

Before Starting

Always start here to understand:

Common pre-requisites

Basic Install Toolkit operation

Requirements when an existing cluster exists, both with or without an ESS

1 How does the Install Toolkit work?

IBM Spectrum Scale Install Toolkit operation can be summarized by 4 phases:

- 1) User input via 'spectrum' commands
- 2) A 'spectrum install' phase
- 3) A 'spectrum deploy' phase
- 4) A 'spectrum upgrade' phase

Each phase can be run again at later points in time to introduce new nodes, protocols, authentication, NSDs, file systems, or updates.

All user input via 'spectrum' commands is recorded into a clusterdefinition.txt file in /usr/lpp/mmfs/5.0.2.x/installer/configuration/

Each phase will act upon all nodes inputted into the cluster definition file. For example, if you only want to deploy protocols in a cluster containing a mix of unsupported and supported OSs, input only the supported protocol nodes and leave all other nodes out of the cluster definition.

2 Hardware / Performance Sizing

Please work with your IBM account team or Business Partner for suggestions on the best configuration possible to fit your environment. In addition, make sure to review the [protocol sizing guide](#).

3 OS levels and CPU architecture

The Install Toolkit supports the following OSs:

x86: RHEL7.x, SLES12, Ubuntu 16.04 / 18.04
ppc64 LE: RHEL7.x
ppc64 LE: RHEL7.x, SLES12

All cluster nodes the Install Toolkit acts upon must be of the same CPU architecture and endianness.

All protocol nodes must be of the same OS, architecture, and endianness.

4 Repositories

A base repository must be setup on every node.

RHEL check: `yum repolist`
SLES12 check: `zypper repos`
Ubuntu check: `apt edit-sources`

5 Firewall & Networking & SSH

All nodes must be networked together and pingable via IP, FQDN, and hostname

Reverse DNS lookup must be in place

If /etc/hosts is used for name resolution, ordering within must be: IP FQDN hostname

Promptless ssh must be setup between all nodes and themselves using IP, FQDN, and hostname

Firewalls should be turned off on all nodes else specific ports must be opened both internally for GPFS and the installer and externally for the protocols. See the IBM Knowledge Center for more details before proceeding.

6 Time sync among nodes is required

A consistent time must be established on all nodes of the cluster. NTP can be automatically configured during spectrum scale install. See step 9 of the installation stage.

7 Cleanup prior SMB, NFS, Object

Prior implementations of SMB, NFS, and Object must be completely removed before proceeding with a new protocol deployment. Refer to the cleanup guide within the IBM Knowledge Center.

8 If a GPFS cluster pre-exists

Proceed to the Protocol Deployment section as long as you have:

- a) file system(s) created and mounted ahead of time & nfs4 ACLs in place
- b) ssh promptless access among all nodes
- c) firewall ports open
- d) CCR enabled
- e) `set mmhcoffig release=LATEST`
- f) installed GPFS rpms should match the exact build dates of those included within the protocols package

9 If an ESS is part of the cluster

Proceed to the Cluster Installation section to use the Install Toolkit to install GPFS and add new nodes to the existing ESS cluster. Proceed to the Protocol Deployment section to deploy protocols.

- a) CCR must be enabled
- b) EMS node(s) must be in the ems nodeclass. IO nodes must be in their own nodeclass: gss or gss_ppc64.
- c) GPFS on the ESS nodes must be at minimum 4.2.0.0
- d) All Quorum and Quorum-Manager nodes are recommended to be at the latest levels possible
- e) A CES shared root file system has been created and mounted on the EMS.

10 Protocols in a stretch cluster

Refer to the [stretch cluster use case](#) within the Knowledge Center.

11 Extract Spectrum Scale package

With 5.0.2.0, there is no longer a protocol specific package. Any standard, advanced, or data management package is now sufficient for protocol deployment. Extracting the package will present a license agreement.

```
.Spectrum_Scale_Data_Management-5.0.2.x-<arch>-Linux-install
```

12 Explore the spectrum scale help

From location /usr/lpp/mmfs/5.0.2.x/installer

```
Use the -h flag.  
.SpectrumScale -h  
.SpectrumScale setup -h  
.SpectrumScale node add -h  
.SpectrumScale config -h  
.SpectrumScale config protocols -h
```

13 FAQ and Quick Reference

Refer to the [Knowledge Center Quick Reference](#)
Refer to the [Spectrum Scale FAQ](#)

Cluster Installation

Start here if you would like to:

Create a new cluster from scratch

Add and install new GPFS nodes to an existing cluster (client, NSD, GUI)

Create new NSDs on an existing cluster

1 Setup the node that will start the installation

Pick an IP existing on this node which is accessible to/from all nodes via promptless ssh:

```
./spectrum scale setup -s IP
```

Setup in an ESS environment

If the spectrum scale command is being run on a node(s) in a cluster with an ESS, make sure to switch to ESS mode (see page 2 for ESS examples):

```
./spectrum scale setup -s IP -st ess
```

2 Populate the cluster

If a cluster pre-exists, the Install Toolkit can automatically traverse the existing cluster and populate its clusterdefinition.txt file with current cluster configuration details. Point it at a node within the cluster with promptless ssh access to all other cluster nodes:

```
./spectrum scale config populate -N hostname
```

If in ESS mode, point config populate to the EMS:

```
./spectrum scale config populate -N ems1
```

* Note the limitations of the config populate command

3 Add NSD server nodes (non-ESS nodes)

Adding NSD nodes is necessary if you would like the install toolkit to configure new NSDs and file systems.

```
./spectrum scale node add hostname -n  
./spectrum scale node add hostname -n  
....
```

4 Add NSDs (non-ESS devices)

NSDs can be added as non-shared disks seen by a primary NSD server. NSDs can also be added as shared disks seen by a primary and multiple secondary NSD servers.

In this example we add 4 /dev/dm disks seen by both primary and secondary NSD servers:

```
./spectrum scale nsd add -p primary_nsdnode_hostname  
-s secondary_nsdnode_hostname /dev/dm-1 /dev/dm-2 /  
dev/dm-3 /dev/dm-4
```

5 Define file systems (non-ESS FSs)

File systems are defined by assigning a file system name to one or more NSDs. Filesystems will be defined but not created until this install is followed by a deploy.

In this example we assign all 4 NSDs to the fs1 file system:

```
./spectrum scale nsd list  
./spectrum scale filesystem list  
./spectrum scale nsd modify nsd1 -fs fs1  
./spectrum scale nsd modify nsd2 -fs fs1  
./spectrum scale nsd modify nsd3 -fs fs1  
./spectrum scale nsd modify nsd4 -fs fs1
```

If desired, multiple file systems can be assigned at this point. See the IBM Knowledge Center for details on "spectrum scale nsd modify". We recommend a separate file system for shared root to be used with protocols.

6 Add GPFS client nodes

```
./spectrum scale node add hostname
```

The installer will assign quorum and manager nodes by default. Refer to the IBM Knowledge Center if a specific configuration is desired.

7 Add Spectrum Scale GUI nodes

```
./spectrum scale node add hostname -g -a  
....
```

The management GUI will automatically start after installation and allow for further cluster configuration and monitoring.

8 Configure performance monitoring

Configure performance monitoring consistently across nodes.

```
./spectrum scale config perfmon -r on
```

9 Configure network time protocol (NTP)

The network time protocol can be automatically configured and started on all nodes provided the NTP package has been pre-installed on all nodes:

```
./spectrum scale config ntp -e on -s ntp_server1,  
ntp_server2, ntp_server3, ...
```

10 Configure Callhome

Starting with 5.0.0.0, callhome is enabled by default within the Install Toolkit. Refer to the callhome settings and configure mandatory options for callhome:

```
./spectrum scale callhome config -h
```

Alternatively, disable callhome:

```
./spectrum scale callhome disable
```

11 Name your cluster

```
./spectrum scale config gpfs -c my_cluster_name
```

12 Review your config

```
./spectrum scale node list  
./spectrum scale nsd list  
./spectrum scale filesystem list  
./spectrum scale config gpfs --list  
./spectrum scale install --precheck
```

13 Start the installation

```
./spectrum scale install
```

Upon completion you will have an active GPFS cluster with available NSDs, performance monitoring, time sync, callhome, and a GUI. File systems will be fully created and protocols installed in the next stage: deployment.

Install can be re-run in the future to:

- add GUI nodes
- add NSD server nodes
- add GPFS client nodes
- add NSDs
- add additional protocol nodes (run install first to add more nodes)
- enable and configure or update callhome settings

Protocol & File System Deployment

Start here if you already have a cluster and would like to:

Add/Enable protocols on existing cluster nodes

Create a file system on existing NSDs

Configure File or Object Protocol Authentication

1 Setup the node that will start the installation

Setup is necessary unless spectrum scale setup had previously been run on this node for a past GPFS installation or protocol deployment. Pick an IP existing on this node which is accessible to/from all nodes via promptless ssh:

```
./spectrum scale setup -s IP
```

Setup in an ESS environment

If the spectrum scale command is being run on a node(s) in a cluster with an ESS, make sure to switch to ESS mode (see page 2 for ESS examples):

```
./spectrum scale setup -s IP -st ess
```

2 Populate the cluster

Optionally, the Install Toolkit can automatically traverse the existing cluster and populate its clusterdefinition.txt file with current cluster details. Point it at a node within the cluster with promptless ssh access to all other cluster nodes:

```
./spectrum scale config populate -N hostname
```

If in ESS mode, point config populate to the EMS:

```
./spectrum scale config populate -N ems1
```

* Note the limitations of the config populate command

3 Add protocol nodes

```
./spectrum scale node add hostname -p  
./spectrum scale node add hostname -p  
....
```

4 Assign protocol IPs (CES-IPs)

Add a comma separated list of IPs to be used specifically for cluster export services such as NFS, SMB, Object. Reverse DNS lookup must be in place for all IPs. CES-IPs must be unique and different than cluster node IPs.

```
./spectrum scale config protocols -e EXPORT_IP_POOL
```

* All protocol nodes must see the same CES-IP network(s). If CES-Groups are to be used, apply them after the deployment is successful.

5 Verify file system mount points are as expected

```
./spectrum scale filesystem list
```

* Skip this step if you setup file systems / NSDs manually and not through the install toolkit.

6 Configure protocols to point to a shared root file system location

A ces directory will be automatically created at root of the specified file system mount point. This is used for protocol admin/config and needs >=4GB free. Upon completion of protocol deployment, GPFS configuration will point to this as cesSharedRoot. It is recommended that cesSharedRoot be a separate file system.

```
./spectrum scale config protocols -f fs1 -m /ibm/fs1
```

* If you setup file systems / NSDs manually, perform a manual check of <mmnsd> and <mmisfs1> to make sure all NSDs and file systems required by the deploy are active and mounted before continuing.

7 Enable the desired file protocols

```
./spectrum scale enable nfs  
./spectrum scale enable smb
```

8 Enable the Object protocol if desired

```
./spectrum scale enable object
```

Configure an admin user, password, and database password to be used for Object operations:

```
./spectrum scale config object -au admin -ap -dp
```

Configure the Object endpoint using a single hostname with a round robin DNS entry mapping to all CES IPs:

```
./spectrum scale config object -e hostname
```

Specify a file system and fileset name where your Object data will go:

```
./spectrum scale config object -f fs1 -m /ibm/fs1  
./spectrum scale config object -o Object_Fileset
```

* The Object fileset must not pre-exist. If an existing fileset is detected at the same location, deployment will fail so that existing data is preserved.

9 Setup Authentication

Authentication must be setup prior to using any protocols. If you are unsure of the appropriate authentication config you may skip this step and revisit by re-running the deployment at a later time or manually using the mmuserauth commands. Refer to the IBM Knowledge Center for the many supported authentication configurations.

```
Install Toolkit AD example for File and/or Object  
./spectrum scale auth file ad  
./spectrum scale auth object ad
```

10 Configure Callhome

Starting with 5.0.0.0, callhome is enabled by default within the Install Toolkit. Refer to the callhome settings and configure mandatory options for callhome:

```
./spectrum scale callhome config -h
```

Alternatively, disable callhome:

```
./spectrum scale callhome disable
```

11 Review your config

```
./spectrum scale node list  
./spectrum scale deploy --precheck
```

12 Start the deployment

```
./spectrum scale deploy
```

Upon completion you will have protocol nodes with active cluster export services and IPs. File systems will have been created and Authentication will be configured and ready to use. Performance Monitoring tools will also be usable at this time.

Deploy can be re-run in the future to:

- enable additional protocols
- enable authentication for file or Object
- create additional file systems (run install first to add more NSDs)
- add additional protocol nodes (run install first to add more nodes)
- enable and configure or update callhome settings

Configuration

Start here if you already have a cluster with protocols enabled and would like to:

Check cluster state and health, basic logging/debugging

Configure a basic SMB or NFS export or Object

Configure and Enable File Audit Logging

Path to binaries:

Add the following PATH variable to your shell profile to allow convenient access of gpfs 'mm' commands:

```
export PATH=$PATH:/usr/lpp/mmfs/bin
```

Basic GPFS Health

```
mmgetstate -aL  
mmiscluster  
mmiscluster --ces  
mmnetverify
```

CES service and IP check

```
mmces address list  
mmces service list -a  
mmhealth cluster show  
mmhealth node show -N all -v  
mmhealth node show <component> -v  
mmces events list -a
```

Authentication

```
mmuserauth service list  
mmuserauth service check
```

Callhome

```
mmcallhome info list  
mmcallhome group list  
mmcallhome status list
```

File protocols (NFS & SMB)

Verify all file systems to be used with protocols have nfs4 ACLs and locking in effect. Protocols will not work correctly without this setting in place. Check with: `mmisfs all -D -k`

Example NFS export creation:

```
mkdir /ibm/fs1/nfs_export1
```

```
mmnfs export add /ibm/fs1/nfs_export1 -c  
""(Access_Type=RW,Squash=no_root_squash,SecType=sys  
Protocols=3:4)"
```

```
mmnfs export list
```

Example SMB export creation:

```
mkdir /ibm/fs1/smb_export1
```

```
chown "DOMAINUSER" /ibm/fs1/smb_export1
```

```
mmsmb export add smb_export1 /ibm/fs1/smb_export1 --  
option "browseable=yes"
```

```
mmsmb export list
```

Object protocol

Verify the Object protocol by listing users and uploading an object to a container:

```
source $HOME/openssl  
openssl user list  
openssl project list  
swift stat  
date > test_object1.txt  
swift upload test_container test_object1.txt  
swift list test_container
```

Performance Monitoring

```
systemctl status pmsensors  
systemctl status pmcollector  
mmpermon config show  
mmpermon query -h
```

File Audit Logging

File audit logging functionality is available with Advanced and Data Management Editions of Spectrum Scale.

a) Enable and configure using the Install Toolkit as follows:

```
./spectrum scale fileauditlogging enable  
./spectrum scale filesystem modify --fileauditloggingenable gpfs1  
./spectrum scale fileauditlogging list  
./spectrum scale filesystem modify --logfileset <LOGFILESET>  
retention <days> gpfs1
```

b) Install the File Audit Logging rpms on all nodes

```
./spectrum scale install --precheck  
./spectrum scale install
```

c) Deploy the File Audit Logging configuration

```
"gpfs.adv." or gpfs.dm." rpms must be installed on all nodes"
```

```
./spectrum scale deploy --precheck  
./spectrum scale deploy
```

```
d) Check the status  
mmhealth node show FILEAUDITLOG -v  
mmhealth node show MSGQUEUE -v  
mmaudit all list  
mmmsgqueue status  
mmaudit all consumeStatus -N <node list>
```

Logging & Debugging

Installation / deployment:

```
/usr/lpp/mmfs/5.0.2.x/installer/logs
```

Verbose logging for all spectrum scale commands by adding a '-v' immediately after ./spectrum scale:

```
/usr/lpp/mmfs/5.0.2.x/installer/spectrum scale -v <cmd>
```

GPFS default log location:

```
/var/adm/ras/
```

Linux syslog or journal is recommended to be enabled

Data Capture for Support

System-wide data capture:

```
/usr/lpp/mmfs/bin/gpfs.snap
```

Installation/Deploy/Upgrade specific:

```
/usr/lpp/mmfs/5.0.2.x/installer/installer.snap.py
```

Further IBM Spectrum Scale Education

Best Practices, hints, tips, videos, white papers, and up to date news regarding IBM Spectrum Scale can be found on the [IBM Spectrum Scale wiki](#).

Upgrade & Cluster additions

Start here to gain a basic of understanding of:

Upgrade guidance

How to add nodes, NSDs, FSs, protocols, to an existing cluster

Upgrading 4.1.1.x to 5.0.2.x:

A direct path from 4.1.1.x to 5.0.2.x is not possible unless all nodes of the cluster are offline (see offline section below). However, it is possible to upgrade first, from 4.1.1.x to 4.2.x.x, and second, from 4.2.x.x to 5.0.2.x, while the cluster is online.

Upgrading 4.2.x.x or 5.0.x.x to 5.0.2.x

a) Extract the 5.0.2.x Spectrum Scale PTF package

```
./Spectrum_Scale_Data_Management-5.0.2.x-Linux  
./spectrum scale setup -s <IP of installer node>  
./spectrum scale config populate -N <any cluster node>
```

b) Setup and Configure the Install Toolkit

```
./spectrum scale setup -s <IP of installer node>  
./spectrum scale config populate -N <any cluster node>
```

*If config populate is incompatible with your cluster config, you will have to manually add the nodes and config to the Install Toolkit OR copy the last used clusterdefinition.txt file to the new 5.0.2.x Install Toolkit. ** `cp -p /usr/lpp/mmfs/<4.2.x.your_last_level>/installer/configuration/clusterdefinition.txt /usr/lpp/mmfs/5.0.2.x/installer/configuration/`

```
./spectrum scale node list  
./spectrum scale nsd list  
./spectrum scale filesystem list  
./spectrum scale config gpfs  
./spectrum scale config protocols  
./spectrum scale upgrade precheck  
./spectrum scale upgrade run
```

Upgrading 5.0.2.x to future PTFs

Examples

Example of readying Red Hat 7.x nodes for Spectrum scale installation and deployment of protocols

Configure promptless SSH (*promptless ssh is required*)

```
# ssh-keygen
# ssh-copy-id <FQDN of node>
# ssh-copy-id <IP of node>
# ssh-copy-id <non-FQDN hostname of node>
- repeat on all nodes to all nodes, including current node
```

Turn off firewalls (*alternative is to open ports specific to each Spectrum Scale functionality*)

```
# systemctl stop firewalld
# systemctl disable firewalld
- repeat on all nodes
```

How to check if a yum repository is configured correctly

yum repolist -> should return no errors. It must also show an RHEL7.x base repository. Other repository possibilities include a satellite site, a custom yum repository, an RHEL7.x DVD iso, an RHEL7.x physical DVD.

Use the included local-repo tool to spin up a repository for a base OS DVD (this tool works on RHEL, Ubuntu, SLES)

```
# cd /usr/lpp/mmfs/5.0.2.x/tools/repod
# cat readme_local-repo 1 more
# ./local-repo --mount default --iso /root/RHEL7.4.iso
```

What if I don't want to use the Install Toolkit - how do I get a repository for all the Spectrum Scale rpms?

```
# cd /usr/lpp/mmfs/5.0.2.x/tools/repod
# ./local-repo --repo
# yum repolist
```

Pre-install pre-req rpms to make installation and deployment easier

```
# yum install kernel-devel cpp gcc gcc-c++ glibc sssd ybind openldap-clients krb5-workstation
```

Turn off selinux (*or set to permissive mode*)

```
# sestatus
# vi /etc/selinux/config
- change SELINUX=xxxxxx to SELINUX=disabled
- save and reboot
- repeat on all nodes
```

Setup a default path to Spectrum Scale commands (*not required*)

```
# vi /root/.bash_profile
--add this line--
export PATH=$PATH:/usr/lpp/mmfs/bin
--save/exit--
logout and back in for changes to take effect
```

Example of adding protocol nodes to an ESS

Starting point

- 1) If you have a 5148-22L protocol node, stop following these directions: *please refer to the ESS 5.3.1.1 (or higher) Quick Deployment Guide*
- 2) The cluster containing ESS is active and online
- 3) RHEL7.x, SLES12, or Ubuntu 16.04 is installed on all nodes that are going to serve as protocol nodes
- 4) RHEL7.x, SLES12, or Ubuntu 16.04 base repository is set up on nodes that are going to serve as protocol nodes
- 5) The nodes that will serve as protocol nodes have connectivity to the GPFS cluster network
- 6) Create a cesSharedRoot from the EMS: `gssgendisks --create-vdisk --create-nsds --create-filesystem --contact-node gssio1-hs --crcefs`
- 7) Mount the CES shared root file system on the EMS node and set it to automount. When done with this full procedure, make sure the protocol nodes are set to automount the CES shared root file system as well.
- 8) Use the ESS GUI or CLI to create additional file systems for protocols if desired. Configure each file system for nfsv4 ACLs
- 9) Pick a protocol node to run the Install Toolkit from.
- 10) The Install Toolkit is contained within these packages: Spectrum Scale Protocols Standard or Advanced or Data Management Edition
- 11) Download and extract one of the Spectrum Scale Protocols packages to the protocol node that will run the Install Toolkit
- 12) Once extracted, the Install Toolkit is located in the `/usr/lpp/mmfs/5.0.2.x/installer` directory.
- 13) Inputting the configuration into the Install Toolkit with the commands detailed below, involves pointing the Install Toolkit to the EMS node, telling the Install Toolkit about the mount points and paths to the CES shared root and optionally, the Object file systems, and designating the protocol nodes and protocol config to be installed/deployed.

Install Toolkit commands:

```
./spectrum scale setup -s 10.11.10.11 -st ess <- internal GPFS network IP on the current Installer node that can see all protocol nodes
./spectrum scale config populate -N ems-node <- OPTIONAL. Have the Install Toolkit traverse the existing cluster and auto-populate its config.
./spectrum scale node list <- OPTIONAL. Check the node configuration discovered by config populate.
./spectrum scale node add ems-node -a -e <- designate the EMS node for the Install Toolkit to use for coordination of the install/deploy
./spectrum scale node add cluster-node1 -p
./spectrum scale node add cluster-node2 -p
./spectrum scale node add cluster-node3 -p
./spectrum scale node add cluster-node4 -p
./spectrum scale config protocols -e 172.31.1.10,172.31.1.11,172.31.1.12,172.31.1.13,172.31.1.14
./spectrum scale config protocols -f cesSharedRoot -m /ibm/cesSharedRoot
./spectrum scale enable nfs
./spectrum scale enable smb
./spectrum scale enable object
./spectrum scale config object -e mycluster-ces
./spectrum scale config object -o Object_Fileset
./spectrum scale config object -f ObjectFS -m /ibm/ObjectFS
./spectrum scale config object -au admin -ap -dp
./spectrum scale node list <- It is normal for ESS IO nodes to not be listed in the Install Toolkit. Do not add them.
```

```
./spectrum scale install --precheck
./spectrum scale install <- The install will install GPFS on the new protocol nodes and add them to the existing ESS cluster
```

```
./spectrum scale deploy --precheck <- It's important to make sure CES shared root is mounted on all protocol nodes before continuing
./spectrum scale deploy <- The deploy will install / configure protocols on the new protocol nodes
```

Install Outcome:

- EMS node used as an admin node by the Install Toolkit, to coordinate the installation
- 4 new nodes installed with GPFS and added to the existing ESS cluster
- Performance sensors automatically installed on the 4 new nodes and pointed back to existing collector / GUI on the EMS node
- ESS I/O nodes, NSDs/vdisks, left untouched by the Install Toolkit.

Deploy Outcome:

- CES Protocol stack added to 4 nodes, now designated as Protocol nodes with server licenses
- 4 CES-IPs distributed among the protocol nodes
- Protocol configuration and state data will use the cesSharedRoot file system, which was pre-created on the ESS
- Object protocol will use the ObjectIFS filesystem, which was pre-created on the ESS

Example of Upgrading protocol nodes / other nodes in the same cluster as an ESS

Pre-Upgrade planning:

- Refer to the Knowledge Center for supported upgrade paths of Spectrum Scale nodes
- If you have a 5148-22L protocol node attached to an ESS, please refer to the ESS 5.3.1.1 (or higher) Quick Deployment Guide
- Consider whether OS, FW, or drivers on the protocol node(s) should be upgraded and plan this either before or after the install toolkit upgrade
- SMB: requires quiescing all I/O for the duration of the upgrade. Due to the SMB clustering functionality, differing SMB levels cannot co-exist within a cluster at the same time. This requires a full outage of SMB during the upgrade.
- NFS: Recommended to quiesce all I/O for the duration of the upgrade. NFS experiences I/O pauses, and depending upon the client, mounts may disconnect during the upgrade.
- Object: Recommended to quiesce all I/O for the duration of the upgrade. Object service will be down or interrupted at multiple times during the upgrade process. Clients may experience errors or they might be unable to connect during this time. They should retry as appropriate.
- Performance Monitoring: Collector(s) may experience small durations in which no performance data is logged, as the nodes upgrade.

Install Toolkit commands for Scale 5.0.0.0 or higher

```
./spectrum scale setup -s 10.11.10.11 -st ess <- internal gpfs network IP on the current Installer node that can see all protocol nodes
```

```
./spectrum scale config populate -N ems1 <- Always point config populate to the EMS node when an ESS is in the same cluster
** If config populate is incompatible with your configuration, add the nodes and CES configuration to the install toolkit manually **
```

```
./spectrum scale node list <- This is the list of nodes the Install Toolkit will upgrade. Remove any non-CES nodes you would rather do manually
./spectrum scale upgrade precheck
./spectrum scale upgrade run
```

Example of a new Spectrum Scale cluster installation followed by a protocol deployment

Install Toolkit commands for Installation:

- Toolkit is running from cluster-node1 with an internal cluster network IP of 10.11.10.11, which all nodes can reach

```
cd /usr/lpp/mmfs/5.0.2.x/installer/
./spectrum scale setup -s 10.11.10.11
./spectrum scale node add cluster-node1 -a -g
./spectrum scale node add cluster-node2 -a -g
./spectrum scale node add cluster-node3
./spectrum scale node add cluster-node4
./spectrum scale node add cluster-node5 -n
./spectrum scale node add cluster-node6 -n
./spectrum scale nsd add -p node5.tuc.stglabs.ibm.com -s node6.tuc.stglabs.ibm.com -u dataAndMetadata -fs cesSharedRoot -fg 1 "/dev/sdb"
./spectrum scale nsd add -p node6.tuc.stglabs.ibm.com -s node5.tuc.stglabs.ibm.com -u dataAndMetadata -fs cesSharedRoot -fg 2 "/dev/sdc"
./spectrum scale nsd add -p node5.tuc.stglabs.ibm.com -s node6.tuc.stglabs.ibm.com -u dataAndMetadata -fs ObjectFS -fg 1 "/dev/sdd"
./spectrum scale nsd add -p node5.tuc.stglabs.ibm.com -s node6.tuc.stglabs.ibm.com -u dataAndMetadata -fs ObjectFS -fg 1 "/dev/sde"
./spectrum scale nsd add -p node6.tuc.stglabs.ibm.com -s node5.tuc.stglabs.ibm.com -u dataAndMetadata -fs ObjectFS -fg 2 "/dev/sdf"
./spectrum scale nsd add -p node5.tuc.stglabs.ibm.com -s node6.tuc.stglabs.ibm.com -u dataAndMetadata -fs ObjectFS -fg 2 "/dev/sdg"
./spectrum scale nsd add -p node5.tuc.stglabs.ibm.com -s node6.tuc.stglabs.ibm.com -u dataAndMetadata -fs fs1 -fg 1 "/dev/sdh"
./spectrum scale nsd add -p node5.tuc.stglabs.ibm.com -s node6.tuc.stglabs.ibm.com -u dataAndMetadata -fs fs1 -fg 1 "/dev/sdi"
./spectrum scale nsd add -p node5.tuc.stglabs.ibm.com -s node6.tuc.stglabs.ibm.com -u dataAndMetadata -fs fs1 -fg 2 "/dev/sdj"
./spectrum scale nsd add -p node5.tuc.stglabs.ibm.com -s node6.tuc.stglabs.ibm.com -u dataAndMetadata -fs fs1 -fg 2 "/dev/sdk"
./spectrum scale config perfmon -r on
./spectrum scale config ntp -e on -s ntp_server1,ntp_server2,ntp_server3
./spectrum scale callhome enable <- If you prefer not to enable callhome, change the enable to a disable
./spectrum scale callhome config -n COMPANY_NAME -i COMPANY_ID -cn MY_COUNTRY_CODE -e MY_EMAIL_ADDRESS
./spectrum scale config gpfs -c mycluster
./spectrum scale node list
./spectrum scale install --precheck
./spectrum scale install
```

Install Outcome: A 6node Spectrum Scale cluster with active NSDs

- 2 GUI nodes
- 2 NSD nodes
- 2 client nodes
- 10 NSDs
- configured performance monitoring
- callhome configured
- **3 file systems defined, each with 2 failure groups. File systems will not be created until a deployment**

Install Toolkit commands for Protocol Deployment (*assumes cluster created from above configuration/*

- Toolkit is running from the same node that performed the install above, cluster-node1

```
./spectrum scale node add cluster-node3 -p
./spectrum scale node add cluster-node4 -p
./spectrum scale config protocols -e 172.31.1.10,172.31.1.11,172.31.1.12,172.31.1.13,172.31.1.14
./spectrum scale config protocols -f cesSharedRoot -m /ibm/cesSharedRoot
./spectrum scale enable nfs
./spectrum scale enable smb
./spectrum scale enable object
./spectrum scale config object -e mycluster-ces
./spectrum scale config object -o Object_Fileset
./spectrum scale config object -f ObjectFS -m /ibm/ObjectFS
./spectrum scale config object -au admin -ap -dp
./spectrum scale node list
./spectrum scale deploy --precheck
./spectrum scale deploy
```

Deploy Outcome:

- 2 Protocol nodes
- Active SMB and NFS file protocols
- Active Object protocol
- cesSharedRoot file system created and used for protocol configuration and state data
- ObjectFS file system created with an Object_Fileset created within
- fs1 file system created and ready

Next Steps:

- Configure Authentication with mmuserauth or by configuring authentication with the Install Toolkit and re-running the deployment

Example of adding protocols to an existing cluster

Pre-req Configuration

- Decide on a file system to use for cesSharedRoot (>=4GB). Preferably, a standalone file system solely for this purpose.
- Take note of the file system name and mount point. Verify the file system is mounted on all protocol nodes.
- Decide which nodes will be the Protocol nodes
- Set aside CES-IPs that are unused in the current cluster and network. Do not attempt to assign the CES-IPs to any adapters.
- Verify each Protocol node has a pre-established network route and IP not only on the GPFS cluster network, but on the same network the CES-IPs will belong to. When Protocols are deployed, the CES-IPs will be aliased to the active network device matching their subnet. The CES-IPs must be free to move among nodes during failover cases.
- Decide which protocols to enable. The protocol deployment will install all protocols but will enable only the ones you choose.
- Add the new to-be protocol nodes to the existing cluster using mmaddnode (or use the Install Toolkit).
- In this example, we will add the protocol functionality to nodes already within the cluster.

Install Toolkit commands (Toolkit is running on a node that will become a protocol node)

```
./spectrum scale setup -s 10.11.10.15 <- internal gpfs network IP on the current Installer node that can see all protocol nodes
./spectrum scale config populate -n cluster-node5 <- pick a node in the cluster for the toolkit to use for automatic configuration
./spectrum scale node add cluster-node5 -a -p
./spectrum scale node add cluster-node6 -p
./spectrum scale node add cluster-node7 -p
./spectrum scale node add cluster-node8 -p
./spectrum scale config protocols -e 172.31.1.10,172.31.1.11,172.31.1.12,172.31.1.13,172.31.1.14
./spectrum scale config protocols -f cesSharedRoot -m /ibm/cesSharedRoot
./spectrum scale enable nfs
./spectrum scale enable smb
./spectrum scale enable object
./spectrum scale config object -e mycluster-ces
./spectrum scale config object -o Object_Fileset
./spectrum scale config object -f ObjectFS -m /ibm/ObjectFS
./spectrum scale config object -au admin -ap -dp
./spectrum scale callhome enable <- If you prefer not to enable callhome, change the enable to a disable
./spectrum scale callhome config -n COMPANY_NAME -i COMPANY_ID -cn MY_COUNTRY_CODE -e MY_EMAIL_ADDRESS
./spectrum scale node list
./spectrum scale deploy --precheck
./spectrum scale deploy
```

Deploy Outcome:

- CES Protocol stack added to 4 nodes, now designated as Protocol nodes with server licenses
- 4 CES-IPs distributed among the protocol nodes
- Protocol configuration and state data will use the cesSharedRoot file system
- Object protocol will use the ObjectIFS filesystem
- Callhome will be configured

Example of Upgrading protocol nodes / other nodes (not in an ESS)

Pre-Upgrade planning:

- Refer to the Knowledge Center for supported upgrade paths of Spectrum Scale nodes
- Consider whether OS, FW, or drivers on the protocol node(s) should be upgraded and plan this either before or after the install toolkit upgrade
- SMB: requires quiescing all I/O for the duration of the upgrade. Due to the SMB clustering functionality, differing SMB levels cannot co-exist within a cluster at the same time. This requires a full outage of SMB during the upgrade.
- NFS: Recommended to quiesce all I/O for the duration of the upgrade. NFS experiences I/O pauses, and depending upon the client, mounts may disconnect during the upgrade.
- Object: Recommended to quiesce all I/O for the duration of the upgrade. Object service will be down or interrupted at multiple times during the upgrade process. Clients may experience errors or they might be unable to connect during this time. They should retry as appropriate.
- Performance Monitoring: Collector(s) may experience small durations in which no performance data is logged, as the nodes upgrade.

Install Toolkit commands:

```
./spectrum scale setup -s 10.11.10.11 -st ss <- internal gpfs network IP on the current Installer node that can see all protocol nodes
```

```
./spectrum scale config populate -N <hostname_of_any_node_in_cluster>
```

```
** If config populate is incompatible with your configuration, add the nodes and CES configuration to the install toolkit manually **
```

```
./spectrum scale node list <- This is the list of nodes the Install Toolkit will upgrade. Remove any non-CES nodes you would rather do manually
./spectrum scale upgrade precheck
./spectrum scale upgrade run
```


