



Cisco Intelligent Automation for Cloud 4.2 Installation Guide

Release 4.2
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Ensuring Required Prerequisites Are Ready-to-Go

Successful installation of Cisco IAC 4.2 requires that certain hardware and software prerequisites be in place before you start the install process.

Cisco IAC Components

The major functional components for deployment of Cisco Intelligent Automation for Cloud 4.2 include:

- Cisco Prime Service Catalog (PSC)
- Cisco Process Orchestrator (PO)
- Cisco IAC Virtual Appliance (VA)

Platform Elements

- Amazon EC2
- Chef Server
- Cisco Application Policy Infrastructure Controller (Cisco APIC) *new for 4.2*
- Cisco Prime Network Services Controller (PNSC)
- Cisco Prime Performance Manager (PPM)
- Cisco UCS Director
- Cisco UCS Manager
- Cloud Service Router (CSR) 1000V
- OpenStack
- Puppet Labs' Puppet Master
- VMware vCenter
- VMware vCloud Director

Note: For the complete list of interoperable components and version/release information, see the *Cisco Intelligent Automation for Cloud 4.2 Compatibility & Requirements Matrix* located here:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/intelligent-automation-cloud/tsd-products-support-series-home.html>.

Checking Required Prerequisites

About Cisco APIC

Cisco Application Policy Infrastructure Controller (Cisco APIC) supports the deployment, management, and monitoring of any application anywhere, with a unified operations model for the physical and virtual components of the infrastructure. The APIC programmatically automates network provisioning and control that is based on the application requirements and policies. Cisco IAC 4.2 speaks to APIC directly with HTTP API requests, similar to how Cisco IAC communicates with OpenStack. We do this to create network policy in ACI (Cisco Application Centric Infrastructure, a distributed, scalable, multi-tenant infrastructure) where our networks act as endpoints. For more information, see the [Cisco APIC REST API User Guide](#), especially the section, “Overview of the APIC REST API” here:

http://www.cisco.com/c/en/us/td/docs/switches/datacenter/aci/apic/sw/1-x/api/rest/b_APIC_RESTful_API_User_Guide/b_IFC_RESTful_API_User_Guide_chapter_01.html

Licensing the Full Version of the Cisco CSR 1000V Series Cloud Services Router Software

Because Cisco IAC 4.2 ships with a 60-day evaluation license for Cisco CSR 1000v Cloud Services Router, you will need to acquire the full license before the evaluation license expires. We recommend doing this as soon as possible to avoid complications such as work or processes interruption.

- For instructions on how to upgrade the evaluation license to a full license, see the section, “Installing CSL Licenses for Cisco IOS XE 3.13S and Later” in the [Cisco CSR 1000V Series Cloud Services Router Software Configuration Guide](#) here:

<http://www.cisco.com/c/en/us/td/docs/routers/csr1000/software/configuration/csr1000Vswcfg/licensing.html#gfld-961006>

- For information specific to Cisco Smart Licensing, refer to the section, “Cisco Smart Licensing” in the [Cisco CSR 1000V Series Cloud Services Router Software Configuration Guide](#) here:

<http://www.cisco.com/c/en/us/td/docs/routers/csr1000/software/configuration/csr1000Vswcfg/licensing.html#gfld-1014512>

Checking Required Prerequisites

Required prerequisite components for Windows installations include but are not limited to:

- Microsoft IIS
- Microsoft .NET framework

Note: Be sure to enable Microsoft IIS before installing .NET framework. This will automatically register ASP.NET with Microsoft IIS.

- Oracle and/or Microsoft SQL Server database
- Linux O/S for non-Windows installations
- Java Runtime Environment (JRE)
- JBoss application server
- A web browser: Microsoft Internet Explorer, Mozilla Firefox, Google Chrome, or Apple Safari
- PSEXec (ensure that version 2.11 or greater is present on Cisco Process Orchestrator)

Note: Check that these components are installed, configured, and running in the supported versions (see the [Cisco Intelligent Automation for Cloud 4.2 Compatibility & Requirements Matrix](#) located here: <http://www.cisco.com/c/en/us/support/cloud-systems-management/intelligent-automation-cloud/tsd-products-support-series-home.html> for details) before you begin the Cisco Intelligent Automation for Cloud installation process.

Note: See [Solution Prerequisites Checklists](#), page 81 for more details.

Note: Refer to the installation guides for each component product for complete information on how to install and configure the associated software; for example, see the *Cisco Process Orchestrator* guides for complete information on Cisco Process Orchestrator.

Note: DBAs commonly have a convention or security policy requiring a user-naming scheme. Note that you will most likely not be able to set the username of the service account according to your practices with Cisco IAC 4.2.

Note: PSExec should be installed on the Cisco Process Orchestrator server for Application Configuration Management. Place PSExec onto your executable path for installing applications on a Windows Server.

Setting Up Your Networks

First, choose a network type to determine how this network can be used:

- User networks are used for deploying virtual machines.
- Management networks are used for management access to cloud servers.
- Infrastructure networks are used for management interfaces of Hypervisor hosts and other infrastructure devices.

Then, prepare your networks to include the following requirements:

- At least one VLAN to use as a destination network for provisioning servers. You can define a destination network as a community, user, or management network when you create the network in Prime Service Catalog.
 - User networks are assigned to specific Virtual Data Centers owned by an organization.
 - Management infrastructure within the cloud system may be used to manage cloud servers, for example, for remote access and monitoring.

Preparing Storage Management

Prepare your storage management system using the following information:

- Install and configure Storage Area Network (SAN) storage or iSCSI storage required for Distributed Resource Scheduler (DRS) clusters. For iSCSI or Network File System (NFS) storage solutions, VMware supports Dynamic Host Configuration Protocol (DHCP.) It is important that any of these solutions use DHCP, otherwise static IP information, wherever it is applicable, will have to be configured manually after the automated process is complete.
- Create the storage volumes that will be used for datastores and datastore clusters.
- Configure Logical Unit Number (LUN) access in your storage management system and assign World Wide Node Name (WWN) pools (see [“Setting Up Cisco UCS Manager Pools” on page 4](#))

vCenter datastores map to or reference specific LUNs. These mappings will replicate to a new host if the host blade has been given the same LUN access as all the other hosts in the cluster. This is accomplished through WWN pools.

LUN configuration can be assigned to any WWN that is within a specific range. For a new host to be assigned WWNs that are within that range, ensure that it is coming from the pre-defined pool. Whenever a service profile is created from a service profile template for a blade, specify that the template generate WWN assignments from a specific pre-defined pool in Cisco UCS Manager. Datastore access should automatically be in sync with all the other hosts in that cluster when the service profile template is used to provision the blade.

Preparing Cisco UCS and Bare Metal Operating System Provisioning

Setting Up Cisco UCS Manager

While Cisco UCS Manager is an optional component, should your cloud deployment include this technology, Cisco UCS Manager should be installed and configured before installing Cisco IAC 4.2. For instructions on installing and configuring the application, see the [Cisco UCS Manager documentation on cisco.com](#).

Setting Up Cisco UCS Manager Pools

Cisco UCS Manager utilizes different types of pools to control assignment of unique identifiers (such as UUIDs, MACs and WWNs) to blade servers. These pools must be created and assigned to Service Profiles. You need to create the following pools:

- Universal Unique Identifier (UUID) Suffix Pool—Used to uniquely identify each blade server.
- Media Access Control (MAC) Address Pool—Used to assign a unique MAC address to each vNIC assigned to a blade.
- WWNN (World Wide Node Name) Pool—Assigned to a node in a Fibre Channel fabric, and used to assign unique WWNNs to each blade in a range that will allow appropriate LUN access
- WWPN (World Wide Port Names) Pool—Assigned to specific ports in a Fibre Channel fabric, and used to assign unique WWPNs to each blade in a range that will allow appropriate LUN access

For instructions on creating the pools, see the [Cisco UCS Manager documentation on cisco.com](#).

Preparing VMware Software

vCenter O/S support is shown below.

Table 1 OS Customization Support

OS Release	vCenter Version		
	5	5.1	5.5
Windows Server 2008 R2	Yes	Yes	Yes
Windows Server 2012	Yes ²	Yes ¹	Yes
Red Hat Enterprise Linux 6.x	Yes	Yes	Yes
Red Hat Enterprise Linux 7.x	Yes	Yes	Yes
CentOS 5x	No	Yes ³	Yes ²
CentOS 6x	No	Yes ³	Yes ²
Ubuntu 12.04 LTS	Yes ²	Yes ¹	Yes

Key:

No = Not supported

Yes = Supported

Yes¹ = Supported from Update 1

Yes² = Supported from Update 2

Yes³ = Supported from Update 3

Important Note Regarding Cisco Prime Service Catalog Installation

Supported Installation Media for ESXi

Provisioning of the ESXi Hypervisor OS always uses the first local drive installed in the blade. Cisco IAC supports installation of ESXi to local disks only (not over a SAN).

VMware Installation Requirements

The following VMware software should be installed:

- vSphere PowerCLI on the Process Orchestrator server to support the activities for adding a new ESXi host to a cluster.

Note: For supported software versions, see the *Cisco Intelligent Automation for Cloud 4.2 Compatibility & Requirements Matrix* located here:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/intelligent-automation-cloud/tsd-products-support-series-home.html>.

Prepare your VMware environment for virtual provisioning using the following checklist:

- Install VMware vCenter.
- Configure VMware vCenter:
 - Apply enterprise licensing and enable VMware vSphere Distributed Resource Scheduler (DRS), and enable Storage DRS.
 - Determine and create the datacenter, clusters, hosts, datastores, networks, and resource pools to which all commissioned hosts and VMs will be deployed.
- Define at least one VM template with VMware tools using a boot disk.
 - Be sure the template is configured for the exactly the same size and shape VM you want, not including any networks that are not available when the template is cloned.
 - If several different configurations are desired, they should be controlled by supplying a unique template for each configuration.

Provisioned hosts will have evaluation licensing only. You will need to add licensing manually in the vSphere Client.

Note: For information about installing and configuring your VMware environment, see the *ESX and vCenter Server Installation Guide 4.0*.

Note: Users must have the ability to create resource pools. In addition, resource pools must be enabled on VMware vCenter.

Note: Forward slashes in vCenter object names break the parsing process. If any of your vCenter object names contain forward slashes, rename the files before you specify a vCenter path.

Important Note Regarding Cisco Prime Service Catalog Installation

During the Prime Service Catalog installation process, you are presented with a checkbox to install storefront content. Do **not** check this box (leave it unchecked).



Installing and Configuring Optional Software

This chapter covers optional software that can be used with Cisco IAC 4.2. Note that this chapter provides only product names. For version numbers, see the [Cisco Intelligent Automation for Cloud Product Compatibility Matrix](#). Optional software includes but is not limited to:

- Cisco Software, including:
 - Cisco Application Policy Infrastructure Controller (Cisco APIC) *new for 4.2*
 - Cisco APIC Plugin/Driver for OpenStack *new for 4.2*
 - Cisco IAC integration with ACI *new for 4.2*
 - Cisco IAC Management Appliance
 - Cisco Prime Network Services Controller
 - Cisco UCS Director
 - Cisco UCS Manager
- VMware, including:
 - vCenter
 - vCloud Director
 - ESXi
 - vSphere
 - vSphere PowerCLI
- Microsoft Active Directory and other LDAP servers
- OpenStack
- Amazon EC2
- Puppet Labs' Puppet Master
- Chef Server

Understanding Cisco Prime Network Services Controller

Cisco Prime Network Services Controller (formerly known as Cisco Virtual Network Management Center, or VNMC) provides centralized multi-device and policy management for Cisco network virtual services. For instructions on installing and configuring Cisco Prime Network Services Controller, see [Cisco Prime Network Services Controller documentation](#) on Cisco.com.

Understanding Cisco UCS Director

Cisco UCS Director (formerly Cisco Cloupia) delivers unified management for industry-leading converged infrastructure solutions based on Cisco Unified Computing System (UCS) and Cisco Nexus technologies. UCS Director is a higher-level manager over multiple UCS Managers. For instructions on installing and configuring Cisco UCS Director, see [Cisco UCS Director documentation](#) on Cisco.com.

Understanding Cisco UCS Manager

Cisco Unified Computing System (UCS) Manager provides unified, embedded management of all software and hardware components in the Cisco UCS. It controls multiple chassis and manages resources for thousands of virtual machines. For instructions on installing and configuring Cisco UCS Manager, see [Cisco UCS Manager documentation](#) on Cisco.com.

Preparing the Directory and Mail Server via LDAP and SMTP

To prepare your directory and e-mail environment, ensure that the following conditions are met:

- LDAP server software, such as Microsoft Active Directory, is installed and configured.
- SMTP server is installed and configured with an account to send and receive e-mails.

Note: For information on configuring the SMTP server, see the [Cisco Process Orchestrator Installation and Administration Guide](#) or the [Cisco Cisco Prime Service Catalog Installation Guide](#).

Understanding Amazon EC2

Amazon EC2 is a Web-based service that allows business subscribers to run application programs in the Amazon.com computing environment. The EC2 can serve as a practically unlimited set of virtual machines. For more about Amazon EC2, see the Amazon EC2 website at <http://aws.amazon.com/ec2/>.

Configuring OpenStack

Cisco Intelligent Automation for Cloud 4.2 supports two types of OpenStack deployment:

- Standard openstack.org deployment, which allows for private networks (that is, networks under a project). These are created with GRE overlay network transports, from compute to the network node.
- Cisco APIC-enabled OpenStack with private networks of type “VLAN.” With this scenario, Cisco IAC Network POD and associated orchestration services and workflows identify and maintain consistent VLAN assignment and IP addressing.

Note: For more information on Cisco APIC and OpenStack, refer to detailed Cisco APIC documentation located here: http://www.cisco.com/c/en/us/td/docs/switches/datacenter/aci/apic/sw/1-x/api/openstack/b_Cisco_APIC_OpenStack_Driver_Install_Guide.html.

OpenStack Versions Supported

Cisco IAC 4.2 supports the following versions of OpenStack. Note that only the versions listed below have been implemented and successfully tested here at Cisco. The interoperability of any other version(s) of OpenStack cannot be guaranteed. In addition, the Cisco APIC OpenStack Driver is supported for use with Cisco IAC 4.2 and OpenStack.

For implementation information, see the [Installing the Cisco APIC OpenStack Driver Guide](#) here:

http://www.cisco.com/c/en/us/td/docs/switches/datacenter/aci/apic/sw/1-x/api/openstack/b_Cisco_APIC_OpenStack_Driver_Install_Guide.html

- Juno
- IceHouse

Note: If you are using IceHouse, ensure that the Neutron service component has been installed and configured vs. legacy networking (Nova-network).

Required OpenStack Services

The following OpenStack services are mandatory for the correct performance of Cisco IAC 4.2:

- Block Storage (Cinder)
- Compute (Nova)
- Identity (Keystone)
- Image (Glance)
- Networking (Neutron)
- Prime Performance Manager (Ceilometer)

Note: We also recommended installing the OpenStack dashboards included as part of Horizon.

OpenStack Configuration Notes

1. If you are using all-in-one deployment or a scenario with only one available compute node make sure that you have set both `allow_resize_to_same_host` and `allow_migrate_to_same_host` to `true` in configuration file at `/etc/nova/nova.conf`.

Note: These options allow you to resize the instance on one node.

Set `resize_confirm_window=x`. By default, this is set to 0, but you need to change this to x seconds in order to automatically confirm the resize after x seconds.

2. If you are running OpenStack within a virtual machine set, in order to use QEMU you must set the following options in configuration file on your compute host(s) at `/etc/nova/nova.conf`:

```
libvirt_type=qemu
Cinder service=mandatory
```

Note: Configuration changes are applied only after the restart of Nova services.

3. If you would like OpenStack to report debugging information into an `httpd log` file, specify the following parameters in the configuration files found at `/etc/openstack-dashboard/local_settings`:

```
DEBUG=True
TEMPLATE_DEBUG=DEBUG
```

Note: The file may be a significant size; this may negatively affect performance.

4. Check that you have opened all necessary ports in your firewall:

```
8776 - Block Storage (cinder)
8774 - Compute (nova) endpoints
5000 - Identity service public endpoint
9696- Networking (neutron)
5672 - Message Broker (AMQP traffic)
```

Note: You can find a list of the recommended ports here:

<http://docs.openstack.org/trunk/config-reference/content/firewalls-default-ports.html>

Note: For the correct steps needed to install the OpenStack solution on your environment, refer to the OpenStack documentation located on the OpenStack website at: <http://docs.openstack.org/>.

Configuring Puppet Labs for Cisco IAC Integration

Puppet Labs software must be licensed and in place for use with Cisco Intelligent Automation for Cloud 4.2. Puppet Enterprise 3.0.1 or higher is recommended. The FOSS (Open Source) version is not supported. For POCs, PE is available for free to manage up to 10 nodes.

For Puppet, the following services are included:

- Register Puppet Role
- Update Puppet Infrastructure Item
- Activate Puppet Resource

Note: An active Internet connection to the Puppet clients is required to properly install new applications.

Basic Puppet Considerations

To leverage integration with Puppet with Cisco IAC, Puppet modules need to be designed to expose roles and profiles. Node classification is accomplished via Hiera, so the site.pp file for each environment must include the following:

```
node default {
  hiera_include('classes')
}
```

Your main hiera.yaml file should look something like the following:

```
---
:backends:
- yaml!

:yaml:
:datadir: /etc/puppetlabs/puppet/environments/{environment}/hieradata

:hierarchy:
- "nodes/{fqdn}"
- common
```

Be advised that when you create a Puppet connection from System Setup, it creates two Process Orchestrator targets, a main Web Service target (for future use) and a reference to a Terminal target (for SSH). You should update the terminal target's default maximum number of concurrent sessions to a number greater than one (preferably 100) to avoid bottlenecks when running Puppet on multiple nodes.

Self-service ordering of servers includes the option to apply a single Puppet role from an environment. Although best practice is to assign a single role to a server, this can be extended further to include multiple roles, or add roles later through an add-on service. This is out of scope for Cisco IAC 4.2, but is available through stack blueprints using the Application Stack Accelerator Pack (ASAP).

Note: With Cisco IAC 4.2, you can add multiple puppet applications to a single node (VM).

Puppet is configured via an SSH/PSExec connection to the new node. A well-known root/Administrator (or equivalent) user and password is required for cases where no password is specified in the order. All nodes requiring configuration management should have the same root/Administrator user/password. This can be changed during or post-configuration. Sudo is used for non-root users. The certificate authority for Puppet requires that clocks for master and agent servers be synchronized with a common time source (for example, using the ntpd service).

Note: For vCenter, Cisco IAC automatically configures new Puppet nodes to have VMware Tools synchronize the clock with the ESXi host; therefore, the best way to achieve clock synchronization is to ensure that the ESXi hosts and the Puppet Master use the same time authority to set the time.

If the Puppet master requires a private key file to connect, you will need to specify this with the Connect Cloud Infrastructure or Update Cloud Infrastructure service. Check the Additional Options check box to specify this.

If you need to use an alternative repository for the Puppet Enterprise Installer, you can override the default Puppet Labs location with the Connect Cloud Infrastructure or Update Cloud Infrastructure service. Choose the Additional Options check box to specify a different base URL. The installer files must match the Puppet Labs naming conventions exactly.

You can override the location for the hiera node classification files with the Connect Cloud Infrastructure or Update Cloud Infrastructure service. Choose the Additional Options check box to specify an override. You use `environment` as a placeholder in the path. Be sure your hiera.yaml file is modified accordingly.

Method for Sharing Facts Between Nodes and Stacks

When using Puppet with the Application Stack Accelerator Pack (ASAP), it is often necessary for one node in a stack to be able to reference the facts of another (for example, the IP Address). This is achieved by recording the stack instance name and the role in a stack as external facts for each node that can be used as lookup criteria. To query facts about the other nodes in a stack you need to first have installed the prerequisite *puppetdbquery* module from <https://forge.puppetlabs.com/dalen/puppetdbquery>.

Facts that Cisco IAC automatically assigns to nodes include:

- `stack_instance`: Name of the Stack Instance (shared by all servers in the same stack)
- `stack_role`: Role Name or List of Role Names (comma-separated) for the server
- `iac_organization`: Name of the IAC organization (including tenant prefix) for customer who ordered the stack

In your puppet code, use the following as an example of retrieving facts about another node in the stack.

```
$db_host_ip = query_nodes("stack_instance='$stack_instance' and stack_role~'(,|^)mysql (,|$)')
```

The query above returns the IP address for the node that has the role `mysql` in the same stack as the current node running this code.

Working With Class Parameter Overrides

The IAC integration with Puppet allows class parameter value overrides to be configured and exposed to users ordering servers. This is done through special JSON files that reside in the same location as your profile module's puppet code (under manifests). Class override parameters are always defined in the profile module, and, if present, have the same name as profile or profile subclass followed by ".params.json".

Below is a sample of "webserver.params.json" corresponding to the profile class called "webserver". For each parameter, you provide a friendly name, description, default value, and most importantly, what class parameter you are overriding. You can alternatively define an externally defined fact for a node by specifying 'fact', 'factor' or an empty value for the class_param attribute of the parameter.

If you provide a comma-separated options list, users will have to choose one of the values in the list. Override values are added to the hiera node classification file along with the role that includes the profiles requiring these parameter values. Because class parameter overrides are handled in Hiera node classification, be careful of parameter override precedence. Any values provided in a "class" inclusion block, will take precedence over those values provided by Hiera.

Profile Class Parameter Overrides JSON Example

```
{
```

```

    "id": "profile::webserver",
    "parameters": {
      "customer.name": {
        "display_name": "Customer Name",
        "description": "The customer name",
        "help_text": "Please select a valid customer.",
        "options": "PuppetLabs,Cisco Systems,ACME Bread",
        "data_type": "string",
        "validation": "",
        "value": "PuppetLabs",
        "required": "yes",
        "class_param": "myapp::custname"
      },
      "customer.greeting": {
        "display_name": "Customer Greeting",
        "description": "Greeting to display to customer.",
        "help_text": "Please select a customer greeting. For example, Hello.",
        "options": "",
        "data_type": "string",
        "validation": "",
        "value": "Hello",
        "required": "yes",
        "class_param": "facter"
      },
      "http.port": {
        "display_name": "HTTP Port",
        "description": "The HTTP port to use.",
        "help_text": "Please select an HTTP port for the web page. Default is 80.",
        "options": "",
        "data_type": "integer",
        "validation": "",
        "value": "99",
        "required": "no",
        "class_param": "apache::port"
      }
    }
  }
}

```

Proxies for Puppet

To set up your proxies for Puppet, follow the steps below.

1. Navigate to Setup > System Settings > Connections.
2. Select **Connect Cloud Infrastructure** if you are setting up the initial connection, or select **Update Cloud Infrastructure** if you want to go back into your setup and add or change the proxy settings.

Important: When you update settings using the Update Cloud Infrastructure, you must re-enter information (such as passwords) into any field that displays as empty. The reason for this is that the system will overwrite the existing data for that field in the database with blanks. Passwords are not displayed for security / cryptographic reasons.

3. Scroll down and select **Show Additional Options**.
4. Enter the **Installer Package Base** URL as needed.
5. Enter the **Alternate Module Path** information, as needed.
6. Enter the **Hiera Node Classification Path**, as needed.
7. From the **Bootstrap/Proxy info for Operating System**, select either Windows or Linux.

Note: You can enter information for both, and Cisco IAC will track it. You can only enter one at a time.

8. Enter the proxy (either **Windows Proxy** or **Linux Proxy**, as is appropriate.) For example, `http://133.133.133.152`. Include the port number, if that is how you have set up your environment; for example: `http://133.133.133.152:8080`.

9. In the Proxy Bypass box, enter one or many exceptions. You can enter them as URLs or as IP addresses. They must be separated by semi-colons (;) or the system will not parse them correctly.

Note: While there is a field for the proxy bypass for Windows, this feature does not actually function. At this time, Windows does not accept a proxy bypass.

10. Enter the **Bootstrap User** name and the **Bootstrap Password**.

11. Enter the **Private Key**, as needed.

12. Click **Submit**.

Note: Alternatively, if proxies are used in your environment, you can update the following extended target properties as necessary for your Puppet web target in Process Orchestrator:

```
Puppet.Target.Bootstrap.Linux.Proxy Puppet.Target.Bootstrap.Linux.NoProxy
Puppet.Target.Bootstrap.Windows.Proxy Puppet.Target.Bootstrap.Windows.NoProxy
```

Configuring Chef for Cisco IAC Integration

Chef Labs software must be licensed and in place for use with Cisco Intelligent Automation for Cloud 4.2. Hosted or Private Chef 11.4 or higher is required (with appropriate patches). For Chef, the following services are included:

- Register Chef Cookbook
- Register Chef Role
- Update Chef Infrastructure Item
- Activate Chef Resource

Due to Chef recently changing its naming convention for the chef agent installers, we have implemented our own naming conventions for Cisco IAC 4.2 for the local repository. This is the template for those files:

```
chef-{version}-{distro}-{arch}.rpm
chef-{version}-{distro}-{arch}.deb
chef-windows-{version}.msi
For example:
chef-11.12.4-el-5-x86_64.rpm
chef-11.12.4-el-6-x86_64.rpm
chef-11.12.4-ubuntu-x86_64.deb
chef-windows-11.12.4.msi
```

Note: An active Internet connection to the Chef clients is required to properly install new roles.

Note: When registering the Chef master in Cisco IAC 4.2, there is the option to configure a proxy server to enable Internet access be used during role installation. If using the proxy settings, make sure to include both the Chef Master and local repository (if applicable) in the proxy bypass. Additional information on proxies is included below.

Basic Chef Considerations

Be advised that when you create a Chef connection from System Setup, it creates two Process Orchestrator targets, a main Web Service target (for future use) with a reference to a Terminal target (for SSH). You should update the terminal target's default maximum number of concurrent sessions to a number greater than one (preferably 100) to avoid bottlenecks when running Chef on multiple nodes.

Self-service ordering of servers includes the option to apply a single Chef role and environment. Although best practice is to assign a single role to a server, this can be extended further to include multiple roles, or add roles/recipes later through an add-on service. This is currently out of scope for this accelerator kit.

For Linux, Chef is configured via an SSH connection to the new node. A well-known root (or equivalent) user and password is required. All Linux templates requiring configuration management should have the same root user and password. This can be changed during or post-configuration. Sudo support will be added in a later release.

You need to set the two extended target properties of the Chef web target in Cisco Process Orchestrator:

```
Chef.Target.Bootstrap.Linux.User
```

```
Chef.Target.Bootstrap.Linux.Password
```

Cisco IAC allows users to specify the Administrator user/password, so the above is not required for Windows. The certificate authority for Chef requires that the server and client clocks be synchronized with a common time source (for example, using the ntpd service).

Note: The hosts/controller these VM/instances run on should also be synced to the same time source; such as VMware Hosts, Openstack Controller/Compute Node.

Note: For vCenter, Cisco IAC automatically configures new Chef nodes to have VMware Tools synchronize the clock with the ESXi host; therefore, the best way to achieve clock synchronization is to ensure that the ESXi hosts and the Chef server use the same time authority to set the time.

If the Chef server/workstation you defined with the Connect Cloud Infrastructure service requires a private key file to connect, you will need to create a new Public-Key Authenticated Admin User runtime user definition in Process Orchestrator and replace the Opscode Chef Terminal (SSH) target's default runtime user.

Note: Connecting via private key is optional, yet recommended.

The integration requires that the cisco-cloud-automation cookbook is uploaded into the Chef repository. The cookbook can be found as a zip file in the kit's Chef folder and should be extracted to a Chef workstation and uploaded to the server. The cookbook is required by the CiscoCM role that also must be uploaded from the included CiscoCM.json file.

OpenStack Node Bootstrapping

During node bootstrapping, the following node attributes are automatically assigned:

```
stack_instance: Name of the Stack Instance (shared by all servers in the same stack)
```

```
iac_organization: Name of the IAC organization (including tenant prefix) for customer who ordered the stack
```

Bootstrapping of ACM roles onto OpenStack Instances

The Linux Bootstrapping credentials input for the Chef or Puppet Platform Element need to have an OS-specific username depending on the template being used. For example, if the version of Linux being used is Ubuntu, the username should be "ubuntu"; if using CentOS, the username will be "centos". If the business is using multiple OS types, the platform element will need to be updated prior to deploying a different os type. The key-pair to these accounts will be set by IAC during the instance creation and therefore be used by the ACM bootstrapping process later on.

Note: Keypair is presently the only option available if the user wants to bootstrap ACM roles onto an OpenStack Linux instance.

Important: To use password SSH authentication instead of key-pairs, configure images to have a generic user and password built in. After creating the instance, log into the console using the generic account and manually change the SSH daemon to allow for password authentication option. With this done, ACM bootstrapping is not possible using password authentication. However, after making the above changes, brownfielding ACM roles is possible using the username and password account.

OpenStack Physical Network Name, GV OpenStack.Configuration.PhysicalNetworkName

For OpenStack with the Cisco APIC plugin, Cisco IAC 4.2 supports deployment with a Physical Network name configured under the ML2 plugin with value of "physnet1" — a common usage for a Network name but one that is a free-form name. You may choose to use another. Cisco IAC provides a Global Variable (OpenStack.Configuration.PhysicalNetworkName) to change this.

Note: For more information on Cisco APIC and OpenStack, refer to detailed APIC documentation located here: http://www.cisco.com/c/en/us/td/docs/switches/datacenter/aci/apic/sw/1-x/api/openstack/b_Cisco_APIC_OpenStack_Driver_Install_Guide.html.

Working with Role Attributes Overrides

The IAC integration with Chef allows node attribute overrides to be configured and exposed to users ordering servers. Attributes are exposed to IAC via Data Bags. You need to create a Data Bag for each Role that needs attribute overrides with the same name as the corresponding role. In that Data Bag, you must have a Data Bag item, called “default”.

Note: Use the following JSON sample below as an example.

For each attribute you want to expose, you can provide a friendly name, default, description, help text, and most importantly a Ruby expression that represents the attribute you will override at runtime. If you provide a comma-separated options list, users will have to choose one of the values in the list.

When a node is ordered, a new Data Bag item is created with the name of the node and includes all of the attribute values used for the configured node. These override values are injected by the cisco-cloud-automation cookbook before the recipes in the role are run.

Role Data Bag Sample JSON

```
{
  "id": "default",
  "attributes": {
    "customer.name": {
      "display_name": "Customer Name",
      "description": "The customer name",
      "help_text": "Please select a valid customer.",
      "options": "Opscode,Cisco Systems,ACME Bread",
      "data_type": "string",
      "validation": "",
      "value": "Opscode",
      "required": "yes",
      "expression": "node.normal[:customer][:name]"
    },
    "customer.greeting": {
      "display_name": "Customer Greeting",
      "description": "Greeting to display to customer.",
      "help_text": "Please select a customer greeting. For example, Hello.",
      "options": "",
      "data_type": "string",
      "validation": "",
      "value": "Hello",
      "required": "yes",
      "expression": "node.normal[:customer][:greeting]"
    },
    "http.port": {
      "display_name": "HTTP Port",
      "description": "The HTTP port to use.",
      "help_text": "Please select an HTTP port for the web page. Default is 80.",
      "options": "",
      "data_type": "integer",
      "validation": "",
      "value": "99",
      "required": "no",
      "expression": "node.force_default[:http][:port]"
    }
  }
}
```

Proxies for Chef

Proxies for Chef are configurable in Connect and update Cloud infrastructure forms. If proxies are used in your environment, you will need to ensure you have the following patches for your Chef server (v11.4-6 provided in Chef folder).

For Linux

```
bootstrap_context.rb (replaces file in <ruby-path-to-chef-gems>/lib/chef/knife/core)
bootstrap.rb (replaces file in <ruby-path-to-chef-gems>/lib/chef/knife)
chef-full.erb (replaces file in <ruby-path-to-chef-gems>/lib/chef/knife/bootstrap)
```

For Windows

```
bootstrap_windows_base.rb
```

(replaces file in <ruby-path>/gems/knife-windows-0.5.13/lib/chef/knife/)

```
windows_bootstrap_context.rb
```

(replaces file <ruby-path>/gems/knife-windows-0.5.13/lib/chef/knife/core)

```
windows-chef-client-msi.erb
```

(replaces file in <ruby-path>/gems/knife-windows-0.5.13/lib/chef/knife/bootstrap)

In your `knife.rb` file, include your proxy information as in the example below

```
bootstrap_proxy = 'http://64.102.255.40:8080'  
bootstrap_no_proxy = '192.168.1.*, internal.chef.server'
```

Setting Up Proxies for Chef in Cisco IAC

To set up your proxies for Chef, follow the steps below.

1. Navigate to Setup > System Settings > Connections.
2. Select **Connect Cloud Infrastructure** if you are setting up the initial connection, or select **Update Cloud Infrastructure** if you want to go back into your setup and add or change the proxy settings.

Note: When you update settings using the Update Cloud Infrastructure, you must re-enter information (such as passwords) into any field that displays as empty. The reason for this is that the system will overwrite the existing data for that field in the database with blanks. Passwords are not displayed for security / cryptographic reasons.

3. Scroll down and select **Show Additional Options**.
4. Enter the **Installer Package Base** URL as needed.
5. From the **Bootstrap/Proxy info for Operating System**, select either Windows or Linux.

Note: You can enter information for both, and Cisco IAC will track it. You can only enter one at a time.

6. Enter the proxy (either **Windows Proxy** or **Linux Proxy**, as is appropriate.) For example, `http://133.133.133.152`. Include the port number, if that is how you have set up your environment; for example:
`http://133.133.133.152:8080`.
7. In the Proxy Bypass box, enter one or many exceptions. You can enter them as URLs or as IP addresses. They must be separated by semi-colons (;) or the system will not parse them correctly.

Note: While there is a field for the proxy bypass for Windows, this feature does not actually function. At this time, Microsoft Windows does not accept a proxy bypass.

8. Enter the **Bootstrap User** name and the **Bootstrap Password**.
9. Click **Submit**.



Installing Cisco IAC PO Automation Packs

In this chapter, you will find instructions for installing the following automation packs:

- Intelligent Automation for Compute.tap
- Intelligent Automation for Cloud Starter.tap
- Intelligent Automation for Cloud.tap
- Intelligent Automation for Cloud Extension Samples.tap (optional but recommended)

Note: You first need to install Cisco Process Orchestrator 3.1.1. For full instructions, refer to the Cisco Process Orchestrator documentation, located here:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/process-orchestrator/tsd-products-support-series-home.html>

Launching the Setup Wizard

1. Download the Cisco IAC 4.2 installer. The IAC 4.2 Cisco Process Orchestrator content files are part of the build file named `IAC_4.2.xxxx`.

Note: To find the latest file, navigate to <http://software.cisco.com>. Find the downloads link and look for Cisco Intelligent Automation for Cloud as the software.

2. Un-zip `IAC4.2.xxx`.
3. Locate the Cisco IAC 4.2 setup.exe file and run it to start the Setup Wizard.

Note: The zip file unpacks into two high-level folders: Prime Service Catalog and Process Orchestrator. The setup.exe file is in the Process Orchestrator folder.

4. Click **Next** to proceed to the next step.
5. On the Information page, click **Next** again to continue.
6. On the Confirm Installation page, click **Next** to continue.
7. On the Installation Complete page, check the **Launch automation pack import wizard** now check box.
8. Click **Close** to launch the Automation Pack Import Wizard. The Import Wizard will first configure itself.

Installing the Core and Common Automation Packs

The Choose Automation Packs dialog box displays. This dialog box shows you a list all available automation packs and other services required for Cisco IAC 4.2. These include the TAPs you just installed, as well as Core and Common Activities. These are presented in a checklist format, and are pre-checked for your convenience.

Note: You must install both the Core and the Common Activities packs. The Cisco IAC packs are dependent on functionality within these packs in order to function properly. In fact, without the Core and Common Activities TAPs, the Cisco IAC TAPs will not import.

1. Click **OK** to continue with chosen options.
2. On the Welcome to the Automation Pack Import Wizard panel, click **Next**.
3. You do not need to enter information on the General Information panel because we are importing the Core and Common Activities. Before you click **Next**, make sure the Core and Common Activities Packs are selected.
4. Click **Next**.
5. Enter **Keystore Password** (required for keystore file containing email digital signatures).
6. On the Email Configuration panel, provide the default SMTP server and sender's e-mail address to be used for e-mail activities, click **Next**.
7. The Automation Summary Configuration panel indicates where the automation summary reports that are generated by activities are to be saved and how long the reports are to be retained. The specified file paths will be used to access and view the automation summary reports.

On the Automation Summary Configuration panel, specify the following information.

- a. Accept the default directory, or enter a different file path for the automation summary directory in the Share Path field. You can also browse to navigate to the file path for the automation summary.
- b. Enter credentials as needed. (These are not required.)
- c. In the Virtual directory mapping area you create the share folder that corresponds to a virtual directory in IIS. Note that you may only create the virtual directory in the local IIS.
 - Check the **Enable virtual directory mapping** check box.
 - Click **Create**.

The Create Virtual Directory dialog box displays, pre-populated with default settings.

- Click **OK** to accept.

Note: Back in the Virtual directory path field, you can edit the string (`http://host:(port)/sharefolder`) if needed.

8. Scroll down and you will see the Automation summary reports grooming settings area. The default deletion period is thirty days, but you can set this to whatever you want, from 1 to 9999. Or, choose the **Delete automation summary reports older than** check box to remove the check and all reports will be saved indefinitely.
9. When you are done working with the Automation Summary Configuration panel, click **Next**.
10. On the Data Extraction panel, **un-check** all of the data options below and then click **Next**.
 - Business Objects Reports
 - Microsoft SCOM Management Packs
 - SQL Server Reporting Services Reports

Note: Take a note of the folder name where the extracted data will be placed and uncheck the SQL Server Reporting Services Reports if you are not using the MS SQL Reporting solution.

- The Review Prerequisites panel displays the prerequisites for the automation pack being imported, and will indicate either pass or fail for each prerequisite.
- After the prerequisite check has completed (and passed), the Importing Objects panel displays.
- After the objects have been imported, the General Information panel displays.

Installing the Cisco IAC Automation Packs

The four Cisco Automation packs are installed next. These include, in sequence:

- **Intelligent Automation for Compute.tap**
- **Intelligent Automation for Cloud Starter.tap**
- **Intelligent Automation for Cloud.tap**
- **Intelligent Automation for Cloud Extension Samples.tap** (optional but recommended)

The install process for each Automation Pack is explained next.

Installing the Intelligent Automation for Compute Pack

1. On the General Information panel, review the information there. Note that the **Name** field now displays “Intelligent Automation for Compute.” This is the first Cisco IAC automation pack that you will be installing.
2. Click **Next**.
3. On the Default Incidents Assignee Setup panel, specify the default user which to assign cloud-related incidents. This is a CPTA (Cloud Provider Technical Administrator) account, or would be within an Active Directory group that was created for all of CPTAs in this Cloud.

4. Click **Next**.

5. On the Cisco Process Orchestrator Web Service panel, specify the following data. Check the **Enable non-secure Web Service (HTTP)** check box in the Web Service Settings area. This setting unencrypts the HTTP endpoints.

Note: If or when presented with a security warning message, click **OK**.

6. Enter or verify the HTTP Port for the Process Orchestrator web target.

7. Choose the appropriate authentication method for the web service:

- **Basic**—Standard method that provides a username and plain-text password to the authentication mechanism.
- **Digest**—Method that provides a username and a hashed password to the authentication mechanism.
- **NTLM—Default**. Authentication protocol that is used on networks that include systems running the Windows operating system and on stand-alone systems.

Note: The NTLM setting supports both NTLM and NTLMv2. In IIS, NTLM is not enabled by default; you must enable NTLM in IIS if you choose this authentication mechanism. The agents in Prime Service Catalog must also be set to use the same authentication that you specify here.

8. When you are done, click **Next** to continue.

9. Enter your credentials:

- a. On the Default Web Service Credentials panel, specify the credentials for connecting to the Process Orchestrator web service target.

- b. When done, click **Next** to continue.

10. Enter a password for VMware keystore access.

The VMware keystore password protects the Java keystore file used to keep SSL certificates for all configured VMware targets.

- For new installations, this password can be set to any valid six-character keytool password.

Note: If the VMware vSphere PowerCLI has not already been installed in the Process Orchestrator server, the wizard displays an information panel informing you of the situation. You can select **Choose this check box to continue with the import** to proceed. However, if you are using VMware vCenter and you have not yet installed VMware vSphere PowerCLI, the contents of the automation pack may not work correctly, if at all, until PowerCLI has been installed.

11. Click **Next**.
12. You will see a process screen display whereby the prerequisites are verified, and then objects are imported.
13. You will then be returned to the General Information panel to install the next Automation Pack.

Installing the Intelligent Automation for Cloud Starter Pack

1. On the General Information panel, review the information about the automation pack. Note that the **Name** field now displays “Intelligent Automation for Cloud Starter.”
2. Click **Next**.
3. On Configure Process Database Grooming panel, specify the number of days to keep process instances in the database. After the specified number of days, the process instances will be deleted from the database. The default value should be satisfactory.
4. Click **Next** to continue.
5. The Data Extraction panel is used to specify the destination where the data is extracted on the Process Orchestrator server. You can simply accept the default location, or browse to specify a different location to extract the files.
6. The Review Prerequisites panel displays briefly and you will see the prerequisites being processed.
7. Next, the Importing Objects panel displays its various progress bars as the data is imported and extracted. This may take some time to complete.
8. When the import is complete, you are automatically returned to the General Information panel.
9. Click **Next**.

Installing the Intelligent Automation for Cloud Extension Samples (Optional)

1. On the General Information panel, review the information about the automation pack. Note that the **Name** field now displays “Intelligent Automation for Cloud Extension Samples.”
2. Click **Next**.
 - a. The Review Prerequisites panel displays briefly and you will see the prerequisites being processed.
 - b. Next, the Importing Objects panel displays progress bars as the data is imported and extracted. This may take some time to complete.

When the import is complete, you are automatically returned to the General Information panel.

3. On the General Information panel, click Next to import the Common Activities Automation Pack.
 - a. The Review Prerequisites panel displays briefly and you will see the prerequisites being processed.
 - b. Next, the Importing Objects panel displays progress bars as the data is imported and extracted. This may take some time to complete.
 - c. When the import of the common activities is complete, you are automatically returned to the General Information panel once again.

Installing the Cisco IAC Automation Packs

4. On the General Information panel.
5. Click **Next**.
6. Enter the destination for the extracted data, and choose the data to extract (or un-choose, really, as all of the data has been preselected for you).
7. Click **Next** to continue.
8. Once again, the Review Prerequisites panel displays briefly and you will see the prerequisites being processed.
 - a. As before, the Importing Objects panel displays its various progress bars as the data is imported and extracted. This may take some time to complete.
 - b. When the import process is complete, the Automation Pack Import Wizard panel displays.

Installing the Intelligent Automation for Cloud Pack

1. On the General Information panel, review the information about the automation pack. Note that the **Name** field now displays “Intelligent Automation for Cloud.”
2. Click **Next**.
3. On Configure Process Database Grooming panel, specify the number of days to keep process instances in the database. After the specified number of days, the process instances will be deleted from the database. The default value should be satisfactory. Click **Next** to continue.
4. The Data Extraction panel is used to specify the destination where the data is extracted on the Process Orchestrator server. You can simply accept the default location, or browse to specify a different location to extract the files, then click **Next**.
5. The Review Prerequisites panel displays briefly and you will see the prerequisites being processed.
6. Next, the Importing Objects panel displays its various progress bars as the data is imported and extracted. This may take some time to complete.
7. When the import is complete, you are automatically returned to the General Information panel.

Completing the Process

After the objects have been imported, the Final Automation Pack Import Wizard Screen displays.

- Review the information below the “Completing the Automation Pack Import Wizard” heading to verify that all is correct.
 - For Cisco IAC, leave the **Refresh Web Server** check box checked.
 - When you are done reviewing the information here, click **Close** to close the wizard.

You have now successfully installed all supporting software for Cisco Process Orchestrator.



Installing Cisco IAC Components for a Fresh Installation

Be sure to create a backup of both the Cisco Process Orchestrator database and the Cisco Prime Service Catalog database before you install Cisco IAC 4.2.

Important: If you are *upgrading* from Cisco IAC 4.1, see [Upgrading From Previous Cisco IAC Versions, 4.x, 4.x.x to 4.2, page 67](#) instead.

Installing Prime Service Catalog Content

The process of installing PSC using the installation packages consists of three steps:

- Installing the REX Adapter
- Importing and Deploying Portal Packages
- Importing and Deploying PSC Catalogs

These steps are outlined in detail below.

Note: Follow these steps with the post-installation steps, as described in [Post-Installation Tasks, page 27](#).

Importing and Deploying Portal Packages

Cisco IAC ships with packaged image files and portal pages to provide an easy-to-use portal for ordering services.

Note: The zip file unpacks into two high-level folders: Prime Service Catalog and Process Orchestrator. The Service Catalog files are in the Prime Services Catalog folder.

Importing IAC Packages on PSC Windows Environments

Importing the IAC packages on Prime Service Catalog Windows environments with IIS requires the following IIS settings changes. IIS 7.5 has a default limit of 30 MB for all upload file. You can change this limit by performing the following steps:

1. Open Server Manager window.
2. In the first (left-most) panel, expand **Server Manager - Roles - Web Server (IIS) - Internet Information Services (IIS) Manager**.
3. In the second (middle) panel, expand **hostname - Sites - Default Web Site**.
4. Click **Default Web Site**.
5. In the third (middle) panel, click **Request Filtering**.
6. In the fourth (right-most) panel, click the link **Edit Feature Settings...**
7. On the **Edit Request Filtering Settings** popup dialog, change the value for **Maximum allowed content length (Bytes)** from 30,000,000 to a larger number, such as 60,000,000.

8. Click **OK**.
9. Restart **World Wide Web Publishing Service**.

Importing IAC Packages Using the PSC Appliance

- Update timeout at `httpd.conf` :
 - `/etc/httpd/conf/httpd.conf`
 - set timeout to 1600
- An alternative is to deploy the packages going direct to Jboss:
 - `http://applianceIP:8080/RequestCenter`

Copying the Cisco IAC Portlets Package and Extracting Files

1. On the Cisco Process Orchestrator server, navigate to the following folder where `IAC-ServiceCatalog-4.2_xxxx.xxx` was extracted. You will see names along the lines of “`CS_Services_4-2.xml`.”
Note: The file is in a compressed (ZIP) file and will need to be extracted. There is also a ZIP file with the Prime Service Catalog files in it.
2. Extract `IACPortlets-4.2_xxxx.xxx` from the compressed (ZIP) file to a temporary location. It will create an `IACPortlets-4.2_xxxx.xxx` folder.
3. Stop the JBoss application server by stopping:
 - a. Cisco Prime Service Link, and then
 - b. Cisco Prime Service Catalog**Note:** For instructions, see “How to Stop/Start the JBoss Server” in the *Cisco Prime Service Catalog 10.x Installation Guide*. The latest version can be found here:
<http://www.cisco.com/c/en/us/support/cloud-systems-management/prime-service-catalog-10-0/model.html#InstallandUpgradeGuides>
4. In the `IACPortlets-4.2_xxxx.xxx` folder, locate `RequestCenter_war.zip`.
5. Extract `RequestCenter_war.zip` to the following directory (for Windows):
`(JBOSS_DIR)\ServiceCatalogServer\deployments\RequestCenter.war`
Note: Overwrite any existing files, if prompted.
6. Restart the JBoss application server by starting again: Cisco Prime Service Link, and Cisco Prime Service Catalog.

Importing and Deploying Portal Pages

Deploy the Cisco IAC portal page content by importing it from the `PortalPages.xml` portal page file, located in the `IACPortlets` folder.

1. Choose **Portal Designer** from the module drop-down list to open Portal Designer.
2. In Portal Designer, click the **Portal Pages** tab.
3. In the left navigation pane, click **Actions** and choose **Import** from the drop-down list.
4. On the Import Portal Pages dialog box, click the **Overwrite** radio button in the Conflict Resolution field.
5. In the Import from File field, click **Choose File** to navigate to the `IACPortlets` folder that you extracted earlier.

- a. On the Choose File to Upload dialog box, choose the **PortalPages.xml** file and click **Open**.
 - b. On the Import Portal Pages dialog box, click **Import**.
6. Refresh your browser to view the imported portal.

Installing and Configuring the REX Adapter

Note: See [Installing \(or Reinstalling\) the REX Adapter, page 77](#) for details.

Importing and Deploying PSC Catalogs

Complete the following procedure to import and deploy catalogs in Prime Service Catalog. Note that you must be logged into Prime Service Catalog with administrator privileges to perform the procedures.

Installing the Catalogs

1. Open a browser and launch Cisco Prime Service Catalog.
 2. Log into the Prime Service Catalog ServiceCatalog web portal as the site administrator
 3. Choose **Catalog Deployer** from the module drop-down list.
 4. In the Deployment Packages pane, and choose **Action > Import** from the drop-down list.
 5. On the Import Package from File dialog box, click **Browse** to navigate to the folder where you saved the Prime Service Catalog files.
 6. Choose the `SC_Common_4-2_NEW_INSTALL_ONLY.xml` file and click **Import**.
- Note: For new installations, DO NOT import or deploy SC_Common_4-2.xml.**
7. When the message *Package Imported Successfully* displays, click **OK**.

The Deployment Packages window refreshes to display the imported package in the Received for Deployment view.

8. Repeat Steps 4 - 7 again to import `SC_Services_4-2.xml`.
9. Repeat Steps 4 - 7 again to import `SC_Common_4-2_Overwrite.xml`.

Deploying the Catalogs

1. In the Deployment Packages pane, choose **Action > Deploy Multiple Packages** from the drop-down list.
2. On the Choose Packages dialog box, choose the check boxes for `SC_Common_4-2_NEW_INSTALL_ONLY.xml`, `SC_Services_4-2.xml`, and `SC_Common_4-2_Overwrite.xml`.
3. Click **Add**.
4. Check the **Chosen Items** check box and ensure that check boxes for `SC_Common_4-2_NEW_INSTALL_ONLY.xml`, `SC_Services_4-2.xml`, and `SC_Common_4-2_Overwrite.xml` are checked.
5. On the Deploy Multiple Package tab, choose **Add Packages to Deploy**.
6. Click **Deploy**.
7. When each package displays *Succeeded* next to it, you will redeploy `SC_Common_4-2_NEW_INSTALL_ONLY.xml`

- a. On the Choose Packages dialog box, choose the check box one more time for `SC_Common_4-2_NEW_INSTALL_ONLY.xml`.
 - b. Click **Add**.
8. Check the **Chosen Items** check box and ensure that check box for `SC_Common_4-2_NEW_INSTALL_ONLY.xml` is checked.
Warning: It is important that you deploy `SC_Common_4-2_NEW_INSTALL_ONLY.xml` a second time. This is an easily overlooked step which will result in the installation failing down the road.
9. On the Deploy Multiple Package tab, choose **Add Packages to Deploy**.
10. Click **Deploy**.
11. Click **Done**.

Deploying Patches

Patch files, if available, are in the same location as the Cisco IAC 4.2 package files. They are named:

- `SC_Services_Patch_4-2.xml`
- `SC_Common_Patch_4-2.xml`
- `SC_Common_Overwrite_Patch_4-2.xml`

Note: Note that all patches are cumulative. That is, when you deploy the latest patch, it contains all previous patches within it. Therefore, all new and prior patches will all be applied at one time to bring your system fully up to date.

The patch files are deployed like the other package files, and they should be imported/deployed after the main packages. The order is:

- `SC_Common_Patch_4-2.xml`
- `SC_Services_Patch_4-2.xml`
- `SC_Common_Overwrite_Patch_4-2.xml`

1. If necessary, choose **Catalog Deployer** from the module drop-down list within Prime Service Catalog.
2. In the Deployment Packages pane, and choose **Action > Import** from the drop-down list.
3. On the Import Package from File dialog box, click **Browse** to navigate to the folder where you saved the Prime Service Catalog files.
4. Choose `SC_Common_Patch_4-2.xml`
5. Click **Import**.
6. When the message *Package Imported Successfully* displays, click **OK**.

The Deployment Packages window refreshes to display the imported package in the Received for Deployment view.

- Repeat Steps 4 - 6 to import `SC_Services_Patch_4-2.xml` and `SC_Common_Overwrite_Patch_4-2.xml`.
7. In the Deployment Packages pane, choose **Action > Deploy Multiple Packages** from the drop-down list.
 8. On the Choose Packages dialog box, choose the check boxes of packages to deploy, then click **Add**.
- Check the **Chosen Items** check box and ensure the check boxes for `SC_Common_Patch_4-2.xml`, `SC_Services_Patch_4-2.xml` and `SC_Common_Overwrite_Patch_4-2.xml` are checked.

Post-Installation Tasks

9. On the Deploy Multiple Package tab, choose **Add Packages to Deploy**.
10. Click **Deploy**.
11. When each package displays *Succeeded* next to it, click **Done**.

Post-Installation Tasks

Importing US English Localization File

As one of the post-upgrade tasks, you will need to import the US English Localization csv file.

1. Find the `IACPortlets-4.2.xxx` zip file.
2. Extract the US English Localization `.csv` file.
3. Start Cisco Prime Service Catalog.
 - a. Login as admin.
4. Go to **Localization > Javascript Strings**.
5. Go to **Batch Actions > Import** to import the localization `.csv` file you just extracted.
6. Select the **Publish** drop down and choose the US English radio button.
7. Click **Apply**.

Changing Localization Settings

All Prime Service Catalog content (such as headers, service item names, cloud platform elements names, and so on) will be displayed in English unless you import and add translation for content items through Content Strings localization tool.

For example, in order to translate the Home Page header, you would do this:

1. Start Cisco Prime Service Catalog.
2. Login as admin.
3. Select **Localization**.
4. Select the **Content Strings** tab.
5. Select **Portal** from the **Entity** dropdown.
6. From the **Groups** dropdown, select **My Cloud**.
7. From the **Portal Pages** dropdown, select **Home Page**.
8. In the respective language columns, add your translation string of the content to be translated.
9. Click **Save**.
10. Return to the home page to view your changes.

Importing Strings From the Localization Page

Exporting the Language File

1. Log in to Cisco Prime Service Catalog as *admin*.
2. Choose **Switch To > Localization** from the drop-down menu.
3. Choose **Import/Export JavaScript Strings**.
4. Click **Apply**.
5. From the **Batch Action** drop down, choose **Select Action**.
6. Choose **Export**.
7. From the Export Locale Files popup, choose the language you want to export.
8. Click **Export**.
 - A .csv file will be downloaded.

Modifying the .csv Language File

1. Open the .csv file generated above in [Exporting the Language File](#) in an application that supports encoding UTC-8, such as OpenOffice 4.1.1.

Note: Microsoft Excel does not support encoding UTC-8. Thus if you modify the .csv file using Microsoft Excel you may encounter issues within portal after you upload .csv file updated using Microsoft Excel. Such issues entail incorrect display of characters (like éâçèëààÀÈÉÉÛ) after strings are published to the Localization page.
2. Modify (add/update) specific language strings from within that application, as needed.
3. Make sure the encoding is set to **UTC-8**.
4. Save (or export) the modified file in .csv format.

Re-Importing the Modified Language File

1. Log in to Cisco Prime Service Catalog as *admin*.
2. Choose **Switch To > Localization** from the drop-down menu.
3. Choose **Import/Export JavaScript Strings**.
4. From the **Batch Action** drop down, choose **Select Action**.
5. Choose **Import**.
6. From the Import Local Files popup, browse for the modified .csv file you just created in the [Modifying the .csv Language File](#) procedure, above.
7. When you locate the file, choose it and then click **OK**.
8. Back on the Import Local Files popup, click **Import**.
9. When you see the message, *Strings have been successfully imported*, click **OK**.
10. Select **Publish** drop-down on the original page (Localization > Import/Export JavaScript Strings).
11. Click the check box for the language of the strings you updated.

12. Click **Apply**.

13. When you see the message, `Strings in <language> have been published successfully`, click **OK**.

Verifying That the Language Updates Were Imported Correctly

1. Login as any user (*admin* is fine) to Cisco Prime Service Catalog.
2. Choose the **Profile** option next to drop-down menu.
3. On the profile page, choose select the language you modified and imported from the **Preferred Language** drop down.
4. Scroll to the bottom of the Profile page and click **Update**.
5. Navigate to any area(s) within Cisco Prime Service Catalog that are associated with the strings that have been modified.
6. Verify that the text you see has been updated correctly.

Adding Permissions

The following permission needs to be added to roles OTA, TTA and VSO using the Organization Designer after upgrade: “Read all Instance Data and Service Item Instance Data-OpenStack Projects.”

Also, you will need to add/update portal and portlet permissions. In addition, you need to add the following permission for the VSO role: “Needs Order Service - Service-vApp Run Rate.”

Deploying New Cisco IAC 4.2 Management Appliance

After successfully upgrading to Cisco IAC 4.2, you will need to deploy the new Cisco IAC Management appliance. This appliance includes new components such as:

- Prime Performance Manager (PPM)
- Assurance Control
- RabbitMQ
- ACM repository

Note: After deploying appliance, update, update the Cisco IAC 4.2 management appliance platform element using **System Settings > Connections**.

Setting System-Wide Service Options

Set your system-wide service options after you upgrade using the Set System-wide Service Options form:

1. Choose **Setup**.
2. Choose **System Settings**.
3. Choose the **System Settings** tab.

Application Configuration Management Support

To use an existing tenant created in an earlier version of Cisco IAC, your CPBA or CPTA will need to create the “ACMTemplate Rate” table manually.

Note: For instructions on creating the “ACMTemplate Rate” table manually, see the Cisco Intelligent Automation for Cloud Knowledge Base here:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/intelligent-automation-cloud/tsd-products-support-series-home.html>



Optional Tasks

Setting Up Active Directory Integration (If Applicable)

This section provides examples of setting up optional directory integration in Microsoft Active Directory. Because there are many scenarios for directory integration configuration based on the directory product and settings, it is likely that your environment will vary from what is presented here. However, the required sequence of configuring directory integration would be the same.

Cisco Prime Service Catalog can integrate with directory servers to synchronize user information. This synchronization can be initiated whenever a user logs on or is chosen or during Person Lookup in Prime Service Catalog. Prior to configuring integration in Prime Service Catalog, you must have a directory server installed and populated with corporate data.

Note: For instructions on configuring directory integration if your setup varies, see the *Cisco Prime Service Catalog 10.x Integration Guide*. The latest version can be found here:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/prime-service-catalog-10-0/model.html#InstallandUpgradeGuides>

Prerequisites

Before configuring directory integration for use with Cisco IAC, you must complete the following tasks:

- Set up organizational unit structure on the LDAP server. If you do not have privileges to perform this task on the LDAP server, seek help from your LDAP server administrator.
- Create the following user accounts in the Users folder on the LDAP server:
 - nsAPI user
 - A user account (any username) with “Read MemberOf” permissions that will be used for performing authentication, directory searches, and user imports into the Prime Service Catalog.

Note: Cisco IAC 4.2 supports multiple memberships to multiple organizations. However, through Directory Integration these can only be mapped to a *single* organization. After the user has been imported, a CPTA can add the user to additional organizations and assign a Home OU (default organization).

Configuring an LDAP Server

The first step is to add a data source and test the connection in Cisco Prime Service Catalog. The instructions in this section are how one would connect to the LDAP server in the example scenario.

1. Choose **Service Portal** from the module drop-down list, then click the **System Settings** from the **Setup** tab.
2. On the System Setup portal, click the **Connections** tab to open the portlet, then click **Manage Directory Server Connection**.
3. Click **Add** to display the Datasources Configuration pane.
4. In the Add or Edit a Datasource pane, enter the following:

Configuring Authentication

- a. Enter a name for the datasource. Do not use spaces or special characters.
 - b. Enter a description of the datasource. (*Optional.*)
5. Expand **Choose protocol and server product**, then choose the following:
 - a. The protocol is always **LDAP**.
 - b. Choose **MS Active Directory**. (Other server options are **Sun One** or **IBM Tivoli Directory Server**.)
6. Expand **Connection Information**, then specify the following required datasource information in the definition area. This information includes lookup user that you set up as a prerequisite.
 - a. Choose **Simple** (text username and password) from the Authentication Method drop-down list.
 - b. Choose **Non SSL** from the Mechanism drop-down list.
 - c. Enter the bind-distinguished name (BindDN) value for the lookup user. The BindDN looks like the following example:

```
CN=Mehalic Michael,OU=Users,OU=Austin,OU=Texas,OU=USA,DC=notexist,DC=local
```
 - Note:** PSC now supports the use of LAN Manager (down-level logon) formats now. You can still use the BindDN as you have it now but you can also use the format of domainname\username.
 - d. To query the BindDN value, open a command prompt on the Windows server and execute the following command:
 - e. `dsquery user -name "[name]*"`
 - f. Enter the fully qualified hostname or IP address of the LDAP directory server. For example: `dc.notexist.local`
 - g. Enter the parent folder under which all users will gain access.
 - h. For example, if the User BaseDN is `OU=Austin,OU=Texas,OU=USA,DC=notexist,DC=local`, then all users in the Austin organization will have access.
 - i. Enter the port number for the LDAP according to either of the following conditions:
 - For a non-SSL connection, the default port number for LDAP is **389**.
 - For an SSL connection, the default port number for LDAP is **636**.
 - j. You can verify the port number for your LDAP server using either by running the command **netstat -an** on the domain controller, or by using the SysInternals tool **TCPView.exe**.
 - k. Enter the password for the user specified as the BindDN.
7. Click **Update**.
8. Check the check box next to the newly added datasource and click **Test Connection**. The Test Status column displays **OK** if the connection is successful.

Configuring Authentication

Configuring authentication requires completing two tasks: configuring mappings and configuring events. The instructions in this section are how one would complete each task in the example scenario.

Configuring Mappings

The first task in configuring authentication is to assign mapping attributes to user data, including first and last name, login ID, and home organization unit. Active Directory has pre-defined mapping attributes, which are used in this example. However, there are data fields that have no specific Active Directory mapping attributes. In such cases (indicated below), you can assign any mapping attribute that you want to the data field.

1. In the **Administration** module, click the **Directories** tab.
2. On the Directory Integration page, click **Mappings in the** menu on the right.
3. In the Mappings pane, click **Add** to display the Mapping Configuration pane.
4. In the “Add or edit a mapping name” pane, specify the following information:
 - a. Enter a name for the mapping. Do not use spaces or special characters.
 - b. *Optional.* Enter a description of the mapping.
5. In the “Configure mapping attributes” area, enter the required information in the text fields. The following table provides examples of datasource mappings for person data. Active Directory mapping attributes are pre-defined and case-sensitive. For information on how to form expressions, see the documentation that shipped with your directory software.

Table 1 Person Data and Mapped Attributes

Person Data	Mapped Attribute
First Name	givenName
Last Name	sn
Login ID	sAMAccountName
Personal Identification	sAMAccountName For this data field, there is no corresponding mapping attribute in Active Directory. In this case, you can assign any mapping attribute you want.
e-mail Address	expr:#email#=(.+)?(#email#):NotExist
Home Organization Unit	expr:#department#=(.+)?(#department#):NotExist
Password	sAMAccountName There is no mapping attribute for passwords in Active Directory. Instead, you can map it to another attribute (in this example, sAMAccountName). You can also map your own expression. For information, see the documentation that shipped with the Active Directory software.
Optional Person Data Mappings	
TimeZone ID	Example: expr:#sAMAccountName#=(nsapiuser)?(Etc/Greenwich):America/Tijuana
Role List	Example: expr:#memberOf#=(CN=(. *),OU=IAC,OU=Delegation,OU=Groups,OU=Austin,OU=Texas,OU=USA,DC=companyA,DC=local)?(\$1):

6. Click **Update**.

7. Test the mappings using the Data Test Mapping feature.

Note: For instructions on enabling then using the Data Test Mapping feature, see “Testing Mappings” in Chapter 1, “Directory Integration and API,” in the *Cisco Prime Service Catalog 10.0 Integration Guide*. The latest version of the technical reference guides can be found here:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/prime-service-catalog/products-technical-reference-list.html>

Configure Events

1. Click **Events** in the menu on the right.
2. In the Events pane, click **Edit** next to the Login event to display the Event Configuration pane.
3. Choose **Enabled** from the Event Status drop-down list.

4. In the Event Configuration pane, click **Add step**, then specify the following:

- a. Choose **External Authentication**.
- b. Click **Options**, then enter the EUABindDN using the following convention:

```
<netbios domain>\#LoginId#
```

Note: You *must* provide the EUABindDN value, which is critical for login events. This value is case-sensitive. This attribute is a pre-defined Active Directory value. The attribute is different for other directories.

5. Click **Update** to add the information as the first step in the event.
6. Click **Add step**.
7. In the Step 2 row, choose **Import Person** from the Operation drop-down list.
8. From the Mapping drop-down list, choose the mapping name you specified when you defined mappings in the previous process.
9. From the Datasource drop-down list, choose the datasource name that you specified in Step 4, above.
 - a. Click **Options**, then specify the following information in the Event Step area:
 - b. Ensure that the Refresh Person Profile check box is checked.
 - c. Leave the Refresh Period (Hours) field blank. If a value populates the field, delete the value.
 - d. Do not create Group/OU:
 - **Organizational Unit**–*Check* the check box. Checking this option prevents a user from logging in to the Prime Service Catalog Server unless the user’s home organization has been onboarded.
 - **Group**–*Uncheck* the check box.
10. Click **Update** to add the information as Step 2 then click **Update** again.
11. In the Events pane, click **Edit** next to the **Person Lookup for Service Form** event to display the Event Configuration pane.
12. Choose **Enabled** from the Event Status drop-down list.
13. In the Event Configuration pane, click **Add step**, then specify the following information in the Options for Event Step 1 area:
 - a. Choose **Import Person** as the Operation.

Creating a Security Group for Each User Role on the LDAP Server

b. Click **Options**.

- Enter 24 in the Refresh Period (Hours) field.
- Leave all check boxes unchecked.

14. Click **Update** to add the same information as did in Step 1, then click **Update** again.

Creating a Security Group for Each User Role on the LDAP Server

In your directory, create one security group for each user role. The name of each group must exactly match the name of the user role:

- Cloud Provider Technical Administrator
- Cloud Provider Business Administrator
- Tenant Technical Administrator
- Tenant Business Administrator
- Organization Technical Administrator
- Virtual and Physical Server Owner
- Virtual Server Owner
- Solutions Team
- Form Extender

For instructions on creating security groups on your directory server, see the documentation that came with your directory server software.

Note: Cisco Intelligent Automation for Cloud 4.2 supports an individual's membership to just a *single* organizational unit or membership, not multiple organizations.

Adding the nsAPI User to the Cloud Administration Group

The nsAPI user account that you created on the LDAP server is used to connect Prime Service Catalog to Process Orchestrator. For the nsAPI user account to function properly, you must add it to the Cloud Provider Technical Administrator user group that you created in the directory. For instructions on adding a user to a user role group on your directory server, see the documentation that came with your directory server software.

Configuring User Role Mappings

To map the user roles, you specify the location in the directory that contains the six security groups you created for each role.

1. In Service Catalog, choose **Administration** from the module drop-down list, then click **Directories**.
2. On the Directory Integration page, click **Mappings in the** menu on the right.
3. In the Mappings pane, click **Edit** beside the mapping name you created when you configured mappings (see [Configuring Mappings, page 33](#)).
4. Expand **Optional Person Data Mappings** at the bottom of the page.

Enabling Directory Integration

5. In the Role List field at the bottom of the optional mappings list, enter mapping attributes for role list that assigns the user to one of the six Prime Service Catalog user groups that you created in the directory. using the convention used for the example scenario (variables for the example appear in boldface):

```
expr : #memberOf#= (CN= ( . * ) , OU=Groups , OU=Austin , OU=Texas , OU=USA , DC=notexist , DC=local ) ? ( $1 ) :
```

6. Test the mappings using the Data Test Mapping feature.

Note: For instructions on enabling and using the Data Test Mapping feature, see “Testing Mappings” in “Directory Integration and API,” in the *Cisco Prime Service Catalog 10.1 Integration Guide*. The latest version of the technical reference guides can be found here:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/prime-service-catalog/products-technical-reference-list.html>

Enabling Directory Integration

Before you enable directory integration, be sure you have all user groups configured for use with Cisco IAC. If you do not have all user groups configured before you enable directory integration, you will not be able to log back in to Prime Service Catalog.

1. Choose **Administration** from the module drop-down list, then click **Personalize Your Site**.
2. On the **Customizations** page, scroll down to the Common Settings area and turn the Enable Directory Integration setting **On**.
3. Click the **Update** button at the *bottom* of the page.

Administrative On-boarding of User Accounts

1. The Organization Technical Administrator (OTA) navigates to the User Management page which allows him to add users to the organization.
2. The OTA searches the directory (directory integration for the person search event has previously been configured and tested) for people to assign to his provisioning organization. Once the person is found, he is assigned an appropriate Server Owner role.
3. In **Administration > Directories > Events**, configure a login event. The login event should have one operation: to perform Single Sign-on or External Authentication, as desired.
4. Start a new browser session (if using external authentication) or try a single sign-on entry to the Service Catalog, and try to login as a new user, testing the just configured Login event.

Setting Global Variable to store OpenStack Keypairs

Keypairs are required when ordering an OpenStack instances, it can be stored in shared path location to be retrieved by Process Orchestrator on demand during instances creation in order to access instances with private key authentication. This can be either a local path or a share path over network as long as Process orchestrator has proper reachability to that shared path. To configure the Global Variable from Cisco Process Orchestrator:

1. Go to **Definitions > Global Variables**.
2. Right-click on **File Share Path**.
3. Select **Properties**.
4. In general tab change the “value” field to preferred location.



Using the IAC Management Appliance

This section contains instructions for deploying and configuring the Cisco IAC Management Appliance and covers:

- [Deploying the Management Appliance](#)
- [Configuring the Cisco IAC Management Appliance](#)

Note: If you do not intend to use Advanced Network Services (VSA 1.0), connecting to the Cisco IAC Management Appliance is not required.

Deploying the Management Appliance

Deploying the Management Appliance Using VMware vSphere

Install the Cisco IAC 4.2 Management Appliance via a configuration and install wizard accessed via the vSphere Client window. To deploy the Cisco IAC Management Appliance, follow the steps below:

1. Download the OVA file for the Cisco IAC Management Appliance onto the machine where you installed VMware vSphere Client.
2. Launch your VMware vSphere client and connect to a vCenter Server.
3. Choose **File > Deploy OVF Template**.
4. Click **Browse** and navigate to the location where you have saved the OVA file. Choose the OVA file, and then click **Next**.
5. The template details are displayed in the OVF Template Details window. Verify the details, then click **Next**.
6. The End User License Agreement window appears. Read the license agreement, click **Accept**, then click **Next**.
7. In the Name and Location window, specify a name for the virtual machine, and choose the appropriate datacenter and/or folder for the virtual machine. The VM name must be unique within the datacenter and can contain up to 80 characters, excluding the usual special characters owned by the operating system (such as * . / and so on). Click **Next**.
8. The Host or Cluster window may appear depending on your VMware environment. If the Host or Cluster window appears, choose the Cluster or the ESX host where you want the VM to be created.
9. If the Resource Pool window appears, choose a resource pool for the VM.
10. In the Storage window, choose a datastore name that has enough available disk space, then click **Next**. The VM requires up to 40 GB depending on the disk format you will choose in the next step.
11. In the Disk Format window, specify the format for storing the virtual hard disk by clicking the appropriate radio button:
 - Thick Provision Lazy Zeroed
 - Thick Provision Eager Zeroed
 - Thin Provisioning

12. Click **Next**.
13. If the Network Mapping window appears, choose a destination network from the list. Choose a network name has DHCP services available.
14. Click **Next**.
15. In the Ready to Complete window, review the settings.
16. Choose the “**Power on after deployment**” option.
17. Click **Finish**.

Deploying the Management Appliance Using the OpenStack Dashboard

Uploading the Cisco IAC Management Appliance Image File

Follow this procedure to upload the Cisco IAC Management Appliance image to an OpenStack project.

1. Log in to the OpenStack dashboard.
2. From the Current Project on the Project tab, select the appropriate project.
3. On the Project tab, click **Images**.
4. Click **Create Image**.
5. The Create An Image dialog box appears.
6. Enter the following values:
 - a. **Name**. Enter a name for the image.
 - b. **Description**. Enter a brief description of the image (optional).
 - c. **Image Source**. Choose **Image Location**.
 - d. **Image Location**. Enter the image location URL for the Cisco IAC Management Appliance.
 - e. **Format**. Select the correct format, which for Cisco IAC 4.2 is **VMDK** (Virtual Machine Disk).
 - f. **Architecture**. Leave empty.
 - g. **Minimum Disk (GB)**. Leave empty.
 - h. **Minimum RAM (MB)**. Leave empty.
 - i. **Public**. Leave unchecked.
 - j. **Protected**. Leave unchecked.
7. Click **Create Image**.

Note: The IAC VM image is now being uploaded. However, it might take some time for the status to change from Queued to Active.

Creating a Volume for the Appliance

From the OpenStack dashboard, choose the project under which you want to set up the IAC Appliance.

1. Click **Volumes** from the sidebar menu.

2. Click **+ Create Volume**.
3. In the dialog box that opens, enter or select the following values.
 - a. **Volume Name**. Specify a name for the volume.
 - b. **Description**. Enter a brief description for the IAC volume if you want.
 - c. **Volume Source**. Select **Image**.
 - d. **Use image as a source**. Select the IAC 4.2 image from the list.
 - e. **Type**. Leave this field as “No volume type.”
 - f. **Size (GB)**. Enter 40 as the minimum size (you can enter a larger size).
 - g. Select the **Availability Zone** from the list. By default, this value is set to “Any availability zone.”
4. Click **Create Volume**.

A process will run. After some time, the volume you just created now displays in the dashboard on the Volumes tab.

Launching the Instance

1. On the OpenStack dashboard, choose a project, and click **Images** from the sidebar menu. The dashboard shows the images that have been uploaded to OpenStack Image Service and are available for this project.
2. Click **Launch Instance**.
3. In the Launch Instance dialog box, specify the following values:

Details tab

- a. **Availability Zone**. If you selected an availability zone for the Volume in the previous process, you should select the same zone here; for example, **nova**.
 - b. **Instance Name**. Assign a name to the virtual machine.
 - c. **Flavor**. Needs to be a minimum of **m1.medium**, and assumes the following minimum configuration:
 - 2 VCPUs
 - 40 GB disk
 - 4 GB RAM
- Note.** The flavor is selected based on the size of the image selected for launching an instance. For example, while creating an image, if you have entered the value in the Minimum RAM (MB) field as 40 GB, then on selecting the image, the default flavor is m1.medium. (Assuming the flavors are still set to the OpenStack defaults.)
- d. **Instance Count**. To launch multiple instances, enter a value greater than 1 (the default is 1).
 - e. **Instance Boot Source**. Select Boot from volume.
 - f. **Volume**. Select the volume you created earlier from this list.
 - g. **Delete on Terminate**. Check this if you want the instance and volume deleted on terminate (optional).

Access & Security tab

- **Key Pair**. Do **not** select a key pair.

- **Security Groups.** Choose an appropriate security group, as required by your organization, if any. If you have not created any security groups, you can assign only the default security group to the instance. The “default” option works fine with the Cisco IAC Management Appliance.

Networking tab

The IAC VM works best with an internal network to OpenStack which is hooked up to a router. That router should be connected to the external network (that is, a globally-routed network within your organization).

- To add a network to the instance, click the + sign next to the internal network you want to use from the **Available Networks** list.

Post-Creation tab

- Leave defaults.

Advanced Options tab

- Leave defaults.

4. Click **Launch**.

The instance starts on a compute node in the cloud. You will see an animated progress bar while the instance is spawning. When finished, the Instances tab will display information on the instance such as its name, its private and public IP addresses, size, status, task, and power state.

Allocating a Floating IP Address to the Instance

Anytime an instance is created in OpenStack, it automatically has a fixed IP address assigned to it in the network. This IP address is associated with the instance until which time the instance is terminated. Along with the fixed IP, a floating IP can also be attached to an instance. Floating IP addresses can have their associations changed at any time.

1. From the OpenStack dashboard, choose a project, and click **Access & Security** from the sidebar menu.
2. Click the **Floating IPs** tab.
3. Click **Allocate IP to Project**.
4. On the Allocate Floating IP dialog box, choose the **Pool** from which to pick the IP address.
5. Click **Allocate IP**.
6. On the Manage Floating IP Associations form, click **Associate**.
7. In the Manage Floating IP Associations dialog box, choose the following options:
 - a. The **IP Address** field is filled automatically, but you can add a new IP address by clicking the + button.
 - b. In the **Ports to be associated** field, select a port from the list. The list shows all the instances with their fixed IP addresses. You want the instance you just created in the previous procedure.
8. Click **Associate**.

You now have an external, reachable address that you can use to connect to and perform actions with using the Cisco IAC Management Appliance.

Locating the Console After Deployment

OpenStack

1. From the OpenStack dashboard, choose **Instances** from the left sidebar menu.
2. Select the new Instance you created here.

3. From the **Actions drop down list at the right of the instance's row, select **Console**.**

- The instance console automatically loads, along with the first prompt for the Cisco IAC Management Appliance configuration.

VMWare

If you did not select Power on after deployment, Power on your appliance VM, your virtual machine is listed in the left pane of the vSphere Client under the appropriate host or cluster after the OVF Template deployment is complete. While your VM powers up, follow the console, a first boot script will prompt you for some configuration information. Answer all information, as explained next.

Configuring the Cisco IAC Management Appliance

You can configure the Management Appliance using either VMWare or OpenStack. The process is the same.

Warning: Do NOT CTRL-C if you make a mistake going through the 19 prompts listed below.

- *Please wait until you have gone through all of the prompts (even if you just hit ENTER for each remaining prompt after your error).*
- You will be given a chance at the end of the script to review and re-enter your information.

To configure the appliance via OpenStack, follow the steps below.

1. You will see this prompt first:

```
Please enter value for VM Property "Appliance Hostname":
```

- Enter a new hostname for this virtual machine. You may enter an unqualified host name (such as "mycomputer") or a fully-qualified domain name (such as "mycomputer.example.com"). A host name may contain letters, digits, and dashes (-).
- Press ENTER.

2. You will see this prompt next:

```
Please enter password for "Operating System Root Password":
```

- Enter a new password for the Linux "root" superuser account.
- Press ENTER.
- Re-enter the password and press ENTER again.

3. You will see the next prompt:

```
Please enter password for "Administrator Password":
```

- Enter a password for the Cisco IAC Management Appliance Administrator. This will also be the password for the operating system's "cisco" user.
- Press ENTER.
- Re-enter the password and press ENTER again.

4. You will see the next prompt:

```
Please enter password for VM Property "Administrator Email":
```

Configuring the Cisco IAC Management Appliance

- a. Enter the email address for Cisco IAC Management Appliance Administrator. This is used as the sender address for all system-level email notifications.

- b. Press ENTER.

5. You will see the next prompt:

Please enter password for VM Property "Email Server Hostname":

- a. Enter the hostname or IP address for the SMTP server used for sending email messages.

- b. Press ENTER.

6. You will see the next prompt:

Please enter Yes/No for VM Property "Enable SSL support":

- a. Enter **Y** or **Yes** to enable SSL support. A self-signed certificate will be generated.

Note: The self-signed SSL certificate can be replaced with a valid SSL certificate after the Cisco IAC Management Appliance has been deployed.

- b. Press ENTER.

7. You will see the next prompt:

Please enter value for VM Property "Time Zone":

- a. Enter the time zone in UTC (Universal Time Code) format, such as **"UTC-5"** for Eastern Time. This is sometimes also referred to as GMT, or Greenwich Mean Time.

Note: You must include the text, UTC, as well as the number of hours either before or after the Prime Meridian, as a negative (-) or positive (+) number. There should be no spaces. For example, UTC+8. For additional help, see https://en.wikipedia.org/wiki/List_of_UTC_time_offsets.

- b. Press ENTER.

8. You will see the next prompt:

Please enter Yes/No for VM Property "Enable NTP support":

- a. Enter **Y** or **Yes** to enable the NTP client.

- b. Press ENTER.

9. You will see the next prompt:

Please enter value for VM Property "NTP Server IP/Hostname":

- a. Enter the IP address or host name for your NTP server.

Note: Leave this option blank if NTP is not enabled above or a value is supplied by your DHCP server. This value will be overridden by the NTP server supplied by your DHCP server.

- b. Press ENTER.

10. You will see the next prompt:

Please enter value for VM Property "PostgreSQL System DBA Password":

Note: The Management Appliance's credential manager uses a PostgreSQL database.

- a. Enter a password for the database administrative accounts ("postgres"). Alphanumeric characters only.

Configuring the Cisco IAC Management Appliance

- b. Press ENTER.
- c. Re-enter the password and press ENTER again.

11. You will see the next prompt:

Please enter Yes/No for VM Property "Enable Prime Performance Manager":

- a. Enter **Y** or **Yes** to enable the Prime Performance Manager (PPM) server.

Note: The web interface will be available from `https://<hostname>/ppm`. You can log into the PPM with the username "cisco" and the administrator password defined above.

- b. Press ENTER.

12. You will see the next prompt:

Please enter value for VM Property "Process Orchestrator Fully Qualified Domain Name":

- a. Enter the Cisco Process Orchestrator's fully qualified domain name, or IP address. The Management Appliance must communicate with a process orchestrator in order to perform network discovery.
- b. Press ENTER.

13. You will see the next prompt:

Please enter "basic" or "windows" for VM Property "Process Orchestrator Authentication Type":

- a. Enter either the word "basic" or the word "windows" at this prompt.

Note: Windows authentication here means NTLM.

- b. Press ENTER.

14. You will see the next prompt:

Please enter value for VM Property "Process Orchestrator Port (Default:61527)":

- a. Enter the port that the Management Appliance will use to communicate with the Process Orchestrator. The default is 61527.

Tip: To accept the default value of 61527 without having to type it in, just press ENTER.

- b. Press ENTER to continue.

15. You will see the next prompt:

Please enter value for VM Property "Process Orchestrator Username":

- a. Enter the username the Management Appliance will use to authenticate with the Process Orchestrator.
- b. Press ENTER.

16. You will see the next prompt:

Please enter password for "Process Orchestrator Password":

- a. Enter the password the Management Appliance will use to authenticate with the Process Orchestrator.
- b. Press ENTER.
- c. Re-enter the password and press ENTER again.

17. You will see the next prompt:

Please enter value for VM Property "Process Orchestrator Domain (Windows NTLM)":

a. If you entered "windows" earlier as authentication type (Step 13. on page 43, above), enter the domain here.

Note: Leave blank if you entered "basic" as the authentication type at Step 13. on page 43, above.

b. Press ENTER.

18. You will see the next prompt:

Please enter password for "Assurance Control Password":

a. Enter the password required to authenticate with the Management Appliance's Assurance Control API.

b. Press ENTER.

Note: This password must also be entered into the "Assurance Control Password" field when setting up the Cisco IAC Management Appliance cloud infrastructure element in Cisco Prime Service Catalog.

c. Re-enter the password and press ENTER again.

The summary information displays for your review (note that none of the passwords you entered are shown here, for security reasons):

Key :	"HOSTNAME"	Value :	"hostname"
Key :	"CCP_ADMIN_EMAIL"	Value :	user@company.com
Key :	"SMTP_HOSTNAME"	Value :	"smtp.company.com"
Key :	"CPSC_SSL_SUPPORT"	Value :	"False"
Key :	"vami.timezone"	Value :	"UTC-5"
Key :	"NTP_SUPPORT"	Value :	"True"
Key :	"NTP_SERVER"	Value :	"10.201.76.2"
Key :	"PPM_SUPPORT"	Value :	"True"
Key :	"PO_FQDN"	Value :	"aus-po1.domain.local"
Key :	"PO_AUTH_TYPE"	Value :	"Basic Authentication"
Key :	"PO_PORT"	Value :	"61527"
Key :	"PO_AUTH_USER"	Value :	"user"
Key :	"PO_AUTH_NT_DOMAIN"	Value :	"domain.local"

Please review all VM properties

Please type "save" if all properties are correct

Please type "redo" if you want REDO the configuration : redo

19. From the confirmation summary, type:

- **save** and press ENTER to continue,

or type

- **redo** press ENTER to repeat the prompts and provide ALL values all over again.

Note: Once all values are entered and you have selected **Save**, the first boot script will continue. This process can take up to 30 minutes or longer.

Note: When the power up is complete, you can access the Cisco IAC Management Appliance by pointing your web browser to the dynamically-assigned IP address or to the Appliance's hostname, if DNS services are available.



Configuring Cisco IAC With the Wizard

The Cisco Intelligent Automation for Cloud 4.2 Configuration Wizard guides you through the steps for setting up and configuring the cloud administration and infrastructure.

Accessing the Configuration Wizard

Special Note if Using the PSC Appliance

Because the Cisco Prime Service Catalog appliance has Prime Service Catalog ports 8080 and 6080 blocked by the firewall, you will need to open these ports before accessing the IAC Configuration Wizard. You use the Manage Firewall menu, accessible via the Linux OS Shelladmin Menu to open firewall ports as needed.

1. Login to the Linux operating system as the **shelladmin** user.

Note: You can do this via the VM Console in your vSphere Client, or via an SSH connection to the IP address of the virtual machine (VM).

2. On the Linux Login Prompt, type **shelladmin** for the user name, and **Cisco1234!** for the password.

- Once logged in, you will see the following Shelladmin Menu:

```
Standalone Mode

Select a number from the menu below

1) Manage Users
2) Display Service: Status
3) Stop Services
4) Start Services
5) Manage Databases
6) Manage Firewall
7) Manage Puppet Master
8) View/Configure Network Interface
9) View/Configure SHIP
10) View Logs
11) Show Version
12) Apply Patch
13) Login as Root
14) Shutdown Appliance
15) Reboot Appliance
16) Quit
```

3. To choose Manage Firewall, enter **6** at the **SELECT>** prompt and press ENTER.

- You will next see a menu that enables the opening of port numbers for certain services.

4. Select **Open Service Catalog Application Server Port**.

5. Select **Open Service Link Application Server Port**.

6. Select **Quit** and then select **Quit** at the Shelladmin menu.

Starting the Configuration Wizard

1. Open a browser and launch Cisco Prime Service Catalog.
2. Log in as a **Site Administrator**.
3. To access the Cisco Intelligent Automation for Cloud Configuration Wizard:
 - a. Choose **Service Portal from the menu at the top right of the screen**.
 - b. Choose **Setup** from the Cisco IAC 4.2 menu
 - c. Choose **Configuration Wizard** from the Setup sub-menu.
4. The Configuration Wizard for Cisco IAC 4.2 displays.

The Wizard Welcome Screen

Setting the Custom Styles Directory

Note: If you are configuring IAC using the IAC Virtual Appliance, you can skip this section and proceed to [Configuring Agent Properties, page 48](#).

Verify that Cisco IAC is chosen and that Site Administration is associated with this style. To do so, complete these steps.

1. Click the **Set Custom Styles Directory** link on the Welcome tab on the Cisco IAC 4.2 Config Wizard.
2. Click **Custom Styles** in the right menu (it may already be selected).
3. In the **Name** field, enter **Cisco Intelligent Automation for Cloud 4.2**.
4. Check the **Make this Style the default for the entire site** check box.
5. On the Style Directory field, click **Browse**.
6. Click the **IAC** radio button.
7. Click **OK**.
8. Click **Add** (it is located toward the bottom middle of the screen) to open the Custom Style Properties window.
9. On the Custom Style Properties pop-up window, click **Search** to browse for the organizational units to which to associate the custom style properties.
10. Close the popup window and close the Custom Styles window to return to the Configuration Wizard.

Note: The Administration page of the Cisco Prime Service Catalog works only on specific browsers. See the *Cisco Prime Service Catalog Compatibility Matrix* for more information. The latest version of the documentation can be found here: <http://www.cisco.com/c/en/us/support/cloud-systems-management/prime-service-catalog-10-0/model.html#InstallandUpgradeGuides>

Configuring Agent Properties

On the **STEP 1** panel of the Cisco Intelligent Automation for Cloud Configuration Wizard, you configure agent properties for all REX agents and HTTP agents.

Note: Instructions on how to create the REX Agent and NSAPI accounts also appear elsewhere in this manual. So, if you have already done so, you can skip that step now.

Creating Service Accounts for Both REX Agent and nsAPI Users

Service accounts for the REX adapter and nsAPI are required to connect Cisco Prime Service Catalog to the REX adapter and Process Orchestrator, respectively.

Note: You need to be logged in as a site administrator to complete the steps in this section.

Creating the Service Accounts for REX Agent and nsAPI Users

1. From the Wizard, choose **Create service accounts for both REX Agent and nsAPI users**.
2. On the Organization Designer page, click **Create Person** from the Common Tasks panel (on the left of the screen).
3. On the Create Person form, set up the REX user:
 - d. Enter “REX” as the **First Name** and “User” as the **Last Name**.
 - e. Enter a valid, actively monitored e-mail address. This will be the address where notifications relating to the REX adapter user account will be sent.

Note: Consider using the email address of a CPTA or a distribution list for all CPTAs.

- a. Choose **(GMT) Greenwich Mean Time** from the drop-down list.
- b. In the current release, only US English is supported; any language selection you make will be ignored

Note: If you are using the Cisco IAC Virtual Appliance, some or all of this information may have been entered for you.

- a. Browse to choose an Organizational Unit. Click **Search**, click the **Site Administration** radio button, then click **Add**.
- b. *Optional.* Enter a description or any information pertinent to the user account in the **Notes** field.
- c. Enter **REXuser** as the **Login**.
- d. Enter, then enter re-enter (to confirm) the password for the REX user account.

4. Click **Create** to create the new user.

Note: Once the user has been created, the **People** tab contents should automatically display, showing the user information you just entered. If you need to make corrections, make them before proceeding to the next step.

Creating the Service Account for nsAPI User

Note: This step is *optional* if you intend to enable Directory Integration.

1. Back on Organization Designer page, choose the **People** tab at the top of the page, if necessary.
2. Click **Copy** (upper right of the screen) to create a copy of the REX user that will be named “nsAPI User”.

Note: If you are using the Virtual Appliance, this information may have been entered for you.

On the Create Person form:

- a. Enter “nsAPI” as the **First Name** and “User” as the **Last Name**.
- b. Enter a valid, actively monitored e-mail address. This will be the address where notifications relating to the nsAPI user account will be sent.

Note: Consider using the email address of a CPTA or a DL for all CPTAs.

- Choose **(GMT) Greenwich Mean Time** from the drop-down list if it is not already filled in.

- As before, only US English is supported; any language selection you make will be ignored.
 - Browse to open the Choose an Organizational Unit dialog box.
 - Click **Search**.
 - Click the **Site Administration** radio button
 - Click the **People** tab and then click **Add**.
 - Enter **nsAPI** as the **Login**.
 - Enter, then confirm password for the nsAPI user account you created earlier.
3. Click **Create** to close the form.

You will be returned to the Organization Designer.

Setting the Calendar for the nsAPI User

1. In Organization Designer, click to access, or ensure that you are on, the **People** tab.
2. In the People pane on the left side of the window, locate the line and click the name nsAPI user record.
3. From the menu on the right side of the page, choose **Calendar**:
4. In the Calendar pane, change all time values in the **To** column to **11:59 PM**.
5. Change times in the **From** column to 12:00 AM if not already done so (as it is for Sunday/Saturday).
Note: By default, Monday through Friday start at 9:00 AM, making for a 24-hour calendar.
6. Click **Update**.
7. When your are done, click **Close** in the pop up window.

You will be returned to your location on the wizard.

Setting Username and Password for 'REX Set REX Agent Properties'

1. From the Wizard, choose Set username and password for the 'REX Set REX Agent Properties' agent
2. In the Agents pane on the left, expand **REX Set REX Agent Properties**.
3. Click **Outbound Properties**.
4. In the **REXOutboundAdapter.Username** field, enter the REX login name you created on the Create Person form.
5. In the **REXOutboundAdapter.Password** field, enter the REX password in the Create Person form.
6. Click **Save**.
7. Click **Close**.

You will be returned to your location on the wizard.

Starting the REX Set REX Agent Properties Agent

1. From the Wizard, choose Start 'REX Set REX Agent Properties' agent

Note: If you do not see "REX Set REX Agent Properties" in the list, scroll down or use the pagination at the bottom to navigate to the other pages. Or, sort by agent name by clicking the Name column heading.

2. Click the red icons next to **REX Set REX Agent Properties**.
3. Click the **Start Chosen** button up at the top right corner of the page.
 - The red icons turn to green, indicating that they are now sending and receiving.

Note: In some cases, you may need to refresh the page before you see the colors change. To do so, click the **Refresh** icon.
4. Close AFC.

Setting REX Agent Configuration

Configure all of the REX agent properties, then verify that the agents are configured correctly.

1. From the Wizard, choose Set REX Agent Configuration
2. On the Set REX Agent Configuration form, enter the REX account login name, then enter and re-enter the REX account password.
3. Enter the URL to the Prime Service Catalog Request Center server in the **Cloud Portal Request Center URL** field.

Note: The URL should include http or https, the hostname and port number, and the pathname to ServiceCatalog. For example, http://localhost:8080/ServiceCatalog.

4. Click **Submit Order** to submit the form and display the Order Confirmation page for the service that you ordered.
5. Click on the number in the **Requisition Number** field to display the details.
6. In the Requisition Details pane, click the requisition number in the **Requisition Number** field to refresh the status.

Note: Repeat this refresh process as many times as needed until the status is **Completed**.

7. Click **Close** to return to the Configuration Wizard.

Starting All REX Agents

You will next start all REX agents; that is, all agents with REX in the name. The current list includes the following eleven REX agents:

1. REX Add Organization Unit
2. REX Add Organization Unit (Tenant)
3. REX Add Person
4. REX Create Queue
5. REX Deactivate OU
6. REX Delete Queue
7. REX Modify Organization Unit
8. REX Set DB Agent Properties
9. REX Set HTTP Agent Properties
10. REX Set NSAPI Agent Properties

11. REX Set REX Agent Properties (already started in a previous step)

1. From the Wizard, choose Start All REX Agents.
2. On the Control Agents Tab of the Service Links portal, click the red symbol next to any and all agents on the page where the outbound adapter is **REX adapter**.

Note: Be careful. Clicking the text line for an agent may not actually choose that agent. Instead, it may navigate away from the Control Agents page.

- Click **Start Chosen**.
- Click **Yes**.

The red icons will turn to green after a bit, indicating that they are now sending and receiving. In some cases, you may need to refresh the page before you see the colors change. To do so, click the **Refresh** icon at the bottom of the page.

- Repeat for all pages.

Note: Where possible, press and HOLD the **Shift** key. Then, click the first REX agent in a long list. Scroll and then (with the **Shift** key still pressed) click the last REX agent visible in the list on the page to quickly choose that group of REX agents. If a vertical scroll bar appears in the list, scroll to choose the last agent on the page.

Note: There may have been additional REX agents in the list that you were not able to see (and therefore, activate). To find them, use the scroll arrow at the bottom of the list. You may need to use the “next page” button at the bottom of the screen, as well, to find all remaining REX agents.

3. Click **Close** to close this form to return to the Configuration Wizard.

Configuring a DB Agent

This step configures the credentials to connect to the database.

1. From the Wizard, choose Configure DB Agent.
2. From the Set Agent Configuration form, complete the following:
 - a. Set Agent Type to DB (should already be set, but be sure to check).
 - b. Enter a username and password.
 - c. Reenter the password to confirm.

Note: The username would match the Cisco Prime Service Catalog database information. Normally, this would be “CPSCUSER.”

3. Enter the appropriate URL (either MS SQL or Oracle, depending on your setup) into the **JDBC URL** field, for example:

- MS SQL:

```
jdbc:sqlserver://localhost:1433;DatabaseName=ServiceCatalog;selectMethod=direct;sendStringParameter  
sAsUnicode=true
```

- Oracle)

```
jdbc:oracle:thin:@localhost:1521:orcl
```

Note: This is the connection to the Cisco Prime Service Catalog database. You will need to change the example provided to replace `localhost` with the address to your actual database server. Only use `localhost` if you are using the built-in Oracle server. (But use the built-in Oracle server only as a test or proof of concept server. Also, ensure the port number being used matches the port number you have set up for your database implementation (the port numbers provided are the defaults as defined by Microsoft or Oracle).

Note: Cisco Prime Service Catalog does not allow you to copy text from certain fields. This is why you must type this URL into the JDBC URL field.

4. Enter the appropriate URL (either MS SQL or Oracle, depending on your setup) into the **JDBC Driver Class** field.

Note: Be sure there are no spaces at the beginning or the end of the string.

5. Click **Submit Order**.

Note: Monitor this requisition to be sure it completes. Only move on once you are certain that the requisition has completed.

Starting a DB Agent

Follow these steps to enter credentials for connecting to the database.

1. From the Wizard, choose Start DB Agent.
2. Navigate to the page with the agent.
3. On the Control Agents Tab of the Service Links portal, choose **Insert Default Parameters**.
4. Click **Start Chosen**, and then click **Yes** to confirm.
5. Refresh the page and the red light icon next to **Insert Default Parameters** will turn green.
6. Choose **Portal Page Assignment to OU**.
7. Navigate to the page with that agent.
8. Click **Start Chosen**, and then click **Yes** to confirm.
9. Refresh the page until the red light icon next to **Portal Page Assignment to OU** turns green.
10. Click **Close**.

Configuring the nsAPI Agent

To configure the nsAPI agent:

1. From the Wizard, choose Configure NSAPI Agent.
2. On the Set Agent Configuration form, complete the following:
 - a. Set Agent Type to NSAPI (may already be set; be sure to check).
 - b. Choose **Basic** as the Authentication Scheme.

Note: This value must be set to “Basic,” otherwise nsAPI will not function correctly and you will not be able to properly continue Day 0 setup.

- c. Enter the nsAPI username and password (as created earlier).
- d. Reenter the password to confirm.

3. Click **Submit Order.**

Note: Monitor this requisition to be sure it completes. Refresh as needed. Only move on once you are certain that the requisition has completed.

Starting the nsAPI Agent

1. From the Wizard, choose Start NSAPI Agent.
2. On the Control Agents Tab of the Service Links portal, choose **Retrieve OU ID on Name**.
3. Navigate to the page (it may be a few pages in).
4. Click **Start Chosen**.
5. Click **Yes** to confirm.
6. Click **Close**.

Setting Up Cloud Administration

Adding a Cloud Administrator Organization

On the **STEP 2** panel of the Cisco IAC Configuration Wizard, you create the home organization for **Cloud Provider Technical Administrators (CPTA)**. CPTAs manage cloud resources and services via the service catalog. They have access to internal network and systems (underlying cloud infrastructure) and onboard/offboard tenants.

Once you have set up the Cloud Organization, you are returned to **STEP 2**. At that time (after the Wizard redisplay), the link for “Add Cloud Administration Organization” has been removed. This is to ensure that you do not inadvertently run that task more than once.

1. From the Wizard, choose Add Cloud Administrator Organization.
2. On the Add Cloud Administration Organization form, enter the following:
 - a. Cloud Admin Organization Name (required)
 - b. Organization Description (optional)
 - c. Company Abbreviation (required; maximum 4 characters)
3. Click **Submit Order**.
4. Click on the number in the **Requisition Number** field to display the details.
5. Click **Close** when the status says **Completed**.

Note: Monitor and refresh screen as needed. Only move on once you are certain that the process has completed.

Adding Cloud Administrators

1. From the Wizard, choose Add Cloud Administrator.
2. On the Add Cloud Administrator form, choose **Create New User** from the drop-down to display the fields for creating a new user as a Cloud Administrator.
3. Provide the following information:
 - a. Enter the first and last name of the new Cloud Provider Technical Administrator.

- b. Enter a unique login identifier for the Cloud Provider Technical Administrator.
 - c. Enter the new Cloud Administrator's e-mail address.
 - d. From the drop-down list, choose the time zone associated with the new CA's primary address.
 - e. Enter then re-enter the password for the new Cloud Administrator.
4. Click on the number in the **Requisition Number** field to display the details.
 5. Click **Submit Order**.
 6. Click **Close** when the status says **Completed**.

Note: Monitor and refresh screen as needed. Only move on once you are certain that the process has completed.

Adding Cloud Administrators: Directory Service Users Only

This section applies *only* if you are using a directory service to import user and organization data. Before you proceed, directory integration must be set up. After you set up directory integration, users are automatically imported when they log in, and their Prime Service Catalog roles are automatically assigned based on the user groups to which they were added in the directory.

- User roles are assigned when you define group role mappings during directory integration setup (as shown in [Adding the nsAPI User to the Cloud Administration Group, page 35](#)).
- You assign the Cloud Administrator role to a user from the directory, rather than from Cisco Prime Service Catalog, by adding the user to the Cloud Administrator user group in the directory.

Making nsAPI a Cloud Provider Technical Administrator

1. From the Wizard, choose Make nsAPI a Cloud Provider Technical Administrator.
2. On the Add Cloud Administrator page, click **Choose an Existing User**.
3. Choose the nsAPI user and then click **Submit Order**. You may see a popup displays the following message:

The user you have chosen currently belongs to another organization. Assigning the Cloud Administrator role will automatically set user organization to the Cloud Administrator Organization. If you want to assign the role but not modify the Organization. you can do so through Organization Designer

4. Click on the number in the **Requisition Number** field to display the details.
5. Click **Close** when the status says **Completed**.

Adding Site Administrator Role to nsAPI User

If you are using a directory service, see the information in the following section, [Adding Cloud Administrators, page 54](#).

1. From the Wizard, Step 2, click Add Site Administrator role to nsAPI user.
2. Choose the nsAPI user.
3. Choose **Roles** on the right of the screen.
4. Click **Add** under the list of Roles first to open the search bar.
5. Search for "Site Administrator".

6. Check the **Site Administrator** check box.
7. Click **Add** and click **Close**.

Connecting Cisco Process Orchestrator

Here, you register and connect the various platform elements to be used for the cloud. This setup must be completed before any further setup or usage of the cloud environment can take place.

1. From the Wizard, choose Connect Cisco Process Orchestrator.
2. On the Connect Cloud Infrastructure Screen, choose Cisco Process Orchestrator.
 - a. Enter **Connection Name** (optional)
 - b. Verify the Cloud Portal **Host Name** and **Port Numbers**.
 - c. Ensure Cloud Portal **Connection Encrypted** option is set to False.

Note: The Connection Encrypted is set to “False” by default. Setting to “True” would require SSL being set up and enabled on Cisco Process Orchestrator, which is not required for Cisco IAC 4.2.

- d. Enter the **NSAPI username**.
 - e. Enter the **NSAPI Password**.
 - f. Enter the Process Orchestrator **Connection Name** (optional)
 - g. Enter the Process Orchestrator **Host Name**.
 - h. Verify the Process Orchestrator **Port Number**.
 - i. Enter the Process Orchestrator **Administrator username**.
 - j. Enter the Process Orchestrator **Administrator Domain** (if applicable).
 - k. Ensure Process Orchestrator **Connection Encrypted** option is set to False.
 - l. Choose the Process Orchestrator **Authentication Scheme**.
 - m. Enter the Process Orchestrator **Administrator Password**.
3. Click **Submit Order**.

Setting PO Values

1. Click on the number in the **Requisition Number** field to display the details.

Note: This task of setting the Process Orchestrator values cannot complete until all agents are started, which includes Process Orchestrator. Without the agents running, the process can not complete.

2. Enter the Service Link Port for Cisco Cloud Portal.
3. Enter the host name or IP address of the Cisco Cloud Portal.
4. Enter the Request Center Port for Cisco Cloud Portal.
5. Click **Close**.

Re-Starting Manage CPO Platform Elements Agent

The first steps of the process you initiated in [Connecting Cisco Process Orchestrator](#) (above) is to configure HTTP agents. But because the CPO PE agent isn't correctly configured yet, the process will temporarily stall. So you need to go re-start this agent to cause the process to continue as planned.

Note: Wait for a few minutes after you initiate the [Connecting Cisco Process Orchestrator](#) process before completing the steps below to be sure the process is running. (It can take a few minutes to start.)

1. Open your browser and start Cisco Prime Service Catalog.
2. Select **Service Item Manager** from the drop-down list in the upper right.
3. Select the **Manage Standards** tab.
4. Expand the **Service Options** folder.
5. Select **Agent Configuration**.
6. Select **Manage CPO Platform Elements**.
7. Select **HTTP** as the **Agent Type** to start the CPO Platform Elements agent.
8. Exit.

Starting All Other Agents

Finally, you need to start all of the other agents in order to successfully finish this procedure. Wait for at least two minutes before starting this step.

1. From the Wizard, choose **Start all other agents**.
2. On the Control Agents Tab of the Service Links portal, choose every single agent on every page with a red light icon.
3. Click **Start Chosen**, and then click **Yes** to confirm.
4. The red light icon next to all the remaining agents will turn green. To see if they turn green, click **Refresh** (bottom right corner) to check the new status.
Note: There may have been additional agents in the list that you were not able to see (and therefore, activate). To find agents, use the scroll arrow at the bottom of the list or the "next page" button at the bottom of the screen.
5. Click **Close** when **completed**.

Initializing Cisco IAC Licensing

1. From the Wizard, choose Initialize licensing.
2. Click **Submit Order**.
3. Click on the number in the **Requisition Number** field to display the details.
4. Click **Close** when the status says **Completed**.

Connecting to the Cloud Infrastructure

On the **STEP 3** panel of the Configuration Wizard, you define the connection information for the platform elements that will be used in Cisco IAC. This information will be used by Cisco Process Orchestrator to integrate with the various components involved in the cloud provisioning processes.

Note: This step needs to be repeated multiple times for each Platform Element Infrastructure item with which you intend to connect.

1. *Log out* of Cisco IAC, close your browser, and then restart it.
2. *Log back in* to Cisco Intelligent Automation for Cloud as the Cloud Provider Technical Administrator (CPTA) you created previously. (See [Adding Cloud Administrators, page 54.](#))
3. Once back in, start the Wizard again. Choose **Setup** > Configuration Wizard.
4. Click **Next**.

You will be returned to **STEP 3** of the Wizard, with two new tasks to complete.

Connecting Cisco IAC Management Appliance (Optional)

Note: If you do not intend to use Advanced Network Services (VSA 1.0), then connecting a Cisco IAC Management Appliance is not required. Or you can use PPM for OpenStack Assurance control.

1. From the Wizard, choose Connect Cisco IAC Management Appliance.
2. On the Connect Cloud Infrastructure form, do the following:
 - a. Choose the **Platform Element Type**.
 - b. Enter a **Connection Name**, **Host Name**, **Description**, and **Port** number.
 - c. Set **Secure Connection** and **Ignore Certificate Error** to either True or False, as needed.
 - d. Enter the **Assurance Control Password** and **User Name**.
 - e. Enter the **Administrator Password** and **User Name**. Reenter the password to confirm. If you are using the Cisco IAC Virtual Appliance, the user is “admin,” and the password is the one you specified earlier.

Note: If you are using the Cisco IAC Virtual Appliance, some of this information has been already entered for you.

3. Click **Submit Order**.
4. Click on the number in the **Requisition Number** field to display the details.
5. Click **Close** when the status says **Completed**.

Connecting Cloud Infrastructure

You can connect to any infrastructure of your choosing, including VMware, UCS Director, Amazon EC2, OpenStack, Chef, Puppet, the Management Appliance, and PNSC, among others.

Note: You have to add at least one Cloud Platform Element before you can proceed to Step 4 of the Wizard.

Note: Below are the specific instructions for vCenter, but these will be similar for any Platform Element. For more information, see the *Cisco Intelligent Automation for Cloud Administration Guide*.

1. From the Wizard, choose Connect Cloud Infrastructure.
2. On the Connect Cloud Infrastructure form, under Connect VMware vCenter Server, do the following:

Discovering Cloud Infrastructure (Optional)

- a. Choose VMware vCenter as the **Platform Element Type**.
- b. Enter a **Connection Name (Friendly Name)**.
- c. Enter a **Host Name**, a **Port** number and a **Description**.
- d. Set the following to either True or False, as needed:
 - **Secure Connection**
 - **Ignore Certificate Error**
 - **Managed by UCS Director**
- e. Enter **username** and **Password**, then reenter the password to confirm.

Note: You may need to enter the domain name before the username followed by a backslash.

3. Click **Submit Order**.
4. Click on the number in the **Requisition Number** field to display the details.
5. Click **Close** when the status says **Completed**.

Note: Repeat the steps above to add a Prime Network Services Controller (if using ANS), Prime Performance Manager (if you are tracking VM performance), AMQP Server, Chef, or Puppet.

Discovering Cloud Infrastructure (Optional)

Discovering Network Devices (Optional)

The purpose of **STEP 4** is to discover your physical and virtual network devices.

Note: This process can take anywhere from 10 minutes up to an hour.

Note: Save for your first Prime NSC, you do not need to pre-provision the virtual devices. Cisco IAC will provision all these devices for you when the first Tenant Organization is onboarded that has elected for Advanced Network Services. If you are not planning on using Advanced Network Services (VSA 1.0), you may skip Step (Tab) 4 and move on to Step (Tab) 5 directly.

Note: You do need to have Nexus1000v Virtual Access Switch installed and integrated with VMware as well as a range of VLANs identified in the data up-link. The range of VLANs you intend to specify in your Network PoD should be passed in the data-uplink trunk from N1kv to the ESXi hosts (its VEMs). Cisco IAC does not configure this for you.

1. To discover network devices, from the Wizard choose Discover Network Devices.
2. You are returned to the wizard Step 4 screen.
3. Click **Next** to proceed to Step 5 in the Wizard.

Registering Nexus 1000v Devices (Optional)

Devices which you have discovered and then register are those devices which you want dynamically created VLANs (by Cisco IAC) to be propagated to. So register a device if you want Cisco IAC to go configure the VLAN on it.

1. To register Nexus 1000v devices, from the Wizard choose Register Nexus 1000v.
2. Complete the online process to register Nexus 1000v devices. When you are done, click **Next**.

Note: Registration gives the device a “friendly name,” defines the Device Role, and identifies the linkage to the PNSC it is currently integrated with.

Managing PODs

On the **STEP 5** panel of the Wizard, you create PODs and choose the instances that manage its resources. A POD (Point-of-Delivery) contains the platform elements and a data center.

Creating Network PODs

Note: This step is optional. However, it is mandatory if you are using Advanced Network Services. The Network POD is also required for OpenStack as well as Advanced Network Services. Cisco IAC 4.2 provides the ability to dynamically provision tenant networks within VDCs.

Use the Register POD service to register an installed POD (Point Of Delivery) and choose the instances that manage its resources, so that you can start using it in the cloud. You must be logged in as a Cloud Provider Technical Administrator to create a network POD in Cisco IAC 4.2.

1. From the Wizard, choose Register Network POD.
2. On the Register Network Pod form, define the platform elements:
 - a. Assign a name for this POD.
 - b. Assign a description for this POD.
 - c. *Optional.* Choose the UCS Manager that is to serve this POD.

Note: Any physical devices acting as Edge Routers or Layer2 Aggregation Switches should also be selected.

Note: The **VLAN Pool** field must have a range of VLANs that Cisco IAC can use to create tenant networks. It is also used in the dynamic creation of Enterprise Transit port-profiles/network when Connection-Type is Enterprise during the process of creating an organization and Load Balancer Networks.

Note: There is a 1-to-1 mapping between UCS Managers and PODs. If the drop-down list is empty, all available UCS Managers have been associated with a POD.

Note: UCS Fabric Inter-connects will also appear in the list for select under the Network POD. The UCS Manager as well as its Fabric Inter-connects should all be selected together.

3. Click **Submit Order**.
4. Click on the number in the **Requisition Number** field to display the details.
5. Click **Close** when the status says **Completed**.

Note: Devices which you have discovered and then register are those devices which you want dynamically created VLANS (by Cisco IAC) to be propagated to. Therefore, register a device if you want Cisco IAC to configure the VLAN on it and choose them when creating the network POD.

Creating Compute PODs

Use the Create POD service to register an installed compute POD (Point Of Delivery) and choose the cloud infrastructure platform elements that manage its resources.

Note: There is a 1-to-1 mapping between datacenters and PODs (one between DataCenter and Compute POD; refer to the object model). If the drop-down list is empty, all available datacenters have been associated with a POD.

Note: Multiple data centers are supported through multiple Compute PODs. Multiple Compute PODs can reference the same network POD.

1. From the Wizard, choose Create Compute POD.
2. On the Create Compute POD form:
 - a. Enter a new short name and a full description for the Compute POD.
 - b. Choose your Cloud Infrastructure Type, such as VMware vCenter Server.
Note: There are other infrastructure types beyond VMware vCenter Server used in this example.
 - c. Choose the Network POD instance that serves in this POD.
 - d. Choose the vCenter Instance.
 - e. Choose the Datacenter.
 - f. Choose UCS Manager.
3. Click **Submit Order**.
4. Click on the number in the **Requisition Number** field to display the details.
5. Click **Close** when the status says **Completed**.

Setting System-Wide Services and Provisioning

On the **STEP 6** panel of the Wizard, you choose the system-wide services to offer and enter critical information for provisioning the cloud servers, such as network domain name and default time zone. When you have completed Step 6, click **Next**.

Setting System-Wide Service Options

When a service is disabled, ALL users, including the CPTA, are disallowed from ordering the given service. Although users can see the link to a disabled service, a “disabled” message displays, and “Submit” buttons are hidden on the service forms.

Note: You can re-enable a disabled service at any time. Disabling an option only affects what users can order from the catalog from the time the Set System Wide Service Options service order is fulfilled. It does not affect current services already ordered.

1. From the Wizard, choose Set System-wide Service Options.
2. Choose the proper options based on your hardware inventory.
3. Disable a service by clicking the **No** radio button, or re-enable a disabled service by clicking the **Yes** radio button.
4. Click **Submit Order**.
5. Click on the number in the **Requisition Number** field to display the details.
6. Click **Close** when the status says **Completed**.

Specifying Provisioning Settings

Specify the settings for bare metal and virtual machine provisioning, then verify that the bare metal and virtual machine provisioning settings are configured correctly.

1. From the Wizard, choose **Set Provisioning Settings**.
2. On the **Server Provisioning Settings** form, specify the following:
 - a. Enter the period of time allowed, specified in minutes, before a virtual machine deployment operation is determined as failed.
 - b. Enter the amount of time, in whole hours, to suppress duplicate alerts related to cloud automation.
 - c. The amount of time, in whole hours, between consecutive periodical executions of the CloudSync infrastructure discovery service.
 - d. The period of time allowed, specified in minutes, before a CloudSync Discovery operation is determined as failed.
 - e. The amount of time, in minutes, between consecutive periodical executions of platform element connection validation services.
 - f. Enter the name of the Windows domain for commissioned Windows servers to join.
 - g. Enter the username and password for the Windows domain user to join the Windows VM to the Windows domain.
 - h. *Linux only.* Choose the default time zone for the Linux server from the drop-down list. For valid time zone values, see the VMware documentation on VMware.com.
 - i. *Windows only.* Choose the default time zone for the Windows server from the drop-down list. For valid time zone values, see the VMware documentation on VMware.com.
3. Click **Submit Order**.
4. Click on the number in the **Requisition Number** field to display the details.
5. Click **Close** when the status says **Completed**.

Setting System Email Account

You assign the “from” address for the default templates to use for outgoing notification email messages. Email cannot be sent without a fully-qualified e-mail address. Follow these steps to assign an email address for the default email templates.

1. Click **Set System Email Account**.
2. **Manage Email Template** window, enter the e-mail address you would like to use as the default from address for outgoing notification email messages in the **Sender email Address** field.
3. Click **Submit Order**.
4. Click the number in the **Requisition Number** field to display the details.
5. Click **Close** when the status says **Completed**.

Creating Resources for Network Services

On the **STEP 7** panel, you register a datastore, add community and user networks to which users can deploy servers, management networks, and infrastructure networks to be used for bare metal provisioning and for creating a Community VDC.

Note: Infrastructure networks are also used for management and service interfaces of Virtual Network Devices.

- When you have completed all of the tasks in Step 7, click **Next**.
- If you do not wish to add networks or create a Community VDC, click **Skip**.

Registering a Datastore

Datastores that are discovered automatically during Connect Cloud Infrastructure must be registered before they can be used in the Community VDC community and organization virtual data centers. A single datastore can be used by one or more Virtual Data Centers.

1. From the Wizard, choose Register Datastore.
2. On the Register Datastore form, choose a datastore to be registered for use.
The form will populate with information specific to the datastore you chose.
3. Enter a friendly name and description (for example, the type of storage) for the datastore. (Optional)
4. Click **Submit Order**.
5. Click on the number in the **Requisition Number** field to display the details.
6. Click **Close** when the status says **Completed**.

Creating a Service Network

Use the Add Network form to define a VLAN and subnet to use in the cloud system use, for user servers, server management, or for use by the cloud infrastructure.

Note: If you have many hosts, when adding networks, be sure to choose the same port group for each host.

1. From the Wizard, choose **Create Service Network**.
2. On the Add Network form, from the drop-down choose a **Cloud Infrastructure Type**. Types include:
 - Amazon EC2
 - Cisco UCS Director
 - Openstack Cloud Manager
 - VMWare vCenter Server
 - VMWare vCloud Director

Note: Depending on the cloud infrastructure type you choose, you will then see a selection of different fields populate the screen.
3. Complete the cloud infrastructure fields as required for each type. For example, you may be asked to provide any of the following (as well as other information):
 - a. **Network Name:** Enter a short name for the network that will be shown to users in drop-down selection lists.
 - b. **Subnet Address Specification:** Enter the network for this subnet in CIDR notation. For example, 192.168.20.0/24. Enter only an IPv4 type of IP address. Note: Only networks from /23 through /29 are supported.

- c. Community Network:** Choose the network access scope for user networks. A community network is available to users in Community VDCs. Non-community networks require explicit VDC level access to be set before users can deploy servers to it, which is useful for traffic isolation and better security.
- d. Public Network:** Specify the duplication policy for this network. Public networks are globally unique, while private networks must only be unique within associated network device contexts.
- e. Network Type:** Choose a network type to determine how this network can be used. User networks are used for deploying virtual machines or physical servers. Management networks are used for management access to cloud servers. Infrastructure networks are used for management interfaces of hypervisor hosts and other infrastructure devices. For Advanced Network Services, use “Infrastructure” type for Service, Infrastructure, and Internet Transit. (These are the three networks you are asked for when you create a Service Resource Container).
- f. Network Source:** Choose how IP addresses management is done in this network. Cisco Prime IPAM, DHCP, Internal, External. Internal is managed by Cisco IAC.
- g. Additional:** In addition, you may need to enter any of the following:
 - Subnet Mask
 - Gateway Address
 - FHRP1 (First Hop Redundancy Protocol) and FHRP2 Address
 - Broadcast Address
 - Primary DNS and Secondary DNS

Note: Depending on the cloud infrastructure type you chosen, the form may populate with infrastructure-specific fields which also may be required. Be sure to complete these fields as well. In all cases, the red asterisk will indicate the required field or fields.

4. Click **Submit Order**.
5. Click on the number in the **Requisition Number** field to display the details.
6. Click **Close** when the status says **Completed**.

Creating Infrastructure Networks

From the Wizard, choose **Create Infrastructure Network**.

Note: The steps for this procedure are the same as outlined in the [Creating a Service Network, page 63](#).

Creating an Internet Transit Network (Optional)

This is for use in Advanced Network Services to provide Internet Transit Network Connectivity to Organizations. Connectivity from Tenant Org CSRs to the Datacenter/Provider Edge ASRs.

From the Wizard, choose **Create Internet Network**.

Note: The steps for this procedure are the same as outlined in the [Creating a Service Network, page 63](#).

Creating the Service Resource Container (Optional)

This is where the Compute POD is associated with the Infrastructure, Service and Internet Transit Networks. In addition, this is also where the target Cluster and Datastore to be used within the Datacenter (identified by the Compute POD) is selected. One place the Service Resource Container is used is during Creation of Organizations to specify the Network an Compute resources to be used by that Organization.

Completing the Setup

Note: The Service Resource Container is *required* for ANS and OpenStack.

Note: The steps for this procedure are the same as outlined in the [Creating a Service Network, page 63](#).

Configuring Resources for Network Services (Optional)

From the Wizard, choose Configure Resource for Network Services.

Note: The steps for this procedure are the same as outlined in the [Creating a Service Network, page 63](#), but for Advanced Configuration Management (ACM), you also choose:

- Puppet or Chef, and then,
- Select the Puppet or Chef name.

Adding a Public Subnet to Network POD (Optional)

Note: This is the subnet IPs for Advanced Network Services UnProtected Public Tenant Network and VMs, Floating IPs (Static NAT), and Public VIPs.

1. From the Wizard, choose Add Public Subnet to Network POD.
2. On the Add Public Subnet to Network POD form, enter the following:
 - a. **Subnet Address.** The network address of the subnet.
 - b. **Subnet Bitmask.** The bitmask (numeric) of the subnet you are adding. Do not include the slash.
 - c. **Network POD Name.**
 - d. **Assigned Subnets.** The public subnets that have already been assigned.
 - e. **Unassigned Subnets.** The free public subnets remaining in the pool.
3. Click **Submit Order**.
4. Click on the number in the **Requisition Number** field to display the details.
5. Click **Close** when the status says **Completed**.

Completing the Setup

After setup complete, go to tenant management and add tenants and organizations. Once that is done, your cloud environment is ready for ordering. The final phase, is to set or check certain permissions as follows.

Note: For more information on Organizations, Templates, Users, and so on, see the [Cisco Intelligent Automation for Cloud 4.2 Administrator Guide](#).

Note: Review the use of multi-domains at this time, as well (new in Cisco IAC 4.2). See the [Cisco Intelligent Automation for Cloud 4.2 Administrator Guide](#), in [Setting Multiple Domains, page 58](#).

1. Access the Organization Designer.
2. Update all CPTA and TTA Roles.
 - a. Execute all services:
 - **Service Order Service > All**

Completing the Setup

b. Access all service items:

- **Service Item Instance data:** Choose **Read all**

3. Update all OTA, TTA, and Server Owner Roles.

a. **Service Item Instance data:** Choose **Read all service items** from my BU WebServices

b. Add:

- nsAPI access
- Requisition Access
- Requisition System Account

Note: For more information on Organizations, Templates, Users, and so on, see the [Cisco Intelligent Automation for Cloud 4.2 Administrator Guide](#).



Upgrading From Previous Cisco IAC Versions, 4.x, 4.x.x to 4.2

Important Information About Upgrading

- We do not support direct upgrades from Cisco IAC versions earlier than 4.0; for example upgrading from Cisco IAC 3.1 to Cisco IAC 4.2. We support only incremental upgrades within the same major release (4.0 to 4.1.1, for example).
- Upgrading may cause certain custom content changes in Cisco Prime Service Catalog to be overwritten. We recommend that you run the upgrade process first in a test environment.
- See the *Cisco Intelligent Automation for Cloud 4.2 Compatibility Matrix* for the exact versions of the Cisco (and third-party) software compatible with Cisco IAC 4.2.
- Refer to [Post-Upgrade Tasks, page 72](#) for information on additional post-upgrade tasks you will need to attend to after successfully upgrading to Cisco IAC 4.2.

Note: After the upgrade process has finished, be sure to notify all Cisco IAC users to refresh their browser cache. They will continue to see the previous version of Cisco IAC until they do so.

See the latest *Cisco Prime Service Catalog Installation Guide* for more information:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/prime-service-catalog/products-installation-guides-list.html>

Note: Be sure to create a backup of both the Cisco Process Orchestrator database and the Cisco Prime Service Catalog Request Center database before you upgrade to Cisco IAC 4.2.

Upgrading Cisco Prime Service Catalog and Installing the REX Adapter

If you are upgrading to Cisco Intelligent Automation for Cloud 4.2 from any version of Cisco IAC 4.x version prior to Cisco IAC 4.1.1, you will need to upgrade Prime Service Catalog to version 11.0 and install the REX adapter.

Upgrading Cisco Prime Service Catalog

Important: Be sure to have a snapshot of your Prime Service Catalog environment and backups of Cisco Prime Service Catalog database and files before upgrading.

Installing (or Reinstalling) the REX Adapter

1. Copy `Prime Service Catalog/IACAdapters-[release].zip` from the Cisco IAC 4.2 download into a temporary directory on the Prime Service Catalog server.
2. Extract `IACAdapters-[release].zip` to a temporary location on the Prime Service Catalog server (hereafter referred to as [rex]).
3. Copy: `\IACAdapters-[release]\deploy\RexAdapter.xml` to a new directory called, `c:\rex\deploy` (or for Linux, `/rex/deploy`).

Upgrading Cisco Prime Service Catalog and Installing the REX Adapter

4. Copy `\IACAdapters-[releas]\adapters\adapter_REXAdapter.jar` to `CiscoPrimeServiceCatalog\jboss-as-7.1.1.Final\ServiceLinkServer\deployments\ServiceLink.war\WEB-INF\lib`.
5. Start Prime Service Catalog and make sure you can login.
6. Extract ADK and install the REX adapter.
 - a. Stop Prime Service Catalog.
 - b. Extract the `adk.zip` from the Prime Service Catalog installer to `c:\adk`.
 - c. Take `kek_new.txt` and `kek_old.txt` from `c:\CiscoPrimeServiceCatalog\Dist` folder to `c:\adk`.
 - d. Install the REX adapter:
 - Open a command window, and `cd` to the `c:\adk` folder.
 - Set `JAVA_HOME` to the 1.7 jdk.
 - Run `adapter_dbinstaller.cmd` (Windows) or `adapter_dbinstaller.sh` (Linux)

■ The following is a sample run for MS SQL Server:

```
c:\adk>adapter_dbinstaller.cmd
Please enter the database connection information.
Database Type [SQLSERVER]:
Database Hostname [localhost]:
Database Port [1433]:
Database Name [ServiceCatalog]:
Username [RCUSER]: CPSCUser
Password:
Testing database connection: Success!
Adapter Deployment Descriptor File: c:\rex\deploy\REXAdppter.xml
```

■ The following is a sample run for Oracle/Linux:

```
adapter_dbinstaller.sh
Please enter the database connection information.
Database Type [SQLSERVER]: Oracle
Database Hostname [localhost]:
Database Port [1521]:
Database Name [ServiceCatalog]:
Username [CPSCUSER]: CPSCUser
Password:
Testing database connection: Success!
Adapter Deployment Descriptor File: c/rex/deploy/REXAdppter.xml.
Install REX
```

7. Delete all of the contents in the following folders in the Service Catalog Server.

Note: Do not delete the *actual folders*, only the *contents* within them.

```
CPSC_Install_Dir\jboss-as-7.1.1.Final\RequestCenterServer\tmp\work\*
CPSC_Install_Dir\jboss-as-7.1.1.Final\RequestCenterServer\tmp\vfs\*
CPSC_Install_Dir\jboss-as-7.1.1.Final\ServiceLinkServer\tmp\work\*
CPSC_Install_Dir\jboss-as-7.1.1.Final\ServiceLinkServer\tmp\vfs\*
```

8. Start Prime Service Catalog again.

Upgrading Process Orchestrator

You need to upgrade Cisco Process Orchestrator to PO 3.1.1. For full instructions, refer to the most recent Cisco Process Orchestrator documentation, which can be found here:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/process-orchestrator/tsd-products-support-series-home.html>.

Updating Agents

Note: You need to upgrade agents only when upgrading *manually*. For *new* installations of Cisco Intelligent Automation for Cloud 4.2, this task is handled using **Setup > Configuration Wizard** (Day 0).

1. Log into Prime Service Catalog as site administrator and stop all agents.
2. Choose **Service Link > Choose Control Agents**.
3. Choose the agent called “REX Set REX Agent Properties.”
4. Choose **Outbound Properties**.
5. Update the REX username and password.
 - a. Start the agent called “REX Set REX Agent Properties.”
 - b. Open a new browser, log into the service catalog, and go to Service Portal > Setup > System Settings.
 - c. Click Set REX Agent Configuration, enter the username and password for the REX user.
 - d. Click **Submit Order**.
6. Go to the other browser tab to monitor the status of the Set REX Agent Configuration task launched in the previous step.
 - a. Choose Service Link from the drop-down menu.
 - b. Click on the View Transactions tab in the menu bar.
 - c. Click on the External Tasks tab in the main window.
 - d. Wait for the Set REX Agent Configuration task to complete.
 - e. Choose Control Agents and start All REX agents.
7. Go back to Service Portal > Setup > System Settings.
 - a. Choose **Set Agent Configuration**.
 - b. Submit a configuration order for each Agent Type in the drop-down menu (HTTP, NSAPI, DB).

Note: It is best to wait for the previous one to finish before submitting the next one.

Note: See the help text for instructions and examples. Be sure there are no spaces at the beginning or end of the copied help text. Unexpected errors may occur as a result of these spaces. This applies only to DB agent configuration.
8. Go to the other browser tab to monitor the status the NSAPI, HTTP and DB agent configuration tasks launched in the previous step.
 - a. Choose Service Link from the drop-down menu.

Upgrading and Sub-Interface Support

- b. Click on the View Transactions tab and wait for all Set Agent Configuration task to complete. Here are two examples (for DB agent Configuration for JDBC Url):

- MS SQL:

```
example:jdbc:sqlserver://localhost:1433;DatabaseName=RequestCenter;selectMethod=direct;sendStringParametersAsUnicode=true
```

- Oracle:

```
jdbc:oracle:thin:@localhost:1521:orcl
```

9. Start all agents.

Upgrading and Sub-Interface Support

Sub-Interface feature continues to be supported with the upgrade of the CSR and PNSC. Sub-Interface support on CSR in Cisco IAC 4.2 release requires the latest versions of CSR and PNSC. For the complete list of interoperable components and version/release information, see the [Cisco Intelligent Automation for Cloud 4.2 Compatibility & Requirements Matrix](#).

Deploying or Upgrading PNSC

You need to deploy or upgrade Install Cisco Prime Network Services Controller (PNSC) to the latest version (3.4.x).

Note: For the complete list of interoperable components and version/release information, see the *Cisco Intelligent Automation for Cloud 4.2 Compatibility & Requirements Matrix* located here:

<http://www.cisco.com/c/en/us/support/cloud-systems-management/intelligent-automation-cloud/tsd-products-support-series-home.html>.

Deploying the IAC Management Appliance for CSR

You need to deploy the Cisco IAC Management Appliance to update to the latest compatible version of Cloud Services Router (CSR) and to the latest version of Virtual Security Gateway (VSG).

Importing and Deploying Portal Packages

Cisco IAC ships with packaged image files and portal pages to provide an easy-to-use portal for ordering services. Before you begin deploying packages, you need to first need to delete certain billing rate data.

Deleting Billing Rate Data

1. Launch your browser.
2. Log in to Cisco IAC 4.2 as CPTA.
3. Navigate to **Management > Price Rates > Master Rate Group**.
4. Choose the **PSDeActivate** Table.
5. Choose the **Billing Rate Table Tab**.
6. Select **Rate Code**.
7. Click **Delete**.
8. Choose the **Billing Rate Definition Tab**.
9. Click **Delete**.

Importing IAC Packages on PSC Windows Environments

Importing the IAC packages on Prime Service Catalog Windows environments with IIS requires the following IIS settings changes. IIS 7.5 has a default limit of 30 MB for all upload file. You can change this limit by performing the following steps:

1. Open Server Manager window.
2. In the first (left-most) panel, expand **Server Manager - Roles - Web Server (IIS) - Internet Information Services (IIS) Manager**.
3. In the second (middle) panel, expand **hostname - Sites - Default Web Site**.
4. Click **Default Web Site**.
5. In the third (middle) panel, click **Request Filtering**.
6. In the fourth (right-most) panel, click the link **Edit Feature Settings...**
7. On the **Edit Request Filtering Settings** popup dialog, change the value for **Maximum allowed content length (Bytes)** from 30,000,000 to a larger number, such as 60,000,000.
8. Click **OK**.
9. Restart **World Wide Web Publishing Service**.

Copying the Cisco IAC Portlets Package and Extracting Files

1. On the Cisco Process Orchestrator server, navigate to the following folder where `IAC-ServiceCatalog-4.2_xxxx.xxx` was extracted. You will see names along the lines of "CS_Services_4-2.xml."
Note: The file is in a compressed (ZIP) file and will need to be extracted. There is also a ZIP file with the Prime Service Catalog files in it.
2. Extract `IACPortlets-4.2_xxxx.xxx` from the compressed (ZIP) file to a temporary location. It will create an `IACPortlets-4.2_xxxx.xxx` folder.
3. Stop the JBoss application server by stopping:
 - a. Cisco Prime Service Link, and then
 - b. Cisco Prime Service Catalog**Note:** For instructions, see "How to Stop/Start the JBoss Server" in the *Cisco Prime Service Catalog 10.x Installation Guide*. The latest version can be found here:
<http://www.cisco.com/c/en/us/support/cloud-systems-management/prime-service-catalog-10-0/model.html#InstallandUpgradeGuides>
4. In the `IACPortlets-4.2_xxxx.xxx` folder, locate `RequestCenter_war.zip`.
5. Extract `RequestCenter_war.zip` to the following directory (for Windows):
`(JBOSS_DIR)\ServiceCatalogServer\deployments\RequestCenter_war`
Note: Overwrite any existing files, if prompted.
6. Restart the JBoss application server by starting again: Cisco Prime Service Link, and Cisco Prime Service Catalog.

Importing and Deploying Portal Pages


Deploy the Cisco IAC portal page content by importing it from the *PortalPages.xml* portal page file, located in the IACPortlets folder.

1. Choose **Portal Designer** from the module drop-down list to open Portal Designer.
2. In Portal Designer, click the **Portal Pages** tab.
3. In the left navigation pane, click **Actions** and choose **Import** from the drop-down list.
4. On the Import Portal Pages dialog box, click the **Overwrite** radio button in the Conflict Resolution field.
5. In the Import from File field, click **Choose File** to navigate to the IACPortlets folder that you extracted earlier.
 - a. On the Choose File to Upload dialog box, choose the **PortalPages.xml** file and click **Open**.
 - b. On the Import Portal Pages dialog box, click **Import**.
6. Refresh your browser to view the imported portal.

Post-Upgrade Tasks

Importing US English Localization File

As one of the post-upgrade tasks, you will need to import the US English Localization csv file.

1. Find the `IACPortlets-4.2.xxx.zip` file.
2. Extract the US English Localization .csv file.
3. Start Cisco Prime Service Catalog.
 - a. Login as admin.
4. Go to **Localization > Javascript Strings**.
5. Go to **Bulk Actions > Import** to import the localization .csv file you just extracted.
6. Select the **Publish** drop down and choose the US English radio button.
7. Click **Apply**.
8. Log in to Cisco IAC 4.2.
 - a. Login as CPTA.
 - b. Go to the **Home** page.
9. Select **User Management**.
10. Click on the **gear** icon  and select **Edit User Profile**.
11. Ensure all user roles have US English selected in the Profile.
12. Return to the Cisco IAC Home page.

Note: For more information on managing users, see the *Cisco Intelligent Automation for Cloud 4.2 Administrators Guide*.

Changing Localization Settings

All Prime Service Catalog content (such as headers, service item names, cloud platform elements names, and so on) will be displayed in English unless you import and add translation for content items through Content Strings localization tool.

For example, in order to translate the Home Page header, you would do this:

1. Start Cisco Prime Service Catalog.
2. Login as admin.
3. Select **Localization**.
4. Select the **Content Strings** tab.
5. Select **Portal** from the **Entity** dropdown.
6. From the **Groups** dropdown, select **My Cloud**.
7. From the **Portal Pages** dropdown, select **Home Page**.
8. In the respective language columns, add your translation string of the content to be translated.
9. Click **Save**.
10. Return to the home page to view your changes.

Adding Permissions

The following permission needs to be added to roles OTA, TTA and VSO using the Organization Designer after upgrade: “Read all Instance Data and Service Item Instance Data-OpenStack Projects.” Also, you will need to add/update portal and portlet permissions. In addition, you need to add the following permission for the VSO role: “Needs Order Service - Service-vApp Run Rate.”

Deploying New Cisco IAC 4.2 Management Appliance

After successfully upgrading to Cisco IAC 4.2, you will need to deploy the new Cisco IAC Management appliance. This appliance includes new components such as:

- Prime Performance Manager (PPM)
- Assurance Control
- RabbitMQ
- ACM repository

Note: After deploying appliance, update, update the Cisco IAC 4.2 management appliance platform element using **System Settings > Connections**.

Setting System-Wide Service Options

Set your system-wide service options after you upgrade using the Set System-wide Service Options form using **Setup > System Settings > System Settings** tab.

Application Configuration Management Support

To use an existing tenant created in an earlier version of Cisco IAC, your CPBA or CPTA will need to create the “ACMTemplate Rate” table manually.

Note: For instructions on creating the “ACMTemplate Rate” table manually, see the Cisco Intelligent Automation for Cloud Knowledge Base.

Refreshing the Browser Cache

After the upgrade process has finished, be sure to notify all Cisco IAC users to refresh their browser cache. They will continue to see the old version of Cisco IAC until they do so.



Upgrading Cisco PPM to the Full License

The trial/demo edition of Prime Performance Manager (PPM) ships with Cisco IAC 4.2 Management Appliance. In order to leverage the benefits of the Full (licensed edition) of PPM, you will need to uninstall the demo version and then install the licensed version. How to do so (with an option to save your data, if required) is explained in this section. You must be logged in as a Cloud Provider Technical Administrator (CPTA) to complete this task.

Note: Your organization will first need to purchase the full license for Prime Performance Manager 1.5.1. For more information, see your Cisco Sales Representative.

Hardware Requirements for the Trial/Demo Version of PPM

The maximum number of network elements that can be managed by the small demo / proof of concept hardware is shown in detail below.

Table 1 Network Size (Maximum)

Number of Devices	200
Number of PWE3 Links	12,400
Number of Interfaces	37,600
Number of Interfaces with Stats	20,900

Table 2 Recommended Hardware Configurations

CPU	CPU Type	non-NEBs Compliant Systems	NEBs Compliant Systems
Cisco UCS C22M3	4-core (UCS C22M3)	Xeon E5-2407v2 2.4 GHz	
	4-core (UCS C22M3)	Xeon E5-2407 2.2 GHz	
Cisco UCS C220M3	4-core (UCS C220M3)	Xeon E5-2609v2 2.5 GHz	
	4-core (UCS C220M3)	Xeon E5-2609 2.4 GHz	
Cisco UCS C200M2	4-core (UCS C200M2)	Xeon E5620 2.4 GHz	
Cisco UCS B200M3	4-core (UCS B200M3)	Xeon E5-2609v2 2.5 GHz	
Oracle Netra X3-2 or equivalent	8-core (Oracle X3-2)		Xeon E5-2658 2.1 GHz

Table 3 Recommended Storage

#	Size and Type	Purpose
1	146GB SAS 15K RPM Drive	OS and PPM
1	300GB SAS 15K RPM Drive	Backups

Table 4 Storage and Performance Requirements

Type	System	Notes
Linux OS PPM Gateway / Unit Installation	80 GB Used 120 IOPS with about 75% write operations	Driven by: devicecache/logs/database/exported reports Writes: devicecache/ logs/ database /exported Reports can be relocated if necessary
First External Partition PPM Gateway / Unit Backups	150 GB Used 250 IOPS with about 45% write operations	Sustained IOPS During Backup Periods Quiet At Other Times

Table 5 Virtual HW and Memory Requirements

Virtual Hardware Requirements For Vm Environments	Memory And Swap Requirements	Java Virtual Machine Memory Configuration
vCPU Number: 4 or more For VM Environments	RAM Size: 8 GB or greater Swap Space: 8 GB or greater	Gateway JVM Size: 2 GB Unit JVM Size: 4 GB

Upgrading and Saving Previous Data

If you need to preserve the data created during the evaluation (demo) period after upgrading to the Full version of Prime Performance Manager, follow the steps below:

1. Download PPM 1.5 FCS version and the 1.5.1 update from cisco.com.
2. Perform a PPM backup of the PPM 1.5.1 evaluation system by executing the following command:

```
/opt/CSCOppm-gw/bin/ppm backup
```

3. Validate that the backup file(s) were created.

Note: The default location of the files is /opt.

Examples of files created:

```
ppm15-Unit-hostname.tar
ppm15-Gateway-hostname-backup.tar
```

4. Uninstall Prime Performance Manager 1.5.1 evaluation.

– To uninstall a previous build without any questions:

```
/opt/CSCOppm-gw/bin/ppm uninstall -n
```

5. Install 1.5.

Hardware Requirements for the Trial/Demo Version of PPM

- To perform an installation from the directory that contains the PPM installation files:

```
./setup.sh
```

6. After the Gateway and Unit are installed, exit the installation.

Note: Do *not* yet start the system.

7. Install upgrade to 1.5.1.

- To perform an installation from the directory that contains the PPM installation files:

```
./setup.sh
```

8. Start the Gateway and Unit after the installation is complete.

9. Validate the system has been updated and the version is 1.5.1:

```
/opt/CSCOppm-gw/bin/ppm version
```

10. Enable SSL and user access after the installation has completed:

```
/opt/CSCOppm-gw/bin/ppm ssl enable
```

11. Enable user access after SSL has been installed:

- a. Execute `/opt/CSCOppm-gw/bin/ppm useraccess enable`

- b. You will be prompted for additional information, as shown:

- c. Choose the type of authentication to use: [local] **linux**

- d. Enter username: **cisco**

- e. Enter First Name: **Cisco**

- f. Enter Last Name: **Administrator**

- g. Enter access level for user cisco: **5**

12. Perform Prime Performance Manager restore:

```
/opt/CSCOppm-gw/bin/ppm restore both
```

13. After the restore completes for the Gateway and Unit start the system

```
/opt/CSCOppm-gw/bin/ppm start
```

Upgrading Without the Need to Save Data

If you do not need to save your data created with the trial/demo version during the evaluation period, follow the steps below to upgrade to the fully licensed version of Prime Performance Manager.

1. Download Prime Performance Manager (PPM) 1.5 FCS version and the 1.5.1 update from Cisco.com.

Caution: Backup `/opt/CSCOppm-gw/etc/amqpConfig.xml` **before starting. After upgrading, restore the file to the upgraded instance.**

2. Uninstall Prime Performance Manager 1.5.1 evaluation version.

Hardware Requirements for the Trial/Demo Version of PPM

- To uninstall a previous build without any questions, execute this command:

```
/opt/CSCOppm-gw/bin/ppm uninstall -n
```

3. Install Prime Performance Manager 1.5 FCS version. To perform an installation from the directory that contains the PPM installation files, do this:

```
./setup.sh
```

- Install PPM 1.5.1 update.

- To perform an installation from the directory that contains the PPM installation files, type this:

```
./setup.sh
```

4. Start the Gateway and Unit after the installation is complete.

5. Validate the system has been updated and the version is 1.5.1:

```
/opt/CSCOppm-gw/bin/ppm version
```

6. Enable SSL and user access after the installation has completed:

```
/opt/CSCOppm-gw/bin/ppm ssl enable
```

7. Enable user access after SSL has been installed:

- a. Execute `/opt/CSCOppm-gw/bin/ppm useraccess enable`

- b. You will be prompted for additional information, as shown:

- c. Choose the type of authentication to use: [local] **linux**

- d. Enter username: **cisco**

- e. Enter First Name : **Cisco**

- f. Enter Last Name : **Administrator**

- g. Enter access level for user cisco: **5**

8. After the restore completes for the Gateway and Unit start the system

```
/opt/CSCOppm-gw/bin/ppm start
```




Solution Prerequisites Checklists

Default Ports and Protocols

Table 1 Requirements–Default Ports and Protocols

Application	Default Port	Protocol	Description	✓
Cisco Prime Service Catalog	8080	TCP	Client web browser connections to the Cisco Prime Service Catalog ServiceCatalog; Process Orchestrator communications to the Cisco Prime Service Catalog request center inbound web service	
	6080	TCP	Process Orchestrator communications to the Cisco Prime Service Catalog service link inbound web service.	
Process Orchestrator	2081	TCP	User Web browser connections to the Process Orchestrator web console	
	61525	TCP	Process Orchestrator Console access to the Process Orchestrator Server	
	61526	TCP	Web Service (API) communication using HTTPS protocol from the Cisco Prime Service Catalog to the Process Orchestrator web service	
	61527	TCP	Web Service (API) communication using HTTP protocol from the Cisco Prime Service Catalog to the Process Orchestrator web service	

Limitations and Scalability

Table 2 Limitations and Scalability

Entity	Limitations	✓
Cisco UCS Manager	1 instance per delivery (POD). Each POD can contain up to 160 blades/host.	
Cisco Process Orchestrator server	1 Process Orchestrator environment supported by Cisco IAC. Note that multiple servers may be installed in that Process Orchestrator environment	
Registered users	Up to 1,000; up to 200 concurrent users	
Service items (concurrent)	Up to 10,000	
VMware vCenter	1 instance	

Storage Management Requirements

Table D-3 Requirements—Storage Management

Requirement	✓
Create storage and configure as datastores	

Cisco UCS Manager and Bare Metal Operating System Provisioning Requirements

Table 4 Requirement—Installing and Configuring UCS Manager

Requirement	✓
UCS Manager is installed and configured before installing Cisco IAC	

Table 5 Requirements—Creating UCS Manager Pools

Requirement	✓
UUID suffix pool	
MAC address pool	
WWNN pool	
WWPN pool	

Table 6 Requirements—Creating Cisco UCS Manager Service Profile Templates and Policies

Requirement	✓
A hypervisor service profile template, per cluster, with the same quantity and configuration of vNICs as on other hosts in the same cluster. The native VLAN for the first vNIC should be set to the Management VLAN for that vCenter. Note: Required only if ESXi Provisioning is enabled.	
At least one service profile template for physical server provisioning. Note: Required only if Physical Server Ordering is enabled.	
A local boot policy assigned to the physical server service profile template which is set to boot from local disk	
A boot policy named "PXEBoot" which is configured to boot from the network Note: This name is mandatory	
UCS blades for provisioning VMware ESXi hypervisor hosts have at least one local drive	

VMware Software Requirements

Table 7 Requirements–VMware Software Installation

Requirement	
vCenter object names do not contain forward slashes	✓
vSphere PowersCLI 5 or later is installed on the Process Orchestrator server	
VMware Enterprise licensing is applied	
VMware vSphere Distributed Resource Scheduler (DRS) is enabled	
VM templates have been created with VMware tools installed to support operating system customizations	

Directory and Mail Server Requirements

Table 8 Requirements–Directory and Mail Server

Requirement	
LDAP server is installed, configured, and deployed	✓
SMTP server is installed and configured with an account to send and receive e-mails	

Organizations and Users Preparation

Table 9 Requirements–Organizations and Users

Requirement	
Prepare a list of organizations	✓
Prepare a list of organization users	
Prepare a list of Organization Technical Administrators	

Create a Virtual Datacenter

Table 10 Requirements–Virtual Datacenter Creation

Requirement	
vCenter platform element is registered	✓
POD is created	
Register Datastores	
Create networks	

Create a Community VDC

Table 11 Requirements–Community VDC Creation

Requirement	
vCenter platform element is registered	✓
POD is created	
Register Datastores	
Create networks	

Order VM From Template

Table 12 Requirements–Order VM from Template

Requirement	
VM templates created and discovered	✓
Virtual Data Center or Community VDC is created	
Register Virtual Machine templates	

Order a VM and Install an Operating System

Table 13 Requirements–Order a VM and Install an Operating System

Requirement	
Virtual Data Center or Community VDC created	✓

Provision ESXi

Table 14 Requirements–Provision ESXi

Requirement	
At least one hypervisor UCS service profile template for each vCenter cluster is created	✓
Infrastructure Network is created	
Place blades in the Virtual Blade Pool	
Discover and register Cisco UCS service profile templates	



Solution Deployment Checklists

Cloud Infrastructure Setup Checklist

Task	
Define the VMware vCenter Server platform element	✓
Define the Cisco UCS Manager platform element	
Set provisioning settings	
Add infrastructure network	
Add community network	
Create one or more PODs	
Set up the Community VDC	

Cisco Process Orchestrator Setup Checklist

Task	
Import the Core Automation Pack	✓
Import the Common Activities Automation Pack	
Import the Intelligent Automation for Compute Automation Pack	
Import the Intelligent Automation for Cloud Starter Automation Pack	
Import the Intelligent Automation for Cloud Automation Pack	

REX Adapter Installation Checklist

Task	
Install the REX Adapter	✓

Directory Integration Setup Checklist (If Applicable)

Note: These tasks are required **only** if external authentication is enabled for your environment. Otherwise, skip to the next checklist.

Service Catalog Deployment Checklist

Task	✓
Verify that the prerequisites for directory integration are met	
Configure the LDAP server	
Configure authentication:	
■ Configure mappings	
■ Configure events	
Configure authorization (Optional):	
■ Create a security group for each user role on the LDAP server:	
– Cloud Provider Technical Administrator	
– Organization Technical Administrator	
– Virtual Server Owner	
– Field Extender	
– Service Group	
■ Add the nsAPI user to the Cloud Administration Group	
■ Configure user role mappings	
Enable directory integration	

Service Catalog Deployment Checklist

Task	✓
Copy service catalog files to Cisco Prime Service Catalog server	
Import and deploy service catalogs	

Portal and Portlet Deployment Checklist

Task	✓
Copy portlets folder and extract files	
Configure Cisco Prime Service Catalog stylesheets	
Import and deploy portal pages	
Add portlet access to My Workspace	

Cloud Administration Setup Checklist

Task	✓
Configure and enable approvals	
Set up REX and nsAPI user account	
Set username and password for REX Set REX agent properties	
Start REX Set REX Agent Property agent	
Set REX Agent Configuration and verify that the agent properties are set correctly	
Start REX Set HTTP Agent Property agent	

Directory Integration Setup Checklist (If Applicable)

Task	✓
Set HTTP Agent Configuration and verify that the agent properties are set correctly	
Start all other agents	
Assign e-mail addresses for queue notifications	
Modify the default e-mail notification templates (see Table C-1e-mail Notification Templates Checklist, page 88 for a checklist of all of the templates)	
Create the Cloud Provider Technical Administrator home organization	
Add the new user as a Cloud Administrator (no directory service)	

Directory Integration Setup Checklist (If Applicable)

Note: These tasks are required **only** if external authentication is enabled for your environment. Otherwise, skip to the next checklist.

Task	✓
Set up directory structure on the LDAP server, with Groups and Users folders.	
Create the nsAPI user account on the LDAP server.	
Create the lookup user account with “Read MemberOf” lookup permissions.	
Configure the LDAP server in Cisco Prime Service Catalog.	
Configure authentication:	
■ Configure mappings.	
■ Configure events.	
Configure authorization (<i>Optional</i>):	
■ Create security groups for all six Cisco Prime Service Catalog user roles in each “Groups” folder on the LDAP server.	
■ Add the nsAPI user to the CPTA security group.	
■ Configure user role mappings.	
Enable directory integration.	

Cisco Intelligent Automation for Cloud Prerequisites

Task	✓
You have completed the checklists in Solution Prerequisites Checklists, page 79 and have confirmed that all of the Cisco IAC prerequisites are met.	

Email Notification Template Modification Checklist

Table C-1 e-mail Notification Templates Checklist

Email Template	✓
Add Role Completion Notification	
Ad-Hoc Task Started	
Connection Cloud Platform Elements Completed e-mail	
CPO Error Notification Physical Server	
CPO Error Notification VM	
Default Late Activity	
Failure to Create Network	
Failure to Create Target Notification	
Lease Expiration - First Warning	
Lease Expiration - Second Warning	
My Services Departmental Reviews	
My Services Financial and Departmental Authorizations	
My Services Service Group Reviews	
Notification System Error in Service Request	
Order VM from Template Completion Notification	
Process Escalation	
Remove Role Completion Notification	
Service Canceled Notification	
Service Complete Notification	
Service Confirmation Customer Acknowledgement	
Service Link Error on External Task	
Service Rejected Notification	
Service Started e-mail	
Task Fulfillment Escalation Notification	
Task Fulfillment Pending Notification	
Tenant Management Complete Notification	

Organizations and Users Setup Checklist

Table C-2 **Organizations and Users Setup Checklist**

Task	
Create an organization	✓
Create a new user to add as an Organization Technical Administrator	
Assign Additional Permissions for the Organization Technical Administrator Role	
Assign Additional Permissions for the Server Owner Roles	
Add a Server Owner	

Organizations and Users Setup Checklist



Solution Deployment Worksheets for Cisco Intelligent Automation for Cloud

Hardware Specifications

Table 1 Hardware Specifications for Platform Elements

Platform Element	Component	Client	Server
Process Orchestrator Server	CPU		
	Memory		
	Disk space		
Cisco Prime Service Catalog	CPU	–	
	Memory	–	
	Disk space	–	
Prime Service CatalogDatabase	CPU	–	
	Memory	–	
	Disk space	–	
UCS	CPU	–	
	Memory	–	
	Blades	–	

Database Connection Settings

Table 2 Minimum Software Requirements

Component	Server	Version
Application Server Operating System	Process Orchestrator	
	Prime Service Catalog	
Application Server Framework	Process Orchestrator	
	Prime Service Catalog	
Application Software	Process Orchestrator	
	Prime Service Catalog	
LDAP Server	Process Orchestrator	
	Prime Service Catalog	
	Note: LDAP server requirements apply only if your environment has been enabled for external authentication.	
Web server	Process Orchestrator	
	Prime Service Catalog	
Database	Process Orchestrator	
	Prime Service Catalog	
Web browser	Process Orchestrator	
	Prime Service Catalog	
Virtualization	Hypervisor	
	Hypervisor Manager	
Physical Server Provisioning	Cisco UCS Manager	

Table 3 Database Connection Settings

Component	Server	Version
Database Specifications	Type (Oracle or Microsoft SQL)	
	Version	
	Host	
	Port	
Process Orchestrator credentials	Database or Windows authentication?	
	Username	
	Password	
	Domain	
ServiceCatalog credentials	Database or Windows authentication?	
	Username	
	Password	
	Domain	

Table 3 Database Connection Settings

Component	Server	Version
Datamart credentials	Database or Windows authentication?	
	Username	
	Password	
	Domain	
Cisco Prime Service Catalog credentials	Database or Windows authentication?	
	Username	
	Password	
	Domain	

Process Orchestrator Web Service Target Settings

Process Orchestrator web service settings are configured when the Cisco Intelligent Automation for Cloud Compute Automation Pack is imported into Process Orchestrator.

Table 4 Process Orchestrator Default Web Service Target Settings

Requirement	Setting
HTTP Port of the Process Orchestrator web service target	
HTTPS or HTTP authentication mechanism (NTLM, Digest, or Basic)	
Web service target credentials:	
<ul style="list-style-type: none"> ■ Domain of user account that is used to connect to the Process Orchestrator Web service target 	
<ul style="list-style-type: none"> ■ User account username 	
<ul style="list-style-type: none"> ■ User account password 	

Process Orchestrator-Prime Service Catalog Integration API Connection User Account Credentials

The user credentials for the Prime Service Catalog Integration API Connection to Process Orchestrator are created when the Intelligent Automation for Cloud Starter Automation Pack is imported into Process Orchestrator. This user account is referred to as the *nsAPI user account*.

Table 5 Process Orchestrator-Prime Service Catalog Integration API Connection User Account Credentials

Requirement	Setting
Username	
Password	

Cisco Prime Service Catalog Request Center and Service Link User Account Credentials

Table 6 Cisco Prime Service Catalog Request Center and Service Link User Account Credentials

Requirement	Setting
Username	
Password	

REX Adapter Installation Settings

Record the settings using the worksheet provided for your database server.

Table 7 REX Adapter Installation Settings–SQL Server

Variable	Definition
DBSERVER	
DBPORT	
DBNAME	
DBUSER	
DBPW	

Table 8 REX Adapter Installation Settings–Oracle® Database (Windows or Linux)

Variable	Definition
DBSERVER	
DBPORT	
SID	
DBUSER	
DBPWD	

Directory Integration Settings (If Applicable)

LDAP Server Configurations

Table 9 Directory Integration–LDAP Server Settings

Requirement	Setting
Datasource name	
Datasource description (<i>optional</i>)	
Protocol	
Server product and version	
BindDN	
Host	
User BaseDN	
Port number	
Password	

Configure Authentication

Configure Mapping

Table 10 Directory Integration–Mapping Configurations

Requirement	Setting/Mapping Attribute
Mapping name	
Mapping description (<i>optional</i>)	
Person data:	
■ First Name	
■ Last Name	
■ Login ID	
■ Personal Identification	
■ E-mail Address	
■ Home Organization Unit	
■ Password	

Configure Events

Table 11 Directory Integration–Event Configurations

Requirement	Setting
EUABindDN	

Mappings Settings

Table 12 Directory Integration–Mappings Settings

Requirement	Setting
First name	
Last name	
Login ID	
Person identification	
E-mail address	
Home organization unit	
Password	
Role list	

Events Settings

Table 13 Directory Integration–Events Settings

Requirement	Setting
EUABindDN	

Cloud Administrator and Organization Settings

Table 14 Cloud Administrator and Organization Settings

Requirement	Setting	
nsAPI user credentials:	Username	
	Password	
	Current role assigned	
	Current organization assigned	
REX adapter user credentials	Username	
	Password	
	Current role assigned	
	Current organization assigned	
Cloud Administrator–Organization	Organization name	
Cloud Administrator–User credentials	Username	
	Password	
	Current role assigned	
	Current organization assigned	

Agent Properties Settings

REX Set REX Agent Configuration Settings

Table 15 REX Set REX Agent Properties Settings

Requirement	Setting
REXOutboundAdapter.Username - Username	
REXOutboundAdapter.Password - Password	

REX Agent Configuration Settings

Table 16 REX Set REX Agent Properties Settings

Requirement	Setting
REX username	
REX password	
Prime Service Catalog Request Center URL	

Set HTTP Properties Configuration Settings

Table 17 HTTP Agent Settings

Requirement	Setting
Process Orchestrator hostname	
Process Orchestrator Web Service URL	
Authentication Scheme (NTLMv2, NTLM or Basic)	
Process Orchestrator username	
Process Orchestrator password	
Process Orchestrator domain	
Prime Service Catalog hostname	
Prime Service Catalog Service Link URL	

E-mail Addresses for Queue Notifications

Table 18 E-mail Addresses for Queue Notifications

Queue	E-mail Address(es)
Default Service Delivery	
Cloud Service Cancellation	
Cloud Service Delivery Management	
Cloud Service Lease Administration	
Cloud Service Remediation	

Cloud Platform Connection Settings

VMware vCenter Server Connection Settings

Table 19 VMware vCenter Server Connection Settings

Platform Element	Requirement	Setting
VMware vCenter Server	Host name	
	Port	
	Secure connection protocol? (T/F)	
	Username	
	Password	

Cisco UCS Manager Connection Settings

Table 20 Cisco UCS Manager Connection Settings

Platform Element	Requirement	Setting
Cisco UCS Manager	Host name	
	Port	
	Secure connection protocol? (T/F)	
	Ignore certificate error? (T/F)	
	Time zone	
	Username	
	Password	

Provisioning Settings

Figure 1 Provisioning Settings

Requirement	Setting
Cisco SP time zone	
Default virtual server clone timeout	
Cloud duplicate alert suppression time period	
Cloud Domain	
Cloud Domain User	
Cloud Domain Password	
Cloud Default Time Zone Linux	
Cloud Default Time Zone Windows	

System-wide Service Options

Figure 2 System-wide Service Options

Name	Setting
Virtual Machine From Template Ordering	
Virtual Machine and Install OS Ordering	
ESXi Provisioning	
Community VDC Ordering	
Virtual Data Center Ordering	
Advanced Network Services	
Multiple Security Zones	
Enhanced VM Security	
High Availability	
Load balancing Services	
Application Configuration Management	
Service Assurance Names	

Network Settings

Figure 3

Figure 4 <network_type> Network Settings

Requirement	Setting
Network name	
Subnet address specification (IP address/ routing prefix)	
Community network	
Public network	

POD Settings

Figure 4 <network_type> Network Settings (continued)

Requirement	Setting
Network type	
NetworksSource	
vCenter portgroup	
UCS VLAN	
Subnet mask	
Gateway address (if other than default)	
FHRP1 address	
FHRP2 address	
Broadcast address (if other than default)	
Primary DNS address	
Secondary DNS address	

POD Settings

Figure 5 Community VDC Settings

Requirement	Setting
Name	
Description	
VMware vCenter Instance	
VMware Datacenter	
Cisco UCS Manager Instance	

Community VDC Settings

Figure 6 Community VDC Settings

Requirement	Setting
POD	
VMware vCenter Datacenter	

Standards Settings (Optional)

If you have opted not to modify any standards settings for these service options, check the following check box:

No standard settings have been modified from the default values.

Lease Term Standards

If you added new lease terms, record the information in [Table 21 on page 101](#). If you have not added new lease terms, check the check box below.

Lease term standards have not been modified from the default values.

Standards Settings (Optional)

Table 21 Lease Term Settings

Template	Requirement	Settings
New lease duration	Lease term (for example, 6 months)	
	Runtime (seconds)	
	Storage (seconds)	
	Warning 1 (seconds)	
New lease duration	Lease term (for example, 6 months)	
	Runtime (seconds)	
	Storage (seconds)	
	Warning 1 (seconds)	
New lease duration	Lease term (for example, 6 months)	
	Runtime (seconds)	
	Storage (seconds)	
	Warning 1 (seconds)	
New lease duration	Lease term (for example, 6 months)	
	Runtime (seconds)	
	Storage (seconds)	
	Warning 1 (seconds)	

Operating Systems Standards

No operating systems standards have been added or modified.

Table 22 Operating System Standards Settings

OS Type (Windows, Linux, ESXi)	OS System
Linux	
Windows	
ESXi	
New operating system standard—OS Type	
New operating system standard—OS Type	
New operating system standard—OS Type	

Server Size Standards

No server size standards have been added or modified.

Standards Settings (Optional)

Figure 7 Server Size Standards Settings

Size Label	Component	Setting
Small	CPUs	
	Memory (GB)	
	Storage (GB)	
Medium	CPUs	
	Memory (GB)	
	Storage (GB)	
Large	CPUs	
	Memory (GB)	
	Storage (GB)	
New server size standard (optional)	Size label	
	CPUs	
	Memory (GB)	
	Storage (GB)	
New server size standard (optional)	Size label	
	CPUs	
	Memory (GB)	
	Storage (GB)	
New server size standard (optional)	Size label	
	CPUs	
	Memory (GB)	
	Storage (GB)	

VDC Size Standards

No VDC size standards have been added or modified.

Standards Settings (Optional)

Table 23 VDC Size Standards Settings

Size Label	Component	Setting
Small	Maximum virtual servers	
	Maximum vCPU	
	Maximum memory (GB)	
	Maximum total storage (GB)	
	Maximum physical servers	
	CPU limit (MHz)	
	Resource pool CPU reservation (MHz)	
	Resource pool memory reservation (GB)	
	Number of snapshots	
	VDC	
Medium	Maximum virtual servers	
	Maximum vCPU	
	Maximum memory (GB)	
	Maximum total storage (GB)	
	Maximum physical servers	
	CPU limit (MHz)	
	Resource pool CPU reservation (MHz)	
	Resource pool memory reservation (GB)	
	Number of snapshots	
	VDC	
Large	Maximum virtual servers	
	Maximum vCPU	
	Maximum memory (GB)	
	Maximum total storage (GB)	
	Maximum physical servers	
	CPU limit (MHz)	
	Resource pool CPU reservation (MHz)	
	Resource pool memory reservation (GB)	
	Number of snapshots	
	VDC	

Standards Settings (Optional)

Table 23 VDC Size Standards Settings (continued)

Size Label	Component	Setting
New VDC size standard (optional)	Maximum virtual servers	
	Maximum vCPU	
	Maximum memory (GB)	
	Maximum total storage (GB)	
	Maximum physical servers	
	CPU limit (MHz)	
	Resource pool CPU reservation (MHz)	
	Resource pool memory reservation (GB)	
	Number of snapshots	
	VDC	
New VDC size standard (optional)	Maximum virtual servers	
	Maximum vCPU	
	Maximum memory (GB)	
	Maximum total storage (GB)	
	Maximum physical servers	
	CPU limit (MHz)	
	Resource pool CPU reservation (MHz)	
	Resource pool memory reservation (GB)	
	Number of snapshots	
	VDC	
New VDC size standard (optional)	Maximum virtual servers	
	Maximum vCPU	
	Maximum memory (GB)	
	Maximum total storage (GB)	
	Maximum physical servers	
	CPU limit (MHz)	
	Resource pool CPU reservation (MHz)	
	Resource pool memory reservation (GB)	
	Number of snapshots	
	VDC	



Required Privileges for vCenter Service Account

This appendix serves as reference for ensuring the service account used for Cisco IAC to connect and manage vCenter Server objects has the required, specific security privileges. To enable these permissions:

1. Connect vSphere Client to vCenter Server.
2. Click **Home**, then click **Roles**.
3. To create a new user role, right-click on a blank area and choose **Add**.
4. Enter a name (for example, "IAC Service Account").
5. Expand each category identified in the list below.
6. Check each privilege identified in the list below.
7. Repeat Steps 5 and 6 for each privilege.
8. Click **OK**.

Note: Be sure to add permission for this role to each datacenter to be managed by IAC.

Privilege List

The following privileges are used by Cisco IAC to manage vCenter Servers.

✓	Privilege
ALARMS	
	Acknowledge Alarm
	Create Alarm
	Disable Alarm Action
	Modify
	Remove
	Set alarm status
AUTODEPLOY	
	Host
	Image Profile
	Rule
	RuleSet
	Create Folder
DATACENTER	
	Create Datacenter

Privilege List

✓	Privilege
	Ip Pool Configuration
	Move
	Remove
	Rename
DATASTORE CLUSTER	
	Configure a datastore cluster
DATASTORE	
	Allocate Space
	Browse Datastore
	Configure Datastore
	Enumerate Datastores
	Low Level File Operations
	Remove Datastore
	Remove File
	Rename Datastore
	Update Virtual Machine Files
DVPORT GROUP	
	Create
	Delete
	Modify
	Policy Operation
	Scope Operation
ESX AGENT MANAGER	
	Config
	Modify
	View
EXTENSION	
	Register Extension
	Unregister Extension
	Update Extension
FOLDER	
	Create
	Delete
	Move
	Rename
GLOBAL	
	Act as vCenter Server
	Cancel Task
	Capacity Planning
	Diagnostics

Privilege List

✓	Privilege
	Disable Methods
	Enable Methods
	Global Tag
	Health
	Licenses
	Log Event
	Manage Custom Attributes
	Proxy
	Script Action
	Service Managers
	Set Custom Attribute
	Settings
	System Tag
HOST PROFILE	
	Clear
	Create
	Delete
	Edit
	Export
	View
HOST / CONFIGURATION	
	Advanced settings
	Authentication Store
	Change date and time settings
	Change PciPassthru settings
	Change Settings
	Change SNMP Settings
	Connection
	Firmware
	Hyperthreading
	Image Configuration
	Maintenance
	Memory Configuration
	Network Configuration
	Power
	Query patch
	Security Profile and Firewall
	Storage Partition Configuration
	System Management

Privilege List

✓	Privilege
	System Resources
	Virtual Machine Auto-start Configuration
HOST / INVENTORY	
	Add Host to Cluster
	Add Standalone Host
	Create Cluster
	Modify Cluster
	Move Cluster or Standalone Host
	Move Host
	Remove Cluster
	Remove Host
	Rename Cluster
HOST / LOCAL OPERATIONS	
	Add Host to vCenter
	Create Virtual Machine
	Delete Virtual Machine
	Manage User Groups
	Reconfigure Virtual Machine
	Relay Out Snapshots
NETWORK	
	Assign network
	Configure
	Move network
	Remove
RESOURCE	
	Create Resource Pool
	Migrate
	Modify Resource Pool
	Move Resource Pool
	Query vMotion
	Relocate
	Remove Resource Pool
	Rename Resource Pool
VIRTUAL MACHINE CONFIGURATION	
	Add Existing Disk
	Add New Disk
	Change CPU Count
	Change Resource
	Configure Managed By
	Disk Change Tracking

Privilege List

✓	Privilege
	Disk Lease
	Display Connection Settings
	Extend Virtual Disk
	Host USB Device
	Memory
	Modify Device Settings
	Query Fault Tolerance Compatibility
	Query Unowned Files
	Raw Device
	Reload From Path
	Remove Disk
	Rename
	Reset Guest Information
	Set Annotation
	Settings
	Swapfile Placement
	Unlock Virtual Machine
	Upgrade Virtual Hardware
	VIRTUAL MACHINE / GUEST OPERATIONS
	Guest Operation Modifications
	Guest Operation Program Execution
	Guest Operation Queries
	VIRTUAL MACHINE / INTERACTION
	Acquire Guest Control Ticket
	Answer Question
	Backup Operation On Virtual Machine
	Configure CD Media
	Configure Floppy Media
	Console Interaction
	Create Screenshot
	Defragment All Disks
	Device Connection
	Disable Fault Tolerance
	Enable Fault Tolerance
	Power Off
	Power On
	Record Session on Virtual Machine
	Replay Session on Virtual Machine
	Reset

Privilege List

✓	Privilege
	Suspend
	Test Failover
	Test restart Secondary VM
	Turn Off Fault Tolerance
	Turn On Fault Tolerance
	Vmware Tools Install
VIRTUAL MACHINE / INVENTORY	
	Create from Existing
	Create New
	Move
	Register
	Remove
	Unregister
VIRTUAL MACHINE / PROVISIONING	
	Allow Disk Access
	Allow Read-only Disk Access
	Allow Virtual Machine Download
	Allow Virtual Machine Files Upload
	Clone Template
	Clone Virtual Machine
	Create Template from Virtual Machine
	Customize
	Deploy Template
	Mark as Template
	Mark as Virtual Machine
	Modify Customization Specification
	Promote Disks
	Read Customization Specifications
VIRTUAL MACHINE / STATE	
	Create Snapshot
	Remove Snapshot
	Rename Snapshot
	Revert To Snapshot