



**EDB™ Ark**

# **Getting Started Guide**

**Version 3.3**

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by EnterpriseDB® Corporation  
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# 1 Introduction

EDB Ark automatically provisions PostgreSQL or EDB Postgres Advanced Server databases in single instances, high-availability clusters, or application development sandboxes. EDB Ark frees DBAs and application developers from the rigors of setting up and administering robust database environments. In minutes, EDB Ark configures a cluster of database machines with:

- Streaming replication
- Connection pooling
- Load balancing
- Automatic failover (transaction or recovery time preferred)
- Secure data encryption
- Rotating user-scheduled backups
- Point-in-time recovery
- Elastic storage
- Elastic scale out

EDB Ark's automatic scaling of storage resources and scale out of read replicas when a database cluster reaches user-defined thresholds provides unattended, around-the-clock responsiveness to unpredictable load demands on your database infrastructure.

This document will demonstrate how to use the EDB Ark console successfully in your cloud-based database management activities:

- **EDB Ark - Overview** – Section [2](#) provides information about EDB Ark functionality and architecture.
- **Accessing the Ark Console** – Section [3](#) provides details about connecting to the Ark console.
- **Using the Ark Console** – Section [4](#) introduces you to the EDB Ark graphical user interface, and provides an overview of the functionality offered by the user interface controls.
- **Creating a New Server Cluster** – Section [5](#) walks you through how to create a server cluster, and how to create a developer sandbox.
- **Connecting an Application** – Section [6](#) describes how to locate connection information for your server nodes, so your client applications can access your cluster.

- **Managing Backups and Recovery** - Section [7](#) describes how to backup or restore a database hosted on EDB Ark.
- **Automatic Failover** – Section [8](#) discusses EDB Ark failover functionality.
- **Manual Scaling** – Section [9](#) describes how to manually scale up your database cluster by adding replica nodes or memory.
- **Automatic Scaling** – Section [10](#) discusses how to set the automatic scale up thresholds for your database.
- **Load Balancing** – Section [11](#) discusses how to use load balancing to optimize client performance.
- **Customizing Your Cluster** - Section [12](#) discusses some of the ways you can customize your Ark cluster.
- **Database Management** – Section [13](#) provides information about performing administrative tasks on an Ark cluster.
- **Troubleshooting** – Section [14](#) provides helpful troubleshooting resources, and detailed information about how to recover from a console failure.

This document provides an introduction to EDB Ark and is written to acquaint you with the process of configuring and using the product's core features; it is not a comprehensive guide to using EnterpriseDB database products. Depending on your operating environment, there may be differences in EDB Ark features and functions.

For more information about using EnterpriseDB products, please visit the EnterpriseDB website at:

<http://www.enterprisedb.com/documentation>

This document uses *Postgres* to mean either the PostgreSQL or EDB Postgres Advanced Server database.

## 1.1 What's New

The following features have been added to the EDB Ark console for release 3.3:

- A call to the `/options/roleinfos` resource returns a list of AWS externalId/roleArn pairs; for more information, see the *EDB Ark API User's Guide*.
- A call to the `/options/vpcids/{tenant}?usePrivateIps=[true | false]` resource returns information about private IP support; for more information, see the *EDB Ark API User's Guide*.

## 1.2 Typographical Conventions Used in this Guide

Certain typographical conventions are used in this manual to clarify the meaning and usage of various commands, statements, programs, examples, etc. This section provides a summary of these conventions.

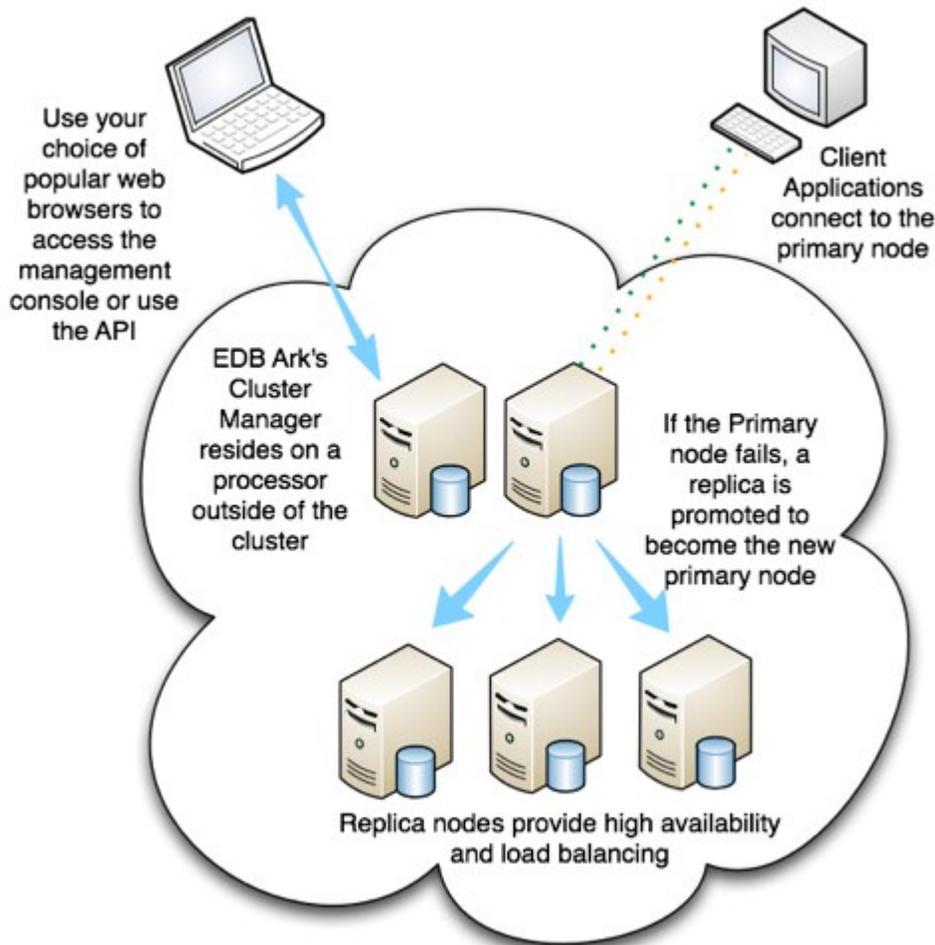
In the following descriptions a *term* refers to any word or group of words that are language keywords, user-supplied values, literals, etc. A term's exact meaning depends upon the context in which it is used.

- *Italic font* introduces a new term, typically, in the sentence that defines it for the first time.
- Fixed-width (mono-spaced) font is used for terms that must be given literally such as SQL commands, specific table and column names used in the examples, programming language keywords, etc. For example, `SELECT * FROM emp;`
- *Italic fixed-width font* is used for terms for which the user must substitute values in actual usage. For example, `DELETE FROM table_name;`
- A vertical pipe `|` denotes a choice between the terms on either side of the pipe. A vertical pipe is used to separate two or more alternative terms within square brackets (optional choices) or braces (one mandatory choice).
- Square brackets `[]` denote that one or none of the enclosed term(s) may be substituted. For example, `[ a | b ]`, means choose one of "a" or "b" or neither of the two.
- Braces `{ }` denote that exactly one of the enclosed alternatives must be specified. For example, `{ a | b }`, means exactly one of "a" or "b" must be specified.
- Ellipses `...` denote that the proceeding term may be repeated. For example, `[ a | b ] ...` means that you may have the sequence, "b a a b a".

## 2 EDB Ark - Overview

EDB Ark simplifies the process of provisioning robust Postgres deployments, while taking advantage of the benefits of cloud computing. When used with Advanced Server, EDB Ark also provides a platform with compatibility with the Oracle database, offering dramatic cost savings and competitive advantages.

A cloud is a collection of virtual machines; each virtual machine runs a separate copy of an operating system and an installation of Postgres (see Figure 2.1).



*Figure 2.1 - Using EDB Ark in a Private Cloud.*

You can specify different combinations of CPU speed, RAM, and disk space to suit your needs when provisioning an EDB Ark cluster. EDB Ark makes it easy to scale up to a more capable cluster, or scale down as your requirements change.

EDB Ark solves common challenges faced by businesses that need more agility, velocity, and thrift in deploying and using relational, ACID-compliant databases:

- **Develop / Test / Deploy.** Quickly create and delete Postgres databases with standard configurations to support software development and testing activities, then deploy applications to the database or cluster – all at a pace dramatically quicker than physical provisioning.
- **Workload Portability.** The same Postgres database trusted in the datacenter also runs in a cloud cluster with scalability and high-availability.
- **Enterprise-class power.** Postgres was designed to solve critical business challenges requiring reliable, high-performance, ACID-compliant database processing. As the only open source database meeting those requirements, it offers an extremely attractive alternative to more expensive options.

EDB Ark includes the following functionality:

- **Scale computing resources up and out.** EDB Ark automatically scales up storage capacity, and provides a simple button to scale your server class up when data processing loads and usage characteristics require a change in the underlying virtual machine resources.
- **Automatic Connection Pooling and Load Balancing.** EDB Ark maintains a cluster of database nodes, automatically scaling out replicas based on increasing user demand. The integrated connection pooling manager increases database read performance by distributing requests across all cluster members.
- **Self-Healing Failover.** EDB Ark automatically replaces downed database nodes, preserving the continuity and performance of the cluster. Users can choose to replace the master with a new master (preserving all committed transactions) or with a promoted replica (for faster recovery time).
- **Automatic Online backup.** EDB Ark uses user-directed rotating backups to protect your data from loss due to mishaps.
- **Supports data encryption.** EDB Ark offers SSL data encryption that protects data at rest, and is transparent to connecting clients.
- **Cost-saving Compatibility with the Oracle Database.** Using a database that is compatible with Oracle is a reliable, fast and cost-effective way to support Oracle applications in public and private clouds.
- **Web-based interface.** EDB Ark provides easy to use point-and-click cluster lifecycle management from start to finish from your favorite web browser.

- **Database Cloning.** EDB Ark allows you to quickly and easily create developer 'sandboxes' based on real production data, saving System Administrators setup, configuration and data load time.
- **Professional Postgres Support.** EnterpriseDB provides support from Postgres experts who work with top Postgres open source developers.
- **JSON Compatible API Support.** EDB Ark supports a JSON-compatible API.

## 2.1 Architecture Overview

The Ark console is designed to help you easily create and manage high-availability database clusters from a web browser.

Traditionally, the expression *cluster* refers to a single instance of Postgres managing multiple databases; an EDB Ark *database server cluster* is a collection of high-availability Postgres server instances that reside in a cloud or on a traditional network.

When you create a new cluster (a group of replicated database servers), EDB Ark initializes one or more Postgres instances (virtual machines) according to your specifications. EDB Ark uses Postgres streaming replication to synchronize replicas in the cluster, and pgbpool-II to implement load balancing and connection pooling among all active instances. Figure 2.2 provides a general overview of the EDB Ark architecture.

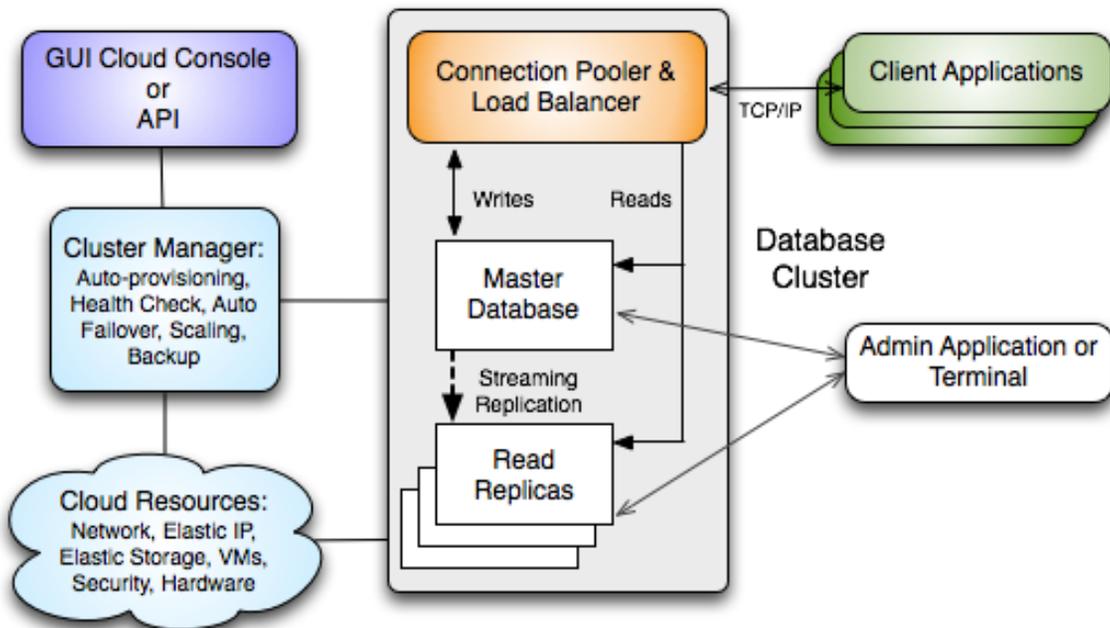
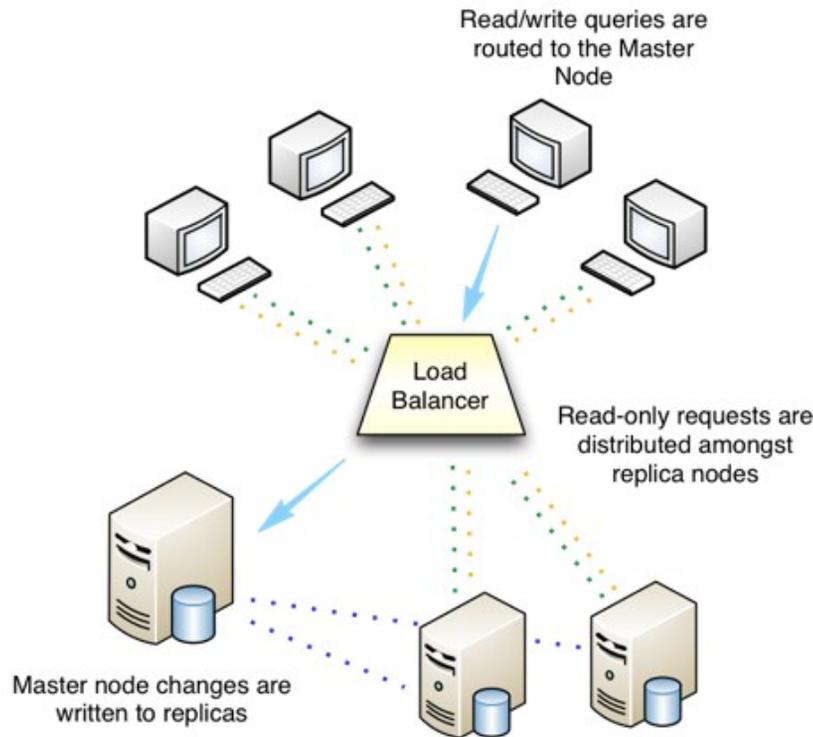


Figure 2.2 - An overview of the EDB Ark architecture.

The master node of the cluster contains a host operating system with a running instance of Postgres, along with the load balancer. Database modifications are automatically routed to the master node; any modifications to the master node are subsequently propagated to each replica using Postgres streaming replication.

EDB Ark installs Postgres on each replica node in a read-only hot-standby role that automatically duplicates all data found on the master node, and all changes made to that data. In hot-standby mode, the data is available to service user queries providing read

scalability to the cluster (see Figure 2.3). In addition, any schema changes made to the master are also replicated to the replica nodes, making development and deployment of application changes easy and seamless without interruption to normal operations.



*Figure 2.3 - EDB Ark performs automatic load balancing.*

Replicas provide balanced user support as needed - if any instance in the cluster goes offline, the cluster's load is re-balanced among the remaining servers while the instance is automatically replaced.

When used in the default healing configuration, in the event of a failure of the master node, an existing replica is used to replace the failed master node. While the replica nodes are standing by, they are read-only resources, load balancing client queries without a risk of compromising data integrity.

EDB Ark automatically archives data at regular intervals; you can specify a convenient backup window and how many backups to retain when creating a database cluster. EDB Ark also offers backup on demand - simply click the `Backup` icon to save a copy of the instance. Automatic backups are retained according to your specifications; on-demand backups are retained until you delete them. Each backup is a complete copy of the cluster; you can use a backup to restore a cluster.

EDB Ark makes it easy to scale a database cluster:

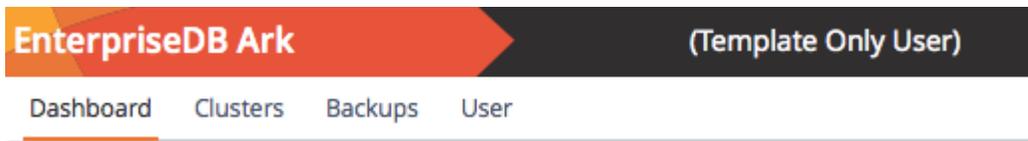
- To increase read performance, you can add read replicas to the cluster (manually or automatically).
- To handle expanding data requirements you can increase the amount of storage available (manually or automatically).
- To increase the RAM or CPU processing power of the cluster's underlying virtual machine, you can manually scale a cluster into a more appropriate server class.

## 2.2 Using Ark as a Template Only User

Some features of the Ark console are not available to a *Template Only* user. A Template Only user:

- must specify a template when deploying, scaling, or restoring a cluster.
- is restricted to the scaling policies defined in the template.
- cannot modify a manually-defined cluster created by another user.
- can only scale clusters to a server class that exists in a template that is available to the current tenant.
- may only delete backups of template created clusters.
- may not delete last backup of a template created cluster if the cluster had been deleted.

If you are a Template Only user, the Ark console displays a note in the upper-left header when you log in (see Figure 2.4).



*Figure 2.4 - Creating a new Ark cluster.*

For Template Only users, the Ark dialogs used to create a cluster, clone a cluster, or to restore a backup offer a subset of the fields presented on the dialogs viewed by a user that is not a Template Only user.

For detailed information about using a template to:

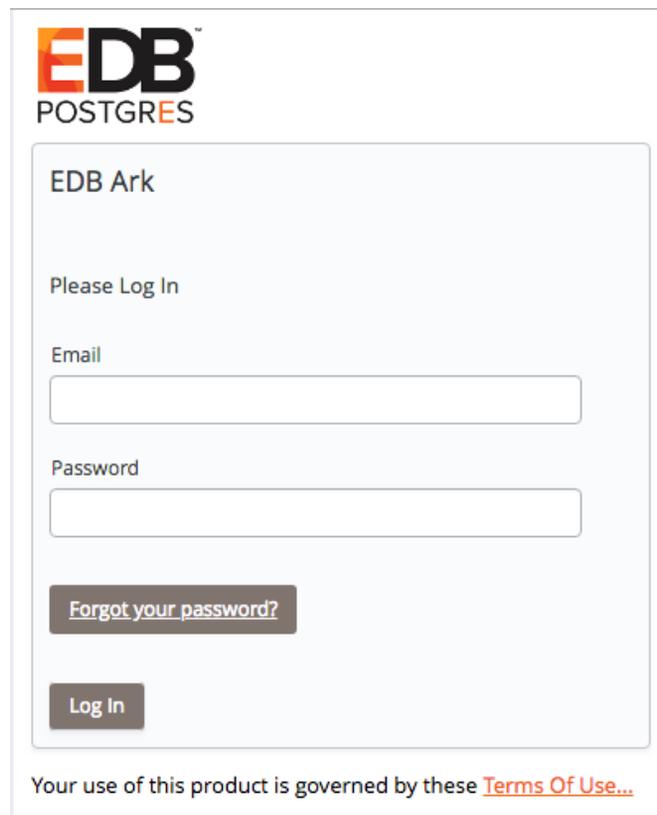
- create a cluster, see Section [5.1.1](#).
- restore from backup, see Section [7.3.1](#).
- clone a cluster, see Section [5.2.1](#).

Please note: a user that is not restricted to template usage may override template policy when modifying a cluster created with a template.

## 3 Accessing the Ark Console

If your Ark console resides on an Amazon host, the console configuration will determine the user registration process. An administrative user can enable or disable self-registration. If you are an administrative user and need information about enabling or disabling self-registration, please refer to the EDB Ark Administrative User's Guide. If you are a non-administrative user connecting to the Ark console on an Amazon host with self-registration enabled, see Section 3.1.

When you navigate to the URL of an installed Ark console, the console will display a login dialog (see Figure 3.1).



EDB  
POSTGRES

EDB Ark

Please Log In

Email

Password

[Forgot your password?](#)

[Log In](#)

Your use of this product is governed by these [Terms Of Use...](#)

*Figure 3.1 - The Login dialog.*

Enter your user name in the `Email` field, and the associated password in the `Password` field, and click `Log In` to connect to the Ark console. The Ark console opens as shown in Figure 3.75.

The screenshot displays the EDB Ark console interface. At the top, there is a navigation bar with the 'EnterpriseDB Ark' logo, user information '(Template Only User)', 'acctg', 'Consoles: acctg', 'Role: edb-ark', and a 'Logout' button. Below the navigation bar are tabs for 'Dashboard', 'Clusters', 'Backups', and 'User'. The main content area is divided into several sections:

- Getting Started:** A section with the text 'To begin using EDB Ark, you will want to launch a database cluster.' and a prominent orange 'Launch DB Cluster' button.
- Resources:** A section titled 'You are using the following resources:' with three buttons showing '0 Instances', '0 Snapshots', and '0 Volumes'.
- Hot Topics:** A section titled 'EDB Postgres Advanced Server and PostgreSQL version 11 are now available.' with a list of links including 'EDB Postgres Advanced Server Guide v11' and 'PostgreSQL Core Documentation v11'. Below this is an 'Additional Resources' section with links to 'Join the Postgres Rocks Community', 'EnterpriseDB Blogs', 'EnterpriseDB Product Documentation', 'EnterpriseDB Videos', and 'EnterpriseDB White Papers'.
- Service Status:** A section containing three status messages:
  - 'Service is operating normally: [RESOLVED] Increased API and Launch Error Rates' with a date of 'Tue, 20 Nov 2018 06:20:02 PST' and a description of elevated error rates.
  - 'Informational message: Increased API and Launch Error Rates' with a date of 'Tue, 20 Nov 2018 05:50:24 PST' and a description of an investigation.
  - 'Service is operating normally: [RESOLVED] Network Connectivity' with a date of 'Wed, 17 Oct 2018 13:06:00 PDT'.
- EDB Ark V3.3 Tutorials and Documentation:** A section with a grid of links to various guides:
  - EDB Ark Release Notes (PDF)
  - EDB Ark Getting Started Guide (PDF)
  - EDB Ark Administrative User Guide (PDF)
  - EDB Ark API User Guide (PDF)
  - Advanced Server Guide
  - PostgreSQL Documentation
  - Database Compatibility for Oracle(R) Developers Guide
  - Free Training: EDB Ark QuickStart

*Figure 3.2 - The Ark console.*

### 3.1 Using Self-Registration on an Amazon Hosted Console

If self-registration is enabled, on your first visit to the Ark console, you should create an Amazon role and register an Ark console user.

As part of the registration process for the Ark console, you must create an Amazon IAM role and perform a *handshake* between the Ark console and the Amazon management console. The handshake associates the `external ID` provided by the Ark console with the Amazon role, and the Role Arn provided by the Amazon console with the Ark user.

Please note that each time you refresh the `ArkNewUser` dialog, the `external ID` displayed on the registration dialog will change; you must have access to both the Ark console and the Amazon management console while registering an Ark user.

To start the registration process, connect to the Amazon management console, and navigate to the `Identity and Access Management` dashboard (see Figure 3.3).

The screenshot displays the Amazon IAM Dashboard. At the top, it says "Welcome to Identity and Access Management". Below this, there is a section for "IAM users sign-in link" with the URL <https://clouddev-dev.signin.aws.amazon.com/console> and links for "Customize" and "Copy Link".

The "IAM Resources" section shows the following counts:

- Users: 28
- Roles: 53
- Groups: 4
- Identity Providers: 0
- Customer Managed Policies: 5

The "Security Status" section shows a progress bar indicating "3 out of 5 complete". Below the progress bar is a list of security tasks:

- Activate MFA on your root account (Warning icon)
- Create individual IAM users (Checkmark icon)
- Use groups to assign permissions (Checkmark icon)
- Apply an IAM password policy (Checkmark icon)
- Rotate your access keys (Warning icon)

Figure 3.3 - The Amazon IAM Dashboard.

Navigate to the `Roles` dashboard, and click the `Create New Role` button.

## Set Role Name

Enter a role name. You cannot edit the role name after the role is created.

**Role Name**

Maximum 64 characters. Use alphanumeric and '+=, @-\_' characters

*Figure 3.4 - Provide a role name.*

When the `Set Role Name` dialog opens (shown in Figure 3.4), specify a name for the new role and click `Next Step` to specify a role type.

## Select Role Type

**AWS Service Roles**

- Amazon EC2**  
Allows EC2 instances to call AWS services on your behalf.
- AWS Directory Service**  
Allows AWS Directory Service to manage access for existing directory users and groups to AWS services.
- AWS Lambda**  
Allows Lambda Function to call AWS services on your behalf.
- Amazon Redshift**  
Allows Amazon Redshift Clusters to call AWS services on your behalf
- Amazon API Gateway**  
Allows API Gateway to call AWS resources on your behalf.

**Role for Cross-Account Access**

**Role for Identity Provider Access**

*Figure 3.5 - Specify that the role allows EC2 instances to call AWS services.*

On the `Select Role Type` dialog, select the `AWS Service Roles` radio button (shown in Figure 3.5), and then the `Select` button to the right of `Amazon EC2` to continue to the `Attach Policy` dialog.

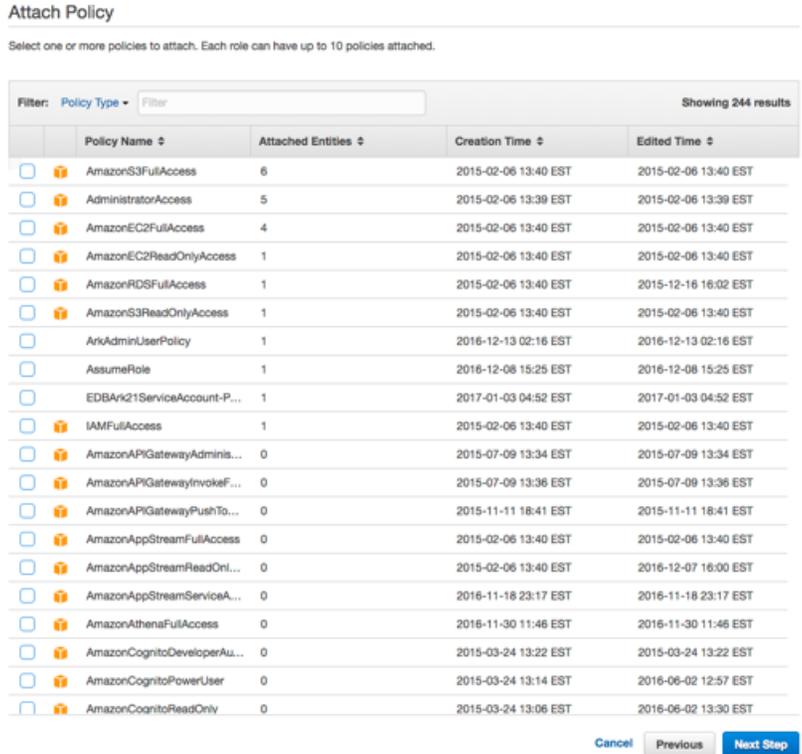


Figure 3.6 – The Attach Policy dialog.

When the `Attach Policy` dialog (shown in Figure 3.6) opens, do not specify a policy; instead, click `Next Step` to continue to the `Review` dialog.

## Review

Review the following role information. To edit the role, click an edit link, or click **Create Role** to finish.

<b>Role Name</b>	acctg-clerk	<a href="#">Edit Role Name</a>
<b>Role ARN</b>	arn:aws:iam::325753300792:role/acctg-clerk	
<b>Trusted Entities</b>	The identity provider(s) ec2.amazonaws.com	
<b>Policies</b>		<a href="#">Change Policies</a>

Figure 3.7 - Review the role information.

When the `Review` dialog opens (as shown in Figure 3.7), review the information displayed, and then click `Create Role` to instruct the AWS management console to create the described role.

<input type="checkbox"/>	Role Name ↕	Creation Time ↕
<input type="checkbox"/>	acctg-admin	2017-01-05 16:23 EST
<input type="checkbox"/>	acctg-clerk	2017-01-11 01:22 EST

Figure 3.8 - The new role is displayed on the Roles page.

The role will be displayed in the role list on the Amazon IAM `Roles` page (see Figure 3.8). The `Summary` tab will display a `Role ARN`, but the ARN will not be enabled until the security policy and trust policy are updated.

After completing the `Create Role` wizard, you must modify the inline policy and trust relationship (defined by the security policy) to allow Ark to use the role. Highlight the role name; then navigate to the `Permissions` tab and open the `Inline Policies` menu. Select `click here` to add a new policy (see Figure 3.9).

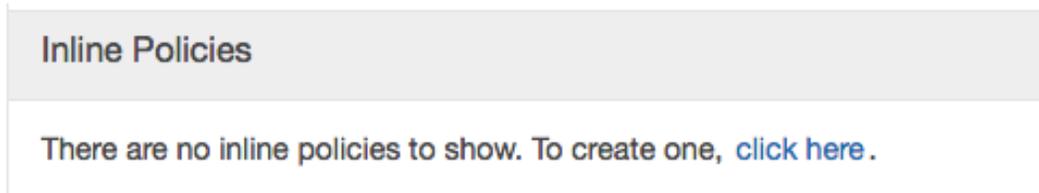


Figure 3.9 - The Inline Policies menu.

When the `Set Permissions` dialog opens, select the `Custom Policy` radio button, and then click the `Select` button (see Figure 3.10).

### Set Permissions

Select a policy template, generate a policy, or create a custom policy. A policy is a document that formally states one or more permissions. You can edit the policy on the following screen, or at a later time using the user, group, or role detail pages.

Figure 3.10 - Add a Custom Policy.

## Review Policy

Customize permissions by editing the following policy document. For more information about the access policy language, see [Overview of Policies](#) in the Using IAM guide. To test the effects of this policy before applying your changes, use the [IAM Policy Simulator](#).

### Policy Name

### Policy Document

```

1- {
2-   "Version": "2012-10-17",
3-   "Statement": [ {
4-     "Action": [
5-       "ec2:AllocateAddress",
6-       "ec2:AssignPrivateIpAddresses",
7-       "ec2:Associate*",
8-       "ec2:Attach*",
9-       "ec2:AuthorizeSecurityGroup*",
10-      "ec2:Copy*",
11-      "ec2:Create*",
12-      "ec2>DeleteInternetGateway",
13-      "ec2>DeleteNetworkAcl",
14-      "ec2>DeleteNetworkAclEntry",
15-      "ec2>DeleteNetworkInterface",
16-      "ec2>DeletePlacementGroup",
17-      "ec2>DeleteRoute",
18-      "ec2>DeleteRouteTable",
19-      "ec2>DeleteSecurityGroup",
20-      "ec2>DeleteSnapshot",
21-      "ec2>DeleteSubnet",
22-      "ec2>DeleteTags",
23-      "ec2>DeleteVolume",
24-      "ec2>DeleteVpc",
25-      "ec2>DeleteKeypair",
26-      "ec2:Describe*",
27-      "ec2:Detach*",
28-      "ec2:DisassociateAddress",
29-      "ec2:DisassociateRouteTable",
30-      "ec2:EnableVolumeIO",
31-      "ec2:GetConsoleOutput",
32-      "ec2:ModifyImageAttribute",
33-      "ec2:ModifyInstanceAttribute"

```

 Use autoforamtting for policy editing




Figure 3.11 - Provide the policy name and contents.

Use the fields on the `Set Permissions` dialog (Figure 3.11) to define the security policy:

- Provide a name for the security policy in the `PolicyName` field.
- Copy the security policy text into the `PolicyDocument` field. The security policy required by Ark is available in [Section 15, AWS Resources](#).

After providing security policy information, click `Apply Policy` to return to the Role information page. Then, select the `Edit Trust Relationship` button (located in the `Trust Relationships` section) to display the `Policy Document` (see Figure 3.12).

## Edit Trust Relationship

You can customize trust relationships by editing the following access control policy document.

### Policy Document

```

1- {
2-   "Version": "2012-10-17",
3-   "Statement": [
4-     {
5-       "Sid": "",
6-       "Effect": "Allow",
7-       "Principal": {
8-         "Service": "ec2.amazonaws.com"
9-       },
10-      "Action": "sts:AssumeRole"
11-     },
12-     {
13-       "Sid": "",
14-       "Effect": "Allow",
15-       "Principal": {
16-         "AWS": "arn:aws:iam::747919436152:root"
17-       },
18-       "Action": "sts:AssumeRole",
19-       "Condition": {
20-         "StringEquals": {
21-           "sts:ExternalId": "EDB-PPCD-CONSOLE"
22-         }
23-       }
24-     }
25-   ]
26- }

```

*Figure 3.12 - The Policy Document.*

Replace the displayed content of the policy document with the content of the file available in Section [15, AWS Resources](#).

EDB-PPCD-CONSOLE is a placeholder within the trust policy. You must replace the placeholder with the External ID provided on the Step 2 tab of the Ark console New User Registration dialog.

To retrieve the External ID, open another browser window and navigate to the Log In page of your Ark console. Click the Register button to open the New User Registration dialog (shown in Figure 3.13).

The image shows a 'New User Registration' dialog box. It has a title bar with the text 'New User Registration' and a close button (X). Below the title bar, there are two tabs: 'Step 1' and 'Step 2'. The 'Step 1' tab is selected and underlined. Underneath the tabs, the text 'User Details' is displayed. The form contains the following fields:

- First Name: A text input field.
- Last Name: A text input field.
- Password: A text input field.
- Verify Password: A text input field.
- Email: A text input field.
- Cloud Provider: A dropdown menu with 'amazon zon EC2' selected.
- Company Name: A text input field.

At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Next'.

*Figure 3.13 - The New User Registration dialog.*

Enter user information in the `User Details` box located on the `Step 1` tab:

- Enter your first and last names in the `First Name` and `Last Name` fields.
- Enter a password that will be associated with the user account, and confirm the password in the `Password` and `Verify Password` fields.
- Provide an email address in the `Email` field; please note that the email address is used as the `Login` identity for the user.
- Use the drop-down listbox in the `Cloud Provider` field to select the host on which the cloud will reside.
- Enter the name of the company with which you are associated in the `Company Name` field.

When you've completed `Step 1`, click `Next` to access the `Step 2` tab.

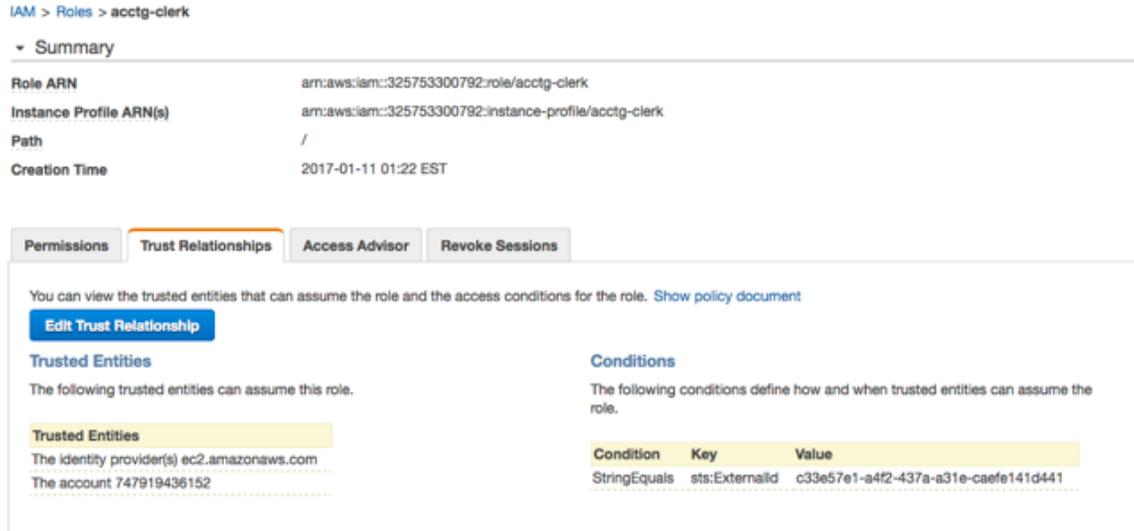


Figure 3.14 - The Summary tab of the Role detail panel.

The Step 2 tab of the New User Registration dialog will display a random External ID number. Copy the External ID from the Step 2 dialog into the trust policy, replacing EDB-PPCD-CONSOLE. Please note that you must enclose the External ID in double-quotes (""). Click the Update Trust Policy button to save your edits and exit the dialog.

Your Amazon IAM role ARN is displayed on the IAM Roles detail panel of the Amazon management console. Highlight a role name to display the assigned value on the Summary page. (as shown in Figure 3.14).



Figure 3.15 - Registering a user on an Amazon EC2 cloud.

Enter your Amazon IAM role ARN in the Role Arn field on the Step 2 dialog, and click Finish to complete the registration (see Figure 3.15). Select Cancel to exit without completing the registration.

After completing the registration, you can use the `Login/Register` dialog (shown in Figure 3.16) to access the Ark console.

EDB<sup>™</sup>  
POSTGRES

EDB Ark

Please Log In

Email

Password

[Forgot your password?](#)

Your use of this product is governed by these [Terms Of Use...](#)

*Figure 3.16 - The Login/Register dialog.*

Enter the registered email address in the `Username` field, and the associated password in the `Password` field, and click `Log In` to connect to the Ark console.

## 4 Using the Ark Console

The Ark console has four browser tabs that help you to manage clusters that reside in an AWS or Azure cloud:

- The `Dashboard` tab provides an overview of the current resources in use, a quick-start `Launch DB Cluster` button, and (optionally), links to documentation and tutorials.
- The `Clusters` tab provides a management and information resources for your clusters.
- The `Backups` tab provides a list of the existing snapshots of your Ark clusters and buttons that allow you to create or delete a snapshot.
- The `User` tab provides a graphical management interface that you can use to review and manage your user account information.

Please note that some features of the Ark console are not available to a `Template Only` user.

## 4.1 The Dashboard Tab

The `Dashboard` tab (shown in Figure 4.1) provides an overview of the EDB Ark service status, resources, useful information links and a quick-start `Launch DB Cluster` button.

The screenshot shows the EDB Ark Dashboard interface. At the top, there is a navigation bar with the EDB Ark logo, user information (Template Only User, acctg), console selection (acctg), role (edb-ark), and a Logout button. Below the navigation bar, there are several panels:

- Getting Started:** A panel with a "Launch DB Cluster" button and instructions to begin using EDB Ark.
- Resources:** A panel showing "You are using the following resources:" with three buttons: "0 Instances", "0 Snapshots", and "0 Volumes".
- Hot Topics:** A panel with a heading "EDB Postgres Advanced Server and PostgreSQL version 11 are now available." and a list of links including "EDB Postgres Advanced Server Guide v11" and "PostgreSQL Core Documentation v11".
- Service Status:** A panel with a heading "Service Status" and several status messages, including "[RESOLVED] Increased API and Launch Error Rates" and "[RESOLVED] Network Connectivity".
- EDB Ark V3.3 Tutorials and Documentation:** A section with a grid of links to various guides and documentation, such as "EDB Ark Release Notes (PDF)", "EDB Ark Getting Started Guide (PDF)", "EDB Ark Administrative User Guide (PDF)", "EDB Ark API User Guide (PDF)", "Advanced Server Guide", "PostgreSQL Documentation", "Database Compatibility for Oracle(R) Developers Guide", and "Free Training: EDB Ark QuickStart".

Figure 4.1 - The Dashboard tab.

To launch a cluster from the `Dashboard` tab, use the `Tenant` drop-down listbox to select the tenant in which the cluster will be created. Then, use the `Launch DB Cluster` button located in the `Getting Started` panel to open the `Create New Cluster` dialog and define the cluster attributes. For more information about defining a cluster, see Section 5.

The `Resources` panel contains an overview of the activity shown on the other tabs of the Ark console; click a link to navigate to the listed resource. For example, click the `Events` link to navigate to the `Clusters` tab to review the event logs.

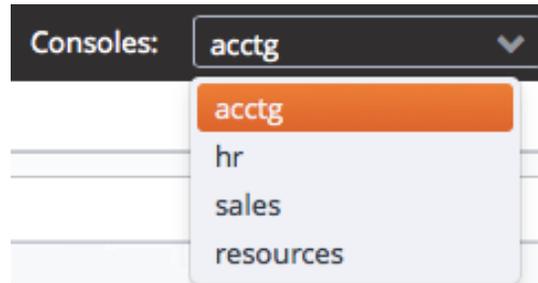
The `Hot Topics` panel provides a link to the EDB Ark website.

Use the links in the `EDB Ark Tutorials and Documentation` section to access EDB Ark and Postgres documentation.

### 4.1.1 Using the Console Switcher Feature

The console switcher provides convenient access to a list of user-defined console names and their associated addresses. When you select a name from the `Consoles` drop-down

listbox (see Figure 4.2), the Ark console opens a browser tab and navigates to the address associated with the shortcut name.



*Figure 4.2 – The Consoles drop-down.*

An Ark administrative user can use management features located on the `Admin` tab of the administrative console to add consoles to the list, or remove consoles from the list. For more information about populating the console switcher, please see the *EDB Ark Administrative User's Guide*.

## 4.2 The Clusters Tab

Use the `Clusters` tab (shown in Figure 4.3) to create, monitor and manage active clusters that reside in the cluster.

The screenshot displays the EnterpriseDB Ark Clusters tab. At the top, the user is identified as 'Template Only User' with the role 'edb-ark'. The interface shows a list of clusters with columns for Name, Pending, Data space %, Load, VM, HA, DB, and UP. The 'acctg' cluster is selected, and its details are shown in a large panel. The details panel includes a table of instances with columns for ADDRESS, AZ, SUBNET, LB PORT, DB PORT, CXN, VM, HA, DB, and UP. The details panel also includes sections for Cluster information, Administrative Settings, Auto Scale Options, and Backup Settings.

Name	Pending	Data space %	Load	VM	HA	DB	UP
sales		2%	0.34	✓	✓	✓	✓
acctg		4%	0.29	✓	✓	✓	✓

ADDRESS	AZ	SUBNET	LB PORT	DB PORT	CXN	VM	HA	DB	UP
ec2-34-195-197-155.cc	us-east-1f	subnet-0da45bc0d6f238ece	9999	5444	5	✓	✓	✓	✓
ec2-34-230-41-242.r	us-east-1a	subnet-033a26c6cd36d935f		5444	3	✓	✓	✓	✓
ec2-3-80-90-191.cor	us-east-1b	subnet-03b154a8801ae0e7d		5444	3	✓	✓	✓	✓

Figure 4.3 - The Clusters tab.

Indicators in the columns to the right of a cluster name display the current health of the cluster. Click on a column name to sort the contents of the column; click a second time to reverse the sort-order.

- The `VM` column displays the state of the virtual machine on which the cluster resides.
- The `HA` column displays the state of the high-availability cluster.
- The `DB` column displays the state of the database server.

- The `UP` column displays the current status of the packages installed on the cluster. Periodically, the cluster manager performs a check to see if the packages are up to date.

Status indicators provide quick visual feedback about each feature:

Indicator	Description
A green checkmark	indicates that an object is healthy
A yellow alert symbol	calls attention to an object that requires processing
A red error symbol	signifies that an object is not available
A question mark	indicates that the state of the resource is unknown

Use the icons along the left side of the `Clusters` tab to create new clusters or manage existing clusters:



**New Cluster** Use the `Add Cluster` icon to create a new Postgres cluster. For more information, see [Section 5.1](#).



**Scale Up** Select the `Scale Up` icon to manually add one or more replicas to the current cluster, or add additional storage to the current cluster servers. For information about manually adding replica servers or storage, see [Section 9](#).



**Scale Down** Use the `Scale Down` icon to remove one or more specified replicas from the cluster. For more information about using the `Scale Down` icon, see [Section 9.2](#).



**Backup** Select the `Backup` icon to take a backup of the highlighted cluster (a single backup of the cluster data, and a backup of the cluster configuration files). For more information, see [Section 7](#).



**Clone** Select the `Clone` icon to copy the master node of the selected database into a *clone* of the original master node. Use this feature to create a developer sandbox that is an exact duplicate of a working server; for more information about creating a clone, see [Section 5.2](#).

When you clone a database, only the master node is recreated in the new cluster. For information about manually adding replica servers to the new cluster, see [Section 9](#), [Manual Scaling](#).



Upgrade

You can use the Upgrade icon to open a dialog that allows you to perform a yum update (keeping the same server version) or perform an upgrade to a later server version. After performing an update, the cluster nodes will be rebooted (initiating any kernel updates required). Please note that a software update can take some time to complete.

For information about configuring your cluster for automatic updates, see Section [13.5](#).



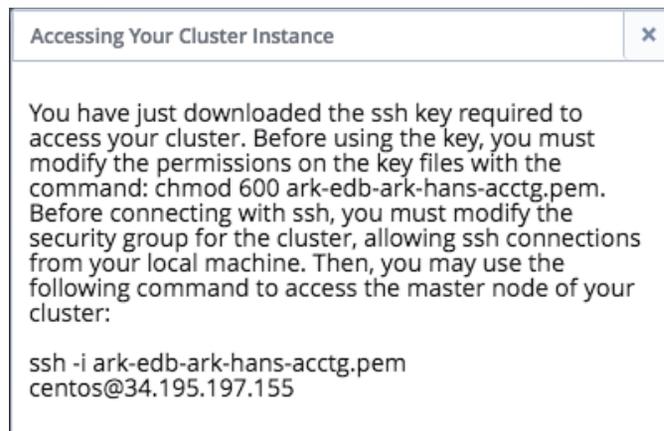
Scale Machine Type

Use the Scale Machine Type icon to change the size of the virtual machine for the selected cluster. EDB Ark will copy the cluster into a new cluster of a different server class (i.e. RAM and CPU), and optionally re-assign the IP address of the existing cluster to the new cluster. For more information about using the Scale Machine Type dialog, see Section [9](#).



Download SSH Key

Use the Download SSH Key icon to download the SSH key associated with the selected cluster. Each cluster has a unique key that you can use to access nodes in that cluster. When you download a key, a popup will inform you of the steps required to connect to your cluster with SSH (see Figure 4.4).



*Figure 4.4 – Accessing Your Cluster Instance.*

The popup displays the tenant name, the cluster name, the name that you should use when connecting to the cluster, and the IP address to which you should connect. For more information about using SSH to connect to a cluster, see Section [13.1.1](#).

Please note: before downloading the SSH key, you should disable pop-up blocker software from restricting pop-ups from the URL/s used by the Ark console or Ark clusters.



**Administrative Settings** Use the `Cluster Administrative Settings` icon to access a popup dialog that allows you to view or modify the ownership and notification email address of the currently selected cluster. For more information about the `Administrative Settings` dialog, see Section [5.3](#).



**Delete** Use the `Delete Cluster` icon to delete the currently selected cluster. A popup dialog will ask you to confirm your decision to terminate a cluster; once terminated, a cluster may only be restored from a backup.

By default, the box next to `Release elastic IP address` is checked. Deselect this option if you wish to retain the IP address for re-use with other clusters. If you release the IP address, it will be made available for use by other clusters.

When you terminate an active cluster, backups are not deleted. Backups (including user data) are retained until they are selected and deleted from the `Backups` tab.

The panels located at the bottom of the `Clusters` tab provide easy access to helpful statistical usage and activity information about the currently selected cluster. Three navigation bars control the display; click a panel name on the navigation bar to access one of the following panels:

- Select the `Details` bar to view information about the state of the selected cluster.
- Select the `Monitoring` bar to view usage statistics for the selected cluster.
- Select the `Events` bar to review event logs describing activities on the selected cluster.

## 4.2.1 The Details Panel

Click the `Details` navigation bar to open the `Details` panel (shown in Figure 4.5).

The screenshot shows the 'Details' panel for a cluster named 'acctg'. The left pane contains the following information:

- Cluster: acctg
- Creation Date: Tue Dec 11 14:57:56 GMT-05:00 2018
- DB Username: enterprisedb
- Owner: scott.ward@enterprisedb.com
- Email: scott.ward@enterprisedb.com
- Size: 1gb
- Region: us-east-1
- VPC ID: vpc-9720b2f2
- Server Class: t2.micro
- Engine Version: EDB Postgres Advanced Server 11 64bit on CentOS 6/7, RHEL 7
- Template used at creation: acctg\_template
- OS/SW update on creation: false
- Monitor Load Balancer Health
- Monitor Database Health
- Cluster healing mode:
  - Replace failed master with a new master
  - Replace failed master with existing replica

Below this is the 'Auto Scale Options' section with two sliders:

- % of Storage Size used: 65
- # of Server Connections: 95

The right pane contains a table of instance details:

ADDRESS	AZ	SUBNET	LB PORT	DB PORT	CXN	VM	HA	DB	UP
ec2-34-195-...	us-east-1f	subnet-0da45bc0d6f238ece	9999	5444	5	✓	✓	✓	✓
ec2-34-23...	us-east-1a	subnet-033a26c6cd36d935f		5444	3	✓	✓	✓	✓
ec2-3-80-...	us-east-1b	subnet-03b154a8801ae0e7d		5444	3	✓	✓	✓	✓

At the bottom right, there are 'Backup Settings (GMT-05:00)' with a 'Backup Window' of '12:00am - 2:00am' and 'Backup Retention' of '1'. There is also a checkbox for 'Continuous Archiving (Point-in-Time Recovery)' which is currently unchecked.

Figure 4.5 - The Details panel on the Clusters tab.

The left pane of the `Details` panel displays information about the currently selected cluster:

- The name of the cluster
- The date and time that the cluster was created
- The name of the database superuser for the cluster
- The name of the cluster owner
- The email address to which notifications about the cluster will be sent
- The cluster size
- If the cluster is encrypted
- If applicable, the IOPS value for the cluster
- The region in which the cluster resides
- The virtual network or VPC ID in which the cluster resides
- The cluster's hardware type or Server Class
- The engine type and version that resides on the server
- If a template was used, the template name

- If the cluster is configured to update when provisioned

You can use controls on the `Details` panel to specify:

- If load balancer health should be monitored
- If database health should be monitored
- Failover preferences for the cluster
- Auto-scaling thresholds for the cluster
- Backup preferences for the cluster
- If continuous archiving should be enabled for the cluster

When you modify the settings on the `Details` panel, EDB Ark displays a `New value saved` notice, confirming that the change has been saved.

Please note: If a template was used to specify the configuration details for the cluster, the template may prohibit access to auto-scaling or manual scaling functionality.

### ***Monitoring Load Balancer Health***

By default, EDB Ark monitors the health of the load balancer to ensure that service is not interrupted. If the load balancer (pgpool) should fail while monitoring is enabled, PgPool will be automatically restarted. If the load balancer cannot be automatically restarted, EDB Ark will display a warning sign in the `DB` column next to the cluster name, and send a notification email to the cluster user.

Deselect the `Monitor Load Balancer Health` checkbox to indicate that you do not wish for load balancer health to be monitored and automatically restarted if an interruption in service is detected.

### ***Monitoring Database Health***

By default, the `Monitor Database Health` checkbox is checked, indicating that EDB Ark is monitoring the health of the database to ensure that service is not interrupted. If the state of the database server changes to any state other than running while `Monitor Database Health` is checked, Ark will attempt to restart the database.

If the database restart fails, Ark will restore the configuration files to their original settings and attempt a restart. If the server fails to restart after restoring the configuration, Ark will failover to a new instance.

Uncheck the `Monitor Database Health` checkbox to instruct Ark to not automatically restart the database if the database stops.

### ***Selecting a Cluster Healing Mode***

Use the `Cluster healing mode` radio buttons to specify the type of failover that should be employed:

- Select the `Replace failed master with a new master` radio button to specify that the cluster manager should create a new master to replace a failed master node.

When replacing a failed master node with a new master node, the data volumes from the failed instance are attached to the new master node, preserving data integrity, while the replicas continue serving client queries.

- Select the `Replace failed master with existing replica` radio button to specify that the cluster manager should promote a replica node to be the new master node for the cluster.

When replacing a failed master node with an existing replica, a replica node is marked for promotion to master node, while the other replica nodes are re-configured to replicate data from the new master node. Since replica nodes use asynchronous replication, any data that was committed to the old master node, but not pushed to the replica prior to the node failure will be lost.

Please note that replacing a failed master node with a new master node can take a bit longer than promoting a replica node to the role of master, but it does have the advantage of guaranteeing that no committed data will be lost. If recovery time for your cluster is more important than preserving any non-replicated transactions, then select `Replace failed master with existing replica` as the healing mode.

### ***Adjusting Auto-Scaling Thresholds***

Use the `Auto-Scaling Thresholds` controls on the `Details` panel to adjust the threshold at which EDB Ark automatically scales up cluster resources. For more information about using the controls, see Section [10.1](#), *Adjusting the Automatic Scaling Thresholds*.

### ***Modifying Backup Settings***

Use the fields in the `Backup Settings` box to change your backup preferences for the selected cluster:

- Use the `Backup Window` drop-down list box to select an optimal time to process cluster backups; specify a time when the number of clients accessing the database is minimal.
- Use the `Backup Retention` field to specify the number of backups that should be stored for the selected cluster.

- Select the checkbox next to `Continuous Archiving (Point-in-Time Recovery)` to enable point-in-time recovery for a cluster. When enabled, a base backup is automatically performed that can be used to restore to a specific point in time. All subsequent automatic scheduled backups will also support point-in-time recovery. Note that if you deselect this option, the cluster (and subsequent automatic backups) will be re-configured to not include support for point-in-time recovery.

When point-in-time recovery is enabled, the value specified in the `Backup Retention` field determines the duration of the point-in-time recovery backup window. For example, if you specify a value of 7, the backup window will be 7 calendar days long. When the backup retention threshold is reached, the oldest base backup is removed, as well as any WAL files required to perform a recovery with that backup.

### ***Reviewing Cluster Connection and Status Information***

The `DNSNAME` table (located on the right side of the `Details` panel) contains a status overview and connection information for the selected cluster. If you have created replicas, the secondary server nodes are listed below the master node in the tree control; expand the tree control to view the status of the replication nodes.

Status indicators on the `Clusters` tab provide quick visual feedback about the status of your cluster:

<b>Indicator</b>	<b>Description</b>
A green checkmark	indicates that an object is healthy
A yellow alert symbol	calls attention to an object that requires processing
A red error symbol	signifies that an object is not available
A question mark	indicates that the state of the resource is unknown

Use the drop-down tab in the upper-right corner of the `DNSNAME` pane to select the columns that will be displayed in the panel:

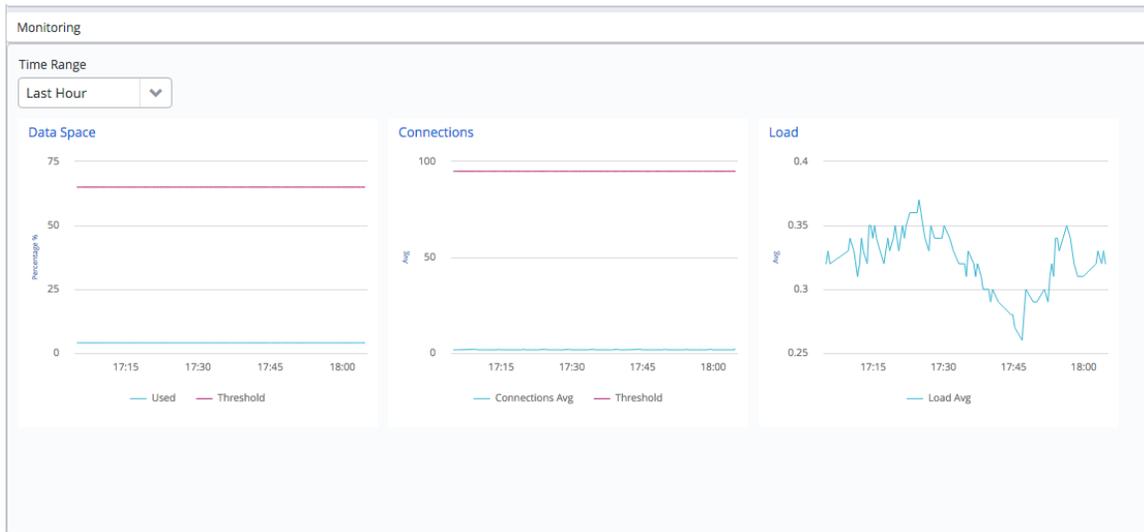
- The `AZ` column displays the `Availability Zone` in which the cluster resides.
- The `SUBNET` column displays the subnet ID on which the cluster resides.
- The `LBPORT` column displays the port number to which a client application should connect to utilize load balancing.
- The `DBPORT` column displays the default listener port for the Advanced Server or PostgreSQL server.
- The `CXN` column displays the current number of connections to the node.

- The `VM` column displays the state of the virtual machine on which the cluster resides.
- The `HA` column displays the state of the high-availability cluster.
- The `DB` column displays the state of the database server.
- The `UP` column displays the current status of the packages installed on the cluster. Periodically, the cluster manager performs a check to see if the packages are up to date. If an update becomes available, the `UP` column will display a yellow alert symbol if the update is non-critical, or a red error symbol if the update is a critical (security) alert.

If alerted to an out-of-date package, you can use the `Upgrade` icon to invoke a `yum update` to update the package on all of the nodes on your cluster.

## 4.2.2 The Monitoring Panel

The `Monitoring` panel displays graphs that allow you to review statistical usage information about the amount of storage and the CPU load for the selected cluster (see Figure 4.6).



*Figure 4.6 - The Monitoring panel displays usage information.*

Use the `Time Range` drop-down listbox to modify the time period that the charted information on the `Monitoring` panel spans.

The graphs on the `Monitoring` panel display resource usage information:

- The `Data Space` chart displays the amount of allocated data space used by the selected cluster. The red line denotes the threshold specified by the `Data Space Threshold` slider on the `Details` panel (the threshold at which the cluster will be scaled-up). The blue line indicates the amount of the data space that is currently in use.
- The `Connections` chart displays a graph of the number of connections to the cluster during the selected time range. The red line denotes the threshold specified by the `Connections` slider on the `Details` panel.
- The `Load` chart displays the processing load placed on the CPU by connecting clients. The value displayed is the actual load average as read from the program, `/proc/loadavg`. The chart shows the number of jobs in the run queue or waiting for disk I/O, averaged over 15 minute periods.

### 4.2.3 The Events Panel

The `Events` panel (shown in Figure 4.7) displays an event log containing a history of selected events for the connected user.

Events		
ID	TIME	MESSAGE
397	Tue Dec 11 16:12:01 GMT-05:00 2018	Backup of cluster acctg completed.
396	Tue Dec 11 16:11:56 GMT-05:00 2018	Saving snapshot snap-05cba7312a317d575 volume vol-057ef6de4322964fc ( 100% )
395	Tue Dec 11 16:11:51 GMT-05:00 2018	Saving snapshot snap-05cba7312a317d575 volume vol-057ef6de4322964fc ( 0% )
394	Tue Dec 11 16:11:46 GMT-05:00 2018	Saving snapshot snap-05cba7312a317d575 volume vol-057ef6de4322964fc ( 0% )
393	Tue Dec 11 16:11:45 GMT-05:00 2018	Saving snapshots of attached volumes
392	Tue Dec 11 16:11:45 GMT-05:00 2018	Backup in progress
391	Tue Dec 11 16:11:44 GMT-05:00 2018	Backup of cluster acctg started.
390	Tue Dec 11 15:58:41 GMT-05:00 2018	The OS/SW status on node ec2-3-80-90-191.compute-1.amazonaws.com of cluster acctg is now Warning
389	Tue Dec 11 15:58:41 GMT-05:00 2018	Database Server changed to state RUNNING on ec2-3-80-90-191.compute-1.amazonaws.com:
388	Tue Dec 11 15:58:31 GMT-05:00 2018	Deleting backup completed for: snap-06a57b2f7c511a6e1
387	Tue Dec 11 15:58:31 GMT-05:00 2018	Deleted snapshots for backup: snap-06a57b2f7c511a6e1
386	Tue Dec 11 15:58:31 GMT-05:00 2018	Deleting backup started for: snap-06a57b2f7c511a6e1
385	Tue Dec 11 15:58:31 GMT-05:00 2018	Addition of replica ec2-3-80-90-191.compute-1.amazonaws.com to cluster acctg completed.
384	Tue Dec 11 15:58:31 GMT-05:00 2018	Database server registered with PEM agent

*Figure 4.7 - The Events panel displays server activity.*

Highlight a cluster name to display only events for that cluster; if you do not select a cluster, the `Events` panel will display the collected events for the connected user.

- Click a column heading to sort the logged activity by the selected column; click again to reverse the sort order.
- Use a mouse to select multiple rows from the event log for copy and paste operations.

### 4.3 The Backups Tab

Use the `Backups` tab (shown in Figure 4.8) to manage cluster backups; the tab displays a list of the available backups.

Dashboard Clusters Backups User DBA Admin									
	ID	Cluster	Notes	Engine Version	Capacity	Started	Ended		
	snap-05cba7312a317d575	acctg		EDB Postgres Advanced Server 11 64bit on CentOS 6/7, RHEL 7	2 GB	Tue Dec 11 16:11:44 GMT-05:00 2018	Tue Dec 11 16:12:01 GMT-05:00 2018		
	snap-05dbe3d85ca2ac14b	payables	(PITR) Base backup: Tue Dec 11 15:27:58 GMT-05:00 2018	EDB Postgres Advanced Server 11 64bit on CentOS 6/7, RHEL 7	3 GB (encrypted)	Tue Dec 11 15:27:58 GMT-05:00 2018	Tue Dec 11 15:28:46 GMT-05:00 2018		
	snap-09a335a43254ebbc4	sales	(PITR) Base backup: Tue Dec 11 14:52:07 GMT-05:00 2018	EDB Postgres Advanced Server 11 64bit on CentOS 6/7, RHEL 7	5 GB	Tue Dec 11 14:52:07 GMT-05:00 2018	Tue Dec 11 14:53:26 GMT-05:00 2018		

Figure 4.8 - The Backups tab of the Ark console.

A backup captures and stores the status and condition of a cluster at a specific point-in-time. Click a column heading to sort the column contents; click again to reverse the sort order.

If the comment in the `NOTES` column for a specific cluster includes `PITR`, point in time recovery is enabled on the cluster. When point in time recovery is enabled, the backup can be used to restore your cluster to a state at any given time since the backup was taken.

Use the icons on the left side of the `Backups` tab to restore or delete backups:



**Recover Backup** Highlight a backup in the list, and click the `Recover Backup` icon to open a dialog that allows you to restore a cluster from the selected backup. Specify a name for the cluster, and click the `Recover` button to continue. A popup confirms that the cluster is being restored; close the popup and navigate to the `Clusters` tab to monitor the restoration process.



**Delete Backup** Highlight one or more backups in the list and click the `Delete Backup` icon to delete the selected backups. A popup will ask you to confirm that you wish to delete the selected backups before the backups are actually deleted.

## 4.4 The User Tab

Fields on the `User` tab (shown in Figure 4.9) allow you to view or modify information about the current user.

The screenshot shows the EnterpriseDB Ark console interface. At the top, there's a navigation bar with 'EnterpriseDB Ark' logo, '(Template Only User)', 'acctg', 'Consoles: acctg', 'Role: edb-ark-hans', and 'Logout'. Below the navigation bar, there are tabs for 'Dashboard', 'Clusters', 'Backups', and 'User'. The 'User' tab is active, showing settings for 'Alan James'. The settings include:
 

- Provider: aws-ec2
- Personal Details:
  - First Name: Alan
  - Last Name: James
  - Company Name: EnterpriseDB
  - Login Email ID: alan.james@enterprisedb.com
  - Notification Email: alan.james@enterprisedb.com
  - Role ARN: arn:aws:iam::325753300792:role/edb-ark-hans

 At the bottom, there are three buttons: 'Discard Changes', 'Apply Changes', and 'Change Password'.

*Figure 4.9 - The User tab of the Ark console.*

To change the `First Name`, `Last Name`, or `Company Name` of the registered user, modify the corresponding fields and click the `Apply Changes` button. A popup will confirm that the changes have been applied.

The `Notification Email` field on the `User` tab displays the default email address that will be used for cluster notifications unless an alternate address is provided. You can optionally:

- provide an alternate email address when a cluster is created (on the `Create a new Server Cluster` dialog).
- modify a cluster's notification email address on the `Administrative Settings` dialog.

To change the default notification email address, enter a new address in the `Notification Email` field, and click the `Apply Changes` button. A popup dialog will open, prompting you to enter your password to confirm the change of address. Enter your password, and click `Confirm` to modify the address, or click `Cancel` to exit the popup without applying the change.

If you elect to change the notification email address, EDB Ark will send a confirmation email to both the old notification address and the new notification address.

### 4.4.1 Updating a Password on Amazon AWS

If your Ark console is deployed on Amazon AWS, the `User` tab displays the Amazon Role ARN associated with your Ark user account, and provides an option that allows you to modify your password. To modify your password, click the `Change Password` button; the `Change Password` dialog opens as shown in Figure 4.10.

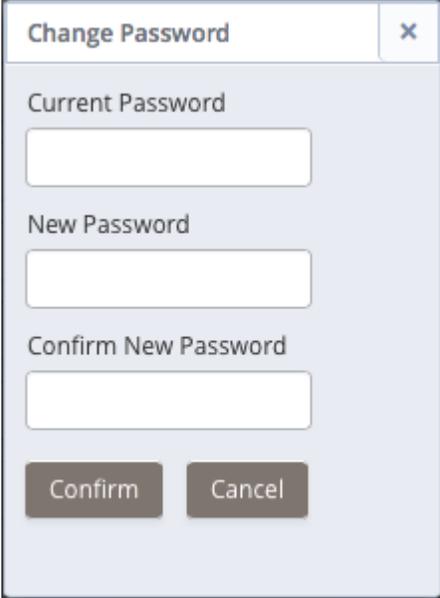


Figure 4.10 – The Change Password dialog.

To modify your password:

- Provide your current password in the `Current Password` field.
- Enter the new password in the `New Password` field.
- Confirm the new password in the `Confirm New Password` field.

Click the `Confirm` button to change the password to the new value; click `Cancel` to exit the dialog without modifying the password.

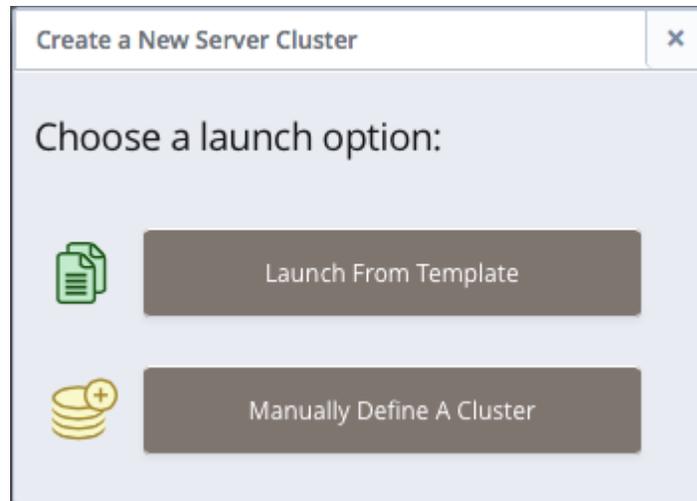
When you change your password, a popup will confirm that the password has been changed and Ark will send an email to the notification email address associated with the account.

## 5 Creating a Server Cluster

To create a server cluster, you can:

- Use the `Launch DB Cluster` button (located on the `Dashboard Tab`) to open the `Create a new Server Cluster` dialog and define a new cluster.
- Click the `New Server` button (located on the `Clusters tab`) to open the `Create a new Server Cluster` dialog and define a new cluster.

If you are not a `Template Only` user, the `Create a New Server Cluster` dialog will prompt you to select a deployment option (see Figure 5.1).



*Figure 5.1 – Specify your server launch preferences.*

If you are a `Template Only` user or select the `Launch From Template` option on the deployment method selection dialog, a dialog opens that allows you to use a pre-defined template for the cluster configuration; for detailed information about using a template to create a cluster, see [Section 5.1.1](#).

If you select `Manually Define A Cluster`, the dialog shown in Figure 5.2 opens. For detailed information about manually defining a cluster, see [Section 5.1](#).

You can also use an existing cluster or a backup as a starting point for a new cluster. For detailed information about cloning a new server cluster from an existing cluster, see [Section 5.2](#). For information about restoring a backup to create a new cluster, see [Section 7.3](#).

## 5.1 Manually Creating a Cluster

Before you can connect to Postgres from a client application, you must create a server cluster. Use the `Launch DB Instance` button (located in the upper left panel of the `Dashboard Tab`) or click the `Add Server` button on the `Clusters` tab to open the `Create a New Server Cluster` dialog, as shown in Figure 5.2.

Please note: not all fields and tabs documented in the following sections are applicable for all console host types.

Figure 5.2 - Specify information about the new cluster on the Step 1 tab.

Use fields on the `Create a New Server Cluster` dialog to specify information about the new cluster:

- Specify a name for the new server cluster in the `Cluster Name` field.

Please Note: EDB Ark uses the name specified in the `Cluster Name` field to identify the cluster when performing management functions.

- Use the drop-down listbox in the `Engine Version` field to select the version of the Postgres engine that you wish to use.
- Use the drop-down listbox in the `Server Class` field to specify the size of each cluster node. The server class determines the size and type (compute power and RAM) of each node within the cluster.

You can adjust the amount of storage used by the cluster, or number of replicas in the cluster as your resource demands change. For example, you can start with a `m1.small` instance, and later, easily upgrade to a more capable `c1.medium` instance as your performance requirements dictate.

- If your cluster resides on an Amazon host, you can check the box to the left of `Use Private IP addresses` to display addresses that are in your private network in the `VPC` field.
- If your cluster resides on an Amazon host, use the drop-down listbox in the `VPC` field to specify the identity of the network in which the cluster should reside.
- Use the drop-down listbox in the `Number of nodes` field to specify the number of server nodes that you wish to create. The name specified in the `Cluster Name` field will apply to the master node; each additional node will act as a replication server for the master node.
- Use the `Storage GB` field to specify the initial size of the data space (in Gigabytes).
- Check the box next to `Encrypted` to indicate that the cluster should be encrypted. EDB Ark uses the `aes-xts-plain` (512-bit) cipher suite to provide an encryption environment that is both secure and transparent to connecting clients. When encryption is enabled, everything residing on the cluster is encrypted except for the root file system.
- If your cluster resides on an AWS host, check the box next to `EBS Optimized` to specify that your cluster should use an Amazon EBS-optimized instance and provisioned IOPS to guarantee a level of I/O performance.

The `IOPS` field is enabled for those clusters that will reside on an EBS-optimized instance. If applicable, use the field to specify the level of I/O performance that will be maintained for the cluster by automatic scaling. The maximum value is

30 times the size of your cluster; for example, if you have a 4 Gigabyte cluster, you can specify a maximum value of 120.

- Check the box next to `Perform OS and Software update?` to instruct EDB Ark to perform a `yum update` whenever the cluster is provisioned; this option is disabled for clusters that use statically provisioned servers. The `yum update` command updates all of the outdated packages that reside on the cluster. The update will occur when a cluster is scaled up, scaled down, or during a failover.

When you check the box next to `Perform OS and Software update ?`, EDB Ark will warn you that enabling this functionality can significantly slow down cluster operations. Updating packages may slow down cluster maintenance operations; an update can easily take 10 minutes or more, and will initiate a reboot of the node. This setting is persistent; if you enable software updates for a cluster, you cannot directly disable software updates for that cluster at a later time.

- Enter the name of the database superuser in the `Master User` field.
- Enter the password associated with the database superuser in the `Master Password` field.
- Use the `Notification Email` field to provide the email address that will receive notices about changes to the cluster status.

If applicable on your host system, click the `Next` button to continue to the `Step 2` tab (shown in Figure 5.3).

Type	Availability Zone	Subnet
Master	Auto Availability Zone	Create New Subnet
Replica	Auto Availability Zone	Create New Subnet
Replica	Auto Availability Zone	Create New Subnet

*Figure 5.3 - The Step 2 tab.*

Use the fields on the `Step 2` tab to specify additional database information:

- Use the `AVAILABILITY_ZONE` drop-down listbox to the right of each node to select the availability zone in which the node will reside.
- Use the `SUBNET` drop-down listbox to the right of each node to select the subnet that the node will use. Please note that if you manually specify a subnet, you must select a subnet that resides on your private network.

Click the `Next` button to continue to the `Step 3` tab (shown in Figure 5.4).

cidr	port
0.0.0.0/0	9999

*Figure 5.4 - Specify cluster security rules on the `Step 3` tab.*

Use the fields on the `Step 3` tab to define security rules that allow access to the cluster. By default, the load balancer port is open to any IP address for client connections; you may choose to delete the rule, and specify a more restrictive IP range.

To delete a rule from the list, highlight the entry and click the `Delete Rule` button; you will be prompted to confirm that you wish to delete the entry before the server removes the rule.

Click the `Add Rule` button to open the `Add Rule` dialog (see Figure 5.5) and provide access to a port.

*Figure 5.5 - Adding a security rule.*

On the `Add Rule` dialog:

- Use the `Port` drop-down listbox to select the port that can be accessed from the specified CIDR. A non-administrative user can allow access to ports:

9999 - for client connections and load balancing.

5432 or 5444 - the cluster specific database listener port.

An administrative user can use the `Add Rule` dialog to add a rule that allows SSH access to Port 22.

- Use the `CIDR` field to specify the address (or address range) that will be allowed access to the server through the selected port.

When you're finished, click `Apply` to create the security rule.

Then, click `Next` to continue to the `Step 4` tab (see Figure 5.6).

Figure 5.6 - Specify backup information on the `Step 4` tab.

Use the fields on the `Step 4` tab to specify additional database information:

- Use the `# of automatic backups to retain` field to specify the number of server backups stored. When the specified number of server backups is reached, EDB Ark will delete the oldest backup to make room for a new backup.

When point-in-time recovery (PITR) is enabled, the value specified in the `# of automatic backups to retain` setting determines the duration of the PITR backup window. For example, if you specify a value of 7, the PITR backup window will be 7 calendar days long.

- Use the `Backup Window` field to specify a time that it is convenient to backup the server (you may wish to schedule backups to occur when the CPU load is the lightest).
- Check the box next to `Continuous Archiving (Point-in-Time Recovery)` to enable point-in-time recovery for the cluster. When enabled, a base backup is automatically performed that can be used to restore to a specific point in time. All subsequent automatic scheduled backups will also support point-in-time recovery. Note that if you deselect this option, the cluster (and subsequent automatic backups) will be re-configured to not include support for point-in-time recovery.

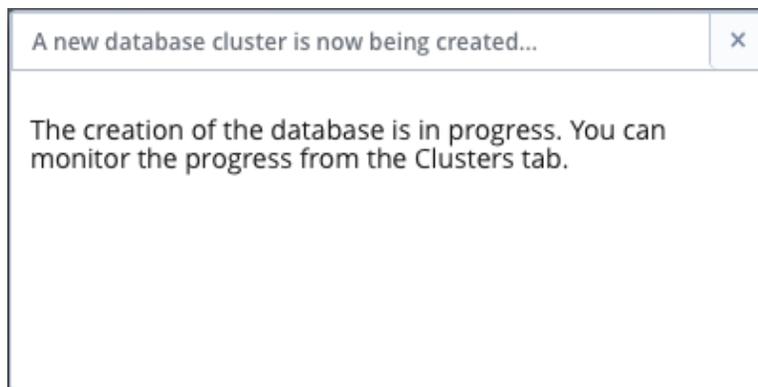
***Please Note:***

If your cluster resides on an Amazon host that is running CentOS 6.x, point-in-time recovery support is limited to the following regions:

```
ap-northeast-1
ap-southeast-1
ap-southeast-2
eu-west-1
sa-east-1
us-standard (us-east-1)
us-west-1
us-west-2
```

Use the `Previous` button or select a tab to return to a tab to review or update information; when you have completed the `Create a New Server` dialog, click `Launch` to create the database cluster.

A popup dialog confirms that EDB Ark is creating a new cluster (see Figure 5.7); click the `x` in the upper-right corner of the popup to close the popup.



*Figure 5.7 - A popup confirms that the new cluster is being created.*

Navigate to the `Clusters` tab of the Ark console to monitor the creation of the cluster.

### 5.1.1 Using a Template to Create a Cluster

If you select the `Launch From Template` option when deploying a cluster or are a `Template Only` user, a dialog that offers limited options will open when you deploy a cluster (see Figure 5.8).

Provide the details for your cluster

Template Name: `acctg_template` Full Template Details

Cluster Name:

DB Master User: `enterprisedb`

DB Master Password: `postgres`

Notification Email: `scott.ward@enterprisedb.com`

Availability Zone and Subnet Details

Type	Availability Zone	Subnet
Master	Auto Availability Zone	Create New Subnet
Replica	Auto Availability Zone	Create New Subnet

Configure Network Security Rules

cidr	port
0.0.0.0/0	9999

Add Rule Delete Rule

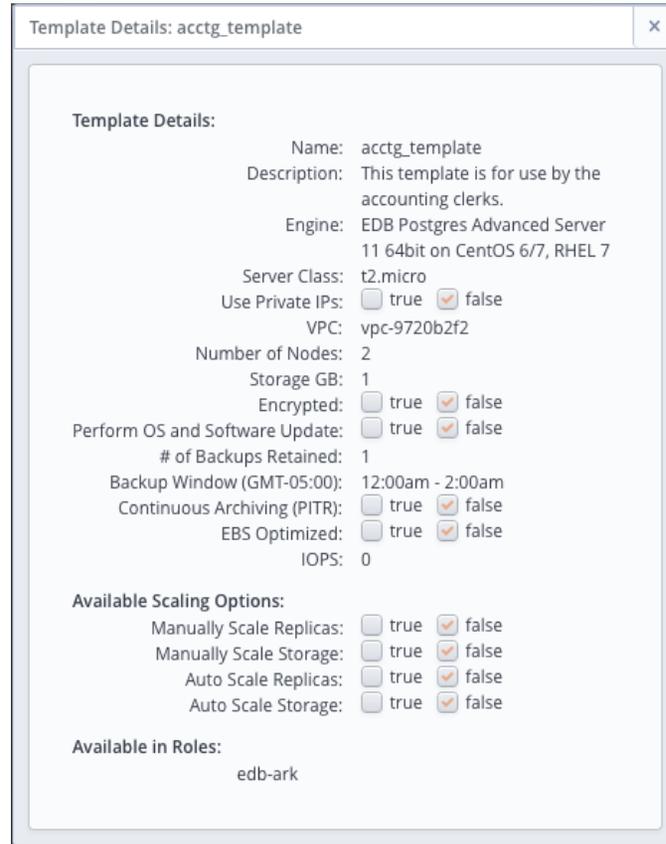
Cancel Launch

*Figure 5.8 - Creating a cluster from a template.*

Use the `Template Name` drop-down listbox to select the template that you wish to use to configure your cluster. After selecting the template, use the fields on the dialog to provide information about the new cluster:

- Use the `Template Name` drop-down listbox to select a template.

To review template configuration details, select the `Full Template Details` link; the `Template Details` dialog opens as shown in Figure 5.9.



*Figure 5.9 - Reviewing Template details*

After selecting the template that you wish to use, use the fields on the `Create a New Server Cluster` dialog to finish defining your cluster:

- Use the `Cluster Name` field to specify a name for the new cluster.
- Use the `DB Master User` field to specify the name of the database superuser.
- Use the `DB Master Password` field to specify the password associated with the database superuser.
- Use the `Notification Email` field to provide the email address that will receive notices about changes to the cluster status.
- If applicable, use the `AVAILABILITY_ZONE` drop-down listbox to the right of each node to select the availability zone in which the node will reside.

- If applicable, use the `SUBNET` drop-down listbox to the right of each node to select the subnet that the node will use.
- If applicable, use the `Add Rule` button to open the `Add Rule` dialog and define one or more security rules for the cluster.

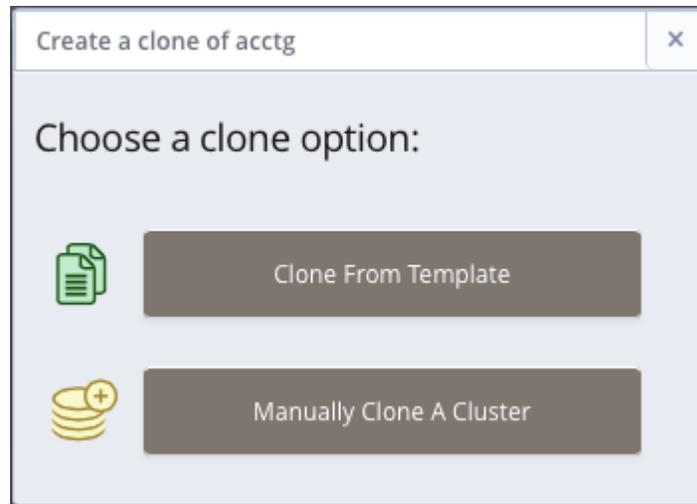
After completing the `Launch From Template` dialog, click the `Launch` button to provision a cluster that conforms to the cluster configuration.

## 5.2 Cloning a Server Cluster

With a few simple steps, you can create a developer sandbox that contains a duplicate of the original master node.



To clone a cluster, navigate to the `Clusters` tab and highlight the name of the cluster you wish to clone; then, click the `Clone` icon from the left margin. If you are not a Template Only user, a dialog will open that allows you to select your deployment method (see Figure 5.10).



*Figure 5.10 - Selecting a Cloning option.*

If you are a Template Only user or select the `Clone From Template` option on the deployment method selection dialog, a dialog opens that allows you to use a pre-defined template for the cluster configuration; for detailed information about using a template to clone a cluster, see Section [5.2.1](#).

If you select `Manually Clone A Backup`, the dialog shown in Figure 5.11 opens.

Cluster Name

Encryption

Perform OS and Software update?

Use Private IP addresses

VPC

New VPC

Availability Zone

Auto Availability Zone

Subnet

Create New Subnet

Server Class

t2.small

EBS Optimized

IOPS

0

Continuous Archiving (Point-in-Time Recovery)

Configure Network Security Rules

cidr	port
0.0.0.0/0	9999

Add Rule Delete Rule

Cancel Clone

*Figure 5.11 - Creating a clone of a database.*

When the `Create clone...` dialog opens, provide values in the requested fields:

- Provide a name for the new cluster in the `Cluster Name` field.
- Check the box next to `Encryption` if you would like the clone to be created in an encrypted cluster.
- Check the box next to `Perform OS and Software update?` if you would like the server to perform a software update each time the clone is provisioned. Please note: this option is disabled if the database engine is statically provisioned.
- If your cluster resides on an Amazon host, use the `VPC` drop-down list box to specify a network name.

- Use the `Availability Zone` drop-down listbox to specify the availability zone in which the new cluster will be created.
- Use the `Subnet` drop-down listbox to select a subnet that will be used by the new cluster.
- Use the `Server Class` drop-down listbox to specify the initial size of the new cluster.
- If your cluster resides on an AWS host, check the box next to `EBS Optimized` to specify that your cluster should use an Amazon EBS-optimized instance and provisioned IOPS to guarantee a level of I/O performance;
- The `IOPS` field is enabled for those clusters that will reside on an EBS-optimized instance. If applicable, use the field to specify the level of I/O performance that will be maintained for the cluster by automatic scaling.
- Check the box next to `Continuous Archiving (Point-in-Time Recovery)` to enable point-in-time recovery on the clone.

When you've completed the dialog, click the `Clone` button to create the sandbox.

When you clone a database, only the master node is recreated in the new cluster; for information about manually adding replica servers to the new cluster, see Section 9, *Manual Scaling*.

## 5.2.1 Using a Template to Clone a Cluster

A clone deployed with a template will be an exact duplicate of the original master node, but will adhere to the cluster deployment rules described in the template by the system administrator. If you are a Template Only user, you will be required to use a template when cloning a cluster. A non-TemplateOnly user may find it easier (especially when cloning a number of clusters) to use a template to define the properties that are common to multiple deployments.

The screenshot shows a dialog box titled "Create a clone of payables". It has a close button (X) in the top right corner. The main content area is titled "Provide template parameters".

- Template Name:** A dropdown menu showing "acctg\_template". Below it is a button labeled "Full Template Details".
- Cluster Name:** An empty text input field.
- Availability Zone:** A dropdown menu showing "Auto Availability Zone".
- Subnet:** A dropdown menu showing "Create New Subnet".

Below the "Subnet" field is a section titled "Configure Network Security Rules". It contains a table with two columns: "cidr" and "port".

cidr	port
0.0.0.0/0	9999

Below the table are two buttons: "Add Rule" and "Delete Rule". At the bottom right of the dialog are two buttons: "Cancel" and "Clone".

*Figure 5.12 - Creating a clone of a database.*

When the `Create clone...` dialog opens (see Figure 5.12), provide values in the requested fields:

- Use the `Template Name` drop-down listbox to select a template that will be used for the new cluster; to review the cluster details associated with the template, click the `Full Template Details` link.
- Provide a name for the clone in the `Cluster Name` field.
- If applicable, use the `Availability Zone` drop-down listbox to specify the availability zone in which the new cluster will be created.

- If applicable, use the `Subnet` drop-down listbox to select a subnet that will be used by the new cluster.

Use the fields in the `Configure Network Security Rules` section to define security rules that allow access to the cluster. By default, the load balancer port is open to any IP address for client connections; you may choose to delete the rule, and specify a more restrictive IP range.

To delete a rule from the list, highlight the rule and click the `Delete Rule` button; you will be prompted to confirm that you wish to delete the entry before the server removes the rule.

Click the `Add Rule` button to open the `Add Rule` dialog (see Figure 5.5) and provide access to a port.

*Figure 5.5 - Adding a security rule.*

On the `Add Rule` dialog:

- Use the `Port` drop-down listbox to select the port that can be accessed from the specified CIDR. A non-administrative user can allow access to ports:

9999 - for client connections and load balancing.

5432 or 5444 - the cluster specific database listener port.

An administrative user can use the `Add Rule` dialog to add a rule that allows SSH access to Port 22.

- Use the `CIDR` field to specify the address (or address range) that will be allowed access to the server through the selected port.

When you're finished, click `Apply` to create the security rule.

After providing the details for the cluster, click the `Clone` button to create the clone of the cluster; select `Cancel` to exit the dialog without creating a cluster.

### 5.3 Modifying a Cluster's Administrative Settings

Fields on the `Administrative Settings` dialog display the current owner and the email address to which notification emails about the state of the cluster are sent.



#### Administrative Settings

To modify the owner of a cluster or the email address associated with a cluster, highlight the name of a cluster on the `Clusters` tab, and click the `Administrative Settings` icon. The dialog shown in Figure 5.13 opens.

Configure Network Security Rules	
cidr	port
0.0.0.0/0	9999

Figure 5.13 – The Administrative Settings dialog.

Use the fields on the dialog to modify the administrative settings for the cluster:

- Use the drop-down listbox in the `Owner` field to select a new cluster owner. Please note that only those users with permissions to access the tenant on which the cluster resides are included in the list.
- Use the `Notification Email` field to specify the address to which you wish notices about the state of the cluster to be sent.

Use the fields in the `Configure Network Security Rules` section to define security rules that allow access to the cluster. By default, the load balancer port is open to any IP

address for client connections; you may choose to delete the rule, and specify a more restrictive IP range.

To delete a rule from the list, highlight the rule and click the `Delete Rule` button; you will be prompted to confirm that you wish to delete the entry before the server removes the rule.

Click the `Add Rule` button to open the `Add Rule` dialog (see Figure 5.5) and provide access to a port.

*Figure 5.5 - Adding a security rule.*

On the `Add Rule` dialog:

- Use the `Port` drop-down listbox to select the port that can be accessed from the specified CIDR. A non-administrative user can allow access to ports:

9999 - for client connections and load balancing.

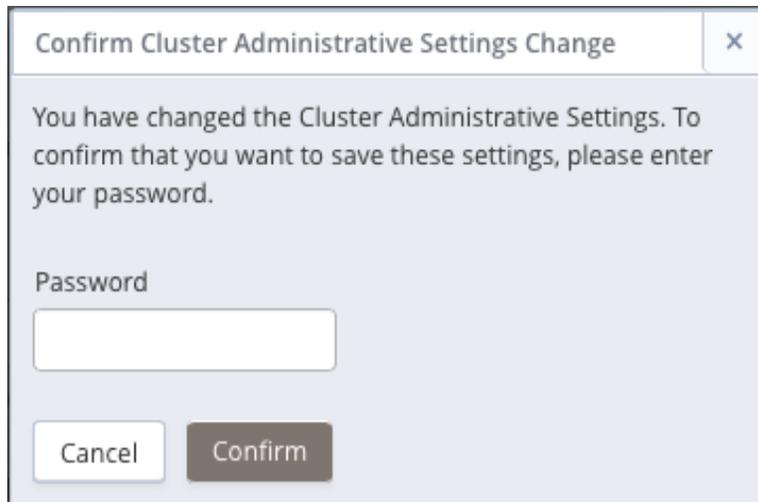
5432 or 5444 - the cluster specific database listener port.

An administrative user can use the `Add Rule` dialog to add a rule that allows SSH access to Port 22.

- Use the `CIDR` field to specify the address (or address range) that will be allowed access to the server through the selected port.

When you're finished, click `Apply` to create the security rule.

After modifying the configuration details for the cluster, click the `Confirm` button; a dialog will open, prompting you to provide the password associated with the connected session (see Figure 5.14).



*Figure 5.14 – Provide a password to confirm changes.*

Provide a password in the `Password` field and click `Confirm` to save your changes and exit, or `Cancel` to exit without saving the changes.

## 6 Connecting an Application to an EDB Ark Cluster

To connect to an Ark cluster, provide the IP address and port of the server, and the credentials associated with the role defined when the server cluster was created.

ADDRESS	AZ	SUBNET	LB PORT	DB PORT	CXN	VM	HA	DB	UP
ec2-34-195-197-155.cc	us-east-1f	subnet-0da45bc0d6f238ece	9999	5444	5	✓	✓	✓	✓
ec2-3-80-90-191.cor	us-east-1b	subnet-03b154a8801ae0e7d		5444	3	✓	✓	✓	✓
ec2-34-230-41-242.c	us-east-1a	subnet-033a26c6cd36d935f		5444	3	✓	✓	✓	✓

Cluster: acctg  
 Creation Date: Tue Dec 11 14:57:56 GMT-05:00 2018  
 DB Username: enterprisedb  
 Owner: scott.ward@enterprisedb.com  
 Email: scott.ward@enterprisedb.com  
 Size: 1gb  
 Region: us-east-1  
 VPC ID: vpc-9720b2f2  
 Server Class: t2.micro  
 Engine Version: EDB Postgres Advanced Server 11 64bit on CentOS 6/7, RHEL 7  
 Template used at creation: acctg\_template  
 OS/SW update on creation: false  
 Monitor Load Balancer Health  
 Monitor Database Health  
 Cluster healing mode:  
 Replace failed master with a new master  
 Replace failed master with existing replica

Auto Scale Options  
 % of Storage Size used 65  
 # of Server Connections 95

Backup Settings (GMT-05:00)  
 Backup Window: 12:00am - 2:00am  
 Backup Retention: 1  
 Continuous Archiving (Point-in-Time Recovery)

Figure 6.1- The Details panel on the Clusters tab.

If you have defined a cluster with two or more servers, client applications should always connect to the load balancing port of the master server (the first DNS name listed in the `Details` panel). This will ensure that read requests are distributed efficiently across the cluster replicas to maximize performance, while write requests are directed only to the cluster master. Replica server nodes are listed below the master node in the tree view.

- The `DNSNAME` column displays the address of the node; a connecting client should use this address when connecting to a specific server (see Figure 6.1).
- The `LB PORT` column displays the port number to which a client application should connect to utilize load balancing.

Since only the master node of a multi-server cluster operates in read/write mode, all write queries will be directed to the master node, while any read-only queries may be directed to a replica node.

- The `DB_PORT` column displays the default listener port for the Advanced Server or PostgreSQL server. To connect directly to the database listener port, modify the cluster's security group to allow connections from your client.

Use the authentication information (`Master User` and `Master Password`) provided on the `Create a New Server Cluster` dialog to establish the initial connection to the cluster as the database superuser. Please note that connecting with this identity grants you superuser privileges on the server; you should not share this connection information with un-trusted users.

After connecting as the database superuser, you should create lesser-privileged user roles with which non-administrative users will connect.

For detailed information about connecting to an EDB Ark cluster, please see Section [6](#), *Connecting to the Cluster*.

## 6.1 Using iptables Rules

In addition to configuring security groups on the Cloud Provider, EDB Ark uses iptables rules to manage security on the console and cluster nodes. Please note that you must *not* modify the iptables rules provided by EDB Ark.

If you are using iptables on the host of the Ark console, do not modify the following rules:

```
iptables -A PREROUTING -t nat -i eth0 -p tcp --dport 80 -j
    REDIRECT --to-port 8080
iptables -A PREROUTING -t nat -i eth0 -p tcp --dport 443 -j
    REDIRECT --to-port 8181
iptables -I INPUT 1 -p tcp --dport 8181 -j ACCEPT
iptables -I INPUT 1 -p tcp --dport 8080 -j ACCEPT
```

These rules:

- redirect `http` and `https` traffic on ports 80 and 443 to the default ports (8080 and 8181).
- allow inbound traffic to the default administration port.
- allow inbound traffic on 8080 and 8181.
- save the configuration (to preserve the behaviors when the system reboots).

If you are using iptables on an Advanced Server cluster, do not modify the following rules:

```
iptables -I INPUT 1 -p tcp --dport 7800:7802 -j ACCEPT
iptables -I INPUT 1 -p tcp --dport 5444 -j ACCEPT
iptables -I INPUT 1 -p tcp --dport 9999 -j ACCEPT
```

If you are using iptables on a PostgreSQL cluster, do not modify the following rules:

```
iptables -I INPUT 1 -p tcp --dport 7800:7802 -j ACCEPT
iptables -I INPUT 1 -p tcp --dport 5432 -j ACCEPT
iptables -I INPUT 1 -p tcp --dport 9999 -j ACCEPT
```

The rules:

- allow inbound traffic from the Ark console on ports 7800 and 7802.
- allow inbound traffic on the database listener ports.
- save the configuration (to preserve the behaviors when the system reboots).

## 7 Managing Backups and Recovery

When you use the Ark console to take a backup, EDB Ark makes a copy of the contents of the PostgreSQL `PGDATA` directory. The `PGDATA` directory contains the data and the meta-data required to construct an exact copy of the Postgres data cluster (the data and the database objects that reside within that Postgres instance).



Backup

To capture a backup of a cluster, navigate to the `Clusters` tab, highlight a name in the cluster list, and click the `Backup` icon.

*Figure 7.1 - The Backup Data? dialog.*

You can include a reference note about the backup that can be viewed on the `Backups` tab by adding a message to the `Optional notes` field on the `Backup Data?` dialog before clicking the `Backup` button (see Figure 7.1).

When you click the `Backup` button, EDB Ark will perform the backup. While EDB Ark performs the backup, the `PENDING` column of the selected cluster (on the `Clusters` tab) will display the message, `Backup in progress`.

## 7.1 Performing a Base Backup for Point-In-Time Recovery

When point-in-time recovery is enabled, a base backup is automatically performed that can be used to restore to a specific point in time. All subsequent automatic scheduled backups will also support point-in-time recovery. Note that if you deselect this option, the cluster (and subsequent automatic backups) will be re-configured to not include support for point-in-time recovery.

When point-in-time recovery is enabled, the value specified in the `Backup Retention` field of the `Create cluster` dialog determines the duration of the point-in-time recovery backup window. For example, if you specify a value of 7, the backup window will be 7 calendar days long. When the backup retention threshold is reached, the oldest base backup is removed, as well as any WAL files required to perform a recovery with that backup.

Please note that you cannot perform a base backup on a cluster while the database is in recovery and not accepting connections. If you attempt to perform a base backup during recovery, the backup will fail (the failure will be noted on the `Events` panel of the `Clusters` tab). You should instead wait until the database recovery is complete to enable point-in-time recovery for the cluster.

Point-in-time recovery is enabled on the `Details` panel of the `Clusters` tab. If a base backup fails, you can trigger EDB Ark to perform a base backup by disabling point-in-time recovery, and then (after waiting a few minutes) re-enable point-in-time recovery.

## 7.2 Reviewing Stored Backups

Navigate to the `Backups` tab (shown in Figure 7.2) to review a list of stored cluster backups.

	ID	Cluster	Notes	Engine Version	Capacity	Started	Ended
Recover Backup	snap-05cba7312a317d575	acctg		EDB Postgres Advanced Server 11 64bit on CentOS 6/7, RHEL 7	2 GB	Tue Dec 11 16:11:44 GMT-05:00 2018	Tue Dec 11 16:12:01 GMT-05:00 2018
Delete Backup	snap-05dbe3d85ca2ac14b	payables	(PITR) Base backup: Tue Dec 11 15:27:58 GMT-05:00 2018	EDB Postgres Advanced Server 11 64bit on CentOS 6/7, RHEL 7	3 GB (encrypted)	Tue Dec 11 15:27:58 GMT-05:00 2018	Tue Dec 11 15:28:46 GMT-05:00 2018
	snap-09a335a43254ebbc4	sales	(PITR) Base backup: Tue Dec 11 14:52:07 GMT-05:00 2018	EDB Postgres Advanced Server 11 64bit on CentOS 6/7, RHEL 7	5 GB	Tue Dec 11 14:52:07 GMT-05:00 2018	Tue Dec 11 14:53:26 GMT-05:00 2018

Figure 7.2 - The Backups tab of the Ark console.

A backup captures and stores the status and condition of a cluster at a specific point-in-time.

- The `ID` column contains a unique backup identifier.
- The `CLUSTER` column displays the name of the cluster that was the target of the backup.
- The `NOTES` column displays an informational note (provided by either the user or the system at the time of backup). Those messages that include (PITR) can be restored to a specific point-in-time within the backup window.
- The `ENGINE VERSION` column contains a description of the Postgres version that the saved cluster is using.
- The `CAPACITY` column contains the storage capacity of the cluster at the time that the backup was taken.
- The `STARTED` column displays the date and time that the backup was initiated.
- The `ENDED` column displays the date and time that the backup completed.

You can use the icons on the left side of the `Backups` tab to restore or delete the selected backup:



### Recover Backup

Highlight a backup in the list, and click the `Recover Backup` icon to open a dialog that allows you to restore a cluster from the selected backup.



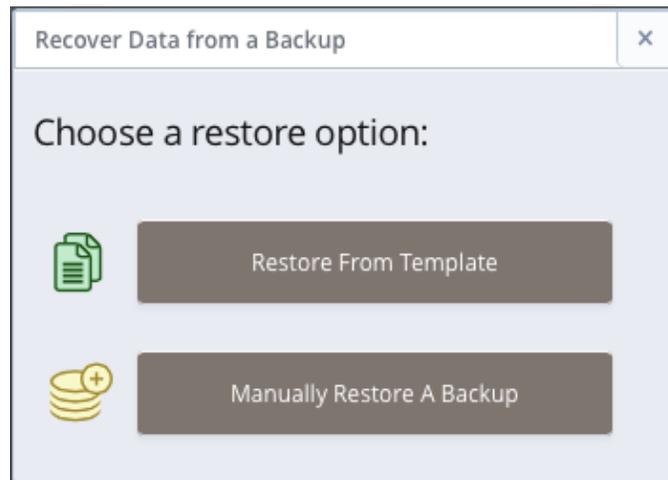
### Delete Backup

Highlight one or more backups in the list and click the `Delete Backup` icon to delete the selected backups. A popup will ask you to confirm that you wish to delete the selected backups before the backups are actually deleted.

### 7.3 Restoring a Cluster from Backup

You can use a template or manually provide cluster properties when restoring a cluster from a backup. To restore a backup into a new cluster, navigate to the `Backups` tab and highlight the name of a backup. Then, click the `Recover Backup` icon, located in the left margin.

If you are not a `Template Only` user, a dialog will open that allows you to select the method by which you will specify cluster preferences (see Figure 7.3).



*Figure 7.3 - Selecting a Restore option.*

If you are a `Template Only` user or select the `Restore From Template` option on the recovery method dialog, a dialog opens that allows you to use a pre-defined template for the cluster configuration; for detailed information about using a template to clone a cluster, see Section [7.3.1](#).

If you select `Manually Restore A Backup`, the dialog shown in Figure 7.4 opens.

×
Recover Data from a Backup

Tue Dec 11 14:52:07 GMT-05:00 2018 - 5.0gb

Recovery Point

📅
12/11/18 02:52:07 PM

Cluster Name

Encryption

Perform OS and Software update?

Use Private IP addresses

VPC

New VPC
▼

Availability Zone

Auto Availability Zone
▼

Subnet

Create New Subnet
▼

Server Class

t2.micro
▼

EBS Optimized

IOPS

0

Continuous Archiving (Point-in-Time Recovery)

Configure Network Security Rules

cidr	port
0.0.0.0/0	9999

Add Rule

Delete Rule

Cancel

Recover

Figure 7.4 - The Recover Data from a Backup dialog.

When the `Recover Data from a Backup` dialog (shown in Figure 7.4) opens:

- If applicable, use the calendar selector in the `Recovery Point` field to specify the recovery target (the date and time that the database was in the state in which you wish the new cluster to start). The `Recovery Point` field is only displayed for backups that were taken with point-in-time recovery implemented; you cannot perform a point-in-time recovery with a backup unless point-in-time recovery is enabled for the cluster when the backup was taken.
- Specify a name for the new cluster in the `Cluster Name` field.
- Check the box next to `Encryption` to specify that the new cluster should reside in an encrypted cluster. Please note that you can restore a non-encrypted backup into an encrypted cluster.
- Check the box next to `Perform OS and Software update` to instruct EDB Ark to perform a `yum update` whenever the cluster is provisioned. Please note: this option is disabled if the database engine is statically provisioned.
- If applicable, check the box to the left of `Use Private IP addresses` to restore the backup into a private IP address.
- If your cluster resides on an Amazon host, use the `VPC` drop-down listbox to select a VPC on which the cluster will reside.
- Use the `Availability Zone` drop-down listbox to the right of each node to select the availability zone in which the node will reside.
- Use the `Subnet` drop-down listbox to the right of each node to select the subnet that the node will use.
- Use the `Server Class` drop-down listbox to specify the server class of the new cluster.
- If your cluster resides on an AWS host, check the box next to `EBS Optimized` to specify that your cluster should use an Amazon EBS-optimized instance and provisioned IOPS to guarantee a level of I/O performance;

The `IOPS` field is enabled for those clusters that will reside on an EBS-optimized instance. If applicable, use the field to specify the level of I/O performance that will be maintained for the cluster by automatic scaling. The maximum value is 30 times the size of your cluster; for example, if you have a 4 Gigabyte cluster, you can specify a maximum value of 120.

Note that you can increase the `IOPS` value of your cluster by recovering the cluster from a snapshot into a cluster with a higher value or cloning your database into a cluster with a higher `IOPS` value.

- Check the box next to `Continuous Archiving (Point-In-Time Recovery)` to indicate that the new cluster should implement point-in-time recovery. Please note that to restore into a cluster with point-in-time recovery enabled, the backup from which you are restoring must have had point-in-time recovery implemented when the backup was taken. The checkbox will not be available if point-in-time recovery was not implemented when the backup was taken.
- Use the `Add Rule` button to open a dialog that allows you to open a port for connections from a specified CIDR formatted address. On the `Add Rule` dialog:

Use the `Port` drop-down list box to select the port that can be accessed from the specified CIDR. A non-administrative user can allow access to ports:

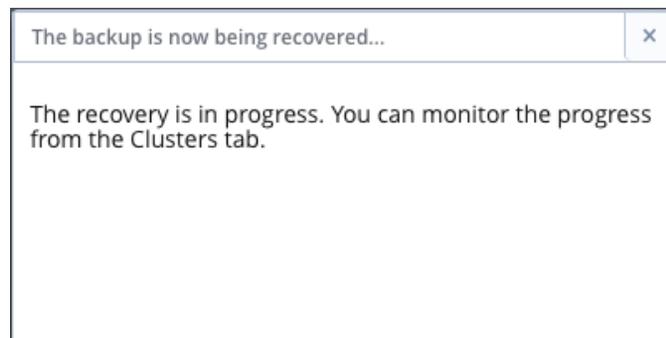
- 9999 - for client connections and load balancing.
- 5432 or 5444 - the cluster specific database listener port.
- An administrative user can use the `Add Rule` dialog to add a rule that allows SSH access to Port 22.

Use the `CIDR` field to specify the address (or address range) that will be allowed access to the server through the selected port.

When you're finished, click `Apply` to create the security rule and continue.

- Highlight a rule and click the `Delete Rule` button to remove a security rule.

Click the `Recover` button to continue, or the `Cancel` button to exit without starting the recovery process. A popup confirms that the cluster is being restored (see Figure 7.5); close the popup and navigate to the `Clusters` tab to monitor the restoration process.



*Figure 7.5 – The recovery is in progress.*

Please note: when you restore a backup, the server configuration will match the original configuration, but the server addresses will change.

Please note: when restoring a cluster from backup, you may need to modify parameters in the `postgresql.conf` file on the restored cluster to reflect the available memory of the new instance if the server class has changed from the original setting (the default value in the `Server Class` field). After modifying the server configuration, restart the server for the changes to take effect.

### 7.3.1 Using a Template to Restore from Backup

If you are a Template Only user, you will be required to use a template when restoring a backup into a new cluster. A non-Template Only user may find it easier (especially when restoring a number of clusters) to use a template to define the properties that are common to multiple deployments.

Figure 7.6 - Using a template to restore from a backup.

If you are using a template when restoring a cluster from backup, use the dialog shown in Figure 7.6 to provide the non-template details:

- Use the `Template Name` drop-down listbox to select a template that will be used for the new cluster; to review the cluster details associated with the template, click the `Full Template Details` link.
- If applicable, use the calendar selector to specify a point-in-time to which to recover.
- Specify a name for the new cluster in the `Cluster Name` field.

- Use the `Availability Zone` drop-down listbox to the right of each node to select the availability zone in which the node will reside.
- Use the `Subnet` drop-down listbox to the right of each node to select the subnet that the node will use.
- Use the `Add Rule` button to open a dialog that allows you to open a port for connections from a specified CIDR formatted address.
- Highlight a rule and click the `Delete Rule` button to remove a security rule.

## 8 Automatic Failover

The EDB Ark cluster manager constantly monitors the state of each cluster. Each cluster is composed of a single master Postgres instance that operates in read-write mode (performing all writes to the database) and one or more replica Postgres instances. Replica nodes are read-only, automatically duplicating all data found on the master node, and all changes made to that data.

If a replica fails, EDB Ark automatically spins up a new replica instance and attaches it to the master database. The cluster continues operating during the replacement process, with the master servicing writes and reads, and the remaining replicas servicing reads. Overall read performance may degrade for a short period of time until the cluster is returned to full strength.

If a master failover occurs, the server will enforce one of two behaviors, specified by the `Cluster healing mode` radio buttons, located on the `Details` panel of the `Clusters` tab:

- Select the `Replace failed master with a new master` radio button to specify that the cluster manager should create a new master to replace a failed master node.

When replacing a failed master node with a new master node, the data volumes from the failed instance are attached to the new master node, preserving all transactions that were committed on the master.

- Select the `Replace failed master with existing replica` radio button to specify that the cluster manager should promote a replica node to be the new master node for the cluster. Choose this option when speed of recovery is important, and your application can tolerate the loss of some transactions. This is the default behavior.

When replacing a failed master node with an existing replica, a replica node is marked for promotion to master node, while the other replica nodes are re-configured to replicate data from the new master node. Since replica nodes use asynchronous replication, any data that was committed to the old master node, but not yet pushed to the replica prior to the node failure will be lost.

If you opt to promote a replica to replace the master node, a replacement replica will also be added to the cluster during the failover process, returning the cluster to full strength. This self-healing property is at the heart of providing high availability to cluster users.

Please note that replacing a failed master node with a new master node can take a bit longer than promoting a replica node to the role of master, but it does have the advantage of guaranteeing that no committed data will be lost.

### *Triggering a Failover*

By design, EDB Ark does *\*not\** perform a failover when the Postgres server is stopped, because the server stop or restart may be intentional:

- A user may intentionally restart the server when performing maintenance or tuning. For example, a server restart is required when updating server configuration parameters; this restart will not invoke failover.
- If a user intentionally kills the `postmaster` process, the server will not failover; the `postmaster` process is responsible for restarting the server.
- The Postgres server may intentionally perform a server restart. For example, when a backend server process crashes (or is intentionally killed by a user), the Postgres server automatically invokes a restart.

When a failover is complete, EDB Ark does not delete the original master instance of the database; you can use the preserved master instance to perform many post-mortem activities that may be required. If you do not wish to utilize the preserved instance, you should use the management console to delete the instance.

## 9 Manual Scaling

The Ark console makes it simple to add replicas and storage to an existing cluster, or to upgrade to a larger server class (i.e. vertical scaling).

- Adding additional replicas to your database cluster increases the CPU power available to handle additional client requests or applications, increasing the number of client connections that can be serviced. When the scale up is complete, each additional replica automatically assumes a share of the read-only workload from incoming queries.
- Adding additional storage to the cluster increases the amount of data that can be stored by the database servers. When you add additional storage to the cluster, each member of the cluster gets the additional storage amount.
- Vertically scaling to a larger server class increases the processing capabilities of your cluster, allowing the server to process customer requests with greater speed.

You can also downsize a cluster by selectively removing a replica. You can machine scale to a smaller machine type to reduce resource usage (cpu/memory) and/or cost.

Please note: if you are a Template Only user, access to automatic scaling behaviors is determined by the configuration specified on the template used to deploy your cluster.

## 9.1 Manually Adding Replicas and Storage

EDB Ark's `Scale Up` dialog makes it simple to manually add additional replicas to a cluster if you find that server resources are strained. The dialog also allows you to increase the amount of storage available to a cluster.

If you specify that EDB Ark should add both storage and replicas, EDB Ark will process the request for additional storage *before* adding replicas to the cluster. All of the nodes on the cluster will be of the newly specified storage size.



To add a replica or storage space to a cluster, navigate to the `Clusters` tab, highlight a cluster name, and select the `Scale Up` icon. The `Scale Up` dialog opens as shown in Figure 9.1.

Type	Availability Zone	Subnet
Master	us-east-1e	subnet-07ae6c3228
Replica	us-east-1f	subnet-029af6d0c7!
Replica	us-east-1a	subnet-051ed59122

Figure 9.1 - The Scale Up dialog.

Use the drop-down listboxes on the `Step 1` tab to specify:

- The number of replicas to add to the cluster.

- The availability zone in which each node of the cluster will be provisioned.
- The subnet that will be used by each node of the cluster.
- The amount of storage memory (in Gigabytes) that will be added to each server in the cluster.

When you've completed the dialog, click `Next` to continue to the `Step 2` tab (shown in Figure 9.2).



*Figure 9.2 - The Scale Up dialog.*

Use the `Previous` button to return to the `Step 1` tab to modify specified values. Use the `Scale Up` button to confirm that you wish to add the specified number of replication servers or the specified amount of memory to the cluster. Use the `Cancel` button, or simply close the dialog to exit without modifying the cluster.

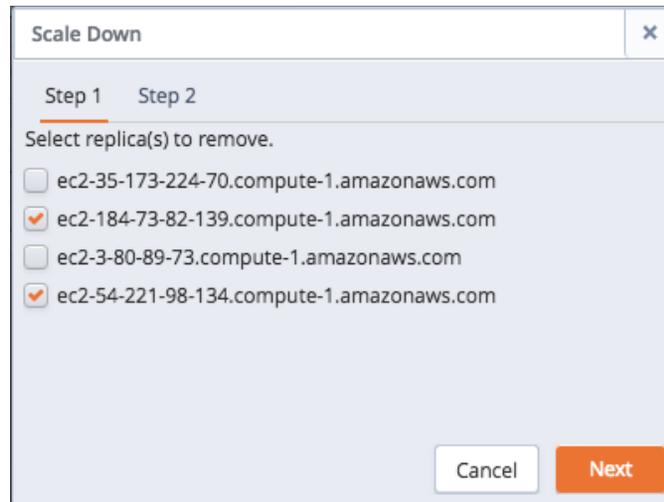
When scaling begins, EDB Ark will confirm that replicas or memory are being added to the cluster.

## 9.2 Manually Removing a Replica

EDB Ark's `Scale Down` dialog makes it simple to manually remove one or more unneeded replicas from a cluster.

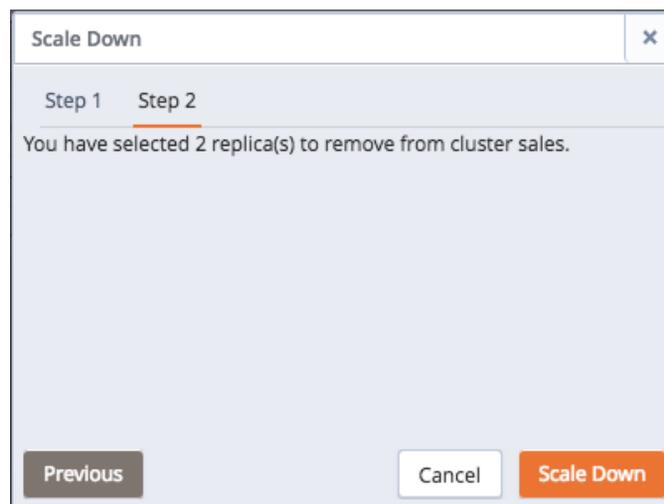


**Scale Down** To delete a replica, navigate to the `Clusters` tab, and click the `Scale Down` icon (shown above). The `Scale Down` dialog opens as shown in Figure 9.3.



*Figure 9.3 - The Scale Down dialog.*

Check the box to the left of the name of a replica, and click `Next` to proceed to the `Step 2` tab of the dialog (shown in Figure 9.4).



*Figure 9.4 - The Step 2 tab of the Scale Down dialog.*

Click `Scale Down` to confirm that you wish to remove the replica, or `Previous` to return to the `Step 1` tab. Use the `Cancel` button, or simply close the dialog to exit without modifying the cluster.

### 9.3 Manually Changing the Server Class

When your RAM processing needs, CPU power, or other circumstances warrant a larger virtual machine for your application, you can vertically scale to a larger server class. You can either:

- Use the `Scale Machine Type` dialog to copy the cluster into a larger server class.

When you use the `Scale Machine Type` dialog to move your cluster into a larger server class, you must provide a new name for the upgraded cluster. You can also use the dialog to specify that EDB Ark should re-assign the IP address of the cluster, so the upgrade will be transparent to connecting clients.

Please note: you may wish to postpone the IP address reassignment to perform configuration tasks or test the new server size.

- Use the `pg_dump` and `pg_restore` utilities to move the cluster into a larger server class.

To move to a larger server class, use the `pg_dump` utility to make a backup of the cluster. After backing up the cluster, create a new instance with the larger server class, and use `pg_restore` to restore the cluster on the new instance. For more information about using `pg_dump` and `pg_restore`, see [Section 13.2 Moving an Existing Database into a New Cluster](#).

You can also downsize a cluster by selectively removing a replica. You can machine scale to a smaller machine type to reduce resource usage (cpu/memory) and/or cost.

When you vertically scale your cluster with the `Scale Machine Type` dialog, EDB Ark will copy the existing cluster into a new cluster of a different server class, and optionally re-assign the IP address of the existing cluster to the new cluster.



To open the `Scale Machine Type` dialog, navigate to the `Clusters` tab, and select the `Scale Machine Type` icon.

*Figure 9.5 - The Scale Machine Type dialog.*

Use the fields on the `ScaleMachineType` dialog (shown in Figure 9.5) to specify details about the new cluster:

- Check the box next to `Perform OS and Software update` to instruct EDB Ark to perform a `yum update` whenever the cluster is provisioned. Please note: this option is disabled if the database engine used to provision the cluster is statically provisioned.
- Use the `ServerClass` drop-down list box to specify the size of the new cluster.

Please note that if you are a `Template Only` user, the types listed in the `ServerClass` drop-down list box will be limited to those types that are included in template definitions for the current tenant.

When you click the `Scale` button to start scaling the cluster, EDB Ark will confirm that the scaling is in progress.

Before creating the new cluster, EDB Ark will perform a backup of the original cluster. During the process, status indicators in the `PENDING` column of the `Clusters` tab will keep you informed as EDB Ark backs up the original cluster, and initializes the new cluster.

# 10 Automatic Scaling

Adding additional replicas to your database cluster increases the number of client connections and queries that each cluster can handle, while maintaining a high-level of overall performance. Each additional replica automatically assumes a share of the read-only workload from incoming queries.

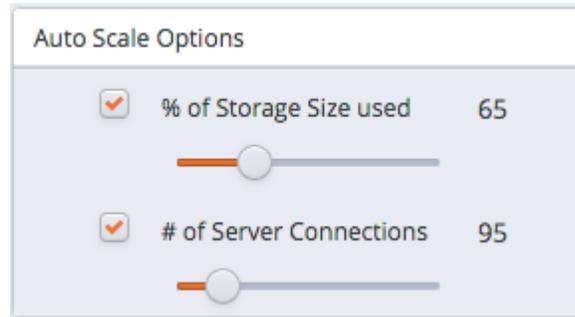
When auto-scaling is enabled, EDB Ark monitors the server storage and connection resources in use, and automatically adds additional resources when usage exceeds a user specified percent.

- When the % of `Storage Size` used is reached, EDB Ark will automatically increase your data space by 50%.
- When the # of `Server Connections` is reached, EDB Ark adds replica nodes.

Please note: if you are a `Template Only` user, access to automatic scaling behaviors is determined by the configuration specified on the template used to deploy your cluster.

## 10.1 Adjusting the Automatic Scaling Thresholds

Use the `AutoScaleOptions` controls (shown in Figure 10.1) to adjust the threshold at which EDB Ark automatically scales up cluster resources. The `AutoScaleOptions` controls are located on the `Details` panel; to access the `Details` panel, navigate to the `Clusters` tab, and highlight the name of a cluster.



*Figure 10.1 - The Auto Scale Options controls.*

Adjust the `AutoScaleOptions` sliders to increase or decrease the thresholds at which automatic scaling is invoked. When you modify the values, EDB Ark will display a `New Value Saved` notice, alerting you that your changes have been saved.

# 11 Load Balancing

EDB Ark uses pgPool functionality to implement automatic load balancing. Load balancing increases system performance by distributing client queries to replica nodes, while routing database modifications to the master node. Any modifications to the master node are subsequently propagated to each replica using Postgres streaming replication.

## *Utilizing Load Balancing*

By default, load balancing is enabled on an EDB Ark cluster. To utilize load balancing, you should direct client applications to connect to the load balancing port (by default, 9999). A cluster's load balancing port number is displayed in the `LBPORT` column on the `Details` pane of the `Clusters` tab of the Ark console.

pgPool may direct the following statement types to *either* a primary or a standby node:

- `SELECT` statements (not listed below)
- `COPY TO`
- `DECLARE`
- `FETCH`
- `CLOSE`
- `SHOW`
- `SET`
- `DISCARD`
- `DEALLOCATE ALL`

When deciding which node a query should be routed to, pgPool checks the transaction log number; if the transaction log number on the standby server is lower than the log number on the master, pgPool routes the statement to the master node. This helps to ensure that the data returned by the query is the most recent available.

In some cases, specific clauses within a query statement will signal pgPool to direct a statement to the master node. In other cases, the transaction type, or order of commands within a transaction can direct a statement to the master node. By default, the following transaction types will always be executed on the master node:

- `SELECT INTO`, `SELECT FOR UPDATE` or `SELECT FOR SHARE` statements
- `SELECT` statements within `SERIALIZABLE` transactions
- `SELECT` statements that follow an `INSERT` statement
- `SET SESSION CHARACTERISTICS AS TRANSACTION... READ WRITE` statements
- `SET transaction_read_only = off` statements
- `EXPLAIN` and `EXPLAIN ANALYZE SELECT` statements
- `START TRANSACTION... READ WRITE` statements

- LOCK commands that are stricter than ROW EXCLUSIVE MODE
- Transactions that start with a BEGIN statement
- The nextval() and setval() sequence functions
- Large objects creation commands

Please Note: If your application uses JDBC, and the autocommit option is set to false, the JDBC driver will include a BEGIN and COMMIT statement with each SELECT statement. To enable load balancing when using the JDBC driver, your application must include a call to setAutoCommit(true).

pgPool directs the following non-query statement types to the master node only:

- INSERT
- UPDATE
- DELETE
- COPY FROM
- TRUNCATE
- CREATE
- DROP
- ALTER
- COMMENT
- PREPARE TRANSACTION
- COMMIT PREPARED
- ROLLBACK PREPARED
- LISTEN
- UNLISTEN
- NOTIFY
- VACUUM

### ***Selectively Enforcing Load Balancing***

pgPool does not enforce load balancing for SELECT statements with a leading white space or leading comment. For example, the following statement would be directed to the master node:

```
/*Ignore load balancing*/ SELECT * FROM emp;
```

To enforce load balancing of SELECT statements with leading white space or comments, modify the pgpool.conf file, and set the ignore\_leading\_white\_space parameter to true.

You can also use the black\_list and white\_list parameters (located in the pgpool.conf file) to instruct pgPool to direct specific statements or functions to the master node. This is useful for cases where a SELECT statement (normally directed to a

replica) calls a function that in turn might modify the database, and so should be directed to the master.

### ***Monitoring Load Balancer Health***

By default, EDB Ark monitors the health of the load balancer to ensure that service is not interrupted. If the load balancer (pgpool) should fail while monitoring is enabled, PgPool will be automatically restarted. If the load balancer cannot be automatically restarted, EDB Ark will display a warning sign next to the cluster name on the `Details` panel and send a notification email to the cluster user.

Deselect the `Monitor Load Balancer Health` checkbox (located on the `Details` panel of the `Clusters` tab) to indicate that you do not wish for load balancer health to be monitored and automatically restarted if an interruption in service is detected.

## 12 Customizing Your Cluster

EDB Ark creates fully-functioning, high-availability database clusters of various sizes complete with replication, load balancing, connection pooling, backup and failover capabilities. An EDB Ark cluster can be defined in minutes without any special database knowledge or skills. This characteristic is greatly appreciated by application developers who want to create robust, data-intensive applications quickly, and who may not have the time, inclination, or skills to otherwise achieve the same results. This type of black box setup was designed to dramatically increase the productivity of developers, DBAs, and system administrators alike.

However, there are many users who, while enjoying the black box benefits described above, prefer to take a more hands-on approach to managing their databases. EDB Ark was also designed with these users in mind.

You can also use supporting components to extend the functionality of your EDB Ark cluster; the following sections provide an overview of how to add an extension to a new or existing cluster.

The EDB Ark Administrator's console provides an easy way to install and maintain the latest server-related packages. Talk to your system administrator about automatically including supporting components for your cluster when provisioning the database engine.

## 12.1 Adding an Extension to a New Cluster

Supporting components and utilities can extend the functionality of your Postgres cluster. For example, you may want to consider adding EDB Postgres Enterprise Manager for management, monitoring, and statistical analysis functionality, or PostGIS, to provide support for spatial data types and functions.

An administrative user can use the `Optional Node Packages` field on the `Add Engine` or `Edit Engine` dialog to modify a database engine definition, providing the names of optional rpm packages that will be installed (from the specified repository) during provisioning. All engines created with that definition will contain the new component; the component will be provisioned on each replica as well as on the master node. As each rpm is installed, yum will satisfy the dependencies for the new component.

Packages added via the `Optional Node Packages` field on the master node of the cluster will be provisioned on any standby nodes that are subsequently created. If the package requires manual configuration steps, you will be required to repeat those steps on each node of the cluster; package configurations will not be propagated to standby nodes. If you add a node through cluster operations (such as failover, scaling, or restoring a node from backup), any packages on the new node will also require manual configuration.

For information about modifying a database engine to add a supporting component, see the *EDB Ark Administrative User's Guide*.

# 13 Database Management

The sections that follow detail some of the tasks that are performed outside of the Ark console's graphical interface:

- Moving an existing database into an EDB Ark cluster
- Connecting a client application to a Postgres Server instance
- Manually modifying configuration parameters on a cluster
- Stopping and starting the server

Please note: To perform the tasks described in this section, your client application must have permission to connect to the cluster on port 22; an administrator must modify the security group of the cluster to permit connections.

## ***13.1 Connecting to the Cluster***

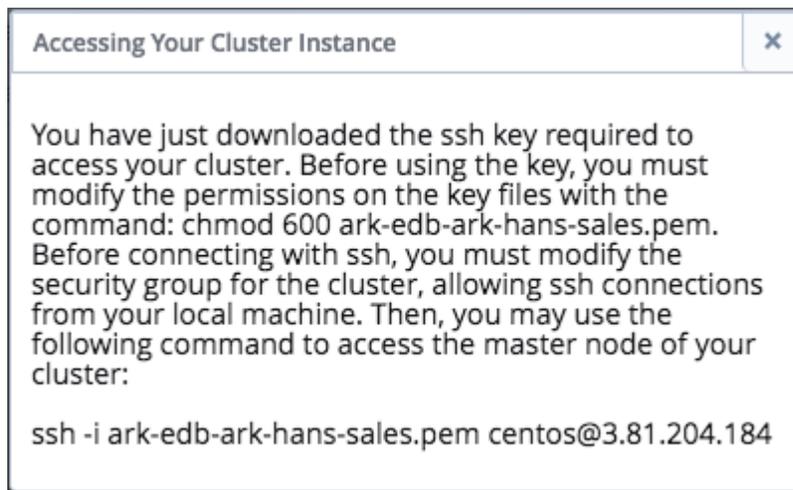
The following sections will walk you through the process of connecting to a node of an EDB Ark cluster using some of the client applications that are distributed with Advanced Server and PostgreSQL.

### 13.1.1 Using ssh to Access a Server

EDB Ark creates an `ssh` key when you create a new cluster; each cluster has a unique key. Before connecting to a Postgres instance that resides on the cloud via an `ssh` encrypted connection, you must download the `ssh` key, and adjust the privileges on the key file.



**Scale Machine Type** To download your private key, navigate to the `Clusters` tab, and click the `Download SSH Key` icon. The `Accessing Your Cluster Instance` popup opens (see Figure 13.1).



*Figure 13.1 – Accessing Your Cluster Instance.*

The popup displays the tenant name, the cluster name, the name that you should use when connecting to the cluster, and the IP address to which you should connect.

Before using the private key, you must modify the permissions on the key file. Use the following command to restrict file permissions:

```
chmod 0600 ssh_key_file.pem
```

Where `ssh_key_file.pem` specifies the complete path and name of the EDB Ark `ssh` private key file.

After modifying the key file permissions, you can use `ssh` to connect to the cluster. Include the complete path to the key file when invoking the command provided on the `Accessing Your Cluster Instance` popup.

After connecting via `ssh`, you can:

- Stop, start, or restart the Postgres server.
- Download and install Postgres extensions.
- Use the PostgreSQL Client Applications.
- Invoke PostgreSQL Server Applications.

Please note: Postgres Server applications must be invoked by the Postgres cluster owner (identified when creating an EDB Ark cluster as the `MasterUser`). If you are using a PostgreSQL server, the default user name is `postgres`; if you are using Advanced Server, the default user name is `enterprisedb`. To change your identity after connecting via `ssh`, use the `su` command:

```
# sudo su database_user_name
```

### 13.1.2 Connecting to EDB Ark with the psql Client

After connecting to a server hosted on EDB Ark with the `psql` client, you can invoke SQL commands or use meta-commands to:

- Execute queries
- Insert, update, and delete data
- Create and manage database objects (tables, indexes, views, etc.)
- Create user roles and manage privileges
- Review object and role attributes
- Invoke scripts containing complex (or simple) commands

By default, an EDB Ark cluster is only open to connections via port 9999 on the master node. Port 9999 is a good choice if you are connecting for the purpose of querying the database, but if you are modifying database objects, or performing administrative functions, you should connect directly to the server's listener port.

*Some administrative functions, if executed over port 9999, may be directed to the incorrect node of a multi-node cluster where they may not have the intended effect, or may return an invalid value.*

The listener port number is displayed in the `DBPORT` column of the `Details` panel of the `Clusters` tab.

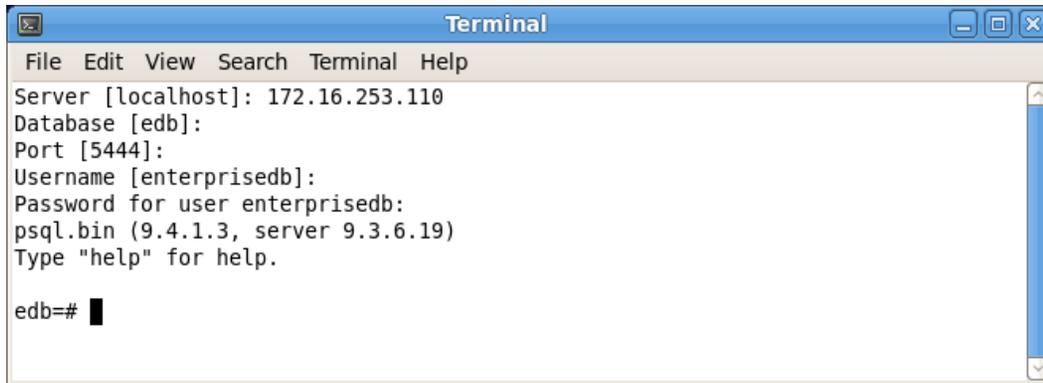
Before connecting to the server's listener port, an Ark administrator must modify the security group to allow connections from the host of your client application.

#### ***Connecting with psql From a Local Workstation***

After installing Advanced Server or PostgreSQL on a local workstation, you can use `psql` to perform administrative tasks on an EDB Ark cluster.

To open the `psql` client on an Advanced Server workstation, navigate through the `Applications (or Start) menu` to the `Postgres Plus Advanced Server menu`; then, open the `Run SQL Command Line menu`, and select `EDB-PSQL`.

To open a `psql` client on a PostgreSQL workstation, navigate through the `Applications (or Start) menu` to the `PostgreSQL menu`, and select `SQL Shell (psql)`.



```

Terminal
File Edit View Search Terminal Help
Server [localhost]: 172.16.253.110
Database [edb]:
Port [5444]:
Username [enterprisedb]:
Password for user enterprisedb:
psql.bin (9.4.1.3, server 9.3.6.19)
Type "help" for help.

edb=#

```

*Figure 13.2 – The psql command line utility.*

Provide connection information for the server to which you are connecting:

- When prompted for a `Server`, enter the IP address or DNS name of the EDB Ark server. The IP address is displayed in the `DNSNAME` column on the `Details` panel of the `Clusters` tab of the Ark console.
- When prompted for a `Database`, enter the name of the database to which you wish to connect. By default, an Advanced Server cluster is created with a database named `edb`; a PostgreSQL cluster is created with a database named `postgres`.
- When prompted for a `Port`, enter the port on which the server is listening. For database queries, you can use port `9999`; if you are modifying database objects or performing administrative functions, you should use the server's listener port (`5444` for an Advanced Server cluster, `5432` for a PostgreSQL cluster).
- When prompted for a `Username`, enter the role you wish to use when connecting to the server. The name of the database superuser is specified in the `Master User` field when defining an EDB Ark server cluster. By default, the Advanced Server database superuser is `enterprisedb`. The default superuser of a PostgreSQL database is `postgres`.
- When prompted for a `Password`, enter the password associated with that role. The database superuser's password is specified in the `Master Password` field when defining an EDB Ark server cluster.

After connecting, the prompt will display the name of the database to which you are connected (as shown in Figure 13.2).

***Invoking psql on an EDB Ark Server***

To use a copy of the psql client that resides on the EDB Ark host, first connect to the cluster using `ssh`:

```
ssh -i/path/ssh_key root@host_name
```

After connecting to the host, assume the identity of the database superuser (or a user with sufficient privileges to invoke the client). On an Advanced Server host, use the command:

```
sudo su enterprisedb
```

On a PostgreSQL host, use the command:

```
sudo su postgres
```

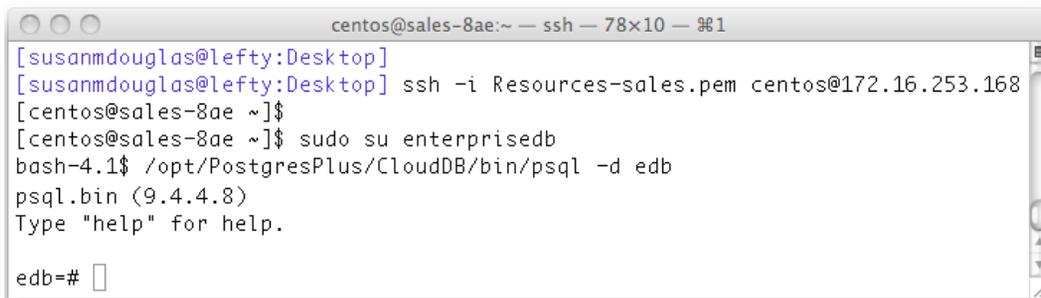
Then, invoke the psql client. On an Advanced Server host, use the command:

```
/usr/bin/edb-psql -d edb
```

On a PostgreSQL host, use the command:

```
/usr/bin/psql -d postgres
```

Include the `-d` option to specify the name of the database to which you wish to connect. The session opens as shown in Figure 13.3.



```
centos@sales-8ae:~ -- ssh -- 78x10 -- 1
[susanmdouglas@lefty:Desktop]
[susanmdouglas@lefty:Desktop] ssh -i Resources-sales.pem centos@172.16.253.168
[centos@sales-8ae ~]$
[centos@sales-8ae ~]$ sudo su enterprisedb
bash-4.1$ /opt/PostgresPlus/CloudDB/bin/psql -d edb
psql.bin (9.4.4.8)
Type "help" for help.
edb=#
```

*Figure 13.3 - A psql session on the EDB Ark host.*

To exit the `psql` client, enter `\q`.

For information about using `psql` and the `psql` meta-commands, please see the Postgres documentation at:

<http://www.enterprisedb.com/docs/en/11/pg/app-psql.html>

## 13.2 Moving an Existing Database into a New Cluster

You can use the Postgres `pg_dump` utility to migrate an existing Postgres database (schema, data, and associated database objects) into an EDB Ark cluster.

`pg_dump` creates an archive that contains the commands needed to re-create and populate your existing database. After moving the archive to the master node of the Ark cluster, use `pg_restore` to uncompress and play the SQL commands contained in the archive. The following section will walk you through the process of moving a database to EDB Ark using `pg_dump`.

You can also use the `pg_dumpall` utility to move an entire *Postgres* cluster (data, schema information, and roles) to EDB Ark; for detailed information about using `pg_dumpall`, please see the Postgres documentation at:

<http://www.postgresql.org/docs/11/static/app-pg-dumpall.html>

The following example assumes that you have provisioned an EDB Ark cluster and opened a port for SSH connections.

### Step One – Navigate into the directory that contains `pg_dump`

Open a terminal window on the system that contains your Postgres source database, assume the identity of the Postgres superuser, and navigate into the `bin` directory that resides under your Postgres installation directory.

On Advanced Server the path to the `bin` directory is:

```
/usr/ppas-9.x/bin
```

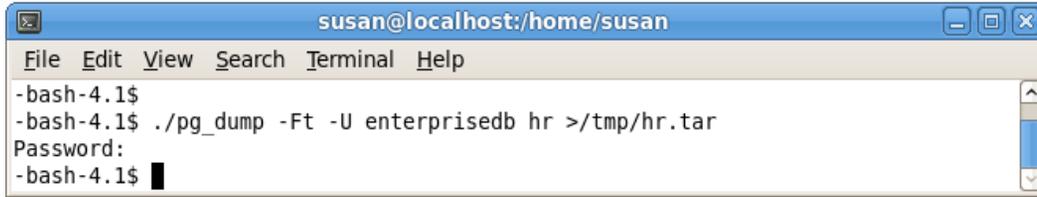
On PostgreSQL, the path to the directory is:

```
/usr/pgsql-9.x/bin
```

### Step Two - Create the `pg_dump` Archive

Use the `pg_dump` utility to create an archive that contains the commands required to recreate a database. When invoking `pg_dump`, include the `-Ft` flag to instruct `pg_dump` to format the output as a `tar` file, and the `-U` flag to specify the name of the database superuser (see Figure 13.4):

```
pg_dump -Ft -U db_superuser db_name > archive_name.tar
```



```
susan@localhost:/home/susan
File Edit View Search Terminal Help
-bash-4.1$
-bash-4.1$ ./pg_dump -Ft -U enterprisedb hr >/tmp/hr.tar
Password:
-bash-4.1$ █
```

Figure 13.4 - Creating the `pg_dump` archive.

Where:

`db_superuser` is the name of a Postgres database superuser.

`db_name` is the name of the database that you wish to move to EDB Ark.

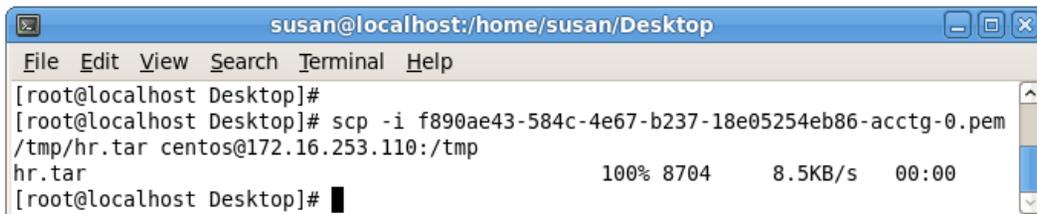
`archive_name.tar` is the complete path and name of the archive. Please note that you must have permission to write a file to the location specified.

If prompted, enter the password associated with the database superuser.

### Step Three - Move the Archive to EDB Ark

Use the `scp` command to copy the archive to the master server in the EDB Ark cluster; include the `-i` option to specify the location of your `ssh` key (see Figure 13.5):

```
scp -i ssh_key_file file_name user_name@host_name:target
```



```
susan@localhost:/home/susan/Desktop
File Edit View Search Terminal Help
[root@localhost Desktop]#
[root@localhost Desktop]# scp -i f890ae43-584c-4e67-b237-18e05254eb86-acctg-0.pem
/tmp/hr.tar centos@172.16.253.110:/tmp
hr.tar                               100% 8704      8.5KB/s   00:00
[root@localhost Desktop]# █
```

Figure 13.5 - Moving the archive to EDB Ark.

Where:

`ssh_key_file` specifies the pathname of the EDB Ark `ssh` private key file.

`file_name` specifies the archive name.

`user_name` specifies the name used to connect to the master node of the EDB Ark cluster.

*host\_name* specifies the hostname of the master node of the EDB Ark cluster; the hostname is located on the `Details` panel of the `Clusters` tab in the Ark console.

*target* specifies the name of the target directory on the EDB Ark host.

Including `:/tmp/` at the end of this command directs `scp` to copy the file to the `tmp` directory

## Step Four - Connect to EDB Ark with ssh

Use `ssh` to connect to your EDB Ark cluster master node. Provide the user identity of the operating system superuser, and the location of the `ssh` key (on your local host) in the command (see Figure 13.6):

```
ssh -i/path/ssh_key.pem root@host_name
```

Where:

*path* specifies the location of your EDB Ark `ssh` certificate on the system from which you are connecting.

*ssh\_key.pem* specifies the name of the EDB Ark `ssh` private key file.

*host\_name* specifies the hostname of the master node of the EDB Ark cluster; the hostname is located on the `Details` panel of the `Clusters` tab in the Ark console.

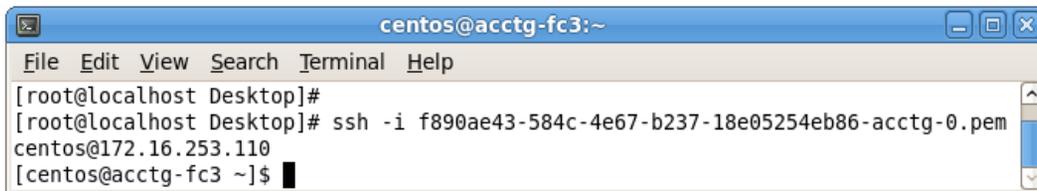


Figure 13.6 - Connecting to EDB Ark with ssh.

## Step Five – Navigate into the bin directory on the Ark Host

After connecting, assume the identity of the database superuser and navigate into the directory on the Ark host that contains the `pg_restore` utility (see Figure 13.7). On an Advanced Server host:

```
cd /opt/PostgresPlus/CloudDB/bin
```

On a PostgreSQL host:

```
cd /opt/PostgreSQL/CloudDB/bin
```

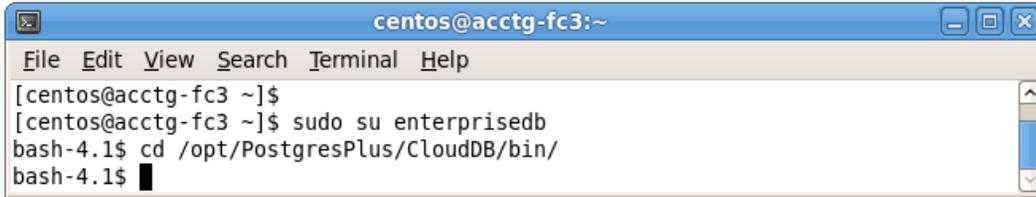


Figure 13.7 – Navigate into the bin directory.

### Step Six - Invoke `pg_restore` on the master server in the EDB Ark cluster

Before invoking the `pg_restore` utility, you must create the target database in the master server; you can use the `createdb` client utility at the command line to create the target:

```
createdb -U db_superuser database_name
```

Where:

*db\_superuser* specifies the name of the database superuser. On an Advanced Server cluster, the default is `enterprisedb`; on a PostgreSQL cluster, the default is `postgres`.

*database\_name* specifies the name of the database on EDB Ark.

Then, invoke the `pg_restore` utility:

```
pg_restore -Ft -U db_superuser /path/archive_name.tar -d
target_db_name
```

Where:

*db\_superuser* specifies the name of the database superuser. On an Advanced Server cluster, the default is `enterprisedb`; on a PostgreSQL cluster, the default is `postgres`.

*path* is the pathname to the archive on the Ark.

*archive\_name.tar* is the name of the archived database.

*target\_db\_name* is the name of the target database on the Ark.

Include:

the `-Ft` flag to specify that the file is an archive

the `-U` flag to specify the name of a database superuser.

the `-d target_db_name` flag to specify the name of the target database



```
centos@acctg-fc3:~
File Edit View Search Terminal Help
bash-4.1$
bash-4.1$ createdb -U enterprisedb hr
bash-4.1$ pg_restore -Ft -U enterprisedb /tmp/hr.tar -d hr
bash-4.1$
```

Figure 13.8 - Restoring the database.

### Step Seven - Confirm that the Move was Successful

After performing the restore, you can use the `psql` client to connect to the EDB Ark and confirm that the database has been transferred (see Figure 13.9):

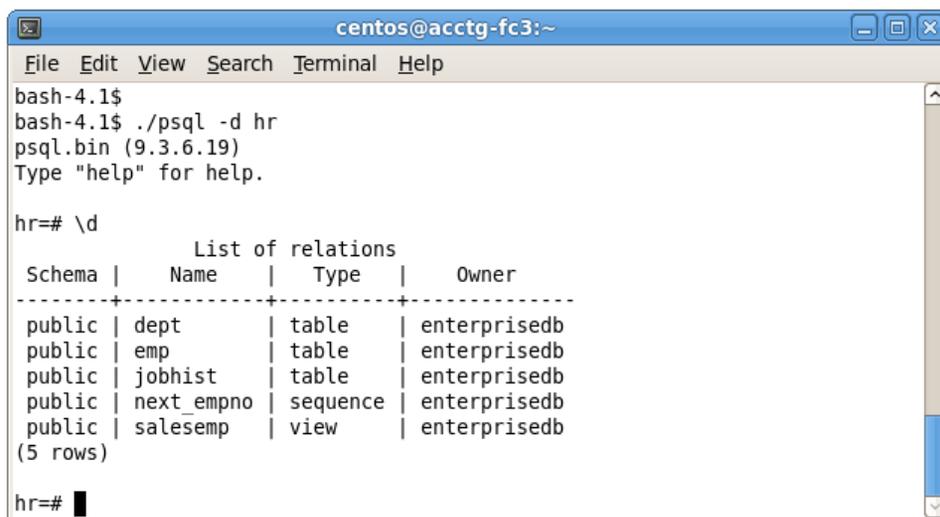
```
psql -U database_superuser -d target_db_name
```

Where:

`db_superuser` specifies the name of the database superuser. On an Advanced Server cluster, the default is `enterprisedb`; on a PostgreSQL cluster, the default is `postgres`.

`target_db_name` is the name of the target database.

Use the `\dt` command to view a list of database objects in the current database:



```
centos@acctg-fc3:~
File Edit View Search Terminal Help
bash-4.1$
bash-4.1$ ./psql -d hr
psql.bin (9.3.6.19)
Type "help" for help.

hr=# \d
          List of relations
Schema | Name      | Type      | Owner
-----+-----+-----+-----
public | dept      | table     | enterprisedb
public | emp       | table     | enterprisedb
public | jobhist   | table     | enterprisedb
public | next_empno | sequence  | enterprisedb
public | salesemp  | view      | enterprisedb
(5 rows)

hr=#
```

Figure 13.9 - Confirming that the move was successful.

To exit the `psql` client, enter `\q;`; to exit the `ssh` session, type `exit` and Return.

For more information about using the `psql` client, please see the tutorial, *Connecting to an EDB Ark*. You can access the tutorial through the `Dashboard` tab of the Ark console.

For more information about using PostgreSQL utilities to move an existing database into EDB Ark, please see the documentation at:

<http://www.postgresql.org/docs/11/static/backup-dump.html>

### 13.2.1 Using Migration Toolkit to Migrate to an Ark Cluster

Migration Toolkit is a powerful command-line tool that offers granular control of the migration process. Migration Toolkit can migrate immediately and directly into a Postgres database (*online migration*), or you can also choose to generate scripts to use at a later time to recreate object definitions in a Postgres database (*offline migration*).

If you are only migrating schema objects to a cluster, and use an `ssh` tunnel (with compression enabled), online migration of database object definitions may be a viable option. If you are migrating large amounts of data, network overhead may make an online migration prohibitively slow; Migration Toolkit's `-offlineMigration` option might provide a better migration path.

For more information and documentation for Migration Toolkit, please visit the EnterpriseDB website at:

<https://www.enterprisedb.com/products/edb-postgres-platform/edb-migration-toolkit>

EnterpriseDB also provides migration assistance. For more information, please visit the EnterpriseDB website at:

<https://www.enterprisedb.com/services>

### 13.3 Manually Modifying Configuration Files

Many of the features of a Postgres server may be influenced by settings specified in configuration files:

- The `postgresql.conf` file determines Postgres server behavior as it pertains to auditing, authentication, file locations, resource usage, query planning, statistic gathering, error handling and more.
- The `pg_hba.conf` file controls the type of authentication that should be used when a client application connects to an EDB Ark service. By default, the `pg_hba.conf` file is configured to require clients to provide a valid md5-encrypted password.
- The `pg_ident.conf` file contains user mappings for external authentication methods (like LDAP or GSSAPI). Each entry within the `pg_ident.conf` file maps an external user name to his corresponding Postgres user name.
- The `pgpool.conf` file determines the behavior of EDB Ark as it pertains to load balancing.

To modify a configuration file:

1. `ssh` to the node of the cluster that contains the file you wish to modify. For information about using `ssh` to connect to the server, see Section [13.1.1, Using ssh to Access a Server](#).
2. Use your choice of editor to modify the files.
3. Reload or restart the server. For detailed information about reloading the server, see Section [13.4, Controlling the Server](#).

When you add or remove nodes from a cluster, EDB Ark takes a backup of your `pg_hba.conf` and `pgpool.conf` configuration files. Configuration file backups are appended with the date that the backup was taken and a unique identifier; for example, `pg_hba.conf.20140319-140903` identifies a backup of the `pg_hba.conf` file.

When modifying a configuration file, you should make changes only to those files that *are not* appended with a timestamp and identifier.

### 13.3.1 Best Practices for Modifying Configuration Files

Please note that changing parameter settings can have unintended consequences, ranging from degraded performance to system crashes. Consequently, we recommend that only an advanced user who accepts these risks, and has experience with both Postgres and cloud environments modify parameter settings.

There are several ways that you can minimize the risks involved when making parameter changes:

- Always make a snapshot backup of your data before making parameter changes. For information about taking a backup, refer to Section 7, *Managing Backups and Recovery*.
- Always use a test cluster to test parameter changes, to ensure they have the intended effect before deploying them to your production environment. Create a test environment that mirrors the final target environment as much as possible - this is easy to accomplish by restoring a production backup into a similar size cluster as the original.
- Only change one parameter at a time (or as few as possible when dealing with interdependent settings) and monitor its effect until you are comfortable with the result.
- Make parameter changes on a *copy* of the existing configuration that is in use for the master or replicas. That way, if the parameter change proves detrimental, it will be easy for you to re-apply the original settings. Keep a backup of the original configuration, so they can be easily restored if necessary.

When adjusting parameters, be mindful of that fact that the master node in the cluster processes both read and write requests, while the replica nodes in the cluster accept only read requests. You can tune the master node and the replica nodes independently to quickly have an impact (either positive or negative) on your write or read performance.

For more information about modifying Postgres server parameters, please visit:

<http://www.postgresql.org/docs/11/static/runtime-config.html>

## 13.4 Controlling the Database Server

You can use your platform-specific service controller to control a Postgres database. The service name of the database server in an Ark cluster is `clouddb`.

### Controlling a Service on CentOS 7.x

If your cluster resides on CentOS version 7.x, you can use the `systemctl` command to control the service. The `systemctl` command must be in your search path and must be invoked with superuser privileges. To use the command, open a command line, and enter:

```
systemctl action clouddb
```

Where `action` specifies the action taken by the service command. Specify:

- `status` to discover the current status of the service.
- `start` to start the service.
- `stop` to stop the service.
- `restart` to stop and then start the service.

### Controlling a Service on CentOS 6.x

On CentOS version 6.x, you can control a service at the command line with the `service` command. The Linux `service` controller mechanism allows you to start and stop the server gracefully. The command must be in your search path and must be invoked with superuser privileges. Open a command line, and issue the command:

```
service clouddb action
```

Where `action` specifies the action taken by the service command. Specify:

- `status` to discover the current status of the service.
- `start` to start the service.
- `stop` to stop the service.
- `condstop` to stop the service without displaying a notice if the server is already stopped.
- `restart` to stop and then start the service.
- `condrestart` to restart the service without displaying a notice if the server is already stopped.
- `try-restart` to restart the service without displaying a notice if the server is already stopped.

### 13.5 Updating the Server Version on the EDB Ark Cluster

When an update becomes available for a package installed on your cluster, the Ark console will display an alert symbol in the `UP` column of the `Details` panel for the cluster, and in the `UP` column of the `DNSNAME` table adjacent to the node that requires an update (see Figure 13.10):

ADDRESS	AZ	SUBNET	LB PORT	DB PORT	CXN	VM	HA	DB	UP
ec2-54-84-223-141.cor	us-east-1e	subnet-02c188b6f2b970494	9999	5444	2	✓	✓	✓	⚠

Figure 13.10 – The `DNSNAME` table.

The overall cluster status (displayed in the top section of the `Clusters` tab) is based on the values of the nodes within the cluster.

- If all of the nodes within the cluster are up-to-date, the `UP` column displays a green checkmark.
- If one or more nodes require a non-critical update, the `UP` column displays a yellow alert symbol.
- If one or more nodes require a critical update, the `UP` column for the cluster displays a red error symbol.
- If one or more nodes have an unknown package status, the `UP` column for the cluster displays a grey checkmark.



You can use the `Upgrade` icon (located on the `Clusters` tab) to access a dialog that allows you to update the server version on each node within the cluster.

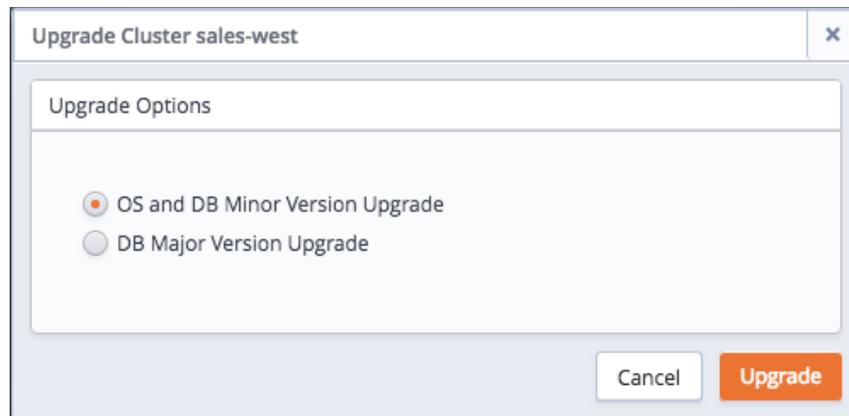


Figure 13.11 - The cluster upgrade dialog.

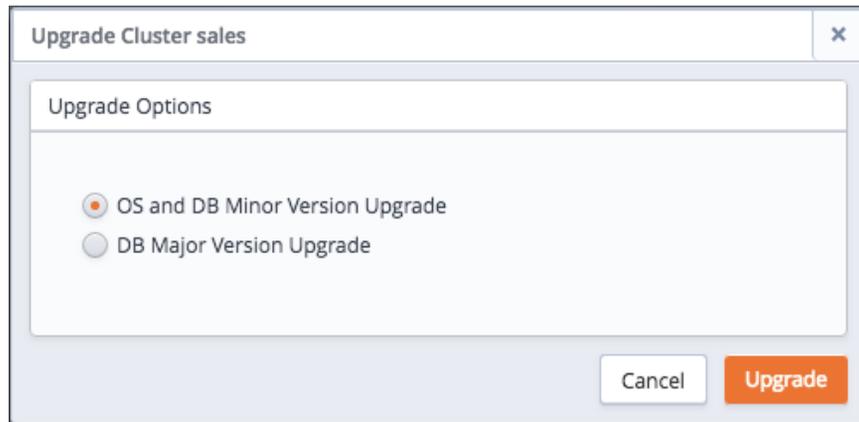
Select the radio button next to an option to:

- Select `OS and DB Minor Version Upgrade` to invoke a `yum update` command and update any outdated packages and perform a minor database version upgrade on each node of the cluster. For more information, see Section [13.5.1](#).
- Select `DB Major Version Upgrade` to select a version and perform a major version upgrade of the server. Please note that this functionality is restricted to users that are not required to use a template when deploying a cluster. For more information, see Section [13.5.2](#).

After making a selection, click `Upgrade` to continue.

### 13.5.1 Performing a Minor Version Upgrade

If you select the radio button next to OS and DB Minor Version Upgrade and click the Upgrade button, the Ark console will invoke the `yum update` command on each node of the cluster (see Figure 13.12). The `yum update` command will update all installed packages to the most recent version available of the same release (i.e., if you are running a 9.6 database server, yum will update your database server to the most recent version of 9.6).



*Figure 13.12 - The Upgrade Cluster dialog.*

Before performing the update, EDB Ark will perform a backup. During the upgrade process, all clients will be disconnected from the server. The updated server will retain the IP address used by the original server. When the update has completed, clients may once again connect.

After performing a `yum update`, the node will be rebooted, initiating any kernel updates required. When the update completes, EDB Ark will send an email notification that contains a list of the updated packages.

If one or more nodes in your cluster are currently displaying an unknown status, EDB Ark will display an error message. You must correct the problem that is causing the unknown status before EDB Ark can perform an update.

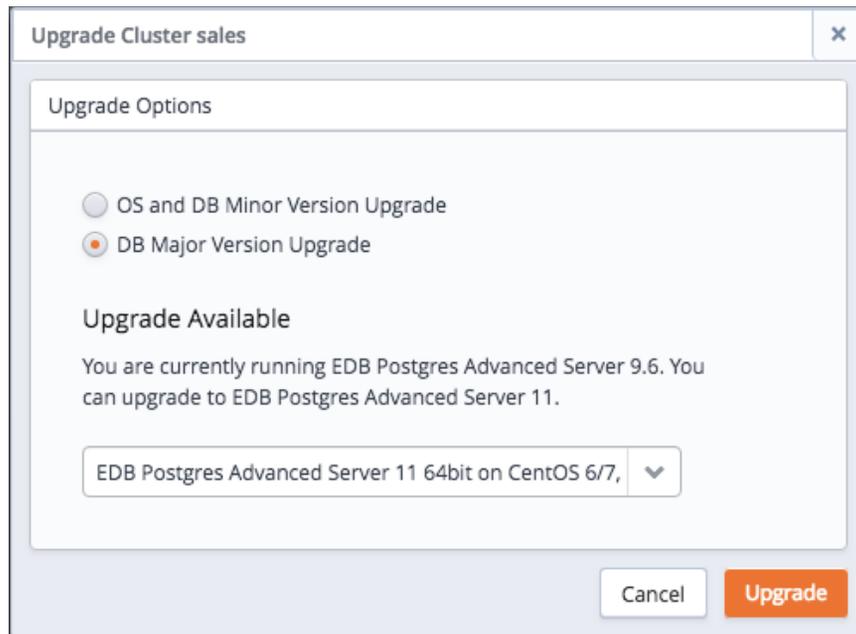
Please note that if the `yum update` command fails during the upgrade process, EDB Ark will terminate the process and `yum update` will not be run on any remaining nodes, leaving the cluster partially upgraded.

### 13.5.2 Performing a Major Version Upgrade

You can use the `Upgrade Cluster` dialog to upgrade the Postgres server installed on your Ark cluster; the upgrade must be to a more recent version of the same server type and must use the same server image as the current database engine. For example, you may upgrade an Advanced Server version 9.6 database server that resides on a CentOS 6.x host to Advanced Server 11, but you cannot move the server onto a CentOS 7.x host. Similarly, you may not upgrade a PostgreSQL 9.6 database server that resides on a CentOS 7.x host to use an Advanced Server 11 server on a CentOS 7.x host. The server type and host operating system version must remain the same. Please note:

- a major version upgrade may not be performed by a template-only user.
- if over half of the data space allocated to a cluster is used, you must add storage to the cluster before performing the upgrade.

To upgrade a running cluster, select the radio button next to `Major Version Upgrade`, and then use the drop-down listbox to select a server version. Click `Upgrade` to continue.



*Figure 13.13 - The Upgrade Cluster dialog.*

A popup will open, asking you to confirm that you wish to upgrade the server; click the `Upgrade` button to perform an upgrade. The server will be briefly unavailable during the upgrade process. The upgrade does not change the IP address and listening port of the server.

# 14 Troubleshooting

This section provides helpful troubleshooting information; if you still have unanswered questions after reviewing this section, you can also find solutions through EnterpriseDB:

If you have purchased support, you can log a support ticket:

in the Customer Portal: <http://www.enterprisedb.com/support>

via email: <mailto:support@enterprisedb.com>

or by phone: +1-732-331-1320 or 1-800-235-5891 (US Only)

If you have not purchased support, and would like to, view your support options at:

<http://www.enterprisedb.com/cloud-database/support>

You are always welcome to log an issue via email; when time permits, our customer support experts will respond to inquiries from customers that have not purchased support.

You can also find free help on a wide variety of topics in the EnterpriseDB User Forums, at:

<http://forums.enterprisedb.com/forums/show/21.page>

Postgres documentation and helpful tutorials are available from the EDB Ark bookshelf, located on the `Dashboard` tab of the management console.

## 14.1 Frequently Asked Questions

***Problem: Logging into the Console sometimes takes a long time.***

This can be attributed to delays in the connection time to the cloud provider. When you log in, the Console Manager must pass your credentials to the provider to log in; any delays at the service provider may slow your connection time.

***Problem: I am attempting to connect to my cluster, but don't know my default database name.***

- The name of the default database in an Advanced Server cluster is `edb`.
- The name of the default database in a PostgreSQL cluster is `postgres`.

***Problem: unable to connect to the load balancing port (9999).***

If you are having difficulty connecting to the load balancing port, you should:

- Make sure you are connecting to the master server's DNS name, rather than a replica's DNS name; the load balancer resides on the master node of an EDB Ark cluster.
- Make sure that your client application is providing an MD-5 encrypted password when attempting to connect to the load balancing port. The `username:password-md5` combination is stored in `pgpool_passwd.conf`, and is automatically updated when a user changes password, or when a new user is created.

***Problem: pgpool keeps issuing the following error:  
make\_persistent\_db\_connection:s\_do\_auth failed.***

pgpool attempts to connect to each node to perform replication lag checking. This happens unconditionally if pgpool is configured in a master-slave mode and streaming replication is being used (which is the case for EDB Ark). The pgpool community has been alerted to this behavior; please ignore these messages.

***Question: How do I stop the Postgres server on a cluster node without triggering a failover process?***

To safely stop a Postgres server without triggering failover, you can use either the `service` command or the `pg_ctl` utility. For more information, see Section [13.4](#).

***Problem: I am attempting to connect to my Advanced Server database with the psql client, and am getting the error:***

***(03/23/2012 13:36:53)->psql--host=192.0.43.10-p 9999 -U enterprisedb  
Password for user enterprisedb: psql: FATAL: database "postgres" does not exist***

The `psql` client expects the default database to be named `postgres`; the `edb-psql` client expects the default database to be named `edb`. If you attempt to connect to an Advanced Server cluster with the `psql` client without specifying the name of the database to which it should connect, the client will fail to connect.

You can include the `-d` or `--dbname` flag, followed by the database name when invoking either client to specify the database to which the client should connect.

***Question: I'm trying to drop a database from a cluster, but I am getting an error that there are open sessions. There are no clients connected. How can I terminate any leftover backend sessions?***

It may be that `pgpool` is retaining a connection to the database. You can use the `pg_cancel_backend()` or `pg_terminate_backend()` functions to selectively close connections to the database you wish to drop.

***Question: Why do I have to restart pgPool before it will recognize new users that I've added to the database server?***

`pgPool` does not check for new Postgres users. EDB Ark has a periodic update process that updates the user list every 20 seconds; if the update process identifies a new user, it sends a `reload` signal to the `pgPool` process. After the reload, `pgPool` will allow new users to login.

Instead of reloading, simply waiting for 20 seconds between the `CREATE USER` statement and the `CREATEDB` statement should solve the problem.

***Question: Why are scheduled backups not working?***

If you invoke the `pg_start_backup()` function before performing a manual backup your database, you must remember to invoke the `pg_stop_backup()` function when the backup has completed, or EDB Ark scheduled backups will fail.

## 14.2 The EDB Ark Email Notification System

EDB Ark invokes an email notification system that will alert you if your cluster changes or encounters a problem. Email notifications are sent to the address used to log in to the management console.

EDB Ark will send an email:

- When a new cluster is created.
- If a server stops (or is terminated).
- When a replica is added to a cluster.
- When memory is scaled up.
- When failover is invoked on a master or a replica.
- If a backup fails.
- If the password associated with your user account changes.

The `Notification Email` field (on the `User` tab) allows you to change the notification email associated with your user account; for more information, see Section [4.4](#), *The User Tab*.

# 15 AWS Policies

## *AWS Security Policy*

When you define a new Amazon role, you are required to provide a security policy. The following text is an example of a security policy:

```
{
  "Version": "2012-10-17",
  "Statement": [ {
    "Action": [
      "ec2:AllocateAddress",
      "ec2:AssignPrivateIpAddresses",
      "ec2:Associate*",
      "ec2:Attach*",
      "ec2:AuthorizeSecurityGroup*",
      "ec2:Copy*",
      "ec2:Create*",
      "ec2>DeleteInternetGateway",
      "ec2>DeleteNetworkAcl",
      "ec2>DeleteNetworkAclEntry",
      "ec2>DeleteNetworkInterface",
      "ec2>DeletePlacementGroup",
      "ec2>DeleteRoute",
      "ec2>DeleteRouteTable",
      "ec2>DeleteSecurityGroup",
      "ec2>DeleteSnapshot",
      "ec2>DeleteSubnet",
      "ec2>DeleteTags",
      "ec2>DeleteVolume",
      "ec2>DeleteVpc",
      "ec2>DeleteKeypair",
      "ec2:Describe*",
      "ec2:Detach*",
      "ec2:DisassociateAddress",
      "ec2:DisassociateRouteTable",
      "ec2:EnableVolumeIO",
      "ec2:GetConsoleOutput",
      "ec2:ModifyImageAttribute",
      "ec2:ModifyInstanceAttribute",
      "ec2:ModifyNetworkInterfaceAttribute",
      "ec2:ModifySnapshotAttribute",
      "ec2:ModifyVolumeAttribute",
      "ec2:ModifyVpcAttribute",
      "ec2:MonitorInstances",
      "ec2:ReleaseAddress",
      "ec2:ReplaceNetworkAclAssociation",
      "ec2:ReplaceNetworkAclEntry",
      "ec2:ReplaceRoute",
      "ec2:ReplaceRouteTableAssociation",
```

```

"ec2:ReportInstanceStatus",
"ec2:ResetImageAttribute",
"ec2:ResetInstanceAttribute",
"ec2:ResetNetworkInterfaceAttribute",
"ec2:ResetSnapshotAttribute",
"ec2:RevokeSecurityGroup*",
"ec2:RunInstances",
"ec2:StartInstances",
"ec2:UnassignPrivateIpAddresses",
"ec2:UnmonitorInstances"
],
"Resource": "*",
"Effect": "Allow",
"Sid": "Stmt1407961327680"
}, {
"Action": [
"iam:PassRole"
],
"Resource": "*",
"Effect": "Allow",
"Sid": "Stmt1407961362664"
}, {
"Action": [
"s3:CreateBucket",
"s3:Get*",
"s3:List*"
],
"Resource": "*",
"Effect": "Allow",
"Sid": "Stmt1407961630932"
}, {
"Action": [
"s3:Put*",
"s3:Get*",
"s3>DeleteObject*"
],
"Resource": "arn:aws:s3:::*",
"Effect": "Allow",
"Sid": "Stmt1407961734627"
}, {
"Condition": {
"StringEquals": {
"ec2:ResourceTag/CreatedBy": "EnterpriseDB"
}
},
"Action": [
"ec2:RebootInstances",
"ec2:StopInstances",
"ec2:TerminateInstances"
],
"Resource": "*",
"Effect": "Allow",

```

```
"Sid": "Stmt1407961927870"
}
]
}
```

### *AWS User Trust Policy*

When you define an Amazon role, you are required to provide a security policy. The following text is an example of a trust policy:

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "",
      "Effect": "Allow",
      "Principal": {
        "Service": "ec2.amazonaws.com"
      },
      "Action": "sts:AssumeRole"
    },
    {
      "Sid": "",
      "Effect": "Allow",
      "Principal": {
        "AWS": "arn:aws:iam::747919436152:root"
      },
      "Action": "sts:AssumeRole",
      "Condition": {
        "StringEquals": {
          "sts:ExternalId": "EDB-PPCD-CONSOLE"
        }
      }
    }
  ]
}
```