

# vSphere Optimization Assessment Step-by-Step Guide

We've got a [great set of videos](#) to walk you through the new VMware vSphere® Optimization Assessment reports. This cheat sheet covers the same information and can be used as a reminder, either before or after you've watched the videos.

We've broken the vSphere Optimization Assessment reports into three phases



## Connecting to a Deployed Node for initial Express Installation

1. Enter the node name in the address field of your browser. (You could also enter the IP address if the node name has not been configured in the DNS.) You'll be automatically routed to the initial setup screen.
2. Choose Express Installation. You'll see a workflow diagram show the required steps.
3. Choose Next and create an administrator password for the environment.
4. Choose Next, then Finish.
5. After a few minutes, you'll see the main product login screen.
6. After logging in, select the Content icon, then Reports. You'll see the new reports at the top of your list. You can rename them if you'd like.

## Phase One: Assess Configuration Health

Configuration data is collected immediately after setup and configuration so you can run the vSphere Optimization Assessment Configuration Report on the very first day. This will help you identify and correct inconsistent cluster, host and VM settings as well as give you visibility into HA, DR, Admission Control VMware Tools and security settings. You'll also have a clearer view of your compute and storage distribution.

1. Highlight the Configuration Report and select the Run Template icon.
2. Select the object you want to report against then select OK. You may want to start at an object level of a smaller environment and work your way up as you get a feel for the data in the report.
3. Select the Generated Reports tab. It may take a few minutes for the report to complete. You can select Refresh to update the status. Select the PDF export option. You may also wish to look at the CSV option but these reports were designed for PDF.
4. We recommend focusing on the configurations of:
  - Cluster and Host
  - HA, DRS and Admission Control
  - VM Tools

## Phase Two: Identify Performance Bottlenecks

After the vSphere Optimization Assessment has been collecting data for five to seven days, the performance report will surface problem alerts and help you identify bottlenecks.

1. Select your Performance Report and then the Run Template icon.
2. Again, select a smaller environment to run the report against while you are learning your way around.
3. Select the Generated Reports tab. As before, the report may take a few minutes to complete depending on the size of the environment. When it's complete, select the PDF export.
4. We recommend looking at:
  - Patterns of high Workload: Correlate this with the Stress Badge in the UI, which indicates high Workload patterns and opportunities to distribute workload.
  - Problem Alerts (under Health): Get recommendations on how to resolve problems.
  - CPU Ready: Look for VMs with 20% or more CPU Ready as this can indicate contention between VMs.
  - Host Density Badge Score: A high badge score indicates optimal distribution of VMs. A lower score indicates potential opportunities to consolidate VMs on a host without impacting performance.

## Phase Three: Optimize Capacity

After the vSphere Optimization Assessment has been collecting data for 21 days, you can run the Capacity Assessment Report.

1. Select your Capacity Assessment Report and then the Run Template icon.
2. Again, select a smaller environment to run the report against while you learn your way around.
3. Select the Generated Reports tab, then select the PDF export once the report has completed.
4. We recommend looking at:
  - Capacity Utilization: Identify idle and overprovisioned VMs, discover capacity remaining across CPU, storage and memory, find reclaimable capacity by looking at idle and powered off VMs. Pay particular attention to the last line of the tables for the most significant resource consumers and opportunities to reclaim.
  - Right Sizing: Compare actual to recommended CPU, memory and disk.
  - Host Density/Time Remaining: Make sure you're not at risk of running out of resources.
  - VM Snapshots: Clean up old snapshots to reclaim space.

## Pulling it All Together

In addition to running each report individually, you can run the Consolidated Report to see all three individual reports in one place. Keep in mind that the longer vSphere Optimization Assessment runs, the more accurate the predictive analytics will be so go back through these reports periodically during your evaluation period.

## Learn More

Get value from day one with free automated reports of your vSphere configuration health, potential performance improvements and capacity optimization opportunities. Start your free vSphere Optimization Assessment now

<https://www.vmware.com/assessment/voa>