Photon Controller Quick Start Guide

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1 Introduction

This guide explains how to install Photon Controller for demonstration or trial purposes. As a quick start guide, it focuses on a minimal configuration to set up Photon Controller 1.1 with authentication in a controlled environment.

Photon Controller forms part of VMware Photon Platform, a highly scalable multi-tenant control plane for cloud-native applications. Photon Platform includes VMware ESXi, Photon Controller, and Lightwave security services.

Photon Controller furnishes an API, a CLI, and a UI to manage infrastructure as a service. You can create virtual machines and Kubernetes clusters to securely run cloud-native applications and containerized workloads at scale.

1.1 Overview

Photon Controller runs on ESXi and virtual machines in ESXi. You install Photon Controller by first downloading the Photon Controller installer—an OVA that creates a VM to which you connect to deploy the system's infrastructure from a YAML configuration file.

The infrastructure of Photon Controller contains two main components:

- A management ESXi host composed of one or more virtual machines running on ESXi. The management plane allocates resources to tenants for projects.
- A cloud host that resides on an ESXi host to run your users' VMs.

For expedience, this guide installs Photon Controller on an ESXi machine that holds the management plane and the cloud host.¹ After you install the system, you can use the management plane to create tenants, resource tickets, and projects.

To help you learn how to install Photon Controller, this quick start guide proceeds in two stages: The first stage installs a basic deployment of the system, and the second stage installs a more advanced deployment that uses Lightwave authentication.²

1.2 Lightwave Authentication

Photon Controller integrates with Lightwave to help secure Photon Platform. An open source project published by VMware on GitHub, Lightwave furnishes a directory service, a certificate authority, a certificate store, and an authentication service. Lightwave authenticates users and groups with its directory service to ensure that only authorized users run authorized containers.

1.3 Assumptions

This guide assumes that an ESXi host is in place with the following attributes.³ The ESXi host can be either the licensed or the free version.

• It is running VMware ESXi 6.0.0 Patch 201611001 (ESXi600-201611001), which you can find by searching for patches for ESXi 6.0.0 on the My VMware Product Patches web site at https://my.vmware.com/group/vmware/patch.

 $^{^{1}\}mathrm{For}$ a production system, you would deploy the management plane as a cluster of 3 VMs.

²For security, you should deploy Photon Controller with authentication turned on.

³If you do not have a computer running the ESXi operating system, you can obtain ESXi at the VMware vSphere Hypervisor 6.0 Download Center. For help installing it, see the instructions at the download center and in the VMware vSphere 6 Documentation. You can also install Photon Controller on VMware Workstation or Fusion; for instructions, see the Photon Controller GitHub Wiki.

- It contains no VMs and has at least 4 CPU cores and 8 GB of RAM.
- It is assigned a static IP address.
- It contains a datastore with read-write access.
- It is not managed with vCenter.

This guide also assumes that you have root access to the ESXi host, know how to manage it with the vSphere Web Client⁴, and understand basic networking in a virtualized environment. Only minimal instructions are provided for using ESXi and its web client; if you need help, see the VMware documentation for ESXi.

1.4 Requirements

- Photon Controller version 1.1.
- A static IP address that you can use to provision the Photon Controller management node.
- A Linux workstation that can connect to virtual machines on your ESXi host to run commands with the Photon Controller command-line interface (CLI). This guide uses Ubuntu 14.04 as an example.⁵
- A second ESXi hypervisor with a static IP address that the installation will dedicate to the Lightwave authentication service. This second ESXi hypervisor can be embedded as a virtual machine in your primary ESXi host. You can download it for free from VMware.

2 Installing the Photon Controller Installation OVA

Download the installer for Photon Controller 1.1—installer-vm.ova—from the following URL and then deploy it by using the vSphere Web Client:

https://github.com/vmware/photon-controller/releases

After you download it, quickly check its checksum to make sure the entire file downloaded correctly; the checksum resides at https://github.com/vmware/photon-controller/wiki/Download.

To deploy the OVA by using the vSphere Web Client, under Navigator, right-click Host, and then click Create\Register VM. Select Deploy a virtual machine from an OVF or OVA file, click Next, enter a name for the VM, such as pc-installer, and then click in the blue box to select the OVA from the directory that you downloaded it to.

Click Next and select a datastore; the examples in this guide assume that the datastore is named datastore1.

Move through the remaining dialog boxes by clicking Next to accept the default settings, and then click Finish.

When it finishes deploying, power on the virtual machine. In a later step, you will connect to it to create the management virtual machine and the cloud host in ESXi.

3 Installing the Photon Controller CLI on a Linux Workstation

Download the file named photon-linux64 from the following URL and install it on a Linux workstation with which you can connect to your ESXi host.

https://github.com/vmware/photon-controller/releases

To install it on Ubuntu, for example, change its mode bits so that it is executable and then move it to /usr/local/bin/photon. Here's an example:

 $^{^4{\}rm The}$ v
Sphere Web Client is also known as the VM
ware ESXi Host Client.

⁵You can also install the Photon Controller CLI on a Microsoft Windows or Mac workstation; for instructions, see the Photon Controller GitHub Wiki.

```
cd ~/Downloads/
chmod +x photon-linux64
sudo mv photon-linux64 /usr/local/bin/photon
```

In a later step, you connect from the Linux workstation to the installer VM through the Photon CLI tool to run installation commands.

4 Preparing ESXi for Photon Controller

You must prepare ESXi for Photon Controller before you can proceed with the installation.

- Make sure that the default VLAN in ESXi named VM Network has available to it at least 1 unused IP address that you can assign as a static IP address. The IP address is for the VM that will act as the Photon Controller management VM.
- Make sure that the pool of IP addresses available to VM Network is large enough to support provisioning several VMs later.
- Set up an NTP source. For instructions, see the VMware vSphere documentation.
- Make sure that there are no more than two DNS entries; if there are three DNS entries, delete
 one of them by running the following commands. First, list the DNS entries: esxcli network ip
 dns server list. Second, remove one of them: esxcli network ip dns server remove --server
 <IP-address>.
- Turn on SSH: Connect to the ESXi host by using the vSphere Web Client. Under Navigator, right-click Host, click Services, and then click Enable Secure Shell (SSH).

5 Preparing a YAML Configuration File

The crux of the installation revolves around understanding the YAML installation template and configuring it with the right values for your deployment.

The YAML file is, in effect, a manifest for the installation: The installer VM uses the values in the YAML file to connect to the ESXi host, identify the correct networking settings, locate the datastore, and set up the management node and cloud host.

Understanding each field in the YAML template will help expedite the installation. This section describes the YAML template and provides an example of a completed YAML configuration file.

5.1 The Anatomy of a Configuration File

Here is a minimal template with descriptions of each key-value pair. The template contains two main sections: hosts and deployment. The hosts section specifies networking information for all the computers, or "hosts," in the cluster, including the ESXi hypervisor host and the virtual machines forming the management plane. The deployment section specifies parameters for the setup.

hosts:

- metadata:

```
MANAGEMENT_DATASTORE: <the name of a datastore on an ESXi hypervisor that the management plane will use>
MANAGEMENT_PORTGROUP: <the name of a network (VLAN or port group) on ESXi where the management VMs will reside)
MANAGEMENT_NETWORK_NETMASK: <the netmask of the network on ESXi where the management VMs reside>
MANAGEMENT_NETWORK_DNS_SERVER: <the IP address of the
```

```
DNS server of the network on ESXi to be used by the management VMs>
     MANAGEMENT_NETWORK_GATEWAY: <the IP address of the
       gateway of the network on ESXi to be used by the management VMs>
     MANAGEMENT_VM_IPS: <the static IP address for the
       management VM that the installer will create>
    address ranges: <the IP address of the ESXi host on
     which the management plane will be installed>
    username: <the name of a user with root access to the ESXi host>
    password: <the password for the user on the ESXi host>
    usage_tags:
      - MGMT
      - CLOUD
deployment:
  resume_system: true
  image_datastores:
    - datastore1
  use_image_datastore_for_vms: true
  loadbalancer enabled: false
  auth_enabled: false
```

In this minimal deployment template, the CLOUD usage tag indicates that the ESXi host will also serve as the cloud host. As a result, there is no need to add an additional metadata sequence for the cloud host.

5.2 Avoiding Errors in the Configuration File

A few of the fields in the template are error prone.

The value of the MANAGEMENT_VM_IPS key refers to the static IP address of the VM that the Photon Controller installer will deploy for the management node. The value that you add for this key should be an unused static IP address that's available to your ESXi host and reachable from the installer VM. You might need to obtain a static IP address from your network administrator.

The value of the address_ranges key refers to the IP address of your ESXi host on which you are installing Photon Controller. If you install Photon Controller across a cloud of ESXi hosts, the value of address_ranges can be the range of static IP addresses assigned to the ESXi hosts.

The value of MANAGEMENT_PORTGROUP is error prone because there are several terms that, in the context of ESXi networking as viewed through the vSphere Web Client, can seemingly refer to the same thing: network, port group, and VLAN. The default port group on an ESXi hypervisor is named VM Network, which often has a VLAN ID of 0, and VM Network is a suitable value for MANAGEMENT_PORTGROUP for a trial installation.

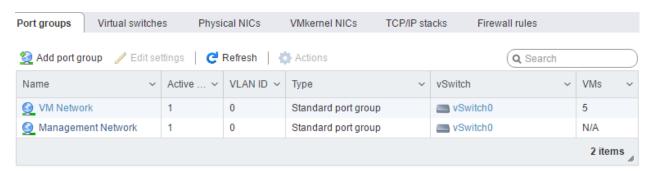


Figure 1: Port Groups in the vSphere Web Client

In this context, the term Management Network can refer to two entirely different networks:

- 1. The default ESXi management network containing the Ethernet network adapter that transmits traffic between the ESXi host and any external management software. This management network is the one shown in the image above. In the YAML template, "MANAGEMENT_NETWORK" does not refer to the ESXi Management Network.
- 2. The Photon Controller management plane, or "network," that you are setting up.

In the YAML template, therefore, the values for the MANAGEMENT_NETWORK_NETMASK, the MANAGEMENT_NETWORK _DNS_SERVER, and the MANAGEMENT_NETWORK_GATEWAY all refer to the network infrastructure that you want Photon Controller to use. To find the networking information for this infrastructure, click Host in the navigation pane of the vSphere Web Client. It displays a summary of its settings and IP addresses, as the following image illustrates.

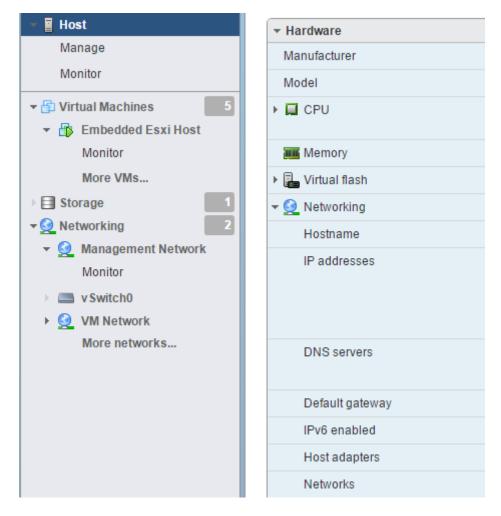


Figure 2: The ESXi Host information page in the vSphere Web Client

5.3 Example Basic Configuration File

Here is an example configuration file with the minimum information necessary for a basic deployment:

hosts:

```
- metadata:
      MANAGEMENT_DATASTORE: datastore1
      MANAGEMENT_PORTGROUP: VM Network
      MANAGEMENT_NETWORK_NETMASK: 255.255.0.0
      MANAGEMENT_NETWORK_DNS_SERVER: 198.51.100.1
      MANAGEMENT_NETWORK_GATEWAY: 198.51.100.253
      MANAGEMENT_VM_IPS: 198.51.100.191
    address ranges: 198.51.100.44
   username: root
   password: secret$1
    usage_tags:
      - CLOUD
      - MGMT
deployment:
  resume system: true
  image_datastores:
    - datastore1
  use_image_datastore_for_vms: true
  loadbalancer enabled: false
  auth_enabled: false
```

For your first test deployment, copy the template above and replace the IP addresses and the username and password with those from your ESXi host and its network. The IP address for the value of MANAGEMENT_VM_IPS should be a static IP address that is available for use by the ESXi host. Save the file as config1.yml.

You can obtain the information to fill out the template by connecting to your ESXi host with the vSphere Web Client.

6 Deploying the Basic System

You can now use the configuration file that you created to deploy a basic system from the Photon Controller CLI on your Linux workstation.

First, set the target for the Photon CLI tool by running the following command, replacing <installer_VM_ip> with the IP address of the Photon installation VM that you deployed earlier from the OVA. Add Port 9000 after the IP address.

```
photon target set http://<installer_VM_ip>:9000
```

You are now ready to deploy the Photon Controller system from your Linux workstation by running the following command:

```
photon system deploy config1.yml
```

If the deployment was unsuccessful, see the section on troubleshooting.

7 Checking the System's Status

First, change the target of the CLI tool to the static IP address of the management VM:

```
photon target set http://<management_VM_static_IP_address>:9000
```

Example:

photon target set http://198.51.100.44:9000

Second, check the system's status; example:

photon system status
Overall status: READY
Component Status
PHOTON_CONTROLLER READY

Finally, connect to the Photon Controller user interface by starting a web browser on your Linux workstation and going to the IP address of the management VM:

```
http://<mgt_ip>
```

Or, you can browse the API:

http://<mgmt_ip>:9000/api

When you're done checking the system out, you should delete it because authentication is disabled. To remove the system, run the following command in the Photon CLI on your Linux workstation:

photon system destroy

The next section demonstrates how to redeploy Photon Controller as a secured system.

8 Redeploying with Lightwave Authentication

This section shows you how to tear down the previous deployment of Photon Controller and redeploy it with Lightwave authentication. The redeployment builds on the knowledge you acquired during the first deployment.

Setting up Photon Controller with authentication requires you to add items to the YAML configuration file and to add a nested ESXi virtual machine to the ESXi host. You will also need a static IP address that you can dedicate to the VM running Lightwave.

8.1 Destroying the Previous Deployment

Before adding authentication, make sure you permanently erase the Photon Controller system that you deployed in the previous sections by running the following command in the Photon CLI on your Linux workstation:

photon system destroy

8.2 Preparing ESXi for Authentication

Deploying Photon Controller with authentication requires a second ESXi hypervisor dedicated to providing security services. For the purposes of installing Photon Controller with authentication quickly, this guide embeds a second ESXi host as a virtual machine in the primary ESXi host.

To support running the Lightwave authentication service on the nested ESXi host, you must enable promiscuous mode on the primary, physical ESXi host: In the Navigator pane of the vSphere Web Client, click Networking, click the vSwitch for VM Network (typically, vSwitch0), click Actions, click Edit Settings, expand Security, and then, for Promiscuous mode, select Accept.

The nested ESXi host has several requirements:

- 5 GB of RAM
- 150 GB of disk space
- A datastore with a different name than that of the primary ESXi host; in this example installation, the name will be datastore2. The datastore names must be unique so that each name maps to one actual datastore.
- A change to the VM's CPU settings to enable ESXi virtualization.
- SSH is enabled.

This section demonstrates how to fulfill these requirements as you install an ESXi host as a VM embedded in the primary ESXi host.

First, go to the VMware vSphere Hypervisor 6.0 Download Center and download the free version of ESXi 6.0 Update 2. Make sure it includes VMware ESXi 6.0.0 Patch 201611001 (ESXi600-201611001), which is available by searching for patches for ESXi 6.0.0 on the My VMware Product Patches web site at https://my.vmware.com/group/vmware/patch.

Second, upload the ISO for ESXi to the datastore of your primary ESXi host.⁶

Now deploy a VM for the nested ESXi host by connecting to the primary ESXi host with the vSphere Web Client:

First, under Navigator, right-click Host, and then click Create\Register VM. On the Select a creation type page, select Create a new virtual machine and click Next.

Second, on the Select a name and guest OS page, enter a name for the VM, such as Embedded ESXi Host for Auth. For the Guest OS family, select Linux. For the Guest OS version, select Other Linux (64-bit). Click Next.

Third, on the Select storage page, leave the datastore set to its default setting; click Next.

Fourth, on the Customize settings page, expand the CPU section and select Expose hardware assisted virtualization to the guest OS. Expand the Memory section and change the RAM to 5 GB. Next, change the setting for Hard disk 1 to 150 GB. For the CD/DVD Drive 1 setting, select Datastore ISO file, browse to the ESXi ISO file that you uploaded earlier, and then click Select. The ESXi ISO file name looks similar to this:

VMware-VMvisor-Installer-6.0.0-4558704.x86_64.iso

Click Next, and then click Finish.

When it finishes deploying, power on the virtual machine, enable SSH on this new nested ESXi host, and then change the name of its datastore to datastore2.

8.3 Adding Lightwave Authentication to the Template

In the example above, the value for authentication is set to false. Turning on authentication requires the following additions to the YAML configuration file:

- A second metadata subsection that describes the networking information and credentials for the Lightwave authentication service.
- A static IP address for the nested ESXi host on which the authentication service will run.
- The name of the datastore on Lightwave's ESXi host; the name of its datastore must be different from the name of the datastore used by the management VM.
- Additional entries in the deployment section for authentication.

⁶For instructions, see Upload Files to Datastores.

The new metadata section adds a key for ALLOWED_SERVICES set to Lightwave. The management VMs in this metadata sequence are dedicated to the Lightwave authentication service, and their networking information must be different from those in the metadata sequence for the management plane. Here is an example of a metadata sequence for authentication:

```
- metadata:
    ALLOWED_SERVICES: Lightwave
    MANAGEMENT_DATASTORE: datastore2
    MANAGEMENT_PORTGROUP: VM Network
    MANAGEMENT_NETWORK_NETMASK: 255.255.0.0
    MANAGEMENT_NETWORK_DNS_SERVER: 198.51.100.1
    MANAGEMENT_NETWORK_GATEWAY: 198.51.100.253
    MANAGEMENT_VM_IPS: 198.51.100.244
    address_ranges: 198.51.100.134
    username: root
    password: secret$1
    usage_tags:
    - MGMT
```

You also must add items to the deployment section for authentication:

deployment:

- CLOUD

```
resume_system: true
image datastores:
  - datastore1
  - datastore2
auth_enabled: true
oauth_tenant: 'esxcloud'
oauth_username: 'Administrator'
oauth_password: 'L1ghtWave!'
oauth_security_groups:
- "esxcloud\\Administrators"
- "esxcloud\\photonControllerAdmins"
sdn_enabled: false
stats_enabled: false
use image datastore for vms: true
loadbalancer_enabled: true
ntp endpoint: 203.0.113.1
```

Here's what the relevant key-value pairs mean:

resume_system: This setting determines whether Photon Controller should continue operating after deployment; set it to true.

auth_enabled: Setting the value of this key to true turns on authentication.

oauth_tenant: The Photon Controller security domain; it must be set to exxcloud. All letters must be lowercase.

oauth_username: The user name of the Lightwave administrator.

oauth_password: The password for the Lightwave administrator. Change the value to a strong password that you will remember.

oauth_security_groups: A list of groups whose members receive system administrator rights on Photon Controller.

8.4 Example Configuration File with Authentication

Here is an example configuration file that includes key-value pairs and sequence items for authentication.

```
hosts:
```

```
- metadata:
      MANAGEMENT_DATASTORE: datastore1
      MANAGEMENT_PORTGROUP: VM Network
      MANAGEMENT_NETWORK_NETMASK: 255.255.0.0
      MANAGEMENT_NETWORK_DNS_SERVER: 198.51.100.1
      MANAGEMENT_NETWORK_GATEWAY: 198.51.100.253
      MANAGEMENT_VM_IPS: 198.51.100.46
    address_ranges: 198.51.100.44
   username: root
   password: Secret$1
   usage_tags:
      - MGMT
      - CLOUD
  - metadata:
      ALLOWED SERVICES: Lightwave
      MANAGEMENT_DATASTORE: datastore2
      MANAGEMENT_PORTGROUP: VM Network
      MANAGEMENT_NETWORK_NETMASK: 255.255.0.0
      MANAGEMENT_NETWORK_DNS_SERVER: 198.51.100.1
      MANAGEMENT_NETWORK_GATEWAY: 198.51.100.253
      MANAGEMENT_VM_IPS: 198.51.100.244
    address_ranges: 198.51.100.134
    username: root
   password: secret1
   usage_tags:
      - MGMT
      - CLOUD
deployment:
  resume_system: true
  image datastores:
    - datastore1
   - datastore2
  auth_enabled: true
  oauth_tenant: 'esxcloud'
  oauth_username: 'Administrator'
  oauth_password: 'L1ghtWave!'
  oauth_security_groups:
  - "esxcloud\\Administrators"
  - "esxcloud\\photonControllerAdmins"
  sdn_enabled: false
  stats_enabled: false
  use_image_datastore_for_vms: true
  loadbalancer_enabled: true
  ntp_endpoint: 203.0.113.1
```

8.5 Building Your Configuration File and Deploying Photon Controller

Armed with these examples of how to add authentication to the YAML template, you can now rename your original deployment file config2.yml and modify it to include authentication. Or you can use the example

configuration in the previous section as a template for your deployment. Replace the IP addresses, usernames, passwords, and datastore names in the template with those from your environment.

After you complete your YAML file, deploy it from your Linux workstation:

```
photon target set http://<installer_VM_ip>:9000
photon system deploy config2.yml
```

If the deployment was unsuccessful, see the section on troubleshooting.

9 Creating Accounts in Lightwave

After you deploy Photon Controller with authentication, you must log in to the Lightwave service and create a Photon Controller system administrators group that contains a user. When you're done, the authenticated user can create tenants, projects, and users on Photon Controller.

First, find the end point IP address of the Lightwave container by running the following commands with the Photon CLI on your Linux workstation:

```
photon deployment show
```

Connect to the Lightwave VM with SSH; the default password is vmware:

```
ssh esxcloud@<IPaddressOfAuthEndPoint>
```

Connect to the Lightwave container:

```
docker exec -it Lightwave bash
```

Change directories:

```
cd /opt/vmware/bin
```

Using the password defined in the oauth_password key of your deployment template (L1ghtwave! in the example), run the following Lightwave directory commands to create a group, create a user, and add the user to the group.⁷

```
./dir-cli ssogroup create --name "photonControllerAdmins"
./dir-cli user create --account pc-admin --user-password 'Your$ecret1!'
--first-name pc --last-name admin
./dir-cli group modify --name photonControllerAdmins --add pc-admin
```

Type exit to leave the container, and then type exit again to leave the SSH session.

10 Connecting to the Load Balancer

After the installer deploys Photon Controller and you created a security group in Lightwave, you can connect to the load balancer to create tenants, resource tickets, and projects.

First, find the load balancer's IP address by running the following commands with the Photon CLI on your Linux workstation:

```
photon deployment show
```

Since you deployed Photon Controller with authentication, you must connect to the IP address of the load balancer by appending Port 443:

```
photon target set -c https://cproduction_system_ip>:443
```

⁷The second command in the series should be run as one line; here it wraps onto a second line to fit the page.

And then you can log in by using the pc-admin account at oauth_tenant that you created in the Lightwave directory. Lightwave authenticates the user.

```
photon target login --username pc-admin@<oauth_tenant> --password 'Your$ecret1!'
```

Here is an example. In the sample YAML file, the oauth_tenant is set to esxcloud—so <oauth_tenant> is replaced with esxcloud:⁸

```
photon target login --username pc-admin@esxcloud --password 'Your$ecret1!'
```

Finally, check your work:

photon system status
Overall status: READY
Component Status
PHOTON_CONTROLLER READY

As the status says, you're now ready to work with the system.

11 Creating a Kubernetes Cluster

To see the power of Photon Controller, you can create a Kubernetes cluster. For instructions, see Creating a Kubernetes Cluster on the Photon Controller GitHub wiki.

12 Troubleshooting

If Photon Controller fails to install successfully, clean up the unsuccessful installation by destroying it before you try again:

```
photon system destroy
```

You can then troubleshoot by looking at the installer's logs. The most likely cause of a failure is that IP addresses assigned to a VM in the Photon Controller management plane are in use, unavailable, or unreachable.

12.1 Log Files for the Installer

The log files for the deployment reside in the following directory on the Photon Controller installer VM:

• /var/log/esxcloud/photon-controller-core/

The log files for the Photon Controller agent, which is installed on the ESXi host, reside in the following directory of the target ESXi host:

• /scratch/log/photon-controller-agent.log

12.2 Deploying the OVA Installer

If you get a failure screen when you deploy the OVA by using the vSphere Web Client, download and install the latest VIB for the web client from this URL:

https://labs.vmware.com/flings/esxi-embedded-host-client

⁸If you set oauth-tenant to something other than esxcloud, make sure all the letters are lowercase.

12.3 Lightwave Authentication and NTP

Because Lightwave authenticates users and groups by using the Kerberos security protocol, the time on the VM running Lightwave must be synchronized with the time on VMs that are authenticating with Lightwave.

More specifically, the clock of the client must be within the Lightwave key distribution center's maximum clock skew, which is 300 seconds, or 5 minutes, by default. Lightwave discards authentication requests outside the maximum clock skew to help prevent replay attacks. See MIT Kerberos Clock Skew.

Implementing an NTP server for the ESXi host synchronizes clocks across virtual machines to avoid Kerberos clock-skew errors.