# Deep-Dive Addendum: Progressive Path Setup Guide

This addendum provides a practical, step-by-step guide for setting up each track of the "Progressive Complexity Path" on your local development machine using Docker Compose. It outlines the core steps and configuration required to bring up the various components of your enterprise data platform locally.

## **Prerequisites**

Before starting, ensure you have the following installed:

- **Docker Desktop:** (or Docker Engine on Linux) for running containers.
- **Git:** For cloning the project repository.
- Python 3.x: With pip for installing dependencies.
- docker-compose: (usually included with Docker Desktop, or installed separately).

#### **Project Structure Reminder:**

This guide assumes you have cloned the data-ingestion-platform mono-repo, which contains all the necessary Dockerfiles, application code, and docker-compose.yml configurations. data-ingestion-platform/

data/	# Persistent Docker volumes for all services
src/	# Core Python application logic
fastapi_app/	# FastAPI ingestion service
pyspark_jobs/	# Apache Spark transformation jobs (PySpark)
airflow_dags/	# Apache Airflow DAG definitions
	# Grafana dashboards, Grafana Alloy configurations
— openmetadata_ingestion_scripts/ # Python scripts for OpenMetadata connectors	
- docker-compo	se.yml # Central Docker Compose file for local environment
└── README.md	

# **Onboarding Script and External Data Generation**

To streamline the onboarding process and facilitate testing with realistic data, a conceptual onboarding script and an external data generator are utilized.

## **Onboarding Script**

Role Needed: Data Engineer, Developer

This script automates the initial setup of the local environment, ensuring consistency across development machines. It performs tasks such as checking prerequisites, initializing Docker Compose, creating necessary Kafka topics and S3 buckets (MinIO), and setting up initial database schemas.

Conceptual onboard.sh script:

```
#!/bin/bash
# onboard.sh - Onboarding script for local data platform environment
echo "Starting local data platform environment onboarding..."
# --- 1. Check Prerequisites ---
echo "Checking prerequisites (Docker, Git, Python, docker-compose)..."
command -v docker >/dev/null 2>&1 || { echo >&2 "Docker is not installed. Please install Docker
Desktop or Docker Engine."; exit 1; }
command -v docker-compose >/dev/null 2>&1 || { echo >&2 "Docker Compose is not installed.
Please install it."; exit 1; }
command -v python3 >/dev/null 2>&1 || { echo >&2 "Python 3 is not installed. Please install it.";
exit 1; }
echo "Prerequisites met."
# --- 2. Build and Start Core Services (using the main docker-compose.yml) ---
echo "Building and starting core services via docker compose..."
docker compose up --build -d --remove-orphans
# Give services some time to start up and become healthy
echo "Waiting for services to become healthy (this may take a few minutes)..."
# You might add more specific health checks here, e.g., waiting for FastAPI /health endpoint
sleep 60 # Arbitrary wait time, adjust as needed
# --- 3. Initialize Kafka Topics (if Kafka is part of the track) ---
# This part assumes Kafka is running and accessible within the Docker network
if docker ps --format "{{.Names}}" | grep -q "kafka"; then
 echo "Initializing Kafka topics..."
 # Create raw financial transactions topic
 docker exec -it kafka kafka-topics --create --topic raw financial transactions
--bootstrap-server kafka:29092 --partitions 3 --replication-factor 1 --if-not-exists
 # Create raw insurance claims topic
 docker exec -it kafka kafka-topics --create --topic raw insurance claims --bootstrap-server
kafka:29092 --partitions 3 --replication-factor 1 --if-not-exists
 echo "Kafka topics created."
else
 echo "Kafka service not detected, skipping topic creation."
fi
# --- 4. Initialize MinIO Buckets (if MinIO is part of the track) ---
# This part assumes MinIO is running and accessible
if docker ps --format "{{.Names}}" | grep -q "minio"; then
 echo "Initializing MinIO buckets..."
```

```
# Ensure mc client is available in a separate service or installed on host
```

- # For simplicity, we assume mc is available within a utility container or you create buckets manually via API/UI
- # Example if using 'mc' client directly (might need a dedicated 'minio-client' service in docker-compose)
- # docker exec -it minio-client mc alias set local http://minio:9000 minioadmin minioadmin
- # docker exec -it minio-client mc mb local/raw-data-bucket --ignore-existing
- # docker exec -it minio-client mc mb local/curated-data-bucket --ignore-existing
- # Alternative: Use Python MinIO client to create buckets from FastAPI or another init script echo "Please ensure raw-data-bucket and curated-data-bucket are created in MinIO manually or via an automated script."
- echo "You can access MinIO console at http://localhost:9001 and create them manually." else
- echo "MinIO service not detected, skipping bucket creation." fi
- # --- 5. Database Schema Initialization (if applicable) ---
- # For PostgreSQL, you might have a script to apply migrations
- if docker ps --format "{{.Names}}" | grep -q "postgres"; then
- echo "Applying PostgreSQL database migrations..."
- # Example: Run a Flyway/Alembic migration script from a dedicated container or a FastAPI init script
- echo "Ensure your FastAPI service or a dedicated migration container handles database schema initialization."

fi

echo "Onboarding complete. Your local data platform should now be running."

echo "Access FastAPI at http://localhost:8000"

echo "Access MinIO Console at http://localhost:9001"

echo "Access Airflow UI at http://localhost:8080 (if Advanced Track is enabled)"

#### **External Data Generator**

Role Needed: Data Analyst, QA Engineer, Developer

The external data generator is a standalone Python script (e.g., using Locust, as detailed in the Testing & Observability Patterns Deep-Dive Addendum) that simulates incoming data from various sources. This is critical for testing the ingestion layer and populating the data lake with mock, yet realistic, data volumes to simulate production load.

- **Purpose:** To continuously send mock financial transactions and insurance claims to the FastAPI Ingestor, allowing for load testing, functional validation, and populating the data pipeline for downstream processing and analysis.
- Usage: Run this script from your local machine after the FastAPI Ingestor service is up

```
and running. It interacts with the exposed API endpoint.
Conceptual Python script (simulate data.py - simplified version, not a full Locust script):
# simulate data.py
import requests
import ison
import time
from datetime import datetime, timedelta
import random
FASTAPI URL = "http://localhost:8000" # Ensure this matches your FastAPI exposure
DELAY SECONDS = 0.1 # Time between sending each record
def generate financial transaction():
  """Generates a mock financial transaction."""
  return {
    "transaction id":
f"FT-{datetime.now().strftime('%Y%m%d%H%M%S%f')}-{random.randint(1000, 9999)}",
    "timestamp": datetime.now().isoformat(),
    "account id": f"ACC-{random.randint(100000, 999999)}",
    "amount": round(random.uniform(1.0, 10000.0), 2),
    "currency": random.choice(["USD", "EUR", "GBP", "JPY"]),
    "transaction type": random.choice(["debit", "credit", "transfer", "payment"]),
    "merchant id": f"MER-{random.randint(100, 999)}" if random.random() > 0.3 else None,
    "category": random.choice(["groceries", "utilities", "salary", "entertainment", "transport",
"housing", "healthcare", "education"])
  }
def generate insurance claim():
  """Generates a mock insurance claim."""
  return {
    "claim id":
f"IC-{datetime.now().strftime('%Y%m%d%H%M%S%f')}-{random.randint(1000, 9999)}",
    "timestamp": datetime.now().isoformat(),
    "policy number": f"POL-{random.randint(1000000, 9999999)}",
    "claim amount": round(random.uniform(500.0, 50000.0), 2),
    "claim type": random.choice(["auto", "health", "home", "life", "property"]),
    "claim status": random.choice(["submitted", "under review", "approved", "rejected",
"paid"]),
    "customer id": f"CUST-{random.randint(10000, 99999)}",
    "incident date": (datetime.now() - timedelta(days=random.randint(0, 365))).isoformat()
  }
if __name__ == "__main__":
```

```
print(f"Starting data generation. Sending to {FASTAPI URL}")
  while True:
    try:
      # Send financial transaction
      financial data = generate financial transaction()
      response ft = requests.post(f"{FASTAPI URL}/ingest-financial-transaction/",
json=financial data)
      if response ft.status code == 200:
         print(f"Sent financial transaction {financial data['transaction id']} (Status:
{response ft.status code})")
      else:
         print(f"Error sending financial transaction: {response ft.status code} -
{response ft.text}")
      time.sleep(DELAY SECONDS)
      # Send insurance claim
      insurance data = generate insurance claim()
      response ic = requests.post(f"{FASTAPI URL}/ingest-insurance-claim/",
ison=insurance data)
      if response ic.status code == 200:
         print(f"Sent insurance claim {insurance data['claim id']} (Status:
{response ic.status code})")
      else:
         print(f"Error sending insurance claim: {response ic.status code} -
{response ic.text}")
      time.sleep(DELAY SECONDS)
    except requests.exceptions.ConnectionError as e:
      print(f"Connection error: {e}. Is FastAPI running at {FASTAPI URL}? Retrying in 5
seconds...")
      time.sleep(5)
    except Exception as e:
      print(f"An unexpected error occurred: {e}")
      time.sleep(5)
```

# **Setup Guide by Track**

The docker-compose.yml provided with the project is designed to be flexible. You will often comment out or enable services based on the track you are working on.

## 3.1. Starter Track Setup: Minimal Single-Machine Setup

This track focuses on FastAPI, PostgreSQL, and MinIO.

1. Navigate to Project Root:

cd /path/to/your/data-ingestion-platform

#### 2. Prepare docker-compose.yml:

- Open docker-compose.yml.
- **Uncomment** the services for fastapi ingestor, postgres, minio.
- **Comment out** all other services (zookeeper, kafka, spark, airflow, openmetadata, grafana, etc.) to keep the setup minimal.
- Ensure the data/postgres, data/minio directories exist or are created by Docker Compose for persistent volumes.

Conceptual Snippet of docker-compose.yml for Starter Track:# docker-compose.yml (Starter Track focus) version: '3.8' services: postgres: image: postgres:15-alpine environment: POSTGRES DB: main db POSTGRES USER: user POSTGRES PASSWORD: password ports: - "5432:5432" volumes: - ./data/postgres:/var/lib/postgresql/data healthcheck: test: ["CMD-SHELL", "pg\_isready -U user -d main\_db"] interval: 5s timeout: 5s retries: 5 minio: image: minio/minio:latest environment: MINIO ROOT USER: minioadmin MINIO\_ROOT\_PASSWORD: minioadmin ports: - "9000:9000" - "9001:9001" # Console port volumes: - ./data/minio:/data command: server /data --console-address ":9001" healthcheck: test: ["CMD", "curl", "-f", "http://localhost:9000/minio/health/live"]

```
interval: 30s
   timeout: 20s
   retries: 3
 fastapi ingestor:
  build: ./fastapi app
  environment:
   POSTGRES HOST: postgres
   POSTGRES DB: main db
   POSTGRES USER: user
   POSTGRES PASSWORD: password
   MINIO HOST: minio:9000
   MINIO ACCESS KEY: minioadmin
   MINIO SECRET KEY: minioadmin
   MINIO BUCKET: raw-data-bucket
  ports:
   - "8000:8000"
  depends on:
   postgres:
    condition: service healthy
   minio:
    condition: service healthy
  healthcheck:
   test: ["CMD", "curl", "-f", "http://localhost:8000/health || exit 1"]
   interval: 5s
   timeout: 3s
   retries: 5
# ... other services commented out
```

#### 3. Bring Up Services:

docker compose up --build -d

This command builds the Docker images (if necessary) and starts the selected services in detached mode.

#### 4. Verify Setup:

- Access FastAPI health check: http://localhost:8000/health
- Access MinIO Console: http://localhost:9001 (login with minioadmin/minioadmin)
- Use a PostgreSQL client to connect to localhost:5432 with user user, password password, database main db.
- Check Docker logs: docker compose logs -f

## 3.2. Intermediate Track Setup: Adding Streaming Capabilities

This track adds Apache Kafka and Apache Spark to the Starter Track components.

#### 1. Navigate to Project Root:

cd /path/to/your/data-ingestion-platform

#### 2. Prepare docker-compose.yml:

- Open docker-compose.yml.
- Uncomment (or keep uncommented from Starter Track) fastapi\_ingestor, postgres, minio.
- **Uncomment** the services for zookeeper, kafka, and spark.
- Comment out other Advanced Track services (airflow, openmetadata, grafana, etc.).
- Update fastapi\_ingestor to publish to Kafka (remove direct MinIO/PostgreSQL writes, or add Kafka producer logic). Ensure KAFKA\_BROKER environment variable points to kafka:29092.
- Ensure spark service configuration is set to connect to kafka and minio. Set checkpoint locations for Spark Structured Streaming.
- Ensure data/spark-events directory exists for Spark history server.

Conceptual Snippet of docker-compose.yml for Intermediate Track (partial, focusing on additions):# docker-compose.yml (Intermediate Track focus)

```
version: '3.8'
services:
 # ... postgres, minio (from Starter Track)
 zookeeper:
  image: confluentinc/cp-zookeeper:7.4.0
  environment:
   ZOOKEEPER CLIENT_PORT: 2181
  healthcheck:
   test: ["CMD-SHELL", "echo stat | nc localhost 2181"] # Basic Zookeeper health
   interval: 5s
   timeout: 5s
   retries: 10
 kafka:
  image: confluentinc/cp-kafka:7.4.0
  depends on:
   zookeeper:
    condition: service healthy
  ports:
   - "9092:9092" # External for host tools
  environment:
```

PLAINTEXT://kafka:29092,PLAINTEXT\_HOST://localhost:9092 KAFKA LISTENER SECURITY PROTOCOL MAP:

PLAINTEXT:PLAINTEXT,PLAINTEXT\_HOST:PLAINTEXT

KAFKA ZOOKEEPER CONNECT: 'zookeeper:2181'

KAFKA BROKER ID: 1

KAFKA ADVERTISED LISTENERS:

KAFKA\_INTER\_BROKER\_LISTENER\_NAME: PLAINTEXT KAFKA OFFSETS TOPIC REPLICATION FACTOR: 1

KAFKA\_DELETE\_TOPIC\_ENABLE: "true" # For development

```
healthcheck:
   test: ["CMD-SHELL", "kafka-topics --bootstrap-server localhost:9092 --list"]
   interval: 10s
   timeout: 5s
   retries: 10
 fastapi ingestor:
  build: ./fastapi app
  environment:
   # ... (Postgres, Minio from Starter Track if still needed for metadata)
   KAFKA BROKER: kafka:29092 # New: FastAPI publishes to Kafka
   KAFKA TOPIC FINANCIAL: raw financial transactions
   KAFKA TOPIC INSURANCE: raw insurance claims
  depends on:
   # ... postgres, minio
   kafka: # New dependency
    condition: service healthy
  # ... healthcheck
 spark:
  image: bitnami/spark:3.5.0
  command: ["tail", "-f", "/dev/null"] # Keep container alive for spark-submit
  environment:
   SPARK MASTER URL: "spark://spark-master:7077" # Assuming spark-master service
   SPARK LOCAL IP: spark # For internal networking
   SPARK DAEMON JAVA OPTS:
"-Dspark.history.fs.logDirectory=file:///opt/bitnami/spark/spark-events"
   # Kafka connectivity for Spark jobs
   KAFKA BROKER ADDRESS: kafka:29092
   MINIO HOST: minio
   MINIO ACCESS KEY: minioadmin
   MINIO SECRET KEY: minioadmin
   MINIO BUCKET RAW: raw-data-bucket
   MINIO BUCKET CURATED: curated-data-bucket
  volumes:
   - ./pyspark jobs:/opt/bitnami/spark/jobs # Mount your PySpark jobs
   - ./data/spark-events:/opt/bitnami/spark/spark-events # For Spark History Server
  depends on:
   kafka:
    condition: service healthy
   minio:
    condition: service healthy
  # No exposed ports if only used internally by Airflow or manual spark-submit
  # If you need Spark UI, expose 8080:8080 (master) and 8081:8081 (worker) for
manual debugging
 # Optional: Spark History Server
 spark-history-server:
```

```
image: bitnami/spark:3.5.0
command: ["/opt/bitnami/spark/bin/spark-history-server.sh"]
environment:
    SPARK_HISTORY_FS_LOGDIRECTORY: "/opt/bitnami/spark/spark-events"
ports:
    - "18080:18080" # Spark History UI
volumes:
    - ./data/spark-events:/opt/bitnami/spark/spark-events
depends_on:
    spark:
    condition: service_started
# ... other services commented out
```

#### 3. Bring Up Services:

docker compose up --build -d

#### 4. Verify Setup:

- Verify Starter Track components are running.
- Check Kafka topic creation: docker exec -it kafka kafka-topics --bootstrap-server localhost:9092 --list
- Run a sample Spark streaming job (e.g., via docker exec -it spark spark-submit /opt/bitnami/spark/jobs/streaming\_consumer.py <args>).
- Check Spark History Server: http://localhost:18080 (if enabled).

## 3.3. Advanced Track Setup: The Full Production-Ready Stack

This track integrates orchestration, observability, lineage, and metadata management.

#### 1. Navigate to Project Root:

cd /path/to/your/data-ingestion-platform

#### 2. Prepare docker-compose.yml:

- Uncomment all services including airflow-init, airflow-webserver, airflow-scheduler, airflow-worker, mongodb, openmetadata, grafana, grafana-alloy, cAdvisor, spline.
- Ensure all necessary environment variables for inter-service communication are correctly set (e.g., Airflow connecting to Spark, OpenMetadata connecting to PostgreSQL/MongoDB, Grafana Alloy pointing to Prometheus/OpenTelemetry targets).
- Mount airflow\_dags and observability directories as volumes for Airflow DAGs and Grafana configurations.
- Ensure all data/ subdirectories for persistent volumes exist.

Conceptual Snippet of docker-compose.yml for Advanced Track (partial, focusing on additions):# docker-compose.yml (Advanced Track focus)

version: '3.8' services:

```
# ... postgres, minio, zookeeper, kafka, spark, spark-history-server
mongodb:
 image: mongo:6.0
 ports:
  - "27017:27017"
 volumes:
   - ./data/mongodb:/data/db
  healthcheck:
   test: ["CMD", "mongosh", "--eval", "db.adminCommand('ping')"]
   interval: 5s
   timeout: 5s
   retries: 5
airflow-init:
 image: apache/airflow:2.8.0
 entrypoint: ["/bin/bash", "-c"]
 command:
   - "airflow db migrate && airflow users create --username admin --password admin
--firstname Admin --lastname User --role Admin --email admin@example.com"
 environment:
   PIP ADDITIONAL REQUIREMENTS: "apache-airflow-providers-cncf-kubernetes
apache-airflow-providers-apache-kafka apache-airflow-providers-cncf-kubernetes
apache-airflow-providers-postgres delta-spark"
   AIRFLOW HOME: /opt/airflow
   AIRFLOW CORE LOAD EXAMPLES: "false"
   AIRFLOW DATABASE SQL ALCHEMY CONN:
"postgresgl+psycopg2://user:password@postgres/main_db"
   AIRFLOW__WEBSERVER_ RBAC: "True"
   AIRFLOW CORE DAGS FOLDER: /opt/airflow/dags
 volumes:
   - ./airflow dags:/opt/airflow/dags
   - ./src:/opt/airflow/src # Mount source code for Airflow to access
  depends on:
   postgres:
    condition: service healthy
airflow-webserver:
 image: apache/airflow:2.8.0
 command: webserver
  ports:
  - "8080:8080" # Airflow UI
 environment:
   AIRFLOW HOME: /opt/airflow
   AIRFLOW CORE LOAD EXAMPLES: "false"
   AIRFLOW DATABASE SQL ALCHEMY CONN:
"postgresgl+psycopg2://user:password@postgres/main_db"
   AIRFLOW WEBSERVER RBAC: "True"
```

```
AIRFLOW CORE DAGS FOLDER: /opt/airflow/dags
 volumes:
   - ./airflow dags:/opt/airflow/dags
   - ./src:/opt/airflow/src
 depends on:
   airflow-init:
    condition: service completed successfully
airflow-scheduler:
 image: apache/airflow:2.8.0
 command: scheduler
 environment:
   AIRFLOW HOME: /opt/airflow
   AIRFLOW CORE LOAD EXAMPLES: "false"
   AIRFLOW DATABASE SQL ALCHEMY CONN:
"postgresgl+psycopg2://user:password@postgres/main_db"
   AIRFLOW WEBSERVER RBAC: "True"
   AIRFLOW CORE DAGS FOLDER: /opt/airflow/dags
   AIRFLOW CORE EXECUTOR: LocalExecutor # For local testing; CeleryExecutor for
distributed
 volumes:
   - ./airflow dags:/opt/airflow/dags
   - ./src:/opt/airflow/src
 depends on:
   airflow-webserver:
    condition: service healthy
 # Airflow Worker (optional for local, if using CeleryExecutor)
 # airflow-worker:
# image: apache/airflow:2.8.0
# command: worker
# environment:
# # ... same as scheduler, plus Celery config
# depends_on:
# airflow-scheduler:
     condition: service healthy
openmetadata:
 image: openmetadata/openmetadata:1.2.3-release
  ports:
   - "8585:8585" # OpenMetadata UI
  environment:
   # ... OpenMetadata configuration for MySQL, Elasticsearch (using data/ volumes)
   # Make sure it points to your local Postgres for ingestion metadata
   MYSQL HOST: openmetadata mysql # Or your specific MySQL service
   ELASTICSEARCH HOST: openmetadata elasticsearch # Or your specific ES service
  depends on:
   # ... openmetadata mysql, openmetadata elasticsearch (or equivalent)
```

```
spline:
  image: absaoss/spline-rest-server:0.7.1 # Or latest
   - "8081:8081" # Spline UI
  environment:
   SPLINE DATABASE URL: "jdbc:postgresql://postgres:5432/main db"
   SPLINE DATABASE USERNAME: user
   SPLINE DATABASE PASSWORD: password
  depends on:
   postgres:
    condition: service healthy
   spark:
    condition: service started
 grafana:
 image: grafana/grafana-oss:10.2.0 # Or latest
   - "3000:3000"
 volumes:
   - ./data/grafana:/var/lib/grafana
./observability/grafana datasources provisioning:/etc/grafana/provisioning/datasources
./observability/grafana dashboards provisioning:/etc/grafana/provisioning/dashboards
  environment:
   GF AUTH ANONYMOUS ENABLED: "true" # For quick local access
   GF AUTH ANONYMOUS ORG ROLE: Admin
   GF SERVER ROOT URL: "http://localhost:3000"
   GF INSTALL PLUGINS: "grafana-piechart-panel" # Example plugin
  depends on:
   grafana-alloy:
    condition: service healthy
 grafana-alloy:
  build:
   context: ./observability
   dockerfile: Dockerfile.alloy # Custom Dockerfile for Grafana Alloy config
  volumes:
   - ./observability/alloy-config.river:/etc/alloy/config.river
  command: ["--config.file=/etc/alloy/config.river"]
  ports:
   - "12345:12345" # OpenTelemetry receiver
   - "9090:9090" # Prometheus metrics endpoint for self-monitoring
  depends on:
   # Link to services it collects from
   fastapi ingestor:
    condition: service healthy
```

kafka:

condition: service healthy

spark:

condition: service\_healthy

cAdvisor:

condition: service healthy

#### cAdvisor:

image: gcr.io/cadvisor/cadvisor:v0.47.0 # Or latest stable

volumes:

- /:/rootfs:ro
- /var/run:/var/run:rw
- /sys:/sys:ro
- /var/lib/docker/:/var/lib/docker:ro
- /dev/disk/:/dev/disk:ro

privileged: true

ports:

- "8080:8080" # cAdvisor UI (can clash with Airflow, adjust if needed)

# No healthcheck for simplicity, but a proper one would check metrics endpoint

#### 3. Bring Up Services:

docker compose up --build -d

#### 4. Verify Setup:

- Access Airflow UI: http://localhost:8080 (login admin/admin)
- Access Grafana UI: http://localhost:3000 (initially anonymous or configure adminuser)
- Access OpenMetadata UI: http://localhost:8585
- Verify Spline UI: http://localhost:8081
- Check for container metrics in Grafana dashboards.
- Ensure Airflow DAGs appear and run as expected.
- o Run data ingestion, processing, and observe metrics, lineage, and metadata.

This guide provides the core steps. Remember that exact configurations may vary based on your specific implementation of each component. Always consult the detailed documentation for each individual technology if you encounter issues.