# **CSUI** Documentation

Release 1.410.18

Maslova

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CloudStack-UI is a project which purpose is to provide an easy-to-use, light, and user friendly frontend interface for the Apache CloudStack virtualization management system.

Apache CloudStack is a great product which is widely used. But its frontend is developed for administrators (from our point of view), not for cloud end users. Some of the interactions are not straightforward and unnatural to an average user and require quite a long time to adapt. Other reasons to develop the UI are connected with lack of functions like virtual machine statistics & charting, sophisticated resource accounting, and application management.

That's what we are trying to add to Cloudstack-UI. The work is still in progress. But for now we have already covered lots of features that make CloudStack more good-looking and intuitive.

Project on GitHub

Join CloudStack-UI LinkedIn Group

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# CHAPTER 1

Overview

CloudStack-UI is a project which purpose is to provide an easy-to-use, light, and user-friendly front-end interface for the Apache CloudStack virtualization management system.

Apache CloudStack is a great product which is widely used. But its front end is developed for administrators (from our point of view), not for cloud end-users. Some of the interactions are not straightforward and unnatural to an average user and require quite a long time to adapt. Other reasons to develop the UI are connected to the lack of functions like virtual machine statistics & charting, sophisticated resource accounting, and application management.

That is what we are trying to add to Cloudstack-UI. The work is still in progress. But for now we have already covered lots of features that make CloudStack more good-looking, intuitive and convenient.

Project on GitHub.

Join the CloudStack-UI LinkedIn Group.

# 1.1 Project History

This page provides some background about the project, describes what CloudStack-UI is, and why it was developed.

At Bitworks Software, we have been running an ACS public cloud for 3 years (actually we still run CS 4.3 cloud in production). And we have found that average users who are familiar with Digital Ocean, Amazon AWS, and other VPS management systems feel uncomfortable with original CloudStack UI and make a lot of operational mistakes. That is why we have decided to implement a convenient and neat end-user facing UI covering regular activities, which are important for day-to-day VM management.

There are several aims we strived to achieve with the new UI:

- 1. The first goal is to make the UI more intuitive in terms of usability, business processes and typical use-cases.
- 2. As nowadays people move further from desktop PCs and go full mobile, we wanted the UI to have a support for that. Having a full control of your cloud from a smartphone, what could be better?
- 3. One of the major goals we want to achieve is to build a UI that is possible to support for many years. That's why we have to use only modern technologies.

- 4. From the technical perspective we also want the UI to support additional meta-information like descriptions, colors, groups, helpers. All of that is not supported by the native UI and it could be used to add some additional semantics to the entities that user has: like Vms, snapshots and so on.
- 5. The next key point that we wanted to cover with the new UI is to have some extra features beyond the functionality that CloudStack provides, e.g. DNS management, helpdesk integration, PaaS management, runtime statistics charts and monitoring.
- 6. And a final goal is to have a community support that could help us to improve the product and provide better user experience for the CloudStack users.

# 1.2 Implementation Details

Designed compatible with Apache CloudStack 4.10 and has been tested for 4.9.

Powered by Angular and Material 2.

Tested and works fine in next modern browsers:

- Google Chrome 60.0.3112.78
- Chromium 60.0.3169.0
- Mozilla Firefox 54.0.1
- Safari 5.1.7
- Internet Explorer 11.483.150630

# 1.3 Documentation

The documentation for the project is presented in the *CloudStack-UI User Guide* that explains to average users how to use the UI when working with CloudStack. It also includes explanations on managers' part clarifying how to manage the cloud infrastructure via CloudStack-UI.

We hope the new features we support will be useful for both end-users and administrators.

## 1.4 How to Contribute

CloudStack-UI is an open-source project. It is developed by an open and friendly community. Everybody is welcome to contribute and engage with the community. We are happy to accept any contribution. You can contribute to the project development in various ways:

- 1. Share the information about the project with other people, try to install the UI and share your opinion with us and your colleagues.
- 2. Propose useful features. Ideas are always welcome.
- 3. Deploy it somewhere and inform us about your success story and we will share it in the adopters section.
- 4. Fix bugs and send us the PR.
- 5. Implement a feature from the Roadmap or simply make something new.
- 6. Support and promote the development of specific functions which are important to you and may be shared.
- 7. Provide testing environment for other deployment schemes. Now we interested in testing the app with

- (a) KVM with RBD
- (b) Xen with NFS, Local, RBD
- (c) Oher browsers and operating systems
- 7. Hire us for frontend or backend development of custom software development projects. Take a look at our website to know where we can be useful. Take a look at our presentation to learn more about us.

To contribute, just contact us via e-mail: info@bw-sw.com

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# CHAPTER 2

# CloudStack-UI User Guide

#### **Contents**

• CloudStack-UI User Guide

CloudStack-UI is created to make it easier for end-users to use cloud infrastructure - to view and use their cloud resources, including virtual machines, templates and ISOs, data volumes and snapshots, security groups, and IP addresses.

The documentation gives precise instructions on working with the interface. The UI is quite intuitive and user-friendly, but we still advise studying the documentation first to get deeper insight of the features.

Here is the documentation structure:

# 2.1 Start Working With CloudStack-UI

### Contents

- Start Working With CloudStack-UI
  - Logging In
  - Resource Usage
  - Notifications on Pending Operations

This page is aimed to help you to make first steps at CloudStack-UI. If you have never worked with CloudStack before, you should start with installing the CloudStack platform. Follow the instruction in the official documentation.

Then deploy CloudStack-UI (see the instructions for deployment).

## 2.1.1 Logging In

To enter the platform use your credentials provided by an administrator:

**Note:** Required fields are marked with asterisks (\*).

- Login \* The user ID of your account.
- Password \* The password associated with the user ID.
- Domain Specify domain when you log in. CloudStak-UI supports three ways to do it. Choose the one which
  is more convenient for you:
  - 1. Enter a domain in the field under the "Show advanced options" button
  - 2. Administrator can set a domain in configurations. Domain field will be prepopulated with the specified value. It is more convenient for a user as he/she does not need to enter the domain every time at logging in. In this case the domain field can be hidden by clicking .
  - 3. Other way to log in is to enter a URL in the format http://<ip-address>/login? domain=<domain>. The domain will be prepopulated in the logging in form with the value that is specified in the URL. Please, note, the domain value in URL will override the domain set in the configurations by Administrator. Find more information on the feature configuration at the *Configurations page* (link here).

Push "Login" to proceed to CloudStack. You will see the first section - Virtual Machines.

To the left you can see the main navigation bar. It allows moving from section to section. It is configured by Root Administrator in the configuration file. The administrator can set it adjustable, i.e. allow a user to reorder elements in the main navigation bar (except the "Logout" section). Please, see the Administration\_Guide for more information on configuring the navigation bar elements reordering.

# 2.1.2 Resource Usage

In this section you can see the resource statistics: used and free VMs, computational resources, volumes and storage space.

Unfold Resource Usage panel in the upper part of the screen. It provides information on the following resources:

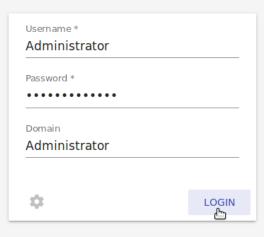
- 1. Virtual machines;
- 2. Computational resources CPU, RAM;
- 3. Volumes and snapshots;
- 4. Storage primary and secondary.

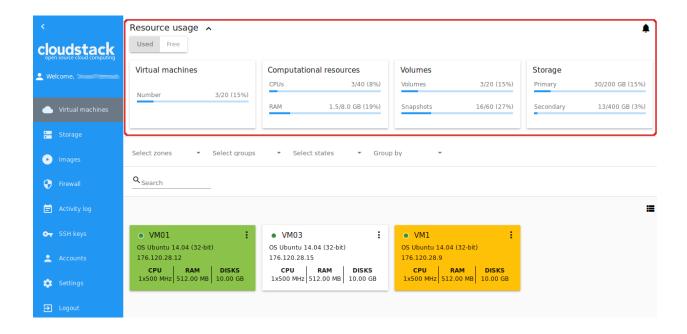
You can switch between used or free resources by clicking the option you need above the resource data list.

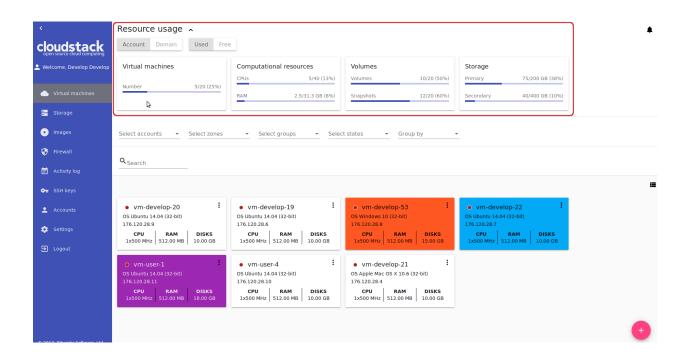
A user can see the resource usage statistics for his/her user only.

A Domain Administrator can view resources for his/her account and for the whole domain.



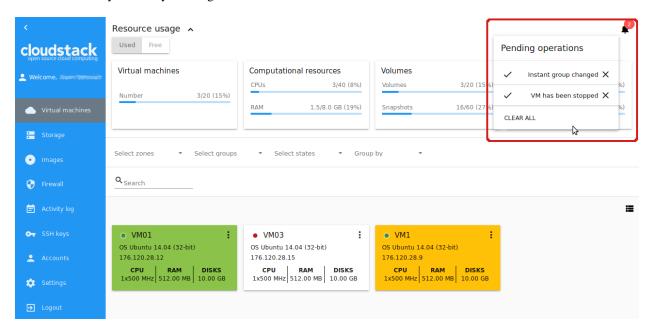






## 2.1.3 Notifications on Pending Operations

In the upper-right corner of the screen, you can see the list of pending operations by clicking a bell button . It informs you of the latest operations in the system. You can clear the list after its reviewing by deleting every notification one by one or by clicking "CLEAR ALL" at the list bottom.



## 2.2 Virtual Machines

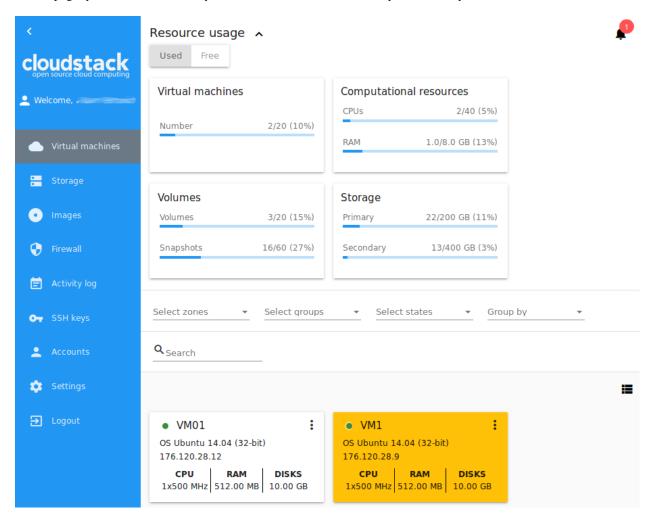


### - Access a Virtual Machine

*Virtual Machines* is the starting section. Here and in all other views we implemented the "one-step" approach, and we also made it work without moving from view to view. So all actions on VMs can be managed from one screen view.

#### 2.2.1 Virtual Machines List

At this page, you can see the list of your virtual machines available to your user only.



If you are a Domain Administrator you can see the virtual machines of all users in your account. Or select all accounts in the "Select accounts" option above the list to see the virtual machines for the whole domain.

You can change the data representation of existing virtual machines from "card" to "list". We have added the switch

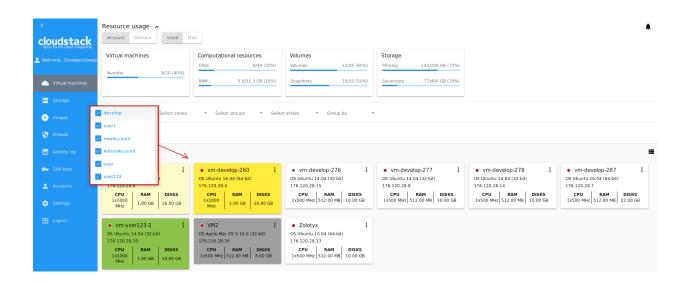
in the upper-right corner of each section. This improvement gives a user an opportunity to work with data in each specific section in a more convenient way.

A list view can be switched to a box view:

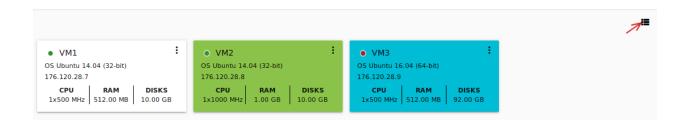
And vice versa, switch a list view to a box view:

For each VM in the list you can see the following information:

• VM name and IP;





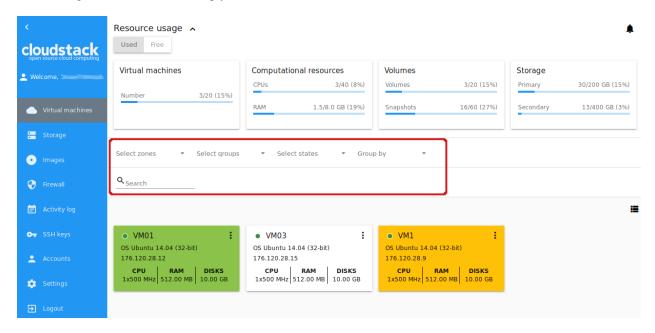


- State shows the VM state by color spot: green for Running, red for Stopped, yellow for changing status;
- · OS family;
- CPU;
- RAM;
- · Disks.

To the right the Actions button expands the list of actions available for the VM.

### **Filtering of Virtual Machines**

The filtering and search tool will help you to find a virtual machine in the list.



You can filter the VM list by accounts (available for Domain Administrators) and/or zones and/or groups and/or states. In the drop-down lists tick the filtering parameters and see the immediate result.

Besides, VMs can be grouped by zones and/or groups and/or colors and/or accounts. Grouping makes it easier to identify necessary VMs on the list.

Use the search tool to find a virtual machine by its name or a part of the name.

Under the Virtual Machines section, you can open a form to create a new virtual machine.

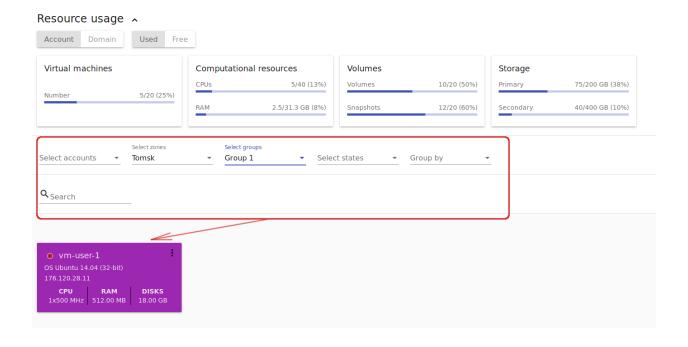
#### 2.2.2 Create a Virtual Machine

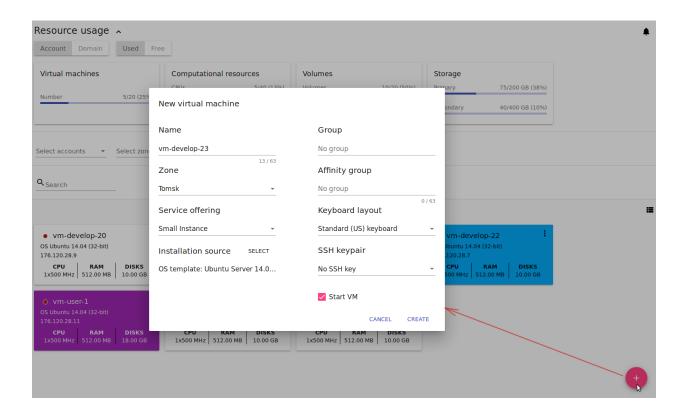
Creating a new VM in CloudStack-UI is a one-step action. You can select options from one screen without additional steps.

To create a new VM click the "Create" button at the bottom-right corner.

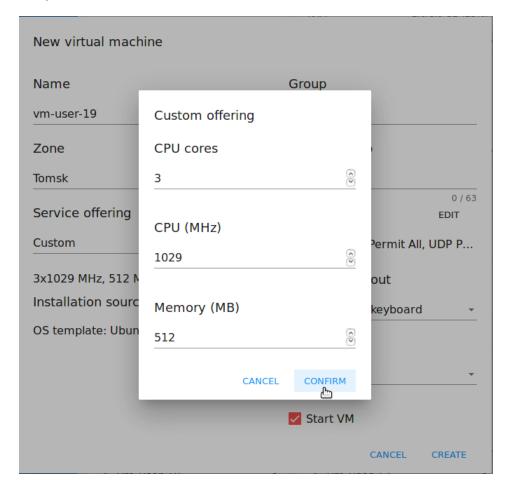
In the *Create VM* form fill in the following fields:

1. Name \* - A name of VM. The system suggests a meaningful autogenerated name in the following form vm-<username>-<counter>. You can enter any name you wish. It should start with a letter, contain figures and Latin letters (up to 63 symbols) and be unique within the domain.





- 2. Zone \* A zone of VM operation. Select a zone from the drop-down list. The list of available zones is managed by a Root Administrator. More information about zones in CloudStack can be found in the official documentation.
- 3. Service offerings \* Select from the drop-down a set of options and resources for a VM, such as templates for creating virtual machines, disk storage, and other. The list of available service offerings is managed by a Root Administrator or a Domain Administrator. Now among other options there is *Custom offerings*. The Custom offerings option allows setting your own settings for:
  - CPU cores;
  - CPU (MHz);
  - Memory (MB).



Click "Confirm" to set the custom service offerings. The custom settings will appear for the service offerings. You can change them by clicking "Change" next to the settings. Click "Cancel" to drop all the settings.

- 4. Installation source \* Click "Select" to choose an installation source. Traditionally, there are two options of the virtual machine creation:
  - From a Template.
  - · From an ISO file.

You will see a list in a modal window that contains templates/ISOs with the "Ready" status available for the selected zone, as well as user's account or the whole domain.

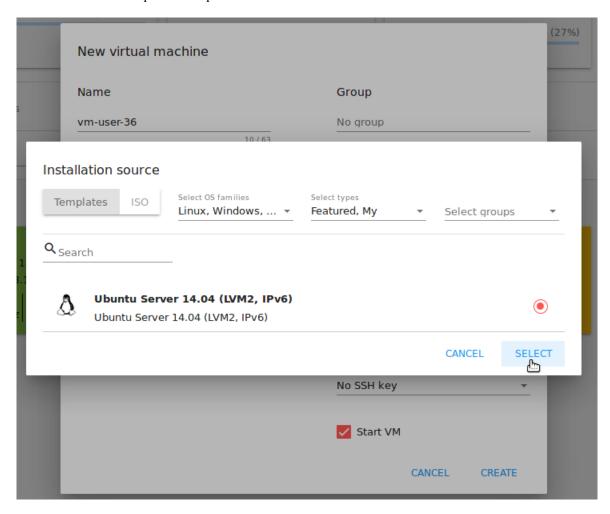
# New virtual machine

Name		Group		
vm-user-19		No group		
Zone	10 / 63	Affinity group		
Tomsk	*	No group		
Service offering		0 / 63 Firewall rules EDIT		
Custom	*	Based on TCP Permit All, UDP P		
5x1014 MHz, 557 MB CHANGE Installation source SELECT		Keyboard layout Standard (US) keyboard		
OS template: Ubuntu S	erver 14	SSH keypair		
		No SSH key		
		✓ Start VM		
		CANCEL CREATE		

The filtering tool allows finding a necessary option by selecting among templates/ISOs by OS families, types and groups, or search the source by a name or a part of its name.

Tick the source in the list and click "Select" to implement the selected source.

Click "Cancel" to drop selected options. No source will be selected then.



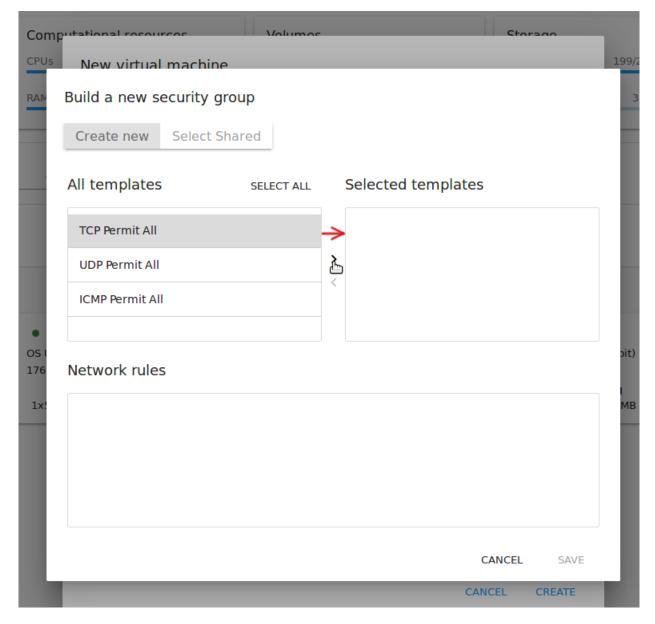
- 5. Disk offering Available if ISO is selected as a source. Select from the drop-down list the option on disk offerings. Change the disk size moving the slider up to the volume size you wish (if the selected disk offering has a custom disk size). Find more about disk offerings in the official documentation.
- 6. Group Select a group from the drop-down list. Or create a new group by typing its name right in the field.
- 7. Affinity group Select an affinity group from the drop-down list. Or create a new group entering it right in this field. The name should contain letters, figures, start from a letter and should not contain spaces. Its lenght should not exceed 63 symbols. What is an affinity group you can read in the official documentation.
- 8. Firewall rules Click "Edit" to specify a security group for the VM. In the appeared window choose between "Create new" or "Select Shared" options.

#### Create new security group

A new security group is created on the base of predefined templates. This security group will be created as a *private* group used for this VM only.

When creating a new security group, you can see all the templates are selected by default in the modal window. To form your custom security group, select a template in the "All templates" list at the left and move it to the "Selected

templates" list at the right by clicking the arrow icon:



Click "Select All" to move all templates from left to right at once.

Click "Reset" to drop all selected templates.

In the list below you will see the rules corresponding to the selected templates. All of them are checked as selected. Uncheck those you do not wish to add to your VM as firewall rules.

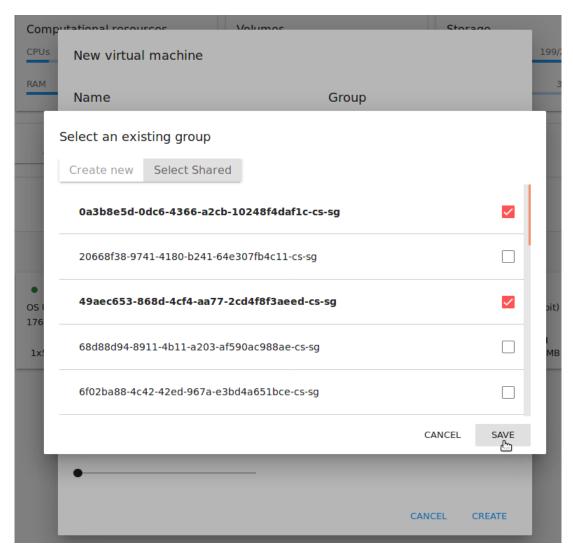
Click "Save" to apply the selected rules to your virtual machine.

Click "Cancel" to drop the selected options. No rules will be assigned to the virtual machine. You will return to the "Create new virtual machine" window.

#### Select Shared security group

If you would like to select an existing group of firewall rules, you can click the "Select Shared" option and tick those groups in the list that you want to assign to your VM. The security groups in the *Shared* list are used by other VMs in

the domain. That means you won't be able to uncheck some rules in the group that you do not want to include into the list (like at creating VM from a template). You can assign only the whole shared secutity group to your VM.



You can edit a shared security group after VM is created. In the *Network* tab of the VM details sidebar the assigned shared security group(s) can be viewed and edited. Please, find more information on security group editing in the *Network Tab* section.

Click "Cancel" to drop the selected options. No rules will be assigned to the virtual machine.

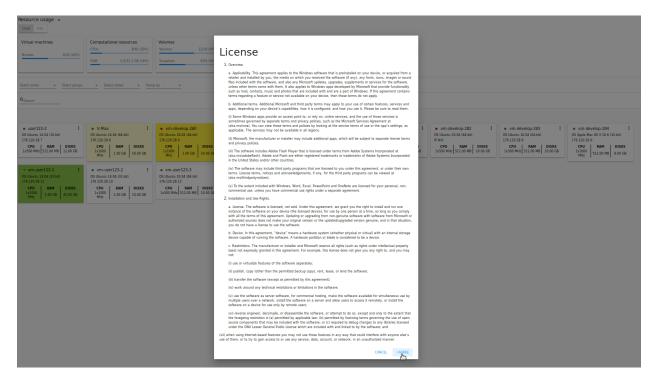
- 8. Keyboard layout (is prepopulated). Select a keyboard layout from the drop-down list.
- 9. SSH keypair Select an SSH keypair. The list of keys contains the SSH keys available for the account under which the VM is being created. Find more information on SSH keys in the SSH Keys section.
- 10. Start VM Tick the box to start the VM right after its deployment. If this option is activated, the VM acquires an IP and a password (if required by the template). If it is not, the machine IP is not available till VM is started, no password is assigned to it.

**Note:** Required fields are marked with an asterisk (\*).

Once all fields are filled in, click "Create".

For some templates/ISO used at VM creation you are offered to accept the "Template/ISO Terms and Conditions Agreement". An administrator is able to specify an agreement for a template or ISO. An agreement may determine, for example, software licensing terms or restrictions on the liability of the software template vendor. A user must confirm it to continue VM installation from a chosen source.

If you are creating a virtual machine on the base of a template/ISO that requires an agreement, read the terms in the appeared window and click "Agree" to continue.



Click "Cancel" to close the terms and move back to the creation form. Change the installation source.

After clicking "Create", a dialogue window will appear where you can monitor the VM creation process: security group creation, virtual machine deployment, template tags copying, etc. These procedures are fulfilled one by one. A procedure in progress is marked with a spinner in the message. In case of an error occurring at any VM creation step, a user can understand at what step it has happened.

Once the VM creation process finishes, the success message will inform you of that.

The message will show the list of all creation steps and the virtual machine information:

- VM name and IP (if it is available),
- VM Password This field appears after the VM creation, if a password is enabled for the template used for creating this machine. A password is autogenerated. Click "Save" next to it in the dialogue window if you want to save it for this VM. The password will be saved to the VM tags. You can see the saved password later by clicking "Access VM" in the Actions box for this machine.

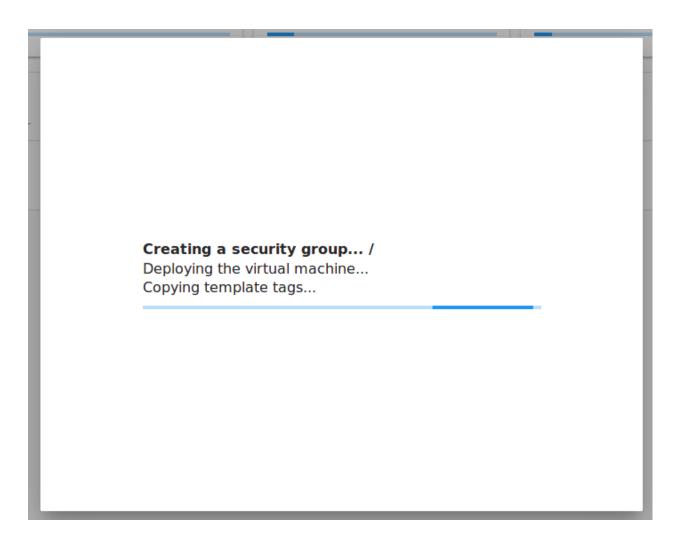
The system will ask you if you wish to save passwords to VM tags by default for the virtual machines created in the future. Click "Yes" and the "Save VM password by default" option will be activated in the account settings:

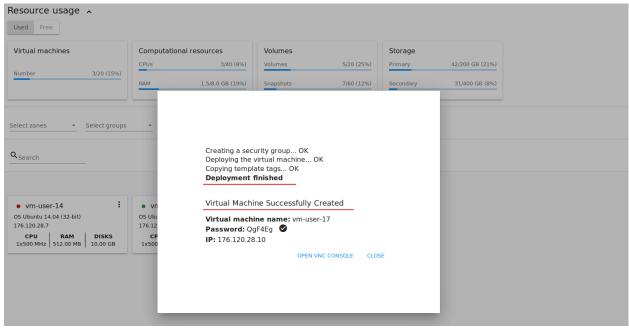
It means the password will be saved to tags automatically for all created virtual machines.

From this window, you can access the VM opening VNC console.

Close the dialogue window and make sure the newly created VM is in the list of virtual machines.

Click "Cancel" to drop the VM creation.







## Possible Issues When Creating a Virtual Machine

You can face the following issues when creating a virtual machine:

· Lack of resources.

An important thing in CloudStack-UI is that the system immediately checks that a user has the amount of resources required to create a virtual machine. It doesn't allow launching the creation of a VM which will fail for sure because of the resource lack.

If you lack the required amount of resources, the message will appear when clicking "Create Virtual Machine":

"Insufficient resources

You ran out of Primary storage"

No VM creation form is available.

• VM name is not unique.

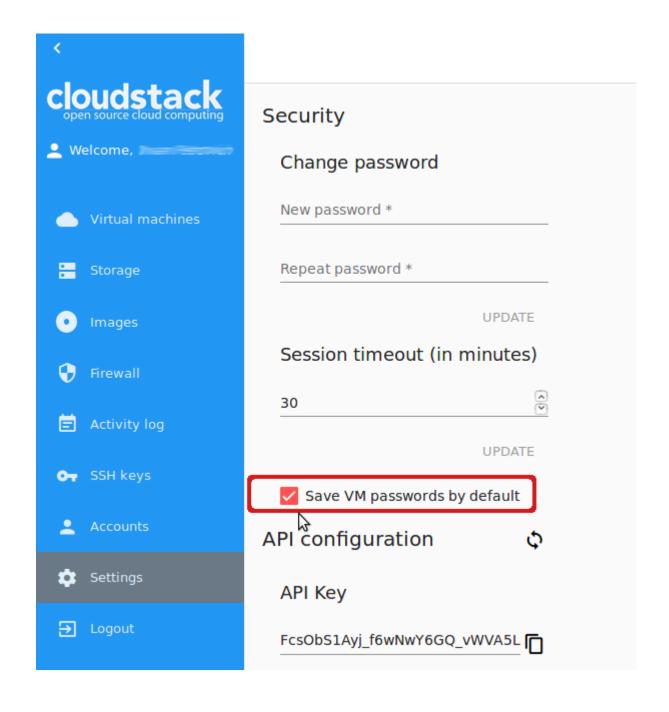
If the name specified for the virtual machine is not unique within a domain, the dialogue window after VM creation will show an error. The VM will not be created. The creation form will be closed. You will have to open the VM creation form and fill it in again. You will have to specify another name for your VM.

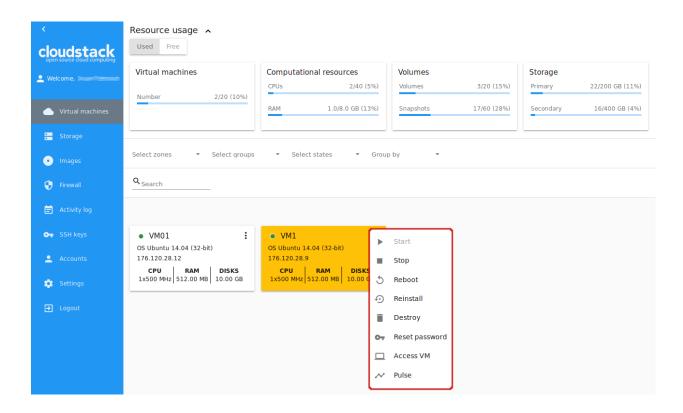
#### 2.2.3 VM Action Box

Once a VM instance is created, you can stop, restart, or delete it as needed. These actions are available under the "Actions" button to the right from each virtual machine in the list.

It allows performing the following actions with the VM:

• Start VM - Allows a user to launch a VM,





- Stop VM Allows a user to stop a running VM,
- Reboot VM Allows a user to restart a VM,
- Reinstall VM Allows a user to reinstall a VM,
- Destroy VM Allows a user to delete a VM. After deleting the virtual machine will remain in the system. It will look faded in the list and can be recovered later.

To recover a destroyed VM (which is not expunged) open the Actions list and click "Recover".

Click "Expunge" to completely destroy the VM. The VM will not be available for recovering anymore.

When deleting a virtual machine, if the machine has data disks attached, the system will ask you in a dialogue window whether these disks should be deleted. Confirm your intention to delete them by clicking "Yes". Click "No" to cancel the disk deleting.

• Reset password - Allows a user to change the password for VM (available for started VMs only in case a VM requires a password). The VM will be rebooted if you reset the password.

After clicking "Yes" the VM will be rebooted and a new password will be autogenerated for it. You will see the new password in the dialogue window.

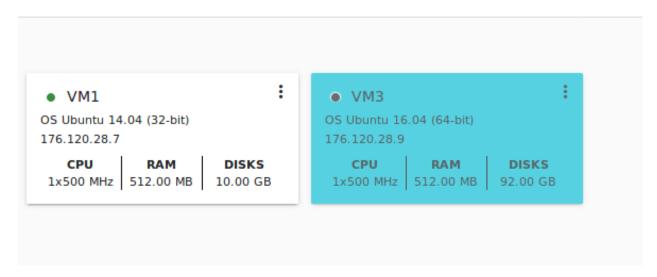
Click "Save" to save the password for this VM. It will activate the "Save VM passwords by default" option in the *Settings* section. In the future the password will be saved automatically right at VM creation. Click "OK" to close the dialogue window.

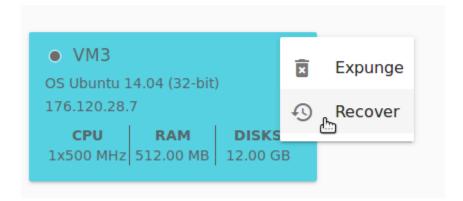
Access VM - Opens an "Access VM" dialog window which allows to view VM name and IP, view and save a
password for the VM and access the VM via the VNC console.

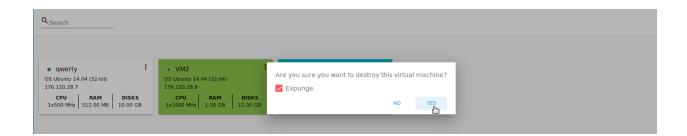
In the Access a Virtual Machine section you can find more information on accessing a VM.

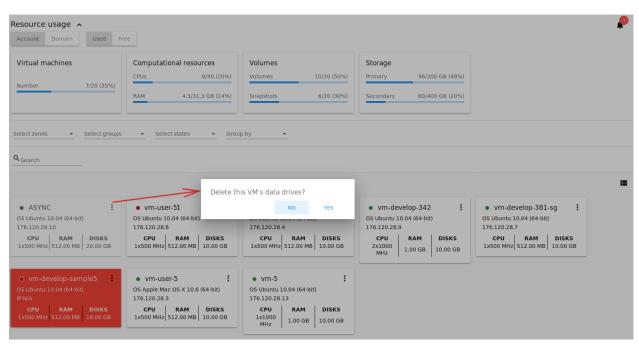
• Pulse - It is a new feature created in CloudStack-UI to visualize the VM performance statistics. By clicking "Pulse" at the Actions box you will open a modal window with 3 tabs: CPU/RAM, Network, Disk. There you can see the charts of resources statistics for the VM.

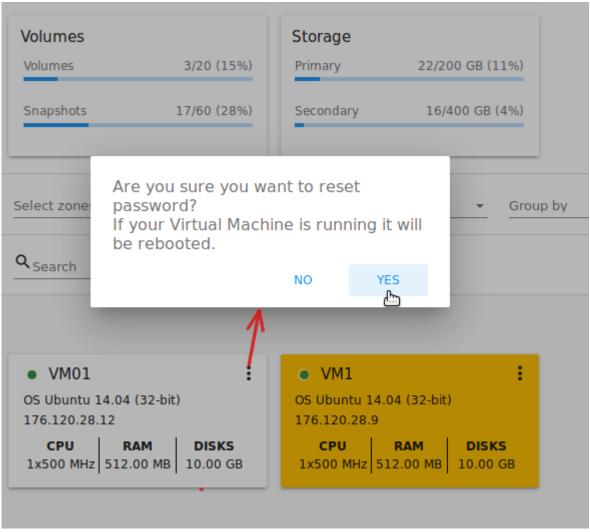


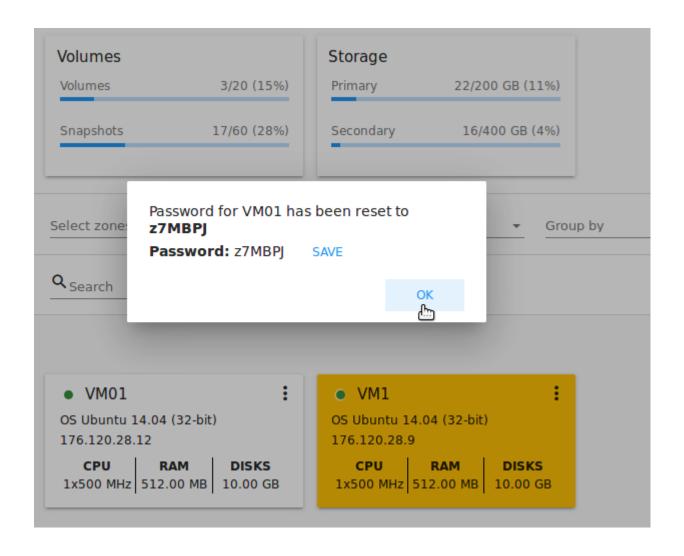




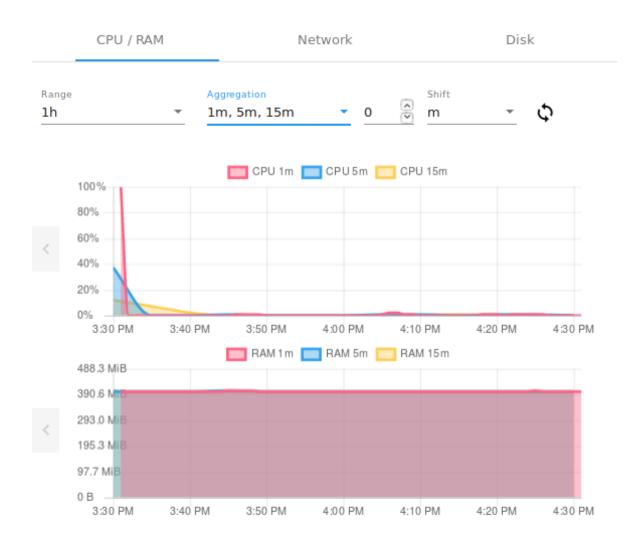












You can adjust the graphs by range, data aggregation period, shift interval and other parameters.

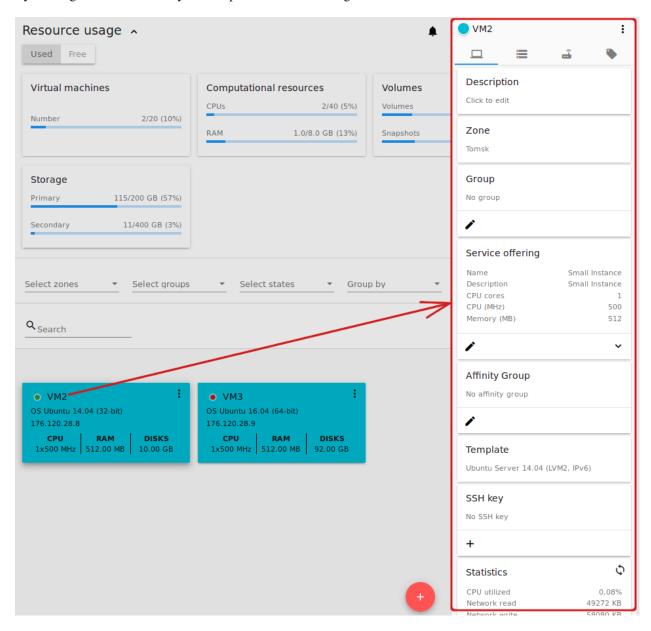
This plugin is convenient for dynamic monitoring of VM performance. Find more information about it in the official documentation. Pulse plugin deployment instructions can be found at the page.

**Note:** Please, note, when performing one of the actions from the list, other actions in this list are disabled until the action in progress finishes.

#### 2.2.4 VM Details Sidebar

For each virtual machine you can get the details.

By clicking a VM line or card you can open a sidebar to the right.



There you will find the information on the selected virtual machine:

- 1. VM name.
- 2. Color-picker - Allows marking a virtual machine by a color to distinguish it in the list.
- 3. Actions on the VM. See the VM Action Box section below.

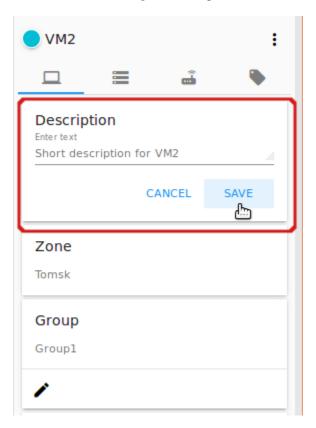
You will see four tabs in the sidebar. Let's describe what information on the virtual machine is presented in each tab.

#### **Virtual Machine Tab**

The Virtual Machine tab contains the general setting of the VM. Some settings can be edited here. At the bottom you can see the Statistics section which shows real-time data for the VM performance.

1. Description - A short description of the VM. Click the block to edit it. Enter a few words about the VM. Click "Save" to save the description. It is a custom description for your machine. It is saved to tags with csui.vm. description tag.

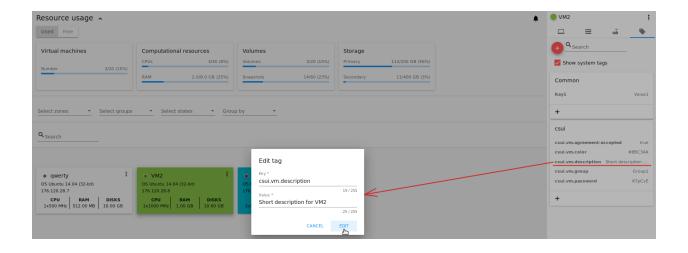
The description can be edited. Click "Edit" to change the description.

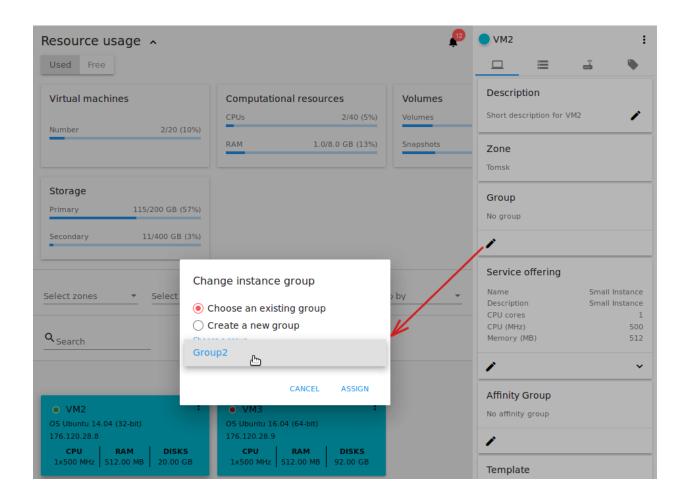


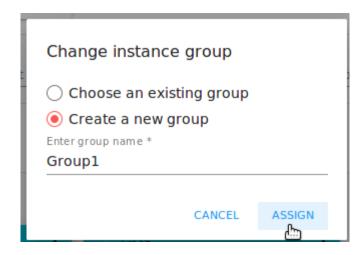
It also can be edited from the Tags tab. Click "Edit" next to the csui.vm.description tag and change the description text in the appeared form.

- 2. Zone A zone selected for the VM to be available in.
- 3. Group A custom group assigned to the VM. Edit this field by clicking the "Edit" button . In the appeared dialogue window choose a group from the drop-down list. Click "Assign" to assign the chosen group to the VM.

Or you can create a new group right from this window selecting the "Create a new group" option. Click "Assign" to assign the created group to the VM.







To remove the assigned group select the "Remove from the group" option and click "Remove" to eliminate the assigned group from the VM.

The VM group is a custom group. It is saved to VM tags with csui.vm.group tag. From the Tags tab it also can be edited or deleted.

- 4. Service offering The offerings of the VM. Expand the section to view the whole list of offerings. Edit this field by clicking the "Edit" button. In the appeared window select a new option. Click "Change" to implement the edits. The started virtual machine will be rebooted at editing service offering.
- 5. Affinity Group The affinity group assigned to the virtual machine. Edit this field by clicking the "Edit" button. In the dialogue window, choose an existing group or create a new one right in the dialogue window. Click "Assign" to assign the group to the VM.

When assigning an affinity group to the started virtual machine, the system will suggest you stopping the VM. Click "OK" in the dialogue window. Then the VM will be started again.

The selected group can be removed by clicking "Edit" and choosing "Remove from the group" in the dialogue window.

- 5. Template Shows the template used to create the virtual machine.
- 6. SSH key Shows the SSH key of the virtual machine. Add the SHH key by clicking "+". In the appeared window select the SHH key form the drop-down list and click "Change":

At saving the new SSH key for a started VM you will see the warning: "You need to stop the virtual machine to reset SSH key." Click "OK" if you want to stop it right now. Click "Cancel" to drop the edits.

7. Statistics - shows VM statistics on CPU utilized, Network read, Network write, Disk read, Disk write, Disk read (IO), Disk write (IO). Refresh data by clicking the "Refresh" button in the upper-right corner.

#### Storage Tab

The second tab - Storage - contains the information on the volumes allocated to the virtual machine.

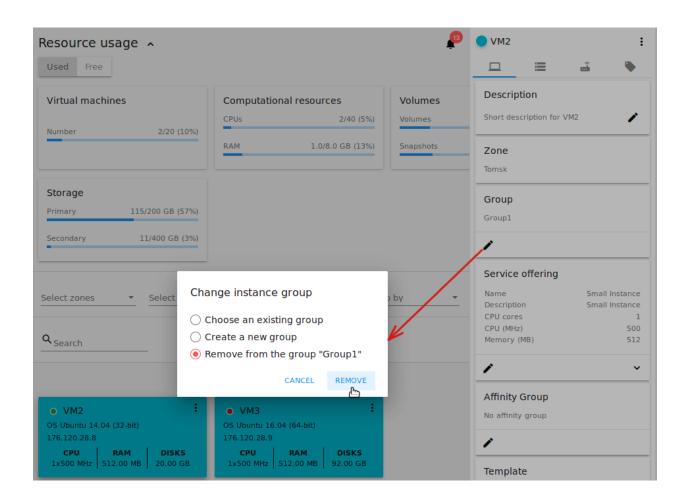
In this tab the following information is presented:

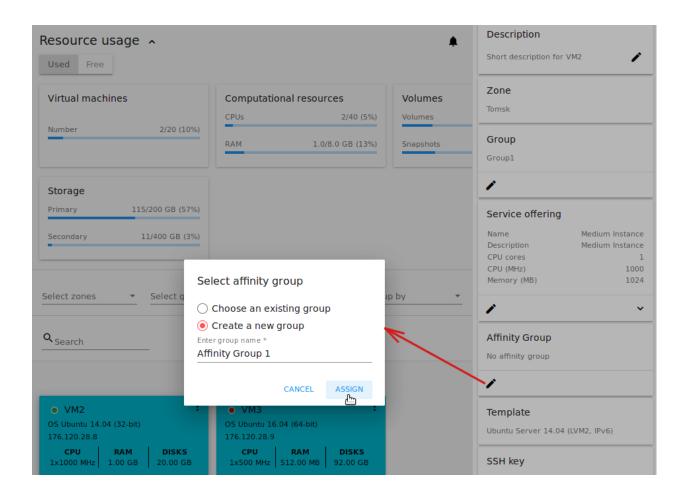
## 1. Disk information

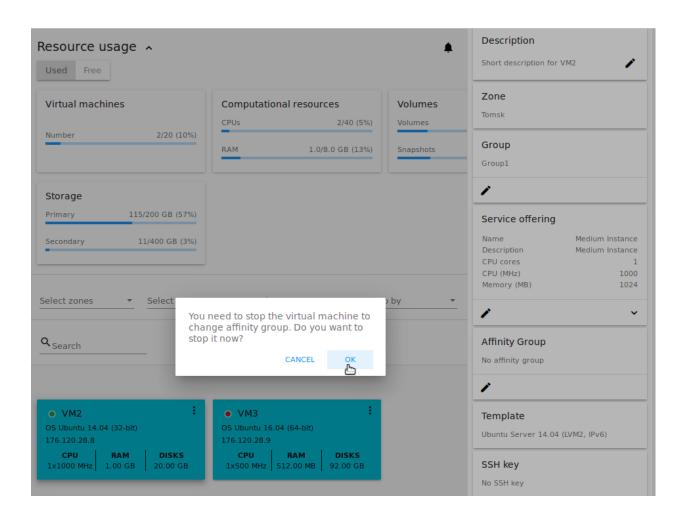
Each VM has a root disk. Besides, data disks can be added to the VM.

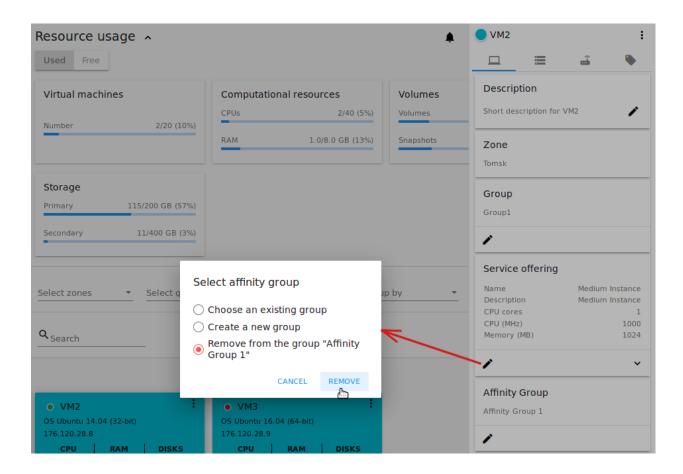
The following general information on a root disk is presented (expand the card to see the whole list):

• Name - The disk name.









- Size The disk size.
- Creation Date and Time.
- Storage Type (Shared/Local)
- Last Snapshot information.
- 2. Attach a volume Allows attaching a data disk to the VM.

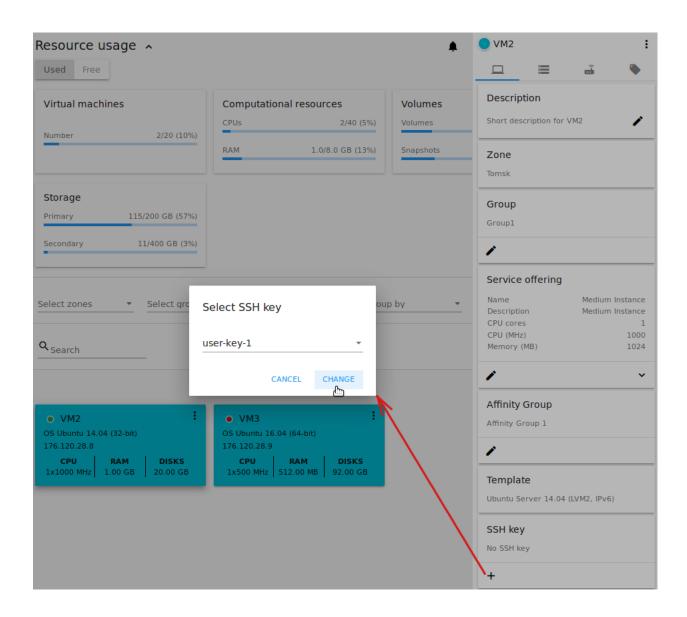
Additional volume (a data disk) can be attached to the VM. Click "Select" to select a data disk. Select a disk in the drop-down list and click "Select".

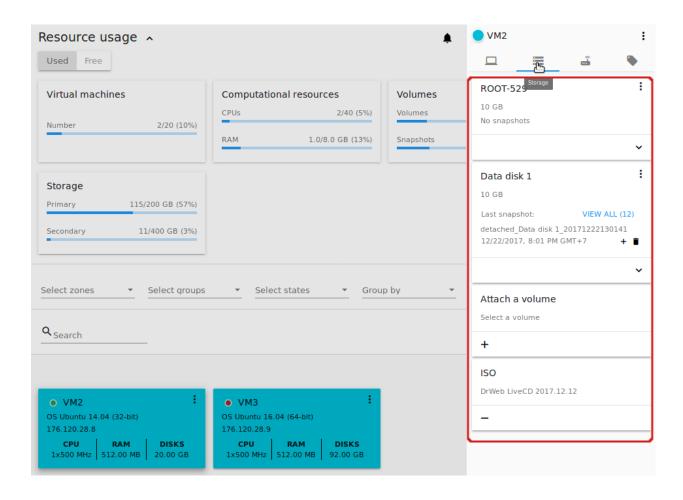
The chosen data disk will appear for the virtual machine with the "Attach" button. Click "Attach" to attach the selected disk to the virtual machine.

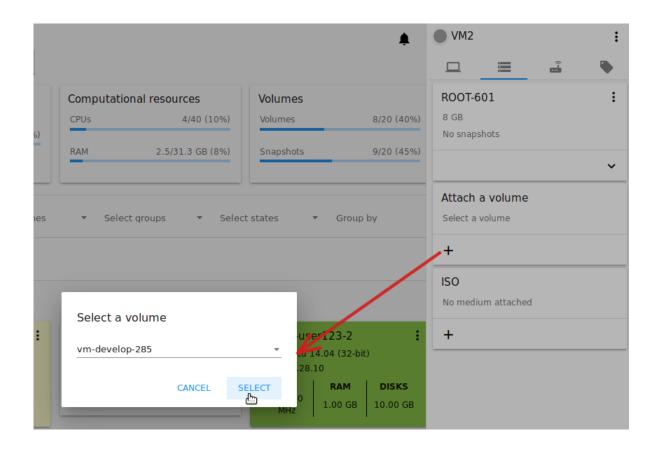
If there are no available spare drives yet, you can create one right from this panel.

Click "Create new volume" and you will be moved to the Storage section. A "New volume" form will appear where you should specify the following information:

- Name \* Name of the new data disk.
- Zone \* Select a zone for it from the drop-down list.
- Disk offering \* Select a disk offering from the drop-down list. The disk offering list is managed by Root Administrator.
- Size Set the disk size if it is available. Disk size can be changed if a custom disk offering is selected above.







**Note:** Required fields are marked with an asterisk (\*).

Once all fields are filled in, click "Create" to save the new volume.

Click "Cancel" to drop the new volume creation.

Move back to the virtual machine information sidebar. Under the "Storage" tab in the "Attach a volume" section click "+" to select an additional disk. Select a data disk in the drop-down list and click "Select" to add it to the "Attach a volume" section. To attach the volume press the "Attach" button.

## **Volume Action Box**

For each volume the Actions list can be opened by clicking the actions icon •.

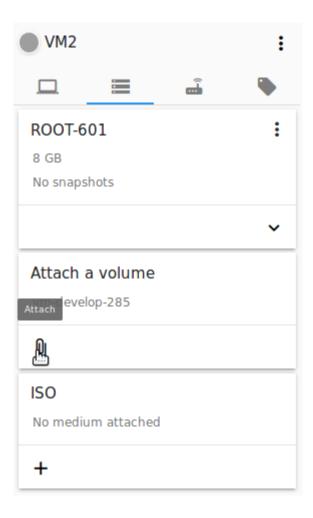
The following actions on disks are available in this list:

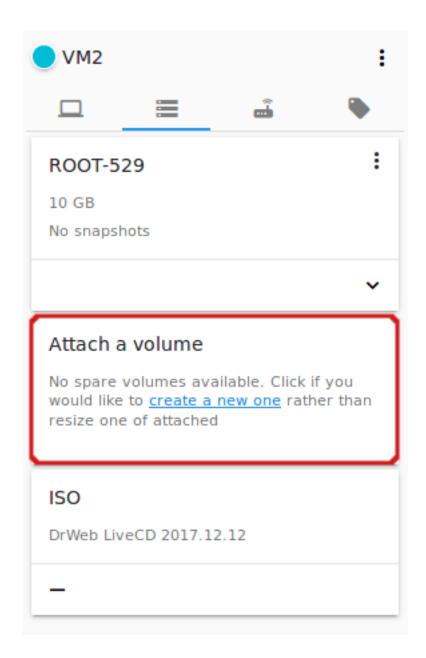
For root disks:

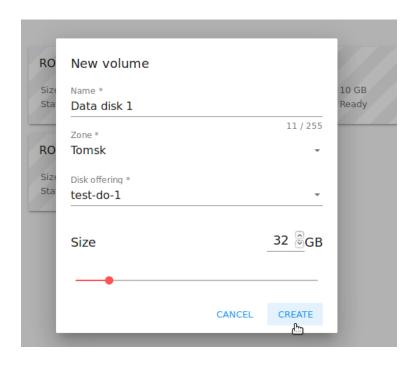
- Take a snapshot;
- Set up snapshot schedule;
- · Resize the disk.

For data disks:

- · Take a snapshot;
- Set up snapshot schedule;







- Detach;
- · Resize the disk;
- Delete.

# Take a snapshot

You can take a VM snapshot to preserve all the VM's data volumes as well as (optionally) its CPU/memory state. This is useful for quick restore of a VM.

Click "Take a snapshot" in the disk Actions list and in the dialogue window enter the following information:

- Name of the snapshot \* Define a name for the snapshot. It is auto-generated in the form <date>-<time>. But you can specify any name you wish.
- Description Add a description of the snapshot to know what it contains.

**Note:** Required fields are marked with an asterisk (\*).

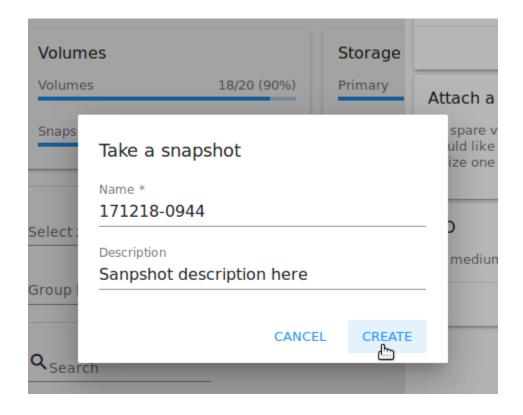
All snapshots are saved in the list of snapshots. In the disk information, you will see the name and time of the *last-taken snapshot*. For each snapshot the list of actions is available. Find more information on snapshot actions in the *Snapshot Action Box* sections below.

## Set up snapshot schedule

You can schedule regular snapshotting by clicking "Set up snapshot schedule" in the Actions list.

In the appeared window set up the schedule for recurring snapshots:

- Select the frequency of snapshotting hourly, daily, weekly, monthly;
- Select a minute (for hourly scheduling), the time (for daily scheduling), the day of week (for weekly scheduling) or the day of month (for monthly scheduling) when the snapshotting is to be done;
- Select the timezone according to which the snapshotting is to be done at the specified time;
- Set the number of snapshots to be made.



Click "+" to save the schedule. You can add more than one schedule but only one per each type (hourly, daily, weekly, monthly).

#### Resize the disk

**Note:** This action is available to data disks created on the base of disk offerings with a custom disk size. Disk offerings with custom disk size can be created by Root Administrators only.

Selecting "Resize the disk" option in the Actions list you are able to enlarge the disk size.

In the appeared window set up a new size using the slider and click "Resize" to save the edits.

Click "Cancel" to drop the size changes.

## **Detach**

This action can be applied to data disks. It allows detaching the data disk from the virtual machine.

Click "Detach" in the Actions list and confirm your action in the dialogue window.

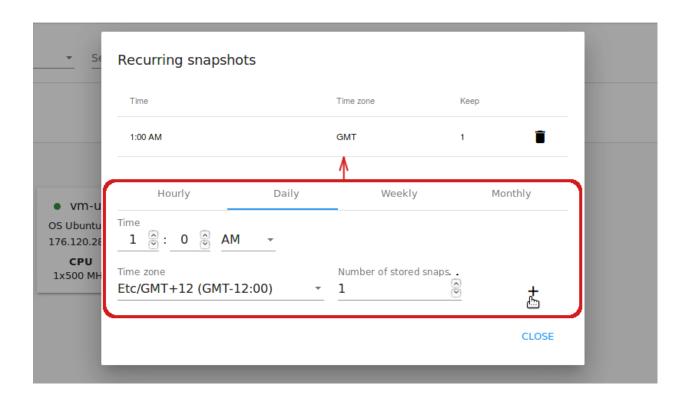
The data disk will be detached. It will be in the list of **Spare** drives in the *Storage* section.

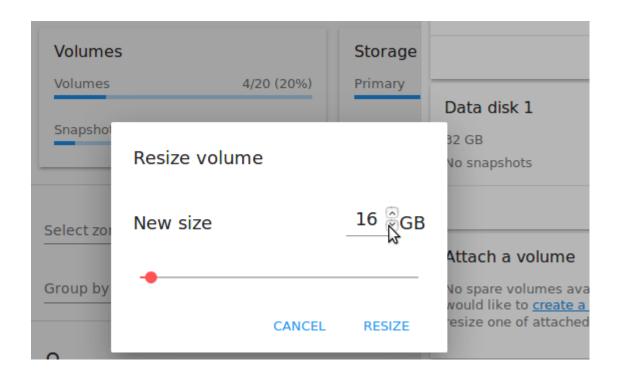
## **Delete**

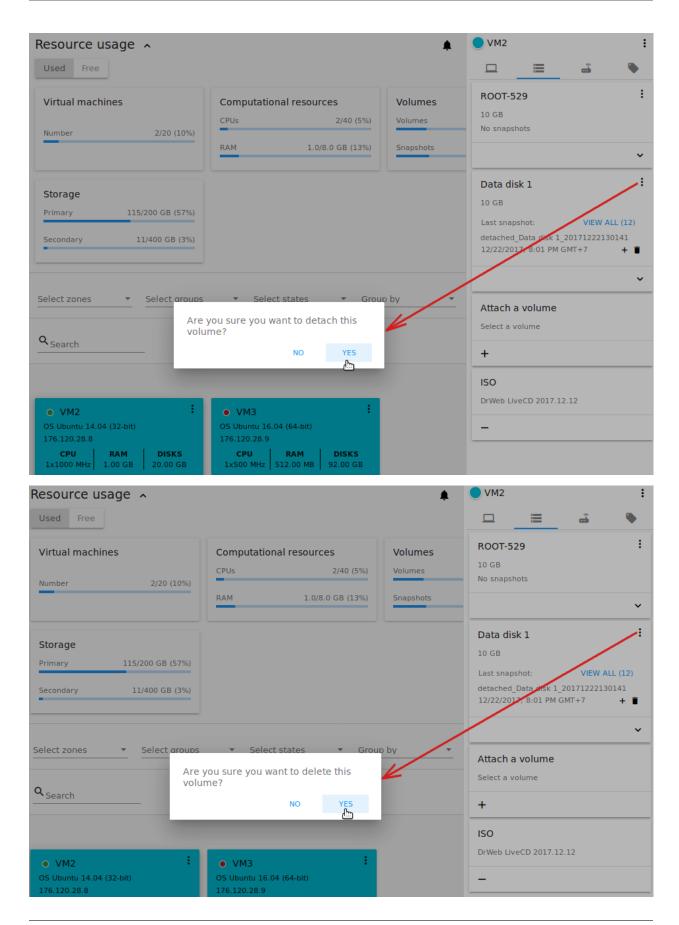
This action can be applied to data disks. It allows deleting a data disk from the system right in the *Storage* VM details sidebar.

Click "Delete" in the volume Actions list and confirm your action in the dialogue window.

The data disk will be deleted from the system right at this moment.







# **Snapshot Action Box**

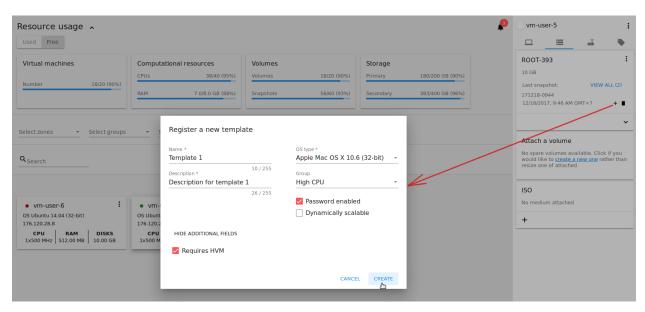
For each snapshot the following actions are available:

- Create a template Register a new template right from the disk information block of the sidebar. In the appeared window fill in the form:
  - Name \* Enter a name of the new template.
  - Description \* Provide a short description of the template.
  - OS type \* Select an OS type from the drop-down list.
  - Group Select a group from the drop-down list.
  - Password enabled Tick this option if your template has the CloudStack password change script installed.
     That means the VM created on the base of this template will be accessed by a password, and this password can be reset.
  - Dynamically scalable Tick this option if the template contains XS/VM Ware tools to support dynamic scaling of VM CPU/memory.

Note: Required fields are marked with an asterisk (\*).

Click "Show additional fields" to expand the list of optional settings. It allows creating a template that requires HVM. Tick this option in this case.

Once all fields are filled in click "Create" to create the new template.

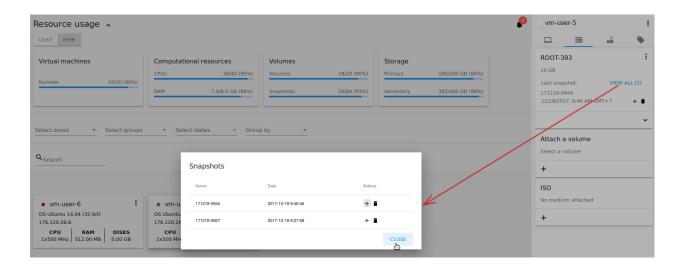


• **Delete** - allows deleting the last-taken snapshot.

Besides, you can see all the snapshots in the list by clicking the "VIEW ALL" button. In the appeared window you will see the list of all snapshots. For each snapshot in the list, the same actions are available: you can create a template, or delete a snapshot.

3. **ISO** - Allows attaching ISO.

Attach ISO by clicking the "Attach" button in the ISO card. In the dialogue window you will see the list of available ISO files. To easily find the ISO file you need, please, use the search tool above the list. Additionally, you can filter



the list by OS family(-ies), by type(-s), by group(-s). Tick the ISO file you wish in the list and click "Attach". The ISO will be attached to the VM.

You can detach the ISO file by clicking the "Detach" button.

#### **Network Tab**

Under the Network tab the network configurations of the VM are presented.

1. **NIC information** - VM network details are shown here: Network nam, Netmask, Gateway, IP, Broadcast URI, Traffic Type, Type, Default, MAC address.

You can add a secondary IP for the VM from this tab. Click "+" next to the Secondary IP option and confirm your action in the dialogue window. The IP appears for the VM.

You can delete the secondary IP by clicking the "Delete" button next to it.

2. **Firewall rules** - Allows viewing the security group assigned to the virtual machine. Click of assigned security group(-s).

You can filter the list by types and/or protocols. Or you can adjust the view by grouping the list by types and/or protocols.

In the modal window you can edit a security group. Click "Edit" to move to editing form. There you will be able to add rules, or delete the selected ones from the list.

To add rules, please, fill in the fields in the bar above the list and click "+":

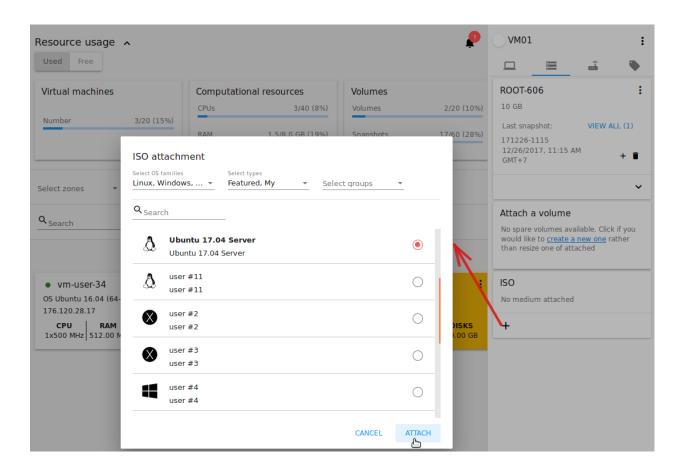
To delete rules, please, click Delete icon in the list. The rule will be deleted from the security group.

Then you can move back to the view mode, or close the window.

Please, note, when editing shared security groups, a warning message appears:

Click "Yes" if you still want to edit a shared security group. You will be moved to the "Firewall" section where you can edit the security group. After editing, go back to the virtual machine that uses this group. You will see the rules are edited.

See the *Firewall* section for more information on firewall rules in the system.



# **Tags Tab**

Under this tab you can create and see the VM tags.

CloudStack-UI uses tags very extensively to provide additional UX capabilities. Tags are key-value pairs. So it makes a kind of a key-value storage for the meta-information - VM description or group, or a user language. The tags used by Cloudstack-UI are system tags. They are prefixed with csui. You can find the full list of system tags supported by CloudStack-UI at the page.

System tags are used to provide functionality from the user interface perspective. Changing these tags affects the functionality of the application. The "Show system tags" checkbox allows to view or hide system tags of the virtual machine. Uncheck this box to hide system tags from the list. It helps to avoid accidental unwanted changes. If a user has disabled displaying of these tags, the system will remember it and next time tags will also be hidden.

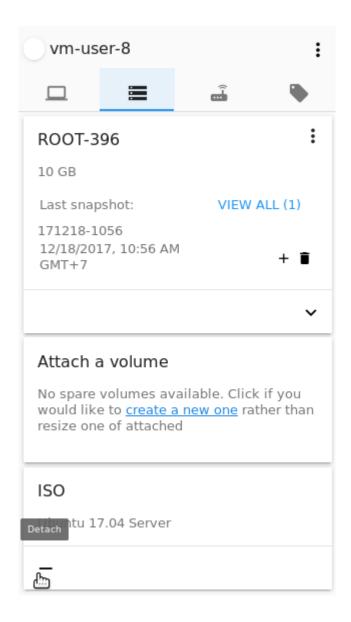
To find the tag you are interested in, please, use the search tool above the tag list. You can enter a name or a part of the tag name to distinguish it in the list.

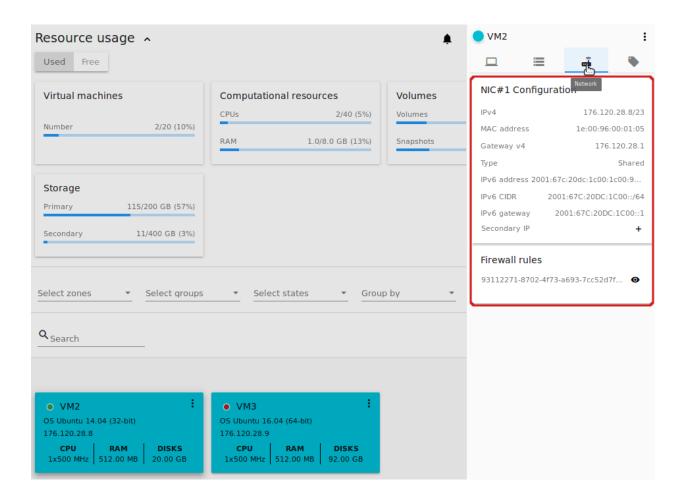
The tags assigned to the virtual machine are presented in the list. System tags are presented in one card, other tags - in a separate card. For each tag in the list the following actions are available when hovering the mouse over the tag key:

- Edit Allows editing the tag. In the appeared form define a new key and/or value (both fields are required). Click "Edit" to save the edits. Click "Cancel" to drop the edits. The tag won't be changed then.
- Delete Allows deleting the tag. Click "Delete" and confirm your action in the dialogue window.

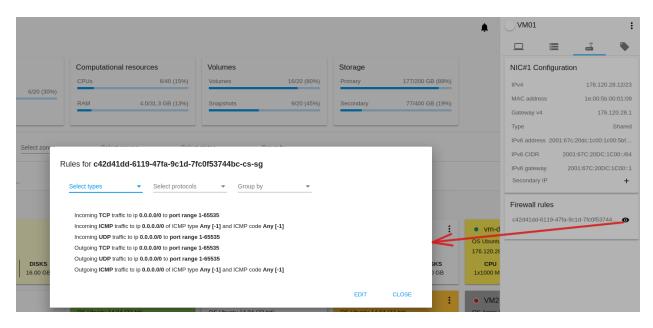
# **Create Tags**

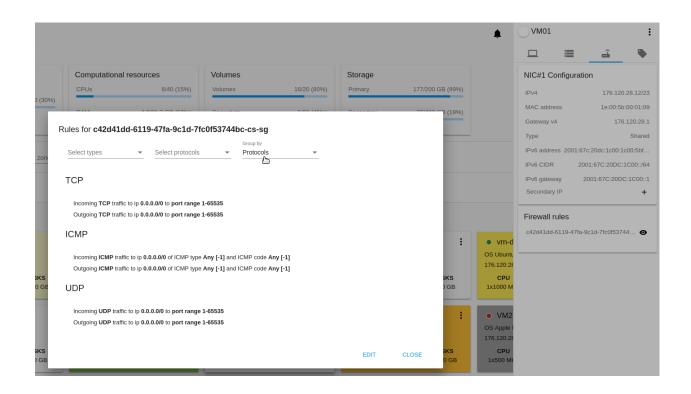
You can create a tag right from Tags tab.

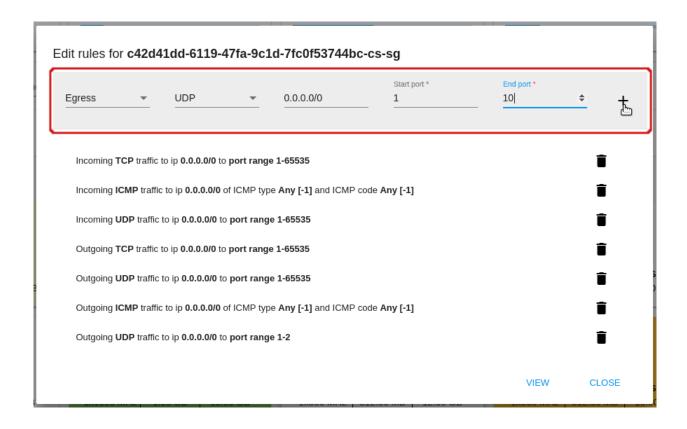


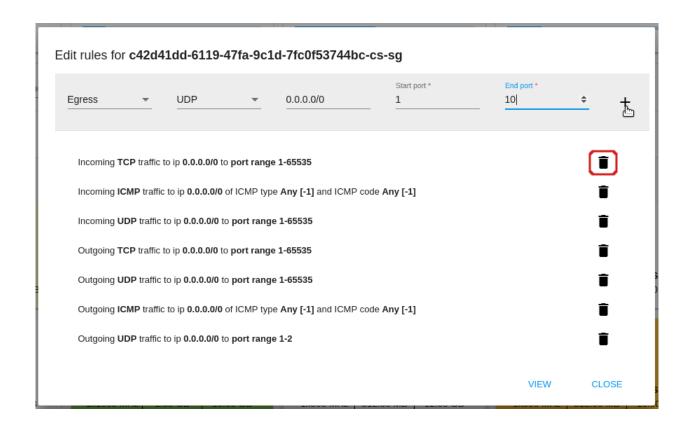


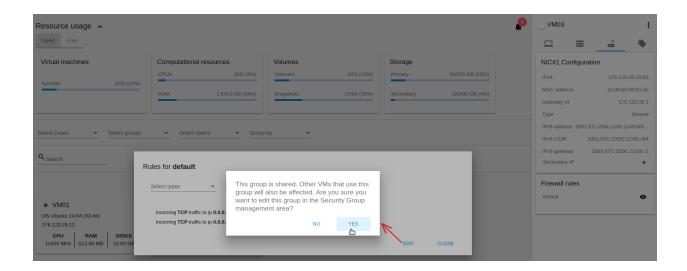


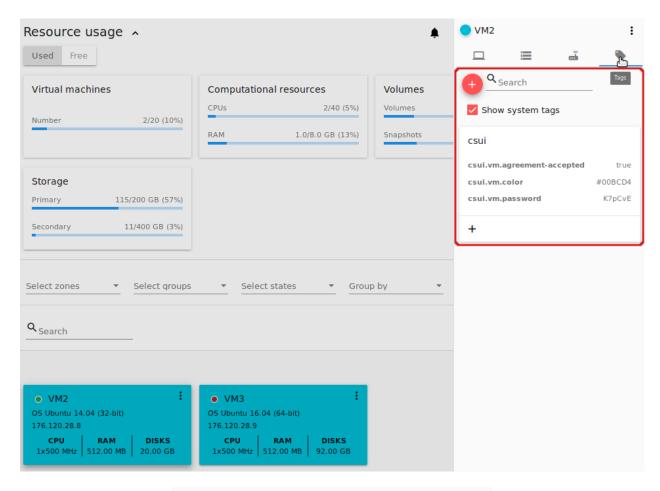


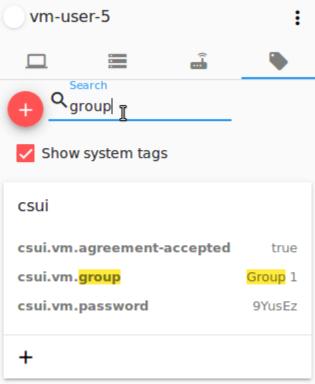


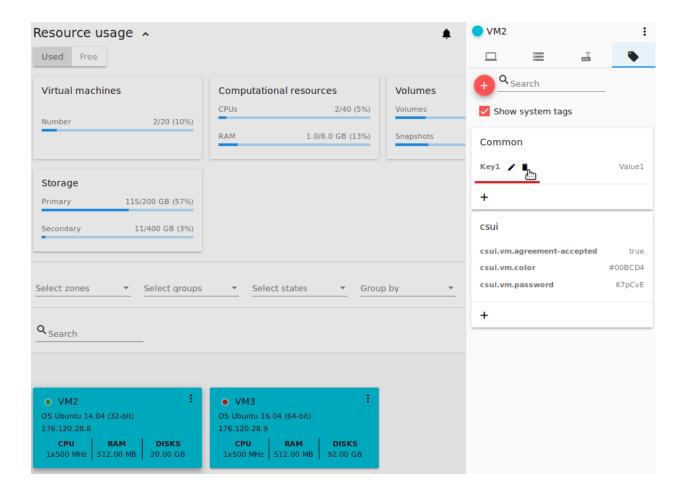








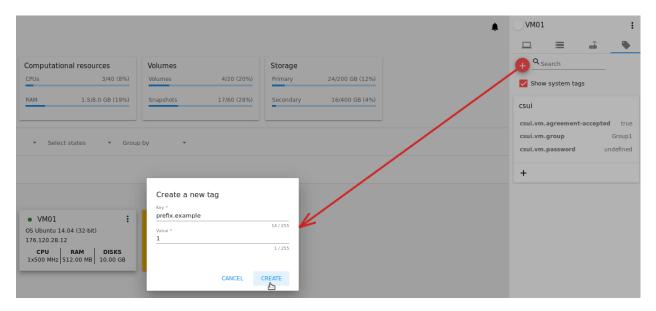




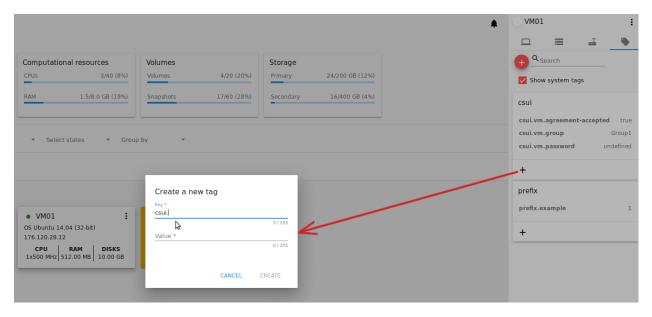


**Note:** Required fields are marked with an asterisk (\*).

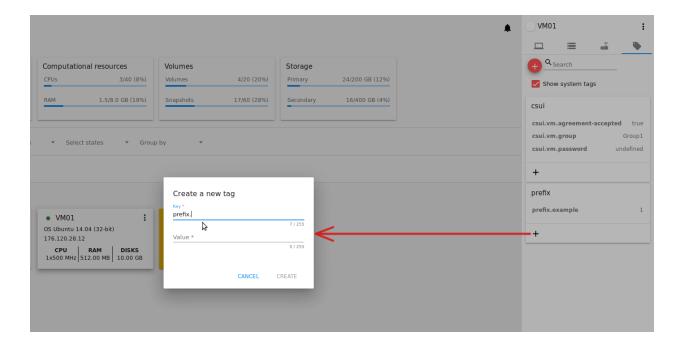
- Key \* Enter a key here.
- Value \* Enter the value here.



When adding a system tag, click "+" in the card to open the creation form. You will see that the csui prefix is automatically prepopulated here.



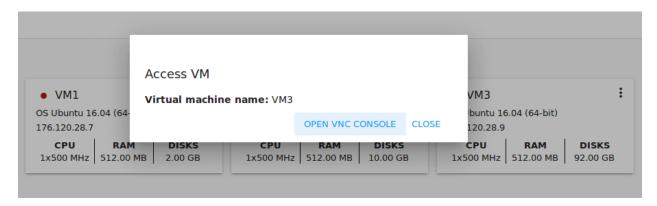
If you create a non-system tag, it will be saved in a new card. If you have entered a key in the format cprefix>. <example>, a card will be named as "cprefix>". When creating a new tag from this card, click "+" in the card and in the tag creation form the *Key* field will be prepopulated with the cprefix>.



# 2.2.5 Access a Virtual Machine

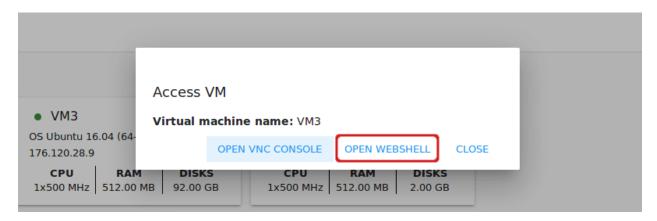
Depending on the installation source (ISO or a Template) the system allows getting an access to the VM interaction interface. Currently, the following options are supported:

• Open VNC console - This button under the "Access VM" action allows opening a console.



- WebShell if VM has a csui.vm.auth-mode tag with SSH value. To find more information on accessing VM via WebShell, please, refer to the page. See the detailed instructions on the deployment of WebShell Plugin here.
- Access via HTTP if VM has a csui.vm.auth-mode tag with HTTP value. To configure access to VM via HTTP, please, refer to page.

You can choose the way you like and make necessary settings.







In the Storage section, you can create and manage drives for virtual machines.

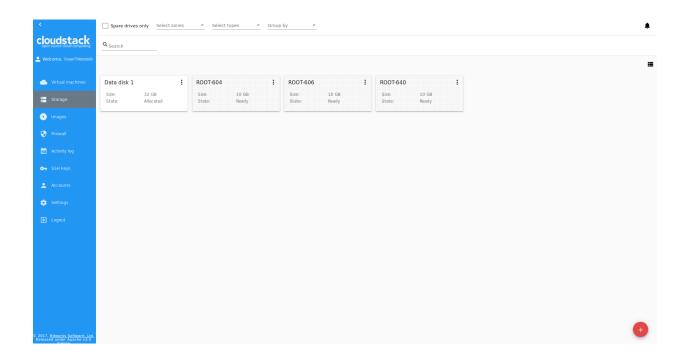
# 2.3.1 Drive list

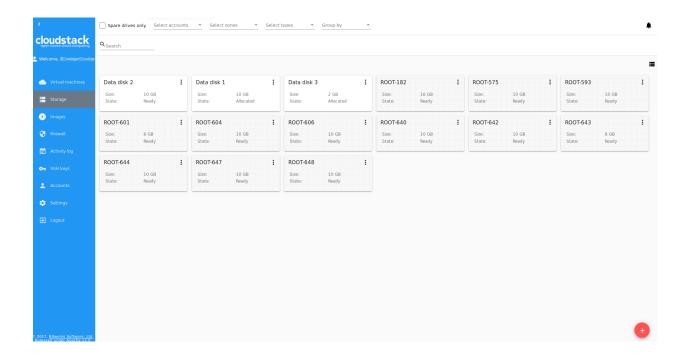
Here you can find a list of your disks existing for your user.

Domain Administrator can see disks of all accounts in the domain.

Disks can be viewed as a list or as a grid of cards. Switch the view by clicking a view icon in the upper-right corner.

**Note:** If you have just started working with CloudStack and you do not have virtual machines yet, you have no disks in the list. Once you create a VM, a root disk is created for it automatically. Creation of an additional disk takes



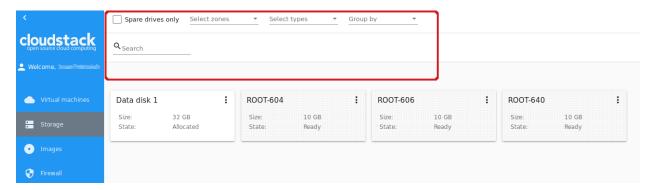


resources and requires expenses. Please, make sure you definitely need an additional data disk.

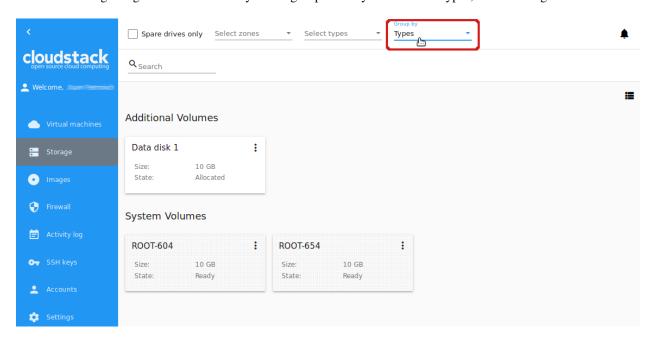
# **Filtering of Drives**

Root disks are visually distinguished from data disks in the list. There is an option to display only spare disks which allows saving user's time in certain cases.

As in all lists, there is the filtering tool for selecting drives by zones and/or types. You also can apply the search tool selecting a drive by its name or a part of the name.



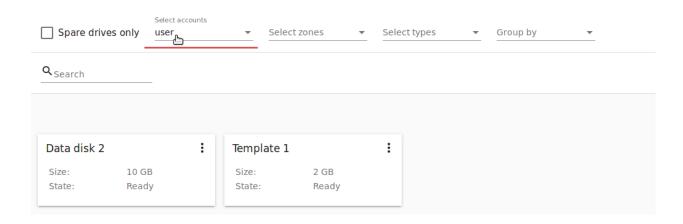
For better distinguising of drives in the list you can group them by zones and/or types, like in the figure below:



Domain Administrators can see the list of drives of all accounts in the domain. Filtering by accounts is available to Administrators.

For each drive in the list the following information is presented:

- · Drive name,
- · Size,
- State Ready or Allocated.



The Actions button is available to the right. It expands the list of actions for a disk. See the information on actions in the *Volume Action Box* section below.

## 2.3.2 Create New Volume

In the Storage section you can create new volumes.

By clicking the "Create" button in the bottom-right corner you opens a creation form.

If you have just started working with CloudStack and you do not have virtual machines yet, you have no disks in the list. Once you create a VM, a root disk is created for it automatically. Creation of an additional disk takes resources and requires expenses. Please, make sure you definitely need an additional disk. When clicking "Create", a dialogue window will ask you if you are sure you want to create a drive. Confirm your creation action by clicking "Yes":

To create a new volume fill in the fields:

- Name \* Enter a name of the volume.
- Zone \* Select a zone from the drop-down list.
- Disk offering \* Select from the drop-down list. If the selected disk offering has a custom disk size (it is set by Administrator), you can change the disk size moving the slider up to the volume size you wish.

Note: Required fields are marked with an asterisk (\*).

Click "Create" to save the settings and create the new volume. You will see the drive appears in the list.

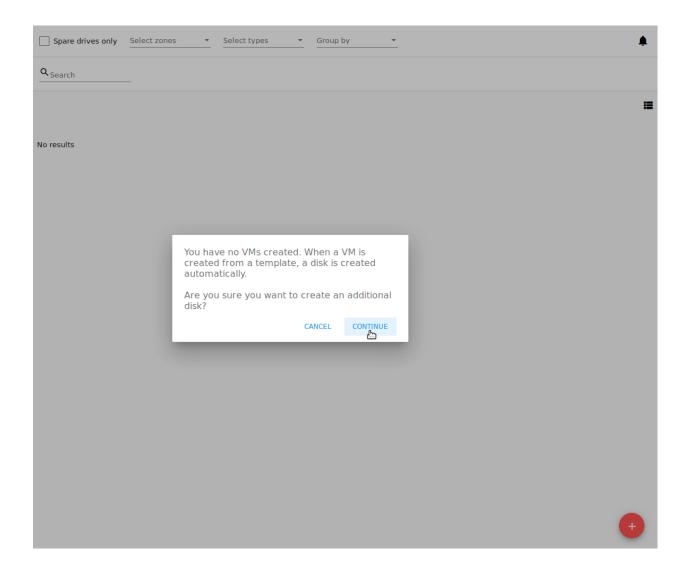
Click "Cancel" to drop all the settings. The drive will not be created then.

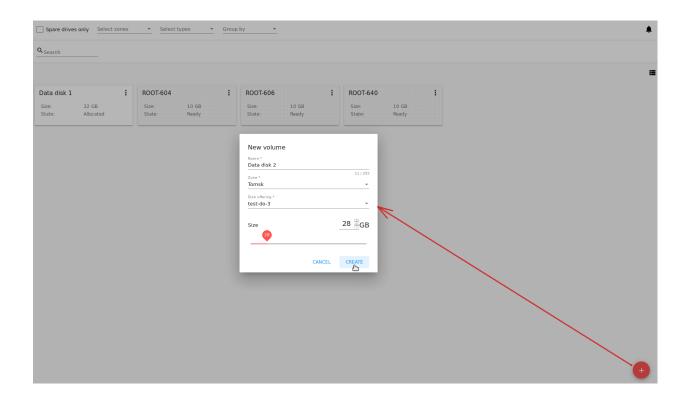
## 2.3.3 Volume Details Sidebar

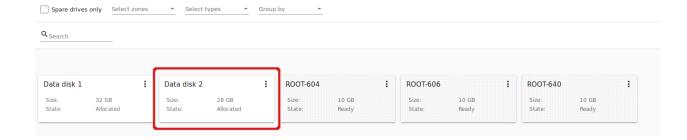
By clicking a disk in the list you can access the information on the volume.

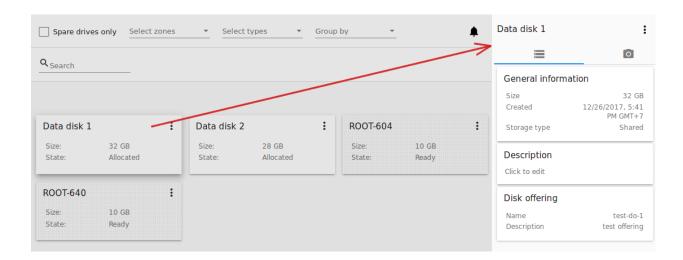
At the right sidebar you can find two tabs:

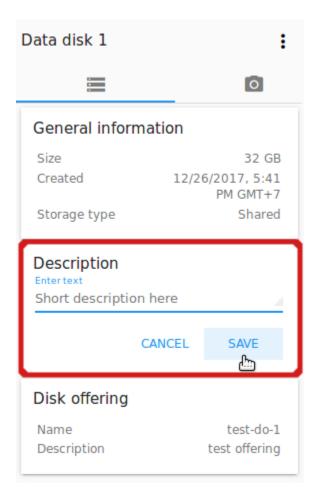
- 1. Volume tab Provides the information on the disk volume:
- General information Presents disk size, date and time of creation, the storage type (shared, local).
- Description Allows entering a short description to the drive. Click at the Description card and enter a short description in the text block.











Click "Save" to save the description.

You can edit the description by clicking the "Edit" button 
in the tab.

- Disk offering Presents the information on the disk offering chosen at disk creation.
- 2. Snapshots tab Allows creating disk snapshots. Snapshots can be taken for disks with the "Ready" status only.

Click the "Add" button and enter in the dialogue window:

- Name Define a name for the snapshot. It is auto-generated in the format <date>-<time>. But you can specify any name you wish.
- Description Add a description of the snapshot to know what it contains.

Then click "Create" and see the snapshot has appeared in the list.

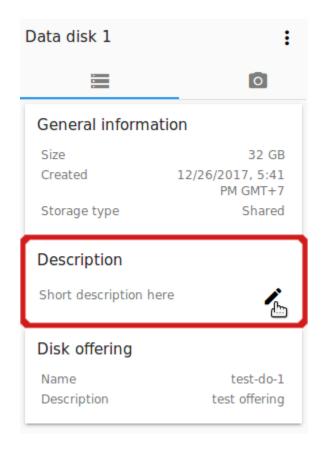
Every snapshot is saved in a separate card. There you will see the name and time of the snapshot.

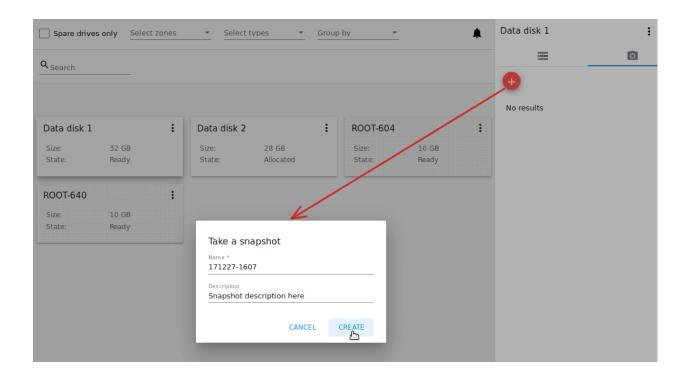
For each snapshot the list of actions is available. Find more information on snapshot actions in the *Snapshots Action Box* section below.

## **Snapshots Action Box**

Like in the Virtual Machine information tab the same actions are available for a snapshot:

• Create a template - Allows creating a template from the snapshot. This template can be used for VM creation.



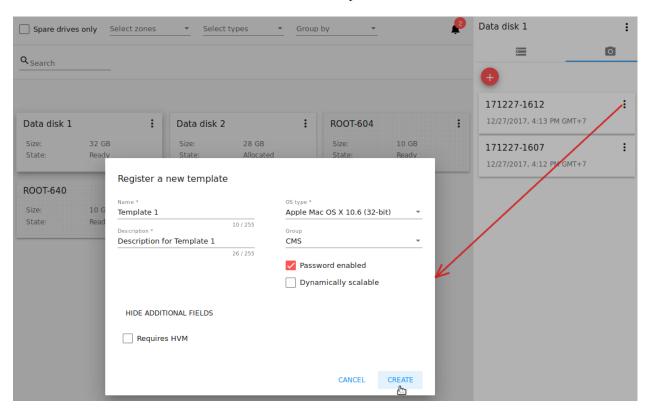


Fill in the form to register a new template:

- Name \* Enter a name of the new template.
- Description \* Provide a short description of the template.
- OS type \* Select an OS type from the drop-down list.
- Group Select a group from the drop-down list.
- Password enabled Tick this option if the template has the password change script installed.
   That means the VM created on the base of this template will be accessed by a password, and this password can be reset.
- Dynamically scalable Tick this option if the template contains XS/VM Ware tools to support the dynamic scaling of VM CPU/memory.

**Note:** Required fields are marked with an asterisk (\*).

Click "Show additional fields" to expand the list of optional settings. It allows creating a template that requires HVM. Once all fields are filled in click "Create" to create the new template.



• **Delete** - Allows deleting the snapshot.

# 2.3.4 Volume Action Box

Action on drives are available under the Actions button •

The following actions are available on disk:

For root disks:

- Take a snapshot;
- Set up snapshot schedule;
- · Resize the disk.

For data disks:

- Take a snapshot;
- Set up snapshot schedule;
- Detach;
- · Resize the disk;
- Delete.

# Take a snapshot

You can take a snapshot of the disk to preserve the data volumes. Snapshots can be taken for disks with the "Ready" status only.

Click "Take a snapshot" in the disk Actions list and in the dialogue window enter the following information:

- Name of the snapshot \* Define a name for the snapshot. It is autogenerated in the form <date>-<time>. But you can specify any name you wish.
- Description Add a description of the snapshot to know what it contains.

Note: Required fields are marked with an asterisk (\*).

All snapshots are saved in the list of snapshots. For a snapshot you can:

- Create a template;
- Delete the snapshot.

See the Snapshots Action Box section for more information.

## Set up snapshot schedule

This action is available for disks with the "Ready" status only.

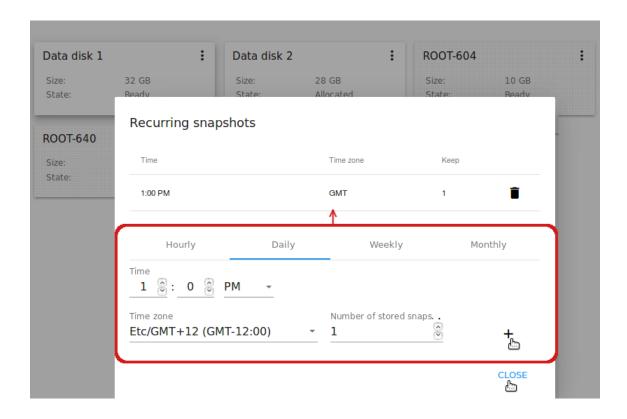
You can schedule the regular snapshotting by clicking "Set up snapshot schedule" in the Actions list.

In the appeared window set up the schedule for recurring snapshots:

- Select the frequency of snapshotting hourly, daily, weekly, monthly;
- Select a minute (for hourly scheduling), the time (for daily scheduling), the day of week (for weekly scheduling) or the day of month (for monthly scheduling) when the snapshotting is to be done;
- Select the timezone according to which the snapshotting is to be done at the specified time;
- Set the number of snapshots to be made.

Click "+" to save the schedule. You can add more than one schedule but only one per each type (hourly, daily, weekly, monthly).

# Resize the disk



**Note:** This action is available to data disks created on the base of disk offerings with a custom disk size. Disk offerings with custom disk size can be created by Root Administrators only.

You can change the disk size by selecting "Resize the disk" option in the Actions list. You are able to enlarge disk size only.

In the appeared window set up a new size and click "Resize" to save the edits.

Click "Cancel" to drop the size changes.

### Attach/Detach

This action can be applied to data disks. It allows attaching/detaching the data disk to/from the virtual machine.

Click "Attach" in the Actions list and in the dialogue window select a virtual machine to attach the disk to. Click "Attach" to perform the attachment.

An attached disk can be detached. Click "Detach" in the Actions list and confirm your action in the dialogue window. The data disk will be detached from the virtual machine.

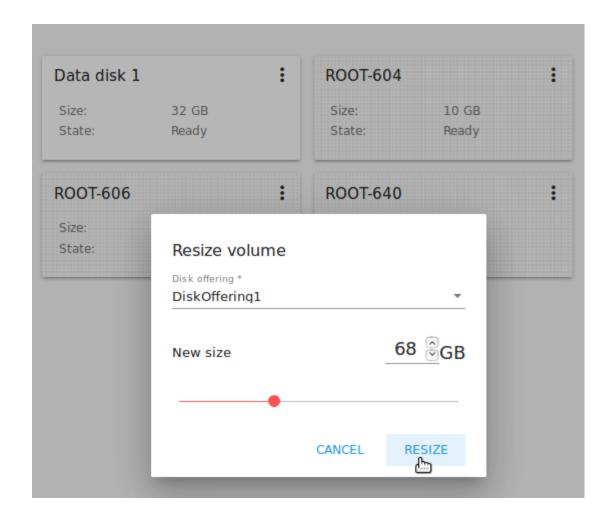
### **Delete**

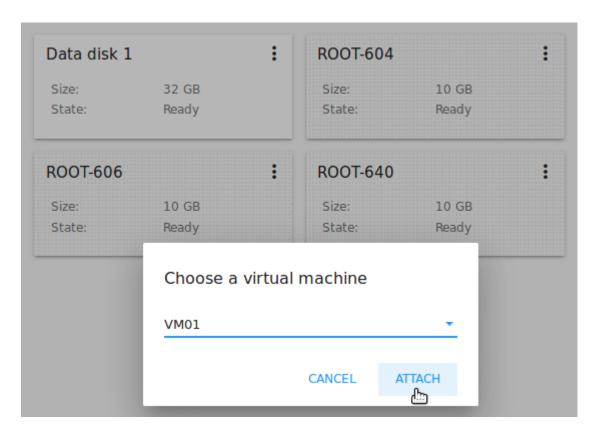
This action can be applied to data disks. It allows deleting the data disk from the system.

Click "Delete" in the Actions list and confirm your action in the dialogue window.

The data disk will be deleted from the system.

### 2.4 Images







In the Images section, you can manage Templates and ISO files that are used as installation sources for VMs.

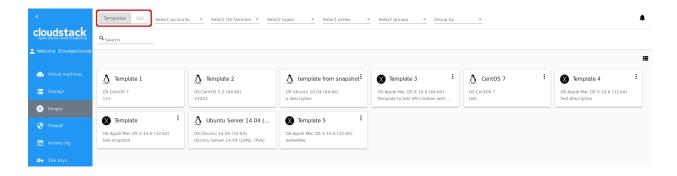
A template is a reusable configuration for virtual machines. When users create a VM, they can choose from a list of templates. Administrators and users can create new templates and add them to CloudStack.

ISO files are another installation source for virtual machines.

You can switch from Templates to ISOs by selecting a corresponding option above:

### 2.4.1 Images List

Existing templates/ISOs are presented in the list in the "Images" section. A user can see the templates/ISOs belonging to his/her user only. Domain Administrator can see templates/ISOs of all users in the domain but cannot perform actions on other users' templates.



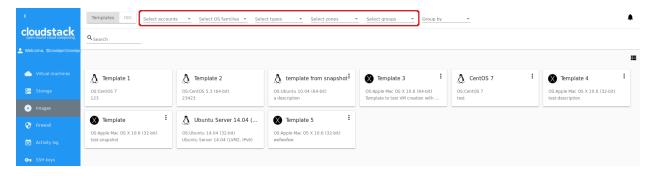
You can switch the list view of templates/ISOs to the box view using the view button in the upper-right corner.

For each template/ISO in the list, you can see its name, OS family, description. The Actions button expands the list of actions. Actions are available to those templates/ISOs that belong to your user only (corresponding to "My" type). Administrators can see templates/ISOs of all users in the domain, but cannot manage them.

### **Filtering of Images**

The list of templates/ISOs can be filtered using the filtering tool. The filtering parameters are as follows:

- Accounts (for Domain Administrators);
- · OS families;
- · Types;
- · Zones;
- Groups.

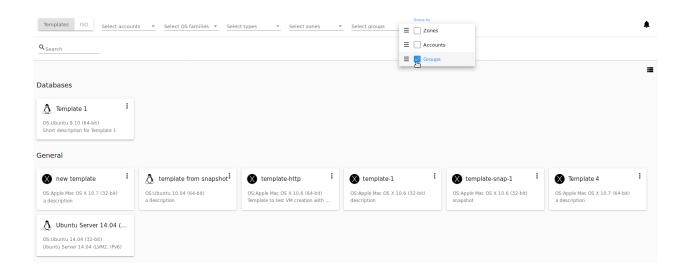


Besides, you can adjust the list view using the grouping tool. Templates/ISOs can be grouped by zones or/and groups. Administrators can group the list by accounts.

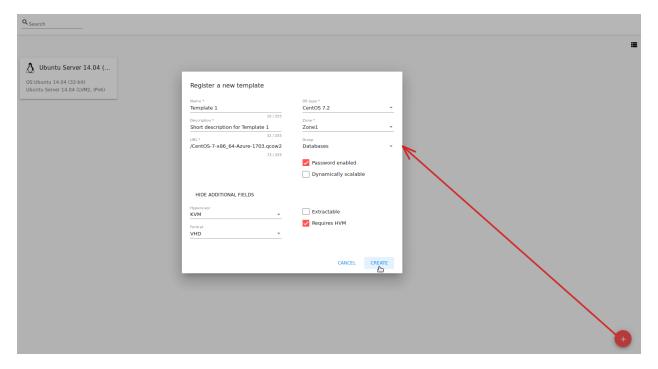
Use the search tool to easily find a template/ISO by its name or by a part of the name.

### 2.4.2 Create Template

There is a variety of ways to add more templates to the system. In the *VM Details Sidebar* section, we have described one way of template creation from a VM volume snapshot in the "Storage" tab of the VM information sidebar (see *Snapshot Action Box*). From the *Volume Details Sidebar* of the "Storage" section, you also can create a template on the base of the volume snapshot (see *Snapshots Action Box*).



One more way to create a new template is filling in the form in the *Images* section by clicking "Create" in the bottom-right corner.



It will open a creation form where you should specify the following information:

- 1. Name \* Enter a name for the new template.
- 2. Description \* Provide a short description to have a general idea about the template.
- 3. URL \* Specify a valid URL of the template file.
- 4. OS type \* This helps CloudStack and the hypervisor perform certain operations and make assumptions that improve the VM performance. Select from the drop-down list the necessary option, or select "Other" if there is no needed option in the list.
- 5. Zone \* Choose the zone where you want the template to be available.

- 6. Group Select a group from the drop-down list. The list of groups is managed by Administrator. The group assigned to a template is saved to template tags with the csui.template.group tag. The group can be edited or deleted from the *Template/ISO Details Sidebar* from the "Template" tab or by editing or deleting the corresponding tag in the "Tags" tab.
- 7. Password enabled checkbox Tick this option if your template has the CloudStack password change script installed. That means the VM created on the base of this template will be accessed by a password, and this password can be reset.
- 8. Dynamically scalable checkbox Tick this option if the template contains XS/VM Ware tools to support dynamic scaling of VM CPU/memory.

**Note:** Required fields are marked with an asterisk (\*).

- 9. "Show additional fields" allows expanding the form and set more settings:
  - Hypervisor Select a hypervisor from the drop-down list.
  - Format The format of the template upload file, e.g. VHD or RAW or VMDK.
  - Extractable Tick this option if the template is available for extraction. If this option is selected, end-users can download a full image of a template.
  - Requires HVM Tick this option for creating a template that requires HVM.

Once all fields are filled in, click "Create" to create the template with these settings. The created template will appear in the list.

Click "Cancel" to close the form without template creation. All fields will be cleared.

### 2.4.3 Create ISO

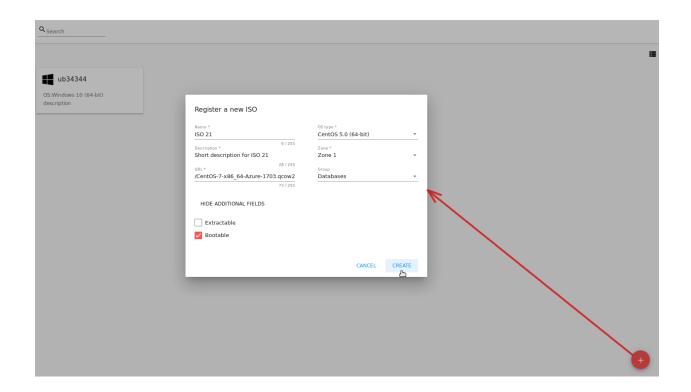
You can create a new ISO file in the *Images* section by clicking "Create" in the bottom-right corner.

It will open a creation form where you should specify the following information:

- 1. Name \* Enter a name for the new ISO file.
- 2. Description \* Provide a short description to have a general idea about the ISO file.
- 3. URL \* Specify a valid URL of the ISO file.
- 4. OS type \* This helps CloudStack and the hypervisor perform certain operations and make assumptions that improve the VM performance. Select from the drop-down list the necessary option, or select "Other" if there is no needed option in the list.
- 5. Zone \* Choose the zone where you want the ISO file to be available.
- 6. Group Select a group from the drop-down list. The list of groups is managed by Administrator. The group assigned to ISO is saved to ISO tags with the csui.template.group tag. The group can be edited or deleted from the *Template/ISO Details Sidebar* from the "Template" tab or by editing or deleting the corresponding tag in the "Tags" tab.

**Note:** Required fields are marked with an asterisk (\*).

7. "Show additional fields" allows expanding the form and set more settings:



- Extractable Tick this option if the ISO file is available for extraction. If this option is selected, end-users can download a full image of an ISO file.
- Bootable Tick this option to indicate whether the machine can be booted using this ISO.

Once all fields are filled in, click "Create" to create the ISO file with these settings. The created ISO file will appear in the list.

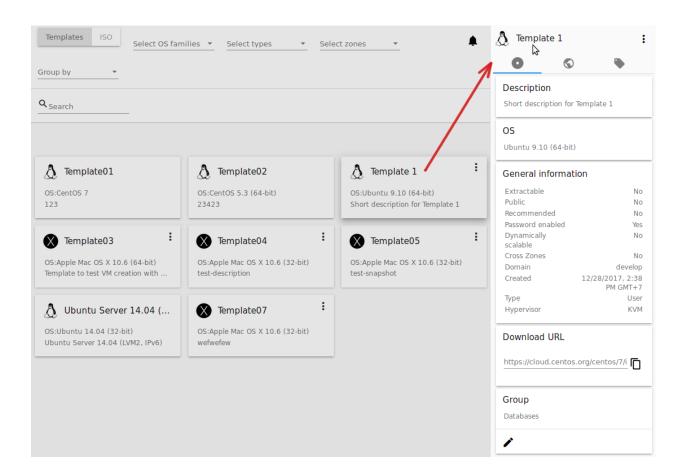
Click "Cancel" to close the form without ISO creation. All fields will be cleared.

The created ISO will appear in the list.

### 2.4.4 Template/ISO Details Sidebar

The information on each template/ISO is presented in the sidebar to the right. It is opened by clicking the template/ISO card or line in the list. The information is presented here in 3 tabs. Above the tabs you can see the template/ISO general information:

- Name Template/ISO name and symbol,
- Actions button Actions list allowing the Delete action.
- 1. Template tab:
  - Description Template/ISO description provided at its creation.
  - OS The OS selected for this template/ISO.
  - General Information The settings saved for this template/ISO: size, creation date, type, hypervisor, other settings.
  - URL The URL provided for this template/ISO. Next to it you can see the "Copy" icon copy the URL to clipboard and then paste it in the address line.



• Group - Template/ISO group. You can change the group by clicking "Edit" . Choose an existing group in the appeared window and click "ASSIGN" to assign the template/ISO to the selected group.

From this window, you can remove the template/ISO from the group. Select the "Remove from the group <group name>" option and click "REMOVE".

- 2. Zones tab Shows the zone where the template/ISO is available. If the zone has "Yes" for the *Ready* status, the template/ISO can be used for VM creation.
- 3. Tags tab Presents the list of tags assigned to the template/ISO.

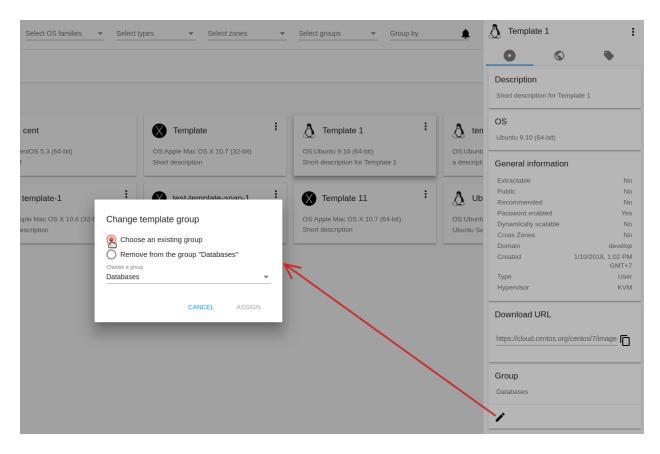
Tags can be system or non-system. System tags are used to provide the functionality from the user interface perspective. Changing these tags affects the functionality of the application. The "Show system tags" checkbox allows to view or hide system tags of the template. Hiding system tags helps to avoid accidental unwanted changes. If a user has disabled displaying of these tags, the system will remember it and next time tags will also be hidden. Uncheck the "Show system tags" checkbox to hide system tags from the list.

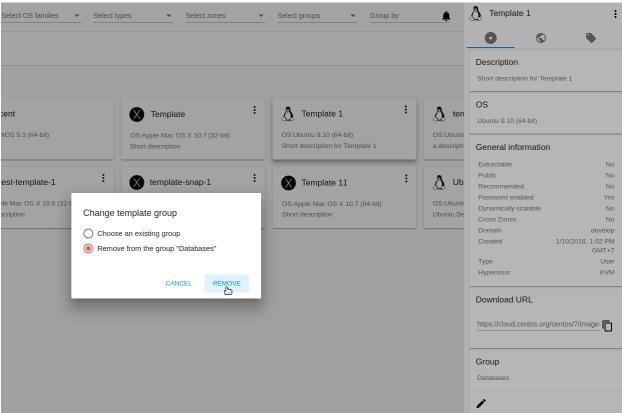
The following system tags can be used for templates/ISOs:

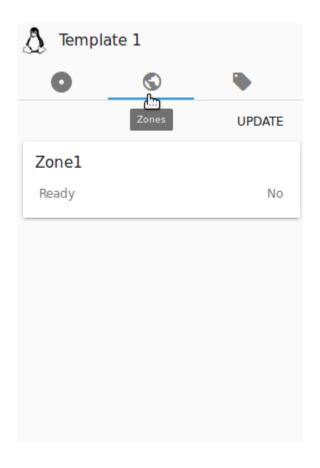
- csui.template.group Used to assign a template/ISO to a group.
- csui.template.download-url Used for URL, if any provided for the template/ISO.

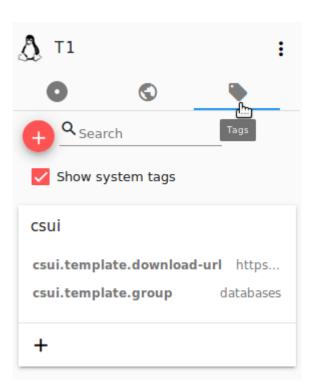
Note: Please, see the list of tags to find system tags that can be used for a template/ISO.

To find the tag you are interested in, please, use the search tool above the tag list. You can enter a name or a part of the tag name to distinguish it in the list.







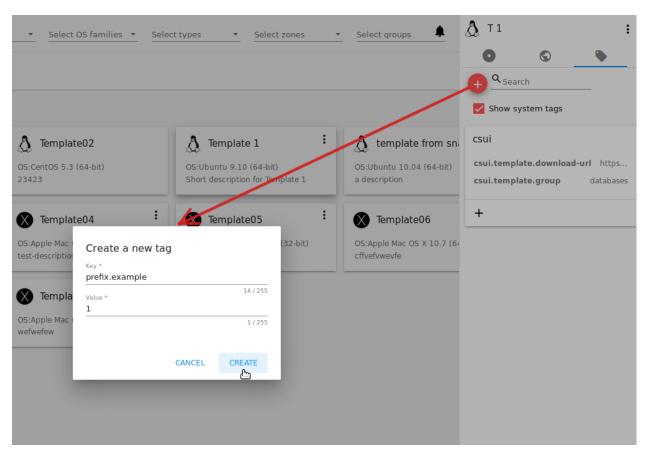


To add a tag for the template/ISO click "Create" . In the appeared form enter:

- Key \*
- Value \*

Note: Required fields are marked with an asterisk (\*).

Click "Create" to assign a new tag to the template/ISO.



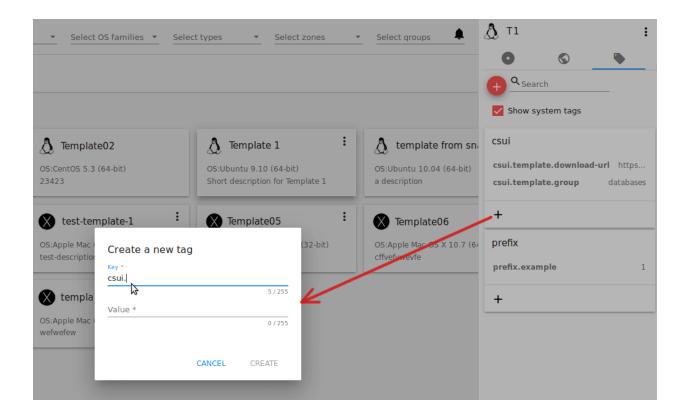
When adding a system tag, click "+" in the card to open the creation form. You will see that the csui prefix is automatically prepopulated here.

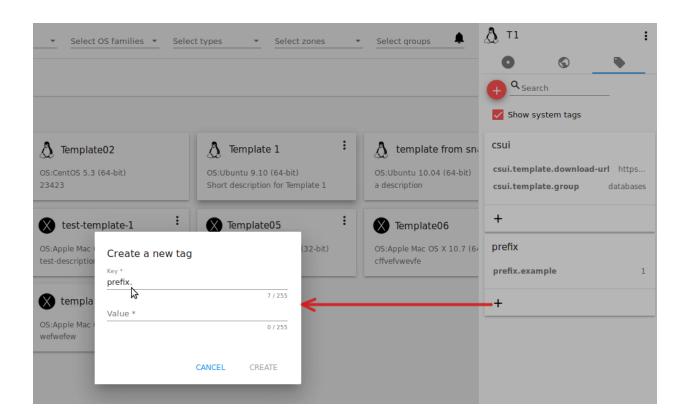
If you create a non-system tag, it will be saved in a new card. If you have entered a key in the format cprefix>.. <example>, a card will be named as "cprefix>". When creating a new tag from this card, click "+" in the card and in the tag creation form the *Key* field will be prepopulated with the cprefix>.

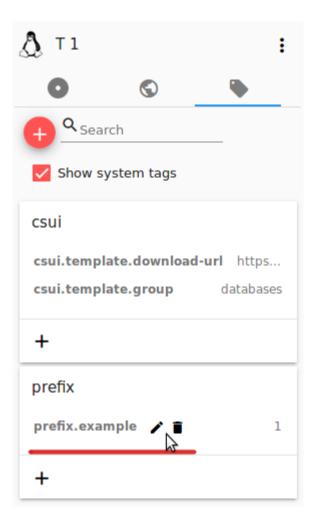
Tags can be edited or/and deleted. Mouse over the tag in the list and see "Edit" and "Delete" buttons.

Click "Edit" to change the tag's key or value in the appeared form. Save the edits.

Click "Delete" to delete the tag from the list for this template. Confirm your action in the dialogue window. Make sure the tag disappeared from the list of assigned tags.

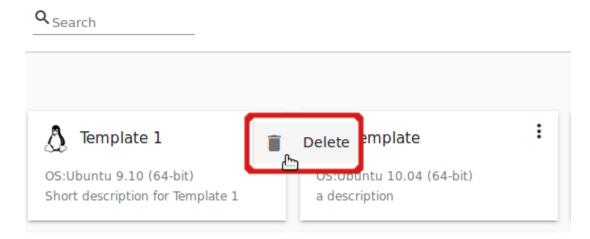






### 2.4.5 Template/ISO Action Box

By clicking "Actions" you can expand the list of actions for those templates/ISO that belong to your user only (corresponding to "My" type). The deleting action is available here.



Click "Delete" to delete the template/ISO and then confirm your action in the dialogue window. The template/ISO will be deleted.

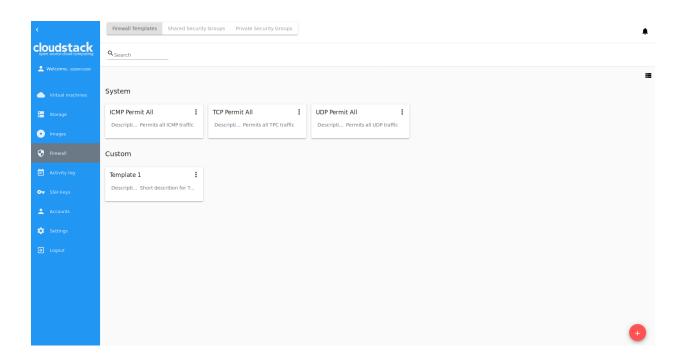
Click "Cancel" to close the window without deleting a template/ISO.

### 2.5 Firewall

# Contents • Firewall - Firewall List - Create a Security Group Template - Create a Shared Security Group - Private Security Groups - Security Group Details Sidebar - Security Group Action Box \* Edit a Firewall Template/Security Group

The *Firewall* section contains templates to create a security group for a virtual machine and shared security groups used for virtual machines of other users.

**Firewall templates** are presets of rules that can be system or developed by a user (custom). Administrators can specify default presets during the interface deployment in the JSON configuration file (find more in Configurations Guide). Now there are "TCP Permit All", "UDP Permit All", "ICMP Permit All" system firewall templates in the system. They just pass all the traffic. We offer them because we would like a user to make his virtual machines accessible without diving into technical details. If it is necessary, a custom firewall template can be created. Find more information on how to create a custom firewall template at *Create a Security Group Template*.



Upon VM creation the system creates a new security group for a VM on the base of templates. This group is initially filled with all the rules from specified presets. Next, when the user changes the rules for a certain virtual machine, it does not affect other machines. These changed rules make a **private security group** used for that virtual machine only.

The second way is to use a **shared security group** for your virtual machine. Shared groups are used by other VMs. Changes of rules in them may affect other VMs.

Users can manage security group rules in two modes: a "view" mode with filtering by types and protocols and an "edit" mode. Security groups editing is available when switching from "view" mode to "editing" mode. If the group is shared, the user is warned that changes will affect other VMs using this group. This behavior allows avoiding undesirable changes for other VMs.

Templates, shared and private security groups are placed in different tabs of the *Firewall* section. You can switch from templates to shared or private security groups using the tool above the list.

A user can see security groups of his/her user only. An Administrator can observe security groups of all accounts in the domain.

### 2.5.1 Firewall List

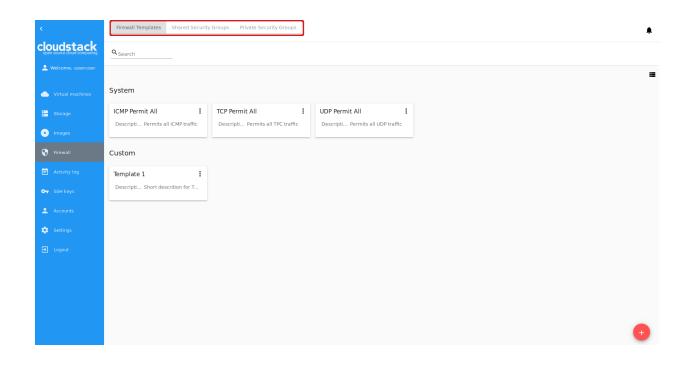
The security groups are presented in a list format. You can change the view from list to cards clicking the switch view icon in the upper-right corner.

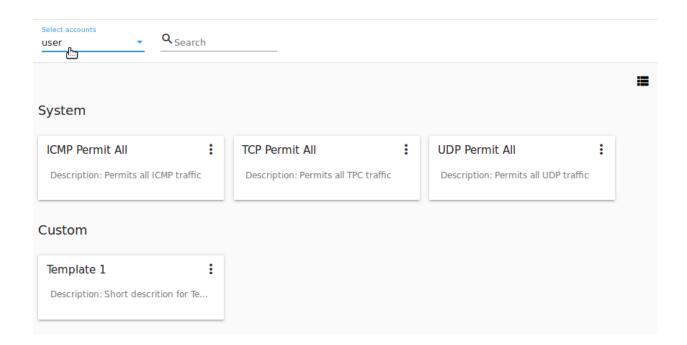
To quickly find the security group you need, please, use the search tool above the list. Enter a name or a part of the name of the template/security group and see the immediate result.

Administrators can filter the list of templates/shared groups by accounts.

### 2.5.2 Create a Security Group Template

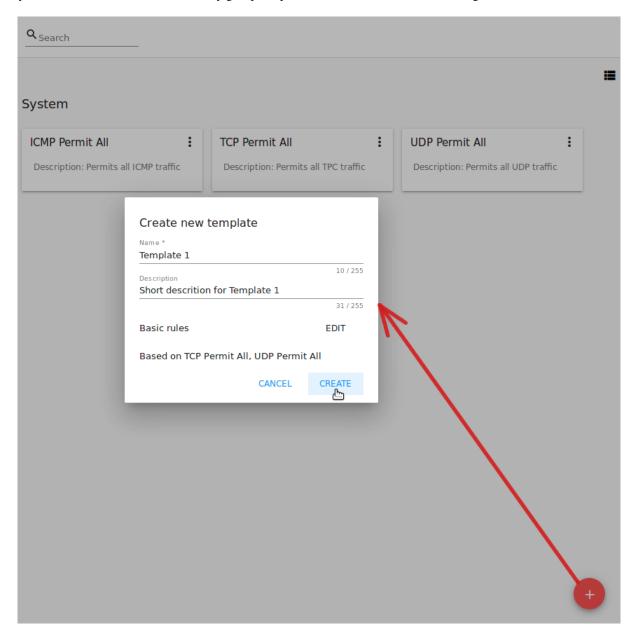
You can create your own template. It will be available as a base at a new private security group creation for VM.





A new security group template is created on the base of existing templates. This security group will be created as a custom template (with a custom-template type).

If you would like to create a new security group template, click "Create" in the bottom-right corner and fill in the form:

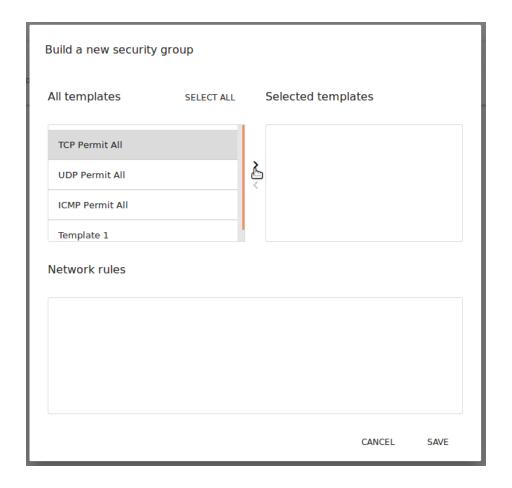


- Name \* Enter a name for the template.
- Description Provide a short description for the firewall template.
- Basic rules Click "ADD" to open the list of rules to assign them to the template. In the appeared window select a template in the "All templates" list at the left and move it to the "Selected templates" list at the right by clicking the arrow icon:

Click "SELECT ALL" to move all templates from left to right at once.

Click "RESET" to drop all selected templates.

In the list below you will see the rules corresponding to the selected templates. All of them are checked as selected.



Build a new security group

All templates SELECT ALL Selected templates RESET

UDP Permit All

ICMP Permit All

Template 1

Network rules

Incoming TCP traffic to ip 0.0.0.0/0 to port range 1-65535

Outgoing TCP traffic to ip 0.0.0.0/0 to port range 1-65535

Uncheck those you do not wish to add to your firewall template.

Click "SAVE" to apply the selected rules to your security group template.

Click "CANCEL" to drop the selected options. No rules will be assigned to the template. You will return to the "Create a new security group" window.

When all fields are completed, click "CREATE" to create the new firewall template. The template will appear in the list of firewall templates as *Custom*:

Click "CANCEL" to cancel the template creation process. No firewall templates will be created then. All fields will be cleared in the form.

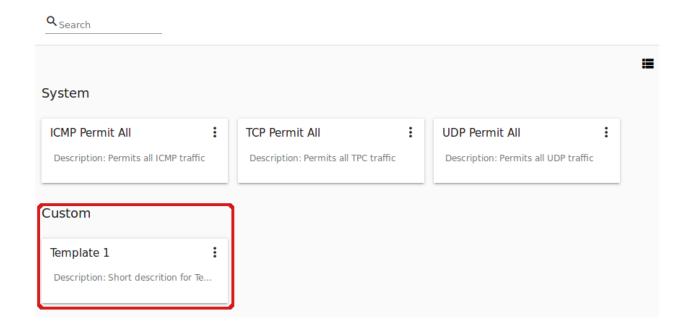
### 2.5.3 Create a Shared Security Group

You can create a shared security group and it will be available for creating virtual machines of other users.

A new shared security group is created on the base of existing templates. This security group will be created with a shared type.

If you would like to create a new shared security group, click "Create" in the bottom-right corner and fill in the form:

- Name \* Enter a name for the group.
- Description Provide a short description for the group.



• Basic rules - Click "ADD" to open the list of rules to assign them to the group. In the appeared window select a template in the "All templates" list at the left and move it to the "Selected templates" list at the right by clicking the arrow icon:

Click "SELECT ALL" to move all templates from left to right at once.

Click "RESET" to drop all selected templates.

In the list below you will see the rules corresponding to the selected templates. All of them are checked as selected. Uncheck those you do not wish to add to your shared security group.

Click "SAVE" to apply the selected rules to your security group template.

Click "CANCEL" to drop the selected options. No rules will be assigned to the security group. You will return to the "Create a new security group" window.

Click "CREATE" to create the new shared security group. The group will appear in the list of shared security groups.

Click "CANCEL" to cancel the group creation process. No group will be created then. All fields will be cleared in the form.

### 2.5.4 Private Security Groups

Private security groups are listed in the Private Security Groups section.

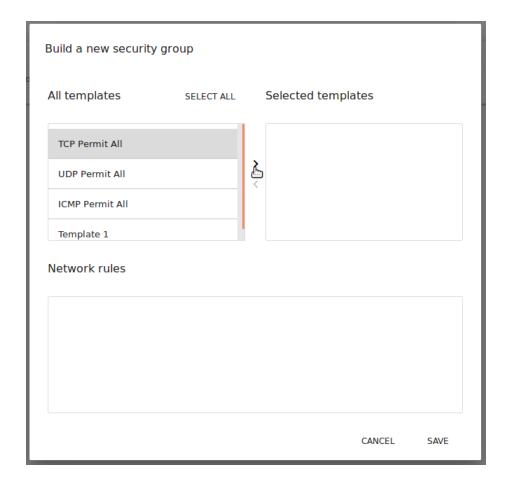
Security groups appear in this section once they are created for a virtual machine (see Create a Virtual Machine).

You can quickly find a group by its name or a part of the name using the searching tool above the list.

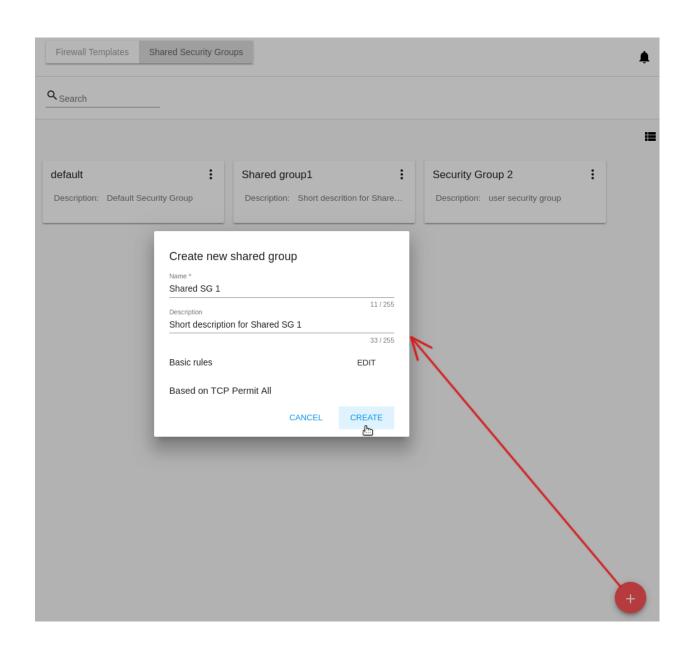
Besides, Administrators can filter the list by accounts.

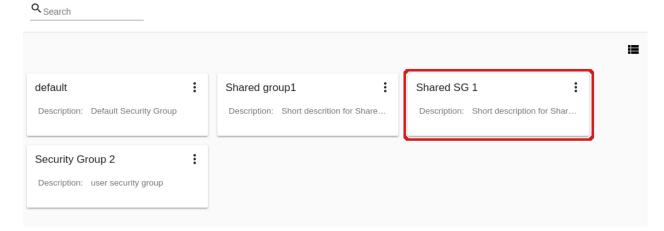
You can filter the list by ticking the "Orphan" checkbox above. It allows displaying only the security groups that are not used by any machine.

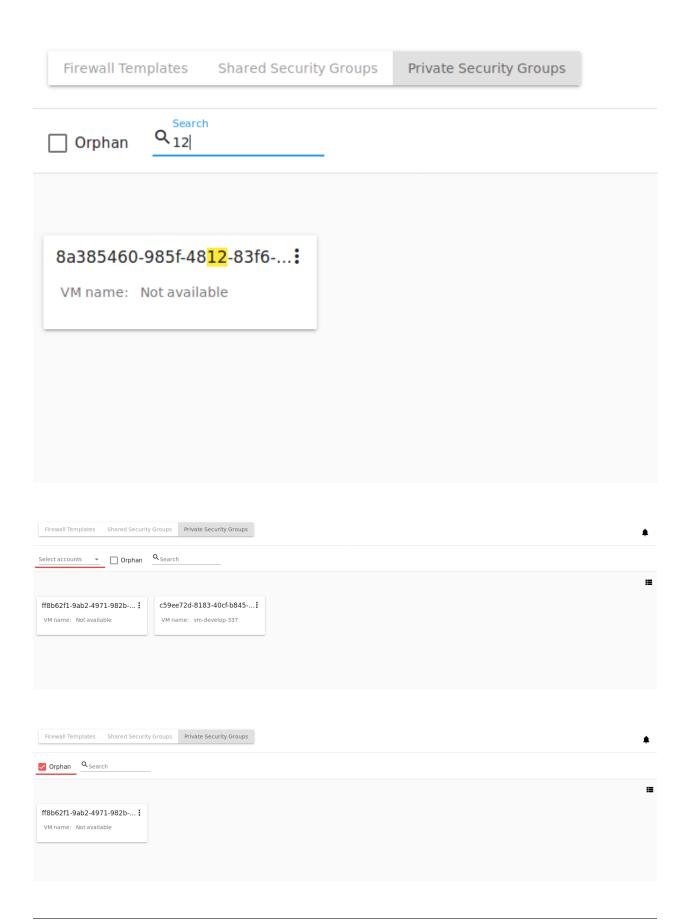
The "Orphan" option appears above the list in case the security groups that are not used by any VM exist in the list. This might happen in case a VM has been deleted but a group has been not (because of an error or incorrect behavior).









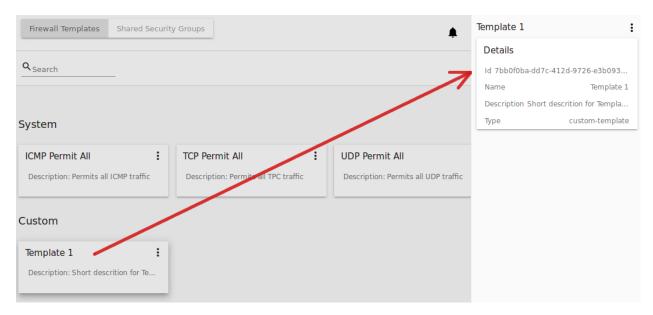


### 2.5.5 Security Group Details Sidebar

You can see the firewall rules details in the sidebar to the right.

Click the template/shared/private security group in the list and open the sidebar. You will see the information there:

- Name of the security group;
- Security Group Action Box under ;
- ID of the security group;
- Description giving an idea what the security group contains (not available for private security groups);
- Type Defines the security group types. For firewall templates it can be custom—template for custom templates, or predefined—template for system templates. For shared security groups it is shared. For privat security groups you will see private.



For shared security groups you also can see what virtual machines this group is assigned to. The machine name in the list is active. You can move to the virtual machine details bar by clicking it.

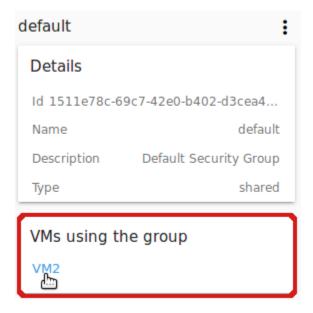
For privat security groups a VM name is also displayed in the details sidebar, but it is not active.

### 2.5.6 Security Group Action Box

Firewall templates, shared and private security groups have an Action box with the following actions in it:

- View Allows viewing the rules in the group/template. Click "Rules" to open the rules implemented to the template.
- Delete Allows deleting the group or the template from the system.

**Note:** A template/security group cannot be deleted if it is used for a virtual machine, or it belongs to another user. Deleting action is not available for system firewall templates.



### **Edit a Firewall Template/Security Group**

When clicking "Rules" • in the Action box you open a modal window where the rules of the template/security group are listed. The list of rules can be filtered by:

- Types Ingress and/or Egress;
- Protocols TCP and/or UDP and/or ICMP;

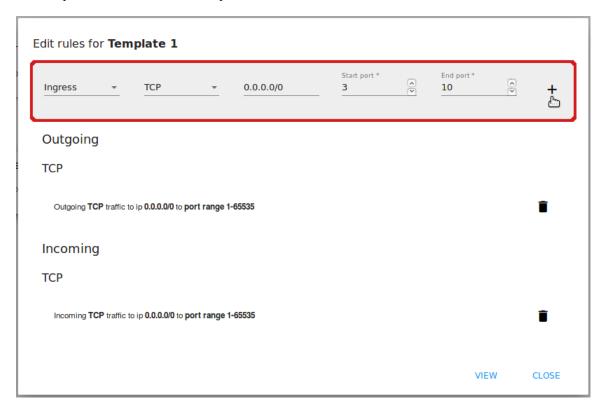
Besides, you can group the rules by types and/or protocols.



You can edit the implemented rules right in this modal window by clicking "EDIT" below the list. When switching to

the edit mode you are enabled to add rules or delete the selected ones from the list.

To add rules, please, fill in the fields in the panel above the list and click "+":



To delete rules, please, click the Delete icon in the list. The rule will be deleted from the security group.

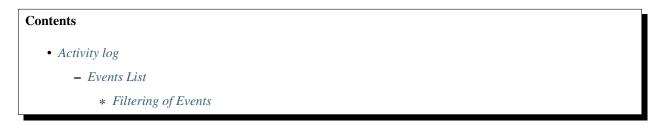
Then you can move back to the view mode, or close the window. You will see the rules are edited.

Please, note, when editing shared security groups, a warning message appears:

Click "Yes" if you still want to edit a shared security group. You will be switched to the "Edit" mode. Change the security group as you need following the instructions above.

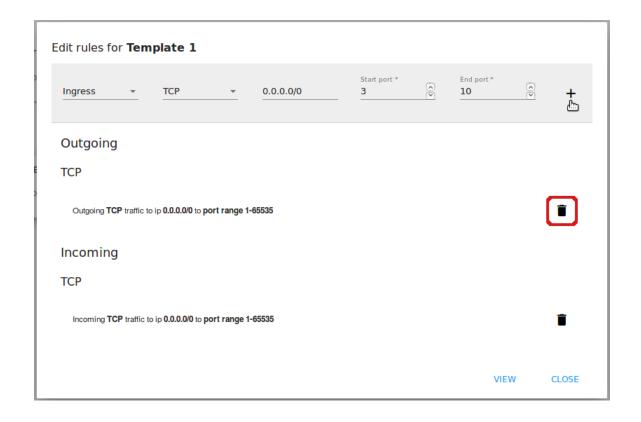
**Note:** Editing is not available for system firewall templates and security groups of other users. You can view the rules only.

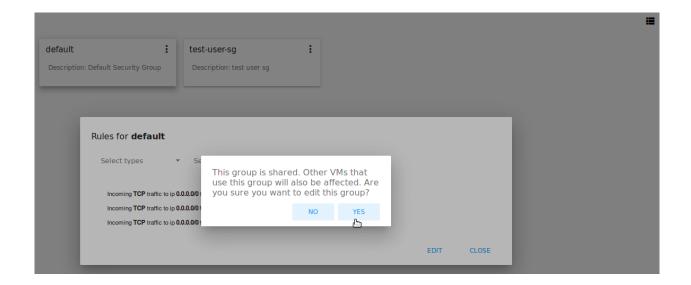
### 2.6 Activity log



In the *Activity log* section you can see user activity in the account. Event search by main parameters - date and keywords - is supported to make it easier to find a necessary event for a specific date or type.

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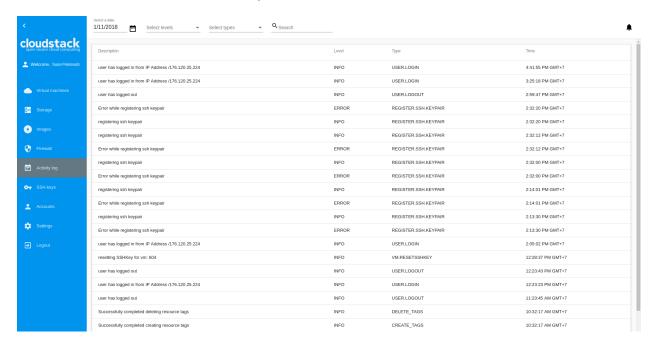




### 2.6.1 Events List

Events in the Activity log are listed in a chronological order from the latest till the earliest. It represents the full list of events for a selected day.

A user can view activities for his/her user only. An Administrator can see events for all accounts in the domain.



The following information for each event is presented in the list:

- Event description.
- Level A kind of a category the event belongs to. It can show:
  - INFO For regular activities, for example, logging in, creating a VM, attaching a disk.
  - WARN For any warnings occurred.
  - ERROR For any errors occurred, for example, an error while registering an SSH key pair.
- Type Displays in what aspect of the system the event has taken place, for example: USER.LOGIN for events happened at user authentication to the system; VOLUME.RESIZE for events at disk size change.
- Time of the event.

### **Filtering of Events**

To easily find an event in the list use the filtering tool above.

Any user can filter events by:

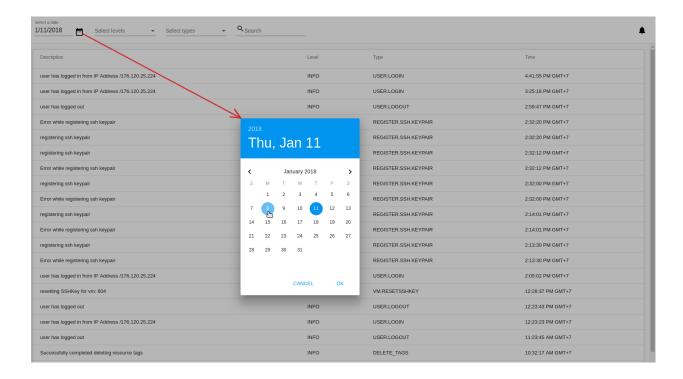
• Date - Allows selecting events for a specific date. By default, the today's date is selected. Click and in the appeared calendar change the date for the day you wish to see activities for.

Click "OK" to filter the list. The events will be selected in accordance with the chosen date.

Click "CANCEL" to drop the selection.

-Levels - Allows selecting events by levels. Choose the level/levels you with from the drop-down list.

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-Types - Allows selecting events by types. Choose the type/types from the drop-down list.

An Administrator has an additional filtering parameter - accounts.

Use the search tool to find an event by keywords or a part of a word.

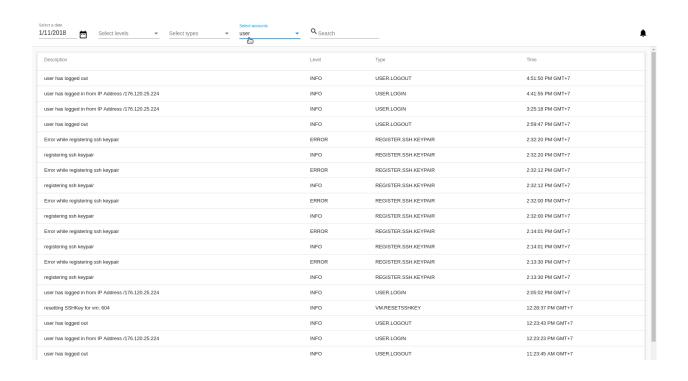
### 2.7 SSH Keys

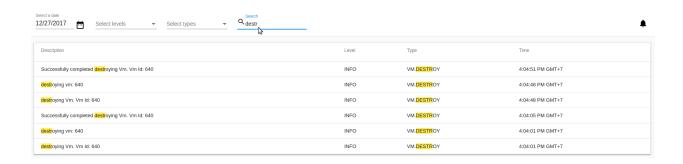
## Contents • SSH Keys - SSH Key List \* Filtering of SSH Keys - Create an SSH Key - SSH Key Details Sidebar - SSH Key Action Box

In the SSH keys section you can create and manage SSH keys.

In addition to the username and password authentication, CloudStack supports using SSH keys to log in to the cloud infrastructure for additional security. Find more information in the official documentation.

CloudStack-UI allows managing SSH key in a separate section which is more convenient for a user.

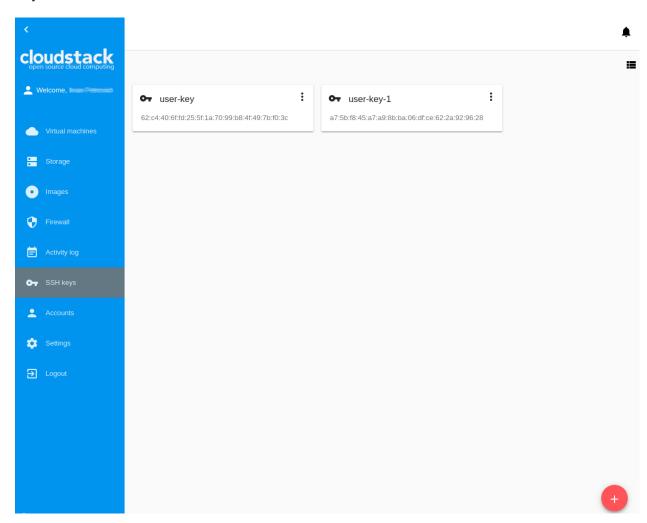




2.7. SSH Keys 99

### 2.7.1 SSH Key List

SSH keys existing in the account are presented in this section. A user can see and manage SSH keys for his/her user only.



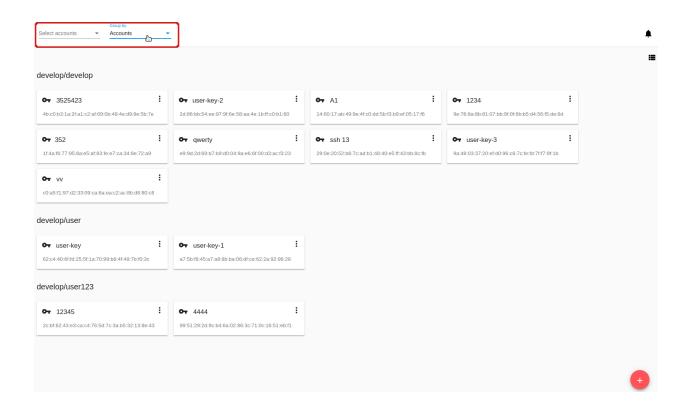
Administrators can see and manage keys for all accounts in the domain.

You can switch the view from a list mode to a card mode using the switch tool in the upper-right corner. For every key the following information is displayed:

- Key name;
- SSH public key;
- Action box Allows deleting a key from the system.

### Filtering of SSH Keys

The filtering tool is available to Administrators. It is placed above the list of keys and allows filtering keys by accounts. Besides, the keys can be grouped by accounts that may be convenient for list viewing.



### 2.7.2 Create an SSH Key

You can generate a new SSH key to use for authentication.

By clicking "Create" in the bottom-right corner you will open a form where you should specify a key name:

Then click "CREATE". The SSH key will be auto-generated. The public key will appear in the list of SSH keys with a fingerprint. In the modal window, you will see the private key. This private key is not saved in the system. You should save it for yourself. Click "COPY" to correctly copy it and save it locally.

Then click "OK" to close the window.

You can specify an SSH public key entering its value in the field. It should start from ssh-rsa followed by one space and at least one symbol. Then click "CREATE". The key will be saved. No private key is required in this case.

The created SSH key is available to assign to VMs now.

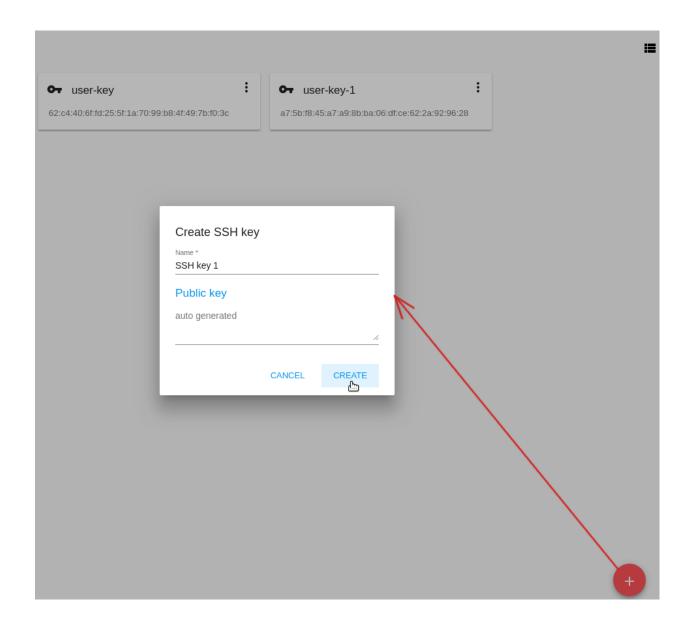
### 2.7.3 SSH Key Details Sidebar

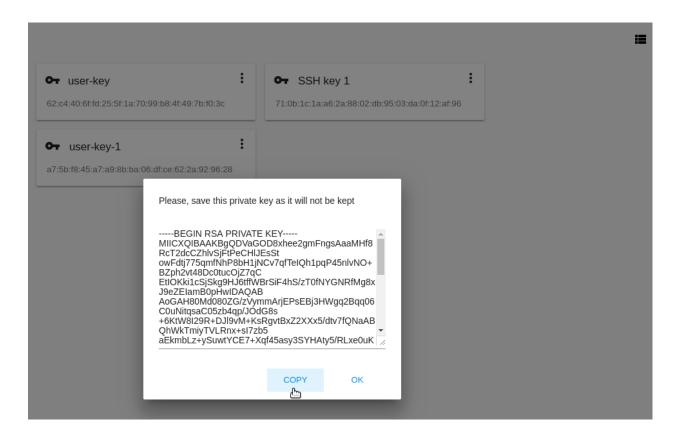
By clicking an SSH key in the list you will open a details sidebar to the right.

It contains the following information:

- · SSH key name;
- Key action box allowing key deleting;
- SSH public key fingerprint;
- SSH key description In this block a description can be added to understand better what this key is for. Click the block and enter a short description in the text field. Then click "SAVE" to save it.

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Click "CANCEL" to drop adding a description.

You can edit the description of an SSH key by clicking . Change the existing description in the text field and save the edits.

The description is saved to account tags if they are supported for the account. Account tags can be switched on in the configuration file by an Administrator.

### 2.7.4 SSH Key Action Box

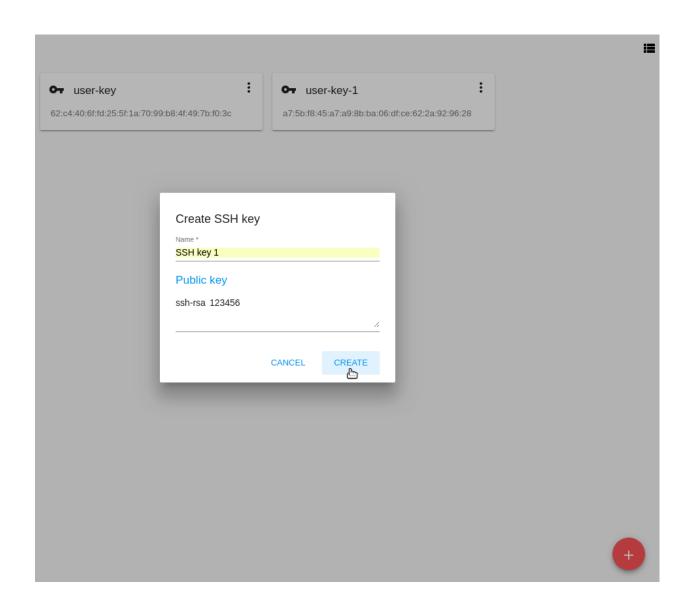
By clicking "Actions" you can expand the list of actions for those SSH keys that belong to your user only. The deleting action is available here.

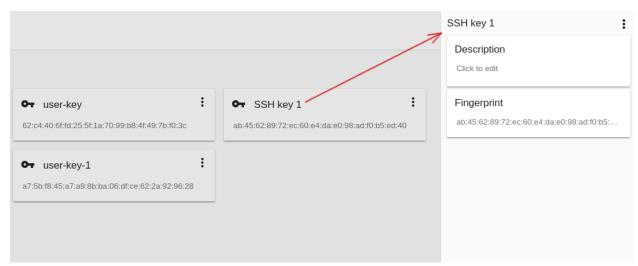
Click "Delete" to delete a key and then confirm your action in the dialogue window. The key will be deleted. Click "Cancel" to close the window without deleting a key.

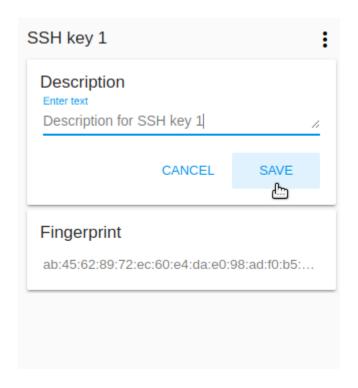
### 2.8 Accounts

### Contents • Accounts - Account List \* Filtering of Accounts

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- Create an Account
- Account Details Sidebar
  - \* Create a User
  - \* User Action Box
- Account Action Box

In the *Accounts* section Administrators can manage accounts and users in them. For an account, details and resource limits can be viewed. Please, note that the account limits are shared by all users in the account. If you are facing the problem of the lack of resources, contact your Administrator. Administrators are able to edit the limits of an account. Besides, they can monitor resource usage having access to the resource statistics for each account.

Administrators can see the list of accounts for the whole domain. They can create new users for an account, edit or delete a user.

If you are a User, you can view but not manage your account and users in it. For each user in the account, you can see the settings.

#### 2.8.1 Account List

Clicking *Accounts* in the left-side navigation bar you open the *Accounts* section. It presents the list of accounts. Administrators can see accounts for the whole domain. A user can see his/her account only, that is the account his/her user belongs to.

You can switch the view from list to box using the switch tool in the upper-right corner.

For each account in the list you can see the following information:

- · Account name:
- State Shows the account state by color spot: green for Enabled, red for Disabled statuses;
- Role A role assigned to the account Root Administrator, Resource Administrator, Domain Administrator, User, Find more information on roles in CloudStack in the official documentation.
- Role type A role type connected to the role.
- Domain The domain which the account belongs to.
- Action list Allows an Administrator to manage the account to disable or delete it. Find more details at
   Account Action Box.

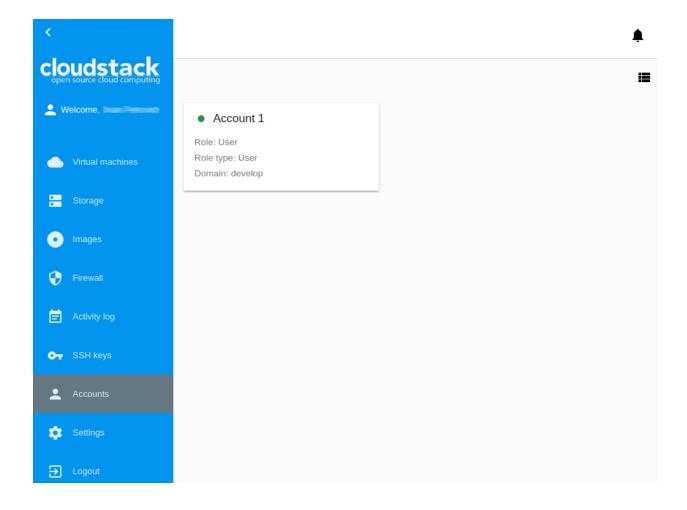
#### **Filtering of Accounts**

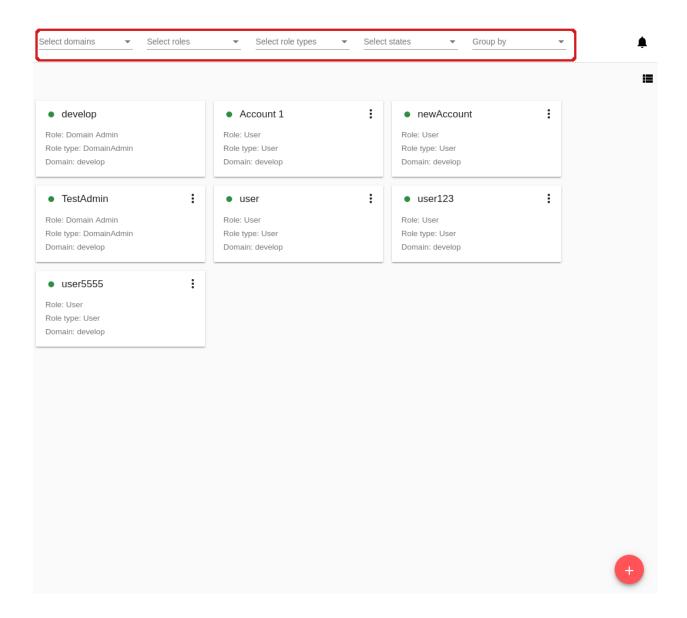
If you are an Administrator, filtering and search tools will help you to find an account in the list.

You can filter the list by:

- Domains Select a domain/domains available to you from the drop-down list.
- Roles Select a role Root Administrator, Resource Administrator, Domain Administrator and/or User -from the drop-down list.
- Role types Select a role type/types from the drop-down list.
- States Select a state/states Enabled and/or Disabled from the drop-down list.

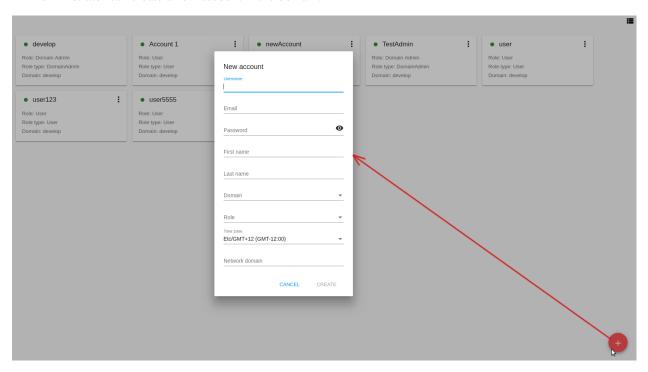
Besides, accounts can be grouped by the parameters mentioned above.





#### 2.8.2 Create an Account

An Administrator can create a new account in the domain.

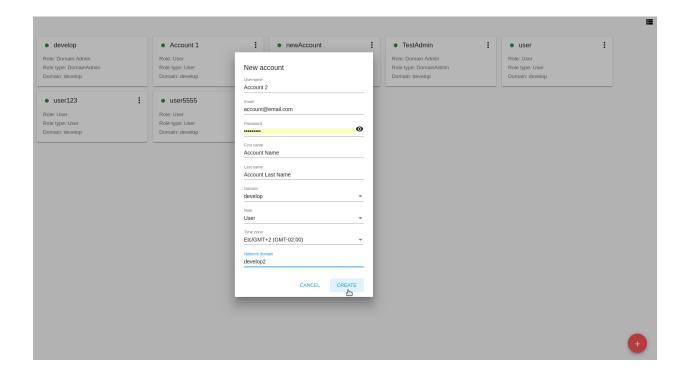


By clicking "Create" in the bottom-right corner you will open a form where the following fields should be completed:

**Note:** Required fields are marked with asterisks (\*).

- Name \* Enter any desired login ID for the account name. It should be unique within the domain.
- Email \* Enter the accounts email address.
- Password \* Enter any password you like. You can view the password that you are entering by clicking to the right. Hide the password under dots by clicking.
- First name \* Enter the first name of a person or the first part of the entity represented by the account. It can be a department or a customer.
- Last name \* Enter the last name of a person or the second part of the entity represented by the account (a customer or a department).
- Domain \* Select a domain in which the account is to be created.
- Role Select the role for the account.
- Time zone Set the time zone that corresponds to the account locale.
- Network domain If you want to assign a special domain name to the account's guest VM network, specify the DNS suffix.

Click "Create" to create the new account. Make sure it has appeared in the list of accounts.



A user is created automatically for the new account. User's name corresponds to the first and the last name specified in the account creation form. This user inherits account's email and time zone.

#### 2.8.3 Account Details Sidebar

For each account, the information is available in the details sidebar to the right. Click the account in the list to open the sidebar:

There are two tabs in the sidebar: General and Users.

The General tab contains the general information on the account: details, limits for resources.

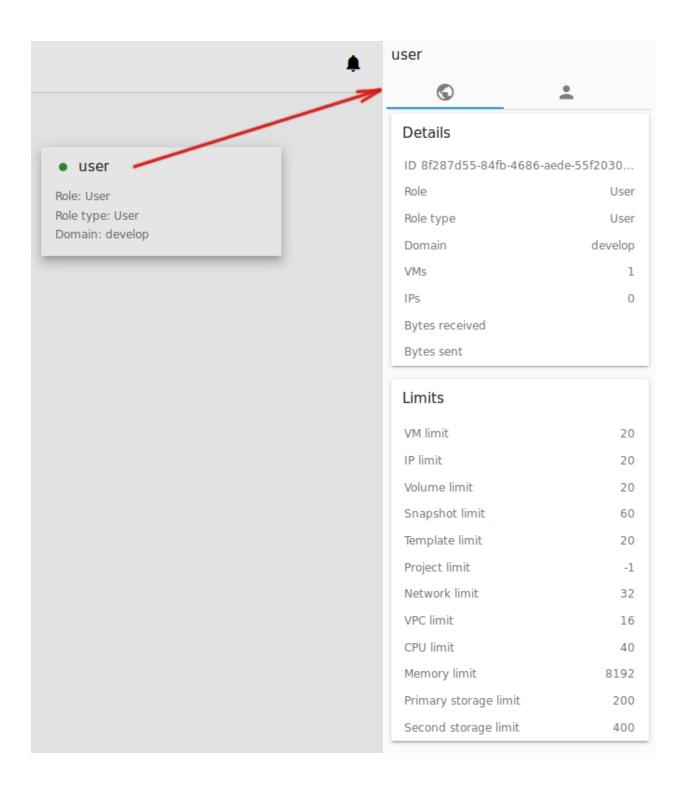
Administrators can edit the limits. Click "Edit" 
in the Limits block and change the values right in the block.

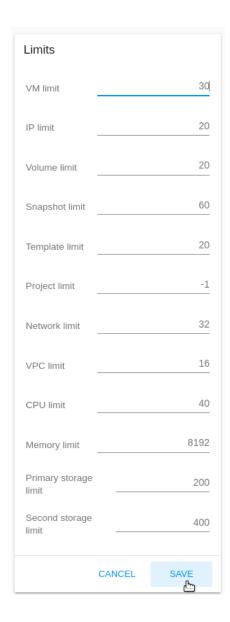
Administrators can see the statistics on resource usage at the bottom. Refresh the data by clicking  $^{\circ}$  .

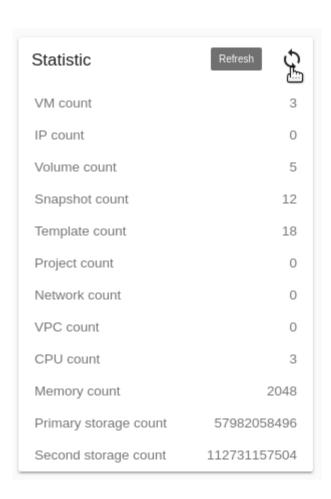


The Users tab contains the list of users in the account. For each user you can expand the information card where the following information is listed:

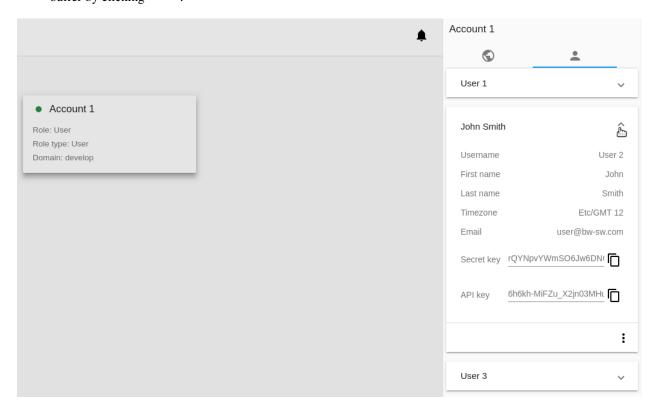
- Username;
- First and Last name;
- Timezone;
- Email;
- · Secret key The key generated for a user by clicking "Regenerate key" in the Action box. You can copy it to the buffer by clicking







• API key - The key generated for a user by clicking "Regenerate key" in the Action box. You can copy it to the buffer by clicking .



An Administrator has a list of actions available for each user. A user can manage his/her user only. A list of actions is available under the button. It contains the following actions:

- · Change password;
- Regenerate key.

Find more about actions for users in the *User Action Box* section.

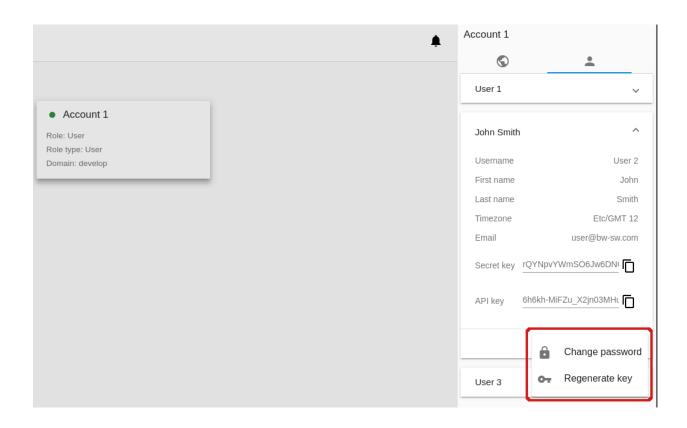
#### Create a User

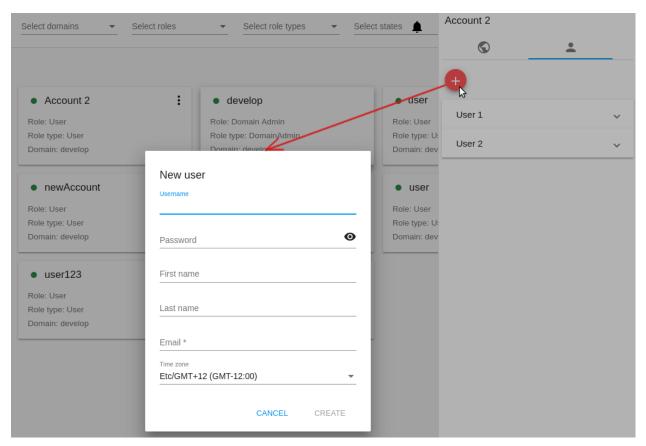


Administrators can create a new user from the *Users* tab of the Account Details sidebar by clicking "Create" In the appeared form fill in the following fields:

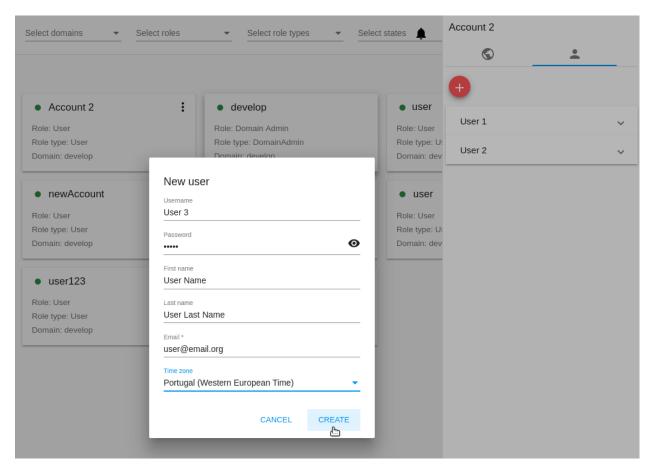
**Note:** Required fields are marked with asterisks (\*).

- Username \* Enter any desired user ID. It should be unique within the domain.
- Password \* Enter any password you like. You can view the password that you are entering by clicking to
  the right. Hide the password under dots by clicking.
- First name \* User's first name.





- Last name \* User's last name.
- Email \* Enter the user's email address.
- Time zone \* Set the timezone that corresponds to the user's locale. Select an option from the drop-down list.



Click "CREATE" to create the new user. It will appear in the list of users for this account.

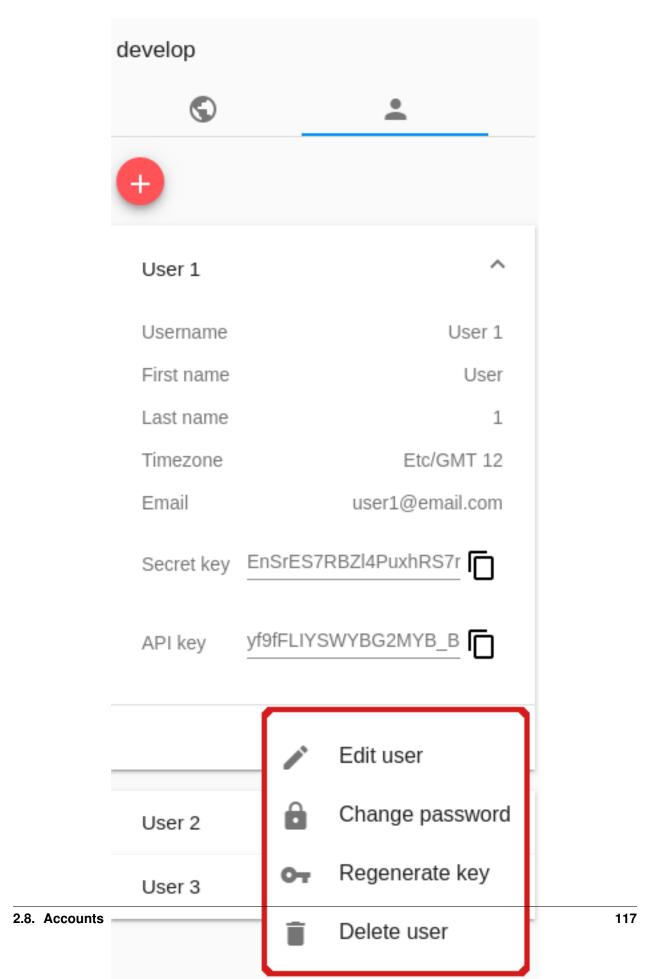
Click "CANCEL" to cancel the user creation.

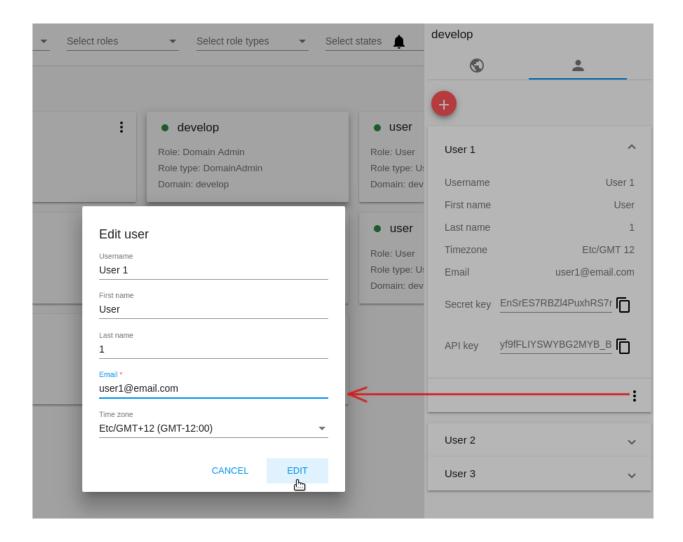
#### **User Action Box**

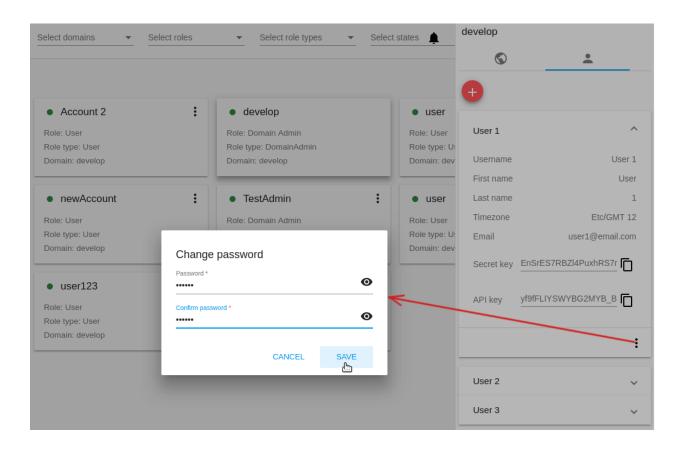
Administrators can manage a user via the Action box.

The list of actions allows an Administrator to:

- Edit user Opens a form to edit user's settings (name, email, timezone). Edit the information and click "SAVE" to save the edits.
- Change password Opens a modal window with two fields for you to enter a new password and confirm it. Use
  the view tool to view or hide a password while entering. Click "SAVE" to save the new password.
- Regenerate key Allows changing the keys secret and API for the user. Confirm your action in the dialogue window, and the keys will be changed.
- Delete a user Allows deleting a user from the system. Confirm your action in the dialogue window, and the user will be deleted.

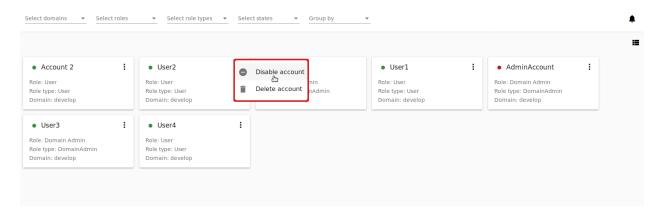






#### 2.8.4 Account Action Box

Administrators can manage an account via the Action box under ...



The list of actions allows an Administrator to:

- Disable account Allows disabling an account. By disabling the account all users for this account will no longer
  have access to their cloud resources. All running VMs will be immediately shut down. Click "Disable account"
  and confirm your action in the dialogue window. The account will be inactive.
- Enable account Allows activating a disabled account. Click "Enable account" and confirm your action in the dialogue window. The account will be activated.
- · Delete account Allows deleting an account from the system. Confirm your action in the dialogue window, and

the account will be deleted.

### 2.9 Settings

#### **Contents**

- Settings
  - Security
    - \* Change Password
    - \* Session Timeout
    - \* Save VM passwords by default
  - API Configuration
  - Look and Feel
    - \* Interface Language
    - \* First Day of Week
    - \* Time Format
    - \* Theme Color

In the Settings section a user can modify the interface by changing settings.

#### 2.9.1 Security

A user can manage the following security settings:

- Change password;
- Set the session timeout interval;
- the "Save VM passwords by default" option.

#### **Change Password**

Here you can change the password provided by your Administrator to the one you like. This will improve the account security.

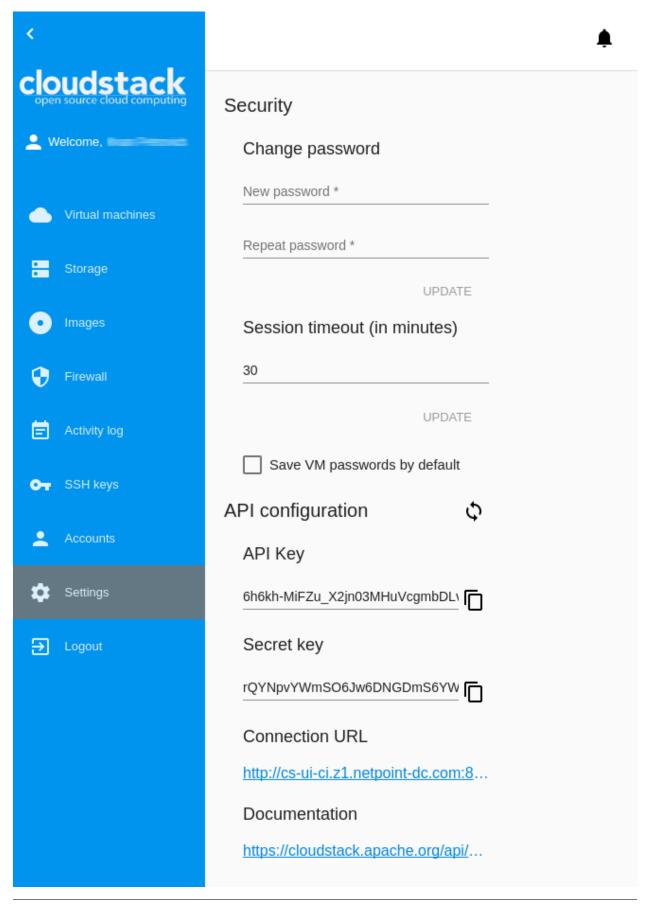
Enter a new password and re-enter it in the next field to confirm it:

Click "UPDATE" to save the new password.

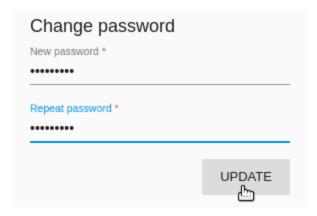
In case you have lost or forgotten your password, contact your Administrator.

#### **Session Timeout**

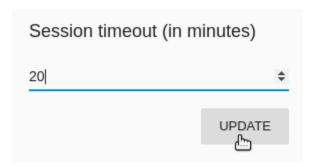
Here you can specify the maximum amount of time that an active session can be idle (without user activity) before it automatically closes. The default interval is 30 minutes.



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Set the desired time limit in minutes using the switch button • to the right or typing it just into the field. Then click "UPDATE" to save the changes.



The value is stored in user's tags.

The maximum allowed value is 300 minutes. Please, note that a long time period of an idle session decreases the account security.

The session timeout can be set in the configuration file. You will find more information in Config Guide.

#### Save VM passwords by default

This checkbox allows saving passwords to VM tags automatically for all created virtual machines requiring passwords.

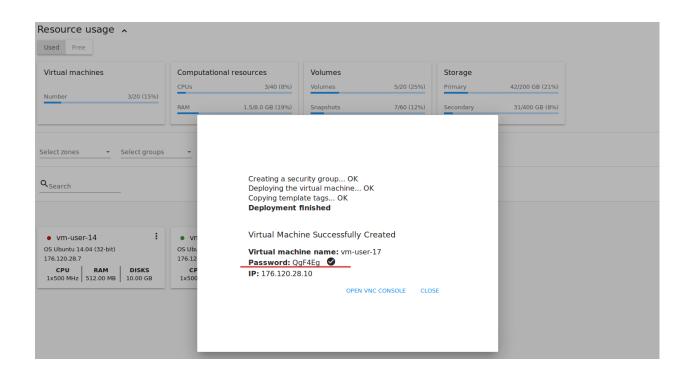
Tick this option here. The passwords will be saved to VM tags right at the moment VMs are created. You will see a password (if it is required for the VM) is marked as saved in a dialogue window after the new VM is deployed:

If this option is not activated, every time when creating a machine the system will ask you to save the password by clicking "SAVE" next to it:

Then the system will ask you if you wish to save passwords to VM tags automatically. If you click "Yes", the "Save VM passwords by default" option will be activated in *Settings*. You will find more information about VM creation in the *Create a Virtual Machine* section.

#### 2.9.2 API Configuration

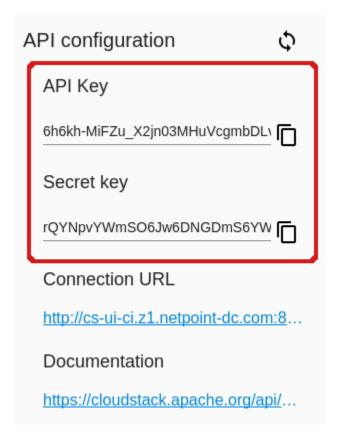
In this block of settings you can see and manage the API configurations: regenerate API keys, see the connection URL.





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You can see an API key and a Secret key in corresponding fields. You can copy any of them clicking to the right.



Regenerate the keys by clicking above the fields. New keys will be generated.

Below you can view a connection URL which is used to send requests to CloudStack API. All requests are listed in the Apache CloudStack documentation available by the link below.

#### 2.9.3 Look and Feel

In this block you can adjust the interface look.

#### **Interface Language**

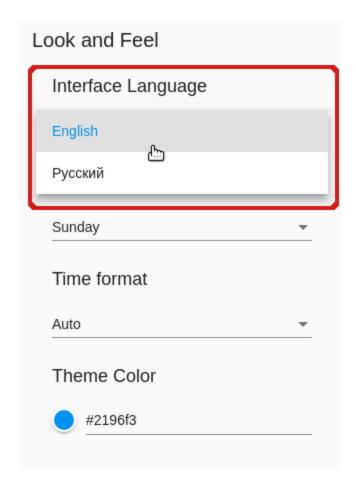
Select the language of your interface. Currently two options are available in the drop-down list: Russian and English.

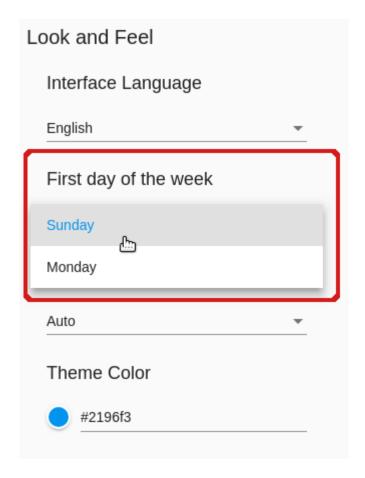
#### First Day of Week

In this block, you have the opportunity to choose between two types of weeks: Sunday - Saturday or Monday - Sunday. From the drop-down list select the day when a week starts: Monday or Sanday.

API configuration
API Key
6h6kh-MiFZu_X2jn03MHuVcgmbDL\
Secret key
rQYNpvYWmSO6Jw6DNGDmS6YW
Connection URL
http://cs-ui-ci.z1.netpoint-dc.com:8
Documentation
https://cloudstack.apache.org/api/
API configuration $\diamondsuit$
API Key
API Key 6h6kh-MiFZu_X2jn03MHuVcgmbDL\
•
6h6kh-MiFZu_X2jn03MHuVcgmbDL\
6h6kh-MiFZu_X2jn03MHuVcgmbDL\
6h6kh-MiFZu_X2jn03MHuVcgmbDL\ Secret key  rQYNpvYWmSO6Jw6DNGDmS6YW
6h6kh-MiFZu_X2jn03MHuVcgmbDL\ Secret key  rQYNpvYWmSO6Jw6DNGDmS6YW  Connection URL

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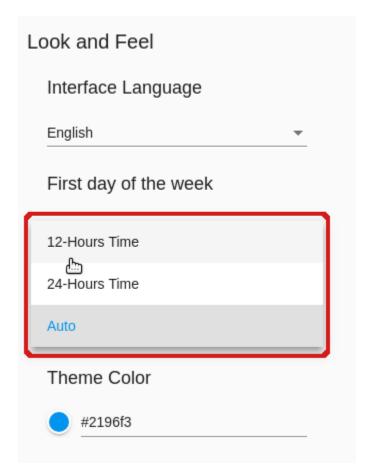




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#### **Time Format**

Here you have the opportunity to switch the time format from AM/PM to 24H. You can set it to "Auto" and the time format will be set in correspondence to the interface language: AM/PM if you select English and 24H if you select Russian.



#### **Theme Color**

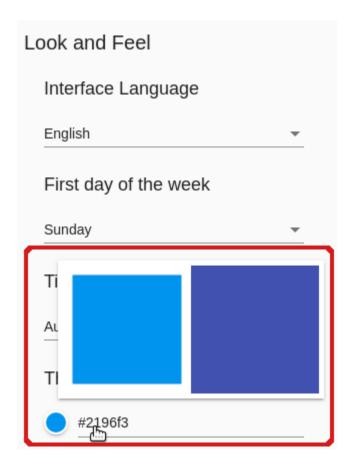
Select a preferred theme color. Currently two options are available: "blue-red" and "indigo-pink". The blue-red one is used by default.

Click the field and select another color if you wish.

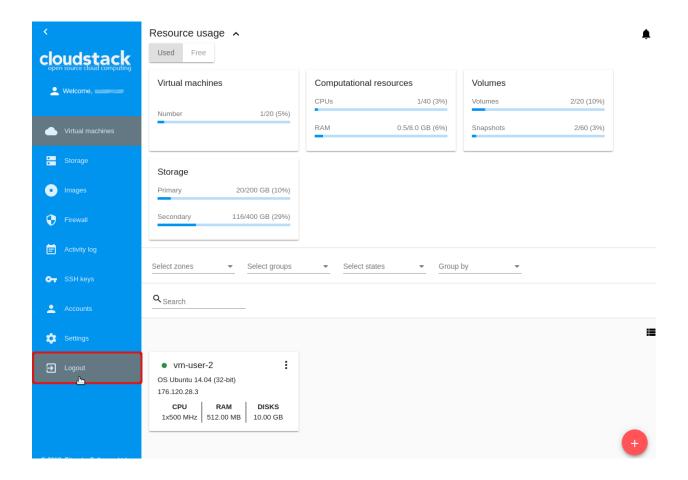
## 2.10 Logout

Clicking Logout in the bottom of the navigation menu bar a user can logout from CloudStack.

It will move a user back to the Login form.



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# $\mathsf{CHAPTER}\,3$

## Indices and tables

- genindex
- modindex
- search