A Step-by-Step Guide to Installing OpenStack on CentOS Using the KVM Hypervisor and GlusterFS Distributed File System

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Contents

1	1 Introduction						
2	Comparison of Open Source Cloud Platforms						
3	Ove	Overview of the OpenStack Cloud Platform					
4	Exi	sting (OpenStack Installation Tools	3			
5	Ste	p-by-S	tep OpenStack Installation	3			
	5.1	Hardy	vare Setup	3			
	5.2	Organization of the Installation Package					
	5.3	3 Configuration Files					
	5.4	Installation Procedure					
		5.4.1	CentOS Installation	5			
		5.4.2	Network Gateway	8			
		5.4.3	GlusterFS Distributed Replicated Storage	10			
		5.4.4	KVM	13			
		5.4.5	OpenStack	15			
	5.5 OpenStack Troubleshooting						
6	Cor	nclusio	n	34			

7 References 34

1 Introduction

- Cloud Computing [1], [2]
- Public / Private / Hybrid
- Why Open Source Cloud Platforms are Important
- OpenStack / Eucalyptus / CloudStack / OpenNebula
- Complexity of Installing OpenStack
- Our Step-by-Step Scripted Installation Approach
- The purpose is not just having an up and running OpenStack installation, but also learning the steps required to perform the installation from the ground up and understanding the responsibilities and interaction of the OpenStack components.

2 Comparison of Open Source Cloud Platforms

- OpenStack
- Eucalyptus
- CloudStack
- OpenNebula

3 Overview of the OpenStack Cloud Platform

- History
- Features
- Main Services
- Service Interaction

4 Existing OpenStack Installation Tools

- DevStack¹
- Puppet / Chef²
- Difference From our Approach

5 Step-by-Step OpenStack Installation

5.1 Hardware Setup

The testbed used for testing the installation scripts consists of the following hardware:

- 1 x Dell Optiplex 745
 - Intel(R) Core(TM)2 CPU (2 cores, 2 threads) 6600 @ 2.40GHz
 - 2GB DDR2-667
 - Seagate Barracuda 80GB, 7200 RPM SATA II (ST3808110AS)
 - Broadcom 5751 NetXtreme Gigabit Controller
- \bullet 4 x IBM System x3200 M3
 - Intel(R) Xeon(R) CPU (4 cores, 8 threads), X3460 @ 2.80GHz
 - 4GB DDR3-1333
 - Western Digital 250 GB, 7200 RPM SATA II (WD2502ABYS-23B7A)
 - Dual Gigabit Ethernet (2 x Intel 82574L Ethernet Controller)
- 1 x Netgear ProSafe 16-Port 10/100 Desktop Switch FS116

The Dell Optiplex 745 machine has been chosen to serve as a management host running all the major OpenStack services. The management host is referred to as the *controller* further in the text. The 4 IBM System x3200 M3 servers are used as *compute hosts*, i.e. for hosting VM instances.

Due to specifics of our setup, the only one machine connected to public network and the Internet is one of the IBM System x3200 M3 servers. This server is referred to as the *gateway*. The gateway is connected to the public network via the eth0 network interface.

¹Http://devstack.org/.

 $^{^2} Http://docs.openstack.org/trunk/openstack-compute/admin/content/openstack-compute-deployment-tool-with-puppet.html.$

All the machines form a local network connected through the Netgear FS116 network switch. The compute hosts are connected to the local network via their eth1 network interfaces. The controller is connected to the local network through its eth0 interface. To provide the access to the public network and the Internet, the gateway performs Network Address Translation (NAT) for the hosts from the local network.

5.2 Organization of the Installation Package

The project contains a number of directories, whose organization is explained in this section. The config directory includes configuration files, which are used by the installation scripts and should be modified prior to the installation. The lib directory contains utility scripts that are shared by the other installation scripts. The doc directory comprises the source and compiled versions of the documentation.

The remaining directories directly include the step-by-step installation scripts. The names of these directories have a specific format. The prefix (before the first dash) is the number denoting the order of execution. For example, the scripts from the directory with the prefix θ 1 must be executed first, followed by the scripts from the directory with the prefix θ 2, etc. The middle part of a directory name denotes the purpose of the scripts in this directory. The suffix (after the last dash) specifies the host, on which the scripts from this directory should be executed on. There are 4 possible values of the target host prefix:

- *all* execute the scripts on all the hosts;
- compute execute the scripts on all the compute hosts;
- controller execute the scripts on the controller;
- qateway execute the scripts on the gateway.

For example, the first directory is named 01-network-gateway, which means that (1) the scripts from this directory must be executed in the first place; (2) the scripts are supposed to do a network set up; and (3) the scripts must be executed only on the gateway. The name 02-glusterfs-all means: (1) the scripts from this directory must be executed after the scripts from 01-network-gateway; (2) the scripts set up GlusterFS; and (3) the scripts must be executed on all the hosts.

The names of the installation scripts themselves follow a similar convention. The prefix denotes the order, in which the scripts should be run, while the remaining part of the name describes the purpose of the script.

5.3 Configuration Files

The lib directory contains configuration files used by the installation scripts. These configuration files should be modified prior to running the installation scripts. The configuration files are described below.

configre: This files contains a number of environmental variables defining various aspects of OpenStack's configuration, such as administration and service account credentials, as well as access points. The file must be "sourced" to export the variables into the current shell session. The file can be sourced directly by running: . configre, or using the scripts described later. A simple test to check whether the variables have been correctly exported is to echo any of the variables. For example, echo \$OS_USERNAME must output admin for the default configuration.

hosts: This files contains a mapping between the IP addresses of the hosts in the local network and their host names. We apply the following host name convention: the compute hosts are named *computeX*, where X is replaced by the number of the host. According the described hardware setup, the default configuration defines 1 controller (192.168.0.1), and 4 compute hosts: compute1 (192.168.0.1), compute2 (192.168.0.2), compute3 (192.168.0.3), compute4 (192.168.0.4). As mentioned above, in our setup one of the compute hosts is connected to the public network and acts as a gateway. We assign to this host the host name compute1, and also alias it as gateway.

ntp.conf: This files contains a list of Network Time Protocol (NTP) servers to use by all the hosts. It is important to set accessible servers, since time synchronization is important for OpenStack services to interact correctly. By default, this file defines servers used within the University of Melbourne. It is advised to replace the default configuration with a list of preferred servers.

It is important to replaced the default configuration defined in the described configuration files, since the default configuration is tailored to the specific setup of our testbed.

5.4 Installation Procedure

5.4.1 CentOS Installation

The installation scripts have been tested with CentOS 6.3^3 , which has been installed on all the hosts. The CentOS installation mainly follows the standard

³Http://www.centos.org/.

process described in detail in the Red Hat Enterprise Linux 6 Installation Guide [3]. The steps of the installation process that differ from the standard are discussed in this section.

Network Configuration. The simplest way to configure network is during the OS installation process. As mentioned above, in our setup, the gateway is connected to two networks: to the public network through the eth0 interface; and to the local network through the eth1 interface. Since in our setup the public network configuration can be obtain from a DHCP server, in the configuration of the eth0 interface it is only required to enable automatic connection by enabling the "Connect Automatically" option. We use static configuration for the local network; therefore, eth1 has be configured manually. Apart from enabling the "Connect Automatically" option, it is necessary to configure IPv4 by adding an IP address and netmask. According to the configuration defined in the hosts file described above, we assign 192.168.0.1/24 to the gateway.

One difference in the network configuration of the other compute hosts (compute2, compute3, and compute4) from the gateway is that eth0 should be kept disabled, as it is unused. The eth1 interface should be enabled by turning on the "Connect Automatically" option. The IP address and netmask for eth1 should be set to 192.168.0.X/24, where X is replaced by the compute host number. The gateway for the compute hosts should be set to 192.168.0.1, which the IP address of the gateway host. The controller is configured similarly to the compute hosts with the only difference that the configuration should be done for eth0 instead of eth1, since the controller has only one network interface.

Hard Drive Partitioning. The hard drive partitioning scheme is the same for all the compute hosts, but differs for the controller. Table 1 shows the partitioning scheme for the compute hosts. vg_base is a volume group comprising the standard Operating System (OS) partitions: lv_root, lv_home and lv_swap. vg_gluster is a special volume group containing a single lv_gluster partition, which is dedicated to serve as a GlusterFS brick. The lv_gluster logical volume is formatted using the XFS⁴ file system, as recommended for GlusterFS bricks.

⁴Http://en.wikipedia.org/wiki/XFS.

Device	Size (MB)	Mount Point / Volume	Type
LVM Volume Groups			
vg_base	20996		
lv_root	10000	/	ext4
lv_swap	6000		swap
lv_home	4996	/home	ext4
$vg_gluster$	216972		
$lv_gluster$	216972	/export/gluster	xfs
Hard Drives			
sda			
sda1	500	/boot	ext4
sda2	21000	vg_base	PV (LVM)
sda3	216974	$vg_gluster$	PV (LVM)

Table 1: Partitioning scheme for the compute hosts

Table 2 shows the partitioning scheme for the controller. It does not include a vg_gluster volume group since the controller is not going to be a part of the GlusterFS volume. However, the scheme includes two new important volume groups: nova-volumes and vg_images. The nova-volumes volume group is used by OpenStack Nova to allocated volumes for VM instances. This volume group is managed by Nova; therefore, there is not need to create logical volumes manually. The vg_images volume group and its lv_images logical volume are devoted for storing VM images by OpenStack Glance. The mount point for lv_images is /var/lib/glance/images, which is the default directory used by Glance to store image files.

Device	Size (MB)	Mount Point / Volume	Type
LVM Volume Groups			
nova-volumes	29996		
Free	29996		
vg_base	16996		
lv_root	10000	/	ext4
lv_swap	2000		swap
lv_home	4996	/home	ext4
vg_images	28788		
lv_images	28788	$/{\rm var/lib/glance/images}$	ext4
Hard Drives			
sda			
sda1	500	/boot	ext4
sda2	17000	vg_base	PV (LVM)
sda3	30000	nova-volumes	PV (LVM)
sda4	28792		Extended
sda5	28788	vg_images	PV (LVM)

Table 2: Partitioning scheme for the controller

5.4.2 Network Gateway

Once CentOS is installed on all the machines, the next step is to configure NAT on the gateway to enable the Internet access on all the hosts. First, it is necessary to check whether the Internet is available on the gateway itself. If the Internet is not available, the problem might be in the configuration of eth0, the network interface connected to the public network in our setup.

In all the following steps, it is assumed that the user logged in is root. If the Internet is available on the gateway, it is necessary to install Git⁵ to be able to clone the repository containing the installation scripts. This can be done using yum, the default package manager in CentOS, as follows:

yum install -y git

Next, the repository can be clone using the following command:

⁵Http://en.wikipedia.org/wiki/Git_(software).

git clone https://github.com/beloglazov/openstack-centos-kvm-glusterfs.git

Then, we can proceed to continue the configuration using the scripts contained in the cloned Git repository. As described above, the starting point is the directory called O1-network-gateway.

cd openstack-centos-kvm-glusterfs/01-network-gateway

All the scripts described below can be run by executing ./<script name>.sh on the command line.

(1) 01-iptables-nat.sh

This script flushes all the default iptables rules to open all ports. This is acceptable for testing; however, it is not recommended for production environments due to security concerns. Then, the script sets up NAT using iptables by forwarding packets from eth1 (the local network interface) through eth0. The last stage is saving the defined iptables rules restarting the service.

```
# Flush the iptables rules.
iptables -F
iptables -t nat -F
iptables -t mangle -F

# Set up packet forwarding for NAT
iptables -t nat -A POSTROUTING -o eth0 -j MASQUERADE
iptables -A FORWARD -i eth1 -j ACCEPT
iptables -A FORWARD -o eth1 -j ACCEPT

# Save the iptables configuration into a file and restart iptables
service iptables save
service iptables restart

(2) 02-ip-forward.sh
```

By default, IP packet forwarding is disabled in CentOS; therefore, it is necessary to enable it by modifying the /etc/sysctl.conf configuration file. This is done by the O2-ip-forward.sh script as follows:

```
# Enable IP packet forwarding
sed -i 's/net.ipv4.ip_forward = 0/net.ipv4.ip_forward = 1/g' \
    /etc/sysctl.conf
# Restart the network service
service network restart
```

(3) 03-copy-hosts.sh

This script copies the hosts file from the config directory to /etc locally, as well to all the other hosts: the remaining compute hosts and the controller. The hosts files defines a mapping between the IP addresses of the hosts and host names. For convenience, prior to copying you may use the ssh-copy-id program to copy the public key to the other hosts for password-less SSH access. Once the hosts file is copied to all the hosts, they can be accessed by using their respective host names instead of the IP addresses.

```
# Copy the hosts file into the local configuration
cp ../config/hosts /etc/

# Copy the hosts file to the other nodes.
scp ../config/hosts root@compute2:/etc/
scp ../config/hosts root@compute3:/etc/
scp ../config/hosts root@compute4:/etc/
scp ../config/hosts root@controller:/etc/
```

From this point, all the installation steps on any host can be performed remotely over SSH.

5.4.3 GlusterFS Distributed Replicated Storage

In this section, we describe how to set up distributed replicated storage using GlusterFS.

02-glusterfs-all (all nodes) The steps discussed in this section need to be run on all the hosts. The easiest way to manage multi-node installation is to SSH into all the hosts from another machine using separate terminals. This way the hosts can be conveniently managed from a single machine. Before applying further installation, it is necessary to run the following commands:

```
yum update -y
yum install -y git
git clone https://github.com/beloglazov/openstack-centos-kvm-glusterfs.git
```

It is optional but might be useful to install other programs on all the hosts, such as man, nano, or emacs for reading manuals and editing files.

```
(4) 01-iptables-flush.sh
```

This script flushes all the default **iptables** rules to allow connections through all the ports. As mentioned above, this is insecure and not recommended for production environments. For production it is recommended to open the specific required ports.

```
# Flush the iptables rules.
iptables -F

# Save the configuration and restart iptables
service iptables save
service iptables restart
```

(5) 02-selinux-permissive.sh

This script switches SELinux⁶ into the permissive mode. By default, SELinux blocks certain operations, such as VM migrations. Switching SELinux into the permissive mode is not recommended for production environments, but is acceptable for testing purposes.

```
# Set SELinux into the permissive mode
sed -i 's/SELINUX=enforcing/SELINUX=permissive/g' /etc/selinux/config
echo 0 > /selinux/enforce
```

(6) 03-glusterfs-install.sh

This script installs GlusterFS services and their dependencies.

```
# Install GlusterFS and its dependencies
yum -y install \
    openssh-server wget fuse fuse-libs openib libibverbs \
    http://download.gluster.org/pub/gluster/glusterfs/LATEST/CentOS/glusterfs-3.3.0-1.el6.x%
    http://download.gluster.org/pub/gluster/glusterfs/LATEST/CentOS/glusterfs-fuse-3.3.0-1.el6.x%
    http://download.gluster.org/pub/gluster/glusterfs/LATEST/CentOS/glusterfs-server-3.3.0-1.el6.x%
```

(7) 04-glusterfs-start.sh

This script starts the GlusterFS service, and sets the service to start during the system start up.

```
# Start the GlusterFS service
service glusterd restart
chkconfig glusterd on
```

⁶Http://en.wikipedia.org/wiki/Security-Enhanced_Linux.

03-glusterfs-controller (controller) The scripts described in this section need to be run only on the controller.

(8) 01-glusterfs-probe.sh

This script probes the compute hosts to add them to a GlusterFS cluster.

```
# Probe GlusterFS peer hosts
gluster peer probe compute1
gluster peer probe compute2
gluster peer probe compute3
gluster peer probe compute4
```

(9) 02-glusterfs-create-volume.sh

This scripts creates a GlusterFS volume out of bricks exported by the compute hosts mounted to <code>/export/gluster</code> for storing VM instances. The created GlusterFS volume is replicated across all the 4 compute hosts. Such replication provides fault tolerance, as if any of the compute hosts fail, the VM instance data will be available from the remaining replicas. Compared to a Network File System (NFS) exported by a single server, the complete replication provided by GlusterFS improves the read performance, since all the read operations are local. This is important to enable efficient live migration of VMs.

```
# Create a GlusterFS volume replicated over 4 gluster hosts
gluster volume create vm-instances replica 4 \
        compute1:/export/gluster compute2:/export/gluster \
        compute3:/export/gluster compute4:/export/gluster
# Start the created volume
gluster volume start vm-instances
```

04-glusterfs-all (all nodes) The script described in this section needs to be run on all the hosts.

(10) 01-glusterfs-mount.sh

This scripts adds a line to the /etc/fstab configuration file to automatically mount the GlusterFS volume during the system start up to the /var/lib/nova/instances directory. The /var/lib/nova/instances directory is the default location where OpenStack Nova stores the VM instances related data. This directory must be shared be all the compute hosts to enable live migration of VMs. The mount -a command re-mounts everything from the config file after it has been modified.

5.4.4 KVM

The scripts included in the O5-kvm-compute directory need to be run on the compute hosts. KVM is not required on the controller, since it is not going to be used to host VM instances.

Prior to enabling KVM on a machine, it is important to make sure that the machine uses either Intel VT or AMD-V chipsets that support hardware-assisted virtualization. This feature might be disabled in the Basic Input Output System (BIOS); therefore, it is necessary to verify that it is enabled. To check whether hardware-assisted virtualization is supported by the hardware, the following Linux command can be used:

```
grep -E 'vmx|svm' /proc/cpuinfo
```

If the command returns any output, it means that the supports hardware-assisted virtualization. The vmx processor feature flag represents an Intel VT chipset, whereas the svm flag represents AMD-V. Depending on the flag returned, you need to modify the O2-kvm-modprobe.sh script.

```
(11) 01-kvm-install.sh
```

This script installs KVM and the related tools.

```
 \begin{tabular}{llll} \it{# Install KVM and the related tools} \\ \it{yum -y install kvm qemu-kvm qemu-kvm-tools} \\ \end{tabular}
```

(12) 02-kvm-modprobe.sh

This script enables KVM in the OS. If the grep -E 'vmx|svm' /proc/cpuinfo command described above returned vmx, there is no need to modify this script, as it enables the Intel KVM module by default. If the command returned svm, it is necessary to comment the modprobe kvm-intel line and uncomment the modprobe kvm-amd line.

```
# Create a script for enabling the KVM kernel module
echo "
```

```
modprobe kvm
# Uncomment this line if the host has an AMD CPU
#modprobe kvm-amd
# Uncomment this line if the host has an Intel CPU
modprobe kvm-intel
" > /etc/sysconfig/modules/kvm.modules
chmod +x /etc/sysconfig/modules/kvm.modules
# Enable KVM
/etc/sysconfig/modules/kvm.modules
(13) 03-libvirt-install.sh
This script installs Libvirt<sup>7</sup>, its dependencies and the related tools. Libvirt
provides an abstraction and a common Application Programming Interface
(API) over various hypervisors. It is used by OpenStack to provide support for
multiple hypervisors. After the installation, the script starts the messagebus
and avahi-daemon services, which are prerequisites of Libvirt.
# Install libvirt and its dependecies
yum -y install libvirt libvirt-python python-virtinst avahi dmidecode
# Start the services required by livirt
service messagebus restart
service avahi-daemon restart
# Start the service during the system start up
chkconfig messagebus on
chkconfig avahi-daemon on
(14) 04-libvirt-config.sh
This script modifies the Libvirt configuration to enable communication over TCP.
This is required by OpenStack to enable live migration of VM instances.
# Enable the communication with libuirt over TCP without
```

/etc/libvirt/libvirtd.conf

migration through OpenStack.

sed -i 's/#listen_tls = 0/listen_tls = 0/g' \

authentication. This configuration is required to enable live

⁷Http://en.wikipedia.org/wiki/Libvirt.

```
sed -i 's/#listen_tcp = 1/listen_tcp = 1/g' \
    /etc/libvirt/libvirtd.conf
sed -i 's/#auth_tcp = "sasl"/auth_tcp = "none"/g' \
    /etc/libvirt/libvirtd.conf
sed -i 's/#LIBVIRTD_ARGS="--listen"/LIBVIRTD_ARGS="--listen"/g' \
    /etc/sysconfig/libvirtd
```

(15) 05-libvirt-start.sh

This script starts the libvirtd service and sets it to automatically start during the system start up.

```
# Start the libvirt service
service libvirtd restart
chkconfig libvirtd on
```

5.4.5 OpenStack

This section contains a few subsection describing different phases of OpenStack installation.

06-openstack-all (all nodes) The scripts described in this section need to be executed on all the hosts.

```
(16) 01-epel-add-repo.sh
```

This scripts adds the Extra Packages for Enterprise Linux⁸ (EPEL) repository, which contains the OpenStack related packages.

```
# Add the EPEL repo: http://fedoraproject.org/wiki/EPEL
yum install -y \
    http://dl.fedoraproject.org/pub/epel/6/i386/epel-release-6-7.noarch.rpm
```

(17) 02-ntp-install.sh

This script install the NTP service, which is required to automatically synchronize the time with external NTP servers.

```
# Install NTP
yum install -y ntp
```

 $^{^8 {\}rm Http://fedoraproject.org/wiki/EPEL}.$

(18) 03-ntp-config.sh

This script replaces the default servers specified in the /etc/ntp.conf configuration file with the servers specified in the config/ntp.conf file described above. If the default set of servers is satisfactory, then the execution of this script is not required.

```
# Fetch the NTP servers specified in ../config/ntp.conf
SERVER1='cat ../config/ntp.conf | sed '1!d;q''
SERVER2='cat ../config/ntp.conf | sed '2!d;q''
SERVER3='cat ../config/ntp.conf | sed '3!d;q''
# Replace the default NTP servers with the above
sed -i "s/server 0.*pool.ntp.org/$SERVER1/g" /etc/ntp.conf
sed -i "s/server 1.*pool.ntp.org/$SERVER2/g" /etc/ntp.conf
sed -i "s/server 2.*pool.ntp.org/$SERVER3/g" /etc/ntp.conf
```

(19) 04-ntp-start.sh

This script starts the ntpdate service and sets it to start during the system start up. Upon the start, the ntpdate service synchronizes the time with the servers specified in the /etc/ntp.conf configuration file.

```
# Start the NTP service
service ntpdate restart
chkconfig ntpdate on
```

07-openstack-controller (controller) The scripts described in this section need to be run only on the controller host.

(20) 01-source-configrc.sh

This scripts is mainly used to remind of the necessity to "source" the configro file prior to continuing, since some scripts in this directory use the environmental variable defined in configre. To source the file, it is necessary to run the following command . 01-source-configrc.sh.

```
echo "To make the environmental variables available \
    in the current session, run: "
echo ". 01-source-configrc.sh"
# Export the variables defined in ../config/configrc
. ../config/configro
```

(21) 02-mysql-install.sh

This script installs the MySQL server, which is required to host the databases used by the OpenStack services.

```
# Install the MySQL server
yum install -y mysql mysql-server
```

(22) 03-mysql-start.sh

This script start the MySQL service and initializes the password of the root MySQL user using the variable from the configro file called \$MYSQL_ROOT_PASSWORD.

```
# Start the MySQL service
service mysqld start
chkconfig mysqld on

# Initialize the MySQL root password
mysqladmin -u root password $MYSQL_ROOT_PASSWORD

echo ""
echo "The MySQL root password has been set \
    to the value of $MYSQL_ROOT_PASSWORD: \"$MYSQL_ROOT_PASSWORD\""
```

(23) 04-keystone-install.sh

This script installs Keystone - the OpenStack identity management service, and other OpenStack command line utilities.

```
\# Install OpenStack utils and Keystone - the identity management service yum install -y openstack-utils openstack-keystone
```

(24) 05-keystone-create-db.sh

This script creates a MySQL database for Keystone called keystone, which is used to store various identity data. The script also creates a keystone user and grants full permissions to the keystone database to this user.

(25) 06-keystone-generate-admin-token.sh

This script generates a random token used to authorize the Keystone admin account. The generated token is stored in the ./keystone-admin-token file.

```
# Generate an admin token for Keystone and save it into # ./keystone-admin-token openssl rand -hex 10 > keystone-admin-token
```

(26) 07-keystone-config.sh

This script modifies the configuration file of Keystone, /etc/keystone/keystone.conf. It sets the generated admin token and the MySQL connection configuration using the variables defined in configre.

```
# Set the generated admin token in the Keystone configuration
openstack-config --set /etc/keystone/keystone.conf DEFAULT \
    admin_token 'cat keystone-admin-token'

# Set the connection to the MySQL server
openstack-config --set /etc/keystone/keystone.conf sql \
    connection mysql://keystone:$KEYSTONE_MYSQL_PASSWORD@controller/keystone
```

(27) 08-keystone-init-db.sh

This script initializes the keystone database using the keystone-manage command line tool. The executed command creates tables in the database.

```
# Initialize the database for Keystone
keystone-manage db_sync
```

(28) 09-keystone-permissions.sh

This script sets restrictive permissions (640) on the Keystone configuration file, since it contains the MySQL account credentials and the admin token. Then, the scripts sets the ownership of the Keystone related directories to the keystone user and keystone group.

```
# Set restrictive permissions on the Keystone config file
chmod 640 /etc/keystone/keystone.conf

# Set the ownership for the Keystone related directories
chown -R keystone:keystone /var/log/keystone
chown -R keystone:keystone /var/lib/keystone
```

(29) 10-keystone-start.sh

This script starts the Keystone service and sets it to automatically start during the system start up.

```
# Start the Keystone service
service openstack-keystone restart
chkconfig openstack-keystone on
```

(30) 11-keystone-create-users.sh

The purpose of this script is to create user accounts, roles and tenants in Keystone for the admin user and service accounts for each OpenStack service: Keystone, Glance, and Nova. Since the process is complicated when done manually (it is necessary to define relations between database records), we use the *keystone-init* project of automate the process. The *keystone-init* project allows one to create a configuration file in the "YAML Ain't Markup Language" (YAML) data format defining the required OpenStack user accounts. Then, according the defined configuration, the required database are automatically created.

Our script first installs a dependency of *keystone-init* and clones the project's repository. Then, the script modifies the default configuration file provided with the *keystone-init* project by populating it with the values defined by the environmental variables defined in configre. The last step of the script is to invoke *keystone-init*. The script does not remove the *keystone-init* repository to allow one to browse the generated configuration file, e.g. to check the correctness. When the repository is not required anymore, it can be removed by executing rm -rf keystone-init.

 $^{^9 \}mathrm{Https://github.com/nimbis/keystone-init.}$

¹⁰Http://en.wikipedia.org/wiki/YAML.

```
$0S_USERNAME/g" \
sed -i "s/name:
                    adminUser/name:
    keystone-init/config.yaml
sed -i "s/password: secretword/password: $OS_PASSWORD/g" \
    keystone-init/config.yaml
sed -i "s/name:
                    glance/name:
                                     $GLANCE_SERVICE_USERNAME/g" \
    keystone-init/config.yaml
sed -i "s/password: glance/password: $GLANCE_SERVICE_PASSWORD/g" \
    keystone-init/config.yaml
sed -i "s/name:
                                   $NOVA SERVICE USERNAME/g" \
                    nova/name:
   keystone-init/config.yaml
sed -i "s/password: nova/password: $NOVA_SERVICE_PASSWORD/g" \
    keystone-init/config.yaml
sed -i "s/RegionOne/$OS_REGION_NAME/g" \
    keystone-init/config.yaml
# Run the Keystone initialization script
./keystone-init/keystone-init.py ./keystone-init/config.yaml
echo ""
echo "The applied config file is keystone-init/config.yaml"
echo "You may do 'rm -rf keystone-init' to remove \
    the no more needed keystone-init directory"
(31) 12-glance-install.sh
```

This script install Glance – the OpenStack VM image management service.

```
# Install OpenStack Glance -- an image management service
yum install -y openstack-glance
```

(32) 13-glance-create-db.sh

This script creates a MySQL database for Glance called glance, which is used to store VM image metadata. The script also creates a glance user and grants full permissions to the glance database to this user.

```
# Create a database for Glance
../lib/mysqlq.sh "CREATE DATABASE glance;"
# Create a glance user and grant all privileges
# to the glance database
../lib/mysqlq.sh "GRANT ALL ON glance.* TO 'glance'@'controller' \
   IDENTIFIED BY '$GLANCE_MYSQL_PASSWORD';"
```

(33) 14-glance-config.sh

This scripts modifies the configuration files of the Glance services, which include the API and Registry services. Apart from various credentials, the script also sets Keystone as the identity management service used by Glance.

```
# Make Glance API use Keystone as the identity management service
openstack-config --set /etc/glance/glance-api.conf paste_deploy \
    flavor keystone
# Set Glance API user credentials
openstack-config --set /etc/glance/glance-api-paste.ini filter:authtoken \
    admin_tenant_name $GLANCE_SERVICE_TENANT
openstack-config --set /etc/glance/glance-api-paste.ini filter:authtoken \
    admin_user $GLANCE_SERVICE_USERNAME
openstack-config --set /etc/glance/glance-api-paste.ini filter:authtoken \
    admin_password $GLANCE_SERVICE_PASSWORD
# Set Glance Cache user credentials
openstack-config --set /etc/glance/glance-cache.conf DEFAULT \
    admin_tenant_name $GLANCE_SERVICE_TENANT
openstack-config --set /etc/glance/glance-cache.conf DEFAULT \
    admin_user $GLANCE_SERVICE_USERNAME
openstack-config --set /etc/glance-glance-cache.conf DEFAULT \
    admin_password $GLANCE_SERVICE_PASSWORD
# Make Glance Registry use Keystone as the identity management service
openstack-config --set /etc/glance/glance-registry.conf paste_deploy \
    flavor keystone
# Set the connection to the MySQL server
openstack-config --set /etc/glance/glance-registry.conf DEFAULT \
    sql_connection mysql://glance:$GLANCE_MYSQL_PASSWORD@controller/glance
# Set Glance Registry user credentials
openstack-config --set /etc/glance/glance-registry-paste.ini filter:authtoken \
    openstack-config --set /etc/glance/glance-registry-paste.ini filter:authtoken \
    admin_user $GLANCE_SERVICE_USERNAME
openstack-config --set /etc/glance/glance-registry-paste.ini filter:authtoken \
    admin_password $GLANCE_SERVICE_PASSWORD
(34) 15-glance-init-db.sh
```

This scripts initializes the glance database using the glance-manage command line tool.

```
# Initialize the database for Glance
glance-manage db_sync
```

(35) 16-glance-permissions.sh

This scripts sets restrictive permissions (640) on the Glance configuration files, since they contain sensitive information. The script also set the ownership of the Glance related directories to the glance user and glance group.

```
# Set restrictive permissions for the Glance config files
chmod 640 /etc/glance/*.conf
chmod 640 /etc/glance/*.ini

# Set the ownership for the Glance related directories
chown -R glance:glance /var/log/glance
chown -R glance:glance /var/lib/glance
(36) 17-glance-start.sh
```

This script starts the Glance services: both API and Registry. The script sets the services to automatically start during the system start up.

```
# Start the Glance Registry and API services
service openstack-glance-registry restart
service openstack-glance-api restart
chkconfig openstack-glance-registry on
chkconfig openstack-glance-api on
```

(37) 18-add-cirros.sh

This script downloads the Cirros VM image¹¹ and imports it into Glance. This image is very simplistic: its size is just 9.4 MB; however, it is sufficient for testing OpenStack.

```
disk_format=qcow2 container_format=bare < cirros-0.3.0-x86_64-disk.img
```

```
# Remove the temporary directory
rm -rf /tmp/images
```

(38) 19-add-ubuntu.sh

This script download the Ubuntu Cloud Image¹² and imports it into Glance. This is a VM image with a pre-installed version of Ubuntu that is customized by Ubuntu engineering to run on cloud-platforms such as Openstack, Amazon EC2, and LXC.

(39) 20-nova-install.sh

This script install Nova – the OpenStack compute service, as well as the Qpid AMQP message broker. The message broker is required by the OpenStack services to communicate with each other.

```
# Install OpenStack Nova (compute service)
# and the Qpid AMQP message broker
yum install -y openstack-nova* qpid-cpp-server
```

(40) 21-nova-create-db.sh

This script creates a MySQL database for Nova called nova, which is used to store VM instance metadata. The script also creates a nova user and grants full permissions to the nova database to this user. The script also enables the access to the database from hosts other than controller.

 $^{^{12}}$ Http://uec-images.ubuntu.com/.

(41) 22-nova-permissions.sh

This script sets restrictive permissions on the Nova configuration file, since it contains sensitive information, such as user credentials. The script also sets the ownership of the Nova related directories to the nova group.

```
# Set restrictive permissions for the Nova config file
chmod 640 /etc/nova/nova.conf

# Set the ownership for the Nova related directories
chown -R root:nova /etc/nova
chown -R nova:nova /var/lib/nova
(42) 23-nova-config.sh
```

This scripts invokes the Nova configuration script provided in the lib directory, since it is shared by the scripts setting up Nova on all the controller, and the compute hosts.

```
# Run the Nova configuration script
# defined in ../lib/nova-config.sh
../lib/nova-config.sh
```

The content of the nova-config.sh script is given below:

```
# This is a Nova configuration shared
# by the compute hosts, gateway and controller
# Enable verbose output
openstack-config --set /etc/nova/nova.conf DEFAULT \
    verbose True
```

```
# Set the connection to the MySQL server
openstack-config --set /etc/nova/nova.conf DEFAULT \
    sql_connection mysql://nova:$NOVA_MYSQL_PASSWORD@controller/nova
# Make Nova use Keystone as the identity management service
openstack-config --set /etc/nova/nova.conf DEFAULT \
    auth_strategy keystone
# Set the host name of the Qpid AMQP message broker
openstack-config --set /etc/nova/nova.conf DEFAULT \
    qpid_hostname controller
# Set Nova user credentials
openstack-config --set /etc/nova/api-paste.ini filter:authtoken \
    admin tenant name $NOVA SERVICE TENANT
openstack-config --set /etc/nova/api-paste.ini filter:authtoken \
    admin_user $NOVA_SERVICE_USERNAME
openstack-config --set /etc/nova/api-paste.ini filter:authtoken \
    admin_password $NOVA_SERVICE_PASSWORD
openstack-config --set /etc/nova/api-paste.ini filter:authtoken \
    auth_uri $NOVA_OS_AUTH_URL
# Set the network configuration
openstack-config --set /etc/nova/nova.conf DEFAULT \
    network_host compute1
openstack-config --set /etc/nova/nova.conf DEFAULT \
    fixed_range 10.0.0.0/24
openstack-config --set /etc/nova/nova.conf DEFAULT \
    flat_interface eth1
openstack-config --set /etc/nova/nova.conf DEFAULT \
    flat_network_bridge br100
openstack-config --set /etc/nova/nova.conf DEFAULT \
   public_interface eth1
# Set the Glance host name
openstack-config --set /etc/nova/nova.conf DEFAULT \
    glance_host controller
# Set the VNC configuration
openstack-config --set /etc/nova/nova.conf DEFAULT \
    vncserver_listen 0.0.0.0
openstack-config --set /etc/nova/nova.conf DEFAULT \
    vncserver_proxyclient_address controller
# This is the host accessible from outside,
```

```
# where nouncproxy is running on
openstack-config --set /etc/nova/nova.conf DEFAULT \
    novncproxy_base_url http://$PUBLIC_IP_ADDRESS:6080/vnc_auto.html

# This is the host accessible from outside,
# where xvpvncproxy is running on
openstack-config --set /etc/nova/nova.conf DEFAULT \
    xvpvncproxy_base_url http://$PUBLIC_IP_ADDRESS:6081/console

# Set the host name of the metadata service
openstack-config --set /etc/nova/nova.conf DEFAULT \
    metadata_host $METADATA_HOST
```

Apart from user credentials, the script configures a few other important options:

- the identity management service Keystone;
- the Qpid server host name controller;
- the host running the Nova network service compute1 (i.e. gateway);
- the network used for VMs 10.0.0.0/24;
- the network interface used to bridge VMs to eth1;
- the Linux bridge used by VMs br100;
- the public network interface eth1;
- the Glance service host name controller;
- the VNC server host name controller;
- the IP address of the host running VNC proxies (they must be run on the host that can be accessed from outside; in our setup it is gateway) \$PUBLIC_IP_ADDRESS;
- the Nova metadata service host name controller.

(43) 24-nova-init-db.sh

This scripts initializes the nova database using the nova-manage command line tool.

```
# Initialize the database for Nova
nova-manage db sync
```

(44) 25-nova-start.sh

This script starts various Nova services, as well as their dependencies: the Qpid AMQP message broker, and iSCSI target daemon used by the nova-volume service.

```
# Start the Qpid AMQP message broker
service qpidd restart
# iSCSI target daemon for nova-volume
service tgtd restart
# Start OpenStack Nova services
service openstack-nova-api restart
service openstack-nova-cert restart
service openstack-nova-consoleauth restart
service openstack-nova-direct-api restart
service openstack-nova-metadata-api restart
service openstack-nova-scheduler restart
service openstack-nova-volume restart
# Make the service start on the system startup
chkconfig apidd on
chkconfig tgtd on
chkconfig openstack-nova-api on
chkconfig openstack-nova-cert on
chkconfig openstack-nova-consoleauth on
chkconfig openstack-nova-direct-api on
chkconfig openstack-nova-metadata-api on
chkconfig openstack-nova-scheduler on
chkconfig openstack-nova-volume on
```

08-openstack-compute (compute nodes) The scripts described in this section should be run on the compute hosts.

(45) 01-source-configrc.sh

This scripts is mainly used to remind of the necessity to "source" the configrous file prior to continuing, since some scripts in this directory use the environmental variable defined in configro. To source the file, it is necessary to run the following command . Ol-source-configro.sh.

```
echo "To make the environmental variables available \
    in the current session, run: "
echo ". 01-source-configrc.sh"
```

```
# Export the variables defined in ../config/configrc
. ../config/configrc
```

(46) 02-install-nova.sh

This script installs OpenStack Nova and OpenStack utilities.

```
# Install OpenStack Nova and utils
yum install -y openstack-nova* openstack-utils
```

(47) 03-nova-permissions.sh

This script sets restrictive permissions (640) on the Nova configuration file, since it contains sensitive information, such as user credentials. Then, the script sets the ownership on the Nova and Libvirt related directories to the nova user and nova group. The script also sets the user and group used by the Quick EMUlator¹³ (QEMU) service to nova. This is required since a number of directories need to accessed by both Nova using the nova user and nova group, and QEMU.

```
# Set restrictive permissions for the Nova config file
chmod 640 /etc/nova/nova.conf

# Set the ownership for the Nova related directories
chown -R root:nova /etc/nova
chown -R nova:nova /var/lib/nova
chown -R nova:nova /var/cache/libvirt
chown -R nova:nova /var/run/libvirt
chown -R nova:nova /var/lib/libvirt

# Make Qemu run under the nova user and group
sed -i 's/#user = "root"/user = "nova"/g' /etc/libvirt/qemu.conf
sed -i 's/#group = "root"/group = "nova"/g' /etc/libvirt/qemu.conf
(48) 04-nova-config.sh
```

This scripts invokes the Nova configuration script provided in the lib directory, which has been detailed above.

```
# Run the Nova configuration script
# defined in ../lib/nova-config.sh
../lib/nova-config.sh
```

¹³Http://en.wikipedia.org/wiki/QEMU.

(49) 05-nova-compute-start.sh

First, this script restarts the Libvirt service since its configuration has been modified. Then, the script starts Nova compute service and sets it to automatically start during the system start up.

```
# Start the libvirt and Nova services
service libvirtd restart
service openstack-nova-compute restart
chkconfig openstack-nova-compute on
```

09-openstack-gateway (network gateway) This scripts described in this section need to be run only on the gateway.

```
(50) 01-source-configrc.sh
```

This scripts is mainly used to remind of the necessity to "source" the configrc file prior to continuing, since some scripts in this directory use the environmental variable defined in configrc. To source the file, it is necessary to run the following command . 01-source-configrc.sh.

```
echo "To make the environmental variables available \
    in the current session, run: "
echo ". 01-source-configrc.sh"

# Export the variables defined in ../config/configrc
.../config/configrc
```

(51) 02-nova-start.sh

It is assumed that the gateway host is one of the compute hosts; therefore, the OpenStack compute service has already been configured and is running. This scripts starts 3 additional Nova services that are specific to the gateway host: openstack-nova-network, openstack-nova-novncproxy, and openstack-nova-xvpvncproxy. The openstack-nova-network service is responsible for bridging VM instances into the physical network, and configuring the Dnsmasq¹⁴ service for assigning IP addresses to the VMs. The VNC proxy services enable VNC connections to VM instances from the outside network; therefore, they must be run on a machine that has access to the public network, which is the gateway in our case.

¹⁴Http://en.wikipedia.org/wiki/Dnsmasq.

```
# Start the libvirt and Nova services
# (network, compute and VNC proxies)
service libvirtd restart
service openstack-nova-network restart
service openstack-nova-compute restart
service openstack-nova-novncproxy restart
service openstack-nova-xvpvncproxy restart
# Make the service start on the system start up
chkconfig openstack-nova-network on
chkconfig openstack-nova-compute on
chkconfig openstack-nova-novncproxy on
chkconfig openstack-nova-xvpvncproxy on
```

This service creates a Nova network 10.0.0.0/24, which is used to allocate IP addresses from by Dnsmasq to VM instances. The created network is configured to use the br100 Linux bridge to connect VM instances to the physical network.

(53) 04-nova-secgroup-add.sh

(54) 05-dashboard-install.sh

(52) 03-nova-network-create.sh

This script adds two rules to the default OpenStack security group. The first rule enables the Internet Control Message Protocol (ICMP) for VM instances (the ping command). The second rule enables TCP connection via the 22 port, which is used by SSH.

```
# Enable ping for VMs
nova secgroup-add-rule default icmp -1 -1 0.0.0.0/0
# Enable SSH for VMs
nova secgroup-add-rule default tcp 22 22 0.0.0.0/0
```

This script installs the OpenStack dashboard. The OpenStack dashboard provides a web-interface to managing an OpenStack environment. Since the dashboard is supposed to be accessed from outside, this service must be installed on a host that has access to the public network, which is the gateway in our setup.

```
# Install OpenStack Dashboard
yum install -y openstack-dashboard
```

(55) 06-dashboard-config.sh

This script configures the OpenStack dashboard. Particularly, the script sets the OPENSTACK_HOST configuration option denoting the host name of the management host to controller. The script also sets the default Keystone role to the value of the \$OS_TENANT_NAME environmental variable.

```
# Set the OpenStack management host
sed -i 's/OPENSTACK_HOST = "127.0.0.1"/OPENSTACK_HOST = "controller"/g' \
    /etc/openstack-dashboard/local_settings

# Set the Keystone default role
sed -i "s/OPENSTACK_KEYSTONE_DEFAULT_ROLE = \"Member\"/OPENSTACK_KEYSTONE_DEFAULT_ROLE = \"%
    /etc/openstack-dashboard/local_settings
```

(56) 07-dashboard-start.sh

This script starts the httpd service, which is a web server configured to serve the OpenStack dashboard. The script also sets the httpd service to start automatically during the system start up. Once the service is started, the dashboard will be available at http://localhost/dashboard, where 'localhost' should be replaced by the public IP address of the gateway host for accessing the dashboard from the outside network.

```
# Start the httpd service.
service httpd restart
chkconfig httpd on
```

At this point the installation of OpenStack can be considered completed. The next steps are only for testing the environment.

10-openstack-controller (controller) The scripts described in this section need to be run only on the controller. These scripts are not a part of the installation process and are only used for testing the correctness of the performed OpenStack installation.

(57) 01-source-configrc.sh

This scripts is mainly used to remind of the necessity to "source" the configrc file prior to continuing, since some scripts in this directory use the environmental variable defined in configrc. To source the file, it is necessary to run the following command . 01-source-configrc.sh.

```
echo "To make the environmental variables available \
    in the current session, run: "
echo ". 01-source-configrc.sh"

# Export the variables defined in ../config/configrc
.../config/configrc
```

(58) 02-boot-cirros.sh

This script creates a VM instance using the Cirros image added to Glance previously.

```
# Create a VM instance from the Cirros image
nova boot --image cirros-0.3.0-x86_64 --flavor m1.small cirros
```

(59) 03-keypair-add.sh

This script creates a key pair, which is injected by OpenStack into VMs to allow password-less SSH connections. The generated private key is save into the ../config/test.pem file.

```
# Create a key pair
nova keypair-add test > ../config/test.pem
chmod 600 ../config/test.pem
```

(60) 04-boot-ubuntu.sh

This script creates a VM instance using the Ubuntu Cloud image added to Glance previously. The executed command instructs OpenStack to inject the previously generated public key called test to allow password-less SSH connections.

```
# Create a VM instance from the Ubuntu Cloud image
nova boot --image ubuntu --flavor m1.small --key_name test ubuntu
```

(61) 05-ssh-into-vm.sh

This script shows how to SSH into a VM instance, which has been injected with the previously generated test key. The script accepts one argument: the IP address of the VM instance.

```
# SSH into a VM instance using the generated test.pem key.
if [ $# -ne 1 ]
then
    echo "You must specify one arguments - \
        the IP address of the VM instance"
    exit 1
fi
ssh -i ../config/test.pem -l test $1

(62) 06-nova-volume-create.sh
```

This script shows how to create a 2 GB Nova volume called myvolume. Once created, the volume can be dynamically attached to a VM instance, as shown in the next script.

```
# Create a 2GB volume called myvolume
nova volume-create --display_name myvolume 2
```

(63) 07-nova-volume-attach.sh

This script shows how to attached a volume to a VM instance. The script accepts two arguments: (1) the name of the VM instance to attach the volume to; and (2) the ID of the volume to attach to the VM instance. Once attached, the volume will be available inside the VM instance as the '/dev/vdc/ device. The volume is provided as a block storage, which means it has be formatted before it can be used.

Attach the created volume to a VM instance as /dev/vdc.

```
if [ $# -ne 2 ]
then
    echo "You must specify two arguments:"
    echo "(1) the name of the VM instance"
    echo "(2) the ID of the volume to attach"
    exit 1
fi
```

nova volume-attach \$1 \$2 /dev/vdc

5.5 OpenStack Troubleshooting

6 Conclusion

7 References

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- [3] R. Landmann, J. Reed, D. Cantrell, H. D. Goede, and J. Masters, "Red Hat Enterprise Linux 6 Installation Guide," 2012.