

IBM Cloud Pak for Data With Managed OpenShift on AWS Marketplace

Deployment Guide

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Overview

This deployment guide provides step-by-step instructions for deploying IBM Cloud Pak for Data on ROSA (Red Hat OpenShift Service on AWS) Container Platform cluster on the AWS Cloud. You can automatically deploy a multi-master, production instance of Cloud Pak for Data.

IBM Cloud Pak for Data enables enterprise users to connect, catalog, govern, transform, and analyze the data regardless of where the data is.

IBM Cloud Pak for Data on AWS

IBM Cloud Pak for Data is an analytics platform that helps prepare data for artificial intelligence (AI). It enables data engineers, data stewards, data scientists, and business analysts to collaborate using an integrated multiple-cloud platform.

IBM Cloud Pak for Data uses IBM's deep analytics portfolio to help organizations meet data and analytics challenges. The required building blocks (collect, organize, analyze, infuse) for information architecture are available using IBM Cloud Pak for Data on AWS.

IBM Cloud Pak for Data uses AWS services and features, including virtual private clouds (VPCs), Availability Zones, security groups, Elastic Block Storage, and Elastic Load Balancing to build a reliable and scalable cloud platform.

This reference deployment provides AWS CloudFormation templates to deploy Cloud Pak for Data onto a new OpenShift cluster. This cluster includes:

- A ROSA (Red Hat OpenShift Service on AWS) Container Platform cluster created in a new or existing VPC on Red Hat CoreOS (RHCOS) instances, using the [Redhat OpenShift Installer Provisioned Infrastructure](#). See the [OpenShift Container Platform Installation overview](#) for details about the underlying OpenShift deployment architecture.
- Storage: EFS or Amazon FSx for NetApp ONTAP storage
- Scalable OpenShift compute nodes running Cloud Pak for Data services.

For more information about Cloud Pak for Data, see the [IBM Cloud Pak for Data Documentation](#)

This product requires an internet connection to deploy properly.

The following packages are downloaded on deployment: git, wget, httpd-tools, python3, python3-pip, jq, unzip, podman, terraform, awscli2, openshift-client-linux-4.14.17, helm-v3.9.4, quickstart-linux-utilities, amazon-ssm-agent from below repos:

<https://github.com/aws-quickstart/quickstart-linux-utilities>

https://s3-us-west-1.amazonaws.com/amazon-ssm-us-west-1/latest/linux_amd64/amazon-ssm-agent.rpm

Cost and licenses

The Cloud Pak for Data environment is deployed by using AWS CloudFormation template. You are responsible for the cost of the AWS services used for the infrastructure.

The AWS CloudFormation template for these deployments includes configuration parameters that you can customize. You can use it to build a new VPC for your Data Express solution on AWS cluster or deploy on an existing AWS VPC. Some of these settings, such as instance type, will affect the cost of deployment. For cost estimates, see the pricing pages for each AWS service you will be using. Prices are subject to change.

Pricing:

ROSA Service Fee: <https://aws.amazon.com/rosa/pricing/>

Infrastructure Fee:

- Master Nodes: 3 * m5.2xlarge
- Infra Nodes: 2 * r5.xlarge
- Worker Nodes: Count * m5.4xlarge
- Bastion Node: 1 * i3.large

Storage: EFS or Amazon FSx for NetApp ONTAP storage

For more information about licensing terms, [Cloud Pak for Data software license agreement](#).

Upgrading to the latest version of Cloud Pak for Data indicates your acceptance of any new terms that may be applicable for the new version. To determine if new terms apply and to review them, please visit our [IBM Terms](#),

To execute a search for License Information (LI) documents, and locate the LI applicable for the version you wish to upgrade to. To locate the LI for the Cloud Pak for Data Standard edition, type, 'IBM Cloud Pak for Data Standard Edition' and for the Enterprise edition type, 'IBM Cloud Pak for Data Enterprise Edition.'

In the event there are no results for the version you are upgrading to, review the LI associated to the previous version which would apply in this scenario (for example, if you are upgrading to version 4.8.x and there is no LI for this version, you will need to review the LI for version 4.0.x)

Architecture

Deploying the [AWS Marketplace](#) template for a Cloud Pak for Data on new VPC with **default parameters** builds the following Cloud Pak for Data environment in the AWS Cloud to deliver the solution:

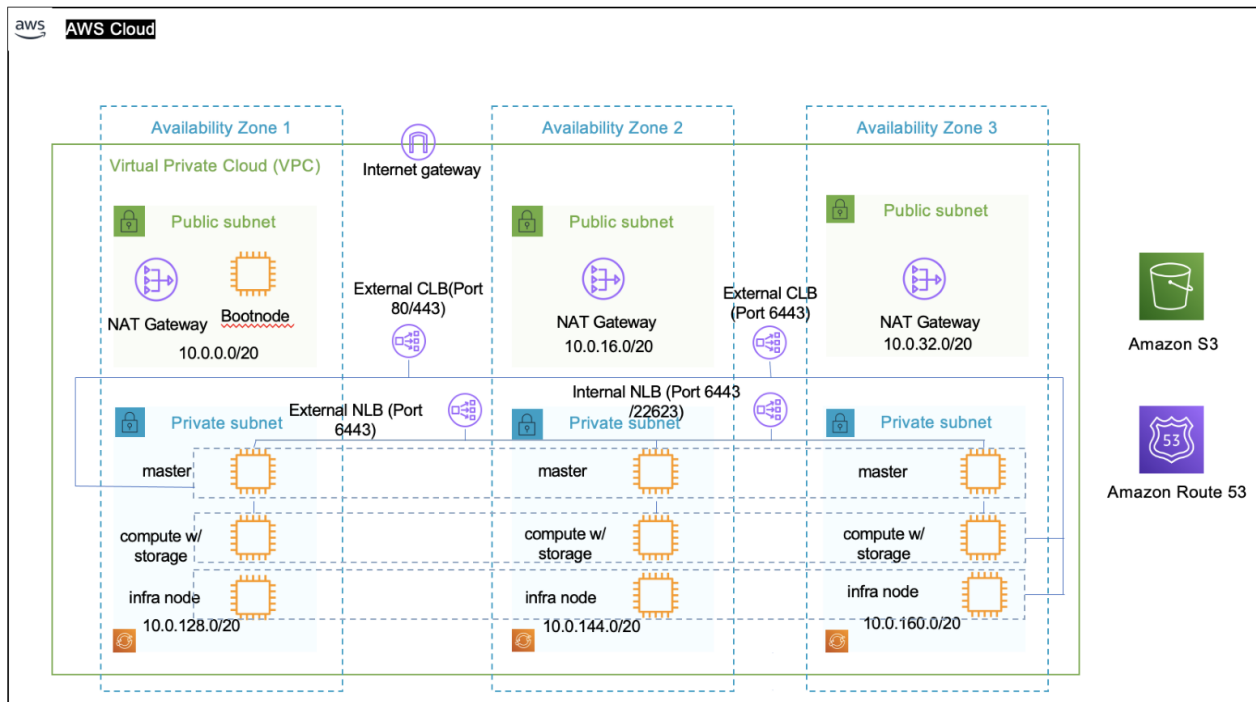


Figure 2: Deployment architecture for Cloud Pak for Data on AWS

The Cloud Formation Stack sets up the following:

- An architecture that spans one or three Availability Zones.* A VPC configured with public and private subnet according to AWS best practices, to provide you with your own virtual network on AWS. *
- In the public subnets:
 - Managed network address translation (NAT) gateway to allow outbound internet access for resources in the private subnet.*
 - A boot node Amazon Elastic Compute Cloud (Amazon EC2) instance that also serves as a bastion host to allow inbound Secure Shell (SSH) access to EC2 instances in private subnets.
- In the private subnets:
 - OCP master instances up to three Availability Zones.
 - OpenShift Container Platform (OCP) compute nodes that combined, contain Cloud Pak for Data Collect, Organize, and Analyze services.
 - Elastic Block Storage disks that are mounted on the compute nodes for container persistent data
- A Classic Load Balancer spanning the public subnets for accessing Cloud Pak for Data from a web browser.
- A Classic Load Balancer spanning the public subnets for accessing the OCP master instances.
- A Network Load Balancer spanning the private subnets for routing internal OpenShift application programming interface (API) traffic to the OCP master instances.

* The template that deploys into an existing VPC skips the components marked by asterisks and prompts you for your existing VPC configuration.

Cloud Pak for Data microservices are preconfigured on compute nodes. The following diagram shows the platform architecture.

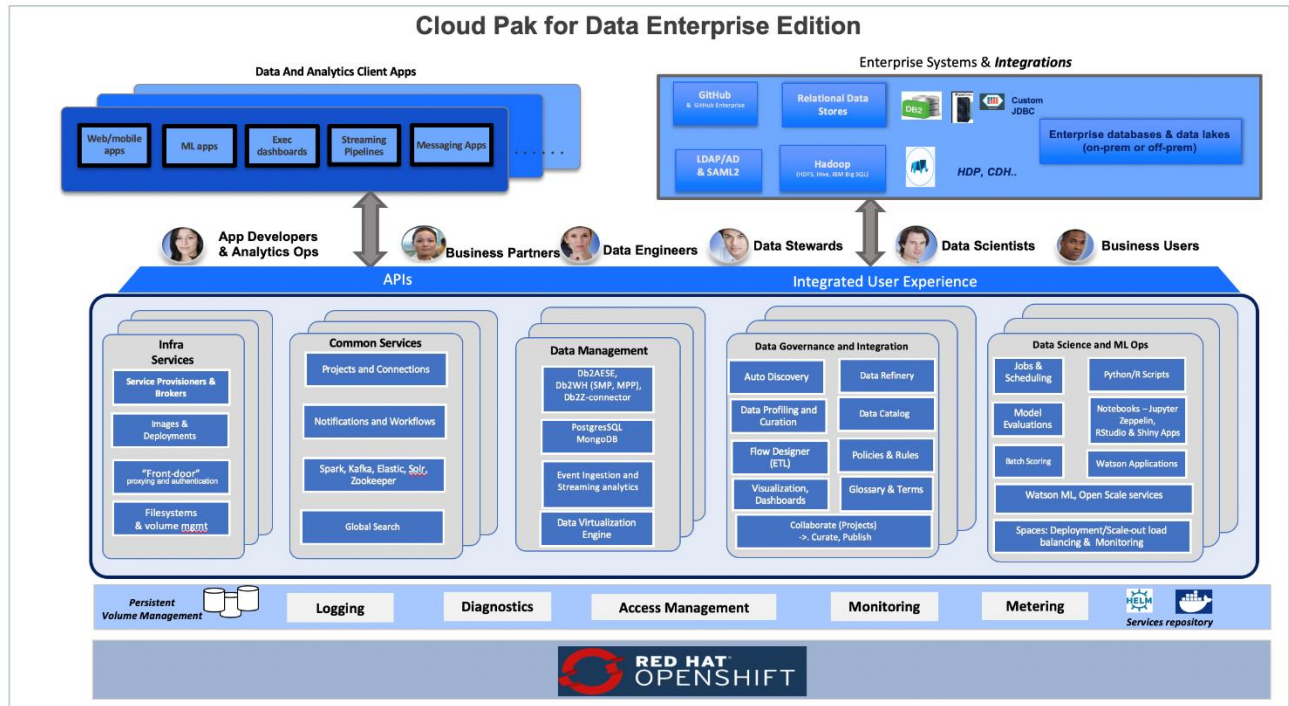


Figure 3: Cloud Pak for Data services

Planning the deployment

Specialized knowledge

This deployment assumes basic familiarity with Cloud Pak for Data components and services. If you're new to Cloud Pak for Data and Red Hat OpenShift, see the [Additional resources](#) section.

This deployment also assumes familiarity with the OpenShift command line interface and Linux, in addition to a moderate level of familiarity with AWS services.

Technical requirements

For Cloud Pak for Data requirements, see [System requirements for Cloud Pak for Data](#).

[Red Hat Enterprise Linux CoreOS \(RHCOS\)](#) is used for the OpenShift compute node instances in this deployment.

Before you launch the template, your account must have resource quotas as specified in the following table.

[Resources](#)

If necessary, request [service quota increases](#) for the following resources. You might need to do this if an existing deployment uses these resources, and you might exceed the default quotas with this deployment. The [Service Quotas console](#) displays your usage and quotas for some aspects of some services. For more information, see the [AWS documentation](#).

Resource	This deployment uses
VPCs	1
Elastic IP addresses	1
Network Load Balancers	2
Classic Load Balancers	2
i3.large instances	1
m5.2xlarge instances	3
m5.4xlarge instances	3

[Regions](#)

This deployment uses 1 or 3 Availability Zones.

[Key pair](#)

Make sure that at least one Amazon EC2 key pair exists in your AWS account in the Region where you are planning to deploy the template. Make note of the key pair name. You'll be prompted for this information during deployment. To create a key pair, follow the [instructions in the AWS documentation](#).

If you're deploying for testing or proof-of-concept purposes, we recommend that you create a new key pair instead of specifying a key pair that's already being used by a production instance.

[IAM permissions](#)

To deploy the template, you must log in to the AWS Management Console with AWS Identity and Access Management (IAM) permissions for the resources and actions the templates will deploy.

The permissions required for the creation of ROSA (Redhat OpenShift Service on AWS) in sts mode. Please review: https://docs.openshift.com/rosa/rosa_architecture/rosa-sts-about-iam-resources.html#rosa-minimum-scp_rosa-sts-about-iam-resources

Deployment options

This template provides the following deployment options:

- **Deploy Cloud Pak for Data into a new VPC** (end-to-end deployment). This option builds a new AWS environment consisting of the VPC, subnets, NAT gateways, security groups, bastion hosts, and other infrastructure components, and then deploys Cloud Pak for Data into this new VPC.
- **Deploy Cloud Pak for Data into an existing VPC**. This option provisions Cloud Pak for Data in your existing VPC infrastructure.

The template also lets you configure CIDR blocks, instance types, and Cloud Pak for Data settings, as discussed later in this guide.

Pre-requisites

Ensure the following subscriptions are in place with your existing Cloud Pak for Data entitlements or obtained from [AWS Marketplace](#)

Step 1. IBM Cloud Pak for Data Subscription

When you purchase Cloud Pak for Data from Marketplace, you will get the Cloud Pak for Data entitlement Username and API Key. You should keep it handy as it's a required parameter in the Cloud Formation Template

Step 2. ROSA Subscription

Enable ROSA

* Enable ROSA [\[here\]](#)

* Get RedHat ROSA token [\[here\]](#)

Step 3. Sign in to your AWS account

1. Sign in to your AWS account at <https://aws.amazon.com> with an AWS Identity and Access Management (IAM) user role that has the necessary permissions. For details, see [Planning the deployment](#), earlier in this guide.
2. Make sure that your AWS account is configured correctly, as discussed in [Technical requirements](#), earlier in this guide.
3. Use the Region selector in the navigation bar to choose the AWS Region where you want to deploy Cloud Pak for Data on AWS.
4. The following resources should be made available for Cloud Pak for Data deployment
 - A key pair to SSH to the cluster nodes. In the navigation pane of the [Amazon EC2 console](#), choose **Key Pairs**, and then choose your key pair from the list.
 - An existing S3 Bucket to store deployment log files.

Step 4. Launch the Deployment

Notes The instructions in this section reflect the current version of the AWS CloudFormation console. If you're using the redesigned console, some of the user interface elements might be different.

You are responsible for the cost of the AWS services used while running this deployment. For full details, see the pricing pages for each AWS service you will be using for this deployment. Prices are subject to change.

5. Launch the AWS CloudFormation template into your AWS account from the AWS Marketplace directly or you can download the template and launch it separately from your account.

A Cloud Pak for Data standard deployment takes about 3 hours.

1. Check the Region that's displayed in the upper-right corner of the navigation bar and change it if necessary. This is where the network infrastructure for Cloud Pak for Data will be built. The template is launched in the US East (N. Virginia) Region by default.
2. On the **Create stack** page, keep the default setting for the template URL, and then choose **Next**.

- On the **Specify stack details** page, change the stack name if needed. Review the parameters for the template. Provide values for the parameters that require input. For all other parameters, review the default settings and customize them as necessary.

In the following tables, parameters are listed by category and described separately for these deployment options:

- [Parameters for deploying Cloud Pak for Data into a new VPC](#)
- [Parameters for deploying Cloud Pak for Data into an existing VPC](#)

When you finish reviewing and customizing the parameters, choose **Next**.

OPTION 1: PARAMETERS FOR DEPLOYING CLOUD PAK FOR DATA INTO A NEW VPC

VPC network configuration:

Parameter label (name)	Default	Description
Number of Availability Zones (NumberOfAZs)	1	The number of Availability Zones to be used for the deployment. Allowed values: 1 or 3.
Availability Zones (AvailabilityZones)	<i>Requires input</i>	The list of Availability Zones to use for the subnets in the VPC. The template uses one/ three Availability Zones.
VPC CIDR (VPCCIDR)	10.0.0.0/16	The CIDR block for the VPC to be created.
Private subnet 1 CIDR (PrivateSubnet1CIDR)	10.0.0.0/19	The CIDR block for the private subnet located in Availability Zone 1.
Private subnet 2 CIDR (PrivateSubnet2CIDR)	10.0.32.0/19 The CIDR block for the private subnet located in Availability Zone 2.	The CIDR block for the private subnet located in Availability Zone 2.
Private subnet 3 CIDR (PrivateSubnet3CIDR)	10.0.64.0/19 The CIDR block for the private subnet located in Availability Zone 3.	The CIDR block for the private subnet located in Availability Zone 3.
Public subnet 1 CIDR (PublicSubnet1CIDR)	10.0.128.0/20	The CIDR block for the public subnet located in Availability Zone 1.
Public subnet 2 CIDR (PublicSubnet2CIDR)	10.0.144.0/20	The CIDR block for the public subnet located in Availability Zone 2.
Public subnet 3 CIDR (PublicSubnet3CIDR)	10.0.160.0/20	The CIDR block for the public subnet located in Availability Zone 3.
BootNodeAccessCIDR (BootNodeAccessCIDR)	<i>Requires input</i>	The CIDR IP range that is permitted to access the Boot Node instance. We recommend that you set this value to a trusted IP range. The value `0.0.0.0/0` permits all IP

Parameter label (name)	Default	Description
		addresses to access. Additional values can be added post-deployment from the Amazon EC2 console.
Cluster Network CIDR (ClusterNetworkCIDR)	10.128.0.0/14	The Cluster Network CIDR IP range that is used as IP address pools for pods.
ServiceNetworkCIDR	172.30.0.0/16	The Service Network CIDR IP range that is used as block of IP addresses for services.

Amazon EC2 configuration:

Parameter label (name)	Default	Description
Key pair name (KeyPairName)	<i>Requires input</i>	The name of an existing public/private key pair, which allows you to securely connect to your instance after it launches.

OpenShift hosts configuration:

Parameter label (name)	Default	Description
Compute instance type (NodesInstanceType)	m5.4xlarge	The EC2 instance type for the OpenShift node instances.
Number of compute nodes (NumberOfNodes)	3(default)	The number of nodes depends on the numbers of cp4d services selected for the deployment. For more info check here .
		Warning If the number of node instances exceeds your Red Hat entitlement limits or AWS instance quotas, the stack will fail. Choose a number that is within your limits.
Cluster name (ClusterName)	<i>Requires input</i>	Custom cluster name for kubernetes.io/cluster/tags. If left blank, will use the stack name suffixed with the AWS Region.
PrivateCluster (PrivateCluster)	false	To Deploy a Private cluster select true and false for Public cluster
Choose OpenShift Version (OpenShiftVersion)	4.14.17	Choose a supported OpenShift Version .

Storage Configuration:

Parameter label (name)	Default	Description
Storage type for Cluster (StorageType)	<i>EFS-EBS</i>	EFS-EBS and fsx options are available.
FSx Admin password (FSxAdminPassword)	Netapp1!	Default fsx filesystem fsxadmin user password. Applicable only when Storage Type chosen is fsx
FSx Storage Capacity (FSxStorageCapacity)	1TB	FSx file system Storage Capacity. Applicable only when Storage Type chosen is fsx
FSx ThroughPut Capacity (FSxThroughputCapacity)	128MBs	FSx file system throughput Capacity. Applicable only when Storage Type chosen is fsx
FSx Endpoint CIDR (FSxEndpointCIDR)	10.0.255.192/26	The IP address range in which the endpoints to access your fsx file system will be created, required only for multi-AZ deployment. Applicable only when Storage Type chosen is fsx

ROSA subscription information:

Parameter label (name)	Default	Description
ROSA Token	<i>Requires input</i>	Update the value with the ROSA Token.

IBM Cloud Pak for Data configuration:

Parameter label (name)	Default	Description
IBM Cloud Pak for Data Entitled Registry User (APIUsername)	cp	Enter the IBM Cloud Pak for Data Username value to access IBM Container Registry.
IBM Cloud Pak for Data Entitled Registry API key Value (APIKey)	—	Enter the IBM Cloud Pak for Data API key to access IBM Container Registry
License agreement (LicenseAgreement)	—	I have read and agreed to the license terms for IBM Cloud Pak for Data that were provided to me at time of purchase.
Output S3 bucket name (ICPDDeploymentLogsBucketName)	<i>Requires Input</i>	The Existing S3 bucket name where the zip file output should be placed.

IBM Cloud Pak for Data services:

Parameter label (name)	Default	Description
IBMKnowledgeCatalog	no	Installs Watson Knowledge Catalog service.
Watson Query	no	Installs the Watson Query(Data Virtualization) service.
AnalyticsEngine	no	Installs the Analytics Engine service.
WatsonStudio	no	Installs the Watson Studio service.
WatsonMachineLearning	no	Installs the Watson Machine Learning service.
WatsonAIOpenscale	no	Installs the Watson AI Openscale service.
SPSSModeler	no	Installs the SPSS Modeler service.
CognosDashboardEmbedded	no	Installs the Cognos Dashboard Embedded service.
DataStage	no	Installs the DataStage service.
Db2Warehouse	no	Installs the Db2 Warehouse service.
Db2OLTP	no	Installs the Db2OLTP service.
CognosAnalytics	no	Installs the Cognos Analytics service.
IBM Match 360 with Watson	no	Installs the IBM Match 360 with Watson service.
DecisionOptimization	no	Installs the Decision Optimization service.
BigSQL	no	Installs the BigSQL service.
PlanningAnalytics	no	Installs the Planning Analytics service.

Parameter label (name)	Default	Description
Watsonx Assistant	no	Installs Watsonx Assistant. <i>Note: Only single Availability zone is supported for a successful Watsonx Assistant installation. Multi Availability zone is not supported.</i>
Watson Discovery	no	Installs Watson Discovery service.
Watson Speech	no	Installs Watson Speech service.
Manta	no	Installs Manta Service. <i>Note: For a successful Manta service installation, IBM Knowledge Catalog service is the pre requisite. Set both parameters Manta and IBM Knowledge Catalog to 'yes' for a successful installation.</i>
OpenPages	no	Installs the OpenPages service.
IBM Db2 Data Management Console	no	Installs the Data Management Console service.
Factsheets	no	Installs the Factsheets service. <i>Note: For a successful installation of the Factsheets service, IBM Knowledge Catalog service or Watson Studio service must have been installed on the cluster.</i>
RStudio	no	Installs the RStudio service.
WatsonPipelines	no	Installs the Watson Pipelines service.

OPTION 2: PARAMETERS FOR DEPLOYING CLOUD PAK FOR DATA INTO AN EXISTING VPC

Network configuration:

Parameter label (name)	Default	Description
Number of Availability Zones (NumberOfAZs)	1	The number of Availability Zones to be used for the deployment. Allowed values: 1 or 3.
VPC ID (VPCID)	<i>Requires input</i>	The ID of your existing VPC for deployment.
VPC CIDR (VPCCIDR)	<i>Requires input</i>	The CIDR block for the VPC to be created.
Private subnet 1 ID (PrivateSubnet1ID)	<i>Requires input</i>	The ID of the private subnet in Availability Zone 1 for the workload (e.g., subnet-a0246dcd).

Parameter label (name)	Default	Description
Private subnet 2 CIDR (PrivateSubnet2CIDR)	<i>Requires input</i>	The CIDR block for the private subnet located in Availability Zone 2.
Private subnet 3 CIDR (PrivateSubnet3CIDR) 1	<i>Requires input</i>	The CIDR block for the private subnet located in Availability Zone 3.
Public subnet 1 ID (PublicSubnet1ID)	<i>Requires input</i>	The ID of the public subnet in Availability Zone 1 for the ELB load balancer (e.g., subnet-9bc642ac).
Public subnet 2 CIDR (PublicSubnet2CIDR)	<i>Requires input</i>	The CIDR block for the public subnet located in Availability Zone 2.
Public subnet 3 CIDR (PublicSubnet3CIDR)	<i>Requires input</i>	The CIDR block for the public subnet located in Availability Zone 3.
BootNodeAccessCIDR (BootNodeAccessCIDR)	<i>Requires input</i>	The CIDR IP range that is permitted to access the Boot Node instance. We recommend that you set this value to a trusted IP range. The value `0.0.0.0/0` permits all IP addresses to access. Additional values can be added post-deployment from the Amazon EC2 console.
Cluster Network CIDR (ClusterNetworkCIDR)	<i>Requires input</i>	The Cluster Network CIDR IP range that is used as IP address pools for pods.
ServiceNetworkCIDR	<i>Requires input</i>	The Service Network CIDR IP range that is used as block of IP addresses for services.

Amazon EC2 configuration:

Parameter label (name)	Default	Description
Key pair name (KeyPairName)	<i>Requires input</i>	The name of an existing public/private key pair, which allows you to securely connect to your instance after it launches.

OpenShift hosts configuration:

Parameter label (name)	Default	Description
Compute instance type (NodesInstanceType)	m5.4xlarge	The EC2 instance type for the OpenShift node instances.
Number of compute nodes (NumberOfNodes)	3(default)	The number of nodes depends on the numbers of cp4d services selected for the deployment. For more info, check here .
<p>Warning If the number of node instances exceeds your Red Hat entitlement limits or AWS instance quotas, the stack will fail. Choose a number that is within your limits.</p>		

Parameter label (name)	Default	Description
Cluster name (ClusterName)	<i>Requires input</i>	Custom cluster name for kubernetes.io/cluster/tags. If left blank, will use the stack name suffixed with the AWS Region.
Private Cluster (PrivateCluster)	false	To Deploy a Private cluster select true and false for Public cluster.
Choose OpenShift Version (OpenShiftVersion)	4.14.17	Choose a supported OpenShift Version .

Storage Configuration:

Parameter label (name)	Default	Description
Storage type for Cluster (StorageType)	<i>EFS-EBS</i>	EFS-EBS and fsx options are available.
FSx Admin password (FSxAdminPassword)	Netapp1!	Default fsx filesystem fsxadmin user password. Applicable only when Storage Type chosen is fsx
FSx Storage Capacity (FSxStorageCapacity)	1TB	FSx file system Storage Capacity. Applicable only when Storage Type chosen is fsx
FSx ThroughPut Capacity (FSxThroughputCapacity)	128MBs	FSx file system throughput Capacity. Applicable only when Storage Type chosen is fsx
FSx Endpoint CIDR (FSxEndpointCIDR)	10.0.255.192/26	The IP address range in which the endpoints to access your fsx file system will be created, required only for multi-AZ deployment. Applicable only when Storage Type chosen is fsx

ROSA subscription information:

Parameter label (name)	Default	Description
ROSA Token	<i>Requires input</i>	Update the value with the ROSA Token.

IBM Cloud Pak for Data configuration:

Parameter label (name)	Default	Description
IBM Cloud Pak for Data Entitled Registry User (APIUsername)	cp	Enter the IBM Cloud Pak for Data Username value to access IBM Container Registry.
IBM Cloud Pak for Data Entitled Registry API	—	Enter the IBM Cloud Pak for Data API key to access IBM Container Registry

Parameter label (name)	Default	Description
key Value (APIKey)		
License agreement (LicenseAgreement)	—	I have read and agreed to the license terms for IBM Cloud Pak for Data that were provided to me at time of purchase.
OpenShift project (NameSpace)	zen	The OpenShift project that will be created for deploying Cloud Pak for Data. It can be any lowercase string.
Output S3 Bucket (ICPDDeploymentLogsBucketName)		The name of the S3 bucket where IBM Cloud Pak for Data deployment logs are to be exported. The deployment logs provide a record of the boot strap scripting actions and are useful for problem determination if the deployment fails in some way

IBM Cloud Pak for Data services:

Parameter label (name)	Default	Description
IBM Knowledge Catalog	no	Installs IBM Knowledge Catalog(Watson Knowledge Catalog) service.
Watson Query	no	Installs the Watson Query(Data Virtualization) service.
AnalyticsEngine	no	Installs the Analytics Engine service.
WatsonStudio	no	Installs the Watson Studio service.
WatsonMachineLearning	no	Installs the Watson Machine Learning service.
WatsonAIOpenscale	no	Installs the Watson AI Openscale service.
SPSSModeler	no	Installs the SPSS Modeler service.
CognosDashboardEmbedded	no	Installs the Cognos Dashboard Embedded service.
DataStage	no	Installs the DataStage service.
Db2Warehouse	no	Installs the Db2 Warehouse service.
Db2OLTP	no	Installs the Db2OLTP service.
CognosAnalytics	no	Installs the Cognos Analytics service.

Parameter label (name)	Default	Description
IBM Match 360 with Watson	no	Installs the IBM Match 360 with Watson service.
DecisionOptimization	no	Installs the Decision Optimization service.
BigSQL	no	Installs the BigSQL service.
PlanningAnalytics	no	Installs the Planning Analytics service.
Watsonx Assistant	no	Installs Watsonx Assistant service. Installs Watsonx Assistant. <i>Note: Only single Availability zone is supported for a successful Watsonx Assistant installation. Multi Availability zone is not supported.</i>
Watson Discovery	no	Installs Watson Discovery service.
Watson Speech	no	Installs Watson Speech service.
Manta	no	Installs Manta service. <i>Note: For a successful Manta service installation, IBM Knowledge Catalog service is the pre requisite. Set both parameters Manta and IBM Knowledge Catalog to 'yes' for a successful installation.</i>
OpenPages	no	Installs the OpenPages service.
IBM Db2 DataManagementConsole	no	Installs the IBM Db2 Data Management Console service.
Factsheets	no	Installs the Factsheets service. <i>Note: For a successful installation of the Factsheets service, IBM Knowledge Catalog service or Watson Studio service must have been installed on the cluster.</i>
RStudio	no	Installs the RStudio service.
WatsonPipelines	no	Installs the Watson Pipelines service.

- On the options page, you can [specify tags](#) (key-value pairs) for resources in your stack and [set advanced options](#). When you're done, choose **Next**.

5. On the **Review** page, review and confirm the template settings. Under **Capabilities**, select the check box to acknowledge that the template will create IAM resources.
 6. Choose **Create stack** to deploy the stack.
 7. Monitor the status of the stack. When the status is **CREATE_COMPLETE**, the Cloud Pak for Data cluster is ready.
6. Use the URLs displayed in the **Outputs** tab for the stack to view the resources that were created. The URL for the **ICPDWebClientURL** output key will navigate to the console login page.

Step 5. (Optional) Specifying Services to deploy a Data Fabric Solution

IBM [Data Fabric Solutions](#) (Data Governance & Privacy, Multicloud Data Integration and Data Science and MLOps) are prescribed combinations of Cloud Pak for Data services which solve particular common use cases. You can deploy these solutions using either option 1 or 2 above by specifying the required services within the applicable Cloud Formation Template.

To configure each solution, simply select “yes” for the following CPD services in your Cloud Formation Template.

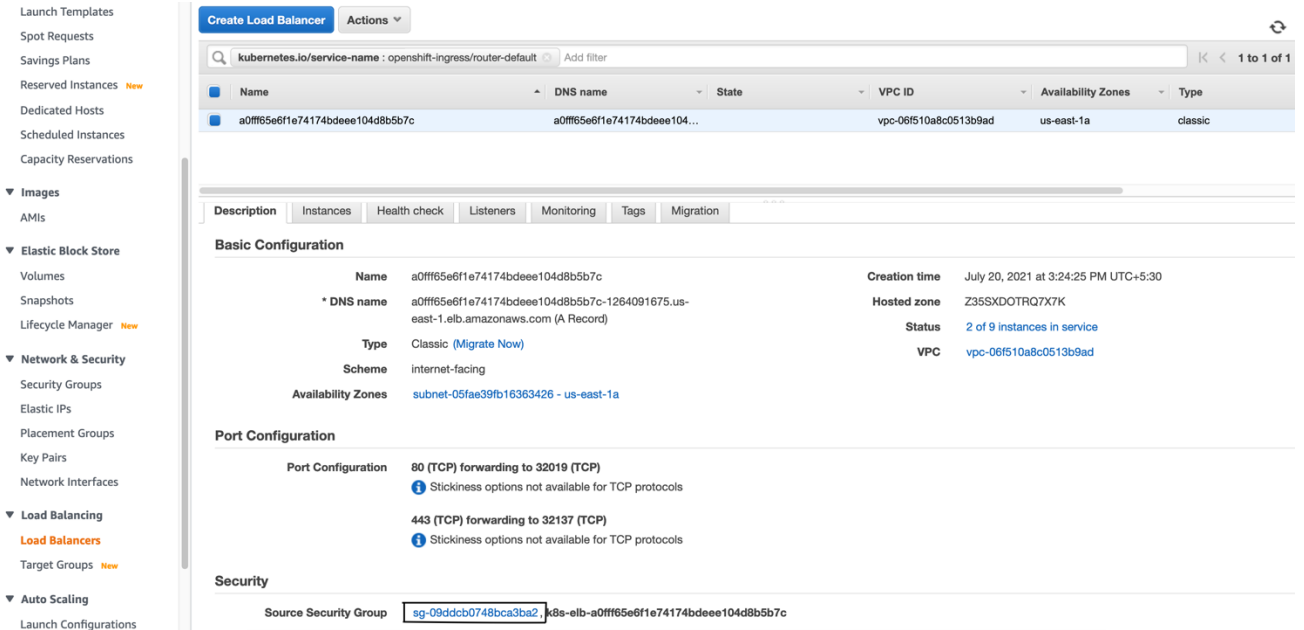
Data Fabric Solution	Services to Select
Data Governance and Privacy	IBM Knowledge Catalog(WatsonKnowledgeCatalog) WatsonQuery IBM Match 360 with Watson
Multicloud Data Integration	IBM Knowledge Catalog(WatsonKnowledgeCatalog) Watson Query DataStage
Data Science and MLOps	WatsonStudio WatsonMachineLearning WatsonAIOpenscale

Step 6. (Optional) Edit the application security group

Optional: You might need to edit the AWS application group to add IP addresses that can access the Cloud Pak for Data web client.

Navigate to Load Balancers on your AWS console and filter on tags, for example *kubernetes.io/service-name: openshift-ingress/router-default*.

1. In Load Balancers, filter and select the security group.



2. Select Security Group and modify the Inbound rules

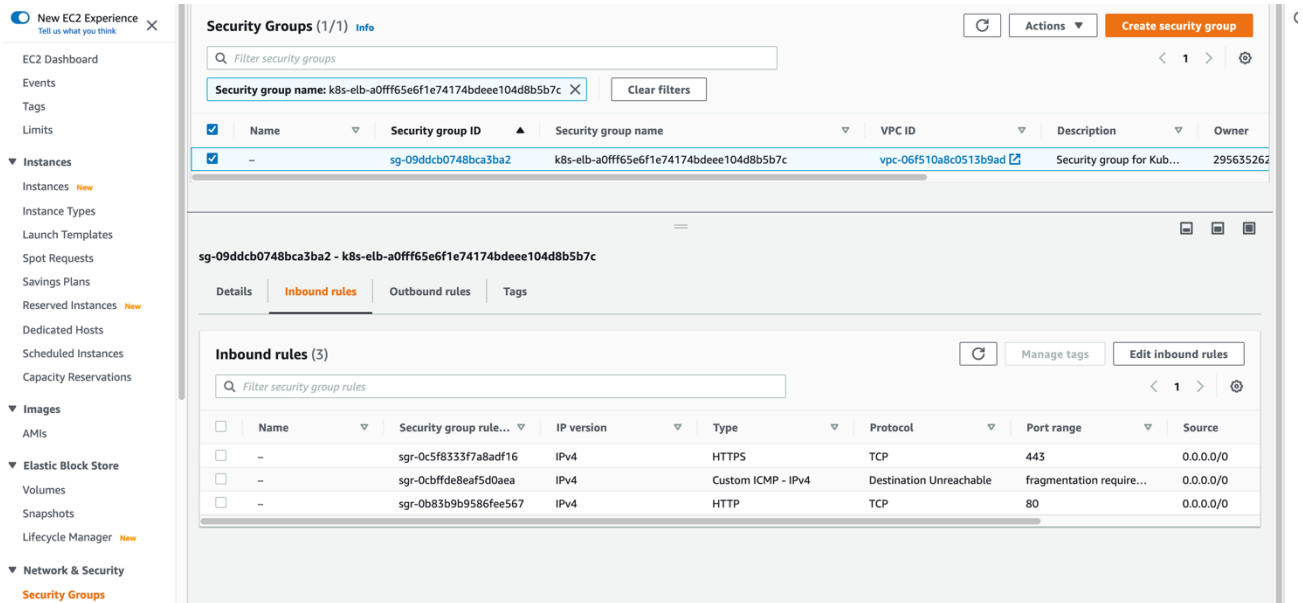


Figure 5: OpenShift node security group

- Choose **Add Rule**, and fill in the rule details. For the rule **Type**, select either HTTP or HTTPS in the drop-down menu. Port 80 or 443 is filled in automatically. Add the network CIDR for the group of IP addresses that you want to permit HTTP or HTTPS access to the proxy nodes. To allow any IP address, use 0.0.0.0/0.

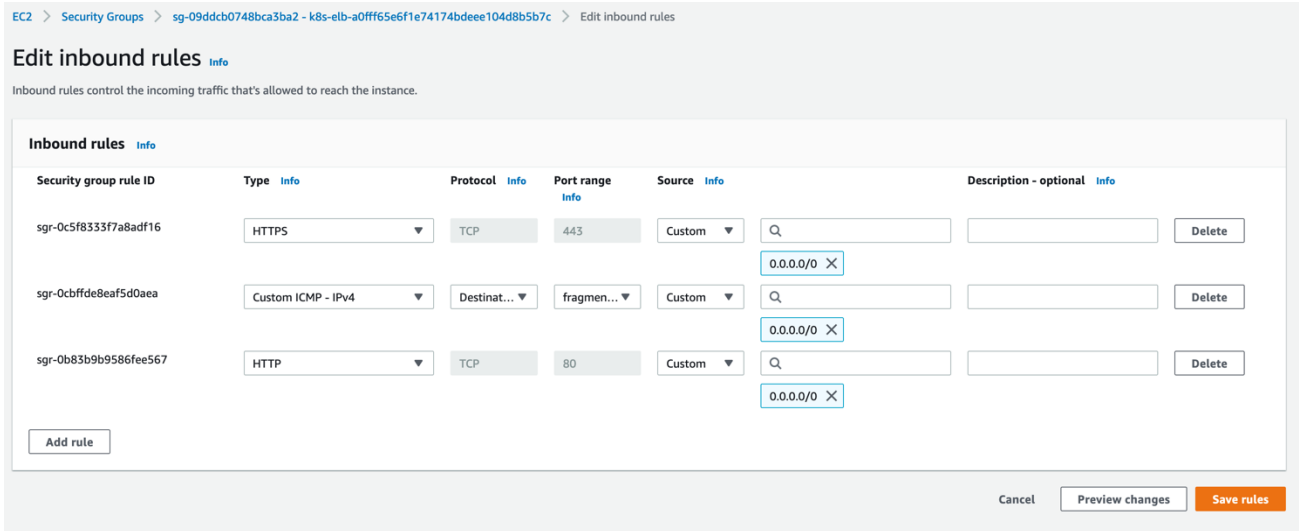


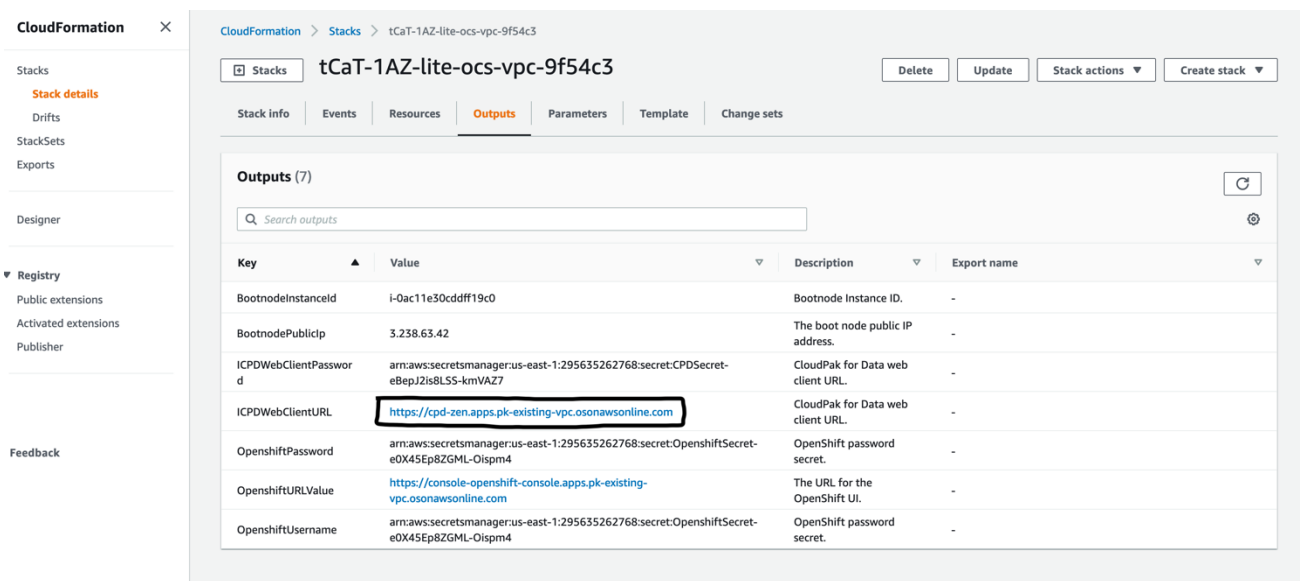
Figure 7: Supplying rule details

- In the rule editor window, choose **Save**.

Step 7. Login to Cloud Pak for Data web client

When the AWS CloudFormation template has successfully created the stack, all server nodes will be running with the software installed in your AWS account. In the following steps, connect to Cloud Pak for Data web client to verify the deployment, and then use the web client to explore Cloud Pak for Data features.

- To access the Cloud Pak for Data web client, first get the console URL from the Cloud Formation Stack output for key ICPDWebClientURL



- Get the Cloud Pak for Data web client user name and password from the Secret Manager with names <stack name>-cp4d-username and <stack name>-cp4d-password. Get the Openshift username

Secret name	Description	Last retrieved (UTC)
MyTestSecret	My test secret created with the CLI	8/2/2022
MySecret2	-	-
CPDSecret-ckeJi7Plyjd	-	-
OpenshiftSecret-xadOWQPnplgf	-	-
AWSCredentialSecret-qIARm3aJuwqh	-	-
mlopsai-CloudPakDataStack-153P29PKIH98C-OpenShift-Username	-	-
mlopsai-CloudPakDataStack-153P29PKIH98C-cp4d-password	-	-
mlopsai-CloudPakDataStack-153P29PKIH98C-OpenShift-Password	-	-
mlopsai-CloudPakDataStack-153P29PKIH98C-cluster-login-command	-	-
mlopsai-CloudPakDataStack-153P29PKIH98C-cp4d-username	-	8/26/2022
AWSCredentialSecret-HVAPFqYpxExx	-	-

Figure 8: OpenShift Secret in Secret Manager

- Click the secret suffixed with “OpenShift-Username” and retrieve the value of the secret. Take a note of the value “OpenShift-Username”. Click the secret suffixed with “OpenShift-password” and retrieve the value of the secret. Take a note of the value of the “OpenShift-password”. Click the secret suffixed with “cp4d-username” and retrieve the value of the secret. Take a note of the value of the “cp4d-username”. Click the secret suffixed with “cp4d-password” and retrieve the value of the secret. Take a note of the value of the “cp4d-password”. Click the secret suffixed with cluster-login-command and retrieve the value of the secret. Take a note of the value of OpenShift cluster login command.

Openshift Username:

Secret value info
Retrieve and view the secret value.

Key/value | Plaintext

cluster-admin

Openshift password:

Secret value info
Retrieve and view the secret value.

Key/value | Plaintext

uCDeV-8Fq5-7qLPx-njWde

Cloud Pak for Data username:

Secret value info
Retrieve and view the secret value.

Key/value | Plaintext

admin

Cloud Pak for Data password:

Secret value info
Retrieve and view the secret value.

Key/value | Plaintext

gJXNPw5CVC3T

Openshift cluster login command:

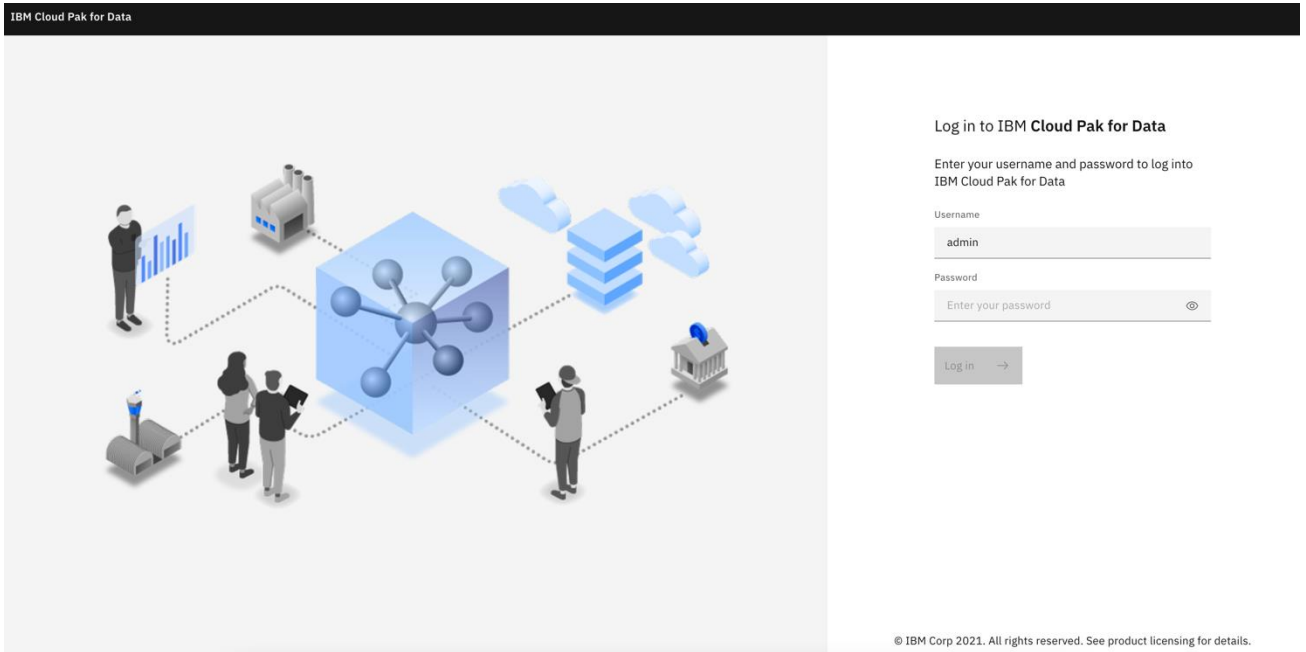
```

Secret value info
Retrieve and view the secret value.
Close Edit

Key/value Plaintext

oc login https://api.mlopsai.gixy.p1.openshiftapps.com:6443 --username cluster-admin --password uCDeV-BFeg5-7qLPx-njWde
    
```

4. Log in to the Cloud Pak for Data web client by using the username and the password from the previous step.



5. Once you log in, the welcome page is displayed.

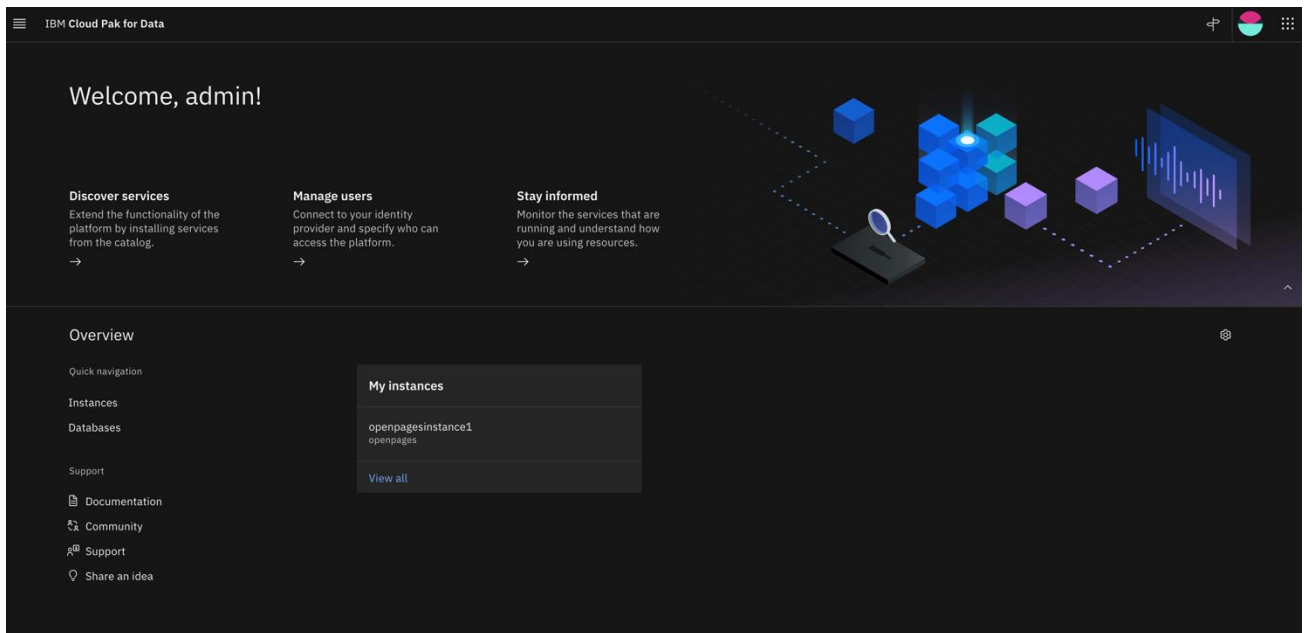


Figure 9: Welcome page for Cloud Pak for Data web client

See [resources](#) on platform features and capabilities. For a list of supported browsers, see [Supported browsers](#).

Step 8. Manage your cluster using the OpenShift Console

- To access the OpenShift Console, go to the OpenShiftURLValue output of the root stack

The screenshot shows the AWS CloudFormation console interface. On the left is a navigation sidebar with options like 'Stacks', 'Stack details', 'Drifts', 'StackSets', 'Exports', 'Designer', 'Registry', and 'Feedback'. The main area displays the details for a stack named 'tCaT-1AZ-lite-ocs-vpc-9f54c3'. The 'Outputs' tab is selected, showing a table of seven outputs. The 'OpenShiftURLValue' output is highlighted with a red box, indicating the URL for the OpenShift console.

Key	Value	Description	Export name
BootnodeInstanceid	i-0ac11e30cddf19c0	Bootnode Instance ID.	-
BootnodePublicIp	3.238.63.42	The boot node public IP address.	-
ICPDWebClientPassword	arn:aws:secretsmanager:us-east-1:295635262768:secret:CPDSecret-eBepJ2is8L5S-kmVAZ7	CloudPak for Data web client URL.	-
ICPDWebClientURL	https://cpd-zen.apps.pk-existing-vpc.oseonawsolnline.com	CloudPak for Data web client URL.	-
OpenShiftPassword	arn:aws:secretsmanager:us-east-1:295635262768:secret:OpenShiftSecret-e0X45Ep8ZGML-Oispm4	OpenShift password secret.	-
OpenShiftURLValue	https://console-openshift-console.apps.pk-existing-vpc.oseonawsolnline.com	The URL for the OpenShift UI.	-
OpenShiftUsername	arn:aws:secretsmanager:us-east-1:295635262768:secret:OpenShiftSecret-e0X45Ep8ZGML-Oispm4	OpenShift password secret.	-

The default OpenShift administrative user and password value is retrieved from the previous steps from the secrets value.

The screenshot shows the 'Tags' section of the AWS CloudFormation console. It includes a search bar and a table of tags. Below the tags, the 'Secret value info' section is expanded, showing the 'cluster-admin' key-value pair. The 'Secret value info' section also includes 'Close' and 'Edit' buttons.

Key	Value
name	mlopsai
aws:cloudformation:stack-name	mlopsai-CloudPakDataStack-153PZ9PKIH9BC
aws:cloudformation:logical-id	ROSAUsername
aws:cloudformation:stack-id	arn:aws:cloudformation:us-east-1:694822775768:stack/mlopsai-CloudPakDataStack-153PZ9PKIH9BC/9e809b10-2477-11ed-bc9d-0a04c9ff81dd

Secret value info
Retrieve and view the secret value.

Key/value: **Plaintext**

cluster-admin

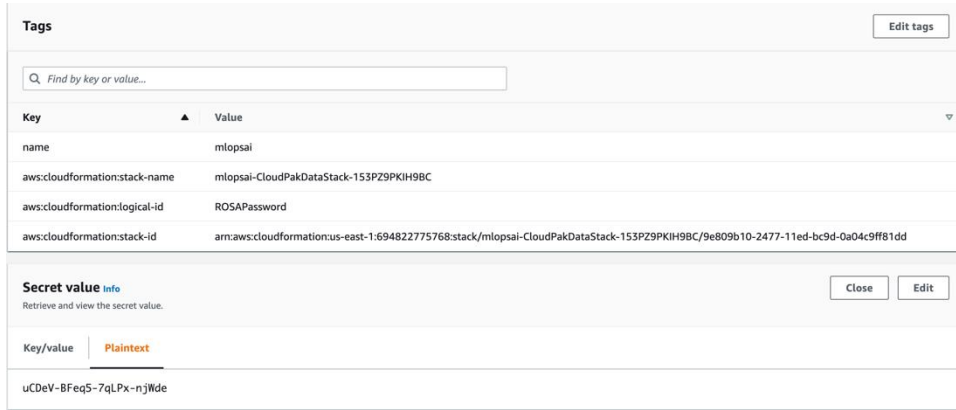
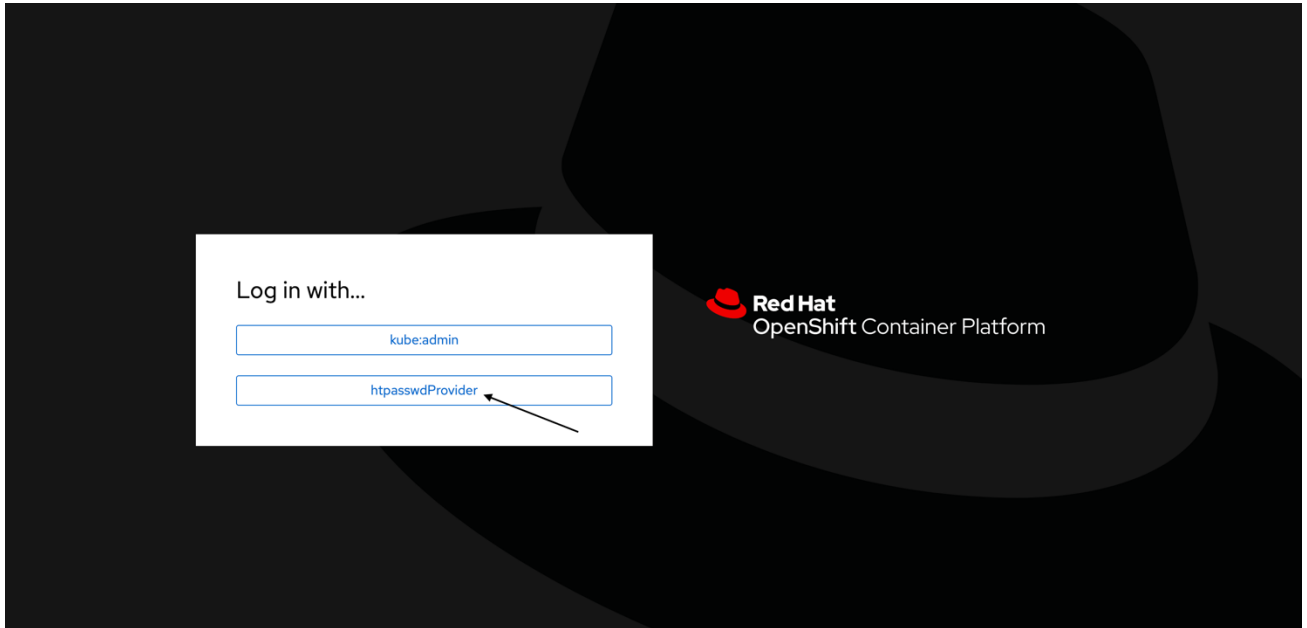


Figure 10.1: Retrieve secret value for console password

- Open the OpenShift Console URL in a browser, select htpasswdProvider at Log in and Login with the username and password from the previous step.



Step 9. (Optional) Provide Boot Node SSH access

The boot node EC2 instance is used for certain command-line cluster administration tasks, such as adding compute nodes. SSH access to the boot node is required for some cluster administrators.

After deployment, you only have access to the boot node. Provide the workstation IP address CIDR as the value of the `BootNodeSecurityGroup` rule.

This section describes the steps to modify the `BootNodeSecurityGroup` inbound rules.

Note : These steps assume access to the AWS CloudFormation console for the IBM Cloud Pak for Data deployment.

- In the AWS Security Groups page, filter name containing `BootNodeSecurityGroup`

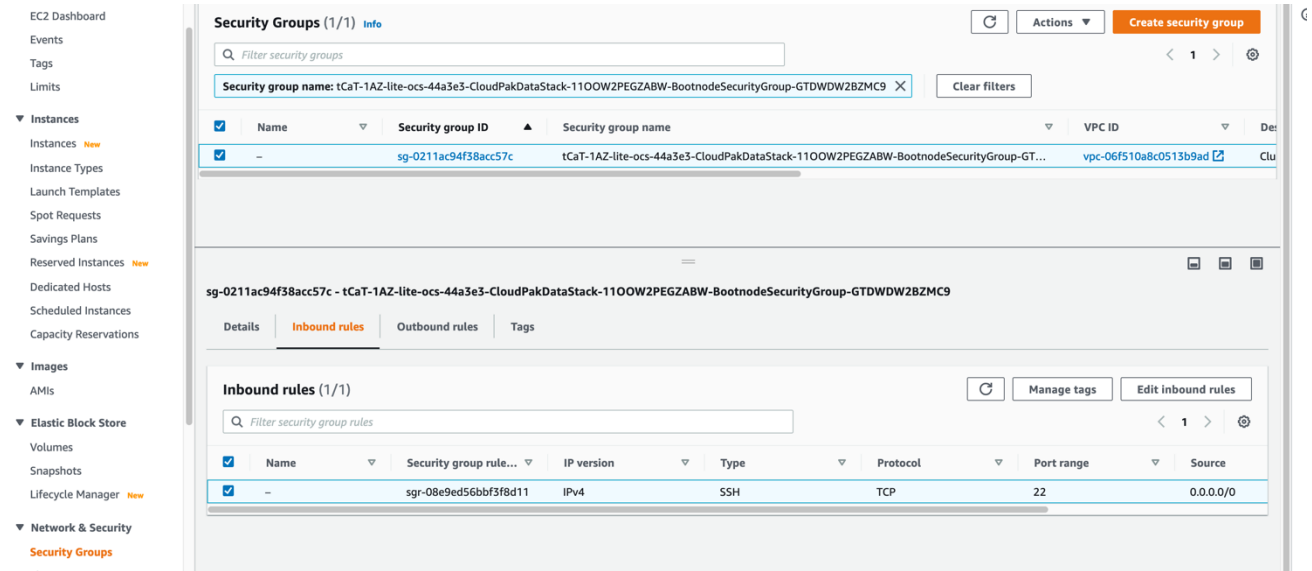


Figure 11: Security Groups

- The security group window displays the ingress rules. Select the **Inbound** tab, and choose **Edit** to bring up the rule editor, choose **Add Rule**, and fill in the rule details. Add the network CIDR for the group of IP addresses that you want to permit SSH access to the boot nodes. To allow any IP address, use 0.0.0.0/0.

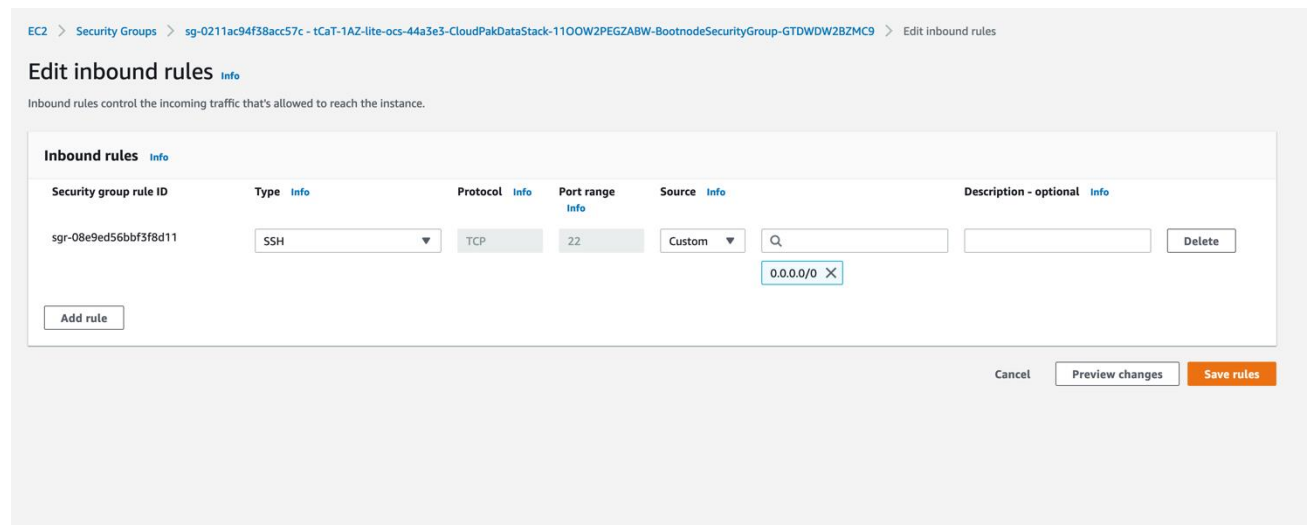


Figure 14: Supplying rule details

- In the rule editor window, choose **Save Rules**.

Accessing the control plane through the Boot Node

The recommended method of SSH access to the OpenShift cluster instances via the bastion host is by using SSH agent forwarding, as in the following Bash instructions:

- Run the command `ssh-add -K <your-key.pem>` to store the key in your keychain. On Linux, you might need to omit the `-K` flag.
- Retrieve the host name of the Boot Node from the Amazon EC2 console.

The screenshot displays the AWS Management Console interface. On the left is a navigation sidebar with categories like EC2 Dashboard, Events, Tags, Limits, Instances, Images, Elastic Block Store, and Network & Security. The main area shows a table of EC2 instances under the heading 'Instances (1/10) Info'. The table columns include Name, Instance ID, Instance state, Instance type, Status check, Alarm status, Availability Zone, and Public IPv4. The first instance, 'fwsghlsetfyifbyondp-bootnode' with ID 'i-050aeeee663bfd861', is highlighted. Below the table, a detailed view for this instance is shown, with tabs for Details, Security, Networking, Storage, Status checks, Monitoring, and Tags. The 'Instance summary' section is expanded, showing the Instance ID, Instance state (Running), Public IPv4 address (3.219.47.21), and Private IPv4 addresses (10.0.142.19).

Name	Instance ID	Instance state	Instance type	Status check	Alarm status	Availability Zone	Public IPv4
fwsghlsetfyifbyondp-bootnode	i-050aeeee663bfd861	Running	i3.large	2/2 checks passed	No alarms	us-east-1a	ec2-3-219-4
fwsghlsetfyifbyondp-crtfk-master-1	i-0bba367e335b761cb	Running	m5.xlarge	2/2 checks passed	No alarms	us-east-1a	-
fwsghlsetfyifbyondp-crtfk-master-0	i-04a447c3ca9ad494d	Running	m5.xlarge	2/2 checks passed	No alarms	us-east-1a	-
fwsghlsetfyifbyondp-crtfk-master-2	i-0b4dd194f6566337a	Running	m5.xlarge	2/2 checks passed	No alarms	us-east-1a	-
fwsghlsetfyifbyondp-crtfk-worker-us-e...	i-0ee3e68b970844188	Running	m5a.4xlarge	2/2 checks passed	No alarms	us-east-1a	-
fwsghlsetfyifbyondp-crtfk-worker-us-e...	i-09d6391ef6bef68ab	Running	m5a.4xlarge	2/2 checks passed	No alarms	us-east-1a	-
fwsghlsetfyifbyondp-crtfk-worker-us-e...	i-00fb1600c8adee0e5	Running	m5a.4xlarge	2/2 checks passed	No alarms	us-east-1a	-
fwsghlsetfyifbyondp-crtfk-workeroc...	i-01d3b1fc93f836c4d	Running	r5.4xlarge	2/2 checks passed	No alarms	us-east-1a	-

Figure 15: Host name of the Boot Node

9. To log in to the bastion host, run

```
$ ssh -I <path-to-private-ssh-key> ec2-user@<bootnode-host-name>
```

10. Run `oc login` to authenticate with OpenShift and verify that services are in a running state:

```
$ oc get pods
```

Scaling up your cluster by adding compute nodes:

RedHat Cluster management url:

```
rosa describe cluster --cluster <cluster_name> | grep Details
```

Scale up worker nodes:

```
$ rosa list machinepools --cluster=<cluster_name>
```

```
$ rosa edit machinepool --cluster=<cluster_name> <machinepool_ID> --replicas=<number>
```

Note : If you choose to scale down your cluster or reduce the number of compute nodes, there is a risk of the cluster becoming unstable because pods will need to be rescheduled. Scaling down the worker nodes is not a recommended option.

Cloud Pak for Data services

You can browse the various services that are available for use by navigating to the [Cloud Pak for Data Service Catalog](#) in Cloud Pak for Data.

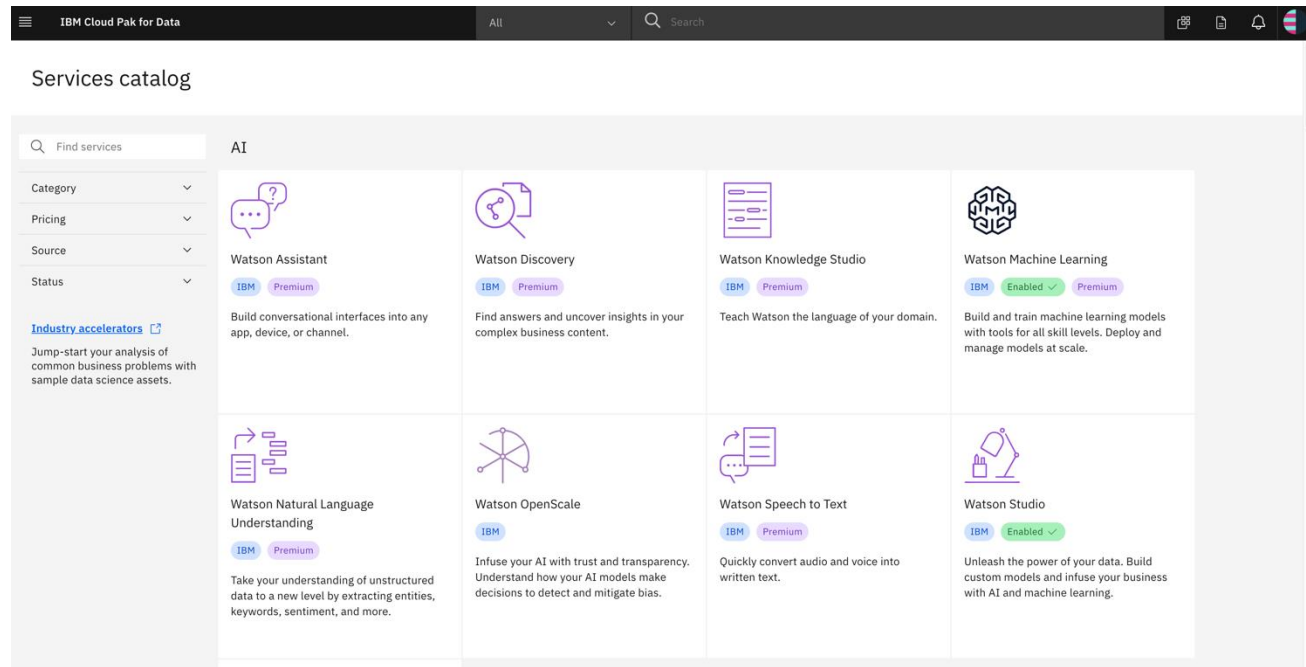


Figure 16: Services catalog page in Cloud Pak for Data

As part of this installation, the control plane is installed by default.

System requirements for the Cloud Pak for Data:

Please refer system requirements from [here](#).

Note: The resources listed are only for the services and does not include the resources for Cloud Pak for Data control plane and foundational services.

Upgrade Cloud Pak for Data Services

See what new features and improvements are available in the [latest release of IBM® Cloud Pak for Data](#).

- Login to your bootnode server as mentioned in [access section](#).
- Follow the [upgrade](#) instructions and upgrade corresponding services

Limitations

- Review the [known issues and limitations](#) for Cloud Pak for Data.

Troubleshooting

Q. I encountered a CREATE_FAILED error when I launched the CF Template

A. If AWS CloudFormation fails to create the stack, we recommend that you relaunch the template with **Rollback on failure** set to **No**. (This setting is under **Advanced** in the AWS CloudFormation console, **Options** page.) With this setting, the stack’s state will be retained and the instance will be left running, so you can troubleshoot the issue. (Look at the log files in %ProgramFiles%\Amazon\EC2ConfigService and C:\cfn\log.)

Important When you set **Rollback on failure** to **No**, you will continue to incur AWS charges for this stack. Make sure to delete the stack when you finish troubleshooting.

For additional information, see [Troubleshooting AWS CloudFormation](#) on the AWS website.

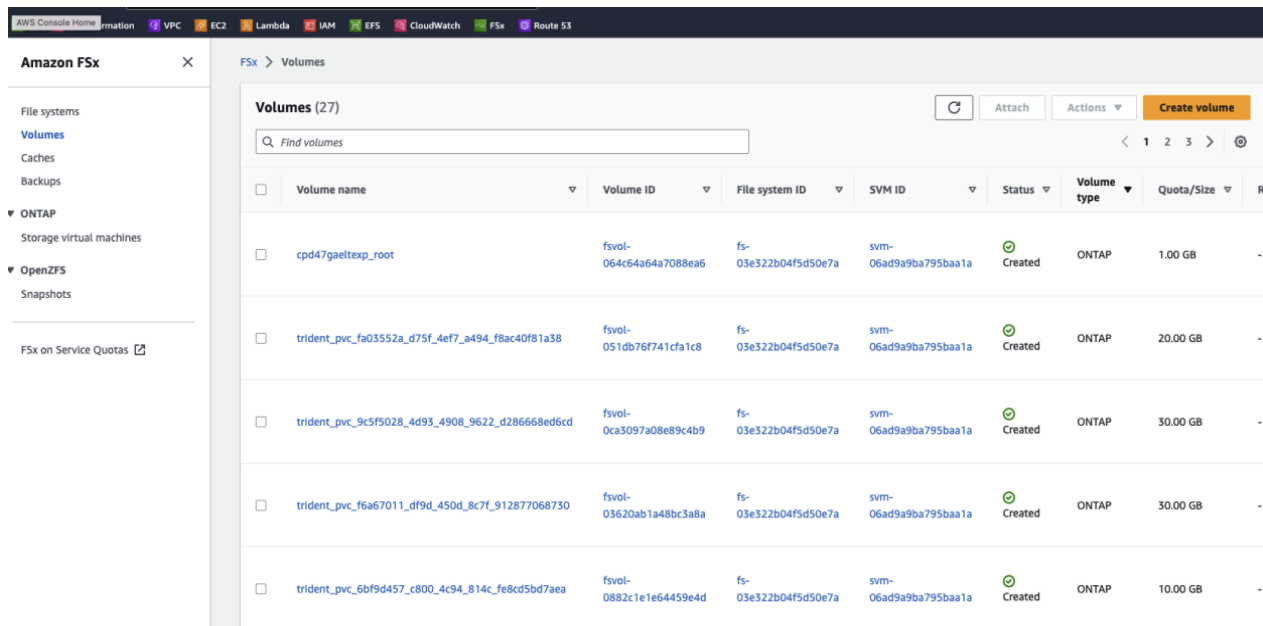
Q. I encountered a size limitation error when I deployed the AWS CloudFormation templates.

A. We recommend that you launch the CF templates from the links in this guide or from another S3 bucket. If you deploy the templates from a local copy on your computer or from a non-S3 location, you might encounter template size limitations when you create the stack. For more information about AWS CloudFormation limits, see the [AWS documentation](#).

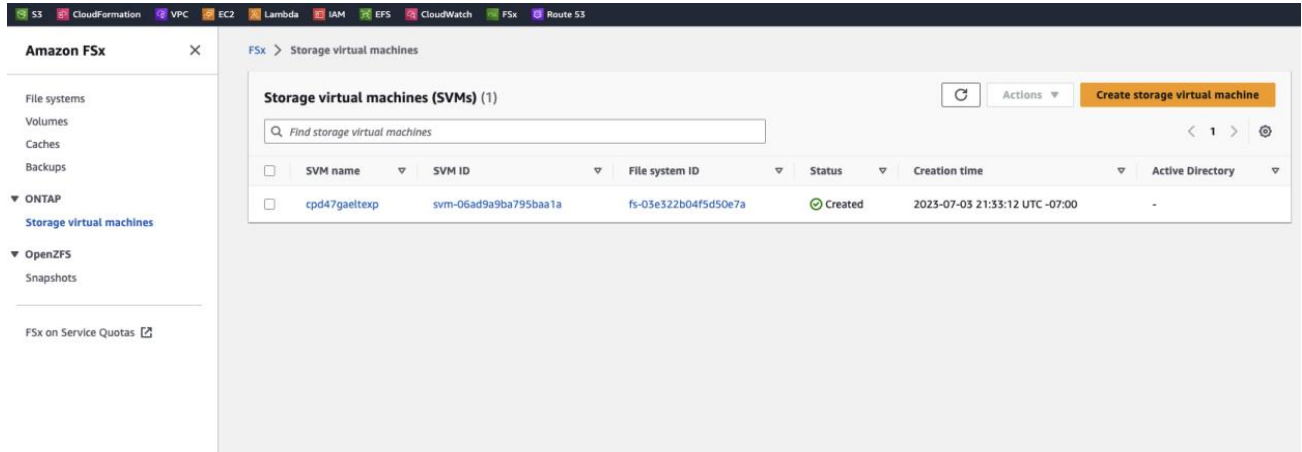
Q. I am not able to delete the stack that I created from the CF Template

A. If any manual changes are done to the resources created from the automation, such as adding new rules to the security group, they must be manually removed for the automation to uninstall successfully. To clean up a deletion failed cluster:
 a) Storage Cleanup: Based on the storage chosen, either EFS-EBS or FSX delete the corresponding storage The file system name prefix would be same as the cluster name. For EFS – Delete the file system with the name as _cpd_efs

For NetApp FSX: a) Delete the volumes corresponding to the file system. The FSX file system name would be your cluster name

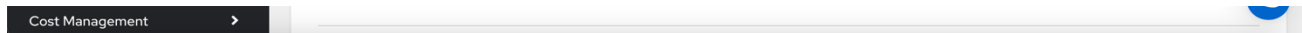


b) Delete the Storage volume machine



c) Delete the NetApp FSX File system

b) ROSA cluster deletion: Navigate to the rosa [console](#), Select View only my clusters & identify the cluster with name same as the cluster name value supplied in the cloud formation cluster name parameter and uninstall the cluster.



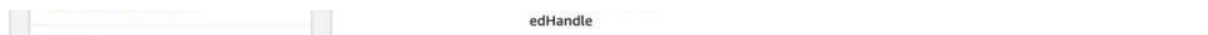
c) Once the cluster uninstall is completed, attempt deletion of cloud formation stack.

Q. The stack creation fails with error Failed to retrieve attribute [Value] for resource [CPDURL]

A. If the Stack creation fails with the error “Failed to retrieve attribute [Value] for resource [CPDURL]: The security token included in the request is invalid (Service: AmazonSSM; Status Code: 400; Error Code: UnrecognizedClientException;”)



The cluster creation is successful, even though the stack creation failed. You can fetch the cluster details OpenshiftURLValue, OpenshiftUsername, OpenshiftPassword , Openshiftlogincommand, ICPDWebClientURL, ICPDWebClientUsername, ICPDWebClientPassword from the Resources



Additional resources

AWS resources

- [Getting Started Resource Center](#)
- [AWS General Reference](#)
- [AWS Glossary](#)

AWS services

- [Amazon EC2](#)
- [Amazon S3](#)

- [Amazon VPC](#)
- [AWS CloudFormation](#)

IBM Cloud Pak for Data documentation

- [IBM Documentation](#)

Redhat OpenShift Service on AWS:

https://docs.openshift.com/rosa/rosa_getting_started/rosa-sts-getting-started-workflow.html

Document revisions

Date	Change	In sections
February 2024	AWS Marketplace CP4D on ROSA BYOL refresh	
July 2024	AWS Marketplace CP4D on ROSA BYOL v5.0.x refresh	