

# VMware Integrated OpenStack Installation and Configuration Guide

Update 1

Modified on 08 OCT 2018

VMware Integrated OpenStack 5.0



vmware®

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# Installing and Configuring VMware Integrated OpenStack

1

The *VMware Integrated OpenStack Installation and Configuration Guide* explains the process of deploying OpenStack in your VMware vSphere<sup>®</sup> environment.

Before installing VMware Integrated OpenStack, review the deployment and networking modes described in this guide and ensure that your environment meets the stated requirements. Once you are ready, prepare your vCenter Server<sup>®</sup> instance and deploy the VMware Integrated OpenStack vApp. The vApp provides a workflow that guides you through the rest of the deployment process, allowing you to specify your management and compute clusters, configure networking, and add resources. After deployment, you can use the vApp to add components or otherwise modify the configuration of your OpenStack cloud infrastructure.

## Intended Audience

This guide is for system administrators and developers who want to integrate their vSphere deployment with OpenStack services. To do so successfully, you should be familiar with vSphere and the OpenStack components and functions. If you are deploying VMware Integrated OpenStack with VMware NSX<sup>®</sup> Data Center for vSphere<sup>®</sup> (NSX-V) or NSX<sup>®</sup> Transformers™ (NSX-T), you should also be familiar with the administration of those products.

## VMware Technical Publications Glossary

VMware Technical Publications provides a glossary of terms that might be unfamiliar to you. For definitions of terms as they are used in VMware technical documentation, go to <http://www.vmware.com/support/pubs>.

# Updated Information

This *Installation and Configuration Guide* is updated with each release of the product or when necessary.

This table provides the update history of the *Installation and Configuration Guide*.

Revision	Description
13 JUL 2018	Updated cross references to vRealize Operations Management Pack for OpenStack on <a href="#">Integrating VMware Integrated OpenStack with vRealize Operations Manager</a> .
03 JUL 2018	Initial release.

# Introducing VMware Integrated OpenStack

# 2

With VMware Integrated OpenStack, you can implement OpenStack services on your existing vSphere deployment.

VMware Integrated OpenStack 5.0 is based on the OpenStack Queens release.

This chapter includes the following topics:

- [VMware Integrated OpenStack Architecture](#)
- [Internationalization and Unicode Support](#)
- [OpenStack Foundation Compliance](#)
- [VMware Integrated OpenStack Licensing](#)
- [Customer Experience Improvement Program](#)

## VMware Integrated OpenStack Architecture

The VMware Integrated OpenStack architecture connects vSphere resources to the OpenStack Compute, Networking, Block Storage, Image Service, Identity Service, and Orchestration components.

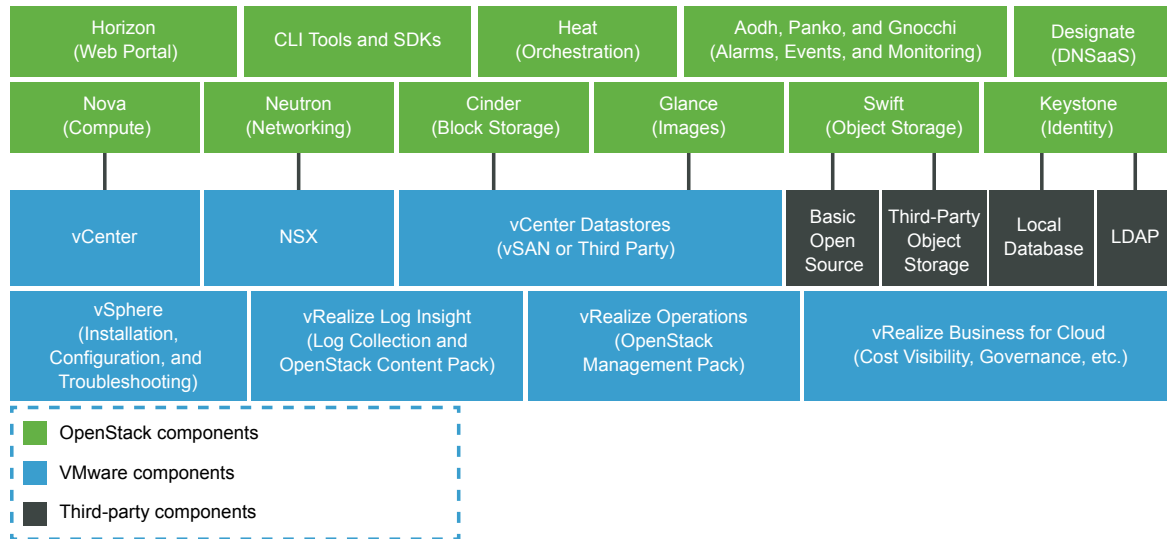
VMware Integrated OpenStack is implemented as compute and management clusters in your vSphere environment.

The compute cluster handles all tenant workloads. Your VMware Integrated OpenStack deployment can have multiple compute clusters. For each compute cluster, one compute driver instance is created in the management cluster.

The management cluster contains the VMs that comprise your OpenStack cloud deployment. It also contains the load balancing, DHCP, and database services.

VMware Integrated OpenStack deployments can use NSX for the Networking component. You will require an additional cluster for the NSX Edge nodes.

**Figure 2-1. Overview of VMware Integrated OpenStack Components**



## Internationalization and Unicode Support

VMware Integrated OpenStack supports UTF-8 character encoding, and its interface and documentation are available in English, French, German, Spanish, Japanese, Korean, Simplified Chinese, and Traditional Chinese.

If using a Linux operating system, configure the system to use the UTF-8 encoding specific to your locale. For example, to use U.S. English, specify the `en_US.UTF-8` locale. For more information, see the documentation for your operating system.

---

**Important** Although VMware Integrated OpenStack supports Unicode, there are certain items whose names can only contain ASCII characters. ASCII characters must be used for all names of OpenStack resources (such as project names, usernames, and image names) and for the underlying infrastructure components (such as ESXi host names, port group names, data center names, and datastore names).

---

## OpenStack Foundation Compliance

Every new version of VMware Integrated OpenStack complies with the latest Guidelines created by the OpenStack Foundation DefCore Committee.

VMware Integrated OpenStack is designated as an OpenStack Powered Platform™ product and therefore provides proven interoperability with all other OpenStack Powered™ products.

For detailed information about the compatibility of VMware Integrated OpenStack with the OpenStack Powered Platform™, go to

<http://www.openstack.org/marketplace/distros/distribution/vmware/vmware-integrated-openstack>.

## VMware Integrated OpenStack Licensing

VMware Integrated OpenStack requires a license key to provide functionality.



VMware Integrated OpenStack licenses are available for Data Center Edition and Carrier Edition.

Data Center Edition is available as a standalone product or as part of VMware vRealize Suite. It is designed for enterprises that want to build a private cloud based on OpenStack.

Carrier Edition is part of the VMware vCloud NFV bundle. It is designed for telecommunications companies and communication service providers that want to build a network functions virtualization (NFV) cloud. In addition to all features of Data Center Edition, it supports the following:

- SR-IOV
- Tenant data centers
- Enhanced Platform Awareness (EPA)
- NSX-managed virtual distributed switch (N-VDS) in enhanced datapath (EDP) mode

To obtain VMware Integrated OpenStack licenses or additional information, see the product page at <https://www.vmware.com/products/openstack.html> or contact your VMware sales representative.

You can use VMware Integrated OpenStack in evaluation mode for 60 days without assigning a license key. When the evaluation license expires, all NFV features are disabled, and you cannot run vRealize Automation workflows. Obtain and assign your VMware Integrated OpenStack license key as soon as possible after installing VMware Integrated OpenStack.

In addition to the VMware Integrated OpenStack license, you will also need sufficient licenses for vSphere and for any other VMware components that you deploy, such as NSX-T.

## Customer Experience Improvement Program

You can configure this product to collect data that can be used by the VMware Customer Experience Improvement Program.

By default, this product participates in VMware's Customer Experience Improvement Program ("CEIP"). Details regarding the data collected through CEIP and the purposes for which it is used by VMware are set forth at the Trust & Assurance Center at <http://www.vmware.com/trustvmware/ceip.html>

You can join or leave the CEIP at any time after deploying VMware Integrated OpenStack. In the vSphere Web Client, select **Home > VMware Integrated OpenStack**. Click the **Manage** tab, then click the **Settings** tab, and select **Customer Experience Improvement Program**. On the page displayed, you can modify your participation in the CEIP.

# VMware Integrated OpenStack Deployment Modes

# 3

You can deploy VMware Integrated OpenStack in high availability (HA), compact, or tiny mode.

This chapter includes the following topics:

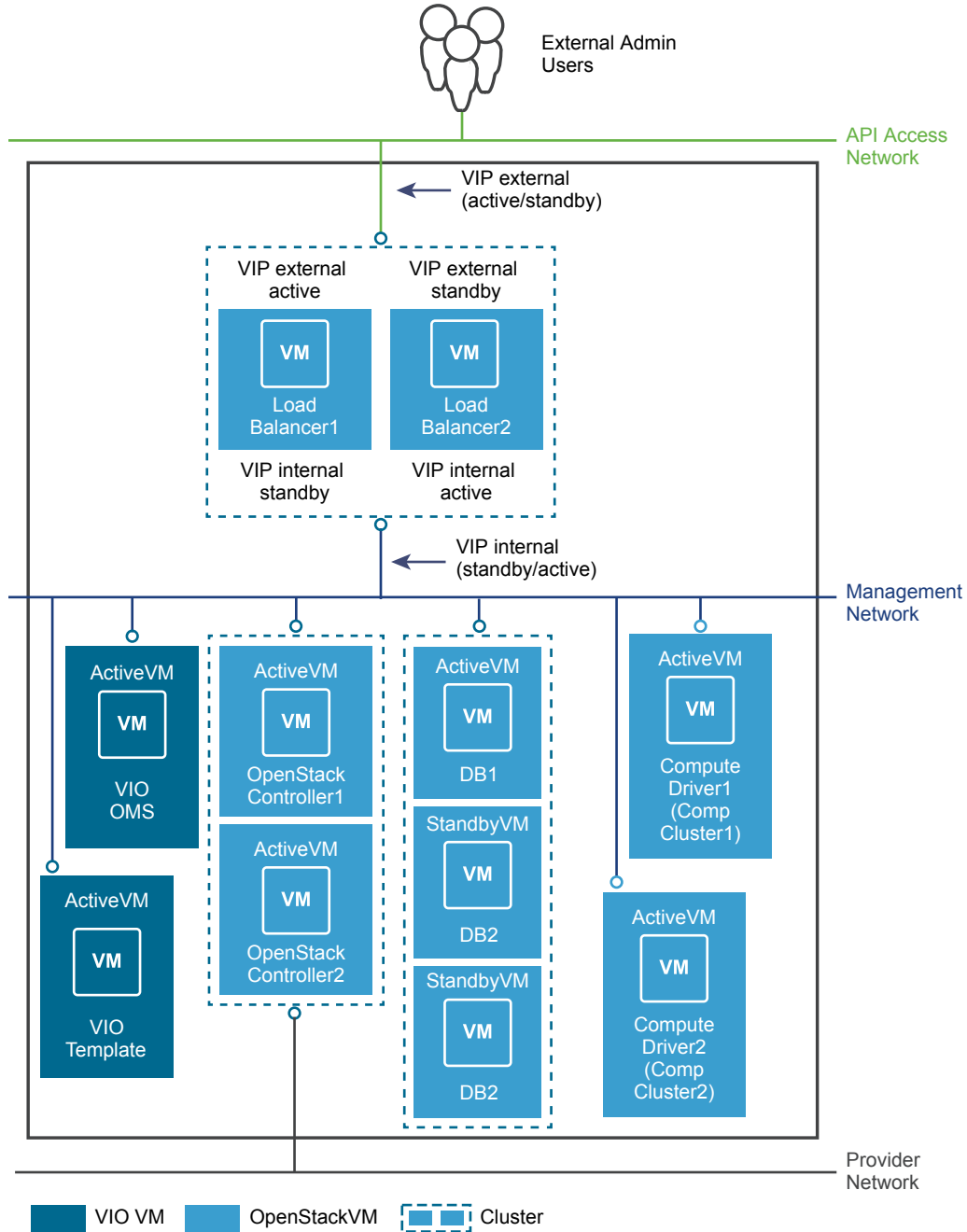
- [VMware Integrated OpenStack Deployment in HA Mode](#)
- [VMware Integrated OpenStack Deployment in Compact Mode](#)
- [VMware Integrated OpenStack Deployment in Tiny Mode](#)

## VMware Integrated OpenStack Deployment in HA Mode

High availability (HA) deployment mode includes active and standby nodes to ensure that services are not interrupted.

An HA deployment runs on 13 virtual machines. These include two load balancers, three database nodes, two controllers, two memory cache nodes, two message queue nodes, one compute node, and the OpenStack Management Server. In VDS networking mode, an additional two nodes are required for DHCP, for a total of 15 virtual machines.

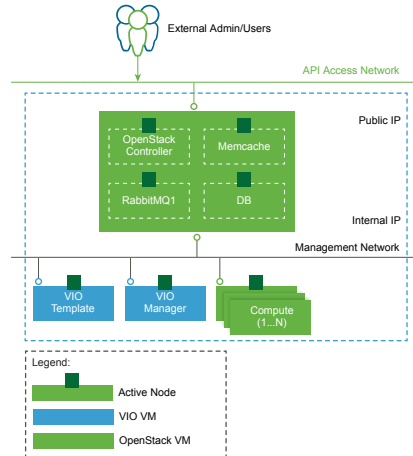
Figure 3-1. Management Cluster in HA Mode



## VMware Integrated OpenStack Deployment in Compact Mode

Compact deployment mode requires fewer hardware resources and less memory than HA mode.

A compact deployment runs on one ESXi host with two virtual machines. All control plane instances are deployed on a single virtual machine, and the compute node is deployed on the second virtual machine. The deployment includes only one controller, message queue, and database instance.

**Figure 3-2. Management Cluster in Compact Mode**

Compact deployment mode is suitable for evaluation and proof of concept testing. If you enable HA or make regular backups of your virtual machines, it can also be used in production environments.

## HA in Compact Mode

You can enable HA on a compact deployment to provide automatic failover of the control plane virtual machines and OpenStack services. HA in compact mode can protect against the following errors:

- An ESXi host stops functioning, loses network connectivity with the master host, or enters the Network Isolated state.
- A control plane or compute virtual machine stops functioning.
- OpenStack services stop functioning

In addition, vSAN provides fault tolerance for storage components.

If you want to enable HA mode on a compact deployment, you must have a vSphere cluster including three ESXi hosts and using vSAN as the management cluster. You then enable vSphere HA and VM monitoring on the management cluster. If you are deploying OpenStack using the public API, you can enable HA by setting the attribute "control\_plane\_ha\_enabled": "true".

## VMware Integrated OpenStack Deployment in Tiny Mode

Tiny deployment mode consolidates OpenStack control plane and compute nodes on a single VM.

Because tiny mode involves only a single VM, you cannot add compute clusters.

## Deploying in Tiny Mode

To deploy VMware Integrated OpenStack in tiny mode, you must use the API.

- 1 Use the POST `/v1/clusters` operation on the OpenStack Management Server:

```
POST https://mgmt-server-ip:8443/v1/clusters
```

## 2 Set the deployment type to TINY in the request body.

```
{
  "attributes": {},
  "deployment_type": "TINY",
  "management_cluster": {
    "moid": "string",
    "name": "string"
  },
}
```

You can set the other parameters as required.

For information about using VMware Integrated OpenStack APIs, see the VMware Integrated OpenStack page on VMware {code} at <https://code.vmware.com/apis/vmware-integrated-openstack>.

# VMware Integrated OpenStack Networking Modes

# 4

You can deploy VMware Integrated OpenStack with NSX Transformers (NSX-T), NSX Data Center for vSphere (NSX-V), or vSphere Distributed Switch (VDS) networking.

This chapter includes the following topics:

- [VMware Integrated OpenStack Deployments with NSX](#)
- [VMware Integrated OpenStack Deployments with VDS](#)
- [Comparison of NSX and VDS Features](#)

## VMware Integrated OpenStack Deployments with NSX

You can deploy VMware Integrated OpenStack using NSX for the Neutron networking component.

### Architectural Overview of NSX Deployments

An VMware Integrated OpenStack NSX deployment includes management and compute clusters with four principal networks. You can also separate the NSX Edge node into a separate cluster.

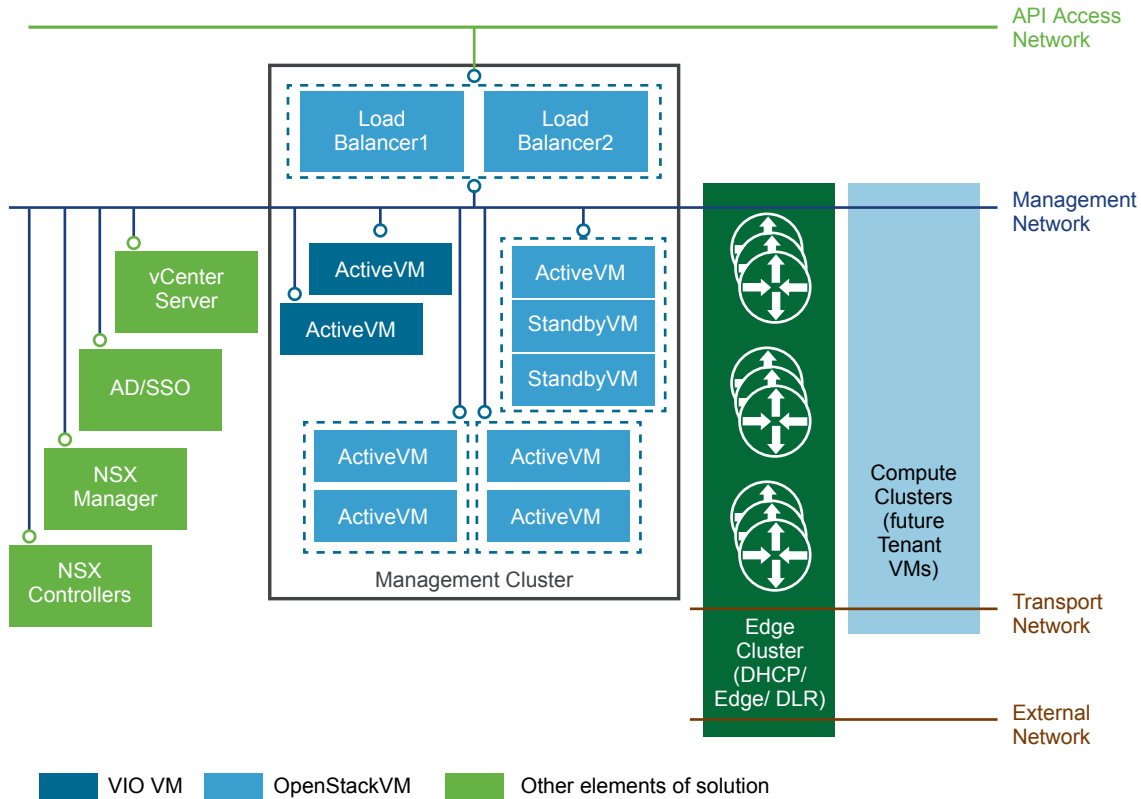
### Cluster and Component Architecture

When you deploy VMware Integrated OpenStack using NSX, you can use two different deployment modes:

- **Compact Mode** - Consists of a single ESXi host running two VMs and using a minimum of 120 GB of storage.
- **HA Mode** - Consists of 8 or more VMs using a minimum of 552 GB of storage.

A typical NSX deployment architecture in HA mode consists of three clusters and four VLANs. For details about the VLANs, see [Physical NSX Network](#).

Figure 4-1. NSX deployment in HA mode



The VMware Integrated OpenStack architecture includes the following clusters and components.

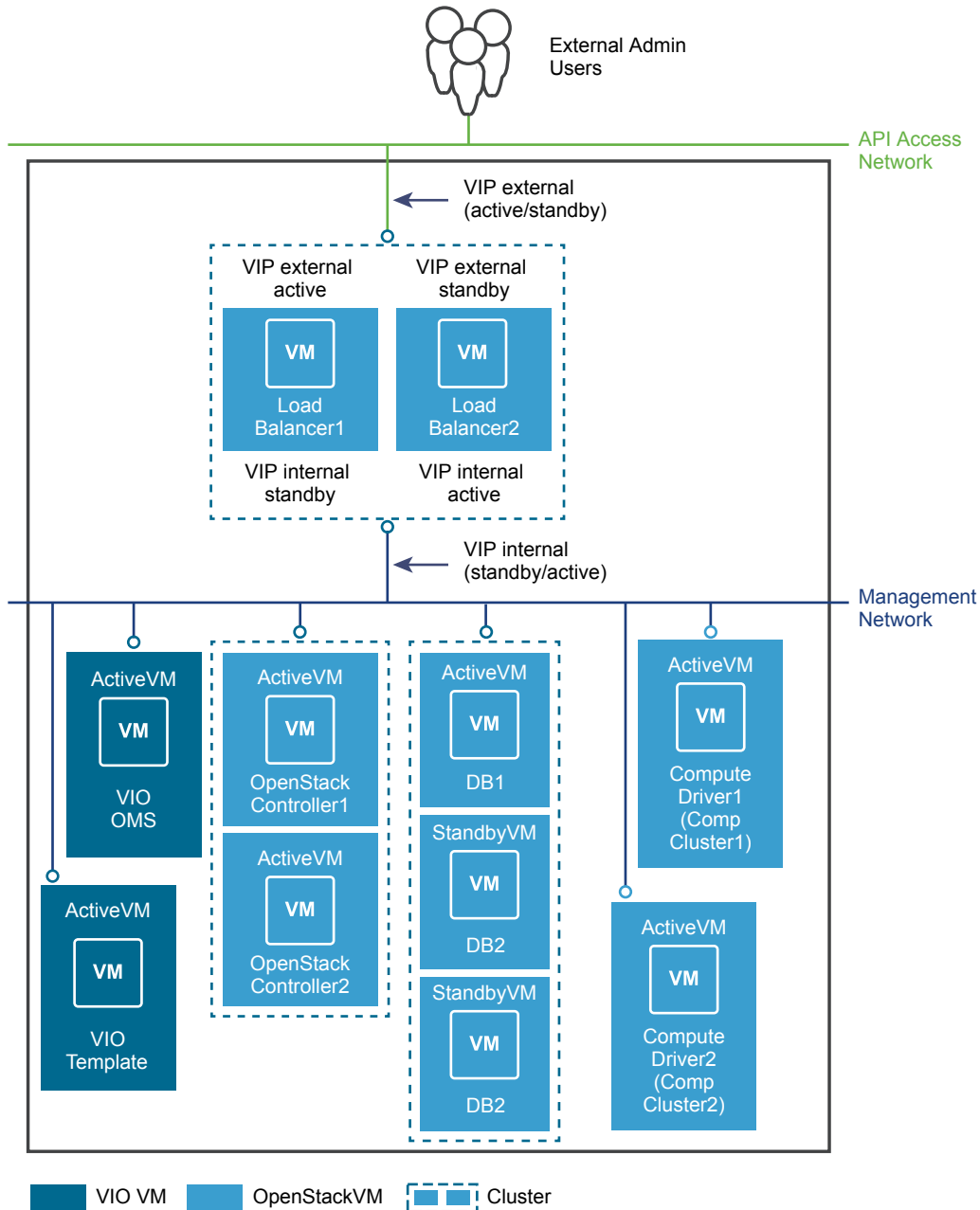
Cluster or Component	Description
vCenter Server instance	A dedicated vCenter Server instance is not required but optimizes deployment.
Active Directory	For user authentication by the OpenStack Identity Service.
Management cluster	Contains all the deployed OpenStack component and management VMs. See <a href="#">Management Cluster</a> below for a detailed description of the management cluster and its components.
Compute cluster	Compute resources for Nova. All tenant VMs are created on these compute clusters.
NSX Edge cluster	Contains Edge VMs that provide edge security and gateway services to logical networks, and provide DHCP, Floating IP (NAT), Security Groups and routing functions for the OpenStack Networking component.
NSX Manager	The centralized network management component of NSX that provides an aggregated system view.
NSX Controllers	An advanced distributed state management system that controls virtual networks and overlay transport tunnels.
Management network	Carries traffic among the management components.
API access network	Exposes the VMware Integrated OpenStack dashboard and provides access for tenants to the OpenStack APIs and services.
Transport network	Connects the DHCP nodes in the Edge cluster with the compute clusters.
External Network	Provides external access for the VMware Integrated OpenStack deployments.

The NSX Controller and NSX Manager nodes can be deployed on separate clusters or hosts. It is a best practice to deploy the NSX Controller and NSX Manager nodes in the Management Cluster.

## Management Cluster

The Management Cluster contains all the deployed OpenStack component and management VMs.

**Figure 4-2. Management cluster in HA mode**



The management cluster contains the following components.



Component	Description	Nodes
Load Balancers	Provide HA and enable horizontal scale-out architecture.	2 (1 active, 1 standby)
Databases (DBs)	Instances of MariaDB that store the OpenStack metadata. RabbitMQ, the message queue service used by all OpenStack services, also runs on the database nodes.	3 (1 active, 2 standby)
VMware Integrated OpenStack Controller	Contains all the OpenStack services, including Compute, Block Storage, Image Service, Identity Service, and Object Storage. The memcache service, which enables production-grade performance for the Identity Service, also runs on the controller nodes.	2 (both active)
Compute Driver	Contains a subset of Compute processes that interact with the compute clusters to manage VMs.	1 per compute cluster
VMware Integrated OpenStack Manager Service (OMS)	The vApp that you use to manage your VMware Integrated OpenStack vApp.	1
VMware Integrated OpenStack Template	Base template for creating all OpenStack service VMs.	1
Ceilometer Databases (optional)	Instances of MongoDB or NoSQL databases for use by Ceilometer.	3 (1 active, 2 standby)

## Physical NSX Network

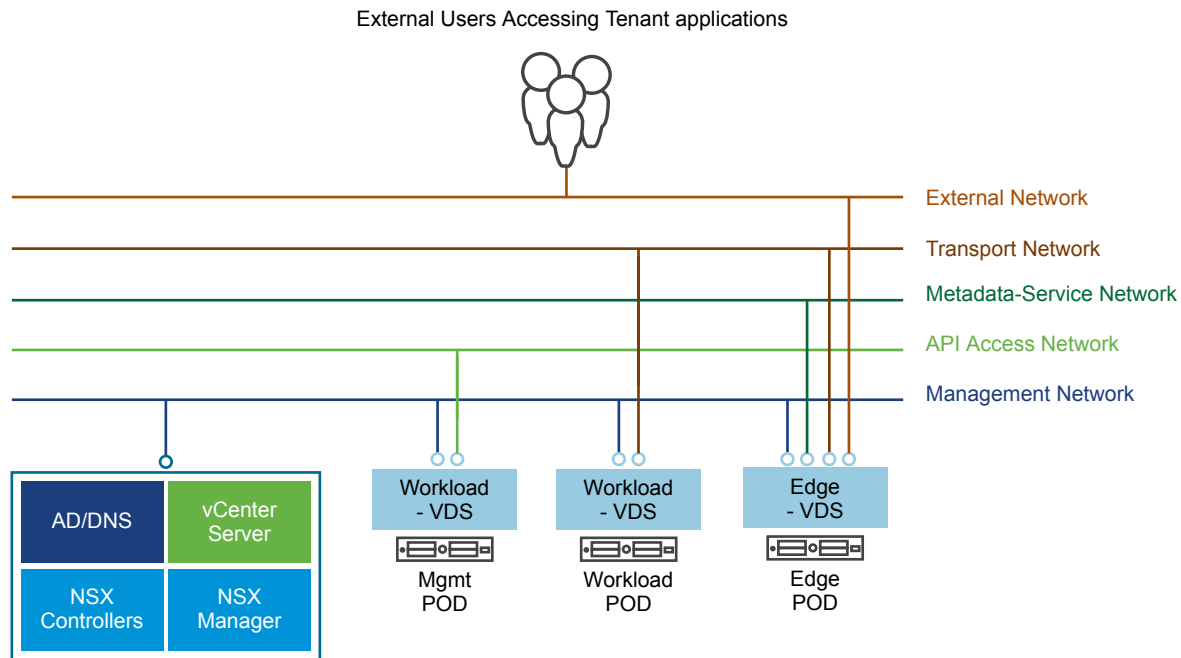
For VMware Integrated OpenStack deployments based on NSX, the API access, Management, Transport, and External network each require a separate and dedicated VLAN.

Request that your network administrator prepare the necessary VLANs.

VLAN	Description
API Access network	Provides access for users to the OpenStack services through APIs or the VMware Integrated OpenStack dashboard. <ul style="list-style-type: none"> <li>Trunk all hosts in the Management cluster to this VLAN.</li> <li>Make externally accessible.</li> <li>Requires five or more continuous IP addresses.</li> </ul>
External	Provides external user access to deployments. <ul style="list-style-type: none"> <li>Trunk all hosts in the NSX Edge cluster to this VLAN.</li> </ul>
Management network	Carries traffic among the management components. <ul style="list-style-type: none"> <li>Trunk all hosts in the Management cluster to this VLAN.</li> <li>Trunk all hosts in the Compute cluster to this VLAN.</li> <li>Requires 18 or more continuous IP addresses. (21 if you add the Ceilometer component.)</li> <li>Enable L2 or L3 access to this VLAN for the following components: <ul style="list-style-type: none"> <li>vCenter Server</li> <li>NSX Manager</li> <li>NSX Controller</li> </ul> </li> </ul> <p>If you are deploying the NSX Manager and NSX Controller VMs on the Management cluster, you must trunk their hosts to the Management network.</p>

VLAN	Description
Metadata-service	The metadata-service network enables new OpenStack deployments to access and run customization scripts made available by the Nova metadata service, which is hosted by the OpenStack controllers.
Transport	Carries traffic among the OpenStack deployments. <ul style="list-style-type: none"> <li>Trunk all hosts in the Compute cluster to this VLAN.</li> <li>Trunk all hosts in the NSX Edge cluster to this VLAN.</li> </ul> <p><b>Important</b> The Maximum Transmission Unit (MTU) settings for the Transport VLAN must be configured to support 1600 bytes. See the Knowledge Base at <a href="http://kb.vmware.com/selfservice/microsites/search.do?language=en_US&amp;cmd=displayKC&amp;externalId=2093324">http://kb.vmware.com/selfservice/microsites/search.do?language=en_US&amp;cmd=displayKC&amp;externalId=2093324</a>.</p>

Figure 4-3. Network Map for NSX Deployments



## VMware Integrated OpenStack Deployments with VDS

VMware Integrated OpenStack can use vSphere Distributed Switch (VDS) to provide basic L2 networking for tenant workloads.

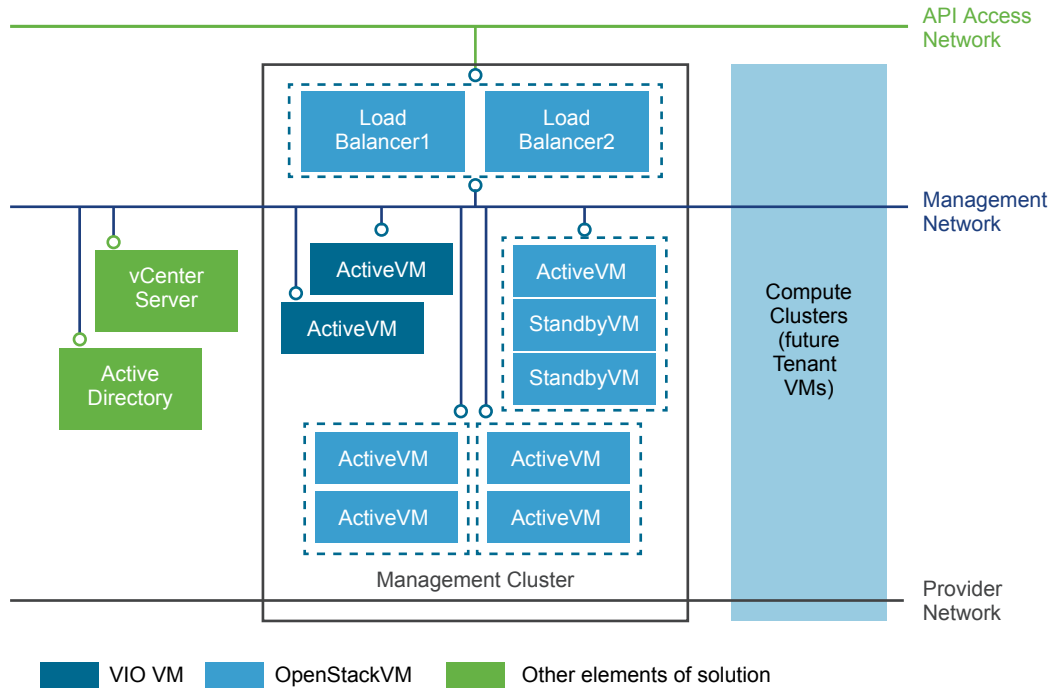
In this model, the VMware Integrated OpenStack administrator creates a set of provider networks and shares them with tenants, who then connect their VMs to these networks.

### Architectural Overview of VDS Deployments

A VMware Integrated OpenStack VDS deployment includes management and compute clusters with three principal networks.

## Cluster and Component Architecture

A typical VDS deployment architecture consists of two clusters and three separate VLANs. For details about the VLANs, see [Physical VDS Network Overview](#).



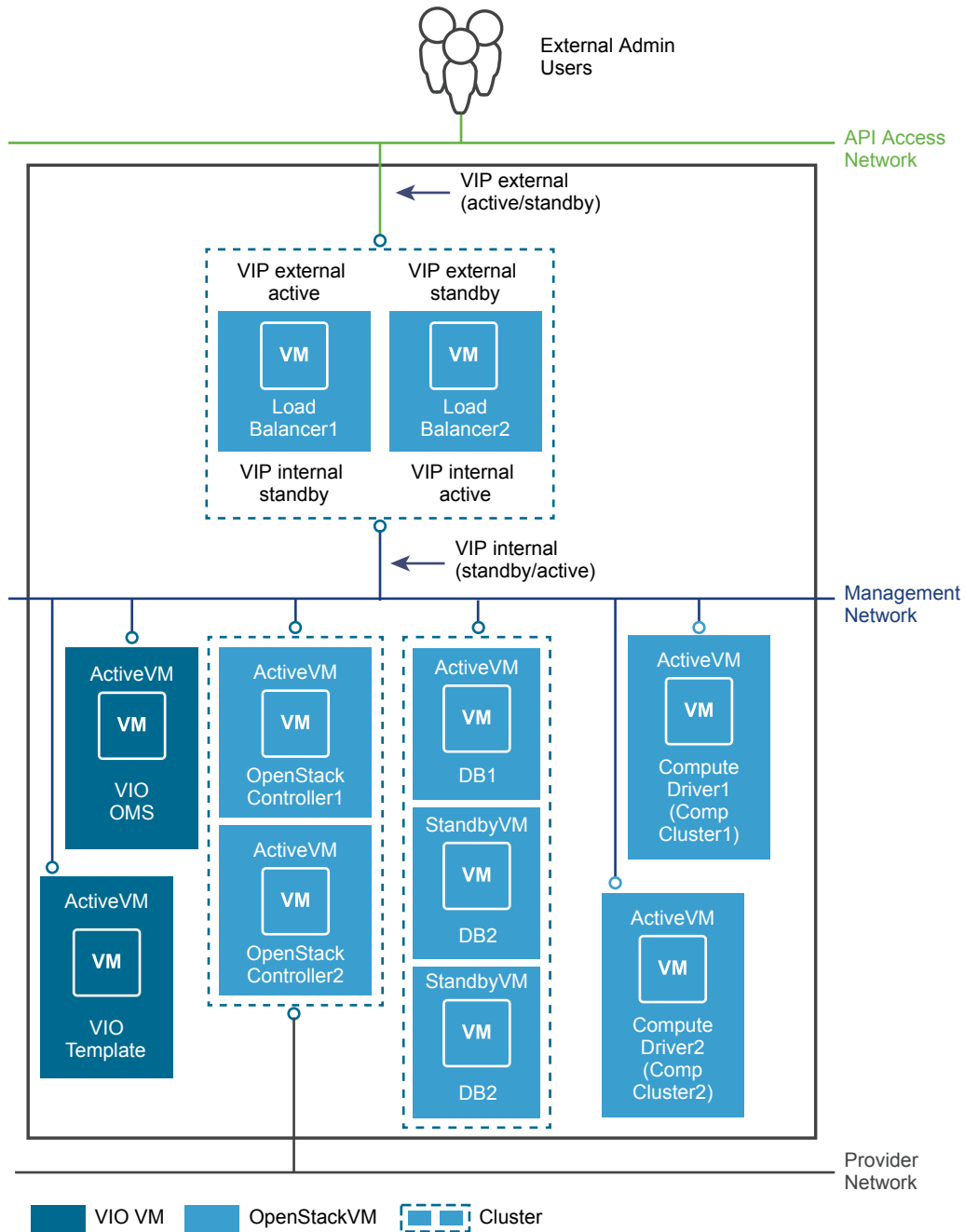
The VMware Integrated OpenStack architecture includes the following clusters and components.

Cluster or Component	Description
vCenter Server instance	Configure a vCenter Server dedicated to your VMware Integrated OpenStack deployment. This is not required but optimizes deployment.
Active Directory	For user authentication by the OpenStack Identity Service.
Management cluster	Contains all the deployed OpenStack component and management VMs. See the <a href="#">Management Cluster</a> below for a detailed description of the management cluster and its components.
Compute cluster	Compute resources for Nova. All tenant VMs are created on these compute clusters.
Management network	Carries traffic among the management components.
API access network	Exposes the VMware Integrated OpenStack dashboard and provides access for tenants to the OpenStack APIs and services.
Provider network	Connects the DHCP nodes in the management cluster with the compute clusters. See <a href="#">Management Cluster</a> below.

### Management Cluster

The Management Cluster contains all the deployed OpenStack component and management VMs.

The DHCP nodes in the VDS-based deployment architecture are the principal distinction from a VDS-based deployment architecture. The DHCP nodes manage the IP addresses for tenant VMs and connect them to the Provider network.



The management cluster contains the following components.

Component	Description	Nodes
Load Balancers	Provide HA and enable horizontal scale-out architecture.	2 (1 active, 1 standby)
Databases (DBs)	Instances of MariaDB that store the OpenStack metadata. RabbitMQ, the message queue service used by all OpenStack services, also runs on the database nodes.	3 (1 active, 2 standby)

Component	Description	Nodes
VMware Integrated OpenStack Controller	Contains all the OpenStack services, including Compute, Block Storage, Image Service, Identity Service, and Object Storage. The memcache service, which enables production-grade performance for the Identity Service, also runs on the controller nodes.	2 (both active)
DHCP	Provide IP addresses to the virtual machines connected to the Provider network.	2 (both active)
Compute Driver	Contains a subset of Compute processes that interact with the compute clusters to manage VMs.	1 per compute cluster
VMware Integrated OpenStack Manager Service (OMS)	The vApp that you use to manage your VMware Integrated OpenStack vApp.	1
VMware Integrated OpenStack Template	Template for redeploying failed OpenStack deployments. This template preserves the configuration settings to facilitate redeployment.	1

The DHCP nodes in the VDS-based deployment architecture are the principal distinction from a VDS-based deployment architecture. These DHCP nodes manage the IP addresses for tenant VMs and connect them to the Provider network.

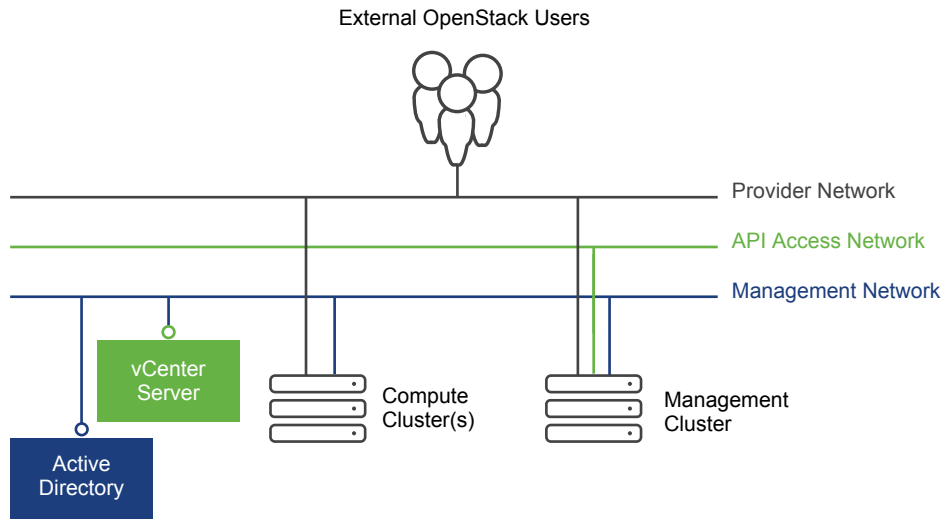
## Physical VDS Network Overview

A VMware Integrated OpenStack deployment with VDS networking requires three VLANs.

Request your network administrator to prepare the following VLANs.

VLAN	Description
API Access network	<p>The API Access network provide access for users to the OpenStack services through APIs or the VMware Integrated OpenStack dashboard .</p> <ul style="list-style-type: none"> <li>Trunk all hosts in the Management cluster to this VLAN.</li> <li>Make externally accessible.</li> <li>Requires 5 or more continuous IP addresses.</li> </ul>
Management network	<p>The Management network carries traffic among the management components.</p> <ul style="list-style-type: none"> <li>Trunk all hosts in the Management cluster to this VLAN.</li> <li>Trunk all hosts in the Compute cluster to this VLAN.</li> <li>The vCenter Server needs to be connected to this network over L2 or L3.</li> <li>Requires 18 or more continuous IP addresses. (21 if you add the Ceilometer component.)</li> </ul>
Provider	<p>The Provider network connects DHCP services with the OpenStack deployments in the Compute cluster.</p> <ul style="list-style-type: none"> <li>Trunk all hosts in the Management cluster to this VLAN.</li> <li>Trunk all hosts in the Compute cluster to this VLAN.</li> </ul>

**Figure 4-4. VMware Integrated OpenStack VDS Physical Network**



## Comparison of NSX and VDS Features

VMware Integrated OpenStack offers different features depending on whether you deploy with VDS or NSX networking.

Supported Feature	VDS	NSX
Provider networks leveraging VLANs	Yes	Yes
High availability for the API/management plane	Yes	Yes
DC-wide control plane scale	Limited	High
Layer 3/NAT high availability and scale	No	Yes

Supported Feature	VDS	NSX
Neutron feature set: <ul style="list-style-type: none"> <li>■ Private logical network identifier independent of VLANs</li> <li>■ Highly available DHCP service</li> <li>■ Security groups</li> <li>■ Virtual routers</li> <li>■ Integration and support of metadata service</li> <li>■ Centralized or distributed Layer 3</li> <li>■ NAT and floating IP address support</li> </ul>	No	Yes
Enterprise features: <ul style="list-style-type: none"> <li>■ Micro-segmentation with line-rate stateful distributed firewall</li> <li>■ Provider-side security via service insertion</li> <li>■ In-kernel distributed routing</li> </ul>	No	Yes
Tenant creation of private Layer 2 networks	No	Yes
Content packs for vRealize Operations Manager and vRealize Log Insight	No	Yes

# VMware Integrated OpenStack System Requirements

# 5

Before you begin the VMware Integrated OpenStack deployment tasks, your system must comply with all hardware, software, networking, and storage requirements.

This chapter includes the following topics:

- [Software Requirements for VMware Integrated OpenStack](#)
- [Hardware Requirements for VMware Integrated OpenStack](#)

## Software Requirements for VMware Integrated OpenStack

VMware Integrated OpenStack works together with various software products to provide functionality.

VMware Integrated OpenStack 5.0 requires the following products:

- vSphere 6.5 or later, including:
  - vCenter Server 6.5 or later
  - ESXi 6.5 or later
  - vSAN 6.6.1 Upgrade 2 or later
- (NSX-T deployments) NSX-T 2.1.0 or later
- (NSX-V deployments) NSX-V 6.3.6 or later

VMware Integrated OpenStack 5.0 is also compatible with the following products:

- vRealize Automation 7.3.1 or later
- vRealize Log Insight 4.6.0 or later
- vRealize Operations Manager 6.7 or later
- vRealize Operations Management Pack for OpenStack 5.0

For the most current information about supported versions, see the VMware Product Interoperability Matrices at [https://www.vmware.com/resources/compatibility/sim/interop\\_matrix.php](https://www.vmware.com/resources/compatibility/sim/interop_matrix.php).



## Hardware Requirements for VMware Integrated OpenStack

The specific hardware required to run VMware Integrated OpenStack depends on the type of deployment and networking that you select.

**Note** Each ESXi host used for VMware Integrated OpenStack must have at least eight logical processors.

### HA Deployments

Component	VMs	vCPUs	vRAM (GB)	vDisk Space (GB)
OpenStack Management Server	1	VDS: 2 (2 per VM) NSX: 4 (4 per VM)	4 (4 per VM)	25 (25 per VM)
Load balancing service	2	4 (2 per VM)	8 (4 per VM)	40 (20 per VM)
Database service	3	12 (4 per VM)	48 (16 per VM)	240 (80 per VM)
Memory cache service	2	4 (2 per VM)	32 (16 per VM)	40 (20 per VM)
Message queue service	2	8 (4 per VM)	32 (16 per VM)	40 (20 per VM)
Controller	2	16 (8 per VM)	32 (16 per VM)	160 (80 per VM)
Compute service (Nova CPU)	1	2 (2 per VM)	4 (4 per VM)	20 (20 per VM)
TOTAL	13	VDS: 48 NSX: 50	160	565

### Compact Deployments

Component	VMs	vCPUs	vRAM (GB)	vDisk Space (GB)
OpenStack Management Server	1	2	4	25
Controller	1	8	16	80
Compute service (Nova CPU)	1	2	4	20
TOTAL	3	12	24	125

### Tiny Deployments

Component	VMs	vCPUs	vRAM (GB)	vDisk Space (GB)
VMware Integrated OpenStack	1	8	24	80 (20 + 60)

### VDS Networking

For HA deployments with VDS networking, the following resources are also required.

Component	VMs	vCPUs	vRAM (GB)	vDisk Space (GB)
DHCP service	2	8 (4 per VM)	32 (16 per VM)	40 (20 per VM)

For compact and tiny deployments with VDS networking, the DHCP service runs on the controller node and does not require independent virtual machines.

## NSX-V Networking

See "System Requirements for NSX Data Center for vSphere" in the *NSX Installation Guide* for your version of NSX-V.

## NSX-T Networking

See "System Requirements" in the *NSX-T Installation Guide* for your version of NSX-T.

## Additional Components

If you want to use Ceilometer, the following resources are also required.

Component	VMs	vCPUs	vRAM (GB)	vDisk Space (GB)
Ceilometer	1	4 (4 per VM)	4 (4 per VM)	20 (20 per VM)
Database (Gnocchi or NoSQL)	3	12 (4 per VM)	12 (4 per VM)	60 (20 per VM)
TOTAL	4	16	16	80

# Preparing Your Environment

You prepare your network and vCenter Server instance before installing VMware Integrated OpenStack.

The specific procedure for preparing your environment depends on the networking mode you have chosen.

This chapter includes the following topics:

- [Required Network Ports](#)
- [Prepare for NSX-T Deployment](#)
- [Prepare for NSX-V Deployment](#)
- [Prepare for VDS Deployment](#)

## Required Network Ports

You open required ports on your firewall to ensure that VMware Integrated OpenStack can operate properly.

**Note** In a compact deployment, controllers, load balancers, and database nodes are deployed as a single virtual machine.

Virtual Machine	Port Number	Network	Service or Product	Description
Load balancers, controllers, database nodes, and compute nodes	22	Internal	SSH	SSH (used by Ansible)
OpenStack Management Server	123 (UDP)	Internal	NTP	NTP service
Load balancers	443	Public and internal	OpenStack dashboard service	Horizon
OpenStack Management Server	443	Internal	OpenStack Management Server	OpenStack Management Server
ESXi hosts	443	Internal	ESXi hosts	ESXi API endpoint
NSX Manager	443	Internal	NSX Manager	NSX Manager endpoint
vCenter Server appliance	443	Internal	vCenter Server	vCenter Server API endpoint

Virtual Machine	Port Number	Network	Service or Product	Description
Load balancers and database nodes	3306	Public and internal	OpenStack API services	Database cluster
Database nodes	4369	Internal	OpenStack RPC bus	RabbitMQ port mapper daemon (epmd) service
Database nodes	4444	Internal	OpenStack database	MariaDB Galera state snapshot transfers
Database nodes	4567	Internal	OpenStack database	MariaDB Galera replication traffic
Database nodes	4568	Internal	OpenStack database	MariaDB Galera incremental state transfers
Load balancers and controllers	5000	Public and internal	OpenStack API services	Keystone API endpoint services
Database nodes	5672	Internal	OpenStack RPC bus	RabbitMQ message bus
Load balancers and controllers	6080	Public and internal	OpenStack console services	novnc proxy
Load balancers and controllers	6083	Public and internal	OpenStack console services	Serial proxy
Load balancers and controllers	6090	Public and internal	OpenStack console services	MKS proxy
Load balancers and controllers	8000	Public and internal	OpenStack API services	Heat CloudFormation API endpoint
Load balancers and controllers	8004	Public and internal	OpenStack API services	Heat API endpoint services
Load balancers	8080	Internal	OpenStack load balancer UI	HAProxy web UI
OpenStack Management Server	8088	Internal	OpenStack Management Server	Jarvis
OpenStack Management Server	8443	Internal	OpenStack Management Server	OpenStack Management Server API documentation (OpenAPI/Swagger)
Load balancers and controllers	8774	Public and internal	OpenStack API services	Nova API endpoint services
Controllers	8775	Internal	OpenStack metadata	Metadata service (required unless config drive is used)
Load balancers and controllers	8776	Public and internal	OpenStack API services	Cinder API endpoint services
Load balancers and controllers	8778	Public and internal	OpenStack API services	Nova Placement API services

Virtual Machine	Port Number	Network	Service or Product	Description
Load balancers and controllers	9191	Internal	OpenStack API services	Glance Registry endpoint
Load balancers and controllers	9292	Public and internal	OpenStack API services	Glance API endpoint
vCenter Server appliance	9443	Internal	vCenter Server	vCenter Server
OpenStack Management Server	9449	Internal	vAPI	vAPI
Load balancers and controllers	9696	Public and internal	OpenStack API services	Neutron API endpoint
Database nodes	11211	Internal	OpenStack control plane cache	Memory cache services for controller nodes
Load balancers and controllers	35357	Public and internal	OpenStack API services	Keystone Admin API endpoint

If you want to use LDAP or Active Directory, the following ports must also be open.

Virtual Machine	Port Number	Network	Service or Product	Description
Active Directory or LDAP hosts	389	Internal	Domain controller or LDAP server	Serving LDAP requests (non-secured)
Active Directory or LDAP hosts	636	Internal	Domain controller or LDAP server (LDAPS)	Serving LDAP requests (secured)
Active Directory or LDAP hosts	3268	Internal	Domain controller	Serving LDAP requests with global catalog (non-secured)
Active Directory or LDAP hosts	3269	Internal	Domain controller (LDAPS)	Serving LDAP requests with global catalog (secured)

If you want to forward logs to vRealize Log Insight, the following port must also be open.

Virtual Machine	Port Number	Network	Service or Product	Description
vRealize Log Insight syslog server	514 (TCP or UDP)	Internal	Syslog server	Syslog service

If you deploy Ceilometer, the following ports must also be open.

Virtual Machine	Port Number	Network	Service or Product	Description
Ceilometer and Gnocchi storage nodes	22	Internal	SSH	SSH (used by Ansible)
Load balancers and Gnocchi storage nodes	8041	Public and internal	OpenStack API services	Gnocchi API endpoint

Virtual Machine	Port Number	Network	Service or Product	Description
Load balancers and Ceilometer nodes	8042	Public and internal	OpenStack API services	Aodh API endpoint
Load balancers and Ceilometer nodes	8779	Public and internal	OpenStack API services	Panko API endpoint

If you deploy Designate, the following port must also be open.

Virtual Machine	Port Number	Network	Service or Product	Description
Load balancers and controllers	9001	Public and internal	OpenStack API services	Designate endpoint

## Prepare for NSX-T Deployment

If you have chosen to deploy VMware Integrated OpenStack with NSX-T networking, configure your environment as described in the following procedure.

For details about working with vCenter Server, see the vSphere documentation.

### Prerequisites

- Deploy vCenter Server. You can optimize performance by using a separate vCenter Server instance dedicated to VMware Integrated OpenStack.
- Deploy and configure NSX-T and all related nodes. See the documentation for your version of NSX-T.
- In NSX-T, create a tier-0 router for VMware Integrated OpenStack.
- If you want to use native DHCP, create a profile in NSX-T. See "Create a DHCP Server Profile" in the *NSX-T Administration Guide* for your version.
- If you want to use metadata, create a metadata proxy server in NSX-T and specify the first IP address in the VMware Integrated OpenStack management network IP range as the URL for the Nova server. See "Add a Metadata Proxy Server" in the *NSX-T Administration Guide* for your version.
- Open the TCP and UDP ports required by VMware Integrated OpenStack. See [Required Network Ports](#).
- Obtain the following NSX-T parameters. You configured these parameters when deploying NSX-T.
  - FQDN or IP address of the NSX Manager
  - Username and password to access the NSX Manager
  - Overlay transport zone
  - VLAN transport zone
  - Tier-0 router
  - (Optional) DHCP profile
  - (Optional) Metadata proxy server and value of the secret parameter

## Procedure

- 1 Configure the management, API access, transport, and external networks and assign a dedicated VLAN to each.

- a Ensure that the management and API access networks have sufficient IP addresses to support your deployment.

The required size of these networks depends on the deployment mode and on whether you want to deploy Ceilometer.

Deployment Mode	IP Address Requirements
HA	<ul style="list-style-type: none"> <li>■ Management network: 11 contiguous IP addresses</li> <li>■ API access network: 2 contiguous IP addresses</li> </ul>
HA with Ceilometer	<ul style="list-style-type: none"> <li>■ Management network: 14 contiguous IP addresses</li> <li>■ API access network: 2 contiguous IP addresses</li> </ul>
Compact or tiny	<ul style="list-style-type: none"> <li>■ Management network: 4 contiguous IP addresses</li> <li>■ API access network: 1 IP address</li> </ul>
Compact or tiny with Ceilometer	<ul style="list-style-type: none"> <li>■ Management network: 7 contiguous IP addresses</li> <li>■ API access network: 1 IP address</li> </ul>

- b Ensure that the vCenter Server, NSX Manager, and NSX Controller instances can access the management network on Layer 2 or Layer 3.
  - c Ensure that the API access network is externally accessible.
  - d On the transport network, set the Maximum Transmission Unit (MTU) to 1600 bytes.
- 2 On your vCenter Server instance, create a data center.
  - 3 In the data center, create the management cluster.
    - For HA deployments, the cluster must contain at least three hosts and at least one datastore.
    - For compact or tiny deployments, the cluster must contain at least one host and at least one datastore.
  - 4 If you are deploying in HA or compact mode, create the compute cluster.  
The compute cluster must contain at least one host and at least one datastore.
  - 5 (Optional) Create the edge cluster.  
If you create an edge cluster, it must contain at least one host and at least one datastore.
  - 6 On each VMware Integrated OpenStack cluster created, open the **Configure** tab and click the **Edit...** button.
    - a On the **vSphere DRS** page, select **Turn ON vSphere DRS**.
    - b On the **vSphere Availability** page, select **Turn ON vSphere HA**.
    - c On the **Failures and Responses** page, select **Enable Host Monitoring**.
    - d Expand the **Host Failure Response** section and set **Default VM Restart Priority** to **High**.

- e Expand the **VM Monitoring** section, select **VM Monitoring** and **Application Monitoring**, and set **Heartbeat monitoring sensitivity to High**.
  - f On the **Admission Control** page, ensure that admission control is enabled.
- 7 On each host in each cluster, enable virtualization hardware extensions in the BIOS.
  - 8 On the VMkernel adapter for the management network, enable **vMotion**.
  - 9 In your data center, create one or more distributed switches for your management, compute, and edge clusters.  
  
A distributed switch can be shared among clusters that are Layer 2 adjacent. Create a separate distributed switch for any cluster that is not Layer 2 adjacent to the other clusters.
  - 10 On each distributed switch created, create the management port group and tag it with the VLAN ID assigned to the management network.
  - 11 On the distributed switch for the management nodes, create the API access port group and tag it with the VLAN ID assigned to the API access network.
  - 12 On the distributed switch for the edge nodes, create the external port group and tag it with the VLAN ID assigned to the external network.

#### What to do next

After you have prepared your environment, you can install VMware Integrated OpenStack. See [Chapter 7 Installing VMware Integrated OpenStack](#).

## Prepare for NSX-V Deployment

If you have chosen to deploy VMware Integrated OpenStack with NSX-V networking, configure your environment as described in the following procedure.

For details about working with vCenter Server, see the vSphere documentation.

#### Prerequisites

- Deploy vCenter Server. You can optimize performance by using a separate vCenter Server instance dedicated to VMware Integrated OpenStack.
- Deploy and configure NSX-V and all related nodes. See the documentation for your version of NSX-V.
- Open the TCP and UDP ports required by VMware Integrated OpenStack. See [Required Network Ports](#).
- Obtain the following NSX-V parameters. You configured these parameters when deploying NSX-V.
  - FQDN or IP address of the NSX Manager
  - Username and password to access the NSX Manager
  - Transport zone
  - Edge cluster



- vSphere Distributed Switch for the edge VTEP
- Port group for the external network

### Procedure

- 1 Configure the management, API access, transport, and external networks and assign a dedicated VLAN to each.

You can also configure an independent metadata service network if desired.

- a Ensure that the management and API access networks have sufficient IP addresses to support your deployment.

The required size of these networks depends on the deployment mode and on whether you want to deploy Ceilometer.

Deployment Mode	IP Address Requirements
HA	<ul style="list-style-type: none"> <li>■ Management network: 11 contiguous IP addresses</li> <li>■ API access network: 2 contiguous IP addresses</li> </ul>
HA with Ceilometer	<ul style="list-style-type: none"> <li>■ Management network: 14 contiguous IP addresses</li> <li>■ API access network: 2 contiguous IP addresses</li> </ul>
Compact or tiny	<ul style="list-style-type: none"> <li>■ Management network: 4 contiguous IP addresses</li> <li>■ API access network: 1 IP address</li> </ul>
Compact or tiny with Ceilometer	<ul style="list-style-type: none"> <li>■ Management network: 7 contiguous IP addresses</li> <li>■ API access network: 1 IP address</li> </ul>

- b Ensure that the vCenter Server, NSX Manager, and NSX Controller instances can access the management network on Layer 2 or Layer 3.
  - c Ensure that the API access network is externally accessible.
  - d On the transport network, set the Maximum Transmission Unit (MTU) to 1600 bytes.
- 2 On your vCenter Server instance, create a data center.
  - 3 In the data center, create the management cluster.
    - For HA deployments, the cluster must contain at least three hosts and at least one datastore.
    - For compact or tiny deployments, the cluster must contain at least one host and at least one datastore.
  - 4 If you are deploying in HA or compact mode, create the compute cluster.
 

The compute cluster must contain at least one host and at least one datastore.
  - 5 (Optional) Create the edge cluster.
 

If you create an edge cluster, it must contain at least one host and at least one datastore.

- 6 On each VMware Integrated OpenStack cluster created, open the **Configure** tab and click the **Edit...** button.
  - a On the **vSphere DRS** page, select **Turn ON vSphere DRS**.
  - b On the **vSphere Availability** page, select **Turn ON vSphere HA**.
  - c On the **Failures and Responses** page, select **Enable Host Monitoring**.
  - d Expand the **Host Failure Response** section and set **Default VM Restart Priority** to **High**.
  - e Expand the **VM Monitoring** section, select **VM Monitoring** and **Application Monitoring**, and set **Heartbeat monitoring sensitivity** to **High**.
  - f On the **Admission Control** page, ensure that admission control is enabled.
- 7 On each host in each cluster, enable virtualization hardware extensions in the BIOS.
- 8 On the VMkernel adapter for the management network, enable **vMotion**.
- 9 In your data center, create one or more distributed switches for your management, compute, and edge clusters.
 

A distributed switch can be shared among clusters that are Layer 2 adjacent. Create a separate distributed switch for any cluster that is not Layer 2 adjacent to the other clusters.
- 10 On each distributed switch created, create the management port group and tag it with the VLAN ID assigned to the management network.
- 11 On the distributed switch for the management nodes, create the API access port group and tag it with the VLAN ID assigned to the API access network.
- 12 On the distributed switch for the edge nodes, create the external port group and tag it with the VLAN ID assigned to the external network.

#### What to do next

After you have prepared your environment, you can install VMware Integrated OpenStack. See [Chapter 7 Installing VMware Integrated OpenStack](#).

## Prepare for VDS Deployment

If you have chosen to deploy VMware Integrated OpenStack with VDS networking, configure your environment as described in the following procedure.

For details about working with vCenter Server, see the vSphere documentation.

#### Prerequisites

- Deploy vCenter Server. You can optimize performance by using a separate vCenter Server instance dedicated to VMware Integrated OpenStack.
- Open the TCP and UDP ports required by VMware Integrated OpenStack. See [Required Network Ports](#).

## Procedure

- 1 Configure the management, API access, and provider networks and assign a dedicated VLAN to each.

- a Ensure that the management and API access networks have sufficient IP addresses to support your deployment.

The required size of these networks depends on the deployment mode and on whether you want to deploy Ceilometer.

Deployment Mode	IP Address Requirements
HA	<ul style="list-style-type: none"> <li>■ Management network: 11 contiguous IP addresses</li> <li>■ API access network: 2 contiguous IP addresses</li> </ul>
HA with Ceilometer	<ul style="list-style-type: none"> <li>■ Management network: 14 contiguous IP addresses</li> <li>■ API access network: 2 contiguous IP addresses</li> </ul>
Compact or tiny	<ul style="list-style-type: none"> <li>■ Management network: 4 contiguous IP addresses</li> <li>■ API access network: 1 IP address</li> </ul>
Compact or tiny with Ceilometer	<ul style="list-style-type: none"> <li>■ Management network: 7 contiguous IP addresses</li> <li>■ API access network: 1 IP address</li> </ul>

- b Ensure that the vCenter Server instance can access the management network on Layer 2 or Layer 3.
  - c Ensure that the API access network is externally accessible.
- 2 On your vCenter Server instance, create a data center.
  - 3 In the data center, create the management cluster.
    - For HA deployments, the cluster must contain at least three hosts and at least one datastore.
    - For compact or tiny deployments, the cluster must contain at least one host and at least one datastore.
  - 4 If you are deploying in HA or compact mode, create the compute cluster.
 

The compute cluster must contain at least one host and at least one datastore.
  - 5 On each VMware Integrated OpenStack cluster created, open the **Configure** tab and click the **Edit...** button.
    - a On the **vSphere DRS** page, select **Turn ON vSphere DRS**.
    - b On the **vSphere Availability** page, select **Turn ON vSphere HA**.
    - c On the **Failures and Responses** page, select **Enable Host Monitoring**.
    - d Expand the **Host Failure Response** section and set **Default VM Restart Priority** to **High**.
    - e Expand the **VM Monitoring** section, select **VM Monitoring** and **Application Monitoring**, and set **Heartbeat monitoring sensitivity** to **High**.
    - f On the **Admission Control** page, ensure that admission control is enabled.

- 6 On each host in each cluster, enable virtualization hardware extensions in the BIOS.
- 7 On the VMkernel adapter for the management network, enable **vMotion**.
- 8 In your data center, create a distributed switch and add all hosts in both clusters to it.
- 9 On the distributed switch, create the management port group and tag it with the VLAN ID assigned to the management network.
- 10 Create the API access port group and tag it with the VLAN ID assigned to the API access network.

**What to do next**

After you have prepared your environment, you can install VMware Integrated OpenStack. See [Chapter 7 Installing VMware Integrated OpenStack](#).

# Installing VMware Integrated OpenStack

# 7

You obtain the VMware Integrated OpenStack OVA package, install it in vSphere, and then create an OpenStack deployment.

## 1 [Install VMware Integrated OpenStack](#)

You deploy VMware Integrated OpenStack on your vCenter Server instance. This installs a vApp through which you configure and implement an OpenStack cloud infrastructure integrated with your vSphere deployment.

## 2 [Create an OpenStack Deployment](#)

You deploy OpenStack by using the VMware Integrated OpenStack vApp on your vCenter Server instance.

## 3 [Verify Your OpenStack Deployment](#)

You verify your OpenStack deployment to ensure that it is functioning properly.

## 4 [Assign the VMware Integrated OpenStack License Key](#)

You assign a license key for VMware Integrated OpenStack to enable its features.

## 5 [Exclude the VMware Integrated OpenStack VMs from Firewall Protection](#)

For NSX based deployments, you must exclude the VMware Integrated OpenStack management VMs from firewall protection to ensure the free flow of traffic.

## 6 [Create the Provider Network in OpenStack](#)

For VMware Integrated OpenStack deployments that use VDS for networking, you must complete the deployment process by creating the Provider network in OpenStack.

## Install VMware Integrated OpenStack

You deploy VMware Integrated OpenStack on your vCenter Server instance. This installs a vApp through which you configure and implement an OpenStack cloud infrastructure integrated with your vSphere deployment.

### Prerequisites

- Verify that your vCenter Server instance is correctly prepared. See [Chapter 6 Preparing Your Environment](#).

- Obtain the VMware Integrated OpenStack OVA file from the product download page at <https://www.vmware.com/go/download-openstack>. The file requires approximately 6 GB of storage space.

### Procedure

- 1 Log in to the vSphere Web Client and select the **Hosts and Clusters** view.
- 2 Right-click the management cluster previously configured for VMware Integrated OpenStack and select **Deploy OVF Template...** from the pop-up menu.
- 3 Provide the path to the VMware Integrated OpenStack OVA and click **Next**.
- 4 Enter a name for the VMware Integrated OpenStack vApp, select the data center that you defined during preparation, and click **Next**.

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**Note** The name of the VMware Integrated OpenStack vApp can contain only letters, numbers, and underscores (\_). The name cannot exceed 60 characters, and the combination of the vApp name and cluster name cannot exceed 80 characters.

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- 5 Select the cluster on which to run the vApp and click **Next**.
- 6 Review the details of the template to be installed and click **Next**.
- 7 Read the license agreements and click **Accept**. Then click **Next**.
- 8 Specify a provisioning format and storage policy, select the datastore on which the vApp files will be stored, and click **Next**.

For more information about provisioning formats, see "About Virtual Disk Provisioning Policies" in the *vSphere Virtual Machine Administration* document for your version of vSphere.

- 9 In the **Destination Network** column, select the management network defined during preparation and click **Next**.
- 10 On the **Customize template** page, enter a password for the `viouser` account on the OpenStack Management Server.  
  
You can also expand the other properties and configure parameters for the OpenStack Management Server, NTP server, and syslog server.
- 11 Once **All properties have valid values** is displayed in the upper left of the page, click **Next**.
- 12 Verify that the vApp can bind to the vService and click **Next**.
- 13 On the **Ready to complete** page, review your settings. When you are satisfied that the settings are correct, click **Finish** to install the vApp.

The VMware Integrated OpenStack vApp is installed and its icon appears in the **Inventories** panel in the **Home** view.

If the icon for VMware Integrated OpenStack does not appear, you might need to manually register the plugin. See "Register the VMware Integrated OpenStack vApp" in the *VMware Integrated OpenStack Administration Guide*.

**What to do next**

Use the vApp to create an OpenStack deployment.

## Create an OpenStack Deployment

You deploy OpenStack by using the VMware Integrated OpenStack vApp on your vCenter Server instance.

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**Note** The following procedure applies only to HA and compact deployments. To deploy in tiny mode, see [VMware Integrated OpenStack Deployment in Tiny Mode](#).

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**Prerequisites**

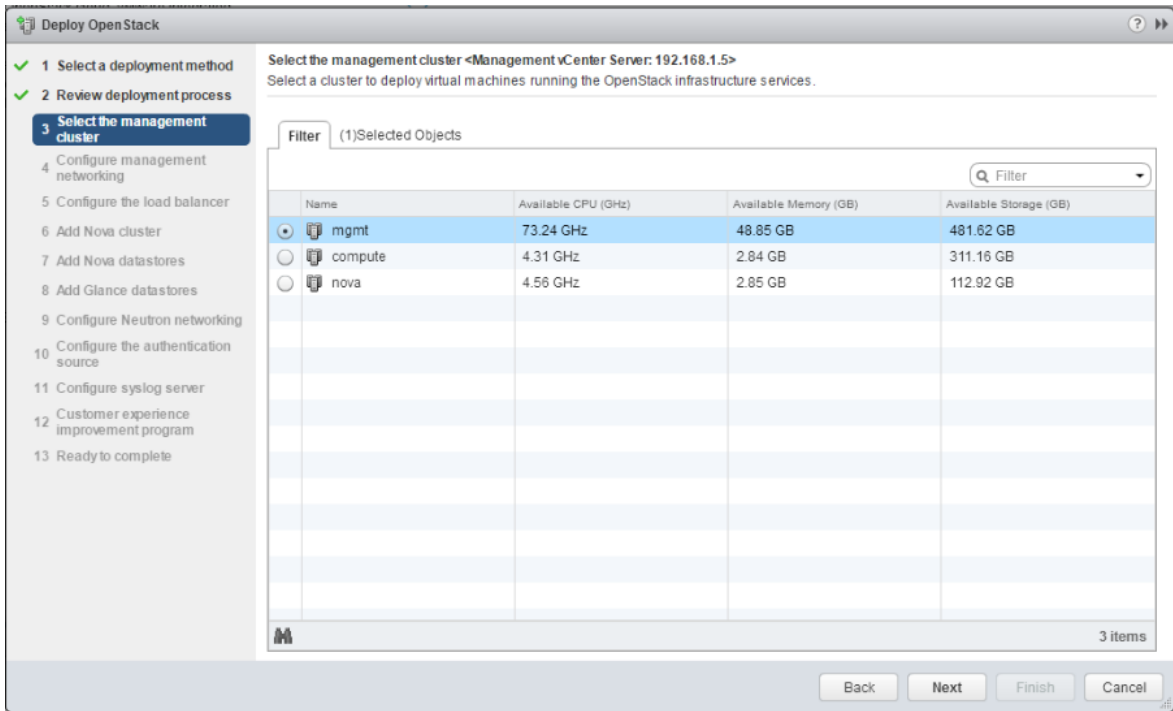
- Prepare your networks and vCenter Server environment. See [Chapter 6 Preparing Your Environment](#).
- Install VMware Integrated OpenStack on your vCenter Server instance. See [Install VMware Integrated OpenStack](#).
- Verify that all required clusters and datastores are available.
  - Clusters must include the required number of hosts and datastores and must not be consumed by another node.
  - Datastores must be mounted to the correct cluster and must not be already configured.
- Verify that the DNS server is set correctly and that the network gateway or firewall forwards DNS requests on private networks.

**Procedure**

- 1 In the vSphere Web Client, select **Home > VMware Integrated OpenStack**.
- 2 On the **Getting Started** tab, click **Deploy OpenStack** in the lower panel.
- 3 Select whether you want to create a new deployment or use an exported template to populate settings.
- 4 Select **HA** or **Compact** from the **Deployment mode** drop-down menu.
- 5 Click **Next** and enter a name for the deployment.
- 6 If you want to use multiple vCenter Server instances, deselect the **Use management vCenter Server as Compute vCenter Server checkbox** and enter the FQDN or IP address, administrator credentials, and availability zone of the compute vCenter Server instance.  
  
Otherwise, select the checkbox and enter the FQDN or IP address, administrator credentials, and availability zone or your vCenter Server instance.
- 7 If the OpenStack Management Server connects to the vCenter Server instance over a private, secure network and you need to disable certificate validation, select the **Ignore the vCenter Server certificate validation checkbox**.

- Click **Next** and select the management cluster that you created during preparation.

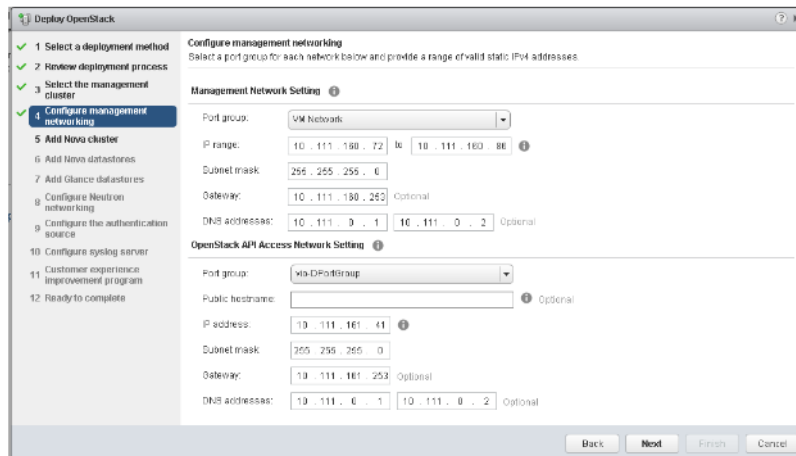
**Figure 7-1. Select the management cluster**



- Click **Next** and provide the settings for the management network and API access network that you defined during preparation.

If you are deploying in compact mode, you can also enter a public hostname for the API access network.

**Figure 7-2. Configure management networking**



- If you are deploying in HA mode, click **Next** and enter the hostname and public virtual IP address of the load balancer service.

- Click **Next** and select the compute cluster that you created during preparation.





**16** If you want to use Active Directory for LDAP authentication, select the **Enable** checkbox in the lower pane.

- a Click the **Add** (plus sign) icon and enter the parameters for Active Directory.

Option	Description
<b>Active Directory domain Name</b>	Specify the full Active Directory domain name; for example, vmware.com.
<b>Keystone Domain Name</b>	A Keystone domain defines the administrative boundaries for management of Keystone entities. A domain can represent an individual, company, or operator owned space.
<b>Bind user</b>	Provide the user name to bind to Active Directory for LDAP requests.
<b>Bind password</b>	Provide the password to allow the LDAP client access to the LDAP server.
<b>Domain controllers</b>	(Optional) VMware Integrated OpenStack automatically chooses the existing Active Directory domain controllers. However, you can specify a list of specific domain controllers to use by selecting the <b>Domain controller</b> radio button and entering the IP address of one or more domain controllers, separated by commas.
<b>Site</b>	(Optional) Optionally, you can limit LDAP searching to a specific deployment site within your organization; for example, sales.vmware.com. Do to this, select the <b>Site</b> radio button and enter the domain name of the site to search.
<b>User Tree DN</b>	(Optional) Enter the search base for users; for example, DC=vmware, DC=com. Defaults to the top of the user tree in most Active Directory deployments.
<b>User Filter</b>	(Optional) Enter an LDAP search filter for users.  <b>Important</b> If your directory contains more than 1,000 objects (users and groups), you must apply a filter to ensure that fewer than 1,000 objects are returned. For examples of filters, see <a href="https://docs.microsoft.com/en-us/windows/desktop/ADSI/search-filter-syntax">https://docs.microsoft.com/en-us/windows/desktop/ADSI/search-filter-syntax</a> .
<b>Group tree DN</b>	(Optional) Enter the search base for groups. Defaults to the top of the user tree in most Active Directory deployments with the '[ldap]suffix' value. For example, group_tree-dn={{ldap_group_tree_dn}}.
<b>Group filter</b>	(Optional) Enter an LDAP search filter to use for groups. For example, group_filter = {{ ldap_group_filter   default('') }}
<b>LDAP admin user</b>	(Optional) If the Keystone Identity provider is configured to work with OpenLDAP, enter the LDAP admin user.

You can click **Advanced Settings** to display additional parameters.

- b Click **Validate** and click **OK**

**17** Click **Next**. If you want to use vRealize Log Insight to manage logs, enter the parameters of your vRealize Log Insight syslog server.

**18** Click **Next** and select whether you want to participate in the Customer Experience Improvement Program.

For more information, see [Customer Experience Improvement Program](#).

**19** Click **Next** and review your settings. When you are satisfied that the settings are correct, click **Finish**.

The VMware Integrated OpenStack vApp begins to deploy your OpenStack cloud.

The status of the deployment is displayed as `Provisioning`. When the status changes to `Running`, the deployment is complete.

#### What to do next

Ensure that your OpenStack deployment is operating normally.

## Verify Your OpenStack Deployment

You verify your OpenStack deployment to ensure that it is functioning properly.

#### Procedure

- 1 In the vSphere Web Client, select **Home > VMware Integrated OpenStack**.
- 2 Under **Deployment List**, select **OpenStack Deployments** and confirm that the deployment status is `Running`.
- 3 Click the name of the deployment and confirm that all nodes are ready.
- 4 In a Web browser, enter the first IP address in the API access network and confirm that you can access the VMware Integrated OpenStack dashboard.
- 5 Log in with the user name and password that you configured during deployment.

If you can successfully perform the preceding actions, this indicates that the OpenStack deployment has been created successfully.

#### What to do next

Assign a license key for VMware Integrated OpenStack.

## Assign the VMware Integrated OpenStack License Key

You assign a license key for VMware Integrated OpenStack to enable its features.

For more information about licensing, see [VMware Integrated OpenStack Licensing](#).

#### Prerequisites

- Install VMware Integrated OpenStack.
- Obtain your VMware Integrated OpenStack license key from <https://my.vmware.com>.

#### Procedure

- 1 In the vSphere Web Client, select **Home > Administration**.
- 2 Click **Licenses** and open the **Licenses** tab.
- 3 Click the **Add** (plus sign) icon, enter your VMware Integrated OpenStack license key, and click **Next**.
- 4 Enter a name for the license key and click **Next**.

- 5 Review the license information and click **Finish**.
- 6 Open the **Assets** tab and select **Solutions**.
- 7 Right-click **VMware Integrated OpenStack 5.0** and select **Assign License**.
- 8 Select your VMware Integrated OpenStack license key from the list of available licenses and click **OK**.

## Exclude the VMware Integrated OpenStack VMs from Firewall Protection

For NSX based deployments, you must exclude the VMware Integrated OpenStack management VMs from firewall protection to ensure the free flow of traffic.

NSX Manager, NSX Controller, and NSX Edge VMs are excluded from firewall protection. You must manually exclude the VMware Integrated OpenStack and vCenter Server VMs by placing them in the Exclusion List to allow traffic to flow freely.

The cluster that contains the vCenter Server can be protected by a firewall, but the vCenter Server must also be in the exclusion list to avoid connectivity issues.

For more information about the exclusion list, see the NSX product documentation.

### Procedure

- 1 In the vSphere Web Client, click **Networking & Security**.
- 2 In **Networking & Security Inventory**, click **NSX Managers**.
- 3 In the Name column, click the NSX Manager for VMware Integrated OpenStack.
- 4 Click the **Manage** tab and click the **Exclusion List** tab.
- 5 Click the **Add (+)** icon.
- 6 Select the OpenStack VMs in the Available Objects column and use the arrows buttons to move them to the Selected Objects column.
- 7 Click **OK** when you are finished.

If a VM has multiple vNICs, all of them are excluded from protection. If you add vNICs to a VM after it is added to the exclusion list, a firewall is deployed on the newly added vNICs. To exclude these vNICs from firewall protection, remove the VM from the exclusion list and add it back to the exclusion list.

## Create the Provider Network in OpenStack

For VMware Integrated OpenStack deployments that use VDS for networking, you must complete the deployment process by creating the Provider network in OpenStack.

### Prerequisites

Verify that VMware Integrated OpenStack was successfully deployed. You can do so by logging into the VMware Integrated OpenStack dashboard.

**Procedure**

- 1 In a Web browser, navigate to the VMware Integrated OpenStack dashboard.

The URL is the Public Virtual IP address configured the deployment process.

- 2 Log in as administrator.

The default administrative username and password were configured during the deployment process.

- 3 Select the default admin project from the drop-down menu in the title bar.

- 4 Select **Admin > System Panel > Networks**.

The Networks page lists the networks that are currently configured.

- 5 Click **Create Network**.

- 6 In the Create Network dialog box, configure the Provider network

Option	Description
<b>Name</b>	Enter a name for the network.
<b>Project</b>	Select the default admin project from the drop-down menu.
<b>Provider Network Type</b>	Select <b>VLAN</b> from the drop-down menu.
<b>Physical Network</b>	Enter <b>dvs</b> .
<b>Segmentation ID</b>	Enter the ID of the Provider VLAN. Contact your network administrator for this value.

- 7 Select the **Admin State** option.

- 8 Click **Create Network**.

The Provider network now appears on the Networks page. This completes the VMware Integrated OpenStack deployment process.

# Configuring Additional Components and Features

# 8

After installing VMware Integrated OpenStack, you can configure additional OpenStack components and integrate your deployment with vRealize Operations Manager.

This chapter includes the following topics:

- [Configuring LBaaS v2.0](#)
- [Integrating VMware Integrated OpenStack with vRealize Operations Manager](#)
- [Enabling the Ceilometer Component](#)
- [Enabling the Designate Component](#)
- [Adding the Swift Component](#)

## Configuring LBaaS v2.0

After you have installed VMware Integrated OpenStack with NSX networking, you can enable LBaaS v2.0 for OpenStack Neutron to distribute incoming requests among designated instances.

Load balancer as a service (LBaaS) v2.0 ensures that workloads are shared predictably among instances and uses system resources more effectively. Because LBaaS v2.0 supports proprietary and open-source load balancing technologies, OpenStack administrators have more options when choosing which back-end technology to use for load balancing.

You can enable LBaaS v2.0 on VMware Integrated OpenStack deployments with NSX-T or NSX-V networking. VMware Integrated OpenStack no longer supports LBaaS v1.0.

The LBaaS configuration process also creates a health monitor and associates it with the LBaaS pool. The health monitor is a Neutron service that checks whether the instances are still running on the specified protocol and port.

## Configure LBaaS Using the CLI

You can configure LBaaS using the command line interface on the node running OpenStack Neutron.

## Prerequisites

- Create a public subnet and router on your network. For an NSX-V deployment, the router type must be exclusive.

---

**Note** You can create the load balancer on a tenant subnet, but you must assign it a floating IP address.

---

- Configure at least one client and at least two server instances.
- If you want to use TLS, verify that the server certificate and private key have been imported into the trust store for secrets on the NSX Manager.

## Procedure

- 1 Log in to the node running OpenStack Neutron and switch to the root user.

```
sudo su -
```

- 2 Create a load balancer.

```
neutron lbaas-loadbalancer-create --name lb-name lb-subnet-id
```

Only members of the specified subnet can be added to the LBaaS pool.

- 3 Create a listener for the new load balancer.

```
neutron lbaas-listener-create --loadbalancer lb-name --protocol {HTTP | TCP | TERMINATED_HTTPS} --protocol-port port-num --name listener-name [--default-tls-container=nsxt-cert-uuid]
```

If you want to use TLS, set the protocol to TERMINATED\_HTTPS and provide the ID of the NSX-T server certificate.

- 4 Create an LBaaS pool.

```
neutron lbaas-pool-create --lb-algorithm lb-method --listener listener-name --protocol {TCP | HTTP} --name pool-name
```

The `--lb-algorithm` parameter accepts the following values.

Argument	Description
LEAST_CONNECTIONS	New client requests are sent to the server with the fewest connections.
ROUND_ROBIN	Each server is used in turn according to the weight assigned to it.
SOURCE_IP	All connections that originate from the same source IP address are handled by the same member of the pool.

- 5 Add at least two server instances to the LBaaS pool that you created.

```
neutron lbaas-member-create --subnet lb-subnet-id --address server1-ip --protocol-port 80 pool-name
neutron lbaas-member-create --subnet lb-subnet-id --address server2-ip --protocol-port 80 pool-name
```

## 6 Set up the health monitor.

```
neutron lbaas-healthmonitor-create --delay delay-seconds --type {HTTP | TCP | PING} --max-retries
number --timeout timeout-seconds --pool pool-name
```

Parameter	Description
<code>--delay</code>	Time in seconds between sending probes to members.
<code>--type</code>	One of the predefined health monitor types. Specify HTTP, TCP, or PING.
<code>--max-retries</code>	Number of connection failures allowed before changing the member status to INACTIVE.
<code>--timeout</code>	Time in seconds that a monitor will wait for a connection to be established before it times out. The timeout value must be less than the delay value.
<code>--pool</code>	New LBaaS pool.

- 7 If you created the load balancer on a tenant subnet, associate a floating IP address with the load balancer.
- 8 (Optional) Send test requests to validate your LBaaS configuration.
  - a Log in to the OpenStack Management Server.
  - b Create a test `index.html` file.
  - c In the same directory, start a web server.

```
sudo python -m SimpleHTTPServer 80
```

- d Log in to the client instance.
- e Run the `wget` command and view whether your requests are being correctly load-balanced across the servers in the pool.
  - For load balancing without TLS, run the following command:

```
wget -O - http://mgmt-server-ip
```

- For load balancing with TLS, run the following command:

```
wget -O - https://mgmt-server-ip
```

## Configure LBaaS Using the GUI

You can configure LBaaS using the **Create a Load Balancer** wizard in the VMware Integrated OpenStack user interface.

TLS cannot be configured on the GUI. If you want to use TLS, see [Configure LBaaS Using the CLI](#).



## Prerequisites

- Create a public subnet and router on your network. For an NSX-V deployment, the router type must be exclusive.

---

**Note** You can create the load balancer on a tenant subnet, but you must assign it a floating IP address.

---

- Configure at least one client and at least two server instances.

## Procedure

- 1 Log in to the VMware Integrated OpenStack dashboard and select **Project > Network > Load Balancers**.
- 2 Click **Create Load Balancer**.
- 3 On the **Load Balancer Details** page, specify a subnet.  
Only members of this subnet can be added to the LBaaS pool.
- 4 Click **Next**. On the **Listener Details** page, create a listener for the new load balancer.
- 5 Click **Next**. On the **Pool Details** page, create an LBaaS pool.

Supported load balancing methods are described as follows:

Method	Description
LEAST_CONNECTIONS	New client requests are sent to the server with the fewest connections.
ROUND_ROBIN	Each server is used in turn according to the weight assigned to it.
SOURCE_IP	All connections that originate from the same source IP address are handled by the same member of the pool.

- 6 Click **Next**. On the **Pool Members** page, select the server and client instances to add to the load balancer pool.
- 7 Click **Next**. On the **Monitor Details** page, set up the health monitor.

Parameter	Description
Monitor type	One of the predefined health monitor types. Specify <b>HTTP</b> , <b>PING</b> , or <b>TCP</b> .
Interval	Time in seconds between sending probes to members.
Retries	Number of connection failures allowed before changing the member status to <b>INACTIVE</b> .
Timeout	Time in seconds that a monitor will wait for a connection to be established before it times out. The timeout value must be less than the interval value.

If you select **HTTP**, you must also configure the HTTP method, expected status code, and URL.

- 8 If you created the load balancer on a tenant subnet, associate a floating IP address with the load balancer.
  - a Click the down arrow to the right of the load balancer and select **Associate Floating IP**.
  - b Select a floating IP address or pool and click **Associate**.
- 9 (Optional) Send test requests to validate your LBaaS configuration.
  - a Log in to the OpenStack Management Server.
  - b Create a test `index.html` file.
  - c In the same directory, start a web server.

```
sudo python -m SimpleHTTPServer 80
```

- d Log in to the client instance.
- e Run the `wget` command to view whether your requests are being correctly load-balanced across the servers in the pool.

```
wget -O - http://mgmt-server-ip
```

## Integrating VMware Integrated OpenStack with vRealize Operations Manager

You can monitor OpenStack resources in vRealize Operations Manager by installing the vRealize Operations Management Pack for OpenStack and the End Point Operations Management agent.

### Prerequisites

- Deploy vRealize Operations Manager. See the *VMware vRealize Operations Manager Help* document for your version.
- Install the vRealize Operations Management Pack for OpenStack. See documentation under the **Resources** tab on the vRealize Operations Management Pack for OpenStack page at <https://marketplace.vmware.com/vsx/solutions/management-pack-for-openstack-2-0--2>.

### Procedure

- 1 Obtain the End Point Operations Management agent installation file for Linux in GZ format.
  - a Go to the vRealize Operations Manager download page at <https://www.vmware.com/go/download-vrops> and select your version of vRealize Operations Manager.
  - b Under **Product Downloads**, find your edition of vRealize Operations Manager and click **Go to Downloads**.
  - c Find End Point Operations Linux Agent – 64 bit (gz file) and click **Download Now**.

- 2 Transfer the End Point Operations Management agent installation file to the OpenStack Management Server and decompress it to a temporary directory.
- 3 In the temporary directory, open the `conf/agent.properties` file and modify the following parameters to match your vRealize Operations Manager deployment.

```
agent.setup.serverIP=vrops-server-ip
agent.setup.serverSSLPort=vrops-server-ssl-port
agent.setup.serverLogin=vrops-admin-username
agent.setup.serverPword=vrops-admin-password
agent.setup.serverCertificateThumbprint=vrops-server-cert-thumbprint
```

- 4 Install the End Point Operations Management agent in VMware Integrated OpenStack.

```
sudo viocli epops install -s epops-install-file.tar.gz -c epops-dir/conf/agent.properties
```

VMware Integrated OpenStack objects are displayed in the vRealize Operations Manager **Inventory Explorer** in the **EP Ops Adapter Resources Group**.

#### What to do next

If you need to reconfigure the End Point Operations Management agent, modify the `agent.properties` file and run the following command:

```
sudo viocli epops reconfig -c epops-dir/conf/agent.properties
```

For more information about command-line parameters, see "viocli epops Command" in the *VMware Integrated OpenStack Administration Guide*.

## Enabling the Ceilometer Component

Ceilometer is a component of OpenStack that polls, collects, and publishes OpenStack service data.

After deploying VMware Integrated OpenStack, you can enable Ceilometer to perform telemetry functions. Enabling or disabling Ceilometer may temporarily affect other OpenStack services.

#### Prerequisites

Ensure that your environment has been prepared for Ceilometer, including three extra contiguous IP addresses on the management network. For other requirements, see the Additional Components section of [Hardware Requirements for VMware Integrated OpenStack](#) and the relevant table in [Required Network Ports](#).

#### Procedure

- 1 In the vSphere Web Client, select **Home > VMware Integrated OpenStack**.
- 2 Click the **Manage** tab and click the **Settings** tab.
- 3 Select **Ceilometer** and click **Enable**.

The virtual machines required by Ceilometer are created and the service is enabled.

**What to do next**

If you no longer want to use Ceilometer, you can disable it on this page. This will stop the Ceilometer service and remove all Ceilometer nodes.

## Enabling the Designate Component

Designate is a component of OpenStack that provides DNS as a service, including domain name registration and zone and record set management for OpenStack clouds.

You enable Designate after completing the VMware Integrated OpenStack deployment.

**Prerequisites**

VMware Integrated OpenStack supports Infoblox, Bind9, and PowerDNS backend servers for Designate. The prerequisites for each type of backend server are listed as follows.

Infoblox:

- Install the Infoblox backend on a network that is connected to a public network in VMware Integrated OpenStack.
- Create a user for Designate to use.
- Create one name server group to serve Designate zones.
  - Set the Designate mDNS servers as external primaries. Set all IP addresses on the eth1 interface of the load balancer node as external primaries.
  - Add a grid member as a grid secondary and select the Lead Secondary option for this member.
  - Add additional grid secondaries as needed.

Bind9:

- Install the Bind9 backend on a network that is connected to a public network in VMware Integrated OpenStack.
- Enable `rndc addzone` or `rndc delzone` functionality to allow receipt of a NOTIFY message from a non-master node. Open `named.conf.options` or `named.conf` in a text editor and add the following lines under options:

```
allow-new-zones yes;
allow-notify{any};
```

PowerDNS:

- Install PowerDNS on a network that is connected to a public network in VMware Integrated OpenStack.
- Enable the API in the `pdns.conf` file.

**Procedure**

- 1 In the vSphere Web Client, select **Home > VMware Integrated OpenStack**.

- 2 Click the **Manage** tab and click the **Settings** tab.
- 3 Click **Configure Designate**.
- 4 Select **Enable Designate**
- 5 Configure Designate with the options for your backend.

- Infoblox backend

Option	Description
Type	Choose the <b>Infoblox</b> server type
DNS server	Infoblox server IP address
DNS port	Port on Infoblox server running DNS service. Default is 53.
WAPI URL	Infoblox WAPI URL. Default is <code>https://&lt;infoblox_server&gt;/wapi/&lt;wapi_version&gt;/</code> . <b>Note</b> The URL must end with "/"
Username	Username for Designate to access Infoblox
Password	Password for Designate to access Infoblox
NS group	Name server group created for Infoblox. See <a href="#">page 52</a> for Infoblox backend.

- Bind9 backend

Option	Description
Type	Choose the <b>Bind9</b> server type
DNS server	Bind9 server IP address
DNS port	Port on Bind9 server running DNS service. Default is 53.
RNDC host	RNDC server IP address. Default is the same as Bind9 server IP address.
RNDC port	RNDC port. Default is 953.
RNDC key	Content in the <code>/etc/bind/rndc.key</code> file

- PowerDNS backend

Option	Description
Type	Choose the <b>PowerDNS</b> server type
DNS server	PowerDNS server IP address
DNS port	Port on PowerDNS server running DNS service. Default is 53.

Option	Description
API endpoint	PowerDNS API endpoint. Default is <code>http://&lt;powerdns_server&gt;/8081</code> .
API key	Value for <code>api-key</code> in <code>/etc/powerdns/pdns.conf</code> file

### What to do next

See the OpenStack Designate documentation at <https://docs.openstack.org/python-designateclient/queens/user/shell-v2.html> for information on how to use Designate.

---

**Important** VMware Integrated OpenStack supports only the v2 API. To perform command-line operations, use the `openstack` command instead of the `designate` command.

---

## Adding the Swift Component

You can manually add OpenStack Swift (object storage) to your VMware Integrated OpenStack. However, Swift is not supported by VMware.

For information about configuring Swift, see the official OpenStack documentation for Swift at <https://docs.openstack.org/swift/queens/install/>.

# Upgrading VMware Integrated OpenStack

# 9

You upgrade to VMware Integrated OpenStack 5.0 by creating a new deployment and migrating to it.

You can upgrade from VMware Integrated OpenStack 4.0 or 4.1 to VMware Integrated OpenStack 5.0. If you are running a version older than 4.0, first upgrade to 4.1 and then upgrade to 5.0.

In the upgrade procedure, you create a VMware Integrated OpenStack 5.0 deployment and migrate your 4.x deployment to it. This requires that you have sufficient hardware and IP address resources to support two deployments temporarily.

You can revert to the pre-upgrade version if the upgrade is not successful or if you no longer want to use version 5.0. To revert an upgrade, see [Revert to a Previous VMware Integrated OpenStack Deployment](#).

This chapter includes the following topics:

- [Upgrade VMware Integrated OpenStack](#)
- [Revert to a Previous VMware Integrated OpenStack Deployment](#)
- [Patch VMware Integrated OpenStack](#)
- [Roll Back a VMware Integrated OpenStack Patch](#)

## Upgrade VMware Integrated OpenStack

You upgrade to VMware Integrated OpenStack 5.0 by installing the new version and migrating your existing deployment.

### Prerequisites

- Download the VMware Integrated OpenStack 5.0 OVA from the product download page at <https://www.vmware.com/go/download-openstack>.
- Prepare sufficient resources to make a duplicate of every node in your current deployment except the memcache and RabbitMQ nodes. If you want to upgrade a compact deployment to an HA deployment, you will need additional resources. See [Hardware Requirements for VMware Integrated OpenStack](#).
- Record any changes made to the OpenStack deployment outside of the `custom.yml` file. Any changes not included in `custom.yml` will not take effect on the new version, and you must configure them again on the new deployment once the upgrade is complete.

- Ensure that your current deployment is running VMware Integrated OpenStack 4.0 or 4.1. If you are running an older version, upgrade to version 4.1 first.

## Procedure

### 1 Add IP Addresses to the Network Configuration

Before upgrading, ensure that your management and API access networks include sufficient IP addresses to support the existing and new deployments concurrently.

### 2 Install the New Version

You install VMware Integrated OpenStack 5.0 on your existing vCenter Server instance.

### 3 Migrate to the New VMware Integrated OpenStack Deployment

You back up your existing data to the new deployment and then migrate to the new deployment. This procedure starts the new deployment and stops the old deployment.

### 4 Delete the Old VMware Integrated OpenStack Deployment

After you upgrade VMware Integrated OpenStack, you can delete the deployment from the previous version.

## Add IP Addresses to the Network Configuration

Before upgrading, ensure that your management and API access networks include sufficient IP addresses to support the existing and new deployments concurrently.

The IP addresses that you configure in this procedure are permanent. After you migrate to the new deployment, these IP addresses will be used instead of the IP addresses assigned to your existing deployment. You will need to update any DNS entries or other references to VMware Integrated OpenStack IP addresses once the upgrade is finished.

---

**Important** Do not include the IP address of the OpenStack Management Server in the management network IP range. If you have already allocated additional IP addresses for upgrades, assign the first available IP address to the OpenStack Management Server and remove it from the management network IP range.

---

## Procedure

- 1 In the vSphere Web Client, select **Home > VMware Integrated OpenStack**.
- 2 Click the **Manage** tab and click the **Networks** tab.
- 3 In the table displayed, right-click the name of the management network and select **Add IP Range**.
- 4 Specify an IP range for the management network of the new deployment.

The new IP range must have at least the same number of IP addresses as the existing management network.

- 5 Right-click the name of the API access network and select **Add IP Range**.



- Specify an IP range for the API access network of the new deployment.

The new IP range must have at least the same number of IP addresses as the existing API access network.

#### What to do next

Install the new version of VMware Integrated OpenStack on your vCenter Server instance.

## Install the New Version

You install VMware Integrated OpenStack 5.0 on your existing vCenter Server instance.

#### Prerequisites

- Add IP address ranges for the new installation. See [Add IP Addresses to the Network Configuration](#).
- Obtain the VMware Integrated OpenStack 5.0 OVA file from the product download page at <https://www.vmware.com/go/download-openstack>. The file requires approximately 6 GB of storage space.

#### Procedure

- In the vSphere Web Client, edit the settings of the management cluster and set **DRS Automation** to **Manual**.
- Right-click the management cluster and select **Deploy OVF Template...** from the pop-up menu.
- Provide the path to the VMware Integrated OpenStack OVA and click **Next**.
- Enter a name for the VMware Integrated OpenStack vApp, select your data center, and click **Next**.

---

**Note** The name of the VMware Integrated OpenStack vApp can contain only letters, numbers, and underscores (\_). The name cannot exceed 60 characters, and the combination of the vApp name and cluster name cannot exceed 80 characters.

---

- Select the cluster on which to run the vApp and click **Next**.
- Review the details of the template to be installed and click **Next**.
- Read the license agreements and click **Accept**. Then click **Next**.
- Specify a provisioning format and storage policy, select the datastore on which the vApp files will be stored, and click **Next**.

For more information about provisioning formats, see "About Virtual Disk Provisioning Policies" in the *vSphere Virtual Machine Administration* document for your version of vSphere.

- In the **Destination Network** column, select the management network and click **Next**.
- On the **Customize template** page, enter a password for the `viouser` account on the OpenStack Management Server.

You can also expand the other properties and configure parameters for the OpenStack Management Server, NTP server, and syslog server.

- 11 Once All properties have valid values is displayed in the upper left of the page, click **Next**.
- 12 Verify that the vApp can bind to the vService and click **Next**.
- 13 On the **Ready to complete** page, review your settings. When you are satisfied that the settings are correct, click **Finish** to install the vApp.

#### What to do next

Migrate your deployment to the new version.

## Migrate to the New VMware Integrated OpenStack Deployment

You back up your existing data to the new deployment and then migrate to the new deployment. This procedure starts the new deployment and stops the old deployment.

#### Prerequisites

- Install VMware Integrated OpenStack 4.1. See [Install the New Version](#).

#### Procedure

- 1 Log in to the new OpenStack Management Server and prepare a directory to store the backup.

```
sudo viocli upgrade prepare old-mgmt-server-ip /nfs-server-folder
```

- 2 Log in to the old OpenStack Management Server and back up its data to the prepared directory.

```
sudo viocli backup mgmt_server new-mgmt-server-ip:/nfs-server-folder
```

- 3 Log in to the new OpenStack Management Server again and reconfigure the new installation using the data backed up from the old installation.

```
sudo viocli upgrade mgmt_server backup-directory new-mgmt-server-ip:/nfs-server-folder
```

The backup directory name is in the format `vio_ms_timestamp`.

- 4 Log out of the vSphere Web Client and log back in.  
This refreshes the interface so that the new deployment is displayed.
- 5 In the vSphere Web Client, select **Home > VMware Integrated OpenStack**.
- 6 Click the **Summary** tab and verify that the **Version Information** table shows the version of the new VMware Integrated OpenStack installation.
- 7 Click the **Manage** tab and click the **Upgrades** tab.

8 In the table displayed, right-click the current deployment and select **Upgrade**.

a Enter a name for the new deployment.

This name must be different from the name of the current deployment.

b If you are upgrading from a compact deployment, select a deployment type for your new deployment in the **Deployment type** drop-down menu.

During the upgrade process, you can change a compact deployment to an HA deployment if desired.

c Click **Next**, review the upgrade configuration, and click **Finish**

The status of the current deployment is Running, and the status of the new deployment is Provisioning.

9 After the status of the new deployment changes to Prepared, right-click the name of the old deployment and select **Migrate Data**.

---

**Important** This action will stop OpenStack services. Services will be down until the upgrade finishes.

---

When the migration process finishes, the status of the new deployment changes to Migrated.

10 Right-click the name of the old deployment and select **Switch to New Deployment**.

When the migration process finishes, the status of the new deployment changes to Running, and the status of the previous deployment changes to Stopped.

OpenStack services are now provided by the new deployment.

#### What to do next

- Upgrade your license key in My VMware. See [KB 2006974](#).
- Update any DNS entries to use the IP addresses of the new VMware Integrated OpenStack deployment.
- For NSX-T deployments, update the metadata proxy configuration in NSX Manager to use the IP address of the new OpenStack Management Server.
- If you have integrated your deployment with vRealize Automation, perform the integration procedure again. Integration does not automatically transfer to the new version of VMware Integrated OpenStack. See [Integrate VMware Integrated OpenStack with vRealize Automation](#).

If the upgrade is unsuccessful or you do not want to use the new version, you can revert to your previous VMware Integrated OpenStack deployment. See [Revert to a Previous VMware Integrated OpenStack Deployment](#).

If the upgrade is successful, you can delete the old VMware Integrated OpenStack deployment. See [Delete the Old VMware Integrated OpenStack Deployment](#).

## Delete the Old VMware Integrated OpenStack Deployment

After you upgrade VMware Integrated OpenStack, you can delete the deployment from the previous version.

---

**Important** After you delete the deployment, you cannot revert to the previous version. Do not delete the deployment until all validation tasks have been completed and you are certain that you will not need to revert to the previous version.

---

### Procedure

- 1 In the vSphere Web Client, select **Home > VMware Integrated OpenStack**.
- 2 Click the **Manage** tab and click the **Upgrades** tab.
- 3 In the table displayed, verify that the status of the new deployment is **Running** and the status of the old deployment is **Stopped**.
- 4 Right-click the old deployment and select **Delete**.
- 5 At the prompt, confirm the deletion.

The deployment no longer appears on the **Upgrades** tab or in the **OpenStack Deployments** list.

## Revert to a Previous VMware Integrated OpenStack Deployment

You can revert to the previous VMware Integrated OpenStack deployment if the upgrade failed or if you do not want to use the new version.

---

**Important** The old deployment is required for reversion. If you have already deleted the old deployment, you cannot revert to the previous version.

---

### Procedure

- 1 In the vSphere Web Client, select **Home > VMware Integrated OpenStack**.
- 2 Under **Deployment List**, click **OpenStack Deployments**.
- 3 In the table displayed, right-click the name of the new deployment and select **Stop OpenStack Services**.
- 4 Click the **Back** button. On the **Summary** tab, click **Change Server...**
- 5 Click **Yes** and select the OpenStack Management Server of the old deployment.
- 6 Under **Deployment List**, click **OpenStack Deployments**.
- 7 In the table displayed, right-click the name of the previous deployment and select **Start OpenStack Services**.

- 8 On the vCenter Server virtual machine, stop the vSphere Web Client service, delete residual files, and restart the service.

```
service-control --stop vsphere-client
cd /etc/vmware/vsphere-client/vc-packages/vsphere-client-serenity/
rm -rf *
cd /usr/lib/vmware-vsphere-client/server/work
rm -rf *
service-control --start vsphere-client
```

- 9 Log out of the vSphere Web Client and log back in.

## Patch VMware Integrated OpenStack

If patches to VMware Integrated OpenStack 5.0 are released, you can install them on your existing deployment.

You install VMware Integrated OpenStack patches by using the `viopatch` utility.

---

**Important** The snapshots created in this process are necessary for reversion. Do not remove these snapshots until all validation tasks have been completed and you are certain that you will not need to revert to the previous version.

---

### Procedure

- 1 In the vSphere Web Client, take a snapshot of the OpenStack Management Server virtual machine.
- 2 Log in to the OpenStack Management Server and take a snapshot.

```
sudo viopatch snapshot take
```

- 3 Transfer the patch file to the OpenStack Management Server virtual machine.
- 4 Add and install the patch file.

```
sudo viopatch add -l patch-file
sudo viopatch install -p patch-name -v patch-version
```

You can run the `sudo viopatch list` command at any time to display all added patches and the corresponding version.

### What to do next

After you have validated that the patched version is operating correctly, you can run `sudo viopatch snapshot remove` to delete the snapshot. This action is destructive and cannot be reversed. You cannot roll back after deleting the snapshot.

If you need to roll back to the previous version, see [Roll Back a VMware Integrated OpenStack Patch](#).

## Roll Back a VMware Integrated OpenStack Patch

You can roll back a VMware Integrated OpenStack patch if the upgrade failed or if you do not want to use the new version.

### Prerequisites

- Verify that you retained the snapshot of the OpenStack Management Server taken in vSphere before the patch.
- Verify that you retained the snapshot of your deployment taken with the `viopatch` utility. You can run `sudo viopatch snapshot list` to confirm whether `viopatch` has a snapshot of the nodes in your deployment.

### Procedure

- 1 Log in to the OpenStack Management Server virtual machine and revert to the previous snapshot.

```
sudo viopatch snapshot revert
```

- 2 In the vSphere Web Client, revert the OpenStack Management Server to the previous snapshot.
- 3 On the OpenStack Management Server virtual machine, restart the OpenStack service.

```
sudo service oms restart
```

- 4 On the vCenter Server virtual machine, stop the vSphere Web Client service, delete residual files, and restart the service.

```
service-control --stop vsphere-client
cd /etc/vmware/vsphere-client/vc-packages/vsphere-client-serenity/
rm -rf *
cd /usr/lib/vmware-vsphere-client/server/work
rm -rf *
service-control --start vsphere-client
```

- 5 Log out of the vSphere Web Client and log back in.