

Deploying Xcalar Data Platform in Microsoft Azure Marketplace

Publication date: 2017-12-04

www.xcalar.com

Table of Contents

Overview of deploying Xcalar Data Platform in Azure Marketplace	3
Prerequisites	3
Tasks for deploying and setting up Xcalar Data Platform	3
Deploying Xcalar	4
If you are logged in to the Microsoft Azure portal	4
If you are not logged in to the Microsoft Azure portal	5
Creating the Xcalar instance	6
Providing basic information about the instance	6
Specifying the settings for the Xcalar instance	8
Checking the configuration information	9
Buying	9
Accessing the Xcalar instance	10
Uploading source data files to Azure	11
Preparing for the data upload	11
Uploading data	12
Integrating Xcalar with Azure Active Directory (AD)	14
Connecting Xcalar to Azure AD	14
Logging in to Xcalar Design by using Azure AD	14
Copyright and trademark information	15

Overview of deploying Xcalar Data Platform in Azure Marketplace

This document describes how to deploy and use an instance of Xcalar Data Platform in Microsoft Azure Marketplace.

IMPORTANT: Do not use this document if you use Xcalar Data Platform with a trial license. This document is for users with a full Xcalar Data Platform license.

Prerequisites

Before starting the deployment process, you must meet the following requirements:

- You have an account on the Microsoft Azure portal. You can deploy Xcalar from Azure Marketplace only after you log in to the Azure portal.

For information about creating an Azure account, go to <https://azure.microsoft.com>.

- You have a paid license from Xcalar.

Tasks for deploying and setting up Xcalar Data Platform

Deploying and setting up Xcalar Data Platform require the following steps. Detailed information about each step is provided in the sections that follow.

1. Deploy Xcalar.
2. Access Xcalar.
3. (Optional) Learn about Xcalar by using sample source data files.
4. Make data accessible to Xcalar.
5. (Optional) Connect Xcalar to Azure Active Directory (AD) for other users to log in to Xcalar.

Deploying Xcalar

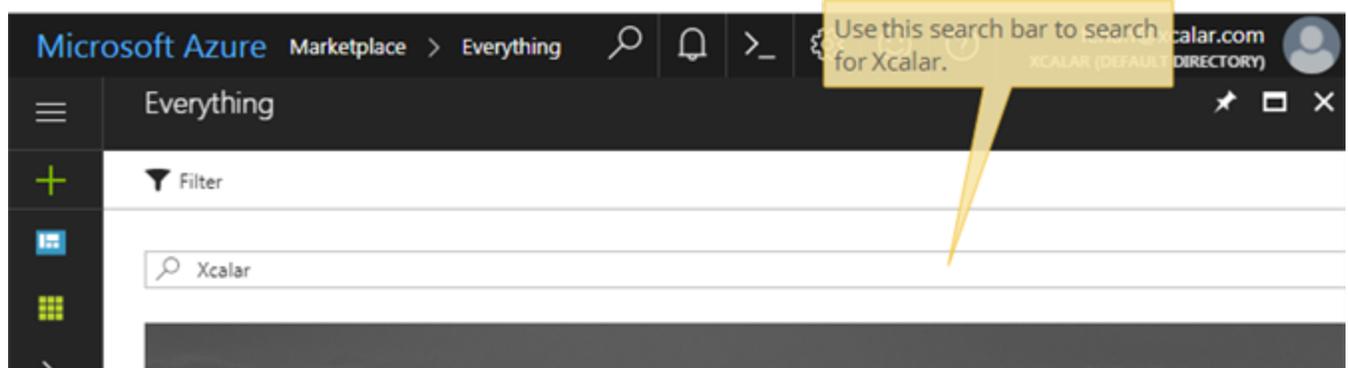
This topic describes how to deploy Xcalar Data Platform in Azure Marketplace. The deployment procedure involves creating the Xcalar instance. The steps leading to the instance creation differ slightly depending on how you access Xcalar Data Platform in Azure Marketplace.

If you are logged in to the Microsoft Azure portal

NOTE: Before you start, copy your Xcalar license key from the Xcalar customer portal (<http://myxcalar.zendesk.com>) to your computer's clipboard. You will need to paste the license key in the following deployment procedure.

If you are logged in to Azure (<https://portal.azure.com>), follow these steps to access Xcalar Data Platform in Azure Marketplace:

1. Navigate to **Marketplace**.
2. Search for **Xcalar** in the search bar. The following partial screenshot shows the location of the search bar.



3. After the search results are displayed, click **Xcalar Data Platform Standard Edition**. A description of Xcalar is displayed.

You are ready to create the Xcalar instance according to [Creating the Xcalar instance](#).

If you are not logged in to the Microsoft Azure portal

NOTE: This section is applicable if you come across the link to Xcalar Data Platform in Microsoft Azure Marketplace during a web search.

Follow these steps to get ready for creating the Xcalar instance:

1. Click the link for Xcalar Data Platform in Microsoft Azure Marketplace on your web search result page. The following partial screenshot shows a search result that contains the link:

Xcalar Data Platform – Microsoft Azure Marketplace

<https://azuremarketplace.microsoft.com/en-us/.../xcalar-inc.xcalar-data-platform?tab...> ▼

Xcalar is an open and extensible analytics platform that delivers actionable insights with simplicity, speed, and scale. Its patented technologies provide a cloud-scale, self-service platform for the complete analytics pipeline, including data preparation, data science, and ad hoc analytics. **Xcalar's** enterprise-grade software ...

2. Read the product description.
3. Click **GET IT NOW**.
4. Log in to the Azure portal. The **Create this App in Azure** modal window is displayed.
5. (Optional) Click the appropriate links to read the terms and privacy statement.
6. Click **Continue**. The product description page is displayed.

You are ready to create the Xcalar instance according to [Creating the Xcalar instance](#).

Creating the Xcalar instance

Creating the Xcalar instance requires four steps, which are described in the following sections.

Providing basic information about the instance

Follow these steps to provide the basic Xcalar instance information:

1. On the product description page, click **Create**.

NOTE: The **Select a deployment model** field does not offer multiple options. Leave the current setting as is.

A list of four steps is displayed.

2. For the step named **Basics**, fill in the form according to the on-screen instructions. The following table provides additional information about the fields:

Field	Description
Name	The desired name for the Xcalar instance or accept the default name.
License Key	The license key that you copied from the customer portal to your computer's clipboard.
Number of nodes	Number provided by Xcalar.

Field	Description
Username	<p>Username for the Xcalar administrator account.</p> <p>IMPORTANT: The username for the Xcalar administrator account must not be <i>root</i>.</p> <p>The following list describes the conventions for user names:</p> <ul style="list-style-type: none"> • The name is case sensitive. • Characters must be A-Z, a-z, 0-9, period (.), hyphen (-), and underscore (_). • The first character must be a letter. • The last character must be a letter or number. • Minimum length is 3 characters.
Password	<p>Use any non-blank characters. Minimum length is one character. You use this password to log in to Xcalar as the Xcalar administrator.</p> <p>IMPORTANT: You cannot change or recover this password either through Microsoft Azure or Xcalar Design. Therefore, record this password immediately after creating it.</p>
Email address	An email address for receiving notifications about the deployment.
Subscription	Select Azure Xcalar Sponsorship if it is not already selected.
Resource group	Either create a new one or select an existing one.

Field	Description
Location	A region appropriate to your geographical area.

IMPORTANT: Record the username and password. After Xcalar is deployed, you need the username and password to log in to Xcalar. The account created with these credentials is the default Xcalar admin account. Also, if for any reason you need to make SSH connections to the virtual machines, you must use the username and password specified in this step.

3. Click **OK**.

Specifying the settings for the Xcalar instance

Follow these steps to specify the Xcalar settings:

1. For the step named **Settings**, determine the size of the instance based on performance and cost.
2. Select the disk type used by the Xcalar instance.
3. Click the **Public IP address** field. The **Create public IP address** is displayed.
4. In the **Name** field, enter the public IP address name.
5. Select **Dynamic** or **Static** for IP address assignment.
6. Click **OK**.
7. In the **Domain name label** field, enter the hostname portion of the fully qualified domain name (FQDN) of the Xcalar instance. The rest of the domain name is displayed below the field.

For example, if your selected location is West Central US, the domain name displayed is westcentralus.cloudapp.azure.com. Suppose you enter myxcalar in the **Domain name label** field, the FQDN of your Xcalar instance is as follows:

myxcalar.westcentralus.cloudapp.azure.com

IMPORTANT: The domain name for the Xcalar instance must be unique across Microsoft Azure.

8. Click **OK** to start the validation process.
9. After validation, the Summary page, which contains the Xcalar instance configuration information, is displayed. Check to make sure that all the information is correct.
10. Click **OK**.

Checking the configuration information

Follow these steps to make sure that the configuration information is accurate:

1. On the **Summary** screen, verify that the information is correct.
2. If all information is accurate, click **OK**. Otherwise, click the **Basics** or **Settings** step to make corrections.

Buying

1. Review the Terms of Use and Privacy Policy published by Xcalar.
2. Click **Purchase**, which starts the deployment process.
3. When the deployment is complete, go to the Xcalar customer portal (<http://myxcalar.zendesk.com>). Under **Azure Deployments**, a new deployment instance is displayed, with the URL for you to access your deployed instance.

Accessing the Xcalar instance

To access the Xcalar instance, follow these steps:

1. From your web browser, go to the URL displayed in the **Azure Deployments** section of your Xcalar customer portal.
2. When the Xcalar Design login page is displayed, log in as the default Xcalar admin user by using the username and password you specified in the deployment procedure. After you are logged in, you can start using Xcalar Design as the Xcalar admin.

Recommendation: To get the most out of Xcalar, complete an exercise named Xcalar Adventure, which comes with source data files accessible by your Xcalar instance. For more information about Xcalar Adventure, go to <https://www.xcalar.com/xu/>.

IMPORTANT: Do not disable through Xcalar Design the default admin user account, which was created during the deployment process. Otherwise, you must contact Xcalar to obtain access to the Xcalar instance with admin privileges again. No other accounts, including the ones in Azure Active Directory, are Xcalar admin user accounts.

Uploading source data files to Azure

For Xcalar Design to analyze your data, you must make your source data files accessible to Xcalar. You can upload data files to an Azure Storage account created during the Xcalar deployment process. The name of the Xcalar-created account is in the following format:

xdpstorage<uniqueString>

NOTE: This topic assumes that you want to upload data currently on your computer to the Azure Storage account created by Xcalar. For importing data from another Azure Storage account, contact Xcalar for help. Also, if you want to upload data from a computer other than the one you are using to connect to the Azure portal, contact Xcalar for help.

Preparing for the data upload

Before you can upload data to Azure, follow these steps:

1. If you do not have Azure Storage Explorer installed on your computer, download Azure Storage Explorer (<https://azure.microsoft.com/en-us/features/storage-explorer/>).
2. Start Azure Storage Explorer. The left pane displays all Microsoft accounts you have signed in to. If you do not see your Azure Storage account, click the following icon to display the **Connect to Azure Storage** dialog box:



3. Select **Add an Azure Account** and **Azure** as the Azure environment.
4. Click **Sign in...**
5. Use your credentials for the Azure portal to sign in.
6. The ACCOUNT MANAGEMENT panel displays the Default Directory for your username,

which contains all your subscriptions. The check box for **Azure Xcalar Sponsorship** is automatically selected.

7. Click **Apply** in the **ACCOUNT MANAGEMENT** panel.
8. When the list of attached storage accounts is displayed, expand the list for **Azure Xcalar Sponsorship**.
9. In the list of Storage Accounts, find the account that Xcalar created for you. You are ready to upload data files to this account.

Uploading data

Follow these steps to upload your source data files to your Azure Storage account:

1. Expand your storage account to display its contents.
2. Expand **Blob Containers** under your storage account.
3. Select the default container named customer and go to step 7. If you want to create a new container, follow steps 4 through 6.

IMPORTANT: You must use **Blob Container** for your source data. Do not select other objects such as **Tables** in your storage account.

4. Right click **Blob Containers** under your storage account to display a menu.
5. Select **Create Blob Container**.
6. Enter a container name, which must be a valid DNS name. Follow these naming rules:
 - The name must start with a letter or number, and can contain only letters, numbers, and the hyphen (-).
 - Every hyphen must be immediately preceded and followed by a letter or number; consecutive hyphens are not permitted.
 - All letters must be lowercase.
 - The name must be from 3 through 63 characters long.

7. Click **Upload** to upload your source data files from your computer to the selected your storage account. You may upload files or folders.
8. Navigate to the file or folder on your computer that you want to upload. Select it and then click **Open**.
9. In the **Upload files** dialog box, select **Block Blob** for **Blob Type**.
10. In the **Upload files** dialog box, click **Upload**. You now have the file or folder in your container.

You are ready to import your data source to Xcalar by using the azblob:// protocol. For more information about importing data, see the Xcalar Design online help.

If you want other users to use Xcalar, connect Xcalar to Azure Active Directory, as described in [Integrating Xcalar with Azure Active Directory \(AD\)](#).

Integrating Xcalar with Azure Active Directory (AD)

In the deployment procedure, you specified a username and a password, which are the credentials for the default admin account stored on Xcalar Data Platform. This account is the only one that can log in to the Xcalar instance.

For other users to log in to the Xcalar instance, you must connect Xcalar to Azure AD. The connection enables the users in Azure AD to log in to the Xcalar instance with user privileges.

Connecting Xcalar to Azure AD

Follow these steps to connect Xcalar to Azure AD:

1. Log in to Xcalar Design.
2. Click the **Setup** icon () in the Monitor.
3. Click **Login Configuration**, which displays the **Login Configuration** modal window.
4. Select **Enable Azure Active Directory Authentication** and follow the on-screen instructions.
5. Click **Confirm & Save**.

Logging in to Xcalar Design by using Azure AD

After Azure AD Authentication has been enabled, the Xcalar Design login page displays a **Login with Azure AD** button.

To log in to Xcalar Design, click the **Login with Azure AD** button. The Azure Portal login page is displayed. Log in to the Azure Portal as usual, and Xcalar Design is ready for you to use.

Copyright and trademark information

© 2017 Xcalar, Inc. All rights reserved. Xcalar is a registered trademark of Xcalar, Inc.

No part of this document covered by copyright may be reproduced in any form or by any means—graphic, electronic, or mechanical, including photocopying, recording, taping, or storage in an electronic retrieval system—without prior written permission of the copyright owner.

The Xcalar logo, Fundamental Discovery, True Data in Place, Xcalar Compute Engine, Xcalar Data Prep, Xcalar Data Science, Xcalar Design, Xcalar Operational Analysis, Xcalar TeraRow, and Xcalar Virtual Data Warehouse are trademarks of Xcalar, Inc.