



# Deploying Cloud Volumes ONTAP

## Cloud Manager 3.5

NetApp

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# Deploying Cloud Volumes ONTAP

## Before you create Cloud Volumes ONTAP systems

Before you use Cloud Manager to create and manage Cloud Volumes ONTAP systems, your Cloud Manager administrator should have prepared networking and installed and set up Cloud Manager.

Your administrator should have followed instructions to get up and running [in AWS](#) or [in Azure](#), and optionally [set up Cloud Manager](#).

The following conditions should exist before you start deploying Cloud Volumes ONTAP:

- AWS and Azure networking requirements were met for Cloud Manager and Cloud Volumes ONTAP.
- Cloud Manager has permissions to perform operations in AWS and Azure on your behalf.
- Each Cloud Volumes ONTAP product that users will deploy was subscribed to from the AWS Marketplace.
- Cloud Manager was installed.
- (Optional) Additional tenants were defined.
- (Optional) Additional user accounts were created, which can include Tenant Admins and Working Environment Admins.

## Logging in to Cloud Manager

You can log in to Cloud Manager from any web browser that has a connection to the Cloud Manager system. You should log in using a [NetApp Cloud Central](#) user account.

### Steps

1. Open a web browser and log in to [NetApp Cloud Central](#).
2. Click **Go to Cloud Data Services** and select **Cloud Volumes ONTAP**.
3. Click **Go to Cloud Manager** for the Cloud Manager system that you want to access.




If you do not see any systems listed, make sure that the Cloud Manager administrator added your NetApp Cloud Central account to the system.


4. Log in to Cloud Manager using your NetApp Cloud Central account.

Log In

Sign Up



Email



Password

Forgot your password?

LOG IN

## Planning your Cloud Volumes ONTAP configuration

When you deploy Cloud Volumes ONTAP, you can choose a preconfigured system that matches your workload requirements, or you can create your own configuration. If you choose your own configuration, you should understand the options available to you.

### Choosing a license type

Cloud Volumes ONTAP is available in AWS and Azure in two pricing options: pay-as-you-go and Bring Your Own License (BYOL). For pay-as-you-go, you can choose from three licenses: Explore, Standard, or Premium. Each license provides different capacity and compute options.

- [Supported configurations for Cloud Volumes ONTAP 9.4](#)
- [Supported configurations for ONTAP Cloud 9.3](#)

### Understanding storage limits

The raw capacity limit for a Cloud Volumes ONTAP system is tied to the license. Additional limits impact the size of aggregates and volumes. You should be aware of these limits as you plan your configuration.

- [Storage limits for Cloud Volumes ONTAP 9.4](#)
- [Storage limits for ONTAP Cloud 9.3](#)

## Choosing an AWS disk type

When you create volumes for Cloud Volumes ONTAP, you need to choose the underlying cloud storage that Cloud Volumes ONTAP uses as a disk. In AWS, you can choose a single EBS disk type or a tiered storage configuration that uses EBS storage as a performance tier and S3 as a capacity tier. You should choose the configuration that meets your requirements for performance and cost.

For an overview of data tiering, see [Storage](#). For requirements, see [Tiering data in AWS](#).

### Supported EBS disk types

At a high level, the differences between EBS disk types are as follows:

- *General Purpose SSD* disks balance cost and performance for a broad range of workloads. Performance is defined in terms of IOPS.
- *Provisioned IOPS SSD* disks are for critical applications that require the highest performance at a higher cost.
- *Throughput Optimized HDD* disks are for frequently accessed workloads that require fast and consistent throughput at a lower price.
- *Cold HDD* disks are meant for backups, or infrequently accessed data, because the performance is very low. Like Throughput Optimized HDD disks, performance is defined in terms of throughput.



Cold HDD disks are not supported with HA configurations.

For additional details about the use cases for these disks, refer to [AWS Documentation: EBS Volume Types](#).

## Choosing an Azure disk type

When you create volumes for Cloud Volumes ONTAP, you need to choose the underlying cloud storage that Cloud Volumes ONTAP uses as a disk. In Azure, you can choose a managed disk or a tiered storage configuration that uses managed disks as a performance tier and Azure Blob storage as a capacity tier. You should choose the configuration that meets your requirements for performance and cost.

For an overview of data tiering, see [Storage](#). For requirements, see [Tiering cold data to low-cost object storage](#).

### Supported Azure managed disks

The underlying managed disk type for Azure can be Premium Storage or Standard Storage:

- *Premium Storage* disks store data on solid state drives (SSDs). The SSD disks provide high

performance for I/O-intensive workloads at a higher cost.

- If you do not need high IOPS, you can reduce your costs by using *Standard Storage* disks which are backed by hard disk drives (HDD).

For additional details about the use cases for these disks, see [Microsoft Azure Documentation: Introduction to Microsoft Azure Storage](#).

## Choosing a disk size

You can choose from several disk sizes when you launch Cloud Volumes ONTAP and when you use the advanced allocation option. You should consider the disk size carefully because it impacts cost, performance, and total volume and system capacity.

When you launch Cloud Volumes ONTAP instances, you must choose the default disk size for aggregates. Cloud Manager uses this disk size for the initial aggregate, and for any additional aggregates that it creates when you use the simple provisioning option. You can create aggregates that use a disk size different from the default by using the advanced allocation option.



In AWS, Cloud Manager gradually increases the size of disks as a system grows. For details, see [Disk size selection for aggregates in AWS](#).

When choosing disk size, you should take several factors into consideration. The disk size impacts how much you pay for storage, the size of volumes that you can create in an aggregate, the total capacity available to Cloud Volumes ONTAP, and storage performance.

Different disk sizes are available for each disk type. Note that all disks in an aggregate must be the same size.

### How disk size relates to performance in AWS

The performance of EBS disks is tied to disk size. The size determines the baseline IOPS and maximum burst duration for SSD disks and the baseline and burst throughput for HDD disks.

Larger disks have a higher baseline and burst performance, so you should always consider performance along with cost. Ultimately, you should choose the disk size that gives you the *sustained performance* that you need.

For example, when using General Purpose SSD disks, you might choose the following disk sizes:

- 100 GB because you want to start out with something small or because you have low performance requirements
- 500 GB because you want to get the best price to performance ratio
- 4 TB because you need very high sustained IOPS performance

Even if you do choose larger disks (for example, six 4 TB disks), you might not get all of the IOPS

because the EC2 instance can reach its bandwidth limit.

For more details about the relationship between disk size and performance, refer to [AWS Documentation: EBS Volume Types](#).

### **How disk size relates to performance in Azure**

The performance of Azure Premium Storage is tied to the disk size. Larger disks provide higher IOPS and throughput. For example, choosing 1 TB disks can provide better performance than 500 GB disks, at a higher cost.

When sizing for performance, you should also be aware of performance limits tied to Azure virtual machine types. For details, refer to the following:

- [Microsoft Azure Documentation: High-performance Premium Storage and managed disks for VMs](#)
- [Microsoft Azure Documentation: Sizes for Linux virtual machines in Azure](#)

There are no performance differences between disk sizes for Standard Storage. You should choose disk size based on the capacity that you need.

### **Choosing a write speed**

Cloud Manager enables you to choose a write speed setting for single node Cloud Volumes ONTAP systems. Before you choose a write speed, you should understand the differences between the normal and high settings and risks and recommendations when using high write speed.

#### **Difference between normal write speed and high write speed**

When you choose normal write speed, data is written directly to disk, thereby reducing the likelihood of data loss in the event of an unplanned system outage.

When you choose high write speed, data is buffered in memory before it is written to disk, which provides faster write performance. Due to this caching, there is the potential for data loss if an unplanned system outage occurs.

The amount of data that can be lost in the event of an unplanned system outage is the span of the last two consistency points. A consistency point is the act of writing buffered data to disk. A consistency point occurs when the write log is full or after 10 seconds (whichever comes first). However, AWS EBS volume performance can affect consistency point processing time.

#### **When to use high write speed**

High write speed is a good choice if fast write performance is required for your workload and you can withstand the risk of data loss in the event of an unplanned system outage.

**Recommendations when using high write speed**

If you enable high write speed, you should ensure write protection at the application layer.

**Choosing a volume usage profile**

ONTAP includes several storage efficiency features that can reduce the total amount of storage that you need. When you create a volume in Cloud Manager, you can choose a profile that enables these features or a profile that disables them. You should learn more about these features to help you decide which profile to use.

NetApp storage efficiency features provide the following benefits:

**Thin provisioning**

Presents more logical storage to hosts or users than you actually have in your physical storage pool. Instead of preallocating storage space, storage space is allocated dynamically to each volume as data is written.

**Deduplication**

Improves efficiency by locating identical blocks of data and replacing them with references to a single shared block. This technique reduces storage capacity requirements by eliminating redundant blocks of data that reside in the same volume.

**Compression**

Reduces the physical capacity required to store data by compressing data within a volume on primary, secondary, and archive storage.

**AWS network information worksheet**

When you launch Cloud Volumes ONTAP in AWS, you need to specify details about your VPC network. You can use a worksheet to collect the information from your administrator.

**Network information for Cloud Volumes ONTAP**

| AWS information                    | Your value |
|------------------------------------|------------|
| Region                             |            |
| VPC                                |            |
| Subnet                             |            |
| Security group (if using your own) |            |

**Network information for an HA pair in multiple AZs**



| <b>AWS information</b>                          | <b>Your value</b> |
|---|-------------------|
| Region  |                   |
| VPC   |                   |
| Security group (if using your own)              |                   |
| Node 1 availability zone                        |                   |
| Node 1 subnet                                   |                   |
| Node 2 availability zone                        |                   |
| Node 2 subnet                                   |                   |
| Mediator availability zone                      |                   |
| Mediator subnet                                 |                   |
| Key pair for the mediator                       |                   |
| Floating IP address for cluster management port |                   |
| Floating IP address for data on node 1          |                   |
| Floating IP address for data on node 2          |                   |
| Route tables for floating IP addresses          |                   |

## Azure network information worksheet

When you deploy Cloud Volumes ONTAP in Azure, you need to specify details about your virtual network. You can use a worksheet to collect the information from your administrator.

| <b>Azure information</b>                   | <b>Your value</b> |
|--|-------------------|
| Region                                     |                   |
| Virtual network (VNet)                     |                   |
| Subnet                                     |                   |
| Network security group (if using your own) |                   |

## Launching Cloud Volumes ONTAP in AWS

You can launch Cloud Volumes ONTAP in a single-system configuration or as an HA

pair in AWS.

## Launching a single Cloud Volumes ONTAP system in AWS

If you want to launch Cloud Volumes ONTAP in AWS, you need to create a new working environment in Cloud Manager.

### *Before you begin*

- You should have prepared by choosing a configuration and by obtaining AWS networking information from your administrator. For details, see [Planning your Cloud Volumes ONTAP configuration](#).
- If you want to launch a BYOL system, you must have the 20-digit serial number (license key) and you must have credentials for a NetApp Support Site account, if the tenant is not already linked with an account.
- If you want to use CIFS, you must have set up DNS and Active Directory. For details, see [Networking requirements for Cloud Volumes ONTAP in AWS](#).

### *About this task*

Immediately after you create the working environment, Cloud Manager launches a test instance in the specified VPC to verify connectivity. If successful, Cloud Manager immediately terminates the instance and then starts deploying the Cloud Volumes ONTAP system. If Cloud Manager cannot verify connectivity, creation of the working environment fails. The test instance is either a t2.nano (for default VPC tenancy) or m3.medium (for dedicated VPC tenancy).

### *Steps*

1. On the Working Environments page, click **Add Working Environment**.
2. Under Create, select **Cloud Volumes ONTAP**.
3. On the Details and Credentials page, optionally change the AWS account, enter a working environment name, add tags if needed, and then enter a password.

Some of the fields in this page are self-explanatory. The following table describes fields for which you might need guidance:

| Field                    | Description  |
|--------------------------|--|
| AWS Account              | If you want to deploy Cloud Volumes ONTAP in other AWS accounts, then you must delegate access across accounts using an IAM role. For instructions, see <a href="#">Adding additional AWS accounts to Cloud Manager</a> .  |
| Working Environment Name | Cloud Manager uses the working environment name to name both the Cloud Volumes ONTAP system and the Amazon EC2 instance. It also uses the name as the prefix for the predefined security group, if you select that option. |

| Field       | Description  |
|-------------|--|
| Add tags    | <p>AWS tags are metadata for your AWS resources. Cloud Manager adds the tags to the Cloud Volumes ONTAP instance and each AWS resource associated with the instance.</p> <p>You can add up to four tags from the user interface when creating a working environment, and then you can add more after its created. Note that the API does not limit you to four tags when creating a working environment.</p> <p>For information about tags, refer to <a href="#">AWS Documentation: Tagging your Amazon EC2 Resources</a>.</p> |
| Credentials | These are the credentials for the Cloud Volumes ONTAP cluster admin account. You can use these credentials to connect to Cloud Volumes ONTAP through OnCommand System Manager or its CLI.  |



If AWS keys were not specified for your Cloud Manager account, you are prompted to enter them after you click Continue. You need to enter them before you can proceed.

- On the Location page, enter the network information that you recorded in the AWS worksheet and then click **Continue**.

The following image shows the Location page filled out:

AWS region

US West | Oregon

VPC

vpc-3a01e05f - 172.31.0.0/16

vpc-3a01e05f - 172.31.0.0/16

7 Subnets | Name : VPC4QA | AWS Default

Subnet

172.31.5.0/24 (OCCM subnet)

Security group

Use a generated security group

SSH authentication method

Password

- On the Data Encryption page, choose no data encryption or AWS-managed encryption.

To better understand these options, see [Data encryption in AWS](#).

For AWS-managed encryption, you can choose a different master key if more than one key is available in your account.

6. On the BYOL License page, specify whether you have a license for this Cloud Volumes ONTAP system.

To understand how licenses work, see [Licensing](#).

7. On the Preconfigured Packages page, select one of the packages to quickly launch Cloud Volumes ONTAP, or click **Create my own configuration**.

If you choose one of the packages, you only need to specify a volume and then review and approve the configuration.

8. On the IAM Role page, you should keep the default option to let Cloud Manager create the role for you.

If you prefer to use your own policy, it must meet [policy requirements for Cloud Volumes ONTAP nodes](#).

9. On the Licensing page, change the Cloud Volumes ONTAP version as needed, select a license, an instance type, the instance tenancy, and then click **Continue**.

If your needs change after you launch the instance, you can modify the license or instance type later.



If a newer Release Candidate, General Availability, or patch release is available for the selected version, then Cloud Manager updates the system to that version when creating the working environment. For example, the update occurs if you select Cloud Volumes ONTAP 9.4 RC1 and 9.4 GA is available. The update does not occur from one release to another—for example, from 9.3 to 9.4.

10. If the NetApp Support Site credentials page is displayed, enter your NetApp Support Site credentials.

Credentials are required for BYOL instances. For details, see [Why you should link a tenant to your NetApp Support Site account](#).

11. On the Underlying Storage Resources page, choose a storage type and a disk size for all disks in the initial aggregate.

You can choose a different disk type for subsequent volumes. For help choosing a disk type, see [Choosing an AWS disk type](#).

For help choosing a disk size, see [Choosing a disk size](#).

12. On the Write Speed & WORM page, choose **Normal** or **High** write speed, and activate write once, read many (WORM) storage, if desired.

[Learn more about write speed.](#)

[Learn more about WORM storage.](#)

13. On the Create Volume page, enter details for the new volume, and then click **Continue**.

You might skip this step if you want to create a volume for iSCSI. Cloud Manager sets up volumes for NFS and CIFS only.

Some of the fields in this page are self-explanatory. The following table describes fields for which you might need guidance:

| Field  | Description  |
|--|--|
| Size   | The maximum size that you can enter largely depends on whether you enable thin provisioning, which enables you to create a volume that is bigger than the physical storage currently available to it.  |
| Access control (for NFS only)                  | An export policy defines the clients in the subnet that can access the volume. By default, Cloud Manager enters a value that provides access to all instances in the subnet.   |
| Permissions and Users / Groups (for CIFS only) | These fields enable you to control the level of access to a share for users and groups (also called access control lists or ACLs). You can specify local or domain Windows users or groups, or UNIX users or groups. If you specify a domain Windows user name, you must include the user's domain using the format domain\username.                                   |
| Snapshot Policy                                | A Snapshot copy policy specifies the frequency and number of automatically created NetApp Snapshot copies. A NetApp Snapshot copy is a point-in-time file system image that has no performance impact and requires minimal storage. You can choose the default policy or none. You might choose none for transient data: for example, tempdb for Microsoft SQL Server. |

The following image shows the Volume page filled out for the CIFS protocol:

#### Details & Protection

Volume Name:  Size (GB):

Snapshot Policy:

Default Policy

#### Protocol

☐ NFS Protocol ☒ CIFS Protocol

Share name:  Permissions:

Users / Groups:

Valid users and groups separated by a semicolon

14. If you chose the CIFS protocol, set up a CIFS server on the CIFS Setup page:

| Field                                     | Description  |
|---|--|
| DNS Primary and Secondary IP Address      | The IP addresses of the DNS servers that provide name resolution for the CIFS server.<br>The listed DNS servers must contain the service location records (SRV) needed to locate the Active Directory LDAP servers and domain controllers for the domain that the CIFS server will join. |
| Active Directory Domain to join           | The FQDN of the Active Directory (AD) domain that you want the CIFS server to join.  |
| Credentials authorized to join the domain | The name and password of a Windows account with sufficient privileges to add computers to the specified Organizational Unit (OU) within the AD domain.   |
| CIFS server NetBIOS name                  | A CIFS server name that is unique in the AD domain.  |
| Organizational Unit                       | The organizational unit within the AD domain to associate with the CIFS server. The default is CN=Computers.   |
| DNS Domain                                | The DNS domain for the Cloud Volumes ONTAP storage virtual machine (SVM). In most cases, the domain is the same as the AD domain.  |

15. On the Usage Profile, Disk Type, and Tiering Policy page, choose whether you want to enable storage efficiency features and edit the S3 tiering policy, if needed.

For more information, see [Understanding volume usage profiles](#) and [Data tiering overview](#).

16. On the Review & Approve page, review and confirm your selections:

- Review details about the configuration.
- Click **More information** to review details about support and the AWS resources that Cloud Manager will purchase.
- Select the **I understand...** check boxes.
- Click **Go**.

#### *Result*

Cloud Manager launches the Cloud Volumes ONTAP instance. You can track the progress in the timeline.

If you experience any issues launching the Cloud Volumes ONTAP instance, review the failure message. You can also select the working environment and click Re-create environment.

For additional help, go to [NetApp Cloud Volumes ONTAP Support](#).

#### *After you finish*

- If you launched a pay-as-you-go instance and the tenant is not linked to a NetApp Support Site account, manually register the instance with NetApp to enable support. For instructions, see [Registering Cloud Volumes ONTAP](#).

Support from NetApp is included with your Cloud Volumes ONTAP system. To activate support, you must first register the instance with NetApp.

- If you provisioned a CIFS share, give users or groups permissions to the files and folders and verify that those users can access the share and create a file.
- If you want to apply quotas to volumes, use System Manager or the CLI.

Quotas enable you to restrict or track the disk space and number of files used by a user, group, or qtree.

- If this is the first Cloud Volumes ONTAP instance launched in AWS, remind your administrator to finish [setting up AWS billing and cost management for Cloud Manager](#) by enabling the WorkingEnvironmentId tag. This tag is not available in AWS until after you create your first Cloud Volumes ONTAP working environment under the AWS payer account.

## Launching a Cloud Volumes ONTAP HA pair in AWS

If you want to launch a Cloud Volumes ONTAP HA pair in AWS, you need to create an HA working environment in Cloud Manager.

### *Before you begin*

- You should have prepared by choosing a configuration and by obtaining AWS networking information from your administrator. For details, see [Planning your Cloud Volumes ONTAP configuration](#).
- If you purchased BYOL licenses, you must have a 20-digit serial number (license key) for each node, and you must have credentials for a NetApp Support Site account if the tenant is not already associated with an account.
- If you want to use CIFS, you must have set up DNS and Active Directory. For details, see [Networking requirements for Cloud Volumes ONTAP in AWS](#).

### *About this task*

Immediately after you create the working environment, Cloud Manager launches a test instance in the specified VPC to verify connectivity. If successful, Cloud Manager immediately terminates the instance and then starts deploying the Cloud Volumes ONTAP system. If Cloud Manager cannot verify connectivity, creation of the working environment fails. The test instance is either a t2.nano (for default VPC tenancy) or m3.medium (for dedicated VPC tenancy).

### *Steps*

1. On the Working Environments page, click **Add Working Environment**.
2. Under Create, select **Cloud Volumes ONTAP HA**.

3. On the Details and Credentials page, optionally change the AWS account, enter a working environment name, add tags if needed, and then enter a password.

Some of the fields in this page are self-explanatory. The following table describes fields for which you might need guidance:

| Field                    | Description   |
|--------------------------|---|
| AWS Account              | If you want to deploy Cloud Volumes ONTAP in other AWS accounts, then you must delegate access across accounts using an IAM role. For instructions, see <a href="#">Adding additional AWS accounts to Cloud Manager</a> .   |
| Working Environment Name | Cloud Manager uses the working environment name to name both the Cloud Volumes ONTAP system and the Amazon EC2 instance. It also uses the name as the prefix for the predefined security group, if you select that option.  |
| Add tags                 | AWS tags are metadata for your AWS resources. Cloud Manager adds the tags to the Cloud Volumes ONTAP instance and each AWS resource associated with the instance. For information about tags, refer to <a href="#">AWS Documentation: Tagging your Amazon EC2 Resources</a> . |
| Credentials              | These are the credentials for the Cloud Volumes ONTAP cluster admin account. You can use these credentials to connect to Cloud Volumes ONTAP through OnCommand System Manager or its CLI.   |



If AWS keys were not specified for your Cloud Manager account, you are prompted to enter them after you click Continue. You must enter the AWS keys before you proceed.

4. On the HA Deployment Models page, choose an HA configuration.

For an overview of the deployment models, see [Cloud Volumes ONTAP HA for AWS](#).

5. On the Location page, enter the network information that you recorded in the AWS worksheet and then click **Continue**.

The following image shows the Location page filled out for a multiple AZ configuration:



|   |  |  |
|---|--|--|
| <p><b>AWS Region</b></p> <div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px 5px;">US West</span>   <span style="padding: 2px 5px;">Oregon</span> </div> | <p><b>VPC</b></p> <div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px 5px;">vpc-3a01e05f</span>   <span style="padding: 2px 5px;">172.31.0.0/16</span> </div> | <p><b>Security group</b></p> <div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px 5px;">Use a generated security group</span> </div> |
|---|--|--|

---

**Node 1:**

---

Availability Zone

us-west-2a

Subnet

172.31.16.0/20

**Node 2:**

---

Availability Zone

us-west-2b

Subnet

172.31.32.0/20

**Mediator:**

---

Availability Zone

us-west-2c

Subnet

172.31.0.0/20

Key Pair

newKey

6. On the Connectivity and SSH Authentication page, choose connection methods for the HA pair and the mediator.

7. If you chose multiple AZs, specify the floating IP addresses and then click **Continue**.

The IP addresses must be outside of the CIDR block for all VPCs in the region. For additional details, see [AWS networking requirements for Cloud Volumes ONTAP HA in multiple AZs](#).

8. If you chose multiple AZs, select the route tables that should include routes to the floating IP addresses and then click **Continue**.

If you have more than one route table, it is very important to select the correct route tables. Otherwise, some clients might not have access to the Cloud Volumes ONTAP HA pair. For more information about route tables, refer to [AWS Documentation: Route Tables](#).

9. On the Data Encryption page, choose no data encryption or AWS-managed encryption.

To better understand these options, see [Data encryption in AWS](#).

For AWS-managed encryption, you can choose a different master key if more than one key is available in your account.

10. On the BYOL License page, specify whether you have a license for this Cloud Volumes ONTAP system.

To understand how licenses work, see [Licensing](#).

11. On the Preconfigured Packages page, select one of the packages to quickly launch a Cloud Volumes ONTAP system, or click **Create my own configuration**.

If you choose one of the packages, you only need to specify a volume and then review and approve the configuration.

12. On the IAM Role page, you should keep the default option to let Cloud Manager create the roles for you.

If you prefer to use your own policy, it must meet [policy requirements for Cloud Volumes ONTAP nodes and the HA mediator](#).

13. On the Licensing page, change the Cloud Volumes ONTAP version as needed, select a license, an instance type, the instance tenancy, and then click **Continue**.

If your needs change after you launch the instances, you can modify the license or instance type later.



If a newer Release Candidate, General Availability, or patch release is available for the selected version, then Cloud Manager updates the system to that version when creating the working environment. For example, the update occurs if you select Cloud Volumes ONTAP 9.4 RC1 and 9.4 GA is available. The update does not occur from one release to another—for example, from 9.3 to 9.4.

14. If the NetApp Support Site credentials page is displayed, enter your NetApp Support Site credentials.

Credentials are required for BYOL instances. For details, see [Why you should link a tenant to your NetApp Support Site account](#).

15. On the Underlying Storage Resources page, choose a storage type and a disk size for all disks in the initial aggregate.

You can choose a different disk type for subsequent volumes. For help choosing a disk type, see [Choosing an AWS disk type](#).

For help choosing a disk size, see [Choosing a disk size](#).

16. On the WORM page, activate write once, read many (WORM) storage, if desired.

[Learn more about WORM storage](#).

17. On the Create Volume page, enter details for the new volume, and then click **Continue**.

You might skip this step if you want to create a volume for iSCSI. Cloud Manager sets up volumes for NFS and CIFS only.

Some of the fields in this page are self-explanatory. The following table describes fields for which you might need guidance:

| Field  | Description  |
|--|--|
| Size   | The maximum size that you can enter largely depends on whether you enable thin provisioning, which enables you to create a volume that is bigger than the physical storage currently available to it.  |
| Access control (for NFS only)                  | An export policy defines the clients in the subnet that can access the volume. By default, Cloud Manager enters a value that provides access to all instances in the subnet.   |
| Permissions and Users / Groups (for CIFS only) | These fields enable you to control the level of access to a share for users and groups (also called access control lists or ACLs). You can specify local or domain Windows users or groups, or UNIX users or groups. If you specify a domain Windows user name, you must include the user's domain using the format domain\username.                                   |
| Snapshot Policy                                | A Snapshot copy policy specifies the frequency and number of automatically created NetApp Snapshot copies. A NetApp Snapshot copy is a point-in-time file system image that has no performance impact and requires minimal storage. You can choose the default policy or none. You might choose none for transient data: for example, tempdb for Microsoft SQL Server. |

The following image shows the Volume page filled out for the CIFS protocol:

### Details & Protection

Volume Name:  Size (GB):

Snapshot Policy:

Default Policy

### Protocol

☐ NFS Protocol ☒ CIFS Protocol

Share name:  Permissions:

Users / Groups:

Valid users and groups separated by a semicolon

- If you selected the CIFS protocol, set up a CIFS server on the CIFS Setup page:

| Field                                | Description   |
|--------------------------------------|---|
| DNS Primary and Secondary IP Address | <p>The IP addresses of the DNS servers that provide name resolution for the CIFS server.</p> <p>The listed DNS servers must contain the service location records (SRV) needed to locate the Active Directory LDAP servers and domain controllers for the domain that the CIFS server will join.</p> |

| Field                                     | Description  |
|---|--|
| Active Directory Domain to join           | The FQDN of the Active Directory (AD) domain that you want the CIFS server to join.  |
| Credentials authorized to join the domain | The name and password of a Windows account with sufficient privileges to add computers to the specified Organizational Unit (OU) within the AD domain. |
| CIFS server NetBIOS name                  | A CIFS server name that is unique in the AD domain.  |
| Organizational Unit                       | The organizational unit within the AD domain to associate with the CIFS server. The default is CN=Computers.   |
| DNS Domain                                | The DNS domain for the Cloud Volumes ONTAP storage virtual machine (SVM). In most cases, the domain is the same as the AD domain.                      |

19. On the Usage Profile, Disk Type, and Tiering Policy page, choose whether you want to enable storage efficiency features and edit the S3 tiering policy, if needed.

For more information, see [Understanding volume usage profiles](#) and [Data tiering overview](#).

20. On the Review & Approve page, review and confirm your selections:
- Review details about the configuration.
  - Click **More information** to review details about support and the AWS resources that Cloud Manager will purchase.
  - Select the **I understand...** check boxes.
  - Click **Go**.

### *Result*

Cloud Manager launches the Cloud Volumes ONTAP HA pair. You can track the progress in the timeline.

If you experience any issues launching the HA pair, review the failure message. You can also select the working environment and click Re-create environment.

For additional help, go to [NetApp Cloud Volumes ONTAP Support](#).

### *After you finish*

- If you launched a pay-as-you-go instance and the tenant is not linked to a NetApp Support Site account, manually register the instance with NetApp to enable support. For instructions, see [Registering Cloud Volumes ONTAP](#).

Support from NetApp is included with your Cloud Volumes ONTAP system. To activate support, you must first register the instance with NetApp.

- If you provisioned a CIFS share, give users or groups permissions to the files and folders and verify

that those users can access the share and create a file.

- If you want to apply quotas to volumes, use System Manager or the CLI.

Quotas enable you to restrict or track the disk space and number of files used by a user, group, or qtree.

- If this is the first Cloud Volumes ONTAP instance launched in AWS, remind your administrator to finish [setting up AWS billing and cost management for Cloud Manager](#) by enabling the WorkingEnvironmentId tag. This tag is not available in AWS until after you create your first Cloud Volumes ONTAP working environment under the AWS payer account.

## Launching Cloud Volumes ONTAP in Azure

You can launch a single Cloud Volumes ONTAP system in Azure by creating a Cloud Volumes ONTAP working environment in Cloud Manager.

### *Before you begin*

- You should have prepared by choosing a configuration and by obtaining Azure networking information from your administrator. For details, see [Planning your Cloud Volumes ONTAP configuration](#).
- If you want to deploy a BYOL system, you must have the 20-digit serial number (license key) and you must have credentials for a NetApp Support Site account, if the tenant is not already linked with an account.

### *About this task*

When Cloud Manager creates a Cloud Volumes ONTAP system in Azure, it creates a resource group that includes the security group, network interfaces, and two storage accounts: one for Azure Standard Storage and one for Premium Storage.

### *Steps*

1. On the Working Environments page, click **Add Working Environment**
2. Under Create, select **Cloud Volumes ONTAP**.
3. On the Details and Credentials page, optionally change the Azure subscription, specify a cluster name and resource group name, add tags if needed, and then specify credentials.

The following table describes fields for which you might need guidance:

| Field                    | Description  |
|--------------------------|--|
| Azure Subscription       | You can choose a different Azure subscription if you provided permissions through multiple subscriptions. If you are using a Managed Service Identity, see <a href="#">Enabling a Managed Service Identity on an existing Cloud Manager virtual machine</a> . If you are using a service principal with credentials, see <a href="#">Assigning the Cloud Manager Operator role to the service principal</a> .  |
| Working Environment Name | Cloud Manager uses the working environment name to name both the Cloud Volumes ONTAP system and the Azure virtual machine. It also uses the name as the prefix for the predefined security group, if you select that option.   |
| Resource Group Name      | If you uncheck <b>Use Default</b> , you can type the name of an existing resource group or a new resource group.   |
| Tags                     | <p>Tags are metadata for your Azure resources. Cloud Manager adds the tags to the Cloud Volumes ONTAP system and each Azure resource associated with the system.</p> <p>You can add up to four tags from the user interface when creating a working environment, and then you can add more after its created. Note that the API does not limit you to four tags when creating a working environment.</p> <p>For information about tags, refer to <a href="#">Microsoft Azure Documentation: Using tags to organize your Azure resources</a>.</p> |
| Credentials              | These are the credentials for the Cloud Volumes ONTAP cluster admin account. You can use these credentials to connect to Cloud Volumes ONTAP through OnCommand System Manager or its CLI.  |



If Azure credentials were not specified for your Cloud Manager account, you are prompted to enter them after you click Continue. You need to enter them before you can proceed.

- On the Location page, enter the network information that you recorded in the worksheet, select the checkbox to confirm network connectivity, and then click **Continue**.
- On the BYOL License page, specify whether you have a license for this Cloud Volumes ONTAP system.

To understand how licenses work, see [Licensing](#).

- On the Preconfigured Packages page, select one of the packages to quickly deploy a Cloud Volumes ONTAP system, or click **Create my own configuration**.

If you choose one of the packages, you only need to specify a volume and then review and approve the configuration.

7. On the Licensing page, change the Cloud Volumes ONTAP version as needed, select a license and a virtual machine type, and then click **Continue**.

If your needs change after you launch the system, you can modify the license or virtual machine type later.



If a newer Release Candidate, General Availability, or patch release is available for the selected version, then Cloud Manager updates the system to that version when creating the working environment. For example, the update occurs if you select Cloud Volumes ONTAP 9.4 RC1 and 9.4 GA is available. The update does not occur from one release to another—for example, from 9.2 to 9.3.

8. On the Azure Marketplace page, follow the steps if Cloud Manager could not enable programmatic deployments of Cloud Volumes ONTAP.
9. If the NetApp Support Site credentials page is displayed, enter your NetApp Support Site credentials.

Credentials are required for BYOL instances. For details, see [Why you should link a tenant to your NetApp Support Site account](#).

10. On the Underlying Storage Resources page, choose either **Premium Storage** (SSD) or **Standard Storage** (HDD) and select a disk size.

The disk type is for the initial volume. You can choose a different disk type for subsequent volumes. For help choosing a disk type, see [Choosing an Azure disk type](#).

The disk size is for all disks in the initial aggregate and for any additional aggregates that Cloud Manager creates when you use the simple provisioning option. You can create aggregates that use a different disk size by using the advanced allocation option.

For help choosing a size, see [Choosing a disk size](#).

11. On the Write Speed & WORM page, choose **Normal** or **High** write speed, and activate write once, read many (WORM) storage, if desired.

[Learn more about write speed.](#)

[Learn more about WORM storage.](#)

12. On the Create Volume page, enter details for the new volume, and then click **Continue**.

You should skip this step if you want to use iSCSI. Cloud Manager enables you to create volumes for NFS and CIFS only.

Some of the fields in this page are self-explanatory. The following table describes fields for which you might need guidance:

| Field  | Description  |
|--|--|
| Size   | The maximum size that you can enter largely depends on whether you enable thin provisioning, which enables you to create a volume that is bigger than the physical storage currently available to it.  |
| Access control (for NFS only)                  | An export policy defines the clients in the subnet that can access the volume. By default, Cloud Manager enters a value that provides access to all instances in the subnet.   |
| Permissions and Users / Groups (for CIFS only) | These fields enable you to control the level of access to a share for users and groups (also called access control lists or ACLs). You can specify local or domain Windows users or groups, or UNIX users or groups. If you specify a domain Windows user name, you must include the user's domain using the format domain\username.                                   |
| Snapshot Policy                                | A Snapshot copy policy specifies the frequency and number of automatically created NetApp Snapshot copies. A NetApp Snapshot copy is a point-in-time file system image that has no performance impact and requires minimal storage. You can choose the default policy or none. You might choose none for transient data: for example, tempdb for Microsoft SQL Server. |

The following image shows the Volume page filled out for the CIFS protocol:

#### Details & Protection

Volume Name:  Size (GB):

Snapshot Policy:

 Default Policy

#### Protocol

☐ NFS Protocol ☒ CIFS Protocol

Share name:  Permissions:

Users / Groups:

Valid users and groups separated by a semicolon

- If you chose the CIFS protocol, set up a CIFS server on the CIFS Setup page:



| Field                                     | Description  |
|---|--|
| DNS Primary and Secondary IP Address      | The IP addresses of the DNS servers that provide name resolution for the CIFS server.<br>The listed DNS servers must contain the service location records (SRV) needed to locate the Active Directory LDAP servers and domain controllers for the domain that the CIFS server will join. |
| Active Directory Domain to join           | The FQDN of the Active Directory (AD) domain that you want the CIFS server to join.  |
| Credentials authorized to join the domain | The name and password of a Windows account with sufficient privileges to add computers to the specified Organizational Unit (OU) within the AD domain.   |
| CIFS server NetBIOS name                  | A CIFS server name that is unique in the AD domain.  |
| Organizational Unit                       | The organizational unit within the AD domain to associate with the CIFS server. The default is CN=Computers.   |
| DNS Domain                                | The DNS domain for the Cloud Volumes ONTAP storage virtual machine (SVM). In most cases, the domain is the same as the AD domain.  |

14. On the Usage Profile, Disk Type, and Tiering Policy page, choose whether you want to enable storage efficiency features and change the tiering policy, if needed.

For more information, see [Understanding volume usage profiles](#) and [Data tiering overview](#).

15. On the Review & Approve page, review and confirm your selections:
  - a. Review details about the configuration.
  - b. Click **More information** to review details about support and the Azure resources that Cloud Manager will purchase.
  - c. Select the **I understand...** check boxes.
  - d. Click **Go**.

### *Result*

Cloud Manager deploys the Cloud Volumes ONTAP system. You can track the progress in the timeline.

If you experience any issues deploying the Cloud Volumes ONTAP system, review the failure message. You can also select the working environment and click Re-create environment.

For additional help, go to [NetApp Cloud Volumes ONTAP Support](#).

### *After you finish*

- If you deployed a pay-as-you-go system and the tenant is not linked to a NetApp Support Site account, manually register the system with NetApp to enable support. For instructions, see

## Registering Cloud Volumes ONTAP.

Support from NetApp is included with your Cloud Volumes ONTAP system. To activate support, you must first register the system with NetApp.

- If you provisioned a CIFS share, give users or groups permissions to the files and folders and verify that those users can access the share and create a file.
- If you want to apply quotas to volumes, use System Manager or the CLI.

Quotas enable you to restrict or track the disk space and number of files used by a user, group, or qtree.

## Registering pay-as-you-go systems

Support from NetApp is included with Cloud Volumes ONTAP Explore, Standard, and Premium systems, but you must first activate support by registering the systems with NetApp, if you have not set up automatic registration.

### *Before you begin*

The host from which you are logged in to Cloud Manager must have internet access. If it does not, you can register from another location by going to [NetApp Cloud Volumes ONTAP Registration](#).

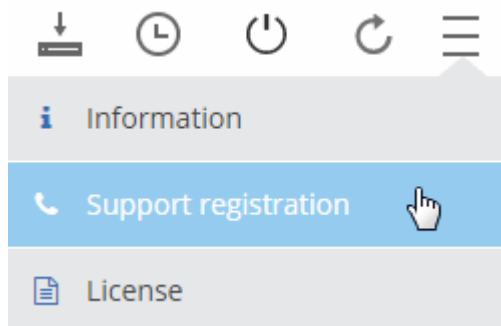
### *About this task*

If a tenant is linked to a NetApp Support Site account, Cloud Manager automatically registers the system with that account. However, if the tenant is not linked to an account, then you should register systems with NetApp after you launch them.

For instructions, see [Linking tenants to a NetApp Support Site account](#).

### *Steps*

1. On the Working Environments page, double-click the name of the system that you want to register.
2. Click the menu icon and then click **Support registration**:



The information that you need to register an instance is displayed:

- Instance ID
  - Serial number
  - Account ID
3. To automatically register future instances in the tenant, click the link to enter your NetApp Support Site credentials.
  4. To register this instance with NetApp support, click the link and then click **Register to NetApp support**.

Following this link automatically completes the instance ID, serial number, and account ID in the registration form.

5. Follow the instructions to register your Cloud Volumes ONTAP system.

## Setting up Cloud Volumes ONTAP

After you deploy Cloud Volumes ONTAP, you can set it up by synchronizing the system time using NTP and by performing a few optional tasks from either System Manager or the CLI.

| Task                                  | Description  |
|---------------------------------------|--|
| Synchronize the system time using NTP | <p>Cloud Volumes ONTAP needs a Network Time Protocol (NTP) server to synchronize the time with clients and peered clusters. Problems can occur when the time is inaccurate.</p> <p>You can configure the NTP server using System Manager or the CLI. For instructions, see the System Manager Help or the <a href="#">ONTAP 9 System Administration Reference</a>.</p>   |
| Optional: Configure AutoSupport       | <p>AutoSupport proactively monitors the health of your system and automatically sends messages to NetApp technical support by default.</p> <p>If the Cloud Manager Admin added a proxy server to Cloud Manager before you launched your instance, Cloud Volumes ONTAP is configured to use that proxy server for AutoSupport messages.</p> <p>You should test AutoSupport to ensure that it can send messages. For instructions, see the System Manager Help or the <a href="#">ONTAP 9 System Administration Reference</a>.</p> |

| Task  | Description  |
|---|--|
| Optional: Configure EMS   | <p>The Event Management System (EMS) collects and displays information about events that occur on Cloud Volumes ONTAP systems. To receive event notifications, you can set event destinations (email addresses, SNMP trap hosts, or syslog servers) and event routes for a particular event severity.</p> <p>You can configure EMS using the CLI. For instructions, see the <a href="#">ONTAP 9 EMS Configuration Express Guide</a>.</p>   |
| Optional: Create an SVM management network interface (LIF) for HA systems | <p>A storage virtual machine (SVM) management network interface (LIF) is required if you want to use SnapCenter or SnapDrive for Windows with an HA pair. The SVM management LIF must use a <i>floating</i> IP address when using an HA pair across multiple AWS Availability Zones.</p> <p>Cloud Manager prompts you to specify the floating IP address when you launch the HA pair. If you did not specify the IP address, you can create the SVM Management LIF yourself from System Manager or the CLI. The following example shows how to create the LIF from the CLI:</p> <pre>network interface create -vserver svm_cloud -lif svm_mgmt -role data -data-protocol none -home-node cloud-01 -home -port e0a -address 10.0.2.126 -netmask 255.255.255.0 -status -admin up -firewall-policy mgmt</pre> |
| Optional: Change the backup location of configuration files               | <p>Cloud Volumes ONTAP automatically creates configuration backup files that contain information about the configurable options that it needs to operate properly.</p> <p>By default, Cloud Volumes ONTAP backs up the files to the Cloud Manager host every eight hours. If you want to send the backups to an alternate location, you can change the location to an FTP or HTTP server in your data center or in AWS. For example, you might already have a backup location for your FAS storage systems.</p> <p>You can change the backup location using the CLI. See the <a href="#">ONTAP 9 System Administration Reference</a>.</p>  |

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