# Planning Checklist (minimum of four weeks out)

|  |  |
| --- | --- |
| Choose a date and location |  |
| Secure presenters and proctors | Contact John Lucas [John.Lucas@ibm.com](mailto:Kate.Webster@ibm.com) if you cannot find an appropriate resource; he might be able to help. |
| Events at TEC locations:  TEC Request | * See: <http://ibm.biz/TEC-reservations> * This includes the room reservation, iPad and computer setup. |
| Events at non-TEC locations:  Schedule a room | * For Non-TEC or remote locations, reserve a room through Notes. * If you are not familiar with the location, contact the site coordinator for more insight into which room would best suit the capacity, projector, room setup including power needs. * Primary contacts for IBM sites: <http://ibm.biz/IBM-workplaces> * Additional references: [Site Contacts List](#_Addendum:_Site_Contacts_1)   For customer or Business Partner site workshops, make sure they have a room with the following   1. Projector and screen 2. Enough power outlets and/or Power supply strips for all the attendees to use for the day 3. High speed internet sufficient to drive all attendees using remote access to the clusters. 4. Review Skytap firewall considerations in section 6. |
| Image provisioning:  DTE Skytap account | See: [IBM Demos / DTE Skytap provisioning](#_DTE_/_CSIDE_1) |
| Send out IBM internal calendar invitations | * Once all the above is secured, send out calendar invitations to all IBM parties involved to reserve the dates of the event on their calendars. * Don’t forget to add the day-before prep date & time. |
| CTEBA completion (optional) | * If you have not done so, complete "Rules of the Road CTEBA Education" (It only needs to be completed one time.) * See: <https://w3.ibm.com/w3publisher/cteba> |

# Preparation Checklist (two weeks to one week out)

|  |  |
| --- | --- |
| Confirm presenters and proctors |  |
| Confirm room seating capacity |  |
| Confirm cluster image request |  |
| Prep call | * Attend the TEC Coordinator Prep Call – it should be scheduled about 10 days prior to the event. * If not using a TEC, consider holding your own call anyway to make sure everyone is on the same page. |
| Order printing for lab workbooks | * Should be ordered at least one week prior to the event. * Always get latest lab workbooks here: * <https://ibm.box.com/v/Workshop-Workbook-Core-v9> * <https://ibm.box.com/v/Workshop-Workbook-Deeper-v9> * IBM Repro Print departments and contact emails by location here: <http://ibm.biz/IBM-reprographics> |
| Confirm iPads to be prepared with workbook (if using TEC) | If not printing the workbooks, then the TEC should be preparing the iPads with the workbook PDFs. Note: Make sure they will be doing this with the latest lab workbook. |
| Send list of attendees (if using TEC) | Send the list of attendees to TEC coordinator at least one week prior to the event. |
| Confirm “day of” details | * Call TEC, remote location Site Coordinator, customer or business partner to confirm arrival times on the setup and workshop days. * Confirm entrance details. Example: does a list of attendees need to be sent to security and/or should there be IBM escorts at the front door to walk guests in? If attending a customer site, who will walk whom in? |
| Confirm internet access at the workshop site  (Important! The workshop will not run without it!) | * This can be a wireless setup at the TEC locations – the TECs should ensure all laptops/desktops have internet access. * If at another site (like an IBM satellite, or client location) confirm internet access is available and will support the workshop. * Request temporary wireless IDs (if necessary) here:   <http://ibm.biz/IBM-wireless-IDs> |
| Send reminder to confirm Attendance | * If not using the OET tool, send 5 days before the event. * The OET tool will automatically send out a reminder to those who have registered; the default is 5 days before the event but it can be changed if needed. |
| Order Continental Breakfast (including coffee & beverages) | * Order a few days before the event. * Suggestion to have this arrive about 7:30AM-7:45AM. * Options will vary based on location: Panera is always a sure bet. * Be sure to account for some vegetarian and gluten free options. |
| Order Lunch  (including beverages) | * Order a few days before the event. * Suggestion to have this arrive 11:30AM-11:45AM. * Options will vary based on location: Panera is always a sure bet. * Be sure to account for vegetarian and gluten free options. * Note: many have safely opted for ~1/3 of the sandwiches to be vegetarian. |
| Print event sign-in sheet | * This is to capture the final list of those who attended to share with everyone involved. * See: <https://ibm.box.com/v/CPD-Workshop-SignIn-v9> |

# Delivery Checklist (day before, day of, and day after)

|  |  |
| --- | --- |
| Arrive early & set up | * Ensure everything is in place at the workshop site (laptops, iPads or printed workbooks, etc.) * Start the cluster images - see: [IBM Demos / DTE Skytap provisioning](#_DTE_/_CSIDE_1) & the [Getting Started Guide](https://ibm.box.com/v/Workshop-Getting-Start-PDF-v9) |
| Present | Use [latest presentation](https://ibm.box.com/v/Workshop-Presentation-PDF-v9) |
| Client Survey | * Near end of event, make sure clients fill out surveys. * Also, send a follow up email to ensure everyone completed it. |
| Record event in GRP | * Global Registration Portal is essential for monitoring and follow-up.   See: <https://ibm.box.com/s/1o2neyl8wdcn8670qvmwnaq1b79crq91> |

# Optional Checklist items

|  |  |
| --- | --- |
| Order schwag | e.g. Dummies books and notepads to handout |
| Calendar invitations for customers |  |
| Get tent cards / name tags |  |
| City Meetups | * For those locations that align with our 9 IBM Cloud- create a reference/pointer to your workshop in Meetup.com. * Meetup cities include Atlanta, Boston, Chicago, Dallas, Detroit, Minneapolis/St. Paul, New York, San Francisco and Toronto. |

# HCCX/TEC Request

## Fill out the form

* Follow the link to enter a new request: <https://natecs.raleigh.ibm.com/tec-reservations/>

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* Make sure to fill out every starred section.
* When filling in the **Location of software image** please enter **IBM Journey to Cloud and A.I. - Analytics Modernization Workshop v3.0.1 - Featuring Cloud Pak for Data** and for the **Software image contact** please enter **John Lucas/US/IBM** **A screenshot of a cell phone

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## Limits for numbers of environments

* For this workshop there are limited amounts of clusters that can be provisioned per day, per region. **Please reach out prior to the event if you are looking for a workshop larger than environments.**

# DTE / CSIDE Skytap cluster environment provisioning

## First time doing a workshop?

* You can practice by reserving **one** workshop cluster here: [ibm.biz/dte-cpd-workshop-v9](http://ibm.biz/dte-cpd-workshop-v9)

*Note: This requires VPN access to reserve the single instance.*

## Limits for numbers of environments

* For this workshop there are limited amounts of clusters that can be provisioned per day, per region, and only for the regions that support 24 core VMs.

See: <https://help.skytap.com/overview-features.html>

Currently that limit is 8 clusters for a maximum of 2 days

## CSIDE Request

* To request a group of cluster environments, go to: <https://www.ibm.com/demos/workshops/reserve>
* When putting in the request make sure to fill out all aspects of the form. The name of the workshop is: **Cloud Pak for Data. IBM Journey to Cloud and A.I. Analytics Modernization Workshop (V9.0)**.
* **Template – US-Central =** [**1972921**](https://urldefense.proofpoint.com/v2/url?u=https-3A__cloud.skytap.com_templates_1972921&d=DwMCaQ&c=jf_iaSHvJObTbx-siA1ZOg&r=GSbUk5-l9IgzRfGCb8X_2SbLJxaf621h_vWii0q1xBc&m=yFUAfGXWq2MGMjL8PzG6pdmhWffnFlHUbKSERQ1HmH8&s=AyoTI67bAWkRCh7o_JXnpRTg4U9tX2KvBChNJKVDyV8&e=)
* **Template - EMEA =** [**1972923**](https://urldefense.proofpoint.com/v2/url?u=https-3A__cloud.skytap.com_templates_1972921&d=DwMCaQ&c=jf_iaSHvJObTbx-siA1ZOg&r=GSbUk5-l9IgzRfGCb8X_2SbLJxaf621h_vWii0q1xBc&m=yFUAfGXWq2MGMjL8PzG6pdmhWffnFlHUbKSERQ1HmH8&s=AyoTI67bAWkRCh7o_JXnpRTg4U9tX2KvBChNJKVDyV8&e=)
* **Template – APAC-2 =** [**1972925**](https://urldefense.proofpoint.com/v2/url?u=https-3A__cloud.skytap.com_templates_1972921&d=DwMCaQ&c=jf_iaSHvJObTbx-siA1ZOg&r=GSbUk5-l9IgzRfGCb8X_2SbLJxaf621h_vWii0q1xBc&m=yFUAfGXWq2MGMjL8PzG6pdmhWffnFlHUbKSERQ1HmH8&s=AyoTI67bAWkRCh7o_JXnpRTg4U9tX2KvBChNJKVDyV8&e=)
* If you would also like to put a survey URL use the following link: <http://ibm.biz/wssurvey>

## Event Location/Email

* When your request is processed your event will show up under My WorkshopsGraphical user interface, website

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Note: The workshop will not be active until the start time you provided in your request.

* When the request has fully gone through you will also receive an email notification with all the information as well.

Graphical user interface, text, application, email

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## Create a shortened URL

* Create a shorted URL for this link so that you can easily type these on each student computer, or the student can type for themselves.

See: <https://tinyurl.com/>

See: <https://snip.innovate.ibm.com/>

## More Information

* For more information regarding using the workshop manager refer to the Workshop Manager User Guide here: <http://ibm.biz/WorkShopManagerUserGuide> or see the Workshop Manager Home Page here: <http://ibm.biz/WorkshopManager>

## Create a shortened URL

* Create a shorted URL for this link so that you can easily type these on each student computer, or the student can type for themselves.

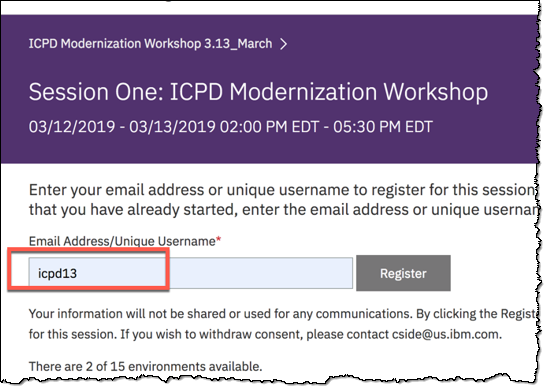
See: <https://tinyurl.com/>

See: <https://snip.innovate.ibm.com/>

## Register Identifiers

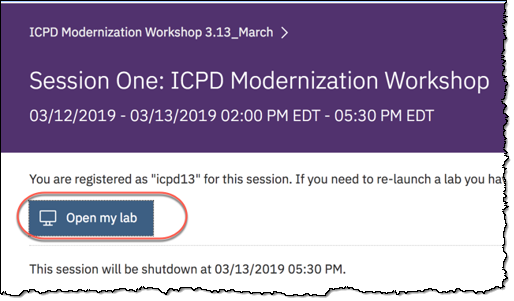
* You can start each session and give it an identifier (e.g. icpd01, icpd02, etc.).

You will need to register each identifier (which you can assign to each student):



## Launching the cluster environment

* You can launch the CPD cluster image on the next screen:



Hint: Launch one environment ahead of time as soon as possible to make sure it can boot, often the evening before. Shut it down afterwards if the workshop is not taking place within a few hours.

## Problems with the provisioned environments?

* Open a high severity ticket:<https://ibm.biz/dte-support>
* Or use the Slack channel:[#dte-workshop-support](https://app.slack.com/client/T7S9Q951A/CTA2MV9AM)

## Search for scheduled workshop events:

<https://bluedemos.com/event/search>

From there search for “Analytics Modernization”

# Workshop setup recommendations

## Cluster identifier (username) and shortened URL process

* Consider setting up your identifier (usernames) and shortened session URL the day before the event.
* Email this information to colleagues who may be assisting you with the workshop.
* If you are using IBM laptops, start a different cluster environment on each laptop and write the cluster identifier (username) on a sticky note and put it on the back of the laptop to remember which laptop is using which cluster. (This will be important later if a student accidently closes the browser completely.)
* If students are using their own laptops, assign each username to a student as they come in the workshop – write these on a whiteboard to remember who has which cluster environment.

## Cluster starting process

* Practice starting a cluster the afternoon or evening before your event if you are not familiar with the process.
* Each cluster can take 35 minutes to start, including some manual work to get them operational.
* Get assistance to help you start clusters if you are using 10 or more for the workshop.

## Laptop/desktop requirements for the best experience

* Large screens – the bigger the better for using a platform like CPD (tiny screens will not work well.)
* DO NOT try using a tablet (which includes iPADs.)
* A mouse – using only a keyboard is very difficult with the CPD console.
* Chrome or Firefox installed – other browsers can fail during certain lab exercises.
* Skytap provides browser-based access to your VM through their Secure Remote Access (SRA) client. Requirements to use the SRA client include:
* Minimum download speed of 1.2 Mbit/s (150 kbyte/s) for each concurrent browser session with a VM.
* Low latency (150ms or less) to the data center where your VMs are located

## Running the workshop

* You should consider starting your clusters between 6:00 and 7:00 am.
* Make sure the attendee can access the workshop cluster and have them launch the CPD console to keep the cluster image active so it will not suspend. Have them do after they take their seat.
* Have the students start on the first lab even before the event starts if they are there early enough and wish to do something while waiting.
* Start the workshop early, keep intros and the opening short, get to the labs as quickly as possible.
* Keep lunch short and encourage students to take their own breaks during lab time.
* Encourage the students to do each lab as they encounter them, not waiting for the next lecture. This workshop is lab intensive and some students will not finish it, so make as much time for the labs as possible. Insert lectures into the lab time when a quorum of students finish the labs from each part of the workshop.

## Lab completion times

These are the approximate times needed for each lab. Plan your day accordingly:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Core** | Part 1 | Getting Started  Business Use Case | Lab 01  Lab 02 | 20 min.  20 min. |
|  | Part 2 | Collect Part 1 – Connect  Organize  Collect Part 2 – Virtualize | Lab 03  Lab 04  Lab 05 | 20 min.  50 min.  30 min. |
|  | Part 3 | Analyze: AutoAI  Deploy  Infuse: Watson OpenScale  Infuse: Cognos Analytics Intro  Wrap-up | Lab 06  Lab 07  Lab 08  Lab 09  Lab 10 | 50 min.  20 min.  45 min.  35 min.  10 min. |
|  |  | TOTAL |  | 300 min (5 hours) |
| **Deeper Dive** |  | Data Virtualization caching | Lab 11 | 45 min. |
|  |  | Data Virtualization z/OS | Lab 12 | 45 min. |
|  |  | Organize Deep Dive | Lab 13 | 75 min. |
|  |  | Analytics Dashboard | Lab 14 | 35 min. |
|  |  | SPSS with NPS | Lab 15 | 30 min. |
|  |  | NPS Intro | Lab 16 | 30 min |

## Skytap Firewall Considerations (IPs and ports)

See: <https://help.skytap.com/IP_Addresses_and_Port_Ranges.html>

This is in case you do this workshop at a client’s location and need to open ports for Skytap.

# Workshop shutdown recommendations

* Stop any unused clusters after the event is started and you are sure they will not be needed.
* Stop any clusters assigned to students who finish and leave the event early.
* Stop all clusters after the workshop event is over.

# Accessing the cluster

## From HCCX (TEC) servers

|  |  |
| --- | --- |
| cp4d project namespace | Access via node port 31843 with corresponding public IP address and 31843 port opened inbound.  Alternatively, a route can be defined with nip.io using the assigned public IP address. |
| zen project namespace | Access via node port 31844 with corresponding public IP address and 31844 port opened inbound.  Alternatively, a route can be defined with nip.io using the assigned public IP address. |
| Desktop | Available on master1 and can be accessed using vSphere or if Guacamole VNC is setup. |
| PA | Available with /etc/hosts update or Guacamole VNC setup. |
| OpenShift | Available with /etc/hosts update or Guacamole VNC setup. |
| ssh | Available when accessing TEC network using VPN. |

## From Skytap

|  |  |
| --- | --- |
| cp4d project namespace | Access via Skytap published service where our port 31843 is mapped to something similar to https://services-emea.skytap.com:12345 |
| zen project namespace | Access via Skytap published service where our port 31844 is mapped to something similar to https://services-emea.skytap.com:23456 |
| Desktop | Available on master1 and can be accessed using Skytap interface. |
| PA | Available via desktop browser on master1. |
| OpenShift | Available via desktop browser on master1 or scripts accessible via ssh. |
| ssh | Access via Skytap published service where port 22 is accessible with "ssh services-emea.skytap.com -p 34567". |

# Addendum: Skytap concepts

Skytap provisioned clusters are subjected to the following concepts:

**Provisioned Time**

How long a provisioned cluster environment exists on disk in Skytap. Running or not, a provisioned cluster can only exist for the duration of your request.

**Suspend Time**

How long an environment can continue running without it being used. ("Running" means booted up and active.) If you don't in some way touch or use our workshop cluster after that time, it will suspend. In a Kubernetes environment this essentially crashes the cluster requiring a reboot.

**Rate Limit**

You may see a message about this when the VMs are changing their power state during boot up time. This means that Skytap will queue the boot up of these images so that it spreads the resource usage around between the VMs. The message will usually disappear once the cluster is up and running.

# Addendum: Site Contacts List

|  |  |  |
| --- | --- | --- |
| **City** | **Contact** | **Comments** |
| Cambridge | Sam Haider - mailroom | 75 Binney Street |
| Cambridge | Kellie Fiore | One Rogers Street |
| Cleveland | Lynn Salamon - mailroom | 10500 Cedar Ave, Cleveland, OH 44106 |
| Columbus | Brittany Luckett - mailroom | 4600 Lakehurst Court, Dublin OH 43016 |
| Costa Mesa | Ramiro Cardenas - mailroom | 600 Anton Blvd, Costa Mesa, CA 92626 |
| Denver | Brett Wise - mailroom | 4700 S. Syracuse Street, Denver, CO 80237 |
| Houston |  | Two Riverway, Suite 1500, Houston, TX 77056 |
| Milwaukee |  | \*No IBM Location in Milwaukee\* Possibly IBM in Hartland, WI: 900 Walnut Ridge Drive, Hartland, WI 53029 (Site contact: Jean Wockenfuss) |
| Missouri |  | IBM location at 555 Maryville University Drive, St. Louis, MO 63141. However, they do NOT have a mailroom so we would have to ship to/from a nearby UPS Store. |
| Oregon |  | \*Need alternate location\* -Salem OR is not a general IBM site. -Hillsboro OR is not a secure facility so laptops cannot keep laptops set up overnight per RESO. |
| Phoenix | McAurthur Osborne | 2929 N. Central Ave, Phoenix AZ 85012 |
| San Francisco | Raul Navarette - mailroom | 425 Market Street, San Francisco, CA 94105 |
| Seattle | Lance Jackson - 206-393-0113 - mailroom | 1200 5th Avenue, 9th floor, Seattle WA 98101 |
| Southfield, MI | [DavidJo@us.ibm](mailto:DavidJo@us.ibm) - 248-552-4163 - mailroom | 18000 West Nine Mile Road, Southfield, MI 48075 |

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