



Preparing to demo IBM Cloud for Financial Services

This document will walk you through the steps of how to access your IBM Cloud for Financial Services demonstration environment. This will include walking you through how to request a demo environment. Logging into IBM Cloud, enabling your VPN client to access to the Management and Workload Clusters. Walk you around the IBM Cloud console to make you more familiar with the features. Finally, it will list a few restrictions and do's and don'ts for the environment.

Goals for the Demo:

- Prepare you environment to demo the IBM Cloud for Financial Services.
- Setup OpenVPN client on your laptop to gain access to the private VPN networks
- Walk you around the IBM Cloud console so you are familiar with the features

Prerequisites:

- Download and install the OpenVPN client
 - Windows <https://openvpn.net/community-downloads/>
 - MacOS <https://openvpn.net/client-connect-vpn-for-mac-os/>
 - Linux <https://openvpn.net/download-open-vpn/>
- Download the techzone.ovpn VPN certificate and add it to the OpenVPN client
 - Link <https://techzone-iam-agent.eqtyaj6hk2k.eu-de.codeengine.appdomain.cloud/vpn/download>

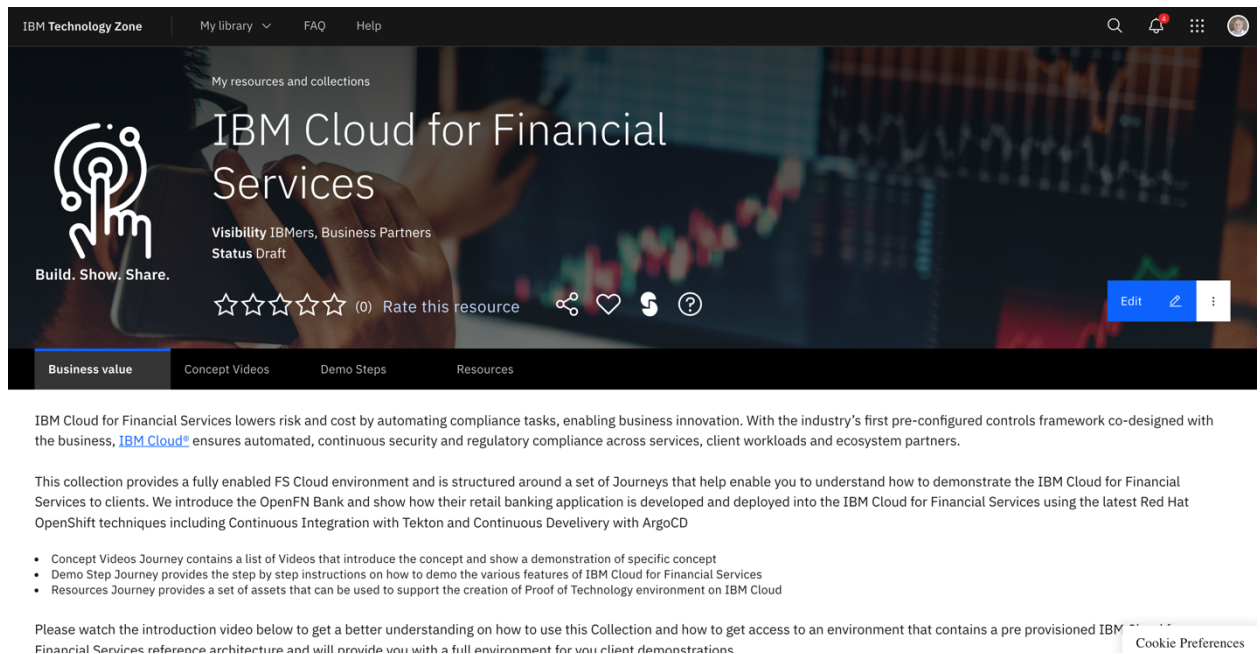


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Request TechZone Environment

Steps:

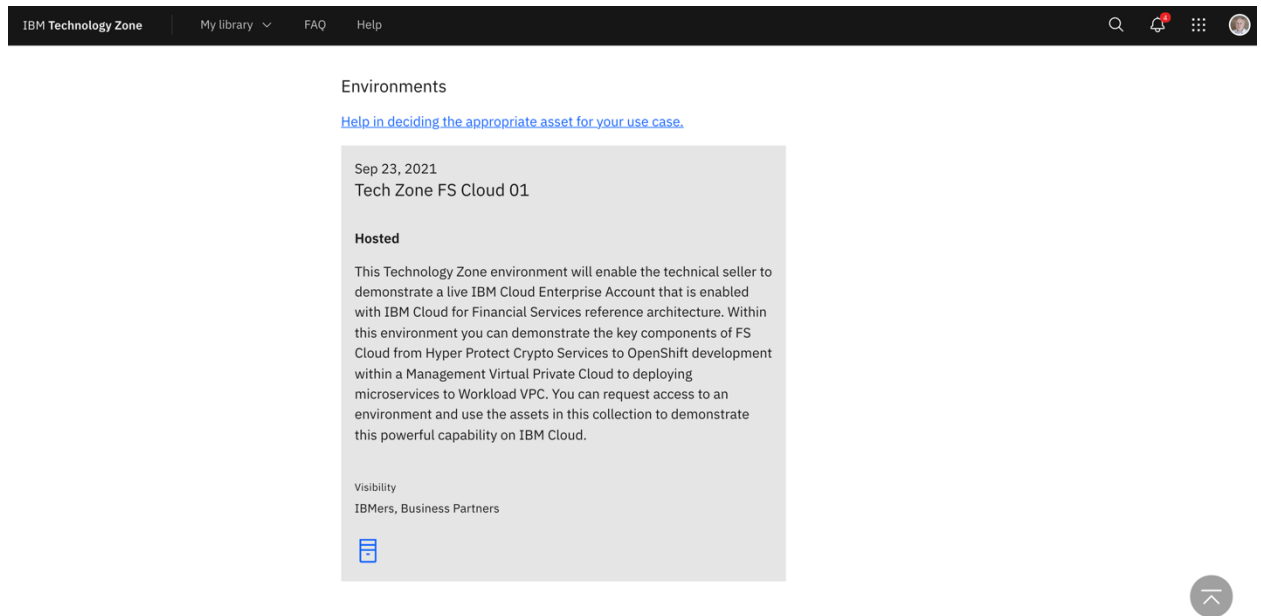
1. If you have not already done so, access the Tech Zone collection for IBM Cloud for Financial Services.
 - a. <https://techzone.ibm.com/collection/ibm-cloud-for-financial-services>



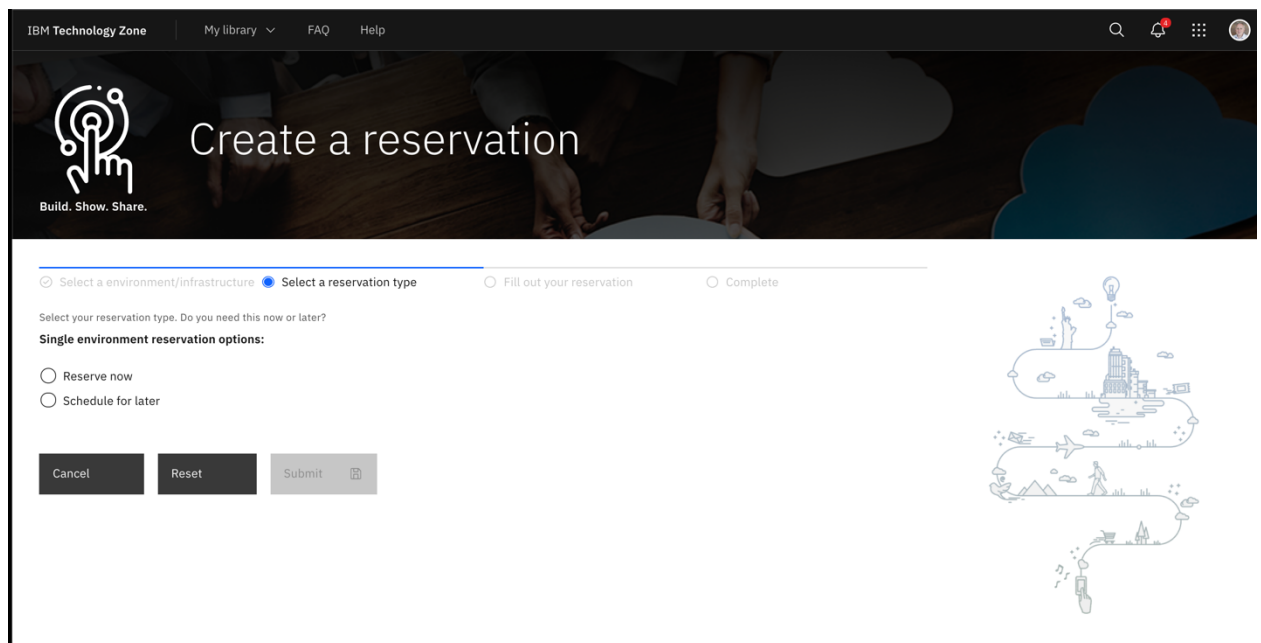
2. The first thing you need to do is request access to the demo environment. Scroll down and click on **Environments**



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3. Click on the **Tech Zone FS Cloud 01** environment

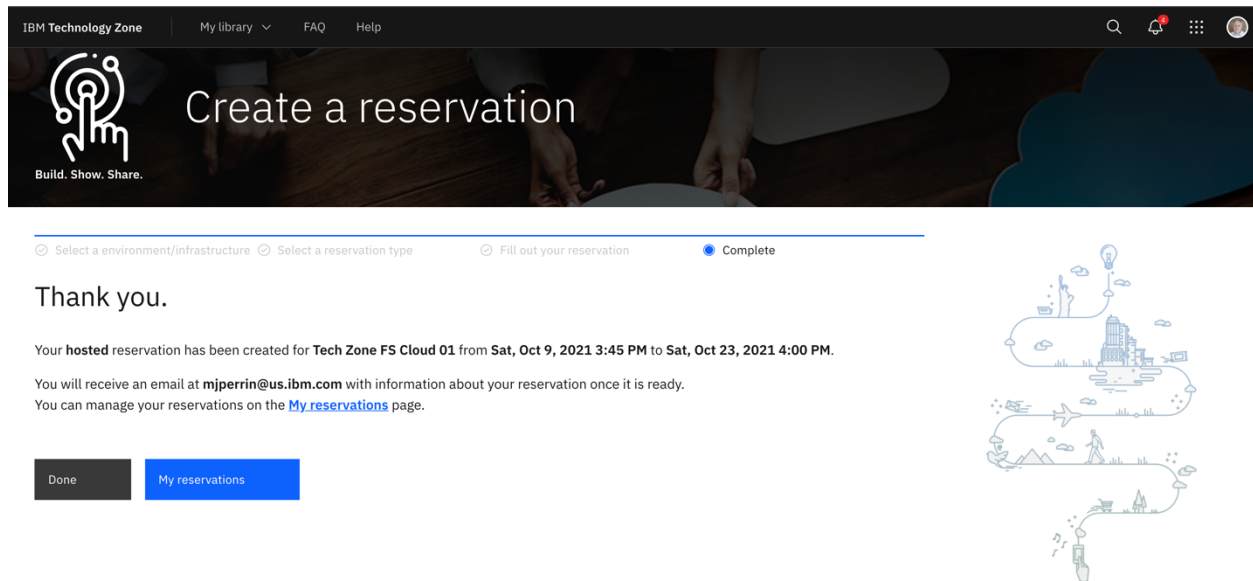


4. Click on the **Reserve now** radio button
5. Complete the Reservation Type form make sure all the fields are complete, you may want to select **Practice / Self-Education** as the Purpose of the demo request
6. Click on **Submit** once all the fields are entered correctly



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- Once the Submit has completed you will see the following screen, this is confirming that you have been added as a user to the **Tech Zone FS Cloud 01** demo account.



- You are dynamically added to a pre-existing demo account. This takes just a few seconds to complete.
- You should wait until you receive the confirmation email before proceeding.

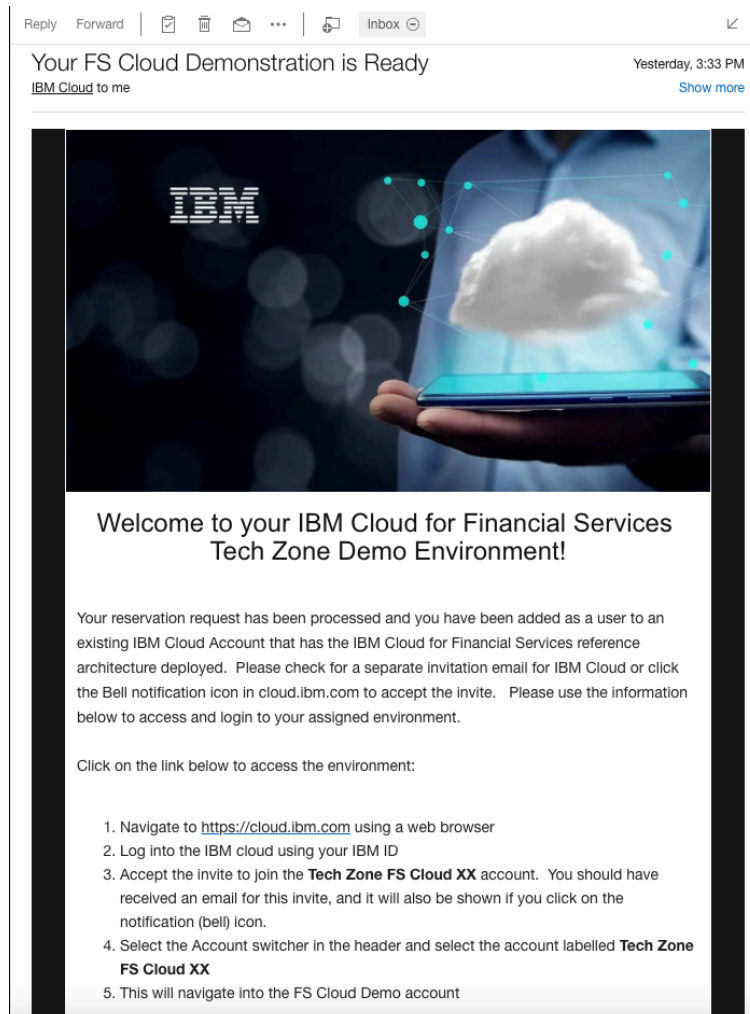


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Receive Confirmation Email setup VPN Client

Steps:

1. Once you have If you have completed the request for a demo environment you will receive a confirmation email.



2. It is important you read the email as it contains instructions of how to log into the Tech Zone Demo Account.
3. The second part of the email details instructions on how to setup the OpenVN Client on your demo workstations. You will need to set this up to access the Virtual Private Cloud networks.



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4. Before you continue you will need to configure you VPN Client to access the Virtual Private Cloud network that is configured in this account. Follow the steps below to complete this setup:
5. Before you continue you will need to configure you VPN Client to access the Virtual Private Cloud network that is configured in this account. Follow the steps below to complete this setup:
6. Download the OpenVPN Client for you operating system from this
 - a. Windows <https://openvpn.net/community-downloads/>
 - b. MacOS <https://openvpn.net/client-connect-vpn-for-mac-os/>
 - c. Linux <https://openvpn.net/download-open-vpn/>
7. Install the OpenVPN client into your desktop operating system
8. Download a Certificate that will allow you to define the VPN connectivity between you desktop and the Management VPC
 - a. Link <https://techzone-iam-agent.eqtyaj6hk2k.eu-de.codeengine.appdomain.cloud/vpn/download>
9. Add the downloaded **techzone.ovpn** certificate to the OpenVPN Client
10. Turn on the profile

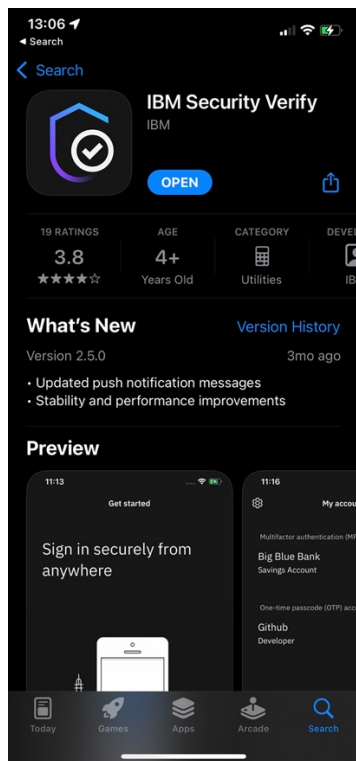


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Log into your IBM Cloud Account

Steps:

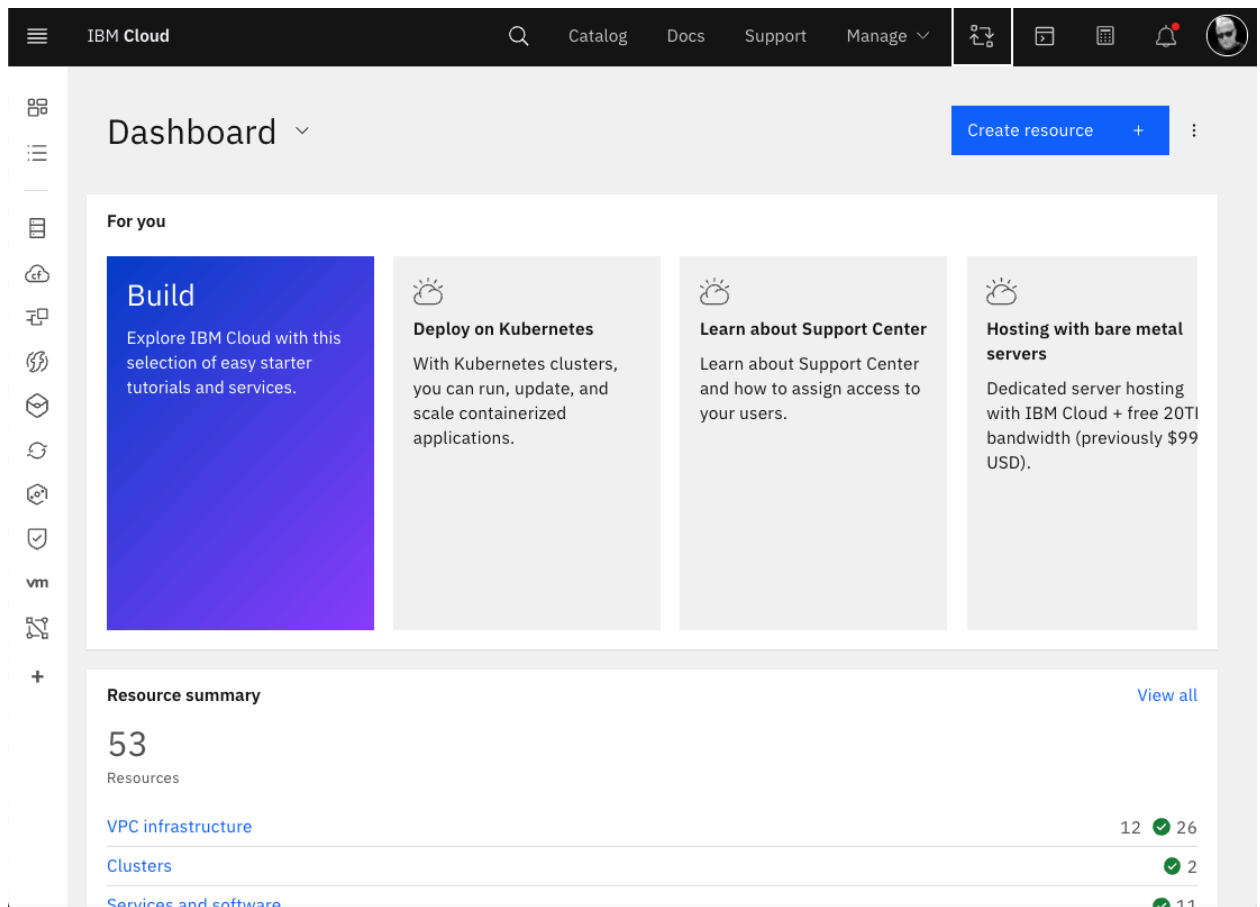
1. Now your VPN client is running it is now time to log into your IBM Cloud demo account.
2. Two factor authentication is enabled as part of being FS Cloud compliant. You will need to install the IBM Verify authentication app onto your mobile phone. Go to you phone providers app store and search for **IBM Verify** and install it onto your mobile device.



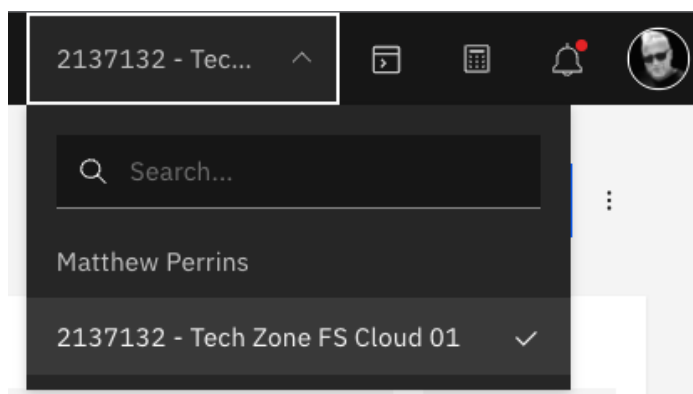
3. Navigate to the IBM Cloud login page <https://cloud.ibm.com>
4. Login with your IBM ID that was used to log into Tech Zone
5. Authenticate with your two-factor authentication code from **IBM Verify**
6. You should now see the IBM Cloud Dashboard



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7. Make sure you have switched from either your free account or any other IBM Cloud accounts you may be a member of. Using the account switcher move to the account called **Tech Zone FS Cloud XX** (there may be more demo environments in the future you may have been added to that account)





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8. You are now inside an IBM Cloud Enterprise account that has been configured for IBM Cloud for Financial Services. The following sections will help you get familiar with the account before you start a client demo.

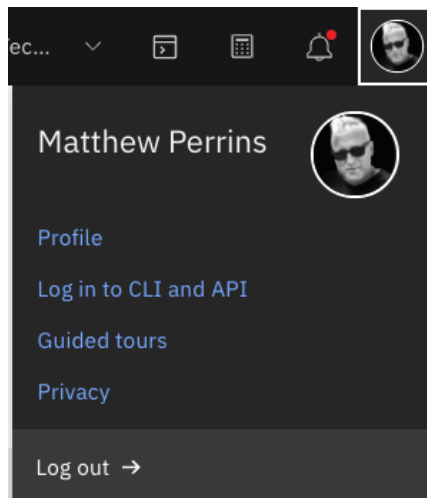


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IBM Cloud Basics this section will help you become familiar with the cloud account and the basic features.

Steps:

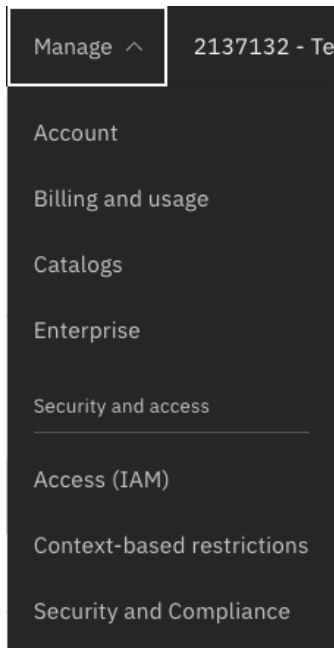
1. The cloud account has been configured to support hundreds if not thousands of users. To make this level of Tech Zone demo scale we have defined all the TechZone users to be part of an Access Group that is read only. This means you can navigate around and demo the components of the FS Cloud, but you will not be able to create or destroy any of the cloud services.
2. The IBM Cloud Header allows you to navigate around the Cloud Accounts. You can click on you profile icon top right. It's recommended to add a picture.



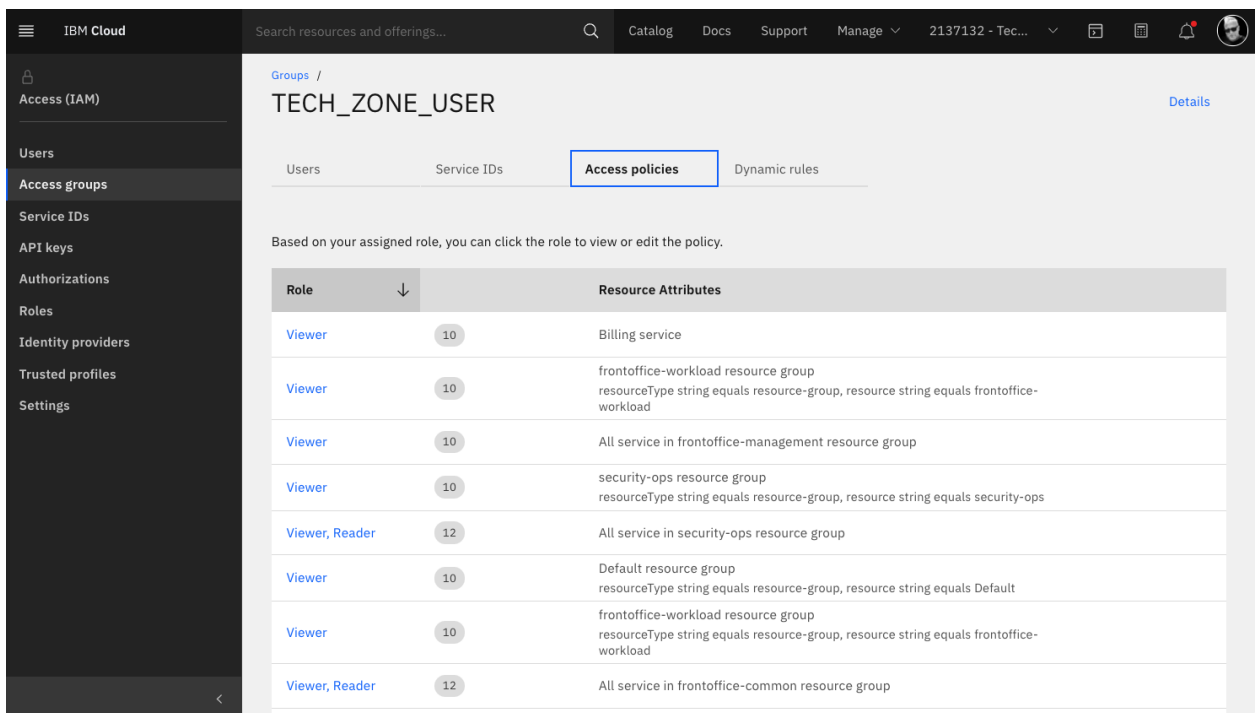
3. You can use the guided tours or logout, you will not be using the Command Line so will not need worry about the CLI features.
4. Click on the **Manage** menu and you can access Account details, Billing and usage and Access



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5. Click on **Access (IAM)** you will see that you are a member of an Access Group called **TECH_ZONE_USER**

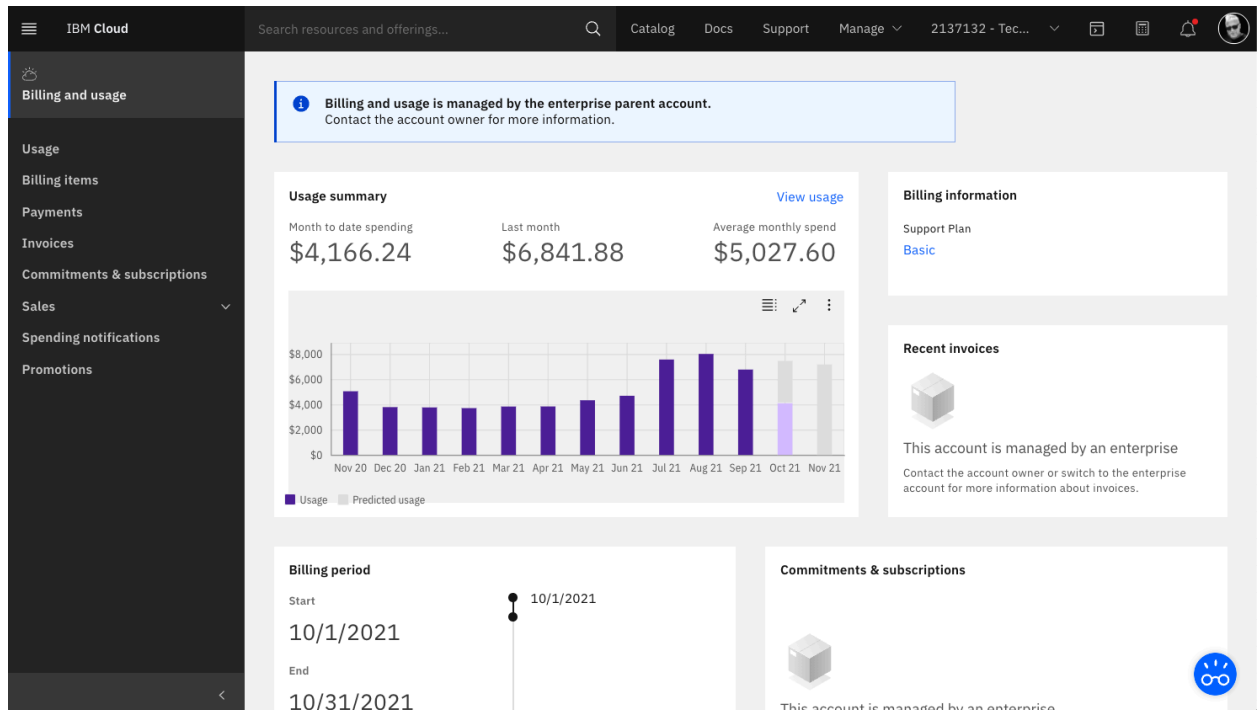


6. The access policies have been defined for Viewer access only. This is to help the account scale for lots of demos and lots of people using it all at the same time.



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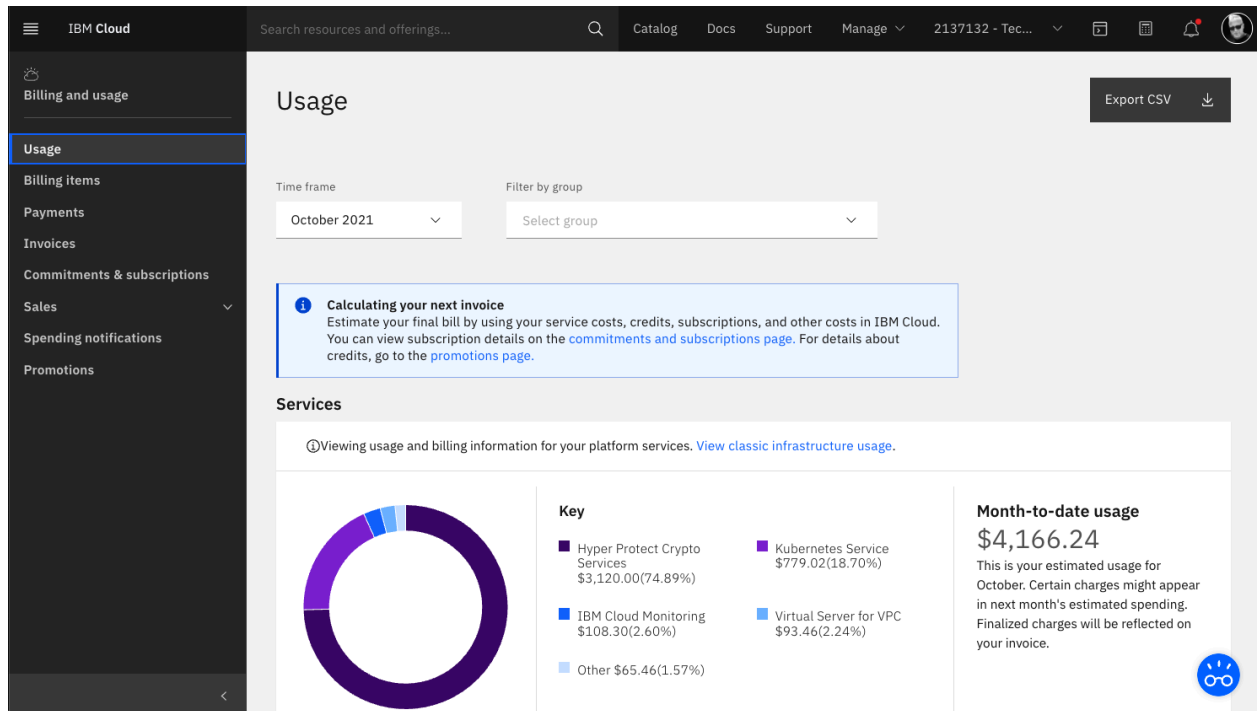
7. We have given you access to **Billing and usage** this is to enable you to demonstrate the cost structure for this account.



8. Click on **Usage** and become familiar with the breakdown of the costs of the FS Cloud reference architecture components.



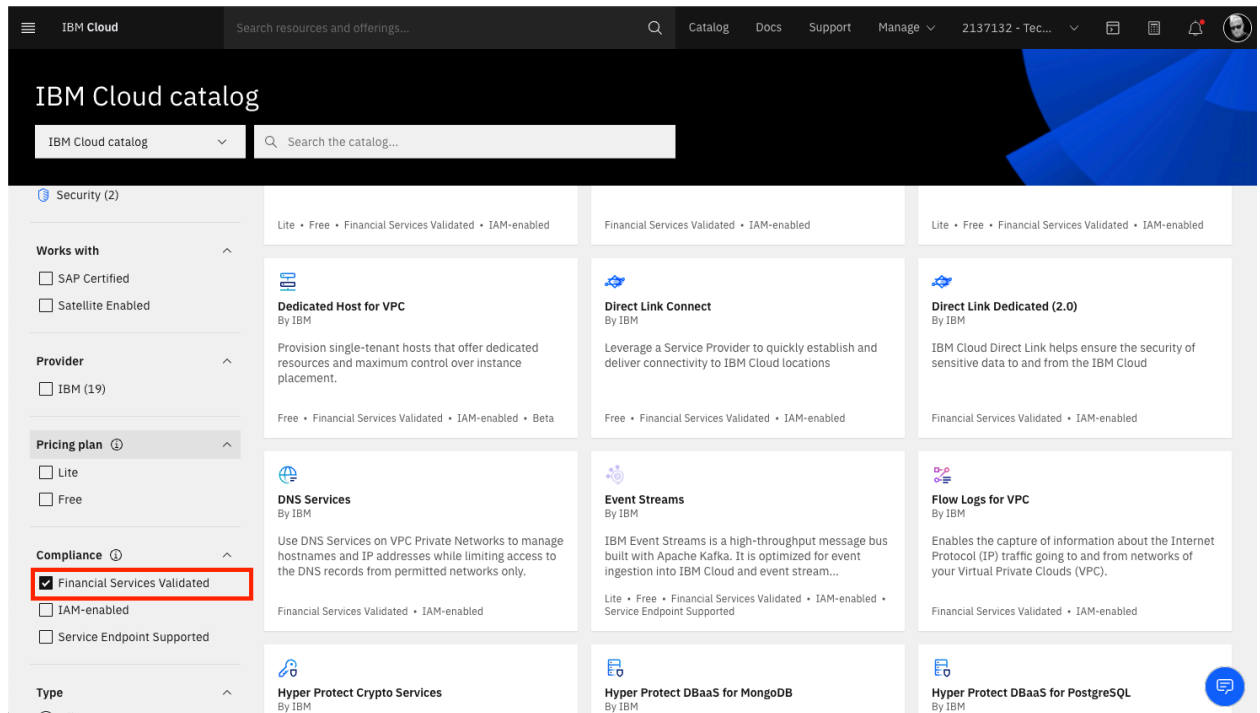
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9. You have full access to the catalog, but you will not be able to provision any of the services. This is to allow you to demo the breadth of the services and understand the costs, but you cannot add any of the services to the account.
10. Using the filter feature narrow the list of services to just show the catalog entries that are validate for IBM Cloud for Financial Services.



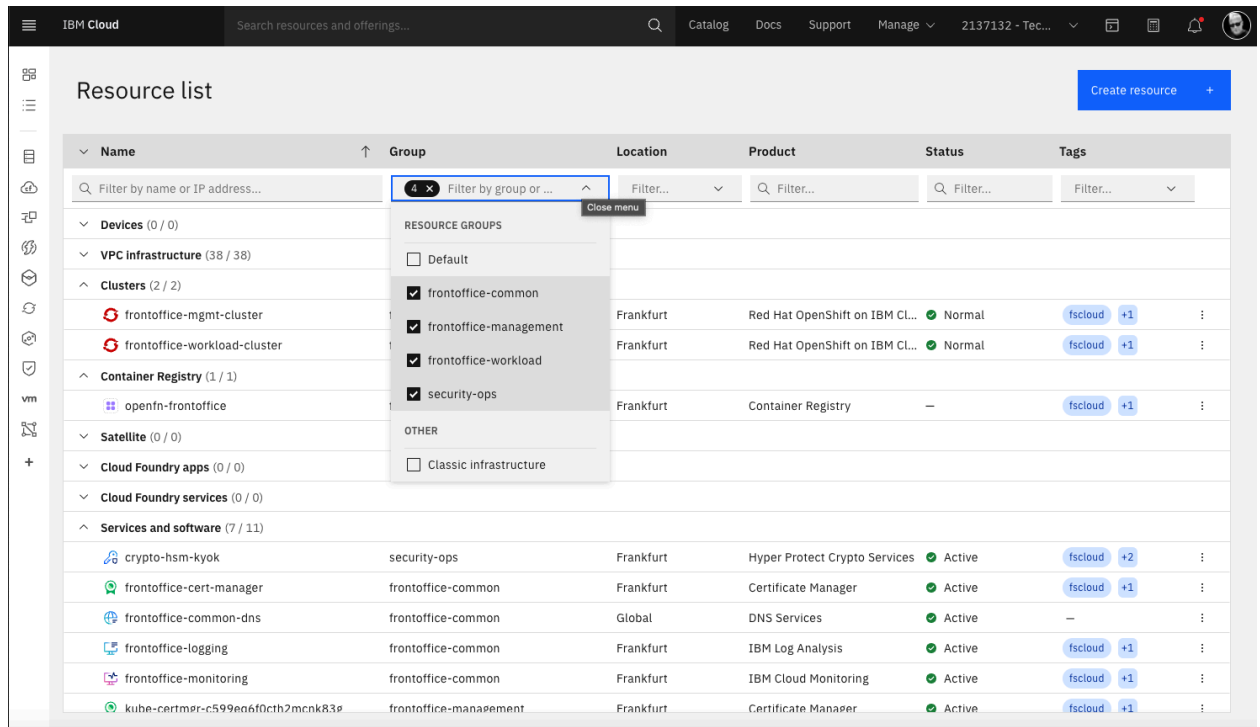
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11. You can access the **Docs** before you start demoing any of the features of IBM Cloud for Financial Services it is worth reading up on the components.
12. To view all the resources in the account, click on the **Menu->Resource list**



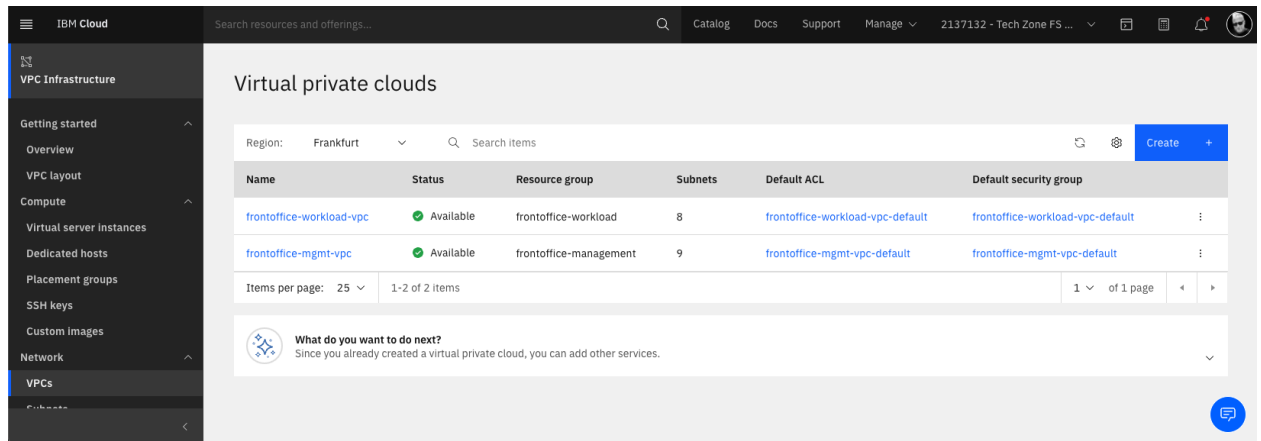
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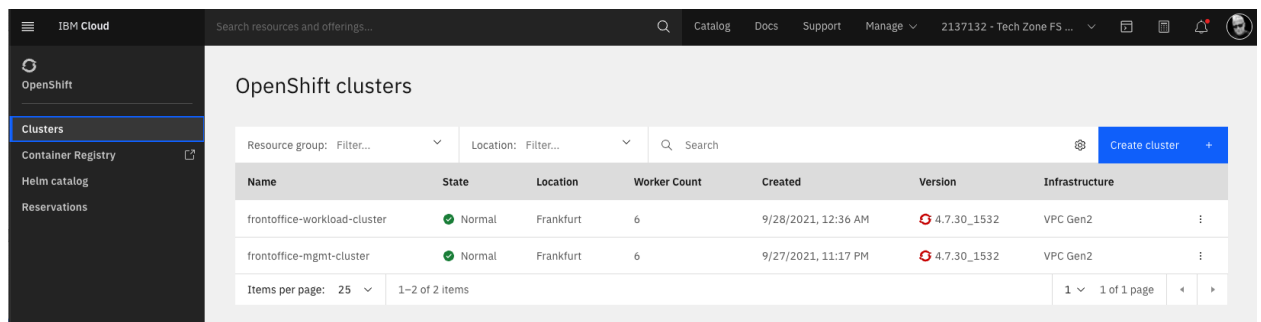
13. The resources are broken into four resource groups. **frontoffice-common**, **frontoffice-management**, **frontoffice-workload** and **security-ops**
14. You can see all the cloud services have been provisioned using the Terraform automation provided by the Ecosystem Engineering team.
 - a. <https://github.com/IBM/ibm-cloud-reference-architectures>
15. This automation was used to setup this account for demo usage. You can see it has provisioned the Management and Workload VPCs with OpenShift inside them. They are protected for access with VPN and Bastion services.
16. You will also see the HSM device for Hyper Protect Crypto is provisioned in **security-ops** resource group. This enables access control by the CISO teams and DevOps teams to only have access to these services. This service is used to encrypt the storage buckets and OpenShift Clusters.
17. Using the menu you have a look around the account. Start with the Virtual Private Cloud instances. The fictitious bank **OpenFN Bank** is based in Frankfurt Europe so we have provisioned all the services out of **London and Frankfurt**.



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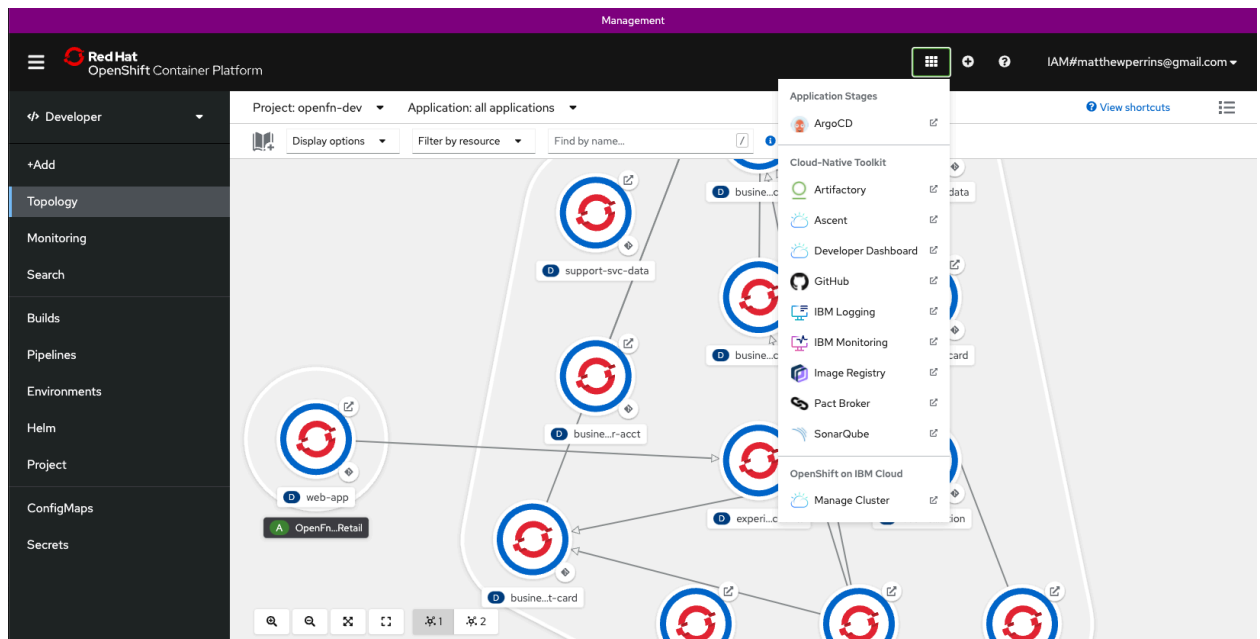
18. You can see to the two VPCs in Frankfurt you can look at the Subnets, Virtual Server Instances, the Floating IP's etc, You can navigate around looking at how the VPC services are provisioned and linked to each of the VPC features.
19. You can navigate to the **Menu -> OpenShift -> Clusters** to see the OpenShift Clusters. You will not be able to view the OpenShift Console if you have not turned on your VPN



20. Click on **management-cluster** have a look at the worker nodes and pools to see the virtual services that are supporting this OpenShift cluster
21. With the VPN connected click on the **OpenShift web console**



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22. You can tell you are in the Management cluster by the purple banner with the title **Management** on it
23. You can see what tools have been installed into this management cluster to help with cloud native development. You should be able to navigate around to these tools and cloud services. These will form part of the demo in later demo guides.

THIS CONCLUDES THE LAB STEPS