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Welcome to the Cloudbursting Manual for Bright Cluster Manager 9.1.

0.1 About This Manual
This manual is aimed at helping cluster administrators install, understand, configure, and manage the cloud capabilities of Bright Cluster Manager. The administrator is expected to be reasonably familiar with the Administrator Manual.

0.2 About The Manuals In General
Regularly updated versions of the Bright Cluster Manager 9.1 manuals are available on updated clusters by default at /cm/shared/docs/cm. The latest updates are always online at http://support.brightcomputing.com/manuals.

- The Installation Manual describes installation procedures for the basic cluster.
- The Administrator Manual describes the general administration of the cluster.
- The User Manual describes the user environment and how to submit jobs for the end user.
- The Developer Manual has useful information for developers who would like to program with Bright Cluster Manager.
- The Edge Manual describes how to deploy Bright Edge with Bright Cluster Manager.
- The Machine Learning Manual describes how to install and configure machine learning capabilities with Bright Cluster Manager.

If the manuals are downloaded and kept in one local directory, then in most pdf viewers, clicking on a cross-reference in one manual that refers to a section in another manual opens and displays that section in the second manual. Navigating back and forth between documents is usually possible with keystrokes or mouse clicks.

For example: <Alt>-<Backarrow> in Acrobat Reader, or clicking on the bottom leftmost navigation button of xpdf, both navigate back to the previous document.

The manuals constantly evolve to keep up with the development of the Bright Cluster Manager environment and the addition of new hardware and/or applications. The manuals also regularly incorporate customer feedback. Administrator and user input is greatly valued at Bright Computing. So any comments, suggestions or corrections will be very gratefully accepted at manuals@brightcomputing.com.

There is also a feedback form available via Bright View, via the Menu icon, following the click-path:

≡→Help→Feedback Form

0.3 Getting Administrator-Level Support
If the reseller from whom Bright Cluster Manager was bought offers direct support, then the reseller should be contacted.

Otherwise the primary means of support is via the website https://support.brightcomputing.com. This allows the administrator to submit a support request via a web form, and opens up a trouble
ticket. It is a good idea to try to use a clear subject header, since that is used as part of a reference tag as the ticket progresses. Also helpful is a good description of the issue. The followup communication for this ticket goes via standard e-mail. Section 17.2 of the Administrator Manual has more details on working with support.

### 0.4 Getting Professional Services

Bright Computing normally differentiates between

- professional services (customer asks Bright Computing to do something or asks Bright Computing to provide some service), and
- support (customer has a specific question or problem that requires an answer or resolution).

Professional services can be provided after consulting with the reseller, or the Bright account manager.
Introduction

In weather, a cloudburst is used to convey the idea that a sudden flood of cloud contents takes place. In cluster computing, the term cloudbursting conveys the idea that a flood of extra cluster capacity is made available when needed from a cloud computing services provider such as Amazon.

Bright Cluster Manager implements cloudbursting for two scenarios:

1. A “Cluster On Demand”, or a “pure” cloud cluster (chapter 2). In this scenario, the entire cluster can be started up on demand from a state of non-existence. All nodes, including the head node, are instances running in a coordinated manner entirely inside the cloud computing service.

2. A “Cluster Extension”, or a “hybrid” cloud cluster (chapter 3). In this scenario, the head node is kept outside the cloud. Zero or more regular nodes are also run outside the cloud. When additional capacity is required, the cluster is extended via cloudbursting to make additional nodes available from within the cloud.

Chapters 2 and 3 deal with mainly the GUI configuration of the Cluster On Demand and Cluster Extension scenarios.

Chapter 4 looks at mainly command line tools for configuration of the Cluster On Demand and Cluster Extension scenarios, considering mainly AWS.

Chapter 5 looks at Cluster Extension for Azure.

Chapter 6 discusses some miscellaneous aspects of cloudbursting.
Cluster On Demand
Cloudbursting With Azure, AWS or VMware

2.1 Introduction

Cluster On Demand (COD) cloudbursting is when a separate cluster is started up in a cloud, with the cluster head node that manages the cluster also in that cloud. A COD cluster is regarded as an independent virtual cluster (sometimes described as a ‘pure’ cloud cluster), and not an extension of an existing physical cluster. COD can run in Azure (COD-Azure), in AWS (COD-AWS), or in VMware vSphere (COD-VMware).

When the requirements outlined in the sections that follow have been met, COD clusters can be managed (created, deleted, etc.) in the following ways:

- Via the Bright Computing customer portal (Azure and AWS) (section 2.3)
- By using the COD command line tool via a Docker image or a Python package (all cloud platforms) (section 2.4).

Any of the preceding can be used to launch a COD head node in the cloud. Once the head node is running, then compute nodes are managed by using the various management interfaces provided by Bright Cluster Manager running on the head node (section 2.13).

2.2 Requirements For COD Cloudbursting

The high level requirements for COD are:


- a Bright Cluster Manager product key. This key is later activated when the license is installed (Chapter 4 of the Installation Manual) on the head node.

- Credentials for the cloud environment in which the COD cluster is created. This is covered in the following sections.

- For VMware vSphere, some preparation needs to be done by the VMware administrator (section 2.9)
2.2.1 Credentials For Azure

To use Azure, an Azure account subscription is needed from Microsoft. COD cloudbursting requires the following associated Azure credentials to launch:

- tenant ID
- subscription ID
- Client ID
- Client Secret

A CLI-centric way to obtain these credentials requires logging into the Azure web portal using an account that has sufficient privileges. The Azure web bash console is then opened, and the subscription ID can then be listed for the account with:

**Example**

```bash
azure@Azure:~$ az account list --o table

Name  CloudName  SubscriptionId  State  IsDefault
-------  -----------  ----------------  ------  --------
anne    AzureCloud  23748c3e-507b-11e9-a994-fa163e9854eb  Enabled  False
nerds   AzureCloud  b9e22a88-507a-11e9-9352-fa163e9854eb  Enabled  False
```

A service principal (sp) is now created for role-based access control create-for-rbac in Active Directory (ad), and the remaining 3 credentials can then be seen:

**Example**

```bash
azure@Azure:~$ az ad sp create-for-rbac --name my-temp-service-principal-for-fred
Changing "my-temp-service-principal-for-fred" to a valid URI of "http://my-temp-service-principal-for-fred", which is the required format used for service principal names

Retrying role assignment creation: 1/36
Retrying role assignment creation: 2/36

"appId": "dcf8151e-507a-11e9-a104-fa163e9854eb",  ## "Client ID"
"displayName": "my-temp-service-principal-for-fred",
"name": "http://my-temp-service-principal-for-fred",
"password": "bc9f571e-fe4c-43d5-909d-4bc6796eb41",  ## "Client secret"
"tenant": "8cb88849-6e18-4646-b0fa-551a47a31681"  ## Tenant ID
```

The newly-created service principal is added to the desired subscription as a contributor. The value of appId must be used as the value to the --assignee option. This gives the application sufficient permissions for the cluster to run:

**Example**

```bash
azure@Azure:~$ az role assignment create --assignee dcf8151e-507a-11e9-a104-fa163e9854eb --role\Contributor --subscription b9e22a88-507a-11e9-9352-fa163e9854eb
```

"canDelegate": null,
"id": "/subscriptions/b9e22a88-507a-11e9-9352-fa163e9854eb/providers/Microsoft.Authorization/\roleAssignments/1094f75c-507b-11e9-ac8f-fa163e9854eb",
"name": "1094f75c-507b-11e9-ac8f-fa163e9854eb",
"principalId": "2f899334-507b-11e9-b312-fa163e9854eb",
"roleDefinitionId": "/subscriptions/b9e22a88-507a-11e9-9352-fa163e9854eb/providers/"
The Microsoft documentation suggests that using the name instead of the subscription ID should also work. However in the version that was used at the time of writing (May 2019) this did not work, and an error 400 was displayed.

2.2.2 Credentials For AWS
To use AWS, an AWS subscription is needed from Amazon. COD cloudbursting requires the following associated AWS credentials for launch:

- Secret Access Key: Available only once, when first generated, as described at https://docs.aws.amazon.com/general/latest/gr/aws-sec-cred-types.html#access-keys-and-secret-access-keys
- Access Key ID: as described at https://docs.aws.amazon.com/general/latest/gr/aws-sec-cred-types.html#access-keys-and-secret-access-keys
- AWS Account ID, as described at https://docs.aws.amazon.com/general/latest/gr/acct-identifiers.html
- AWS Username: This can be either the AWS account root user (the email address of the root user), or it can be an IAM username with sufficient permissions to launch the cluster.

2.2.3 Credentials For VMware
To use VMware, the following details should be obtained from the VMware administrator:

- vCenter API endpoint address
- vCenter username
- vCenter password
- vCenter resource pool

2.3 COD Via Bright Computing Customer Portal (Azure And AWS)
The customer portal (section 2.2) has a menu option Cluster on Demand. Selecting this displays an input form (figure 2.1).
If this is filled in, then a COD can be launched in AWS or Azure. Some of the options are:

- Cloud provider
- The product key. This can be the existing key, or a new one. Using the existing one for a cluster that is already in use is not normally possible.
- The cluster name. This can be arbitrary.
The SSH access method.

- SSH public key access is recommended, and should then be pasted into the text field. Using key access disables SSH password authentication.
- Alternatively, a password can be set instead. This generates a somewhat random password for SSH password authentication that is not very strong. The password should normally be changed and saved, because brute force password attacks in the AWS and Azure IP address ranges are common.

Selecting AWS as an option presents some extra fields that are appropriate for launching an AWS COD (figure 2.2). How to obtain the values for the AWS keys is discussed in section 2.2. The default values that are in the form for the virtual machine types and sizes will work for small clusters. Other virtual machine types are documented at "https://aws.amazon.com/ec2/instance-types/".
Selecting Azure as an option presents some extra fields that are appropriate for launching an Azure COD (figure 2.3). How to obtain the values for the Azure credentials is discussed in section 2.2. The default values that are in the form for the virtual machine types and sizes will work for small clusters. Other virtual machine types are documented at https://docs.microsoft.com/en-us/azure/virtual-machines/linux/sizes.
Figure 2.3: COD-Azure via customer portal: example inputs

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Form submission begins the COD installation (figure 2.4).

![Figure 2.4: COD via customer portal: deployment in progress](image)

When deployment is completed, an e-mail is sent with the details to the e-mail address that was entered in the form earlier. A final screen comes up if the installation was successful (figure 2.4).

![Figure 2.5: COD via customer portal: finished deploying](image)

### 2.4 COD Via The COD Command Line Tool

There are two options for running the COD command line tool on a standalone PC:

- A Docker image.
- Installing a Python package in a local (virtual) environment.

The Docker instance that runs from the image can be hosted on a standalone PC that is not part of a Bright cluster, or it can be hosted on a Bright node. The Python package can also be installed on a standalone PC or it can be installed on a Bright node. Section 2.4.1 describes the procedure for installing and configuring COD on Docker on a Bright node in more detail. Section 2.4.2 describes the procedure for installing and configuring the COD client using a Python package on a Bright in more detail.

Once the COD client is installed and configured, the next stage is to launch the COD inside the cloud service. There are three cloud services that a COD from Docker can be launched into. These are:
• AWS (Amazon Web Services), made available by Amazon. The CLI utility in the Docker instance that launches the COD is then `cm-cod-aws` (page 16).

• Azure, made available by Microsoft. The CLI utility in the Docker instance that launches the COD is then `cm-cod-azure` (page 13).

• VMware vSphere. The CLI utility in the Docker instance that launches the COD is then `cm-cod-vmware` (page 18).

### 2.4.1 COD Via Docker Image

The following steps are carried out to start up the head node and regular nodes of the COD:

• A Docker host is used to pull the Bright Cluster Manager COD (Cluster On Demand) image from the Docker registry.

• The image is run in a Docker container.

• From within the instance of the image running in the container, a cloudbursting request for a COD is carried out to a cloud service provider.

• When the request completes successfully, a cluster that is running in the cloud is ready for use.

The COD Docker image is typically run from a standalone machine, such as, for example, a laptop that is not part of a Bright cluster. However, launching a COD from a Bright cluster is also possible, and can be carried out as follows:

• Docker is installed in Bright Cluster Manager with `cm-docker-setup` (section 9.1.1 of the *Administrator Manual*), or using the Bright View Docker setup wizard.

• The node that is to run the Docker image is used to pull the image to the node

```bash
[root@bright91 ~]# ssh node001
[root@node001 ~]# module load docker
[root@node001 ~]# docker pull brightcomputing/cod:latest
...  
cac15ba059ef: Pull complete
Digest: sha256:19b263033090e1a70043989decdf3c3870d3def8c2e69b2a85ac293fd7d149ab
Status: Downloaded newer image for brightcomputing/cod:latest
```

• The command line COD tools installed in the container image all have several command line arguments. Instead of the user having to specify many arguments on every invocation of a tool, the options can conveniently be set in configuration files. To provide access to such configuration files it is recommended that the home directory of the user running the tool is mounted into the container instance. It is also recommended to set up the following shell aliases for each of the tools:

```bash
alias cm-cod-aws='docker run --rm -it --network host -v /root:/root brightcomputing/cod:latest cm-cod-aws'
alias cm-cod-azure='docker run --rm -it --network host -v /root:/root brightcomputing/cod:latest cm-cod-azure'
alias cm-cod-vmware='docker run --rm -it --network host -v /root:/root brightcomputing/cod:latest cm-cod-vmware'
```

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In the preceding aliases:

- the `--rm` option ensures that the container instance created to run a command is also cleaned up on completion
- the `-it` flags are required because some commands may present interactive prompts to the user
- the `--network host` option gives the container network access
- the argument to the `-v` flag has the form of `<source>:<destination>`, where
  * `<source>` points to the home directory of the user invoking the command, and
  * `<destination>` is the path where the directory is mounted inside the running container instance. The path of `<destination>` should always be `/root`.

- Once a COD cluster has been created, it is typically accessed using SSH. It is strongly recommended to use key-based authentication instead of password-based authentication. Since the home directory for users is mounted into the container, any existing SSH key pairs (stored in `~/.ssh`) can be used. If no key pair exists, then `ssh-keygen` can be used to create one. To ensure the highest level of compatibility it is recommended to use RSA as the key type and a minimum of 2048 bits.

### 2.4.2 COD Via A Python Package

Instead of running the COD client in a Docker container it is also possible to install and run the client directly on the host system in a Python virtual environment. The client can be run from a Bright cluster as follows:

- A virtual environment is created to install the COD client:

  **Example**

  ```
  [root@bright91 ~]# ssh node001
  [root@node001 ~]# module load python3
  [root@node001 ~]# python3 -m venv .venvs/cod
  [root@node001 ~]# source .venvs/cod/bin/activate
  (cod) [root@node001 ~]#
  ```

- Next, the required COD clients are installed. Possible clients are:

  - `cm-cluster-on-demand-aws`
  - `cm-cluster-on-demand-azure`
  - `cm-cluster-on-demand-vmware`

  For example, the COD client tool for AWS can be installed as follows:

  **Example**

  ```
  (cod) [root@node001 ~]# pip install cm-cluster-on-demand-aws
  ... Successfully installed boto3-1.7.75 botocore-1.10.84 cm-cluster-on-demand-aws-9.1 ...
  ```

  More than one client can be installed.

- After the COD client has been installed, it can be run whenever the virtual environment is activated, without having to install it again:
2.5 COD On Azure Via Command Line

Launching a COD inside Azure is carried out by running `cm-cod-azure` from either the Docker image or the Python package. The `cm-cod-azure` command can take configuration options from one or more configuration files, environment variables, or command line options. More details on this are given in section 2.8.

Typically some of the more static options are configured in a configuration file, while some of the more variable options are specified on the command line.

Online help is also available: for example, running `cm-cod-azure cluster create -h` displays a list of options and explanations for the `cluster create` command.

2.5.1 Minimal Configuration File For COD On Azure

It is recommended to create the following minimal configuration in `~/cm-cluster-on-demand.d/config.ini`:

**Example**

```ini
[azure.credentials]
azure_subscription_id=a5e519b1e-aff9-e839-bc3a-c5d87e9d0d5
azure_tenant_id=2c89c8dd-6b8b-5393-60f4-d876cbe188f
azure_client_id=afe13723-c80a-68e2-9cd0-e95a657106a
azure_client_secret=aiVohwi7OhJ6igim=
azure_location=westeurope

[cluster.create.license]
license_product_key=123456-123456-123456-123456-123456

[cluster.create.password]
ssh_pub_key_path=/root/.ssh/id_rsa.pub
```

The credentials and product key in the preceding example should be replaced with the appropriate values.

2.5.2 Cluster Creation Run With `cm-cod-azure`

An example of a `cm-cod-azure` command that can be run is then:

**Example**

```bash
cm-cod-azure cluster create \ 
    --head-node-type Standard_D1_v2 --head-node-root-volume-size 50 \ 
    --nodes 3 --node-type Standard_D1_v2 \ 
    --name testcluster
```

If all is well, then something similar to the following is displayed (some output elided):

```
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```
Example

```
[root@cod-client ~]# cm-cod-azure cluster create
--head-node-type Standard_D1_v2 --head-node-root-volume-size 50 \
--nodes 3 --node-type Standard_D1_v2 \
--name testcluster
```

09:35:01: INFO: No custom cluster password specified. Using a random password.
Use --log-cluster-password to see it. If you are going to use the Bright View you have to change this password by using cm-change-passwd script (change root password of head node) or simply 'passwd root' command. If this cluster has a high-availability setup with 2 head nodes, be sure to change the password on both head nodes.

09:35:05: INFO: Temporary azure resources will be created in order to verify that the API credentials have the required permissions, this can take a few minutes. You can skip this step by specifying the following flag: '--skip-permission-verifications'

09:35:05: INFO: Cluster Create
```
09:35:05: INFO: Cluster: testcluster
09:35:05: INFO: Image name: bcm-cod-image-9.0-8
09:35:05: INFO: Image date: 2020-08-21 15:10 (38d 18h ago)
09:35:05: INFO: Package groups: none
09:35:05: INFO: Version: 9.0
09:35:05: INFO: Head nodes: 1 (Standard_D1_v2)
09:35:05: INFO: Nodes: 3 (Standard_D1_v2)
09:35:05: INFO: Resource Group: testcluster_cod_resource_group
09:35:05: INFO: Region: westeurope
09:35:05: INFO: Press ENTER to continue and create the cluster.
09:35:05: INFO: Press ctrl+c (or type 'a') to abort. Type 'i' for more info.
```

09:35:45: INFO: Credentials are valid and have read/write authorizations.

09:38:17: INFO: ### stage: Creating resource group testcluster_cod_resource_group
09:38:18: INFO: Creating storage account testclusterstoragerg68u3
09:38:37: INFO: # Progess: 12.0
09:38:37: INFO: ### stage: Server side copy
09:38:59: INFO: ### stage: Server side copy
09:39:03: INFO: # Progess: 12.26

09:49:40: INFO: ### stage: Server side copy
09:49:41: INFO: # Progess: 51.85
09:49:41: INFO: ### stage: Server side copy
09:49:43: INFO: # Progess: 51.98
09:49:43: INFO: ### stage: Server side copy
09:49:45: INFO: Elapsed: 11:08 min
09:50:21: INFO: # Progess: 5
09:50:21: INFO: ### stage: Building deployment template
The cluster can now be logged into by using the SSH keys generated earlier, and using the public IP address shown in the last few lines of the preceding output.

The regular nodes running on Azure are configured for use, but are not powered on. They can be powered on using the `cmsh` or Bright View front ends, just as in a regular cluster.

From `cmsh`, the first cloud node can be powered on with, for example:

```
[testcluster->device]% power on cnode001
```

More details can be found in section 2.13.

### 2.5.3 Listing Clusters With `cm-cod-azure`

The clusters that are running can be listed with the `cluster list` command option:

**Example**

```
[root@cod-client ~]# cm-cod-azure cluster list
+--------------+-----------------------+---------------+------------+-...
| Cluster Name | Head node name        | Public IP     | Location    | ...         |
+--------------+-----------------------+---------------+------------+-...
| testcluster  | testcluster-head-node | 51.145.169.45 | westeurope  | ...         |
+--------------+-----------------------+---------------+------------+-...
```

Since all of the credentials are specified in the configuration file, no further command line options are needed.

### 2.5.4 Cluster Removal With `cm-cod-azure`

A cluster can be removed with a command in the form of: `cluster delete <cluster name>`:

**Example**

```
[root@cod-client ~]# cm-cod-azure cluster delete testcluster
10:10:47: INFO: Deleting resource group(s): testcluster_cod_resource_group
10:10:47: INFO: Proceed? [yes/no]
y
10:10:52: INFO: Started deleting resources for Resource Group 'testcluster_cod_resource_group'
[root@cod-client ~]#
```
2.6 COD On AWS Via Command Line

Launching a COD inside AWS is carried by running \texttt{cm-cod-aws} from either the Docker image or the Python package.

The \texttt{cm-cod-aws} command can take configuration options from one or more configuration files, environment variables, or command line options. More details on this are given in section 2.8.

Typically some of the more static options are configured in a configuration file, while some of the more variable options are specified on the command line.

Online help is also available. For example, running \texttt{cm-cod-aws cluster create -h} displays a list of options and explanations for the \texttt{cluster create} command.

2.6.1 Minimal Configuration File For COD On AWS

Creation of a minimal configuration file in \texttt{~/cm-cluster-on-demand.d/config.ini} is recommended, with the following contents:

Example

```ini
[aws.credentials]
aws_access_key_id=AKIAJAIChAZ70HH1EEGO
aws_secret_key=Oocei6eiieshahG7Ije9Quoud0oo
aws_region=eu-west-1

[cluster.create.license]
license_product_key=123456-123456-123456-123456-123456

[cluster.create.password]
ssh_pub_key_path=/root/.ssh/id_rsa.pub
```

The example credentials and product key should be replaced with the appropriate values.

2.6.2 Cluster Creation Run With cm-cod-aws

An example of a \texttt{cm-cod-aws} command that can be run is then:

Example

```bash
cm-cod-aws cluster create \
    --head-node-type Standard_D1_v2 --head-node-root-volume-size 50 \
    --nodes 3 --node-type Standard_D1_v2 \
    --name testcluster
```

If all is well, then something similar to the following is displayed (some output elided):

Example

```bash
[13:39:59] INFO: No custom cluster password specified. Using a random password. Use --log-cluster-password to see it. If you are going to use the Bright View you have to change this password by using cm-change-passwd script (change root password of head node) or simply ‘passwd root’ command. If this cluster has a high-availability setup with 2 head nodes, be sure to change the password on both head nodes.
```

© Bright Computing, Inc.
INFO: Image date: 2020-08-21 13:44 (39d 0h ago)
INFO: Package groups: none
INFO: Version: 9.0
INFO: Distro: centos7u7
INFO: Head nodes: 1 (t3.medium)
INFO: Head node IP: <auto> (set with --head-node-internal-ip)
INFO: Nodes: 3 (t3.medium)
INFO: Region: eu-west-1
INFO: Key path: /root/.ssh/id_rsa.pub
INFO: Press ENTER to continue and create the cluster.
INFO: Press ctrl+c (or type 'a') to abort. Type 'i' for more info.

INFO: #### stage: Setting up VPC
INFO: #### stage: Creating VPC for on-demand testcluster in eu-west-1...
INFO: #### stage: Adding internet connectivity...
INFO: #### stage: Creating public subnet...
INFO: #### stage: Creating private subnet...
INFO: Created security group for the head node: sg-057c11f4d9857a025
INFO: Created security group for the compute node: sg-06249aedeffc0d50d2d
INFO: #### stage: Creating head node (t3.medium)...
INFO: Public key specified.
INFO: Creating the head node VM instance.
INFO: Created VM i-0d92887ef735f87b1.
INFO: Waiting for head node to be running
INFO: #### stage: Done setting up VPC for on-demand testcluster.
INFO: #### stage: Starting the head node
INFO: #### stage: Waiting for the head node to start
INFO: #### stage: Assigning public IP to the head node (use
'--no-head-node-assign-public-ip' to skip)
INFO: Elastic IP assigned: 54.217.104.57.
INFO: #### stage: Waiting for cloud-init to start (use
'--cloud-init-timeout 0' to skip)
INFO: Waiting for cloud-init to finish on the cluster testcluster (by trying to
connect to 54.217.104.57:8081).
INFO: #### stage: Deployment of cluster: testcluster finished successfully.
INFO: Script completed.
INFO: Time it took: 04:12
INFO: SSH string: 'ssh root@54.217.104.57'
54.217.104.57 testcluster
INFO: Head node ID: i-0d92887ef735f87b1
[root@cod-client ~]#
At this point, the head node running on AWS is ready for use. It can be accessed via SSH, as suggested in the SSH string line of the preceding output.

The regular nodes running on AWS are configured for use, but are not powered on. They can be powered on using the cmsh or Bright View front ends, just as in a regular cluster.

From cmsh, the first cloud node can be powered on with, for example:

```
[testcluster->device]% power on cnode001
```

More details can be found at section 2.13.

### 2.6.3 Listing Clusters With cm-cod-aws

The clusters that are running can be listed with the command option `cluster list`:

**Example**

```
[root@cod-client ~]# cm-cod-aws cluster list
14:16:44: INFO: Listing clusters in region eu-west-1
+----------------+-----------------------+---------------------+---------------+...
| Cluster Name   | VPC ID                | Head node ID         | Public IP     | ...
+----------------+-----------------------+---------------------+---------------+...
| testcluster    | vpc-019dacc0877bfd71a | i-0d92887ef735f87b1 | 54.217.104.57 | ...
+----------------+-----------------------+---------------------+---------------+...
```

Since all of the credentials are specified in the configuration file, no further command line options are needed.

### 2.6.4 Cluster Removal With cm-cod-aws

A cluster can be removed with a command in the form of: `cluster delete <cluster name>`:

**Example**

```
[root@cod-client ~]# cm-cod-aws cluster delete testcluster
14:18:57: INFO: This will destroy VPCs for testcluster, continue?
14:18:57: INFO: Proceed? [yes/no]
y
14:19:00: INFO: Stopping instances for VPCs on-demand testcluster
14:19:00: INFO: Listing instances...
14:19:00: INFO: Issuing instances termination requests...
14:19:00: INFO: Waiting until instances terminated...
14:20:31: INFO: Destroying VPC on-demand testcluster
14:20:31: INFO: Deleting subnets...
14:20:32: INFO: Deleting route tables...
14:20:32: INFO: Detaching and deleting gateways...
14:20:33: INFO: Flushing permissions...
14:20:34: INFO: Deleting security groups...
14:20:35: INFO: Deleting VPC...
14:20:35: INFO: Done destroying VPC on-demand testcluster
[root@cod-client ~]#
```

### 2.7 COD On VMware Via Command Line

Launching a COD inside VMware is carried out by running `cm-cod-vmware` from either the Docker image or the Python package.

The `cm-cod-vmware` command can take configuration options from one or more configuration files, environment variables, or command line options. More details on this are given in section 2.8.
Typically some of the more static options are configured in a configuration file, while some of the more variable options are specified on the command line. Online help is also available: for example, running `cm-cod-vmware cluster create -h` displays a list of options and explanations for the `cluster create` command.

### Minimal Configuration File For COD On VMware

Creation of a minimal configuration file in `~/cm-cluster-on-demand.d/config.ini` is recommended, with the following contents:

**Example**

```ini
[vmware.credentials]
vmware_address = vcenter.mycompany.com
vmware_username = "bob@vsphere.local"
vmware_password = "SomeSecretWithCapsAndNumbersEtc123!"
vmware_resource_pool = "bob-cod-resource-pool"

[cluster.create.license]
license_product_key=123456-123456-123456-123456-123456

[vmware.network]
vdsswitch_name = DSwitch01
externalnet_vdportgroup = DSwitch01-externalnet
internalnet_vlan_ids = 400-499

[vmware.cluster.create]
ssh_pub_key_path = ~/.ssh/id_rsa.pub
```

The example credentials and product key should be replaced with the appropriate values. In most cases the contents of this configuration file should be supplied to the COD user by the VMware administrator. Additionally, details on setting up VMware for COD are given in section 2.9.

### Cluster Creation Run With `cm-cod-vmware`

An example of a `cm-cod-vmware` command that can be run is then:

**Example**

```
$ cm-cod-vmware cluster create
   --head-node-number-cpus 2 --head-node-memory-size 2048 --head-node-root-volume-size 25
   --node-number-cpus 2 --node-memory-size 2048 --node-root-volume-size 10
   --name testcluster
```

If all is well, then something similar to the following is displayed (some output elided):

**Example**

```
--log-cluster-password to see it. If you are going to use the Bright View you have to change
this password by using cm-change-passwd script (change root password of head node) or simply
‘passwd root’ command. If this cluster has a high-availability setup with 2 head nodes, be
sure to change the password on both head nodes.
[13:25:43] INFO: Please wait...
```

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At this point, the head node running on VMware is ready for use. It can be accessed via SSH, as suggested in the SSH string line of the preceding output.

The regular nodes running on VMware are configured for use, but are not powered on. They can be powered on using the cmsh or Bright View front ends, just as in a regular cluster.

From cmsh, the first cloud node can be powered on with, for example:

```
[testcluster->device]% power on cnode001
```

More details can be found in section 2.13.

### 2.7.3 Listing Clusters With cm-cod-vmware

The clusters that are running can be listed with the cluster list command line option:

**Example**

```
[root@cod-client ~]# cm-cod-vmware cluster list
14:43:31: INFO: Listing clusters...
+-----------------+--------------+---------------------------+-------------+-...
| Cluster Name    | IP           | Created (age)             | Head status | ...
+-----------------+--------------+---------------------------+-------------+-...
| testcluster     | 10.2.180.3   | 2020-09-30 13:26 (1h 16m) | poweredOn   | ...
+-----------------+--------------+---------------------------+-------------+-...
```
Since all of the credentials are specified in the configuration file, no further command line options are needed.

### 2.7.4 Cluster Removal With cm-cod-vmware

A cluster can be removed with a command in the form of: `cluster delete <cluster name>`:

**Example**

```bash
[root@cod-client ~]# cm-cod-vmware cluster delete testcluster
14:45:38: INFO: Will delete clusters: testcluster
14:45:38: INFO: Proceed? [yes/no] y
14:45:41: INFO: Attempting to power off VMs: testcluster
14:45:41: INFO: Deleting VMs: testcluster
14:45:42: INFO: Deleting networks: testcluster
14:45:42: INFO: Done.
[root@cod-client ~]#
```

### 2.8 COD Client Configuration And Command Line Options

All COD clients (cm-cod-azure (section 2.5), cm-cod-aws (section 2.6), and cm-cod-vmware (section 2.7)) have a similar command line structure. They can take many command line arguments. All of those arguments can also be specified in configuration files, or as environment variables. Options specified as environment variables override options specified in configuration files. Options specified on the command line override options defined as environment variables as well as options defined in configuration files.

#### 2.8.1 Command Line Structure

The command line structure is similar for all the different COD clients. Each client offers a number of top-level commands, which each offer a number of sub-level commands. The top-level and sub-level commands are always the first two positional arguments. Each top-level as well as sub-level commands can have several optional arguments.

The syntax is indicated by:

```
cm-cod-{aws, vmware, azure} [top-level command [sub-level command]] options
```

**Command Line Help**

To find out which commands and options are available, the `--help` or `-h` option can be used. The following example shows how to display the top-level commands and options for the cm-cod-aws client:

**Example**

```bash
[root@cod-client ~]# cm-cod-aws --help
usage: cm-cod-aws [-h] [--config CONFIG] [--no-system-config] [-v]
            [--show-configuration] [--log-file LOG_FILE] [--version]
            {cluster,c,cluster create,cc,cluster list,cl,cluster delete,cd,cr,cremove,image,i,image list,il,instancetype,config} ...
```

Cluster-on-demand by Bright Computing

**positional arguments:**

```
{cluster,c,cluster create,cc,cluster list,cl,cluster delete,cd,cr,cremove,image,i,image list,il,instancetype,config}
```
cluster (c) Manage clusters
cluster create (cc) Create a new cluster
cluster list (cl) List all of the recognized clusters (VPCs)
cluster delete (cd, cr, cremove) Delete all resources in a cluster
image (i) Manage images
image list (il) List available Bright head node images
instancetype Instance types
config Configuration operations

optional arguments:
-h, --help show this help message and exit
--config CONFIG, -c CONFIG
--no-system-config
-v, -vv, -vvv
--show-configuration
--log-file LOG_FILE
--version

Command Line Help At Other Levels
The --help option can also be used to get the available options for a specific top-level command. For example:

cm-cod-aws cluster --help

The --help option can also be used to get the available options for a specific sub-level command. For example:

cm-cod-aws cluster create --help.

Command Line Parameter Explanations With --explain
More detailed information about a specific parameter can be obtained using the --explain flag. The following example shows how to find out more about the --nodes parameter of the cluster create command of cm-cod-aws. The last parameter is specified as nodes, not --nodes.

Example

[root@cod-client ~]# cm-cod-aws cluster create --explain nodes

NAME

   nodes (cm-cod-aws cluster create --nodes <value> | -n <value>)

DESCRIPTION

   The amount of cloud nodes to configure for a cluster. The nodes are not powered on automatically.

   Its default value is 5.

NAMESPACE AND COMMANDS

   It is used in the following namespaces and commands

   -[cluster.create.nodes:nodes]
     '-[cluster.create:nodes]
     '-[aws.cluster.create:nodes]  (command: cm-cod-aws cluster create)

HOW TO CONFIGURE

   On the Command Line:

   cm-cod-aws cluster create --nodes 5 [..]
2.8 COD Client Configuration And Command Line Options

cm-cod-aws cluster create -n 5 [..]

As Environment Variable:
COD_NODES=5 cm-cod-aws cluster create [..]

In a Config File:
[cluster.create.nodes]
nodes=5

The detailed information includes what the default for the parameter is (if applicable), how to specify the parameter as an environment variable, and how to include it in a configuration file.

2.8.2 Configuration Files

By default, configuration files for setting up the COD are searched for in the following locations, and in the following sequence. Settings found earlier in the sequence are overwritten by settings later on in the sequence.

• /etc/cm-cluster-on-demand.ini
• /etc/cm-cluster-on-demand.conf
• /etc/cm-cluster-on-demand.d/*
• ~/cm-cluster-on-demand.ini
• ~/cm-cluster-on-demand.conf
• ~/cm-cluster-on-demand.d/*
• a file location specified on the command line. For example, a file mycodsettings can be accessed using the --config option of the COD client:

Example

[fred@bright91 ~]$ cm-cod-vmware --config mycodsettings

Typically, the administrator sets up configuration options in one of the first 3 locations, and the regular user modifies the options or adds other options in one of the last 4 locations. The configuration files are formatted as .ini files.

Viewing The Configuration File Options

A dump of the existing configuration can be viewed using the config dump command, for example:

   cm-cod-vmware config dump

To check what options have been applied, and their sequence, the log to STDOUT can be viewed if the -v|--verbose option has been applied.

A list of configuration options for a command can be seen with the --show-configuration option, for example (output elided):

Example
$ cm-cod-azure cluster create --show-configuration

<table>
<thead>
<tr>
<th>option</th>
<th>value</th>
</tr>
</thead>
<tbody>
<tr>
<td>accept_eula</td>
<td>False (default)</td>
</tr>
<tr>
<td>access_validation</td>
<td>True (default)</td>
</tr>
<tr>
<td>advanced_help</td>
<td>False (default)</td>
</tr>
<tr>
<td>ask_to_confirm_cluster_creation</td>
<td>True (default)</td>
</tr>
<tr>
<td>azure_client_id</td>
<td>'12345678-1234-1234-1234-123456789012' (file: /etc/cm-cluster-on-demand.d/config.ini)</td>
</tr>
<tr>
<td>azure_client_secret</td>
<td>XXXXXXXXXXXXXXX (file: /etc/cm-cluster-on-demand.d/config.ini) # use ... to uncover</td>
</tr>
<tr>
<td>azure_location</td>
<td>'westeurope' (file: /etc/cm-cluster-on-demand.d/config.ini)</td>
</tr>
<tr>
<td>azure_subscription_id</td>
<td>'12345678-1234-1234-1234-123456789012' (file: /etc/cm-cluster-on-demand.d/config.ini)</td>
</tr>
<tr>
<td>azure_tenant_id</td>
<td>'12345678-1234-1234-1234-123456789012' (file: /etc/cm-cluster-on-demand.d/config.ini)</td>
</tr>
<tr>
<td>cluster_password</td>
<td>None (default)</td>
</tr>
</tbody>
</table>

The table also indicates from which file a specific setting was taken.

Arguments to the `cm-cod-{aws,azure,vmware}` commands override the equivalent configuration file settings. This means that the configuration file settings of a working configuration can be used as a default template, and modifications to the template can conveniently be carried out via command line.

### Setting Configuration File Options And Corresponding Arguments

The configuration files are formatted as .ini files, which can contain multiple sections. The `--explain` flag can be used to find out how a certain command line parameter could be defined in a configuration file. Thus in the earlier example, in the case of the `cm-cod-aws cluster create --node` parameters, defining it as a configuration file would end up with a file looking like this:

```ini
[cluster.create.nodes]
 nodes=5
```

---

### 2.9 Preparing VMware vSphere For COD

#### 2.9.1 Introduction

Cluster On Demand (COD) can be used to deploy virtual Bright clusters inside a VMware vSphere environment. The VMware vSphere environment is typically local. Before a vSphere environment can be used by the COD client software, the administrator needs to ensure several requirements are met. In addition, several preparation tasks must be completed. The requirements and tasks are described in the following sections.

#### 2.9.2 Requirements

COD for VMware has been validated against VMware vSphere 6.7 Enterprise Plus. In order to run COD clusters on a vSphere environment the following requirements have to be met:

- A range of VLAN IDs should be configured in the physical switches. These are used for the internal networks of the virtual clusters.
- A virtual distributed switch must be used to host one distributed port group per virtual cluster, to serve as the internal network for that cluster.
- All virtual head nodes are connected to a pre-defined distributed port group which should provide DHCP leases and internet access.
- VMware's DRS should be enabled so that virtual nodes can automatically be distributed across the hypervisors.
- For each COD user a resource pool should be created, in order to contain the VMs of that user.

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2.9 Preparing VMware vSphere For COD

2.9.3 Networking

Each COD cluster consists of a single head node VM and a number of compute node VMs. As is usual in a Bright cluster, the head node VM has two network connections. The first connection is for the COD cluster’s internal network, which connects the head node VM to the compute node VMs. The second connection is for the external connection, which is used to access the COD cluster through, for example, SSH or Bright View.

Currently, Bright Cluster Manager supports two different methods for deploying the two virtual networks:

1. **vSphere method**: In a vSphere deployment the head node VM is connected to two distributed port groups. These two port groups are referred to as the *internal port group* and the *external port group*.

2. **NSX-T method**: In an NSX-T deployment the head node VM is connected to two segments.

More details on configuring Bright for VMware on NSX-T are given in section 2.10.

When the COD client is used to create a COD cluster using vSphere networking, it expects the external port group to already exist. The internal port group is created as part of the cluster creation process. This means that the vSphere administrator should first create a virtual distributed switch which should span all the hypervisors that are to be hosting COD VMs. On that switch, the external port group should be created. The virtual head nodes should be able to obtain a DHCP lease on this port group and it should provide IP connectivity to the internet, as well as to the client machine running the COD client. Typically this means the external port group is connected to the local corporate/campus network. Outbound internet access is required in order to activate the Bright license during cluster creation.

The name of the virtual distributed switch as well as the name of the external port group should be included in the COD client configuration file as follows:

**Example**

```
[vmware.network]
vdswitch_name = DSwitch01
externalnet_vdportgroup = DSwitch01-externalnet
```

The internal port groups, one per COD cluster, are created by the COD client as part of the cluster creation process. Each internal port group requires a unique VLAN ID. Since vSphere networking is not able to dynamically allocate VLAN IDs, a range of VLAN IDs need to be allocated. These VLAN IDs should be provisioned in the physical switches, on the ports connected to the hypervisors that are to run the COD VMs.

If multiple users should be able to create COD clusters, then the VLAN ID range should be manually divided between those users. Each user should set their allowed VLAN ID range in their COD configuration as shown in the example that follows.

**Example**

```
[vmware.network]
internalnet_vlan_ids = 400-499
```

The range is inclusive, so that, for example, 10-19 creates ten clusters.

2.9.4 Accounts, Privileges, Roles And Permissions

From a security point of view, there are several ways in which (groups of) users are involved in using COD for VMware. For the purpose of this documentation a few roles are defined here. These roles should not be confused with actual roles defined in vSphere, which are covered later. Also, some of the following roles might not be needed, or may overlap, depending on how an organization is using COD for VMware.
• **VMware Administrator**: The VMware administrator has full administrative access to the vSphere environment. The VMware administrator sets up the networking infrastructure required for COD (described in the previous section) as well as the COD images available to the COD Users (described in the next section).

• **COD User**: The COD User can use the COD client to create, list and remove their own COD clusters.

• **COD Cluster Administrator**: The COD cluster administrator has full root access to the virtual COD cluster. The CMDaemon running on the COD clusters head node VM has a set of VMware credentials it uses to manage (create, power on/off, delete) compute node VMs. So by extension, the COD cluster administrator has access to those VMware credentials as well.

• **End User**: The End User has non-privileged access to the COD clusters. End users are typically the ones running the actual workloads on the COD clusters. They do not have access to any VMware credentials.

**Administrator Only**

In the most simple form COD could be used by just the VMware administrator. In this case the VMware administrator also takes on the roles of the COD user and the COD cluster administrator. The VMware administrator uses the COD client to manage (create, list, delete) COD clusters and provides end users access to the virtual clusters to run their workloads.

In this scenario no specific VMware privileges or permissions need to be set up. By default the COD client injects the VMware credentials used to create the COD clusters into the CMDaemon that runs on the virtual head nodes. This implies that anyone with root access to the head nodes effectively has administrative access to the vSphere environment.

**Multiple COD Users**

A more common use case is where there are multiple COD users who each manage their own set of COD clusters. In this scenario a resource pool has to be created for each COD User. The COD Users each have their own set of VMware credentials. The permissions for the COD Users are set up in such a way that they can only manage the COD clusters in their own resource pool.

Again, by default the COD users credentials used to create the COD cluster are injected into the CMDaemon running on the COD clusters head node VM. So, anyone with root level access to those head nodes has access to the vSphere environment with the privileges granted to the COD User.

Although the COD users are limited to manage only their own VMs, the vSphere permission model is not capable of restricting the COD users to just their own networking resources. As part of the COD cluster creation, the COD client needs to create the internal port group (covered earlier) for the COD cluster. Because of this the COD users need permissions to manage port groups. Due to limitations in vSphere’s permission model the COD users are able to create port groups with VLAN IDs they should not be using. They can also remove port groups that belong to other COD users’ clusters.

If configured correctly, the COD client prevents COD users from doing such operations. But those restrictions cannot be enforced in vSphere. This implies that there has to be a trust between the VMware administrator and the COD users, as well as between COD users, to not abuse their networking access.

The first step for this scenario is to set up a user group called **COD-Users**, which should contain all the COD users.

Next, the following roles should be defined in the vSphere UI, with the privileges assigned accordingly:
<table>
<thead>
<tr>
<th>Role name</th>
<th>Privileges</th>
<th>Action</th>
<th>Subaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>COD-Content-Library-Read</td>
<td>Content Library</td>
<td>Download files</td>
<td></td>
</tr>
<tr>
<td>COD-Assign-Tags</td>
<td>vSphere Tagging</td>
<td>Assign/Unassign vSphere Tag</td>
<td></td>
</tr>
<tr>
<td>COD-Manage-Networks</td>
<td>dvPort group</td>
<td>Create</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Delete</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Assign network</td>
<td></td>
</tr>
<tr>
<td>COD-Allocate-Datastore-Space</td>
<td>Datastore</td>
<td>Allocate space</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Resource</td>
<td>Assign VM to resource pool</td>
<td></td>
</tr>
<tr>
<td></td>
<td>vApp</td>
<td>Import</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Virtual machine</td>
<td>Change Configuration</td>
<td></td>
</tr>
<tr>
<td>COD-Manage-VMs</td>
<td></td>
<td>Edit Inventory</td>
<td>Remove</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Interaction</td>
<td>Configure CD media</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Power off</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Power on</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Reset</td>
</tr>
</tbody>
</table>

Finally, the permissions need to be set up as detailed in the table below:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Role</th>
<th>User/Group</th>
<th>Propagate to children?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Permissions</td>
<td>COD-Content-Library-Read</td>
<td>COD-Users</td>
<td>yes</td>
</tr>
<tr>
<td>vCenter</td>
<td>COD-Assign-Tags</td>
<td>COD-Users</td>
<td>no</td>
</tr>
<tr>
<td>Network Folder*</td>
<td>COD-Manage-Networks</td>
<td>COD-Users</td>
<td>yes</td>
</tr>
<tr>
<td>Datastore</td>
<td>COD-Allocate-Datastore-Space</td>
<td>COD-Users</td>
<td>no</td>
</tr>
<tr>
<td>Resource pool</td>
<td>COD-Manage-VMs</td>
<td>user</td>
<td>yes</td>
</tr>
</tbody>
</table>

* The COD-Manage-Networks role should be assigned to a network folder which contains the distributed switch that hosts the COD networks. It is very important to use a network folder, even if it contains just a single switch. Assigning the role directly to the switch does not work.

**Using Alternative vSphere Credentials For Head Node CMDaemon**

By default the COD client injects the vSphere credentials used to create the COD cluster into the CMDaemon that runs on the virtual clusters head node. The CMDaemon makes use of those credentials to manage the compute nodes of the virtual cluster.

As described in the previous section, there are some limitations in the vSphere permissions model.
when it comes to networking. It is not possible to grant the rights to create/delete port groups, which is needed to create COD clusters, but at the same time limit to which port groups VMs can be attached.

Since someone with root access to the virtual head node has access to the vSphere credentials stored in CMDaemon, that user can use those credentials to create a VM and attach it to another port group.

To mitigate this, it is possible to inject alternative credentials into the head node CMDaemon. To set up this mode of operation in the vSphere client UI, it is recommended to first create an additional user group called COD-CMDaemon. For each virtual cluster that requires isolation, a separate vSphere user should be created and added to the COD-CMDaemon group.

Next, the administrator needs to create a role that allows the new user to attach new VMs to the internal net. The administrator must also make a small modification to the COD-Manage-Networks role, adding the Modify Permission privilege. It should now look like:

<table>
<thead>
<tr>
<th>Role name</th>
<th>Privileges</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>COD-Assign-Network</td>
<td>Network</td>
<td>Assign network</td>
</tr>
<tr>
<td></td>
<td>Permissions</td>
<td>Modify permission</td>
</tr>
<tr>
<td>COD-Manage-Networks</td>
<td>dvPort group</td>
<td>Create</td>
</tr>
<tr>
<td></td>
<td>Network</td>
<td>Delete</td>
</tr>
<tr>
<td></td>
<td>Assign network</td>
<td></td>
</tr>
</tbody>
</table>

The permissions for the new COD-CMDaemon group and users should be configured as detailed in the following table:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Role</th>
<th>User/Group</th>
<th>Propagate to children?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Permissions</td>
<td>COD-Content-Library-Read</td>
<td>COD-CMDaemon</td>
<td>yes</td>
</tr>
<tr>
<td>Datastore</td>
<td>COD-Allocate-Datastore-Space</td>
<td>COD-CMDaemon</td>
<td>no</td>
</tr>
<tr>
<td>Resource pool</td>
<td>COD-Manage-VMs</td>
<td>CMAdaemon user</td>
<td>yes</td>
</tr>
</tbody>
</table>

This is in addition to the permissions defined in the previous section.

When creating the cluster, the alternative credentials for CMDaemon have to be passed to the COD client. And the client should be instructed to set up permissions that assign the COD-Assign-Network role to those credentials, on the clusters internal port group. As with any configuration option these can be put in a configuration file or passed via the command line or as environment variables. The example that follows uses the command line options:

**Example**

```
[alice@bright91 ~]$ cm-cod-vmware cluster create \
  --cmd-vmware-username eng_cluster1_cmaemon@vsphere.local \
  --cmd-vmware-password somethingLong \
  --internalnet-role COD-Assign-Network \
  ...
```

### 2.9.5 COD Image Management

COD clusters are deployed using images, which are stored in the content library on the local vSphere environment. So, before any COD cluster can be created, the vSphere administrator needs to create a content library, named Bright COD Images by default.

After creating the content library, one or more COD images should be installed. The images are made available in the Bright Computing online image repository. The default repository is located on the West Coast of the United States. An alternative mirror is located in Europe. Since the images are of a considerable size, selecting the closest mirror may improve download speed. The creation time of a virtual cluster does not depend on which mirror is selected.
No extra options are required to use the default US mirror. However, to use the European mirror, the following parameter should be appended to the example commands:

```
--root-manifest https://support.brightcomputing.com/imagerepo/repo-eu.yaml
```

To list which images are available from the Bright Computing online image repository, the administrator can run the `image repo-list` command (some output removed for clarity):

**Example**

```
[root@cod-client ~]# cm-cod-vmware image repo-list [--root-manifest URL]
+-------------------+----------+----------+-----------+-------------+---------+--------+
| ImageID:Revision | Head(GB) | Node(GB) | Distro    | BCM Version | Created | Public |
+-------------------+----------+----------+-----------+-------------+---------+--------+
| centos7u8-9.1:1  | 6.0      | 1.57     | centos7u8 | 9.1         | 1w ago  | True   |
| centos8u2-9.1:1  | 6.0      | 1.57     | centos8u2 | 9.1         | 1w ago  | True   |
+-------------------+----------+----------+-----------+-------------+---------+--------+
```

To install a particular image, it can be selected via image ID, distribution and/or version. For example, to install the latest CentOS 8 update 2 image:

**Example**

```
[root@cod-client ~]# cm-cod-vmware image install --distro centos8u2  
--content-library-name "Bright COD Images" [--root-manifest URL]
```

```
+-----------------------+--------------+----------+-----------+-------------+-------------+--------+
| Image name            | Image type   | Size(GB) | Distro    | BCM Version | Created     |
+-----------------------+--------------+----------+-----------+-------------+-------------+--------+
| bcmh-centos8u2-9.1-1 | Head node    | 6.0      | centos8u2 | 9.1         | 1w 15h ago  |
| bcmn-centos8u2-9.1-1 | Compute node | 1.57     | centos8u2 | 9.1         | 1w 15h ago  |
+-----------------------+--------------+----------+-----------+-------------+-------------+--------+
```

```
12:57:58: INFO: About to install these images
12:57:58: INFO: Proceed? [yes/no]
y
13:01:38: INFO: Tagging image
13:15:48: INFO: Tagging image
```

Images installed in the local content library can be listed with the `image list` command (some output removed):

**Example**

```
[root@cod-client ~]# cm-cod-vmware image list
+------------------+----------+----------+-----------+-------------+-------------+--------+
| ImageID:Revision | Head(GB) | Node(GB) | Distro    | BCM Version | Created     | Public |
+------------------+----------+----------+-----------+-------------+-------------+--------+
| centos8u2-9.1:1  | 6.0      | 1.57     | centos8u2 | 9.1         | 1w 15h ago  | True   |
+------------------+----------+----------+-----------+-------------+-------------+--------+
```

By default the `image list` command displays only the latest revision of each distribution/version combination. To include older revisions, the `--all-revisions` flag can be added:

**Example**

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30 Cluster On Demand Cloudbursting With Azure, AWS or VMware

To remove an image, it is recommended to specify the image ID for the image:

Example

```
[root@cod-client ~]# cm-cod-vmware image delete centos8u2-9.1:1
```

```
To remove an image, it is recommended to specify the image ID for the image:
```

2.10 Using NSX-T To Manage COD VMware Networks

Each COD cluster consists of a single head node VM and a number of compute node VMs. As is usual in a Bright cluster, the head node VM has two network connections.

- The first connection is for the COD cluster’s internal network, which connects the head node VM to the compute node VMs.
- The second connection is for the external connection, which is used to access the COD cluster through, for example, SSH or Bright View.

In an NSX-T deployment the internal and external networks are created using NSX-T segments. The following subsections discuss how to configure NSX-T, vSphere, and the COD client for NSX-T networking.

2.10.1 Requirements

Brightfor VMware has been validated against VMware vSphere 6.7 Enterprise Plus and VMware NSX-T Data Center 3.1. In order to run COD clusters in a vSphere environment using NSX-T networking, the following requirements must be met:

- A vSphere environment, as discussed in section 2.9.
- An NSX-T Data Center deployment containing an overlay transport zone that contains the hypervisors from the vSphere environment.
- An edge deployment, to provide external connectivity to the COD cluster head nodes.

2.10.2 Configuring NSX-T

When COD VMware is used to deploy clusters with NSX-T networking, the COD client expects the external network segment to exist in the overlay transport zone. The external network segment is used to access the head node of COD clusters. This means that the network segment needs to be part of
2.11 Using The AWS EC2 Management Console

a routed network. More information on how to create and configure routed segments is available in the VMware NSX-T Data Center Administration Guide, available from https://docs.vmware.com/en/VMware-NSX-T-Data-Center/index.html

2.10.3 Configuring vSphere
Configuring vSphere is covered in section 2.9. If all COD VMware clusters are to be deployed using NSX-T networks then section 2.9.3 may be skipped. However, in case of either a mix of vSphere and NSX-T clusters, or a combination of vSphere port groups and NSX-T segments in a single COD cluster, both vSphere and NSX-T networking must be configured.

If there are multiple COD users defined, as described in section 2.9.4, then COD-Users need to have the COD-Assign-Network role set up on the data center level. This permission is needed so that the COD users can connect the VMs to the segments which are deployed in the data center. This means that in addition to the roles and permissions in 2.9.4, the permissions should be set up as detailed in the following table:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Role</th>
<th>User/Group</th>
<th>Propagate to children?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Datacenter</td>
<td>COD-Assign-Network</td>
<td>COD-Users</td>
<td>yes</td>
</tr>
</tbody>
</table>

2.10.4 Configuration And Use Of The COD Client
Before deploying a cluster with NSX-T networking, the COD client must be reconfigured. The recommended approach is to add this to the COD client configuration file as follows:

Example

```
[vmware.network]
externalnet_network = externalnet-segment
transport_zone = aaaaaaaa-aaaa-aaaa-aaaa-aaaaaaaaaaaa

[vmware.credentials]
nsx_address = nsx-manager.mycompany.com
nsx_username = admin
nsx_password = AdminPassword!
```

The configuration is added to the already existing configuration as discussed in sections 2.7.1 and 2.9.3. The transport zone ID in the NSX-T manager can be found via the clickpath System → Fabric → Transport Zones which displays the overlay transport zone.

A cluster with NSX-T segments for the internal and external network can be created by adding the following additional command line options to the cm-cod-vmware command:

Example

```
(alice@bright91 ~)$ cm-cod-vmware cluster create \
--internalnet-network-backend nsx \
--externalnet-network-backend nsx 
... 
```

2.11 Using The AWS EC2 Management Console
The recommended way of managing COD is using Bright View via its public IP address, or by using cmsh via the head node (section 2.11.5). This section (section 2.11) describes how the Amazon management console can also be used, to manage some AWS aspects of the instance.

A login is possible from https://console.aws.amazon.com/console/ by using the e-mail address and password of the associated AWS root account, or AWS IAM user account.

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The head node instance can be watched and managed without Bright Cluster Manager in the following ways.

2.11.1 Status Checking Via Instance Selection From Instances List

Clicking the Instances menu resource item from the navigation pane opens up the “Instances” pane. This lists instances belonging to the account owner. An instance can be marked by ticking its checkbox. Information for the selected instance is then displayed in the lower main pane (figure 2.6).

![Figure 2.6: The EC2 Instances List](image)

System (Amazon machine infrastructure) and instance (instance running under the infrastructure) reachabilities are similarly shown under the neighboring “Status Checks” tab (figure 2.7).
2.11 Using The AWS EC2 Management Console

2.11.2 Acting On An Instance From The AWS EC2 Management Console

An instance can be marked by clicking on it. Clicking the Actions button near the top of the main center pane, or equivalently from a right-mouse-button click in the pane, brings up a menu of possible actions. These actions can be executed on the marked instance, and include the options to Start, Stop or Terminate the instance.

2.11.3 Connecting To An Instance From The AWS EC2 Management Console

A marked and running instance can have an SSH connection made to it.

As in the Azure case, for most users this means running `ssh` to the public IP address as suggested at the end of the AWS COD cluster creation run (section 2.6.2. This is assuming the private ssh key that was generated by the `ssh-keygen` command in the container is used for the ssh connection, which may mean that copying it out of the container is needed.

2.11.4 Viewing The Head Node Console

The head node takes about 2 minutes to start up. If, on following the instructions, an SSH connection cannot be made, then it can be worth checking the head node system log to check if the head node has started up correctly. The log is displayed on right-clicking on the “Actions” button, selecting the Instance Settings sub-menu, and selecting the “Get System Log” menu item (figure 2.8). A successful start of the system generates a log with a tail similar to that of figure 2.8.

Figure 2.7: Reachability Status For An EC2 Instance

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2.11.5 Security Group Configuration To Allow Access To The Head Node Via \texttt{cmsh} Or Bright View

Amazon provides a security group to each instance. By default, this configures network access so that only inbound SSH connections are allowed from outside the cloud. A new security group can be configured, or an existing one modified, using the \texttt{Edit details} button in figure 2.9. Security groups can also be accessed from the navigation menu on the left side of the EC2 Management Console.

**COD With AWS: Access With Bright View:**

The security group defined by Amazon for the head node can be modified by the administrator to allow remote connections to CMDaemon running on the head node (figure 2.9).
To allow only a specific network block to access the instance, the network from which remote connections are allowed can be specified in CIDR format.

By default, port 8081 is open on the head node to allow Bright View (section 2.4 of the Administrator Manual) to connect to the head node. This is because the Bright View back end, which is CMDaemon, communicates via port 8081.

**COD With AWS: Access With A Local cmsh:**
The security group created by Amazon by default already allows inbound SSH connections from outside the cloud to the instance running in the cloud, even if the incoming port 8081 is blocked. Launching a cmsh session within an SSH connection running to the head node is therefore possible, and should work without lag.

### 2.12 Using The Azure Dashboard

For Azure, as is the case for AWS, the cluster is normally expected to be managed via Bright View or cmsh. Sometimes when carrying out some special configurations, there may be a need to manage the cluster objects directly via the portal at https://portal.azure.com. This requires an Azure login and password, which opens up the Azure dashboard, and allows the objects to be viewed and managed.

For example, the virtual machines of the COD can be viewed and managed via the Virtual machines resource (figure 2.10), and the virtual networks associated with the COD nodes can similarly be viewed and managed via Virtual networks resource.
Figure 2.10: Viewing Virtual Machines In A Cluster On Demand In Azure

Some items that may be useful when accessing the portal:

- An overview of the COD head node is possible via the clickpath:
  Home → Virtual machines → <head node> → Overview

- Boot process diagnostics can be viewed using the clickpath:
  Home → Virtual machines → <head node> → Boot diagnostics → Serial log

- A serial console can be accessed via the clickpath:
  Home → Virtual machines → <head node> → Serial console

  The file /etc/ssh/sshd_config should have the parameter ChallengeResponseAuthentication set to yes, and the service restarted, for serial console login to work.

2.13 COD: Cloud Node Start-up

Cloud nodes must be explicitly started up. This is done by powering them up, assuming the associated cloud node objects exist. The cloud node objects are typically specified in the cm-cod-aws or cm-cod-azure script which is run in the Docker instance. In the preceding example the cloud node objects are cnode001 and cnode002.

However, more cloud node objects can be created if needed after the scripts have run. The maximum number that may be created is set by the license purchased.

Large numbers of cloud node objects can be created with Bright Cluster Manager as follows:

- In Bright View they can conveniently be cloned via the clickpath:
  Devices → Cloud Nodes → <cloud node> ↓ Clone → <number>

- In cmsh a large number of cloud node objects can conveniently be created with the “foreach --clone” command instead, as described in section 4.2.

After creation, an individual cloud node, <cloud node>, can be powered up from within Bright View via the clickpath:

Devices → Cloud Nodes → <cloud node> ↓ Power → On

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As with regular non-cloud nodes, cloud nodes can also be powered up from within the device mode of cmsh. The initial power status (section 4.1 of the Administrator Manual) of cloud nodes is FAILED, because they cannot be communicated with. As they start up, their power status changes to OFF, and then to ON. Some time after that they are connected to the cluster and ready for use. The device status (as opposed to the power status) remains DOWN until it is ready for use, at which point it switches to UP:

Example

```
[head1->device]% power status
cloud .................... [ FAILED ] cnode001 (Cloud instance ID not set)
cloud .................... [ FAILED ] cnode002 (Cloud instance ID not set)
No power control ...... [ UNKNOWN ] head1
[head1->device]% power on -n cnode001
cloud .................... [ ON ] cnode001
[head1->device]% power status
cloud .................... [ OFF ] cnode001 (pending)
cloud .................... [ FAILED ] cnode002 (Cloud instance ID not set)
No power control ...... [ UNKNOWN ] head1
[head1->device]% power on -n cnode002
cloud .................... [ ON ] cnode002
[head1->device]% power status
cloud .................... [ ON ] cnode001 (running)
cloud .................... [ OFF ] cnode002 (pending)
No power control ...... [ UNKNOWN ] head1
[head1->device]% !ping -c1 cnode001
ping: unknown host cnode001
[head1->device]% status
head1 .................... [ UP ]
node001 .................. [ UP ]
node002 .................. [ DOWN ]
[head1->device]% !ping -c1 cnode001
PING cnode001.cm.cluster (10.234.226.155) 56(84) bytes of data.
64 bytes from cnode001.cm.cluster (10.234.226.155): icmp_seq=1 ttl=63 time=3.94 ms
```

Multiple cloud nodes can be powered up at a time in cmsh with the "power on" command using ranges and other options (section 4.2.3 of the Administrator Manual).

2.13.1 COD: IP Addresses In The Cloud

- The IP addresses assigned to cloud nodes on powering them up are arbitrarily scattered over the 10.0.0.0/8 network and its subnets
  - No pattern should therefore be relied upon in the addressing scheme of cloud nodes
- Shutting down and starting up head and regular cloud nodes can cause their IP address to change.
  - However, Bright Cluster Manager managing the nodes means that a regular cloud node re-establishes its connection to the cluster when it comes up, and will have the same node name as before.

2.14 COD With AWS: Optimizing AWS For High Performance Computing (HPC)

Optimization of cloud nodes for HPC in AWS is discussed in section 3.5.
Cluster Extension Cloudbursting

Cluster Extension cloudbursting ("hybrid" cloudbursting) in Bright Cluster Manager is the case when a cloud service provider is used to provide nodes that are in the cloud as an extension to the number of regular nodes in a cluster. Thus, the head node in a Cluster Extension configuration is always outside the cloud, and there may be some non-cloud-extension regular nodes that are outside the cloud too.

Cluster Extension cloudbursting can burst into a cloud that is running within:

- AWS (CX-AWS). This is described in Chapters 3 and 4 of the Cloudbursting Manual.
- Azure (CX-Azure). This is described in Chapter 5 of the Cloudbursting Manual.

Requirements

Cluster Extension cloudbursting requires:

- An activated cluster license.

One does not simply cloudburst right away in a Cluster Extension configuration. The license must first be made active, or the attempt will fail.

A check on the state of the license can be carried out with:

Example

[root@bright91 ~]# cmsh -c "main; licenseinfo"
License Information
-----------------------------------------------
Licensee /C=US/ST=NY/L=WS/O=Bright Mordor/OU=Mt. Doom/CN=Bright 9.1 Cluster
Serial Number 54750
Start Time Mon Oct 16 01:00:00 2017
End Time Fri Dec 31 23:59:00 2038
Version 7.0 and above
Edition Advanced
Pre-paid Nodes 100
Pay-per-use Nodes yes
Max Accelerator Nodes 80
Max OpenStack Nodes 70
Node Count 6
Allow edge sites Yes
Accelerator Node Count 6
OpenStack Node Count 0
MAC Address / Cloud ID FA:16:3E:85:C7:62

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The value of End Time, Pre-paid Nodes, and Pay-per-use Nodes in the preceding license should be checked. Pre-paid nodes are nodes that may be started without incurring any additional charges. Pay-per-use nodes are nodes that incur additional charges when started. Both pre-paid and pay-per-use can be on-premise or off-premise. That is, both kinds can be used for cluster extension cloudbursting.

If activation is indeed needed, then simply running the `request-license` command with the product key should in most cases provide activation. Further details on activating the license are given in Chapter 4 of the Administrator Manual.

- An Amazon account, if the cloud provider is Amazon.
- An Azure account, if the cloud provider is Microsoft Azure.
- An open UDP port.

By default, this is port 1194. It is used for the OpenVPN connection from the head node to the cloud and back. To use TCP, and/or ports other than 1194, the Bright Computing knowledgebase at http://kb.brightcomputing.com can be consulted using the keywords "openvpn port".

Outbound SSH access from the head node is also useful, but not strictly required.

By default, the Shorewall firewall as provided by Bright Cluster Manager on the head node is configured to allow all outbound connections, but other firewalls may need to be considered too.

- A special proxy environment configuration setting, if an HTTP proxy is used to access the AWS or Azure APIs.

The proxy environment configuration is carried out using the `ScriptEnvironment` directive (page 778 of the Administrator Manual), which is a CMDaemon directive that can be set and activated (page 761 of the Administrator Manual).

For example, if the proxy host is `my.proxy` and accepting connections on port 8080 with a username `my` and password `pass`, then the setting can be specified as:

```
ScriptEnvironment = { "http_proxy=http://my:pass@my.proxy:8080", \
"https_proxy=http://my:pass@my.proxy:8080", "ftp_proxy=http://my:pass@my.proxy:8080" }
```

**Steps**

Cluster Extension cloudbursting uses a cloud director. A cloud director is a specially connected cloud node used to manage regular cloud nodes, and is described more thoroughly in section 3.2. Assuming the administrator has ownership of a cloud provider account, the following steps can be followed to launch Cluster Extension cloud nodes:

1. The cloud provider is logged into from Bright View, and a cloud director is configured (section 3.1).
2. The cloud director is started up (section 3.2).
3. The cloud nodes are provisioned from the cloud director (section 3.3).

The cloud nodes then become available for general use by the cluster.

**Cluster Extension Cloudbursting With A Hardware VPN**

Bright Cluster Manager recommends, and provides, OpenVPN by default for Cluster Extension cloudbursting VPN connectivity. If there is a wish to use a hardware VPN, for example if there is an existing hardware VPN network already in use at the deployment site, then Bright Cluster Manager can optionally be configured to work with the hardware VPN. The configuration details can be found in the Bright Computing knowledgebase at http://kb.brightcomputing.com by carrying out a search on the site using the keywords "cloudbursting without openvpn".

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Cluster Extension Cloudbursting Logging
All AWS logging goes to the CMDaemon log in /var/log/cmdaemon. The CL0UD tag in the log is used to indicate cloud-related operations.

3.1 Cluster Extension With AWS: The Bright View Cluster Extension Wizard
Cluster Extension with the Bright View cluster extension wizard is described in sections 3.1, 3.2, and 3.3. Cluster Extension with Azure is described in Chapter 5.

The Amazon cloud service can be configured for Cluster Extension from Bright View. This can be done via the URL https://<head node address>:8081/bright-view/, and then selecting the clickpath Cloud→AWS→AWS Wizard. A screen introducing the AWS Wizard is then displayed.

The wizard goes through the following stages:

1. Introduction (section 3.1.1)
2. AWS Credentials (section 3.1.2)
3. Select Regions (section 3.1.3)
4. Summary & Deployment (section 3.1.5)
5. Deploy (section 3.1.6)

3.1.1 Introduction
The first screen displayed by the wizard is the introduction screen (figure 3.1), which reminds the administrator about the prerequisites for cloudbursting.

The Show, Save, and Load buttons allow the wizard to show, save, or load a YAML configuration text file. Saving a configuration at the start or end of a wizard run is usually convenient for an administrator.

3.1.2 AWS Credentials
The Next button brings up the credentials page, if the credentials for the cluster extension cloudburst are not yet known to CMDaemon (figure 3.2).
This asks for:

- **Provider Name**: This is can be any user-defined value. If using Amazon, it would be sensible to just put in *amazon*
- **AWS Access key ID**: The AWS Access key. Typically a string that is a mixture of upper case letters and numbers.
- **AWS Secret key**: The AWS secret key. Typically a longer string made up of alphanumeric characters.

In the case of Amazon, the information is obtainable after signing up for Amazon Web Services (AWS) at [https://console.aws.amazon.com/iam/home?#security_credential](https://console.aws.amazon.com/iam/home?#security_credential).

The `Validate` button validates the credentials at this point of the configuration when clicked, instead of waiting until the actual deployment. Clicking the `Next` button submits the details of this screen, and inputs for the next screen are then retrieved from Amazon.

### 3.1.3 Select Regions

If all goes well, the next screen (figure 3.3) displays region selection options for the Amazon cloud service.
Regions are designated by codes, for example `us-east-1`, `eu-west-1`, and so on. The following are implied by the first two letters associated with the region:

- **us**: United States
- **eu**: Europe
- **ap**: Asia Pacific
- **sa**: South America
- **ca**: Canada

In addition, the special `us-gov` prefix designates a region that helps customers comply with US government regulations.

Similarly, European data regulations may, for example, mean that data should be processed only within an `eu` region.

Other than legislative considerations, choosing capacity from a region that is geographically closer is often sensible for avoiding lag with certain applications. On the other hand, using off-peak capacity from a geographically distant location may make more sense if it is cheaper.


After the administrator has selected the regions that are to be used in deployment, the `Next` button can be clicked, to bring up the next screen.
3.1.4 Select Software Images

The Select Software Images screen (figure 3.4) lets the administrator select possible software images for the cloud director and for the cloud nodes. The cloud director virtual hardware type and cloud node virtual hardware type can also be selected in this screen.

![Select Software Images](image)

Figure 3.4: Selecting Software Images The Cluster Extension Wizard With Bright View

3.1.5 Summary & Deployment

The next screen is a Summary screen (figure 3.5).

![Summary Screen](image)

Figure 3.5: Summary Screen For The Cluster Extension Wizard With Bright View
3.2 Cluster Extension With AWS: Cloud Director Startup From Scratch

It summarizes the selections that have been made, and lets the administrator review them. The selections can be changed, if needed, by going back to the previous screens, by directly clicking on the values. Otherwise, on clicking the **Deploy** button, the configuration is deployed.

### 3.1.6 Deploy

During configuration deployment, a progress meter indicates what is happening as the configuration is processed. At the end of processing, the display indicates with the **Deployed with success** message that the cluster has been extended successfully (figure 3.6).

---

**Figure 3.6: Cluster Extension Configuration Processing With Bright View**

No nodes are activated yet within the cloud provider service. To start them up, the components of the cloud provider service must be started up by

- powering up the cloud directors (section 3.2)
- powering on the cloud nodes after the cloud directors are up. Often this involves creating new cloud nodes (section 3.3).

### 3.2 Cluster Extension With AWS: Cloud Director Startup From Scratch

The cloud director can take some time to start up the first time when it is **installing from scratch**. The bottleneck is usually due to several provisioning stages, where the bandwidth between the head node and the cloud director means that the provisioning runs typically take tens of minutes to complete. The progress of the cloud director can be followed in the Bright View event log viewer (section 13.2.11 of the *Administrator Manual*), or they can be followed in an open **cmsh** session, as the events are sent to the **cmsh** session.
The bottleneck is one of the reasons why the cloud director is put in the cloud in the first place: nodes are provisioned from a cloud director in the cloud faster than from a head node outside the cloud.

The bottleneck of provisioning from the head node to the cloud director is an issue only the first time around. The next time the cloud director powers up, and assuming persistent storage is used—as is the default—the cloud director runs through the provisioning stages much faster, and completes within a few minutes.

The reason why powering up after the first time is faster is because the image that is to power up is already in the cloud. A similar principle—of relying on data already available with the cloud provider—can be used as a technique to make first time startup even faster. The technique is to have a pre-built image—a snapshot—of the cloud director stored already with the cloud provider. The first-time startup of a cloud director based on a snapshot restoration is discussed in section 3.4.

The remainder of this section is about starting up a cloud director from scratch—that is, a first time start, and without a pre-built image.

To recap: by default, a cloud director object is created during a run of the Cluster Extension wizard (section 3.1).

There can be only one cloud director per region. Because a cloud director also has properties specific to the region within which it directs nodes, it means that cloud directors can only be created from scratch, via cluster extension.

Once a cloud director object has been made in CMDaemon, then the cloud director is ready to be started up. In Bright View the cloud director can be started by powering it up from its node settings, just like a regular node. If the cloud director node is not visible, then a browser refresh should clear up the cache so that it becomes visible. For the cloud director a clickpath to power it up is:

Devices → Cloud Nodes → Cloud director → ↓ Power → On

As indicated earlier on, the cloud director acts as a helper instance in the cloud. It provides some of the functions of the head node within the cloud, in order to speed up communications and ensure greater resource efficiency. Amongst the functions the cloud director provides are:

- Cloud nodes provisioning
- Exporting a copy of the shared directory `/cm/shared` to the cloud nodes so that they can mount it
- Providing routing services using an OpenVPN server. While cloud nodes within a region communicate directly with each other, cloud nodes in one region use the OpenVPN server of their cloud director to communicate with the other cloud regions and to communicate with the head node of the cluster.

Cloud directors are not regular nodes, so they have their own category, `cloud-director`, into which they are placed by default.

The cloud-related properties of the cloud director can be viewed and edited via the clickpath:

Devices → Cloud Nodes → Cloud director → Edit

### 3.2.1 Setting The Cloud Director Disk Storage Device Type

Amazon provides two kinds of storage types as part of EC2:

1. **Instance storage**, using so-called ephemeral devices. Ephemeral means that the device is temporary, and means that whatever is placed on it is lost if the instance is stopped, terminated, or if the underlying disk drive fails.

Some instances have ephemeral storage associated with the instance type. For example, at the time of writing (May 2017), the `m3.medium` type of instance has 4GB of SSD storage associated with it.
3.2 Cluster Extension With AWS: Cloud Director Startup From Scratch

Details on instance storage can be found at http://docs.aws.amazon.com/AWSEC2/latest/UserGuide/InstanceStorage.html#instance-store-volumes.

2. Elastic Block Storage (EBS) volumes: EBS is a persistent, reliable, and highly available storage. Normally, EBS is suggested for cloud director and cloud node use. The reasons for this include:
   - it can be provided to all nodes in the same availability zone
   - unlike instance storage, EBS remains available for use when an instance using it is stopped or terminated.
   - instance storage is not available for many instance types such as t2.micro, t2.small, c4.large.

Using The Ephemeral Device As The Drive For The Cloud Director:
Since the cloud provider instance type is essential, and contains so much data, it is rare to use ephemeral devices as the drive for the cloud provider.

However, if for some reason the administrator would like to avoid using EBS, and use the instance storage, then this can be done by removing the default EBS volume suggestion for the cloud director provided by Bright Cluster Manager. When doing this, the ephemeral device that is used as the replacement must be renamed. It must take over the name that the EBS volume device had before it was removed.

- In Bright View, this can be done in the EC2 Storages window, which for a cloud director <cloud director hostname> can be viewed and modified via the clickpath:

  Devices→Cloud Nodes→<cloud director hostname>→Edit→Settings→Cloud settings→STORAGE→Storage→<storage type>→Edit

- In cmsh, this can be done in device mode, by going into the cloudsettings submode for the cloud director, and then going a level deeper into the storage submode. Within the storage submode, the list command shows the values of the storage devices associated with the cloud director. The values can be modified as required with the usual object commands. The set command can be used to modify the values.

Example

[bright91]% device use us-east-1-director
[bright91->device[us-east-1-director]]% cloudsettings
[bright91->device[us-east-1-director]->cloudsettings]% storage
[bright91->...->cloudsettings->storage]% list
Type   Name (key)  Drive  Size   Volume ID
------- ------------ -------- ------ ---------
ebs     ebs        sdb      42GB    
ephemeral ephemeral0  sdc      0B ephemeral0
[bright91->...->cloudsettings->storage]% remove ebs
[bright91->...->cloudsettings->storage]% set ephemeral0 drive sdb
[bright91->...->cloudsettings->storage]% list
Type   Name (key)  Drive  Size   Volume ID
------- ------------ -------- ------ ---------
ephemeral ephemeral0  sdb      0B ephemeral0
[bright91->...->cloudsettings->storage]% commit

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3.2.2 Setting The Cloud Director Disk Size

The disk size for the cloud director can be set in Bright View using the EC2 Storages window (section 3.2.1).

By default, an EBS volume size of 42GB is suggested. This is as for a standard node layout (section D.3 of the Administrator Manual), and no use is then made of the ephemeral device.

42GB on its own is unlikely to be enough for most purposes other than running basic hello world tests. In actual use, the most important considerations are likely to be that the cloud director should have enough space for:

- the user home directories (under /home/)
- the cluster manager shared directory contents, (under /cm/shared/)
- the software image directories (under /cm/images/)

The cluster administrator should therefore properly consider the allocation of space, and decide if the disk layout should be modified. An example of how to access the disk setup XML file to modify the disk layout is given in section 3.9.3 of the Administrator Manual.

For the cloud director, an additional sensible option may be to place /tmp and the swap space on an ephemeral device, by appropriately modifying the XML layout for the cloud director.

3.2.3 Tracking Cloud Director Startup

Tracking Cloud Director Startup From The EC2 Management Console

The boot progress of the cloud director <cloud director> can be followed by watching the status of the instance in the Amazon EC2 management console, as illustrated in figure 2.7. The Instance ID that is used to identify the instance can be found

- with Bright View, within the clickpath Devices→Cloud Nodes→<cloud director>→Edit→Settings→Cloud settings→Instance ID
- with cmsh, by running something like:

  Example

  [bright91]$ device use us-east-1-director
  [bright91->device[us-east-1-director]]% get cloudid
  i-f98e7441
  [bright91->device[us-east-1-director]]% cloudsettings
  [bright91->device[us-east-1-director]-cloudsettings]% get instanceid
  i-f98e7441

Tracking Cloud Director Startup From Bright View

The boot progress of the cloud director can also be followed by

- watching the icon changes for the cloud node states in the clickpath Devices→Cloud Nodes. The icons indicating the state follow the description given in section 5.5.1 of the Administrator Manual

Tracking Cloud Director Startup From The Bash Shell Of The Head Node

There are some further possibilities to view the progress of the cloud director after it has reached at least the initrd stage. These possibilities include:

- an SSH connection to the cloud director can be made during the pre-init, initrd stage, after the cloud director system has been set up via an rsync. This allows a login to the node-installer shell.

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• an SSH connection to the cloud director can be also be made after the initrd stage has ended, after
the init process runs making an SSH daemon available again. This allows a login on the cloud
director when it is fully up.

During the initrd stage, the cloud director is provisioned first. The cloud node image(s) and shared
directory are then provisioned on the cloud director, still within the initrd stage. To see what rsync is
supplying to the cloud director, the command "ps uww -C rsync" can be run on the head node. Its
output can then be parsed to make obvious the source and target directories currently being transferred:

Example

```
[root@bright91 ~]# ps uww -C rsync | grep -o ' /cm/.*$'
/cm/shared/ syncer@172.21.255.251::target//cm/shared/
```

Tracking Cloud Director Startup From cmsh

The provisioningstatus command in cmsh can be used to view the provisioning status (some output
elided):

Example

```
[root@bright91 ~]# cmsh -c "softwareimage provisioningstatus"
...
+ us-east-1-director
...
  Up to date images: none
  Out of date images: default-image
```

In the preceding output, the absence of an entry for "Up to date images" shows that the cloud
director does not yet have an image that it can provision to the cloud nodes. After some time, the last
few lines of output should change to something like:

Example

```
+ us-east-1-director
...
  Up to date images: default-image
```

This indicates the image for the cloud nodes is now ready.

With the -a option, the provisioningstatus -a command gives details that may be helpful. For
example, while the cloud director is having the default software image placed on it for provisioning
purposes, the source and destination paths are /cm/images/default-image:

Example

```
[root@bright91 ~]# cmsh -c "softwareimage provisioningstatus -a"
Request ID(s): 4
Source node: bright91
Source path: /cm/images/default-image
Destination node: us-east-1-director
Destination path: /cm/images/default-image
```

After some time, when the shared filesystem is being provisioned, the source and destination paths
should change to the /cm/shared directory:
[root@bright91 ~]# cmsh -c "softwareimage provisioningstatus -a"
Request ID(s): 5
Source node: bright91
Source path: /cm/shared
Destination node: us-east-1-director
Destination path: /cm/shared
...

After the shared directory and the cloud node software images are provisioned, the cloud director is fully up. Cloud node instances can then be powered up and provisioned from the cloud director.

### 3.3 Cluster Extension With AWS: Cloud Node Startup From Scratch

This section discusses the configuration of regular cloud node startup from scratch. Configuration of cloud node startup from snapshot is discussed in section 3.4. Regular cloud nodes are the cloud nodes that the cloud director starts up.

To configure the regular cloud nodes does not require a working cloud director. However to boot up the regular cloud nodes does require that the cloud director be up, and that the associated networks to the regular cloud nodes and to the head node be configured correctly.

If needed, additional cloud provisioning nodes (section 5.2 of the Administrator Manual) can be configured by assigning the provisioning role to cloud nodes, along with appropriate nodegroups (page 163 of the Administrator Manual) values, in order to create a provisioning hierarchy.

Creation and configuration of regular cloud node objects is conveniently carried out by cloning another regular cloud node from one of the default cloud nodes already created by the cluster extension wizard (section 3.1). A clickpath is:

Device → Cloud Nodes → cloud node hostname → ↓ Clone

Cloud node objects can also be created in cmsh as described in section 4.2.

The internal network for the regular cloud nodes is by default set to the VPC private network, and is somewhat similar to the internal network for regular nodes. The VPC private network can be contrasted with the VPC public network for cloud directors, which is a network that is by default assigned to cloud directors, and which floating IP addresses can connect to. Both the VPC private and VPC public networks are subnets of a cloud network. If the administrator would like to do so, the regular cloud nodes can be placed in the VPC public network and become directly accessible to the public.

If the cloud director is up, then the cloud nodes can be booted up by powering them up (section 4.2 of the Administrator Manual) by category, or individually.

### 3.4 Cluster Extension With AWS: Cloud Director And Cloud Node Startup From Snapshots

A technique that speeds up cluster deployment in the cloud is to use snapshots to start up the nodes in the cloud. Snapshots are snapshots of a shutdown state, and are stored by the cloud provider. In Amazon, they can be stored in EBS. It is cheaper to keep a machine in a stored state, rather than have it up but idling. Restoring from a snapshot is also significantly faster than starting up from scratch, due to optimizations by the cloud provider. An administrator should therefore get around to looking at using snapshots once cloudbursting is set up and the usage pattern has become clearer.

As a part of regular maintenance, snapshot configuration can be repeated whenever cloud director and cloud node files change significantly, in order to keep usage efficiency up.

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3.4 Cluster Extension With AWS: Cloud Director And Cloud Node Startup From Snapshots

3.4.1 Cloud Director Startup From Snapshots

Cloud Director Snapshot Preparation

A cloud director, for example `us-east-1-director`, can have a snapshot of its state prepared as follows by the administrator:

- The cloud director is started up from scratch (section 3.2)

- After it comes up for the first time, the administrator shuts it down cleanly. For example, with a command similar to `cmsh -c "device use us-east-1-director; shutdown"

- After the cloud-director shutdown is complete, the administrator creates a snapshot of a cloud director using the EC2 Management Console. This can be done by selecting Elastic Block Store in the navigator column, then selecting the `Volumes` item within that menu. The volume associated with the cloud director can be identified by matching the `Attachment Information` column value with the name `us-east-1-director` for this node, and the device to be snapshots. In a default configuration, the device is `/dev/sdb` at the time of writing, but that may change. The `Actions` button in the main pane then provides a `Create Snapshot` item (figure 3.7).

![Figure 3.7: Creating A Snapshot From A Selected Volume](image)

Using it creates a snapshot of a selected volume instance via a dialog. The snapshot ID is displayed at the end of the snapshot creation dialog, and should be noted for CMDaemon use later on, where it is saved as the value of `snapshotid`.

Created snapshots can be viewed within the `Snapshots` item of the Elastic Block Store menu.

Cloud Director Launch From Prepared Snapshot

To allow CMDaemon to launch the cloud director from the snapshot, the following procedure can be followed:

- The instance must be terminated so that the snapshot can actually be used by the instance on starting it again:

  **Example**

  ```
  [bright91->device[us-east-1-director]]% terminate
  us-east-1-director terminated
  ```

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• The snapshot ID that was noted earlier during snapshot preparation is set in the EBS storage setting configuration of the CMDaemon database, using a session similar to:

Example

[root@bright91 ~]# cmsh
[bright91]# device
[bright91->device]% use us-east-1-director
[bright91->device[us-east-1-director]]% cloudsettings
[bright91->...-director]->cloudsettings% storage
[bright91->...-director]->cloudsettings->storage]% use ebs
[bright91->...-director]->cloudsettings->storage[ebs]]% set snapshotid snap-2a96d0c6

The cloud director can now be powered on:

Example

[bright91->device[us-east-1-director]]% power on

The cloud director now starts up much faster than when starting up from scratch.

3.4.2 Cloud Node Startup From Snapshots

When a regular cloud node is launched from scratch (section 3.3), it uses the cloud director for provisioning, rather than a node outside the cloud, because this is faster. However, having the cloud director create an EBS volume from its storage in the cloud, and then providing the image to the cloud compute nodes still involves a lot of data I/O. On the other hand, a cloud provider such as Amazon can optimize many of these steps when creating an EBS volume from a snapshot, for example, by using copy-on-write. This means that snapshot-based provisioning is even speedier than the non-snapshot, “from scratch” method.

If the administrator wants to make a snapshot that can be used as the base for speedily launching regular cloud nodes, then the same snapshot method that is used for cloud directors (section 3.4.1) should be followed to make a snapshot for a regular cloud node.

A summary of the steps that can be followed is:

• a regular cloud node is started up from scratch (section 3.3), after the cloud director is up
• after the regular cloud node has come up, it is shut down cleanly
• a snapshot is created of the cloud node using the EC2 Management Console
• the cloud node is terminated
• the snapshot ID is set:

Example

[bright91->device[cnode001]->cloudsettings->storage[ebs]]% set snapshotid snap-5c9s3991

Powering on the node now launches the regular cloud node much faster than the non-snapshot method.

CMDaemon ensures that a snapshot for one cloud node can be used by other cloud nodes too, if the disk partitioning is the same. This is useful when launching cloud nodes that do not differ much from the snapshot.

It also means that even the cloud director image can be used as a snapshot to launch a regular cloud node, if the disk partitioning and other settings allow it. However, using a regular node snapshot for launch is usually much wiser, due to the extra filesystems that a cloud director has.
3.5 Cluster Extension With AWS: Optimizing AWS For High Performance Computing (HPC)

For HPC, performance is a central concern. Optimization for the jobs that are run can be carried out by the administrator considering what are the most cost-effective aspects of the system that can be improved. The considerations in this section for AWS, apply to COD instances as well as to Cluster Extension instances.

3.5.1 Optimizing HPC Performance: EBS Volume Type

The volume type used for EBS storage can be considered. AWS provides the gp2, io1, sc1, st1, and standard storage volume types. These volume types, and their associated IOPS performances, are described at https://docs.aws.amazon.com/AWSEC2/latest/UserGuide/EBSVolumeTypes.html.

- In cmsh these can be set in the storage mode:

  Example

  [bright91->device[cnode001]->cloudsettings->storage[ebs]]% set volumetype io1

- In Bright View, the equivalent clickpath is:

  Devices → Cloud Nodes → [cloud node hostname] → Edit → Settings → Cloud settings → STORAGE → Storage → ebs → CREATION TIME → Volume type

3.5.2 Optimizing HPC Performance: Placement Groups

The locality of the cloud nodes with respect to each other and with respect to the cluster that they extend from can be considered.

For cloud nodes in the same placement group, lag times are minimized between the nodes. For cloud nodes that are geographically near cluster that they extend from, the lag times are reduced between the cloud nodes and the cluster they extend from.

Localizing HPC cloud nodes within the same placement group is usually desirable. This can be achieved using the AWS web console to access the cluster extension AWS account. A placement group can be created for a region via the AWS web console for the instance.

The clickpath to carry this out is Services → EC2 → Services → Placement Groups → Create Placement Group. A name should be set. The value of Strategy should be set to Cluster, to localize the nodes.

The same placement group name can then be set via cmsh for the not-yet-instantiated cloud nodes. Setting this means that those nodes are now started in that placement group.

Example

[bright91->device[cnode001]->cloudsettings]% set placementgroup indahood

3.5.3 Optimizing HPC Performance: Disabling Hyper-Threading

Hyper-Threading (HT) in many cases hinders HPC performance. When running cluster extension cloud nodes, HT can be left enabled on some instancesm and disabled on others, depending on the need.

To disable HT, the following can be inserted into the /etc/rc.local file for the cloud node image, and made executable with a chmod +x:

```bash
for cpunum in $(cat /sys/devices/system/cpu/cpu*/topology/thread_siblings_list | 
    cut -s -d\| -f2- | tr ',' ' ' \n | sort -un); do echo 0 > /sys/devices/system/cpu/cpu$cpunum/online; done;
```

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The delimiter used in the `cut` command is “-” instead of a “,”.
If HT is disabled on the cloud node, then it can be confirmed by checking the output of the `lscpu --extended` command (output truncated):

Example

```
[root@cnode001 ~]# lscpu --extended
CPU NODE SOCKET CORE L1d:L1i:L2:L3 ONLINE
 0 0 0 0 0:0:0:0 yes
 1 - - - :::: no
...```

In the line just before the “...”, the “no” indicates that that logical CPU (CPU1 in this case) has been disabled.

### 3.5.4 Optimizing HPC Performance: Using Elastic Network Adapter Instances

Enhanced networking that is needed for some instance types is possible if the AMI used has the Elastic Network Adapter (ENA) support attribute set. By default, all AMIs provided by Bright Cluster Manager since release 8.1-9 have ENA, as provided by the `ena` kernel module. If this kernel module is absent, the administrator should update the AMI.

### 3.5.5 Optimizing HPC Performance: Using A Different Clock Source

Xen is the default clocksource on AWS. Occasionally, some applications can benefit from using the TSC clocksource. Because of this, the clock source is generally changed as a best practice. The clock source can be changed with the following command:

Example

```
[root@cnode001 ~]# echo "tsc" > /sys/devices/system/clocksource/current_clocksource```

### 3.5.6 Optimizing HPC Performance: Setting The Socket Buffer Sizes And TCP/IP Parameters In The Software Image

The socket and TCP/IP window values can be modified by inserting the following values into the `sysctl.conf` file in the image:

Example

```
[root@bright91 ~]# cat >> /cm/images/default-image/etc/sysctl.conf << EOF
net.core.netdev_max_backlog = 1000000
net.core.rmem_default = 124928
net.core.rmem_max = 67108864
net.core.wmem_default = 124928
net.core.wmem_max = 67108864
net.ipv4.tcp_keepalive_time = 1800
net.ipv4.tcp_mem = 12184608 8388608 67108864
net.ipv4.tcp_max_syn_backlog = 1800
net.ipv4.tcp_mem = 12184608 8388608 67108864
EOF```

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Cluster Extension Cloudbursting With AWS Using The Command Line And \texttt{cmsh}

The command line and \texttt{cmsh} can be used to set up Cluster On Demand clusters for AWS and Azure, as discussed in Chapter 2. The command line and \texttt{cmsh} can also be used to set up Cluster Extension clusters, as are discussed in this chapter for AWS, and in Chapter 5 for Azure.

4.1 The \texttt{cm-cluster-extension} Script For Cluster Extension Clusters

4.1.1 Running The \texttt{cm-cluster-extension} Script On The Head Node For Cluster Extension Clusters

The \texttt{cm-cluster-extension} script is run from the head node. It is a part of the Bright Cluster Manager cluster-tools package. It allows cloudbursting to be carried out entirely from the command line for Cluster Extension setups. It is a command line way of carrying out the configuration carried out by the GUI steps of section 3.1 for cloud provider login and cloud director configuration. After the script has completed its setup, then \texttt{cmsh} power commands can launch the required cloud nodes (sections 4.1.2 and 4.2).

The \texttt{cm-cluster-extension} script can be run in plain dialog mode (page 55), or as an Ncurses dialog (page 57).

Running The \texttt{cm-cluster-extension} Command Line Options As A Shell Dialog

The administrator can specify command line options to \texttt{cm-cluster-extension}, as shown in its help text. The help text is displayed with the \texttt{-h|--help} option:

```
[root@bright91 ~]# cm-cluster-extension -h
Please wait...
usage: cm-cluster-extension
        [-v] [-h] [-c <config_file>]
        [--skip-modules <mod1,mod2,...>]
        [--only-these-modules <mod1,mod2,...>]
        [--dev]
        [--on-error-action {debug,remotedebug,undo,abort}]
        [--output-remote-execution-runner]
        [--json] [--no-distro-checks]
        [--min-reboot-timeout <reboot_timeout_seconds>]
        [--remove]
        [--terminate-instances]
        [--remove-fsx-instances]
        [--force]
```

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[--yes-i-know-this-is-dangerous-for-this-cluster <headnode_hostname>]
[--test-networking]
[--test-environment]
[--test-configuration]
[--test-everything]
[--enable-external-network-connectivity]

**common:**

**Common arguments**

- `-v` Verbose output
- `-h, --help` Print this screen
- `-c <config_file>` Load runtime configuration for modules from a YAML config file

**advanced:**

Various *advanced* configuration options flags.

- `--skip-modules <mod1,mod2,...>` Load and use all the default plugins (cloudstorage, clusterextension), except for these. Comma-separated list.
- `--only-these-modules <mod1,mod2,...>` Out of all default plugins, load and use only these. Comma-separated list.
- `--dev` Enables additional command line arguments
- `--on-error-action {debug,remotedebug,undo,abort}` Upon encountering a critical error, instead of asking the user for choice, setup will undo (revert) the deployment stages.
- `--output-remote-execution-runner` Format output for CMDaemon
- `--json` Use json formatting for log lines printed to stdout
- `--no-distro-checks` Disable distribution checks based on ds.json
- `--min-reboot-timeout <reboot_timeout_seconds>` How long to wait for nodes to finish reboot (default and minimum allowed: 300 seconds).

**removing cluster extension:**

Flags which can be used for removing AWS integration

- `--remove` Remove definitions of all objects required for cluster extension, e.g. cloud nodes, directors, cloud networks and cloud interfaces
- `--terminate-instances` Terminate all non-terminated VMs.
- `--remove-fsx-instances` Remove FSX instances.
- `--force` Skip interactive confirmation for `--remove`
- `--yes-i-know-this-is-dangerous-for-this-cluster <headnode_hostname>` Additional confirmation

**testing cluster extension:**

Flags which can be used for troubleshooting

- `--test-networking` Perform networking checks (e.g. check if API endpoints are reachable)
- `--test-environment` Run environment checks (e.g. if proper RPMs are installed)
- `--test-configuration` Run configuration checks, which check if cluster extension is properly configured (e.g. if cloud director has correct interfaces, if cloud credentials are valid, if CMDaemon can create/delete objects in the
4.1 The cm-cluster-extension Script For Cluster Extension Clusters

cluster extension to Bright OpenStack:
Options specific to this cloud type.

--enable-external-network-connectivity
   Enable external network connectivity for cloud nodes. Note that this
disables security groups for the cloud director, which may be a security
risk. Requires Neutron Port Security extension driver.

examples:
   cm-cluster-extension (start interactive menu, wizard)
   cm-cluster-extension -c <config> (configure bursting to AWS)
   cm-cluster-extension --remove (remove bursting)
   cm-cluster-extension --remove --force --yes-i-know-this-is-dangerous-for-this-cluster <hostname>
   (remove bursting, no confirmation)
   *WARNING* This will remove the cloud extension configuration. Any data located on your
   cloud nodes will be lost, unless you back it up beforehand.
   cm-cluster-extension --test-everything

This tool looks for the following environment variables, and uses them if found:
AWS_USERNAME, AWS_ACCOUNT_ID, AWS_ACCESS_KEY_ID, AWS_SECRET_ACCESS_KEY
AZURE_SUBSCRIPTION_ID, AZURE_TENANT_ID, AZURE_CLIENT_ID, AZURE_CLIENT_SECRET

It can be run with the options directly (some output skipped):

Example

[root@bright91 ~]# cm-cluster-extension --test-networking
Please wait...
Found an optional config file, '/root/cm-setup.conf'. Will attempt to load it.
Executing 26 stages
!!!!!!!!!!!!!!!!!!!! Starting execution for 'Running networking checks'
Connecting to CMDaemon
   - cloudstorage
   - clusterextension
### stage: clusterextension: Testing tcp connection to ec2.us-east-1.amazonaws.com:443
### stage: clusterextension: Testing tcp connection to ec2.us-west-1.amazonaws.com:443
...
### stage: clusterextension: Testing udp OpenVPN connectivity

Took: 00:09 min.
!!!!!!!!!!!!!!!!!!!! Finished execution for 'Running networking checks', status: completed

Running networking checks finished!

Running The cm-cluster-extension Ncurses Dialog
The more user-friendly way to run cm-cluster-extension is to run it without options. This brings up
the main screen for its Ncurses dialog (figure 4.1).
Cluster extension cloudbursting deployment can be carried out by selecting AWS (described in this chapter) or Azure (Chapter 5) from the main screen.

After AWS is selected, a new AWS provider can be set if none is already set up. Testing only the network connectivity to the various AWS regions is also possible.

If a new AWS provider is selected, then a screen comes up asking for the credentials for Amazon (figure 4.2):

To paste the credentials from the clipboard, the cluster administrator may find it helpful to know that a paste to Ncurses can usually be carried out with a <shift><right click>.

After checking the credentials, the initial number of cloud nodes to be set up in the cloud can be set (figure 4.3). A default of 3 is suggested.

After setting an initial number of cloud nodes, the available regions into which these can be deployed are displayed (figure 4.4):
4.1 The \texttt{cm-cluster-extension} Script For Cluster Extension Clusters

Please select the region(s) to which you would like to extend your cluster to.

The setup process will later create and configure a VPC for each selected region.

You can always add and configure additional regions later on.

After selecting one or more regions, a default instance type must be set for the regular cloud nodes. \texttt{m3.medium} (3.75GB RAM, 4GB SSD, 3 EC2 compute units) is the suggested default (figure 4.5):

A similar default instance type screen asks for the cloud director node type, and \texttt{m3.medium} is again the suggested default.

The summary screen (figure 4.6) is a screen to let the administrator look things over before deployment:
The summary screen allows the following:

- An administrator can just go ahead, save the configuration, and deploy the cluster extension. This is usually the expected action.

- The configuration settings YAML file can be viewed. To scroll, the PageUp and PageDown keys are used.

- The advanced configuration settings screen can be accessed in addition to the standard settings. The advanced settings are usually left alone.

- The configuration file, `<configuration file>`, can be saved and the Ncurses dialog can be exited. By default, the value of `<configuration file>` is set to `cm-cluster-extension.conf` in the home directory of the user. On exiting the Ncurses dialog, deployment with that configuration can be carried out manually by running:

  ```
  cm-cluster-extension -c `<configuration file>`
  ```

After `cm-cluster-extension` has carried out a successful deployment, the cloud nodes (the cloud director and regular cloud nodes) can be launched.

### 4.1.2 Launching The Cloud Director For Cluster Extension Clusters

Launching the cluster in the cloud requires that the cloud director (section 3.2) and cloud nodes be powered up. This can be done using Bright View as described in sections 3.2 and 3.3. It can also be carried out in `cmsh`, for example, the cloud director `eu-west-1-director` can be powered up from device mode with:

**Example**

```cmsh
cmsh -c "device power on -n eu-west-1-director"
```

If the administrator is unsure of the exact cloud director name, one way it can easily be found is via tab-completion within the `device` mode of `cmsh`. Alternatively, the cloud directors for AWS can be listed with:

**Example**

```cmsh
cmsh -c "device; list -c aws-cloud-director"
```

As explained in section 3.2, the cloud director takes some time to power up. Its status can be followed in the notice messages sent to the `cmsh` session, or in the Bright View event viewer. The status can also be queried via the `status` command in device node. For example, a `watch` instruction such as:

```bash
[root@bright91 ~]# watch 'cmsh -c "device status -n eu-west-1-director"'
```

will show a series of outputs similar to:

```text
eu-west-1-director ........ [ PENDING ] (Waiting for instance to start)
eu-west-1-director ........ [ PENDING ] (Waiting for instance to start)
eu-west-1-director ........ [ PENDING ] (IP assigned: 54.220.240.166)
eu-west-1-director ........ [ PENDING ] (setting up tunnel)
eu-west-1-director ....... [ INSTALLER_REBOOTING ]
eu-west-1-director ....... [ INSTALLING ] (recreating partitions)
eu-west-1-director ....... [ INSTALLING ] (FULL provisioning to "/")
eu-west-1-director ....... [ INSTALLING ] (provisioning started)
eu-west-1-director [ INSTALLER_CALLINGINIT ] (switching to local root)
eu-west-1-director ....... [ UP ]
```
4.2 Launching The Cloud Nodes

Once the cloud director is up on the cloud provider, the regular cloud nodes can also be powered up. This does however first require that the corresponding cloud node objects exist. That is, that CMDaemon must have a representation of the cloud nodes, even if they do not yet exist on the cloud provider. The objects must each have an IP address assigned to them that is consistent with that of the cloud director that manages them. That is, the network address of the cloud nodes must be what the cloud director expects.

Bright Cluster Manager’s cluster extension utilities create 3 cloud node objects by default (figure 4.4, page 59). Cloning them is an easy way to extend the number of deployable cloud nodes.

With Bright View, this can be done with the `clone` command to assign properties to the clone that match the original (section 3.3), but advance the relevant IP addresses by 1. In cmsh, the `clone` command works the same way.

To launch a cloud node that has an object, a command can be run as follows:

```
[bright91->device[cnode001]->interfaces]% device power on -n cnode001
```

4.2.1 Creating And Powering Up Many Nodes

For a large number of cloud nodes, the creation and assignment of IP addresses can be done with the clone option of the `foreach` command, (section 2.5.5 of the Administrator Manual), together with a node range specification. This is the same syntax as used to create non-cloud regular nodes with cmsh.

Earlier on in this section, starting from page 57, an Ncurses session was run that ended up creating

- the cloud director eu-west-1-director and
- regular node objects eu-west-1-cnode001 up to eu-west-1-cnode003.

Continuing with the end result of that session, cloning many further regular cloud nodes can now be carried out by cloning eu-west-1-cnode003:

Example

```
[bright91->device]% foreach --clone eu-west-1-cnode003 -n eu-west-1-cnode0[04-12] ()
Warning: The Ethernet switch settings were not cloned, and have to be set manually...
...[bright91->device*]% commit
Successfully committed 9 Devices
[bright91->device]%
```

As a reminder, the node range option `-n eu-west-1-cnode004..eu-west-1-cnode012` would also be valid for the preceding example, and perhaps easier to comprehend, although longer.

The IP addresses are assigned to the cloud nodes via heuristics based on the value of eu-west1-cnode003 and its cloud director.

Powering up many cloud nodes can carried out using cmsh with the node range option as follows:

Example

```
[bright91->device]% power on -n eu-west-1-cnode0[02-10]
```

4.3 Submitting Jobs With cmjob And Cloud Storage Nodes, For Cluster Extension Clusters

The cmjob command is a user command wrapper that submits job scripts to a workload manager in a Cluster Extension cluster, so that jobs are considered for running in the cloud. Its usage for an end user is covered in section 4.7 of the User Manual.
The `cmjob` command is available from the Bright Cluster Manager repository as part of the `cmdaemon-cmjob` package. The `cmjob` command needs the `cmjob` environment module (section 2.2 of the Administrator Manual) to be loaded by the end user before use. In addition, an administrator must assign the `cloudjob` profile (section 6.4 of the Administrator Manual) to `cmjob` users.

**Example**

```
[root@bright91 ~]# cmsh
[bright91]$ user use henry
[bright91->user[henry]]% set profile cloudjob; commit
```

If the `cmjob` command is run by the user to submit a job, then the job is submitted to the workload manager, and the data-aware scheduling mechanism is initiated.

A cluster with data-aware scheduling is a cluster that ensures that it has the data needed for the cloud computing job already accessible on cloud storage nodes.

Cloud storage nodes are nodes that are set up by the cluster manager, before the job is executed in the cloud. Because data stored can be written and read from many cloud storage nodes for each job that is placed in the cloud, the data throughput in the cloud becomes more efficient than if only one storage space were used.

Cloud storage nodes are powered up automatically if `cmjob` has been installed and configured. They must however be powered down explicitly, and this must be done before the cloud director that it depends on is powered down.

### 4.3.1 Installation and Configuration of `cmjob` for Data-aware Scheduling To The Cloud

The configuration of data-aware scheduling means configuring the cluster so that the tools that allow data-aware scheduling to work correctly are configured. The configuration that is carried out depends on the workload manager that is to be used.

If `cmjob` has not yet been set up, or if it needs reconfiguration, then the following steps should be carried out:

1. The `cmdaemon-cmjob` package is installed. It must be installed on the head node and in the software image that is to be used for compute cloud nodes and storage cloud nodes.

   **Example**

   ```
   [root@bright91 ~]# yum install cmdaemon-cmjob
   [...]
   [root@bright91 ~]# yum --installroot /cm/images/default-image install cmdaemon-cmjob
   [...]
   ```

2. The `cm-cloud-storage-setup` utility is run. Example runs are provided later, starting on page 63, but an explanatory background is given here first.

   The utility is part of the `cluster-tools` package, which is installed by default. The utility

   - configures `cmjob` properties
   - creates
     - templates for cloud storage nodes
     - storage policies for `cmjob`
4.3 Submitting Jobs With cmjob And Cloud Storage Nodes, For Cluster Extension Clusters

Templates For Cloud Storage Nodes And Storage Policy

Templates for cloud storage nodes: are a cloud node definition associated with a cloud provider. Templates for cloud storage nodes, more conveniently called template nodes, provide a template that is used by the cloud storage nodes. Template nodes, being templates, are never powered on, and are therefore always in a Down state in cmsh and Bright View. Actual cloud storage nodes, on the other hand, can be powered on by the cluster manager, so that they can be used to store cloud job data.

In addition, any network interfaces associated with a template node can generally be regarded as non-functioning as far as the administrator is concerned. One feature of template nodes however is that the tunnel IP address set in the template is an offset to the network address that will be used to assign IP addresses to actual storage nodes.

A storage policy: defines other parameters for how storage for cloud jobs is handled. Its parameters include:

- **Name**: the name set for the policy
- **Bucket Name**: the S3 bucket used for cloud jobs to transfer input and output job data
- **Default job output size**: specifies the default free storage space that will be provisioned for the result that a job produces
- **Storage node name prefix**: specifies a prefix for how storage nodes are to be named. The prefix is cstorage by default. The number suffix scheme is as for regular nodes. Thus, by default, the storage nodes are cstorage001, cstorage002 and so on.
- **Template for cloud nodes**: the template to use as the prototype for storage nodes

Example

Configuration Of cmjob Properties With cm-cloud-storage

The cm-cloud-storage-setup is an Ncurses utility that configures cmjob properties for a cloud deployment. When run with the -h|--help option its usage is displayed:

```
[root@bright91 ~]# cm-cloud-storage-setup -h
Please wait...
usage: Cloud storage setup cm-cloud-storage-setup [-v] [-h] [-c <config_file>]
       [--dev]
       [--on-error-action {debug,remotedebug,undo,abort}]
       [--output-remote-execution-runner]
       [--json]
       [--no-distro-checks]
       [--min-reboot-timeout <reboot_timeout_seconds>]
       [--skip-reboot] [--remove]
```

optional arguments:

- **--skip-reboot** Don't reboot the nodes

common:

Common arguments

- **-v** Verbose output
- **-h, --help** Print this screen
- **-c <config_file>** Load runtime configuration for modules from a YAML config file

advanced:

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Various *advanced* configuration options flags.

--dev Enables additional command line arguments
--on-error-action {debug,remotedebug,undo,abort}
   Upon encountering a critical error, instead of asking the user for choice, setup will undo (revert) the deployment stages.
--output-remote-execution-runner
   Format output for CMDaemon
--json Use json formatting for log lines printed to stdout
--no-distro-checks
--min-reboot-timeout <reboot_timeout_seconds>
   How long to wait for nodes to finish reboot (default and minimum allowed: 300 seconds).

Remove storage:
--remove Cleanup storage setup

The administrator is usually expected to run cm-cloud-storage-setup without arguments. This brings up the Ncurses-based dialog, which starts with an introductory page (figure 4.7):

Figure 4.7: Cloud Storage Configuration Processing With cm-cloud-storage: Main Screen

Continuing on brings up the network selection screen, which sets the network in which the cloud storage is to be placed (figure 4.8):

Figure 4.8: Cloud Storage Configuration Processing With cm-cloud-storage: Network Selection

After having selected the network, a category for the storage nodes is set (figure 4.9):
4.3 Submitting Jobs With \texttt{cm\_job} And Cloud Storage Nodes, For Cluster Extension Clusters

It is recommended that a new category be created (figure 4.10):

![Figure 4.10: Cloud Storage Configuration Processing With \texttt{cm\_cloud\_storage}: Category Creation](image)

A bucket name can be set (figure 4.11):

![Figure 4.11: Cloud Storage Configuration Processing With \texttt{cm\_cloud\_storage}: S3 Bucket Entry](image)

A workload manager is set for the cloud storage (figure 4.12):

![Figure 4.12: Cloud Storage Configuration Processing With \texttt{cm\_cloud\_storage}: Workload Manager Selection](image)

It is recommended that a new queue be created for jobs that use the storage (figure 4.13):
Figure 4.13: Cloud Storage Configuration Processing With cm-cloud-storage: Queue Creation

The queues can be assigned to the cloud category (figure 4.14):

Figure 4.14: Cloud Storage Configuration Processing With cm-cloud-storage: Setting The Queue Category

The summary screen allows the configuration to be saved and to be deployed (figure 4.15):

Figure 4.15: Cloud Storage Configuration Processing With cm-cloud-storage: Summary Screen

If the configuration is to be saved, then the file path should be specified (figure 4.16):

Figure 4.16: Cloud Storage Configuration Processing With cm-cloud-storage: Save & Deploy Screen

/root/cm-cloud-storage-setup.conf is the suggested default. On exit, the saved configuration can be run with:

Example

[root@bright91 ~]# cm-cloud-storage-setup -c cm-cloud-storage-setup.conf

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4.3 Submitting Jobs With `cmjob` And Cloud Storage Nodes, For Cluster Extension Clusters

**Configuring `cmjob` Properties With `cmsh`**

The storage node policy settings can be modified via CMDaemon using `cmsh`:

```
[root@bright91 ~]# cmsh
[bright91]# cmjob
[bright91->cmjob(cmjob)]% storagenodepolicies
[bright91->cmjob(cmjob)->storagenodepolicies]% list
```

<table>
<thead>
<tr>
<th>Name (key)</th>
<th>Template for cloud nodes</th>
</tr>
</thead>
<tbody>
<tr>
<td>us-east-1-policy</td>
<td>us-east-1-storage-template</td>
</tr>
</tbody>
</table>

```
[bright91->cmjob(cmjob)->storagenodepolicies[us-east-1-policy]]% use us-east-1-policy
[bright91->cmjob(cmjob)->storagenodepolicies[us-east-1-policy]]% show
```

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default job output size</td>
<td>30.0GiB</td>
</tr>
<tr>
<td>Exported directories</td>
<td>home</td>
</tr>
<tr>
<td>Intermediate storage</td>
<td>&lt;submode&gt;</td>
</tr>
<tr>
<td>Max download time</td>
<td>2h</td>
</tr>
<tr>
<td>Max jobs per node</td>
<td>10</td>
</tr>
<tr>
<td>Max storage nodes</td>
<td>5</td>
</tr>
<tr>
<td>Max upload time</td>
<td>2h</td>
</tr>
<tr>
<td>Minimum Storage volume size</td>
<td>30.0GiB</td>
</tr>
<tr>
<td>Name</td>
<td>us-east-1-policy</td>
</tr>
<tr>
<td>Revision</td>
<td>Storage node idle time limit 15m</td>
</tr>
<tr>
<td>Storage node name prefix</td>
<td>us-east-1-cstorage</td>
</tr>
<tr>
<td>Storage volume filesystem</td>
<td>ext3</td>
</tr>
<tr>
<td>Template for cloud nodes</td>
<td>us-east-1-storage-template</td>
</tr>
<tr>
<td>Tunnel IP start address</td>
<td>0.0.100.0</td>
</tr>
</tbody>
</table>

```
[bright91->cmjob(cmjob)->storagenodepolicies[us-east-1-policy]]% intermediatestorage
[bright91->cmjob(cmjob)->storagenodepolicies[us-east-1-policy]->intermediatestorage]% show
```

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bucket name</td>
<td>bright91b86bdc32219494f9a21</td>
</tr>
<tr>
<td>Max object lifetime</td>
<td>4w 2d</td>
</tr>
<tr>
<td>Region</td>
<td>us-east-1</td>
</tr>
<tr>
<td>Revision</td>
<td>Type AWSIntermediateStorage</td>
</tr>
<tr>
<td>SecGroupFSx</td>
<td>sg-0f1fe4fc6d3d49e66</td>
</tr>
<tr>
<td>Default FSx Instance Capacity (GiB)</td>
<td>1200</td>
</tr>
<tr>
<td>Max FSx Instance Capacity (GiB)</td>
<td>7200</td>
</tr>
<tr>
<td>Max FSx Instance Count Per User</td>
<td>5</td>
</tr>
</tbody>
</table>

By default the S3 bucket storage expires after 30 days.

Cloud jobs running under `cmjob` are listed under the `cloudjobs` submode:

```
[root@bright91 ~]# cmsh
[bright91]# cmjob
[bright91->cmjob(cmjob)]% cloudjobs
[bright91->cmjob(cmjob)->cloudjobs]% list
```

<table>
<thead>
<tr>
<th>Name (key)</th>
<th>jobStatus</th>
<th>storageNode</th>
<th>user</th>
</tr>
</thead>
<tbody>
<tr>
<td>slurm-35</td>
<td>Error: Job failed. Exit code: 0. Status: FAILED</td>
<td>us-east-1-cstorage001</td>
<td>fred</td>
</tr>
<tr>
<td>slurm-36</td>
<td>Error: Failed to acquire storage node: Failed t+</td>
<td></td>
<td>fred</td>
</tr>
<tr>
<td>slurm-37</td>
<td>Running...</td>
<td>us-east-1-cstorage001</td>
<td>fred</td>
</tr>
</tbody>
</table>

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4.3.2 Integration Of cmjob With AWS FSx For Lustre

*FSx for Lustre* is a high-performance highly scalable distributed file system that is available as a cloud service within some AWS regions. A Bright cluster that has burst into such a region can use FSx for Lustre to create a shared storage volume that can be read from, and can be written to, by many compute nodes simultaneously.

On a cluster that has burst into such a region, cmjob can provide workload managers with an FSx for Lustre instance to store input and output data.

Sequential workload manager jobs can then continue to use the same FSx for Lustre instance. This means that the output of one job can immediately become the input of the next one without having to transmit the data to and from an S3 bucket, or to and from the head node.

Additionally, workload manager jobs that run on multiple compute nodes in parallel can obtain their shared input from the same FSx for Lustre instance.

Providing shared storage to cloud compute nodes via FSx for Lustre is an alternative to providing it via cloud storage nodes (section 4.3). The storage node approach is not sufficiently scalable when there are more than several dozen compute nodes working simultaneously with the same storage node. FSx for Lustre is significantly more scalable and far more performant than storage nodes—although at a higher cost.

Bright Cluster Manager currently offers three different methods of integrating cmjob with FSx for Lustre:

1. **On-demand FSx**: An FSx file system is created on a per-job basis and is deleted automatically when the job completes.

2. **User-managed FSx**: A user creates an FSx instance and then submits one or more jobs that use that same FSx instance. These jobs can execute in sequence or simultaneously. When the last job has finished, the user is responsible for deleting the FSx instance.

3. **Admin-managed FSx**: An administrator creates an FSx instance and shares it with one or more users. These users are able to use the instance in the same way as with User-managed FSx, but they cannot delete the instance or see each other’s files.

Prerequisites

To be able to use the integration of cmjob with FSx for Lustre, the following requirements need to be met:

- The cluster must be bursting into an AWS region that supports FSx for Lustre. AWS does not offer this feature in all regions. The AWS documentation at [https://aws.amazon.com/about-aws/global-infrastructure/regional-product-services/](https://aws.amazon.com/about-aws/global-infrastructure/regional-product-services/) describes the regions that support FSx for Lustre.

- AWS needs to offer Lustre installation packages for the operating system and kernel that is used to extend into AWS. While the necessary Lustre package could perhaps be obtained directly from the Lustre project, it cannot be guaranteed that these packages are compatible with the FSx for Lustre file systems that are offered by AWS. The AWS packages are built and tested to work only with specific kernel versions.

- At the time of writing (May 2020), the supported operating systems are CentOS and Redhat 7.5, 7.6, 7.7. A list of supported operating systems as well as the packages for installing the Lustre client for such systems can be found at [https://docs.aws.amazon.com/fsx/latest/LustreGuide/install-lustre-client.html](https://docs.aws.amazon.com/fsx/latest/LustreGuide/install-lustre-client.html).

Enabling cmjob integration with FSx for Lustre:

The integration of cmjob with FSx for Lustre can be accomplished in two ways, either:
• through the cm-cloud-storage-setup wizard (section 4.3.1)

or

• manually

The cm-cloud-storage-setup wizard can be used if the preceding prerequisites have been met. In any case, during the wizard interaction, the administrator is asked to choose if FSx support should be enabled. If it is chosen, then:

• If FSx support is not available, then the administrator is informed that one of the requirements was not met.

• If FSx support is available, then no further action is required from the administrator.

After the deployment has finished, all users belonging to the cloudjob profile are able to create user-managed and on-demand FSx volumes through cmjob.

Enabling cmjob integration manually: The manual integration approach should be followed when cmjob has already been configured on a cluster. That is, if the cm-cloud-storage-setup tool has already been run but the cluster has been running without FSx support so far.

Two separate actions need to be executed to manually add FSx for Lustre integration:

1. Installation of the required packages to the images

The AWS documentation should mention the packages that are required to install the Lustre Client. Often these two packages are needed: kmod-lustre-client and lustre-client. Care must be taken to match the package version to the Linux kernel version of the images. The packages must be installed to the images under /cm/images that are used by the director and by all compute nodes within that cluster extension.

Example

At the time of writing (May 2020), for a CentOS 7.7 system, with a 3.10 kernel, the instructions at https://docs.aws.amazon.com/fsx/latest/LustreGuide/install-lustre-client.html suggested the following steps:

[root@bright91 ]# cm-chroot-sw-img /cm/images/<image used by director and compute nodes>
... 
... 
[root@bright91 ]# wget https://fsx-lustre-client-repo.s3.amazonaws.com/el/7/\fsx-lustre-client.repo -O /etc/yum.repos.d/aws-fsx.repo
[root@bright91 ]# rpm --import /tmp/fsx-rpm-public-key.asc
... 
[root@bright91 ]# vi /etc/yum.repos.d/aws-fsx.repo

change references from el/7/ to el/7.7/ and exit out of editor

[root@bright91 ]# yum clean all
... 
[root@bright91 ]# yum install -y kmod-lustre-client lustre-client
... 
[root@bright91 ]# exit

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2. Addition of the FSx tokens to the user profiles

Profiles (section 6.4 of the Administrator Manual) can be set for FSx users. Every user that should be able to create FSx for Lustre instances should have one or both of the following FSx tokens appended to their profile:

- `ON_DEMAND_FSX_TOKEN`
- `USER_MANAGED_FSX_TOKEN`.

Example

A user, `fred` is already using cluster extension with AWS, but without FSx. Now the user would like to launch and manage FSx storage on demand.

The existing profile of `fred` can be cloned in profile mode. The tokens needed can be appended to the new profile, and the modified profile can then be set for `fred`. The following `cmsh` session suggests how this can be carried out:

```
[bright91->user[fred]]% get profile cloudjob
[bright91->user[fred]]% profile
[bright91->profile]% clone cloudjob cloudjobfsx
[bright91->profile[cloudjobfsx]]% get tokens
SUBMIT_CLOUD_JOB_DESCRIPTION_TOKEN GET_CLOUD_JOB_DESCRIPTION_TOKEN
[bright91->profile[cloudjobfsx]]% append tokens ON_DEMAND_FSX_TOKEN USER_MANAGED_FSX_TOKEN
[bright91->profile[cloudjobfsx]]% get tokens
SUBMIT_CLOUD_JOB_DESCRIPTION_TOKEN ON_DEMAND_FSX_TOKEN USER_MANAGED_FSX_TOKEN
[bright91->profile[cloudjobfsx]]% commit
[bright91->profile[cloudjobfsx]]% user use fred
[bright91->user[fred]]% set profile cloudjobfsx
[bright91->user[fred]]% commit
```

When the two preceding actions have been carried out, the director and all compute nodes should be rebooted. A user should then be able to create and submit jobs with a user-managed FSx instance, or submit jobs with an OnDemand FSx instance, depending on which tokens were assigned to the profile of the user.

Configuration

Through `cmsh`, an administrator can set profile tokens (section 6.4 of the Administrator Manual) to control how users can work with FSx for Lustre. An administrator can also set quotas that control how many FSx instances a user can have simultaneously, and how large these FSx instances can be. The aim of this is to help manage costs.

Profile tokens: The following profile tokens are available for user management in FSx for Lustre:

- `ON_DEMAND_FSX_TOKEN`: allows a user to use the `--on-demand-fsx` flag when submitting jobs with `cmjob`.
- `USER_MANAGED_FSX_TOKEN`: allows a user to create, manage and delete FSx instances.
- `DELETE_ANY_FSX_INSTANCE_TOKEN`: allows a user to delete FSx instances that are owned by other users. Normally reserved for root only.
4.3 Submitting Jobs With cmjob And Cloud Storage Nodes, For Cluster Extension Clusters

- `LIST_ALL_FSX_INSTANCES_TOKEN`: allows a user to see FSx instances owned by other users that are not shared with that user. Normally reserved for root only.

- `SHARE_FSX_INSTANCE_TOKEN`: allows a user to share FSx instances with other users. Only the owner is allowed to share it. Normally reserved for root only.

**Settings:** The following `cmsh` navigation path:

```
cmsh→cmjob→storagenodepolicies→use <policy>→intermediatestorage
```

leads to these storage parameters:

- Max FSx Instance Capacity (GiB)
- Max FSx Instance Count Per User

which control quota limits for FSx instances.

Each quota affects both on-demand and user-managed FSx instances. So if a user has already reached the maximum number of user-managed FSx instances, then the user cannot submit a job that uses an OnDemand FSx instance.

The same navigation path also leads to the storage parameter:

- Default FSx Instance Capacity (GiB)

which controls the default capacity when a user or admin creates a user-managed or admin-managed FSx instance.

**Usage**

As listed earlier, the three methods that Bright Cluster Manager provides for `cmjob` integration with FSx for Lustre are:

1. on-demand FSx,
2. user-managed FSx, and
3. admin-managed FSx.

How to run these methods using `cmjob` is covered in the next sections.

**Using on-demand FSx:** When using `cmjob` to submit a job, a user can now choose whether to use EBS-backed storage nodes or an FSx for Lustre file system to host the input data and output data. For a user there is little difference between how two shared storage options are used, besides their performance.

The steps are:

1. an EBS volume or FSx for Lustre file system is created as shared storage,
2. the input data is copied from the head node to this shared storage,
3. all compute nodes chosen by the workload manager mount this shared storage, and then run their jobs,
4. storing their output data on the same shared storage.
5. the output data is uploaded from the shared storage to the head node
6. the EBS volume or FSx for Lustre file system is deleted.
Submitting a job to run with storage nodes is the default. If a user wants a job to use FSx for Lustre, then the user must set the `--on-demand-fsx` flag when submitting the job:

**Example**

```bash
cmjob submit --on-demand-fsx job.sh
```

The capacity of the on-demand FSx instance is determined by doubling the size of the input data. This calculation takes into account both the data uploaded from the head node, and labeled data downloaded from an S3 bucket. If the user thinks that the calculated capacity is not large enough to hold the output data (the output includes temporary data), then the capacity can be increased with the `--expected-output-size` option. The specified size is combined with the size of the input data and rounded up to the nearest valid FSx volume size. The option also works for EBS storage.

**Using user-managed FSx**: `cmjob` with a user-managed FSx file system operates differently from an on-demand system. With user-managed FSx, the user is responsible for creating and deleting the FSx file system.

In some cases this can be more expensive than using the on-demand approach, especially if the user forgets to delete an FSx instance after no longer needing it.

However with user-managed FSx a user can run multiple concurrent jobs with the same FSx file system. It is also possible to run multiple jobs in sequence, each using the output of the previous job as input, without having the overhead of copying files over from the FSx file system to an S3 bucket, and vice versa. Depending on the size of the workload, this option may be cheaper, or more desirable, than on-demand FSx.

To create an FSx instance, the user executes `cmjob` with the `create-fs-instance` option as follows:

**Example**

```bash
cmjob create-fsx-instance <name> --capacity <capacity>
```

`<name>` can be a sequence of alphanumeric characters and dashes, and `<capacity>` is the total size of the FSx file system in gigabytes and is ideally set to a multiple of 1200, to prevent rejection by AWS. If not specified, the default value is used. The name does not have to be unique.

To delete an FSx instance, the user can run `cmjob` with the `delete-fsx-instance` option:

**Example**

```bash
cmjob delete-fsx-instance <name or FSx ID>
```

If the name is not unique, then the user can always specify the FSx ID. The ID can be found using the `list-fsx-instances` option. This lists all existing FSx instances, their names, unique IDs and statuses:

**Example**

```bash
cmjob list-fsx-instances
```

Once the FSx instance has reached a status of `Available` (which can take a few minutes), it is possible to submit a job with this instance.

**Example**

```bash
cmjob submit job.sh --fsx-instance <name or FSx ID>
```
Using admin-managed FSx: Using cmjob with an admin-managed file system is very similar to using it with a user-managed file system. The main difference is that the admin is responsible for creating and deleting the file system, and that the file system of the admin is shared with specific users. To share the file system, the share-fsx-instance option can be run by the admin, together with the --with option, as follows:

Example

cmjob share-fsx-instance <name or FSx ID> --with <user names>

Users do not need FSx-specific tokens to submit a job with an FSx instance. Using this approach for user-managed FSx instances gives the cluster administrator more control over the creation and deletion of FSx instances. By managing profiles, the administrator is free to divide users into a group of users who are allowed to create and delete their own instances, and a group of users who are only allowed to submit jobs with instances that are shared with them.

To stop sharing an FSx instance, the admin can run the --stop-sharing option:

Example

cmjob share-fsx-instance <name or FSx ID> --stop-sharing

Tracking FSx costs: All FSx instances created via cmjob have a BCM owner tag assigned to them. This tag allows the cluster administrator to track the FSx costs on a per-user basis using AWS’s cost management capabilities.

4.4 Miscellaneous Cloud Tools

4.4.1 The cm-manipulate-internal-exclude-lists Tool

The cm-manipulate-internal-exclude-lists tool is not strictly restricted to cloud use, because it can be used outside the cloud. However it turns out to be useful for defining exclusions for cloud directors and edge directors. Its usage is:

# cm-manipulate-internal-exclude-lists -h

Usage: /cm/local/apps/cluster-tools/bin/cm-manipulate-internal-exclude-lists [OPTIONS]

Options:
- -n, --node <name> : hostname or type of node to be manipulated (default CloudNode)
- -d, --data <file> : set full exclude to contents of file
- -p, --path <path> : fspart path to update (default /cm/shared)
- -h, --help : show this help
- -f, --full : manipulate full exclude list (default)
- -s, --sync : manipulate sync exclude list
- -u, --update : manipulate update exclude list
- -g, --grab : manipulate grab exclude list
- -w, --grabnew : manipulate grabnew exclude list

Warning:
Only use this tool if you know what you’re doing!

An example is if /cm/shared is very large. Normally this would be copied over to the cloud director. Often many paths on that directory are not needed, and copying those paths over would waste resources.
In such a case, the command can be used to update the exclude lists for the cloud director so that the data transferred from /cm/shared to the cloud director is restricted. For example, restricting a cloud director <cloud-director> using the exclude lists excludelistfullinstall, excludelistsyncinstall, and excludelistupdate (section 5.6 of the Administrator Manual) can be specified with:

**Example**

```
# cm-manipulate-internal-exclude-lists --full --node <cloud-director> --data <file with the exclude paths>
# cm-manipulate-internal-exclude-lists --sync --node <cloud-director> --data <file with the exclude paths>
# cm-manipulate-internal-exclude-lists --update --node <cloud-director> --data <file with the exclude paths>
```

The format of `<file with the exclude paths>` is an rsync pattern. So if `useless` is a directory with content that is of no use to a cloud director, and the directory is under /cm/shared, then /cm/shared/useless can be excluded by placing a line:

```
- /useless
```

in the file specified for the --data option. There is no pre-existing exclude list that the file will overwrite. The /proc and /sys directories are appended to the list set.

### 4.4.2 The `provisioningassociations` Mode

The provisioningassociations mode, like the cm-manipulate-internal-exclude-lists tool (section 4.4.1), is not strictly restricted to cloud use, because it can also be used outside the cloud.

It allows direct access to provisioning associations via cmsh. This allows the exclude list of non-standard kinds of images to be changed in an even easier way than by using the cm-manipulate-internal-exclude-lists script. The provisioningassociations mode can be used, with care, to alter the exclude list for:

1. /cm/shared: as used by the cloud director
2. /cm/shared: as used by the edge director
3. /tftpboot: as used by the boot role
4. /cm/node-installer: as used by the boot role
5. `<image>`: for nodes with a provisioning role: for the image-to-image rsync to other provisioning nodes

The exclude lists for standard image-to-node sync to a regular (non-provisioning) node cannot be altered this way, and should be done in the normal category exclude list way (section 5.6 of the Administrator Manual).

Only excludelistsyncinstall is used for the 5 provisioning associations listed in the preceding text.

The provisioning associations and exclude lists can be accessed and modified for an edge director as follows:

**Example**

```
[bright91]% device use edge-director
[bright91->device[edge-director]]% roles
[bright91->device[edge-director]->roles]% use edgedirector
[bright91->device[edge-director]->roles[edgedirector]]% provisioningassociations
[bright91->device[edge-director]->roles[edgedirector]->provisioningassociations]% list

FS Part Sync point
```
4.5 Connecting To AWS With Direct Connect Or A Hardware VPN

For simple configurations, Bright Cluster Manager recommends, and provides, OpenVPN by default for cluster extension cloudbursting VPN connectivity. If there is a wish to use Direct Connect or a hardware VPN (for example, an IPSec tunnel), then Bright Cluster Manager can be configured to work with those.

The AWS cluster extension always runs in an AWS Virtual Private Cloud (VPC). In the default deployment scenario, the head node communicates with the cloud nodes using an OpenVPN connection between the head node and the cloud director. In the case of a Direct Connect connection or a hardware VPN, the head node can be configured to communicate directly with the cloud director and cloud nodes.

Setting up Direct Connect or a VPN for a cluster extension can be carried out according to these three steps:

1. VPC creation (section 4.5.1). This step can be skipped if an existing VPC is to be used.

2. Connecting the local network to the VPC (section 4.5.2). The connection can be with, for example, Direct Connect, or a hardware VPN. This step can be skipped if the local network is already connected to an existing VPC via a Direct Connect or a hardware VPN connection.

3. Configuring and deploying the cluster extension (section 4.5.3).

4.5.1 Creating a VPC

The Amazon Virtual Private Cloud (VPC) is a logically isolated section of the AWS cloud. A VPC allows complete control over the networking environment for cloud resources used by the cluster extension. The VPC enables the cloud director and cloud nodes to securely communicate with each other and can be extended to the local network of the cluster. Documentation for Amazon VPC can be found at:
A new VPC can be created and configured for the cluster extension as follows:

1. After logging in to the AWS management console, https://console.aws.amazon.com/console/, the following clickpath can be followed:
   Services → VPC → VPC Dashboard → VPCs → Create VPC.

2. An IPv4 CIDR block can be set to a desired range. This range should not conflict with the address space used on-premises. A possible range could be, for example: 10.42.0.0/16

3. Once the VPC range is set, a subnet can be set via the navigation options under:
   VIRTUAL PRIVATE CLOUD → Subnets → Create subnet.

4. The VPC created in step 2 is selected as the VPC during the Create subnet dialog. An IPv4 CIDR block that is a subnet of the VPC range must also be defined in the Create subnet dialog. A possible subnet range would be, for example: 10.42.0.0/24

4.5.2 Connecting The Local Network To The VPC

Amazon offers two options to connect the local network to the VPC: Direct Connect and VPN.

Connecting Via Direct Connect
To connect the local network to the VPC via Direct Connect requires a private virtual interface. Amazon’s instructions to use AWS Direct Connect to access a VPC are at:


Connecting Via A Site-To-Site Connection Using A VPN
Connecting an on-premises network to the virtual network using a VPN requires an Amazon Site-to-Site connection. Amazon’s instructions for configuring a site-to-site VPN connection are at:

https://docs.aws.amazon.com/vpn/latest/s2svpn/SetUpVPNConnections.html

The site-to-site connection consists of 4 components:

1. a customer gateway (routes traffic from VPC to local network)
2. a target gateway (routes traffic from local network to VPC)
3. a security group
4. a connection

The target gateway can either be a virtual private gateway or a transit gateway, depending on the configuration of the other AWS resources.

If the customer gateway device does not support BGP, then the site-to-site connection needs to be configured for static routing. The default Static IP Prefixes are: 10.141.0.0/16, 192.168.200.0/24.

4.5.3 Configuring And Deploying The Cluster Extension

Once IP connectivity from on-prem to the AWS virtual network is running, the final step is creating the cluster extension using the newly created site-to-site connection.
Getting Through Shorewall
First, the firewall rules on the head node must be adjusted to accept traffic from the subnet. The file /etc/shorewall/rules can be edited so that the net section allows packets from the CIDR subnet. A quick and dirty way to do it is to append to the file with:

```
[root@bright91 ~]# echo \"ACCEPT net:<subnet CIDR> fw - -\" >> /etc/shorewall/rules
[root@bright91 ~]# shorewall reload
```

Cluster Extension Advanced Settings Configuration
A cluster extension can now be created using the cm-cluster-extension utility in Ncurses mode as explained in section 4.1.1, page 57.

However, on reaching the summary screen (figure 4.6, page 59), the cluster administrator should not immediately select the Save config & deploy option, but should first go to the Advanced settings option, which opens up an Advanced plugin configuration screen (figure 4.17):

![Figure 4.17: Cluster Extension Configuration Processing: Advanced Plugins Screen](image)

The clusterextension option should be selected, which opens up an advanced options settings screen (figure 4.18):

![Figure 4.18: Cluster Extension Configuration Processing: Advanced Plugins For 'clusterextension' Options Screen](image)

In this screen:
- the Create tunnel networks option should be set to False
- the VPC for region <region> should be set to the VPC created for the cluster extension. The cluster extension is what is being connected to via Direct Connect or via a site-to-site connection
- The Security groups to use should be set for the cloud nodes and the cloud director.

Custom Security Groups Configuration
For the security group it is important to realize that the default security groups, as created by the cluster extension utility, do not accept traffic from the IPSec tunnel. It is recommended to create a custom security group, and to use that for both the director and the nodes. To create this security group:
1. From the AWS management console, the following clickpath is followed:

   VPC Dashboard → Security Groups → Create security group

2. The cluster extension VPC is selected

3. A new inbound rule is added, to accept all traffic from the cluster and the VPC. For example: 
   192.168.200.0/24 and 10.42.0.0/16.

   The Ncurses advanced settings screens can be backed out of by selecting Back twice. The option 
   Save config & deploy can then be selected to create the cluster extension.

Cloud Node Certificate Autosigning

By default Bright Cluster Manager does not issue certificates for nodes on the external network. This 
means that for cloud nodes the certificates need to be issued manually, once for every new cloud node.

Alternatively, to automatically sign certificate requests by cloud nodes, autosign can be enabled by 
the administrator for external networks. Autosigning may be a security concern, as this allows anyone 
on the external network to request a node certificate. Autosign can be enabled on externalnet in cmsh as 
follows:

[root@bright91~]# cmsh
[bright91]# network
[bright91->network]# set externalnet allowautosign always
[bright91->network]# commit

   The cluster extension can now be deployed as explained in section 4.1.2.
5

Cluster Extension Cloudbursting With Azure

5.1 Introduction To Cluster Extension Cloudbursting With Azure

Cluster extension cloudbursting with AWS is covered in Chapter 3, where a GUI approach is described, and is also covered in section 4.1, where a text interface approach is described.

Cluster extension cloudbursting with Microsoft Azure is covered in this chapter (Chapter 5). The procedure is somewhat similar to that for AWS:

- The prerequisites to cloudburst into Azure are the same as those of cloudbursting into AWS, and are as previously described on page 39.
  In summary, the prerequisites are as follows:
  - an activated cluster license should be ensured
  - an Azure account should exist
  - Bright Cluster Manager must be registered as an Azure AD application (page 80)
  - UDP port 1194 should be open

- The techniques to cloudburst into Azure are also the same as that of cloudbursting into AWS, and are as previously described on page 40.
  In summary, the techniques are as follows:
  - a cloud director is set up in the cloud then started up
  - cloud nodes are then provisioned from the cloud director

- The deployment of cluster extension cloudbursting for Azure is carried out in a similar way to how it is done for AWS.
  In summary, the tools used to deploy cluster extension cloudbursting for Azure are as follows:
  - the Ncurses cm-cluster-extension utility, run from the command line (section 5.2)
  - the Azure Wizard, run from Bright View.

5.2 Cluster Extension Into Azure

Section 4.1.1 introduces the cm-cluster-extension Ncurses wizard, which is run on the head node when configuring a cluster extension for Azure or AWS. After the cluster extension configuration is completed, the cluster is capable of extending into the cloud by having cloud nodes power up into the cloud. This section (section 5.2) covers how cm-cluster-extension can be run for Azure, and how clouds nodes can be deployed for Azure.

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There is also a Bright View browser-based wizard for cluster extension into Azure. The browser wizard is accessible via the clickpath: Cloud→Azure→Azure Wizard. If the browser wizard is used, then the documentation here (section 5.2) for cm-cluster-extension can be followed since it is a very similar procedure.

**Running The cm-cluster-extension Command Line Options As A Shell Dialog**

The cm-cluster-extension utility can be run as a dialog from the command line environment, as described in the section starting from page 55. Running it as an Ncurses dialog is however easier, and is described next.

**Running The cm-cluster-extension Ncurses Dialog For Cluster Extension Into Azure**

The cm-cluster-extension utility can be run as a more user-friendly Ncurses session within the text environment. In a session described starting from page 57, an AWS cluster extension configuration is generated and deployed. In the session that is now described here, an Azure cluster extension configuration is generated and deployed instead:

As in the AWS case, the cm-cluster-extension script is run without options, to bring up the Ncurses main screen (figure 5.1):

![Figure 5.1: Configuration Processing With cm-cluster-extension: Azure Selection](image)

The Azure option is selected in this session instead of the AWS option. The next screen is then the Azure credentials screen (figure 5.2):

![Figure 5.2: Configuration Processing With cm-cluster-extension: Azure Credentials](image)

The inputs that are required here are Azure credentials, and exist for an activated Azure account which has had Bright Cluster Manager registered as an application.

**How Bright Cluster Manager can be registered as an Azure application:** Registration of an Azure application can be carried out with the Azure portal at https://portal.azure.com. The portal is accessible with an active Azure account. After logging in, navigating to locations via clickpaths described
next is possible. The steps to ensure a registration are then as follows:

- User settings should first be checked to see if users can register applications. A clickpath to view
  this is:
  Azure Active Directory → User settings → Users can register applications
  The state should be set to yes.

- The subscriptions should be checked for permissions. The clickpath to view subscriptions is sim-
  ply:
  Subscriptions
  Within the subscription display the role can be viewed to determine if the account
  has adequate permissions to assign an AD application to a role. The account must
  have Microsoft.Authorization/*/Write access to assign an Azure AD application to
  a role. Assigning the Contributor role allows this access. Role-based access con-
  trol (RBAC) is discussed at https://docs.microsoft.com/en-us/azure/active-directory/
  role-based-access-control-manage-access-rest

- The user, for example, <fred>, should be checked for permissions. A suitable clickpath would be:
  Azure Active Directory → Users and groups → <fred> → Azure resources
  The Azure resources for the user, who is assigned the subscription, should show the role and
  assignment value. Suitable settings would be:

    ROLE: Contributor
    ASSIGNED TO: <fred>

- Network, Compute, and Storage namespaces must be registered.
  A convenient way to check that this is the case, is to use the Azure CLI tool from the head node.
  Instructions for installing it are available at https://docs.microsoft.com/en-us/cli/azure/
  install-azure-cli.
  After installation, a list of namespaces can be seen by running:

  az provider list --query "[].{Provider:namespace, Status:registrationState}" --out table

  If the tool is run for the first time, then the tool gives the user a code and a URL. Using these, the
  user can authenticate the head node via a web browser.
  The required namespaces can be registered, if needed, with:

  az provider register --namespace Microsoft.Network --wait
  az provider register --namespace Microsoft.Compute --wait
  az provider register --namespace Microsoft.Storage --wait
  az provider register --namespace Microsoft.ADHybridHealthService --wait
  az provider register --namespace Microsoft.Authorization --wait
  az provider register --namespace Microsoft.Billing --wait
  az provider register --namespace Microsoft.ClassicSubscription --wait
  az provider register --namespace Microsoft.Commerce --wait
  az provider register --namespace Microsoft.Consumption --wait
  az provider register --namespace Microsoft.Features --wait
  az provider register --namespace Microsoft.MarketplaceOrdering --wait
  az provider register --namespace Microsoft.Resources --wait
  az provider register --namespace Microsoft.support --wait

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• Create Azure Active Directory application:

With all the permissions in place, the application can now be registered via the clickpath: Azure Active Directory → App registrations

The application name and application URL values can be arbitrary since they are not actually used by cm-cluster-extension. The application type should be set to: Web app / API

• The Client ID and Client Secret values are only available to Azure admin users, or the Azure application owners. Regular users cannot obtain these values.

If the security settings allow Azure users to define their own Azure applications, then they can in theory create their own Azure application under the subscription, and use the data for that Azure application to get a Client ID and Client Secret.

The credentials can now be picked up from the Azure portal account via the clickpaths shown in the following table:

<table>
<thead>
<tr>
<th>Ncurses</th>
<th>Clickpath From Azure Portal Menu After Azure Portal Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscription ID</td>
<td>Subscriptions → SUBSCRIPTION ID</td>
</tr>
<tr>
<td>Tenant ID</td>
<td>Azure Active Directory → Properties → Directory ID</td>
</tr>
<tr>
<td>Client ID</td>
<td>Azure Active Directory → App registrations → APPLICATION ID</td>
</tr>
<tr>
<td>Client Secret</td>
<td>Azure Active Directory → App registrations → APPLICATION ID → Keys → [the generated key must be noted]</td>
</tr>
</tbody>
</table>

*After filling in the DESCRIPTION and EXPIRES fields at the end of this clickpath, and saving the values, the key is generated, and displayed once. The key must be noted down by the user because it cannot be retrieved.

The Provider Name in figure 5.2 can be set to any user-defined value. For Azure, a sensible, if unimaginative value, is simply azure.

After the credentials have been accepted, then Azure regions can be selected (figure 5.3):

Please select the region(s) to which you would like to extend your cluster to.

The setup process will later create and configure a VNE for each selected region.

You can always add and configure additional regions later on.

```
< 1 > < Back > < Help >
```

Figure 5.3: Configuration Processing With cm-cluster-extension: Azure Regions

Azure regions are regional data centers, and the cloud director for a region helps manage the regular cloud nodes in that region when the cluster is extended into there.

The default instance type for the regular cloud nodes is then set (figure 5.4):
A default Azure virtual machine type that works well for general cloud node purposes is the D1_v2 type. There are many possible machine types, and they are documented online at https://docs.microsoft.com/en-us/azure/virtual-machines/windows/sizes. A summary listing of the supported types can be viewed in cmsh with:

[root@b80 ~]# cmsh -c "cloud use azure ; types ; list"

or via the Bright View clickpath:

Cloud→Azure→Azure VM Sizes

The default instance type for the cloud directors is then set (figure 5.5):

The same default size of the D1_v2 type that works for regular cloud nodes is typically adequate for cloud director nodes too, for small clusters.

The summary screen (figure 5.6) allows the administrator to look over the configuration before deployment:
As in the AWS summary screen, the Azure summary screen allows the following:

- An administrator can just go ahead, save the configuration, and deploy the cluster extension. This is usually the expected action.

- The configuration settings YAML file can be viewed. To scroll, the PageUp and PageDown keys are used.

- An advanced configuration settings screen can be accessed in addition to the standard settings. The advanced settings are usually left alone.

- The configuration file, `<configuration file>`, is `cm-cluster-extension.conf` by default. The file can be saved, by default to the home directory of the user. On exiting the Ncurses dialog, deployment with that configuration can be carried out manually by running:

  ```
  cm-cluster-extension -c `<configuration file>`
  ```

**Deployment Of An Azure Configuration Created With cm-cluster-extension**

During configuration deployment, as the configuration is processed, text output indicates the progress. At the end of processing, the message

**Azure Cloud extension configuration finished**

indicates that the cluster has been extended successfully.

No nodes are activated yet within Azure. To start them up, the components of the cluster extension service for Azure must be started up by

- powering up the cloud directors, as introduced for AWS in section 3.2. The procedure for Azure is similar.

- powering on the cloud nodes after the cloud directors are up. This may require first creating new cloud nodes, as introduced for AWS in section 3.3. The procedure for Azure is similar.

When powering up, the cloud director can be installed from scratch (section 3.2), or from a snapshot. For example, running the `power on` command from the device mode of `cmsh` on a head node shows amongst others the following states (some output elided or ellipsized):

**Example**

```
[bright91->device]# power on westeurope-director
cloud ....................... [ PENDING ] westeurope-director
... [notice] bright91: New certificate request with ID: 9
... [notice] bright91: westeurope-director [ INSTALLER REBOOTING ]
... [notice] bright91: westeurope-director [ INSTALLING ] (node installer started)
```
... [notice] bright91: New certificate request with ID: 10 (ldaps)
... [notice] bright91: westeurope-director [ INSTALLER_CALLINGINIT ] (switching to local root)
... [notice] bright91: westeurope-director [ UP ]

Example

[root@bright91 ~]# ps uww -C rsync | grep -o ' /cm/.*$'
/cm/shared/ syncret@172.21.255.251::target//cm/shared/

Tracking Cloud Node Startup From cmsh
The provisioningstatus command in the softwareimage mode of cmsh can be used to view the provision- 
ing status of cloud directors from the head node, or of cloud nodes from the cloud director (some output elided):

Example

[root@bright91 ~]# cmsh -c "softwareimage provisioningstatus"
... + westeurope-director
...     Up to date images: none
...     Out of date images: default-image
...     Nodegroups: westeurope-director-dependents

In the preceding output, the absence of an entry for “Up to date images” shows that the cloud 
director does not yet have an image that it can provision to the cloud nodes. After some time, the last 
few lines of output should change to something like:

Example

+ westeurope-director
...     Up to date images: default-image
...     Nodegroups: westeurope-director-dependents

This indicates the image for the cloud nodes is now ready. The image used for a device is defined by 
the value of image under cloudsettings for the cloud director, or cloud node:

Example

[root@bright91 ~]# cmsh -c "device use westeurope-director; cloudsettings; get image"
marketplace-free-node-installer-image

By default, this value is the Azure marketplace image for the current Bright Cluster Manager version.
With the -a option, the provisioningstatus -a command gives details that may be helpful. For 
example, while the cloud director is having the default software image placed on it for provisioning 
purposes, the source and destination paths are /cm/images/default-image:

Example

[root@bright91 ~]# cmsh -c "softwareimage provisioningstatus -a"
Request ID(s): 4
Source node: bright91
Source path: /cm/images/default-image
Destination node: westeurope-director
Destination path: /cm/images/default-image
...
After some time, when the shared filesystem is being provisioned, then an indication of progress is shown by the Request ID incrementing, and the source and destination paths changing to the /cm/shared directory:

```
[root@bright91 ~]# cmsh -c "softwareimage provisioningstatus -a"
Request ID(s): 5
Source node: bright91
Source path: /cm/shared
Destination node: westeurope-director
Destination path: /cm/shared
...
```

After the shared directory and the cloud node software images are provisioned, the cloud director is fully up. Cloud node instances can then be powered up and provisioned from the cloud director. The instances can be started up from scratch (section 3.2), or from snapshot (section 3.4).

**Cluster Extension Cloudbursting Logging**

All Azure logging goes to the CMDaemon log in /var/log/cmdaemon, where the CLOUD tag is used to indicate cloud-related operations.

### 5.3 Cluster Extension Into Azure: Cloud Node Startup From Scratch

This section discusses the configuration of regular cloud node startup from scratch.\(^1\)

To configure regular cloud nodes in Azure from scratch does not require a working cloud director. However to boot up the regular cloud nodes does require that the cloud director be up, and that the associated networks to the regular cloud nodes and to the head node be configured correctly.

If needed, additional cloud provisioning nodes (section 5.2 of the Administrator Manual) can be configured by assigning the provisioning role to cloud nodes, along with appropriate nodegroups (page 163 of the Administrator Manual) values, in order to create a provisioning hierarchy.

Similarly to how it is done in AWS, the creation and configuration of regular cloud node objects in Azure is conveniently carried out by cloning another regular cloud node, from one of the default cloud nodes already created by the cluster extension wizard (section 5.2). A clickpath to do this cloning in Bright View is:

```
Devices→Cloud Nodes→<cloud node hostname>→↓Clone
```

Cloud node objects can also be created in cmsh as described in section 4.2.

### 5.4 Cluster Extension Into Azure: shutdown Vs power off

An Azure cloud node has two stopped states:

1. stopped: A node running within Azure can be set to this state by running the shutdown command:
   
   - within the device mode of cmsh
   - with Bright View, using the clickpath:
     
     Devices → Cloud Nodes → <cloud node hostname> → ↓OS → Shutdown
   
   - Or by clicking the stop button for that node within the Azure web portal, once.

2. stopped (deallocating): A node running within Azure can be set to this state by running the power off command:

\(^1\)The configuration of cloud director and node startup from snapshot is also possible. How to do this for AWS is discussed in section 3.4. Doing this for Azure is rather more complicated and confusing. At the time of writing (August 2017), configuring this is therefore planned as a wizard-assisted option for a future version of Bright Cluster Manager, with a priority that depends on the level of interest for this feature from customers.
• within the device mode of cmsh
• with Bright View, using the clickpath:
  Devices→Cloud Nodes→<cloud node hostname>→Power→Off
• Or by clicking on the stop button within the Azure web portal, twice.

Carrying out a power off command is like a hard power off command, which can under some unusual conditions cause filesystem corruption. It is therefore safer to run the shut down command first, wait for the node to shut down via the OS. After that, running the power off command ensures that the node is deallocated.

From a financial point of view when using Azure, a node that is shut down but not deallocated continues to incur costs. However, a node that is deallocated does not continue to incur costs.

5.5 Submitting Jobs With cmjob And Cloud Storage Nodes, For Azure Cluster Extension Clusters

The cmjob utility, a job submission wrapper for end users for cluster extension clusters, is introduced and documented for AWS cluster extension in section 4.3. As a summary, its configuration procedure consists of:

• Making sure the cmdaemon-cmjob package is installed on the head node and the cloud image
• Ensuring the users that are to use cmjob have the cloudjob profile
• Making sure that cloud storage nodes are set up. The administrator can run cm-cloud-storage-setup to configure the cloud storage nodes.

The details of the configuration procedure for cmjob for Azure cluster extension is almost identical to that for AWS. The configuration procedure documented in section 4.3 can therefore also be followed for Azure.

How the end user can use cmjob is documented in section 4.7 of the User Manual.

5.5.1 Integration Of cmjob With Azure NetApp Files

Azure NetApp Files (ANF) is a high-performance highly scalable network file service that is available as a cloud service within most Azure regions. A Bright cluster that has burst into such a region can use ANF to create a shared storage volume that can be read from, and can be written to, by many compute nodes simultaneously.

On a cluster that has burst into such a region, cmjob can provide workload managers with an ANF volume to store input and output data.

Sequential workload manager jobs can use the same ANF volume. This means that the output of one job can immediately become the input of the next one without having to transmit the data to and from Azure cloud storage, or to and from the head node.

Additionally, workload manager jobs that run on multiple compute nodes in parallel can obtain their shared input from the same ANF volume.

Providing shared storage to cloud compute nodes via ANF is an alternative to providing it via cloud storage nodes (section 4.3). The storage node approach is not sufficiently scalable when there are more than several dozen compute nodes working simultaneously with the same storage node. ANF is significantly more scalable and far more performant, although at a higher cost.

Bright Cluster Manager currently offer three different methods of integrating cmjob with Azure NetApp Files:

1. On-Demand ANF: An ANF file system is created on a per-job basis and is deleted automatically when the job completes.
2. **User-managed ANF**: A user creates an ANF volume and then submits one or more jobs that use that same ANF volume. These jobs can execute in sequence or simultaneously. When the last job has finished, the user is responsible for deleting the ANF volume.

3. **Admin-managed ANF**: An administrator creates an ANF volume and shares it with one or more users. These users are able to use the volume in the same way as with user-managed ANF, but they cannot delete the volume or see each other’s files.

**Prerequisite**

To be able to use the integration of cmjob with ANF NetApp Files, the cluster must be bursting into an Azure region that supports Azure NetApp Files. Azure does not offer this feature in all regions. The Azure documentation should be checked to see if a region offers ANF for Azure.

**Enabling cmjob Integration With Azure NetApp**

The integration of cmjob with ANF can be accomplished in two ways, either:

- through the `cm-cloud-storage-setup` wizard (section 4.3.1)

or

- manually

During the `cm-cloud-storage-setup` wizard run, when the guidance for the Azure extension is being carried out, the administrator is asked if ANF support should be enabled. If the administrator agrees to this, then ANF support is set up. After the deployment has finished, all users that have the `cloudjob` profile can then create user-managed and on-demand ANF volumes through cmjob.

**Enabling cmjob integration manually**: The manual integration approach should be followed when cmjob has already been configured on a cluster. That is, if the `cm-cloud-storage-setup` tool has been run, but the cluster has been running without ANF support so far.

To add cmjob integration with ANF manually, the following manual action is all that is needed:

Every user that should be able to create ANF volumes should have one or both of these tokens set on their profile (profiles are explained in section 6.4 of the *Administrator Manual*):

- `ON_DEMAND_ANF_TOKEN`
- `USER_MANAGED_ANF_TOKEN`.

**Example**

A user, fred is already using cluster extension with Azure, but without ANF. Now the user would like to be able to launch and manage ANF storage on demand.

To allow fred to do that, the steps that are carried out could be as follows: The existing profile of fred can be cloned in profile mode. The tokens needed can be appended to the new profile, and the modified profile can then be set for fred.

The following cmsh session shows these steps:

```
[bright91->user[fred]]% get profile
cloudjob
[bright91->user[fred]]% profile
[bright91->profile]% clone cloudjob cloudjobanf
[bright91->profile*[cloudjobanf*]]% get tokens
SUBMIT_CLOUD_JOB_DESCRIPTION_TOKEN
GET_CLOUD_JOB_DESCRIPTION_TOKEN
[bright91->profile*[cloudjobanf*]]% append tokens ON_DEMAND_ANF_TOKEN USER_MANAGED_ANF_TOKEN
[bright91->profile*[cloudjobanf*]]% get tokens
```

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5.5 Submitting Jobs With cmjob And Cloud Storage Nodes, For Azure Cluster Extension Clusters

SUBMIT_CLOUD_JOB_DESCRIPTION_TOKEN
GET_CLOUD_JOB_DESCRIPTION_TOKEN
ON_DEMAND_ANF_TOKEN
USER_MANAGED_ANF_TOKEN

[bright91->profile*[cloudjobanf*]]% commit
[bright91->profile[cloudjobanf]]% user use fred
[bright91->user[fred]]% set profile cloudjobanf
[bright91->user*[fred*]]% commit

No directors need to be updated or rebooted when the necessary user profiles have been updated. All users with profiles with those ANF tokens should then be able to create and submit jobs with a user-managed ANF volume, or submit jobs with an on-demand ANF volume, depending on which tokens were assigned to the profile of the user.

Configuration

Through cmsh, an administrator can use profile tokens (section 6.4 of the Administrator Manual) to control how users can work with ANF. An administrator can also set quotas that control how many ANF volumes a user can have simultaneously and how large these ANF volumes can be. The aim of this is to help manage costs.

Profile tokens:

- **ON_DEMAND_ANF_TOKEN**: allows a user to use the `--on-demand-anf` flag when submitting jobs with cmjob.
- **USER_MANAGED_ANF_TOKEN**: allows a user to create, manage and delete ANF volumes.
- **DELETE_ANY_ANF_VOLUME_TOKEN**: allows a user to delete ANF volumes that are owned by other users. Normally reserved for root only.
- **LIST_ALL_ANF_VOLUMES_TOKEN**: allows a user to see ANF volumes owned by other users. Normally reserved for root only.
- **SHARE_ANF_VOLUME_TOKEN**: allows a user to share ANF volumes with other users. Only the owner is allowed to share it. Normally reserved for root only.

Settings: The following cmsh navigation path

```
cmsh→cmjob→storagenodepolicies→use <policy>→intermediatestorage
```

leads to these storage parameters:

- Max ANF Volume Capacity (TiB)
- Max ANF Volume Count Per User

which control quota limits for ANF volumes for the number and size of ANF volumes, for when a user or an administrator creates a user-managed or administrator-managed ANF volume. The count is combined. If a user has already reached the maximum number of user-managed ANF volumes, then the user cannot submit a job that uses an on-demand ANF volume.

Also in the same navigation path is the storage parameter:

- Default ANF Volume Capacity (TiB)

which controls the default capacity when a user or admin creates a user-managed or admin-managed ANF volume.

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Usage
As listed earlier, the three methods that Bright Cluster Manager provides for cmjob integration with ANF are:

1. on-demand ANF,
2. user-managed ANF, and
3. admin-managed ANF.

How to run these methods using cmjob is covered in the next sections.

Using on-demand ANF: When using cmjob to submit a job, a user can choose whether to use an Azure storage volume or an ANF file system to host the input data and output data. For a user there is little difference between the ways in which the two shared storage options are used, beside performance.

The steps are:

1. an Azure storage volume or an ANF file system is created as shared storage,
2. the input data is copied from the head node to this shared storage
3. all compute nodes chosen by the workload manager mount this shared storage, and then run their jobs,
4. storing their output data on the same shared storage.
5. the output data is uploaded from the shared storage to the head node
6. the Azure volume or ANF file system is deleted.

Submitting a job to run with Azure storage nodes is the default.

If a user wants a job to use ANF, then the user must set the --on-demand-anf flag when submitting the job:

Example

```
cmjob submit --on-demand-anf job.sh
```

The capacity of the OnDemand ANF volume is determined by doubling the size of the input data. This calculation takes into account both the data uploaded from the head node, and labeled data downloaded from the Azure cloud storage. If the user thinks that the calculated capacity is not large enough to hold the output data (the output includes temporary data), then the user can increase the capacity with the --expected-output-size parameter. The specified size is combined with the size of the input data and rounded up to the nearest valid ANF volume size.

Using user-managed ANF cmjob with a user-managed ANF file system operates differently from an on-demand system. With user-managed ANF, the user is responsible for creating and deleting the ANF file system.

In some cases, this can be more expensive than using the on-demand approach, especially if the user forgets to delete the ANF volume after no longer needing it.

However, with user-managed ANF a user can run multiple concurrent jobs with the same ANF file system. It is also possible to run multiple jobs in sequence, each using the output of the previous job as input, without having the overhead of the files being copied from the ANF file system to Azure cloud storage, and vice versa. Depending on the size of the workload, this option may be cheaper, or more desirable, than on-demand ANF.

To create an ANF volume, the user can execute cmjob with the create-anf-volume option:
### 5.5 Submitting Jobs With `cmjob` And Cloud Storage Nodes, For Azure Cluster Extension Clusters

#### Example

```bash
cmjob create-anf-volume <name or ID> --capacity <capacity>
```

Here:

- `<name or ID>` can be a sequence of alphanumeric characters and dashes. It does not have to be unique.

- `<capacity>` is the total size of the ANF file system in terabytes. If not specified, the default value is used. The default value can be managed via:
  ```bash
cmsh→cmjob→storagenodepolicies→use <policy>→intermediatestorage.
```

To delete an ANF volume, a user can run `cmjob` with the `delete-anf-volume` option:

```bash
cmjob delete-anf-volume <name or ID>
```

To obtain a list of all existing ANF volumes with their names and statuses, the user can run `cmjob` with the `list-anf-volumes` option:

```bash
cmjob list-anf-volumes
```

Once the ANF volume has reached a status of `AVAILABLE` (which can take a few minutes), it is possible to submit a job with this volume name or ID with the `--anf-volume` option.

```bash
cmjob submit job.sh --anf-volume <name or ID>
```

#### Using admin-managed ANF

Using `cmjob` with an admin-managed file system is very similar to using it with a user-managed file system. The main difference is that the administrator is responsible for creating and deleting the file system, and that the file system of the administrator is shared with specific users. To share the file system, the `share-anf-volume` option can be run by the administrator, together with the `--with` option, as follows:

```bash
cmjob share-anf-volume <name or ID> --with <user names>
```

With admin-managed ANF, users do not need any ANF-specific tokens to submit a job with an ANF volume. Using admin-managed ANF volumes instead of user-managed ANF volumes gives the administrator more control over the creation and deletion of ANF volumes. By managing profiles, the administrator is free to divide users into a group of users that are allowed to create and delete their own volumes, and a group of users that are only allowed to submit jobs with volumes that are shared with them.

To stop sharing the ANF volume, the admin can run the `--stop-sharing` option:

```bash
cmjob share-anf-volume <name or ID> --stop-sharing
```

#### Tracking NetApp costs:

All Azure NetApp Files capacity pools created via `cmjob` have a `BCM Owner` tag assigned to them. This tag allows the cluster administrator to track the NetApp costs on a per-user basis using Azure's cost management capabilities.

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5.6 Creating An Azure Cluster Extension Using ExpressRoute Or A Hardware VPN

For simple configurations, Bright Cluster Manager recommends, and provides, OpenVPN by default for cluster extension cloudbursting VPN connectivity. If there is a wish to use Direct Connect or a hardware VPN (for example, an IPSec tunnel), then Bright Cluster Manager can be configured to work with those.

The Azure cluster extension always runs in an Azure Virtual Network. In the default deployment scenario, the head node communicates with the cloud nodes using an OpenVPN connection between the head node and the cloud director. In the case of an ExpressRoute connection or a hardware VPN, the head node can be configured to communicate directly with the cloud director and cloud nodes.

Setting up ExpressRoute or a VPN for a cluster extension can be carried out according to these three steps:

1. Virtual network creation (section 5.6.1). This step can be skipped if an existing virtual network is to be used.
2. Connecting the local network to the virtual network (section 5.6.2). The connection can be with, for example, ExpressRoute, or a hardware VPN. This step can be skipped if the local network is already connected to an existing virtual network via an ExpressRoute or a hardware VPN connection.
3. Configuring and deploying the cluster extension (section 5.6.3).

5.6.1 Creating A Virtual Network

The Azure virtual network is the fundamental building block for building private networks in Azure. A virtual network allows the cloud director and cloud nodes to communicate with each other securely, and can be extended to the on-premise networks. Documentation for creating a virtual network can be found at:


A new virtual network can be created and configured for the cluster extension as follows:

1. After logging in to the Azure portal, https://portal.azure.com, from the home page, https://portal.azure.com/#home, the following clickpath can be followed:

   + Create a resource → Azure Marketplace → Networking → Virtual network
5.6 Creating An Azure Cluster Extension Using ExpressRoute Or A Hardware VPN

Figure 5.7: Azure Marketplace Networking Screen

2. A resource group should be selected or a new resource group should be created for the virtual network in the Basics tab:
3. An IPv4 CIDR block can be set to a desired range via the IP Addresses tab, reached by clicking on the Next: IP Addresses button:
This range should not conflict with the address space used on-premises. A possible range could be, for example, 10.77.0.0/16.

4. Once the virtual network range is set, a subnet can be entered via the + Add subnet option, which opens up a dialog.
A possible subnet could be, for example, 10.77.0.0/24. The Add button then adds it.

5. The clickpath:

Review + create → Create

...goes on to deploy the virtual network.

5.6.2 Connecting The Local Network To The Virtual Network

Azure offers two virtual network gateway types to connect the local network to the virtual network: ExpressRoute and VPN.

Connecting Via ExpressRoute

To connect the local network to the virtual network via ExpressRoute requires using an ExpressRoute circuit connection. Azure’s instructions for this are at:


Connecting Via A Site-To-Site Connection Using A VPN

Connecting an on-premises network to the virtual network using a VPN requires an Azure site-to-site connection. Azure’s instructions for configuring a site-to-site IPSec VPN connection are at:

5.6 Creating An Azure Cluster Extension Using ExpressRoute Or A Hardware VPN

In Azure this consists of three components:

1. a virtual network gateway (routes traffic from local network to virtual network)
2. a local network gateway (routes traffic from virtual network to local network)
3. a connection

The local network gateway needs to define the address ranges of the local network. The default address ranges for the local network are: 10.141.0.0/16, 10.2.0.0/16, and 192.168.200.0/24.

The virtual network gateway requires a gateway subnet. The address range for the gateway subnet should be a subnet of the virtual network that does not overlap with the subnet address range for the cluster extension, for example: 10.77.1.0/24.

5.6.3 Configuring And Deploying The Cluster Extension

Once IP connectivity from on-prem to the Azure virtual network is running, the final step is creating the cluster extension using the newly created site-to-site connection.

Getting Through Shorewall

First, the firewall rules on the head node must be adjusted to accept traffic from the virtual network. The file /etc/shorewall/rules can be edited so that the net section allows packets from the CIDR subnet. A quick-and-dirty way to do it is to append to the file with:

```
[root@bright91 ~]# echo "ACCEPT net:<subnet CIDR> fw - -" >> /etc/shorewall/rules
[root@bright91 ~]# shorewall reload
```

Cluster Extension Advanced Settings Configuration

A cluster extension can now be created using the cm-cluster-extension utility in Ncurses mode as explained in section 5.2.

However, on reaching the summary screen (figure 5.6, page 84), the cluster administrator should not immediately select the Save config & deploy option, but should first go to the Advanced settings option, which opens up an Advanced plugin configuration screen (figure 5.11):

```
Figure 5.11: Cluster Extension Configuration Processing: Advanced Plugins Screen
```

The clusterextension option should be selected, which opens up an advanced options settings screen for Azure (figure 5.12):

```
Figure 5.12: Cluster Extension Configuration Processing: Advanced Plugins For 'clusterextension', Azure Options Screen
```

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In this screen:

- the *Create tunnel networks* option should be set to `False`
- the *Subnet for region* `<region>` should be set to the subnet that has been created for the cluster extension. The cluster extension is what is being connected to via ExpressRoute or via site-to-site connection

The Ncurses advanced settings screens can be backed out of by selecting `Back` twice. The option `Save config & deploy` can then be selected to create the cluster extension.

**Cloud Node Certificate Autosigning**

By default Bright Cluster Manager does not issue certificates for nodes on the external network. This means that for cloud nodes the certificates need to be issued manually, once for every new cloud node.

Alternatively, to automatically sign certificate requests by cloud nodes, autosign can be enabled by the administrator for external networks. Autosigning may be a security concern, as this allows anyone on the external network to request a node certificate. Autosign can be enabled on `externalnet` in `cmsh` as follows:

```
[root@bright91~]# cmsh
[bright91]# network
[bright91->network]# set externalnet allowautosign always
[bright91->network]# commit
```

The cluster extension can now be deployed as explained on page 84.
Cloud Considerations And Choices With Bright Cluster Manager

6.1 Differences Between Cluster On Demand And Cluster Extension

Some explicit differences between Cluster On Demand and Cluster Extension clusters are:

<table>
<thead>
<tr>
<th>Cluster On Demand</th>
<th>Cluster Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>cloud nodes only in 1 region</td>
<td>cloud nodes can use many regions</td>
</tr>
<tr>
<td>no cloud director</td>
<td>uses one or more cloud directors per region</td>
</tr>
<tr>
<td>no failover head node</td>
<td>failover head node possible</td>
</tr>
<tr>
<td>no VPN or NetMap</td>
<td>VPN and NetMap</td>
</tr>
<tr>
<td>no externalnet interface on head</td>
<td>can have an external interface</td>
</tr>
<tr>
<td>cluster has publicly accessible IP address</td>
<td>cloud directors have publicly accessible IP addresses</td>
</tr>
</tbody>
</table>

A note about the last entry: The access to the cloud director addresses can be restricted to an administrator-defined set of IP addresses, using the “Externally visible IP” entry in figure 3.1 of the Administrator Manual.

6.2 Hardware And Software Availability

Bright Computing head node AMIs are available for the following distributions: RHEL7 and CentOS7.

AMIs with GPU computing instances are available with Amazon cloud computing services, and can be used with Bright Computing AMIs with hvm in the name (not xen in the name).

To power the system off, a `shutdown -h now` can be used, or the power commands for Bright View or cmsh can be executed. These commands stop the instance, without terminating it. Any associated extra drives that were created need to be removed manually, via the Volumes screen in the Elastic Block Store resource item in the navigation menu of the AWS Management Console.

6.3 Reducing Running Costs

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6.3.1 Spot Pricing

The spot price field is a mechanism to take advantage of cheaper pricing made available at irregular times. The mechanism allows the user to decide a threshold spot price (a price quote) in US dollars per hour for instances. Instances that run while under the threshold are called spot instances. Spot instances are described further at http://aws.amazon.com/ec2/spot-instances/.

With the pricing threshold set:

- If the set spot price threshold is above the instantaneous spot price, then the spot instances run.
- If the set spot price threshold is below the instantaneous spot price, then the spot instances are killed.
- If the set spot price threshold is N/A, then no conditions apply, and the instances will run on demand regardless of the instantaneous spot price.

An on demand instance is one that runs regardless of the price, according to the pricing at http://aws.amazon.com/ec2/pricing/.

A persistent request is one that will retry running a spot instance if the conditions allow it.

6.3.2 Storage Space Reduction

Reducing the amount of EBS disk storage used per cloud node or per cloud director is often feasible. 15 GB is usually enough for a cloud director, and 5 GB is usually enough for a cloud node with common requirements. In cmsh these values can be set with:

Example

[bright91]% device cloudsettings eu-west-1-director
[bright91->device[eu-west-1-director]->cloudsettings]% storage
[bright91->...->cloudsettings->storage]% set ebs size 15GB; commit
[bright91->...->cloudsettings->storage]% device cloudsettings cnode001
[bright91->device[cnode001]->cloudsettings]% storage
[bright91->...->cloudsettings->storage]% set ebs size 5GB; commit

The value for the cloud node EBS storage can also be set via Bright View, using the clickpath:

Devices → Cloud Nodes → Edit → Settings → Cloud settings → STORAGE → Storage → ebs → Edit → size

6.4 Ignoring Prepaid Node Limits

By default a user is restricted by the cloud licence from running more VMs in the cloud than a limit set within the license. This is a wise default, because as a general principle cluster administrators wish to keep costs within a planned budget.

However, there are times when a cluster administrator may wish to ignore this restriction. Ignoring the restriction is possible—at a price.

A use case for this might be a cluster that uses only a regular amount of cloudbursting most of the time, but on certain rare days it may need to burst beyond this regular amount.

Another use case might be an IT department that runs a cluster, suddenly finds itself with a large amount of unused budget, and it turns out that it is sensible to use the budget up on bursting runs.

How to allow bursting past the prepaid limit is described in the following sections for AWS (section 6.4.1) and for Azure (section 6.4.2).

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6.4 Ignoring Prepaid Node Limits

6.4.1 Bursting Past The Prepaid Limit In AWS

Node-installer Image Types For AWS Cloud Nodes

Bright Cluster Manager version 9.0 introduced a way to set the node-installer image type for AWS cloud nodes. The possible cloud node node-installer image types provided by Bright Cluster Manager are:

- a free node-installer image type, used to power on all nodes within the license limit.
- a paid node-installer image type, used to power on all nodes beyond the license limit. Using this as the node-installer image incurs additional hourly costs for the licensing part as well as for the AWS infrastructure.

Default Policy For Node-installer Image Type For AWS Cloud Nodes

A default policy to set the cloud node node-installer image type can be defined at cloud provider level using `usepaidmarketplaceamis`.

Example

```
[root@bright91 ~]# cmsh
[bright91]# cloud
[bright91->cloud[amazon]]% show
```

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access key ID</td>
<td>***********</td>
</tr>
<tr>
<td>Account ID</td>
<td>197943594779</td>
</tr>
<tr>
<td>Billing access key ID</td>
<td>&lt; not set &gt;</td>
</tr>
<tr>
<td>Cloud job tagging</td>
<td>no</td>
</tr>
<tr>
<td>Default AMI</td>
<td>latest:brightinstaller-42</td>
</tr>
<tr>
<td>Default director type</td>
<td>m3.medium</td>
</tr>
<tr>
<td>Default region</td>
<td>eu-west-1</td>
</tr>
<tr>
<td>Default type</td>
<td>m3.medium</td>
</tr>
<tr>
<td>Name</td>
<td>amazon</td>
</tr>
<tr>
<td>Revision</td>
<td></td>
</tr>
<tr>
<td>Secret access key</td>
<td>***********</td>
</tr>
<tr>
<td>Secret billing access key</td>
<td>&lt; not set &gt;</td>
</tr>
<tr>
<td>Tags</td>
<td>COD_PREFIX=PJ,BCM Bursting=extension,Name=bright91</td>
</tr>
<tr>
<td>Type</td>
<td>ec2</td>
</tr>
<tr>
<td>Username</td>
<td>krusty-clusters</td>
</tr>
<tr>
<td>VPCs</td>
<td>&lt;1 in submode&gt;</td>
</tr>
</tbody>
</table>

```
[bright91->cloud[amazon]]% set usepaidmarketplaceamis <TAB><TAB>
always as_needed never
[bright91->cloud[amazon]]% set usepaidmarketplaceamis as_needed
[bright91->cloud[amazon]]% commit
```

There are 3 possible values for `usepaidmarketplaceamis`:

1. `never`: market place images are never used. Any attempt to power on any extra cloud nodes beyond the license limit fails.
2. `always`: The market place image is always used when powering on cloud nodes.
3. `as_needed`: The free image is used as a default so long as the prepaid node count limit has not been exceeded. Beyond the prepaid node count limit, all additional cloud nodes use the market place image.

It should be noted that once a cloud node is up, and using a market place image, then it continues to run as a paid node, even if the node count goes under the prepaid node count limit after some time. The node running a market place image only stops running as a paid node when it is terminated.

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Indication that the node is a marketplace image: In cmsh, if one of the cloud nodes is using a marketplace image, then it is displayed tagged with the text additional cost, as seen in the following for eu-west-1-cnode002:

Example

```
[bright91->device[eu-west-1-cnode002]->cloudsettings]% ds
eu-west-1-cnode001 ........ [ UP ]
eu-west-1-cnode002 ........ [ PENDING ] (Instance has started), additional cost
eu-west-1-cnode003 ........ [ DOWN ]
eu-west-1-director ........ [ UP ]
node001 ................ [ UP ]
node002 ................ [ UP ]
bright91 ............... [ UP ]
```

In Bright View, following the clickpath Devices, a cloud node running a marketplace image is tagged with a $ sign (figure 6.1):

```
  □ ab-c-10-071-c7u5  ↑  Head node  FA:16:3E:3E:D4:1B  Edit
  □ eu-west-1-cnode001  ↓  Cloud node  00:00:00:00:00:00  Edit
  □ eu-west-1-cnode002 $  □  Cloud node  00:00:00:00:00:00  Edit
  □ eu-west-1-cnode003  ↓  Cloud node  00:00:00:00:00:00  Edit
  □ eu-west-1-cstorage001  ↓  Cloud node  00:00:00:00:00:00  Edit
  □ eu-west-1-cstorage002  ↓  Cloud node  00:00:00:00:00:00  Edit
  □ eu-west-1-director  ↑  Cloud node  00:00:00:00:00:00  Edit
```

Figure 6.1: A cloud node, eu-west-1-cnode002, seen running a marketplace image

First-time Use Of A Marketplace Node-installer Image For AWS Cloud Nodes
Before a marketplace image can be used for the first time, the terms of the offer must be accepted, and subscribed to.

If this is not done, then, if the administrator tries to power on a cloud node using a marketplace image via cmsh, an error message similar to the following appears:

Example

```
[device[eu-west-1-director]]% power on

cloud ................. [ FAILED ] eu-west-1-director
(An error occurred (OptInRequired) when calling the RunInstances operation: In order to use this AWS Marketplace product you need to accept terms and subscribe. To do so please visit https://aws.amazon.com/marketplace/pp?sku=<some string>

The URL that appears in the error message can be visited. At that URL the terms can be accepted and a subscription started. Then the attempt to power on a cloud node can be made once more.

6.4.2 Bursting Past The Prepaid Limit In Azure
Node-installer Image Types For Azure Cloud Nodes
In Azure, as for AWS, the possible cloud node node-installer image types provided by Bright Cluster Manager are:
• a free node-installer image type, used to power on all nodes within the license limit.

• a paid node-installer image type, used to power on all nodes beyond the license limit. Using this as the node-installer image incurs additional hourly costs for the licensing part as well as for the Azure infrastructure.

**Default Policy For Node-installer Image Type For Azure Cloud Nodes**

In Azure a default policy to set the cloud node node-installer image type can be defined at cloud provider level using `usepaidmarketplaceimages`.

**Example**

```
[root@bright91 ~]# cmsh
[bright91]# cmsh
[bright91]\% cloud
[bright91->cloud[azure]]% show
```

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client ID</td>
<td>afe23456-06b9-4241-80a9-17ba71cbb911</td>
</tr>
<tr>
<td>Client secret</td>
<td>******************</td>
</tr>
<tr>
<td>Default Cloud Director VM Size</td>
<td>Standard_D2_v3</td>
</tr>
<tr>
<td>Default Location</td>
<td>germanywestcentral</td>
</tr>
<tr>
<td>Default VM Size</td>
<td>Standard_D2_v3</td>
</tr>
<tr>
<td>Default node-installer image</td>
<td><a href="https://brightimages.blob.core.windows.net/images/">https://brightimages.blob.core.windows.net/images/</a></td>
</tr>
<tr>
<td>Extensions</td>
<td>&lt;1 in submode</td>
</tr>
<tr>
<td>Name</td>
<td>azure</td>
</tr>
<tr>
<td>Revision</td>
<td></td>
</tr>
<tr>
<td>Subscription ID</td>
<td>2b8fad2b-aaf1-425a-bf45-36cfd495107e</td>
</tr>
<tr>
<td>Tags</td>
<td>COD_PREFIX=PJ,BCM Bursting=extension</td>
</tr>
<tr>
<td>Tenant ID</td>
<td>8cb88849-6e18-46d6-b0fa-551a47a31681</td>
</tr>
<tr>
<td>Type</td>
<td>azure</td>
</tr>
<tr>
<td>Use paid Marketplace images</td>
<td>NEVER</td>
</tr>
</tbody>
</table>

```
[bright91->cloud[azure]]% set usepaidmarketplaceimages <TAB><TAB>
always as_needed never
```

```
[bright91->cloud[azure]]% set usepaidmarketplaceimages as_needed

[bright91->cloud*[azure*]]% commit
```

In an Azure cloud, just as for the AWS case for `usepaidmarkplaceamis`, there are 3 possible values for `usepaidmarketplaceimages` at the cloud provider level:

1. **never**: market place images are never used. Any attempt to power on any extra cloud nodes beyond the license limit fails.
2. **always**: The market place image is always used when powering on cloud nodes.
3. **as_needed**: The free image is used as a default so long as the prepaid node count limit has not been exceeded. Beyond the prepaid node count limit, all additional cloud nodes use the market place image.

**Setting A Node-installer Image For Azure Cloud Nodes**

It is possible to set an Azure cloud node, for example `germanywestcentral-cnode001`, to follow a different policy by specifying it in the `cloudsettings` submode within the `device` mode:

**Example**

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```bash
[root@bright91 ~]# cmsh
[bright91]% device
[bright91->device]% use <TAB><TAB>
germanywestcentral-cnode001 germanywestcentral-cnode003 master node002
germanywestcentral-cnode002 germanywestcentral-director node001 bright91
[bright91->device]% use germanywestcentral-cnode001
[bright91->device[germanywestcentral-cnode001]]% cloudsettings
[bright91->device[germanywestcentral-cnode001]->cloudsettings]% get usepaidmarketplaceimages
Never (azure)
[bright91->device[germanywestcentral-cnode001]->cloudsettings]% set usepaidmarketplaceimages <TAB><TAB>
always as needed follow provider never
[bright91->device[germanywestcentral-cnode001]->cloudsettings]% set usepaidmarketplaceimages always
[bright91->device[germanywestcentral-cnode001*]->cloudsettings*]% commit
```

This overrides the policy set at the cloud provider level, until the instance is terminated.

**First-time Use Of A Marketplace Image Provided By Bright For Azure Cloud Nodes**

Before using the Azure marketplace image provided by Bright for the first time, the legal terms of the subscription must be agreed to. This is done via the Azure CLI.

The Azure CLI must therefore be installed.

The agreement process is then carried out by running the following command:

```
$ az vm image terms accept --urn <publisher>:<offer>:<sku>:<version>
```

There are 4 items of information that need to be supplied to the command:

1. **publisher**: brightcomputing
2. **offer**: In order to obtain this item of information, the available offers published by the publisher brightcomputing should be listed first:

   **Example**

   ```
   $ az vm image list-offers --location westus --publisher brightcomputing --output table
   Location  Name
   ---------- ----------------
   westus    bcmni-azure-9-0
   ```

   From the list, the item corresponding to the version of the product in use should be used. Here the version is the one corresponding to Bright Cluster Manager version 9.0, and the offer is bcmni-azure-9-0.

3. **sku**: In a similar way to the previous step, the SKU is listed, and the corresponding version selected:

   **Example**

   ```
   $ az vm image list-skus --location westus --publisher brightcomputing --offer bcmni-azure-9-0 --output table
   Location  Name
   ---------- ----------------
   westus    bcm-ni-azure-9-0
   ```

© Bright Computing, Inc.
Here the SKU is bcm-ni-azure-9-0.

4. **version**: latest

The agreement command in this case would then be:

Example

```bash
$ az vm image accept-terms --urn brightcomputing:bcmni-azure-9-0:bcm-ni-azure-9-0:latest
```

## 6.5 Address Resolution In Cluster Extension Networks

### 6.5.1 Resolution And `globalnet`

The `globalnet` network is introduced in section 3.2.3 of the *Administrator Manual*. It allows an extra level of redirection during node resolution. The reason for the redirection is that it allows the resolution of node names across the entire cluster in a hybrid cluster, regardless of whether the node is a cloud node (cloud director node or regular cloud node) or a non-cloud node (head node, regular node or networked device). A special way of resolving nodes is needed because the Amazon IP addresses are in the 10.0.0.0/8 network space, which conflicts with some of the address spaces used by Bright Cluster Manager.

There are no IP addresses defined by `globalnet` itself. Instead, a node, with its domain defined by the `globalnet` network parameters, has its name resolved by another network to an IP address. The resolution is done by the nameserver on the head node for all nodes.

### 6.5.2 Resolution In And Out Of The Cloud

The networks, their addresses, their types, and their domains can be listed from the `network` mode in cmsh:

```bash
[bright73->network]% list -f name:26,type:12,netmaskbits:8,baseaddress:13,domainname:24
name (key) type netmask baseaddress domainname
-------------------------- ------------ -------- ------------- ------------------------
us-east-1 Tunnel 16 172.21.0.0
externalnet External 24 192.168.100.0 brightcomputing.com
globalnet Global 0 0.0.0.0 cm.cluster
internalnet Internal 16 10.141.0.0 eth.cluster
netmap NetMap 16 172.30.0.0
vpc-eu-central-1-private Cloud (VPC) 17 10.42.128.0 vpc-eu-central-1.cluster
vpc-eu-central-1-public Cloud (VPC) 24 10.42.0.0 vpc-eu-central-1.cluster
```

In a Type 1 network (section 3.3.9 of the *Installation Manual*), the head node is connected to `internalnet`. When a cloud service is configured, the head node is also “connected” to the CMDaemon-managed NetMap “network”. It is useful to think of NetMap as a special network, although it is actually a network mapping from the cloud to `internalnet`. That is, it connects (maps) from the nodes in one or more cloud networks such as the `us-east-1` network provided by Amazon, to IP addresses provided by `netmap`. The mapping is set up when a cloud extension is set up. With this mapping, packets using NetMap go from the cloud, via an OpenVPN connection to the NetMap IP address. Once the packets reach the OpenVPN interface for that address, which is actually on the head node, they are forwarded via Shorewall’s `iptables` rules to their destination nodes on `internalnet`.

With default settings, nodes on the network `internalnet` and nodes in a cloud network such as `us-east-1` are both resolved with the help of the `cm.cluster` domain defined in `globalnet`. For a cluster with default settings and using the cloud network `us-east-1`, the resolution of the IP address of 1. a regular node and 2. a regular cloud node, takes place as follows:

1. `node001`, a regular node in the `internalnet` network, is resolved for `node001.cm.cluster` to
10.141.0.1, when at the head node. The cluster manager assigns this address, which is on internalnet. It could also be an ibnet address instead, such as 10.149.0.1, if InfiniBand has been configured for the nodes instead of Ethernet.

172.30.0.1 when at the cloud director or regular cloud node. The cluster manager assigns this address, which is a NetMap address. It helps route from the cloud to a regular node. It is not actually an IP address on the interface of the regular node, but it is convenient to think of it as being the IP address of the regular node.

An explanation of the networks mentioned in the preceding list follows:

- The nodes within all available cloud networks (all networks such as for example, us-east-1, us-west-1, and so on) are given CMDaemon-assigned addresses in the cloud node space range 172.16.0.0–172.29.255.255. In CIDR notation that is: 172.16.0.0/12 (172.16.0.0–172.31.255.255), except for 172.31.0.0/15 (172.30.0.0–172.31.255.255).

- The network address space 172.30.0.0/16 (172.30.0.0–172.30.255.255) is taken by the CMDaemon-assigned NetMap network, explained shortly.

- Each node in a cloud network is also assigned an address in the network addressing space provided by Amazon VPC networking. The assignment of IP addresses to nodes within the 10.0.0.0/8 range is decided by Amazon via DHCP.

The VPC networks for regular cloud nodes and cloud director nodes are subnets in this range.

- The netmap “network” (figure 6.2) is a helper mapping reserved for use in routing from the cloud (that is, from a cloud director or a cloud node) to a regular node. The mapping uses the 172.30.0.0/16 addressing scheme. Its routing is asymmetrical, that is, a NetMap mapping from a regular node to the cloud does not exist. Packets from a regular node to the cloud do however resolve to the cloud network as indicated by 2(a) in the preceding.
6.6 Internet Connectivity For Cloud Nodes

Cloud compute node types in cloudbursting setups—CX-AWS, CX-Azure, COD-AWS, and COD-Azure—can all access the internet by default.

This is elaborated upon in table 6.6:
Table 6.6: Cloud compute node access to internet

<table>
<thead>
<tr>
<th>Cloud node type</th>
<th>Internet access by default?</th>
<th>Details</th>
</tr>
</thead>
</table>
| CX-AWS          | Yes                         | Cloud compute nodes are routed via an sNAT gateway cloud director node. They therefore do not normally require assignment of Elastic IPs (section 6.8.1). If assigning an Elastic IP to a node is required, then such a cloud node should be created on the ‘public’ VPC subnet (by default cloud compute nodes are created on the ‘private’ VPC subnet). To allocate a public IP to a node, the cloud setting allocatepublicip is set to yes before creating the node. By default, cloud directors are configured to be allocated public IP addresses:  

**Example**

[bright91->device[us-east-1-director]->cloudsettings]% get allocatepublicip  
yes |
| CX-Azure        | Yes                         | Cloud compute nodes use the built-in NAT capabilities of Azure’s gateway when accessing the internet. Disabling the security setting causes the security groups to be no longer applied in the cloud director. This means anyone with Layer-3 (IP) access to the cloud director could try to establish a connection to any of the cloud director’s ports. Therefore, by default for CX-OS, the port security plugin is left disabled, and the port security setting left enabled. |
| COD-AWS         | Yes                         | Cloud compute nodes use the head node as an sNAT gateway. If the head node is overloaded with network traffic, then an AWS NAT gateway can be added to the VPC, and configure that device to be the default gateway for a private subnet by modifying the routing table of that subnet. |
| COD-Azure       | Yes                         | Cloud compute nodes can access the internet via TCP/UDP using the Azure Load Balancer. ICMP packets are silently discarded. ICMP traffic can only be allowed by associating a public IP address to the compute node. Microsoft advises its users to use an alternative to ping for connectivity testing that works using TCP packets, and tries to connect to a specific port. |
| COD-OS          | Yes                         | Cloud compute nodes are routed via an sNAT gateway head node. |

6.7 Passing Kernel Parameters To Cloud Nodes

If a cluster administrator configures a non-cloud cluster, then kernel parameters can be set for a particular software image used by the regular nodes. For example, in cmsh, if a software image <image name> is used, then kernel parameters such as root=/dev/sda2 rootdelay=10 pti=auto can be set via the navigation path:
cmsh→softwareimage→use <image name>→set kernelparams "root=/dev/sda2 rootdelay=10 pti=auto"

However, kernel parameters are not passed to cloud nodes via this mechanism at the time of writing (November 2019). If there is a need to pass kernel parameters to cloud nodes, then Bright Computing support should be contacted.

6.8 Setting Up And Creating A Custom VPC

From Bright Cluster Manager version 7.3 onwards, the Amazon EC2-classic platform is no longer available, and all nodes run via Bright Cluster Manager within Amazon always run within an EC2-VPC platform.

Custom VPC for Bright Cluster Manager 9.1 subnet allocation, and allocation of EIPs (External IPs, public IP addresses) is described in sections 6.8.1–6.8.3.

6.8.1 Elastic IP Addresses And Their Use In Configuring Static IP Addresses

Amazon elastic IP addresses (EIPs) can be used to assign a public IP address to a custom VPC.

EIP addresses are the public IP addresses that Amazon provides for the AWS account. These addresses can be associated with custom VPC instances. The public addresses in the set of addresses can then be used to expose the custom VPC instance. In this manual and in Bright Cluster Manager, EIPs are referred to as “public IPs” in the cloud context. When allocating a public IP address, the exact IP address that is allocated is a random IP address from the pool of all public IP addresses made available in the specified region by the configured cloud provider.

6.8.2 Subnets In A Custom VPC

The components of a custom VPC include subnets, the nodes that run in them, and static IP addresses. The subnets are logical network segments within the network range of that custom VPC. Subnets can be thought of as interconnected with a central “magic” router, with Bright Cluster Manager managing the routing tables on that router. The routing ensures correct subnet communication. Inside Bright Cluster Manager, subnets are represented as a type of network (section 3.2 of the Administrator Manual), with a value for type set in cmsh to Cloud (VPC), or in Bright View set to CLOUD.

Subnets for a custom VPC must have non-overlapping ranges. If there are multiple custom VPCs being managed by Bright Cluster Manager, then a particular subnet may be assigned to one custom VPC at the most.

Two series of valid network ranges could be:

Example

1. 10.0.0.0-10.0.31.255 (10.0.0.0/19),
   10.0.32.0-10.0.63.255 (10.0.32.0/19),
   10.0.64.0-10.0.95.255 (10.0.64.0/19).
2. 192.168.0.0-192.168.0.255 (192.168.0.0/24),

The sipcalc command (page 69 of the Administrator Manual) is a useful tool for calculating appropriate subnet ranges. At least one subnet must be assigned to a custom VPC before an instance can be created in that cloud. Typically two or more subnets are assigned, as shown in the custom VPC creation example in the following section.
Creating The Custom VPC

After subnets have been configured, a custom VPC can be created by specifying:

- the name
- the default region
- base address
- number of netmask bits

The network of the custom VPC must obviously be a superset of its subnets. Any subnets of the custom VPC must also be specified. Subnets can be added to or removed from an already-created custom VPC, but only if any cloud node instances within them are terminated first.

There are several ways to set up and create the subnets and custom VPC instance in Bright Cluster Manager:

1. by using Advanced settings options in the clusterextension plugin options, in the command line cm-cluster-extension utility (section 4.1),
2. by using the Bright View private cloud creation wizard (section 3.1),
3. by manually creating and configuring the private cloud object using cmsh.

Option 3 is tedious, but does show to the reader some of what the cm-cluster-extension utility and cloud creation wizard do. To create and configure a private cloud as in option 3, the following example sessions show how a private cloud can be built with cmsh. In the sessions, the subnets to be used for the custom VPC are created first, before creating the private cloud:

- **Subnet creation and cloning**: In the following example session, an arbitrary naming scheme is used for subnets, with a pattern of: `<name of custom VPC>-sn-<number>`. Here, `sn` is an arbitrary abbreviation for “subnet”:

  **Example**

  ```
  [bright91->network]% add vpc-0-sn-0
  [bright91->network*[vpc-0-sn-0*]]% set type cloud
  [bright91->network*[vpc-0-sn-0*]]% set baseaddress 10.0.0.0
  [bright91->network*[vpc-0-sn-0*]]% set netmaskbits 24
  [bright91->network*[vpc-0-sn-0*]]% commit
  ```

  Once the first subnet has been created, it can be cloned:

  **Example**

  ```
  [bright91->network]% clone vpc-0-sn-0 vpc-0-sn-1
  [bright91->network*[vpc-0-sn-1*]]% set baseaddress 10.0.1.0
  [bright91->network*[vpc-0-sn-1*]]% commit
  ```

- **Custom VPC creation**: The following example session in the vpc submode of the cloud mode, creates a private cloud called vpc-0. The private cloud is actually a custom VPC, and belongs to a network that contains the two subnets specified earlier.

  **Example**

  ```
  ```

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6.8 Setting Up And Creating A Custom VPC

[bright91->cloud[Amazon EC2]->vpcs]
[bright91->...->vpcs]% add vpc-0
[bright91->...->vpcs*[vpc-0*]]% set region eu-west-1
[bright91->...*[vpc-0*]]% set baseaddress 10.10.0.0
[bright91->...*[vpc-0*]]% set netmaskbits 16
[bright91->...*[vpc-0*]]% set subnets vpc-0-sn-0 vpc-0-sn-1
[bright91->...*[vpc-0*]]% commit