FreeZTP

A Zero-Touch Provisioning system built for Cisco Catalyst switches.

VERSION

The version of FreeZTP documented here is: v0.9.1 (beta)

TABLE OF CONTENTS

- 1. What is FreeZTP
- 2. Requirements
- 3. Installation
- 4. Getting Started
- 5. Terminology
- 6. ZTP Process
- 7. Command Interface
- 8. DHCP Functionality
- 9. Contributing

WHAT IS FREEZTP

FreeZTP is a dynamic TFTP server built to automatically configure Cisco Catalyst switches upon first boot (Zero-Touch Provisioning). FreeZTP does this using the 'AutoInstall' feature built into Cisco IOS and automatically enabled by default. FreeZTP configures switches with individual, templatized configurations based upon the unique ID of the switch (usually the serial number).

REQUIREMENTS

OS: Tested on CentOS 7, Ubuntu 16, and Raspbian Stretch Lite

Interpreter: Python 2.7.5+

INSTALLATION

The installation of FreeZTP is quick and easy using the built-in installer. Make sure you are logged in as root or are able to sudo su to install and operate FreeZTP.

- Install OS with appropriate IP and OS settings and update to latest patches (recommended). Check out the below links for easy Post-Install processes for OS's supported by FreeZTP.
 - CentOS 7: CentOS Minimal Server Post-Install Setup
 - Make sure to install Git for a CentOS instal
 - sudo yum install git -y
 - Ubuntu 16: Ubuntu Minimal Server Post-Install Setup
 - Make sure to install python-pip and git for Ubuntu
 - sudo apt install -y python-pip
 - sudo apt-get install -y git
 - Raspbian: Raspbian Minimal Server Post-Install Setup
 - Make sure to install python-pip and git for Raspbian
 - sudo apt install -y python-pip
 - sudo apt-get install -y git
- 2. Download the FreeZTP repository using Git
 - git clone https://github.com/convergeone/freeztp.git
- 3. Change to the directory where the FreeZTP main code file (ztp.py) is stored: cd freeztp
- 4. Run the FreeZTP program in install mode to perform the installation: python ztp.py install. Make sure the machine has internet access as this process will download and install several packages for this to happen.
 - FreeZTP will perform the install of the packages and services for full operation.
 - The installation will also install a CLI helper script. You will need to logout and log back into your SSH session to activate this helper script.

GETTING STARTED

The ZTP server comes with an [almost] fully functional default configuration, ready to serve out a basic config to switches.

The only part missing on the configuration is an IP lease range for DHCP. You will need to add this IP range in order to enable the DHCP service to hand out IP addresses (see below instructions). After this range is added, you can connect the ZTP server directly to the switch (on any of its ports), power on the switch, and watch it go!

- 1. Configure DHCP using the ZTP commands
 - During installation, ZTP will install a DHCP server, detect the network interfaces in Linux, and configure DHCP scopes for each of the interfaces. The created DHCP scopes will be inactive to serve DHCP as they will have no addresses available to lease.
 - If you want to use the automatically generated DHCP scope (the new switches will be on the same VLAN as one of FreeZTPs interfaces), you just need to specify a first and last address for the lease range. After configured, you will need to commit the ZTP DHCP configuration. Below is example of how to do this. ztp set dhcpd INTERFACE-ETH0 first-address 192.168.1.100 ztp set dhcpd INTERFACE-ETH0 last-address 192.168.1.200 ! ztp request dhcpd-commit
 - If the switches will not be on the same VLAN, then create a new scope.
 - There are other basic DHCP options included in the scope settings like dns-servers, domain-name, and gateway.

2. Start configuring switches!

- FreeZTP comes with a default configuration which is ready to configure switches. A
 default-keystore is configured which will hand out a basic (non-individualized) config
 to a newly booted switch.
- There are a few example templates, keystores, associations, an ID array already in the config. Feel free to modify them to do what you want, or blow them away and customize everything.

TERMINOLOGY

Due to the unique nature of how FreeZTP works and performs discovery of switches, there are a few terms you will need to know to understand the application.

Template

- FreeZTP relies on the Jinja2 templating standard to take a common Cisco IOS configuration and templatize it: creating variables (with the {{ i_am_a_variable }} syntax) in the template where unique values can be inserted for a specific switch upon a configuration pull.
- FreeZTP uses two different template types: the 'initial-template', and the custom named final templates. The initial-template is used to set the switch up for discovery, the named (final) templates are used to push the final configuration once the discovery is complete and the switch has been identified (this will make more sense in the ZTP Process section). You will most likely never need to change the initial-template. It has a default configuration that will most likely work for you. You will definitely be changing the named templates to fit the configurations you want your switches to have.

Template Example Config

ztp set template SHORT_TEMPLATE ^ hostname {{ hostname }} ! interface Vlan1
ip address {{ vl1_ip_address }} 255.255.255.0 no shut ! end ^

Keystore

The counterpart to the template (specifically: named templates) is the keystore. The
keystore is the part of the ZTP configuration which holds the unique configuration
values for specific switches (or for many switches). The keystore provides those
values for the merge of the final-template once the switch has been identified by the
discovery process.

Keystore ID

- A Keystore ID is the named identifier for a specific store which holds a set of keyvalue pairs.
 - ie "SOMEID" in: ztp set keystore SOMEID hostname SOMEDEVICE

Keystore Key

- A Keystore Key is the key side of a certain key-value pair which resides under a named Keystore ID.
 - ie "hostname" in: ztp set keystore SOMEID hostname SOMEDEVICE

Keystore Value

- A Keystore Value is the value side of a certain key-value pair which resides under a named Keystore ID.
 - ie "SOMEDEVICE" in: ztp set keystore SOMEID hostname SOMEDEVICE

Keystore Hierarchy

■ The hierarchy of the Keystore works as follows: A Keystore ID can contain multiple (unique) keys, each key with a different value. The Keystore can contain multiple IDs, each with its own set of key-value pairs.

Keystore Example Config

ztp set keystore STACK1 vl1_netmask 255.255.0 ztp set keystore STACK1
vl1_ip_address 10.0.0.200 ztp set keystore STACK1 hostname CORESWITCH

ID Arrays

- An ID Array is a method of mapping one or more Real switch IDs (ie: serial numbers)
 to a specific keystore. Multiple Real IDs can be mapped to the same Keystore ID,
 which comes in handy when building a configuration for a switch stack (which could
 take on the serial number of any of the member switches when it boots up).
- The ID array has two pieces:
 - The **Array Name** is the name of the specific array. The Array Name must match a Keystore ID in order to pull values from that keystore.
 - The **Array ID List** is a list of Real switch IDs (serial numbers) which, when searched for, will resolve to the Array Name before mapping to a Keystore ID. When configuring an IDArray in the CLI, each ID in the list is separated by a space.

ID Array Example Config

ztp set idarray STACK1 SERIAL1 SERIAL2 SERIAL3

Associations

- An association is a configuration element which maps a keystore to a named template. An association is required for each keystore in order to tell FreeZTP which template to use to do the merge when using certain keystore.
- Association Example Config

ztp set association id STACK1 template LONG_TEMPLATE

ZTP PROCESS

FreeZTP relies on the 'AutoInstall' function of a Cisco Catalyst switch to configure the switch upon first boot. The process followed to configure the switch is outlined below.

The new switch should have one of its ports connected to a network (likely an upstream switch) which has the FreeZTP server accessible. The FreeZTP server can be on the same VLAN as the new switch (so it can serve up DHCP addresses directly) or on a different VLAN which has a gateway and an IP helper pointed at the FreeZTP server so it can serve up DHCP.

1. STEP 1 - POWER ON: Initial boot up and DHCP leasing

- NOTE: Once the operating system is loaded on the switch and it completes the boot-up process, it will start the AutoInstall process
- Step 1.1: The switch will enable all of its ports as access ports for VLAN 1.
- **Step 1.2:** The switch will enable interface (SVI) Vlan1 and begin sending out DHCP requests from interface Vlan1.
- **Step 1.3:** The switch will get a DHCP lease from the ZTP server or from a different DHCP server. The lease will contain DHCP option 150 (TFTP Server) which points at the IP of the ZTP server.
- **Step 1.4:** To upgrade, or not to upgrade:
 - IF DHCP option 125 was configured (ztp set dhcpd SCOPENAME imagediscoveryfile-option enable) and that option is handed to the switch in its DHCP lease, then the switch will proceed to Step 2.
 - IF DHCP option 125 was not configured (ztp set dhcpd SCOPENAME imagediscoveryfile-option disable), the switch will proceed to **Step 3**.

2. STEP 2 - IOS Upgrade: The imagediscoveryfile is used to discover the IOS bin file

 NOTE: DHCP Option 125 will contain (in hex form) the name of the imagediscoveryfile setting ("freeztp_ios_upgrade" by default in the ZTP configuration) which is a fictitious file containing the name of the .bin or .tar file the switch needs to download for the upgrade.

- **Step 2.1:** The switch will send a TFTP request to ZTP requesting imagediscoveryfile ("freeztp_ios_upgrade" by default).
 - Step 2.1.1: FreeZTP will check the file download log (seen by using ztp show
 downloads) to see if the "freeztp_ios_upgrade" file has been downloaded by that IP
 address within the image-supression timeframe (set with set image-supression
 <seconds-to-supress>). This time-saving feature prevents some switch models from upgrading their IOS, automatically rebooting, then attempting the upgrade again after a reboot (which results in the switch downloading the IOS image a second time, just to abort the upgrade since the software is the same version).
 - If a valid suppression entry is found, then ZTP will return the "freeztp_ios_upgrade" with a bogus value; causing the switch to fail the IOS download and move on to configuration downloads in Step 3.
- **Step 2.2:** FreeZTP will check its "imagefile" (ztp set imagefile someIOSfile.bin) setting and dynamically generate a "freeztp_ios_upgrade" file containing the name of that .bin or .tar file. This "freeztp_ios_upgrade" file is then sent to the switch to be downloaded.
- **Step 2.3:** The switch reads the file and determines what .bin or .tar file it should download as its upgrade image. Once determined, the switch sends a TFTP download request to ZTP for that .bin or .tar filename .
- **Step 2.4:** If the .bin or .tar file does not exist, the switch abandons the upgrade attempt and proceeds to **Step 3**. If the .bin or .tar file does exist, then the ZTP server allows the switch to download it with TFTP.
- **Step 2.5:** Once fully downloaded, the switch will install the image and upgrade itself. Depending on the switch model, it may or may not automatically reboot itself. After the upgrade, the switch will continue through the ZTP process.

3. STEP 3 - INITIAL-CONFIG: An initial config is generated, sent, and loaded for switch (target) discovery

- Step 3.1: The switch will send a TFTP request for a file named "network-confg" to the IP address specified in the DHCP option 150 (which should be the ZTP server).
- **Step 3.2:** When the request for the "network-confg" file is received by the ZTP server, it generates the config by performing an automatic merge with the initial-template:
 - Step 3.2.1: The {{ autohostname }} variable in the initial-template is filled by an automatically generated hexadecimal temporary name (example: ZTP-22F1388804). This temporary name is saved in memory by the ZTP server for future reference because the switch will use it's temporary hostname to request a new TFTP file in a later step.
 - **Step 3.2.2:** The SNMP {{ community }} variable is filled with the value set in the community configuration field
- Step 3.3: This merged configuration is passed to the Cisco switch as the "network-confg"

file. The switch loads it into its active running-config and proceeds to Step 5

 NOTE: You can see an example initial configuration from the ZTP server by issuing the command ztp request initial-merge

4. STEP 4 - SNMP DISCOVERY: The ZTP server discovers the switch's "Real ID" (ie: serial number) using SNMP

- **Step 4.1:** After the initial config file is passed to and loaded by the switch, the ZTP server initiates a SNMP discovery of the switch's serial number, or "Real ID"
 - Step 4.1.1: The SNMP requests target the source IP of the switch which was used to originally request the "network-confg" file in Step 3.1
 - **Step 4.1.2:** The SNMP requests use the value of the community configuration field as the authentication community (which the switch should honor once it loads the configuration from the "network-confg" file)
 - **Step 4.1.3:** The SNMP requests use the OIDs from the snmpoid configuration field. The FreeZTP default configuration comes with a few different OIDs pre-configured for some popular switch models.
 - NOTE: You may need to add an OID based on the switch model you are discovering. You can test the configured OIDs for returned values using the following command. Your switch will need to be accessible and ready to accept the ZTP configured community ztp request snmp-test <ip_address>
 - Step 4.1.4: Once the SNMP query succeeds, the ZTP server maps the Real ID (ie: serial number) of the discovered switch to its temporary hostname generated in Step 3.2.1

5. STEP 5 - FINAL CONFIG REQUEST: The switch requests the final configuration file and the ZTP server generates it based on the ZTP configuration

- **Step 5.1:** After the switch loads the "network-confg" file into its running-config, it sends out a new TFTP request to the ZTP server for a new configuration file. The file name for the new TFTP request is based upon the hostname passed to the switch in the initial ("network-confg") file (example filename: "ZTP-22F1388804-confg") from **Step 3.2.1**.
- Step 5.2 (FIND A KEYSTORE ID): ZTP attempts to find a usable Keystore ID to create the final configuration:
 - Step 5.2.1 (USING THE REAL ID): ZTP uses the requested filename (example filename: "ZTP-22F1388804-confg") to look up the Real ID (serial number) of the requesting switch (it was saved in Step 3.2.1). If the Real ID of the requesting switch is known, the ZTP server attempts to use that ID to find a suitable Keystore ID:
 - Step 5.2.1.1: The Real ID of the switch is used to search through all of the Keystore IDs to see if one of them matches the Real ID. If a Keystore ID matches,

- then the server proceeds to **Step 5.3** with that Keystore ID.
- Step 5.2.1.2: If there is no match between the Real ID and a Keystore ID, then the server looks to the ID Arrays for a match. It searches through the ID list in each IDArray, once a match is found, the server resolves the Real ID to the IDArray Name and re-searches the Keystore IDs for a match using the resolved IDArray name. Once a match is found, the server continues to Step 5.3 with the matched Keystore ID.
- Step 5.2.2 (USING THE DEFAULT KEYSTORE): If ZTP was unable to determine the ID of the switch, or the ID of the switch does not match either a Keystore ID or an ID Array, then ZTP will look to see if a default Keystore ID has been configured using the default-keystore setting. If a default Keystore ID is set, and that Keystore ID is actually configured with at least one key/value pair, then ZTP will continue on through the process using that Keystore ID.
 - NOTE: If the default-keystore is set to None, or the default-keystore name does not actually exist as a configured Keystore ID, then ZTP will send a "no such file" failure message to the switch as a response to the TFTP request
 - NOTE: You can test the default-keystore configuration by issuing the command ztp request default-keystore-test
- Step 5.3 (FIND THE ASSOCIATED TEMPLATE): Once a candidate Keystore ID is found, the server checks to see if an association exists in the ZTP configuration to associate the Keystore ID with a template. It will then use the associated template to perform the Jinja2 merge of the final configuration.
 - NOTE: If no association exists for the Keystore ID, or an association exists, but the
 associated template name doesn't match any configured template, then ZTP will send
 a "no such file" failure message to the switch as a response to the TFTP request
- Step 5.4 (COMPLETE THE FINAL CONFIG): After the matching keystore and an associated template have been found, the ZTP server will perform the Jinja2 merge between the template and the key/value pairs in the Keystore ID. This configuration is then passed to the switch in response to its TFTP request made in Step 5.1.
 - NOTE: You can see this merged configuration by issuing the command ztp request merge-test <keystore-id>
 - NOTE: If you configured static IP addresses in the final-template, the switch will then start using those static IPs and can be remotely accessible via them (assuming you also included config for AAA and SSH)
 - NOTE: The switch does not save the new configurations into its startup-config. That has to be done manually

Ladder Diagram

SWITCH -----> Step 2.1: File "freeztp_ios_upgrade" requested -----> ZTP Server

SWITCH <---- Step 2.2: Auto-generated "freeztp_ios_upgrade" file sent to switch <-- ZTP Server

SWITCH -----> Step 2.3: .bin or .tar file requested ------> ZTP Server

SWITCH <----- Step 2.4: .bin or .tar file sent to switch if it exists <------ ZTP Server

SWITCH -----> Step 3.1: File "network-confg" requested ------> ZTP Server

SWITCH <----- Step 3.3: Auto-generated initial config passed to switch <----- ZTP Server

SWITCH <----- Step 4: ZTP server performs discovery of Real ID using SNMP <----- ZTP Server

SWITCH -----> Step 5.1: Switch requests new file based on new hostname ------> ZTP Server

SWITCH <-----> Step 5.4: ZTP responds to TFTP request with final config <------ ZTP Server

COMMAND INTERFACE

The FreeZTP service runs in the background as a system service. All commands to the FreeZTP service start with <code>ztp</code> at the command line. For example: you can check the status of the background service using the command <code>ztp</code> show status, you can check the current configuration of the ZTP server with the command <code>ztp</code> show <code>config</code>.

The command interface is fully featured with helpers which can be seen either by hitting ENTER with an incomplete command in the prompt, or by using the TAB key to display available options/autocomplete the command (similar to a Cisco IOS command line, but without the use of the question mark).

All commands which change the ZTP configuration use the set or clear arguments. Commands issued with the set argument will overwrite an existing configuration item if that item already exists. The clear argument allows you to remove configuration items.

The initial and final template configurations are entered as multi-line text blocks. To facilitate this, you must specify a delineation character in the set command. As an example, you will

issue the command <code>ztp set template MY_TEMPLATE ^</code> where the carat (^) character is set as the delineation character. After that command is issued, you can paste in the multi-line Cisco IOS template text. Once finished, enter that delineation character (^ in this case) on a line by itself to exit the text block entry mode.

Below is the CLI guide for FreeZTP. You can see this at the command line by entering ztp and hitting ENTER (after installation).

ARGUMENTS	
- run	Run the ZTP main
	Run the ZTP insta
- upgrade 	Run the ZTP upgra
- show (config run) (raw)	Show the current
- show status	Show the status o
- show version	Show the current
- show log (tail) (<num_of_lines>)</num_of_lines>	Show or tail the
- show downloads (live)	Show list of TFTF
- show dhcpd leases (current all ra w) 	Show DHCPD leases
	YOU PROBABLY SHOULDN'T
- set suffix <value></value>	Set the file name
- set initialfilename < value >	Set the file name
- set community < value >	Set the SNMP comm
- set snmpoid <name> <value></value></name>	Set named SNMP 03
- set initial-template <end_char></end_char>	Set the initial of
<pre>- set tftproot <tftp_root_directory></tftp_root_directory></pre>	Set the root dire
- set imagediscoveryfile <filename></filename>	Set the name of t
- set file-cache-timeout <timeout></timeout>	Set the timeout 1
<pre>- set template <template_name> <end_char></end_char></template_name></pre>	Create/Modify a r
- set keystore < id /arrayname> <keyword> <value></keyword>	Create a keystore
- set idarray <arrayname> <id_#1> <id_#2></id_#2></id_#1></arrayname>	Create an ID arra
<pre>- set association id <id arrayname=""> template <template_name></template_name></id></pre>	Associate a keyst
- set default -keystore (none keystore- id)	Set a last-resort
<pre>- set imagefile <binary_image_file_name></binary_image_file_name></pre>	Set the image fil
<pre>- set image-supression <seconds-to-supress></seconds-to-supress></pre>	Set the seconds t
- set dhcpd <scope-name> [parameters]</scope-name>	Configure DHCP sc
- clear template <template_name></template_name>	Delete a named co
- clear keystore < id > (all <keyword>)</keyword>	Delete an individ
- clear idarray <arrayname></arrayname>	Delete an ID arra
- clear association < id /arrayname>	Delete an associa
- clear dhcpd <scope-name></scope-name>	Delete a DHCP sco
- clear log	Delete the loggi r

```
- request merge-test <id>
                                                                Perform a test ji
request initial-merge
                                                                See the result of
- request default-keystore-test
                                                                Check that the de
- request snmp-test <ip-address>
                                                             | Run a SNMP test u
- request dhcp-option-125 (windows|cisco)
                                                                Show the DHCP Opt
request dhcpd-commit
                                                             | Compile the DHCP
request auto-dhcpd
                                                             | Automatically det
- request ipc-console
                                                              | Connect to the IP
                                                             | Start, Stop, or R
- service (start|stop|restart|status)
- version
                                                              | Show the current
```

The following is the default configuration seen on the ZTP server after installation when doing a ztp show config.

```
#
#
#
ztp set suffix -confg
ztp set initialfilename network-confg
ztp set community secretcommunity
ztp set tftproot /etc/ztp/tftproot/
ztp set imagediscoveryfile freeztp_ios_upgrade
ztp set file-cache-timeout 10
ztp set snmpoid WS-C2960 SERIAL NUMBER 1.3.6.1.2.1.47.1.1.1.1.1.1001
ztp set snmpoid WS-C3850_SERIAL_NUMBER 1.3.6.1.2.1.47.1.1.1.1.11.1000
ztp set initial-template ^
hostname {{ autohostname }}
snmp-server community {{ community }} RO
end
#
#
#
#
```

```
#
ztp set template SHORT_TEMPLATE ^
hostname {{ hostname }}
interface Vlan1
ip address {{ vl1_ip_address }} 255.255.25.0
no shut
Ţ
end
#
ztp set template LONG_TEMPLATE ^
hostname {{ hostname }}
interface Vlan1
ip address {{ vl1_ip_address }} {{ vl1_netmask }}
no shut
ip domain-name test.com
username admin privilege 15 secret password123
aaa new-model
aaa authentication login CONSOLE local
aaa authorization console
aaa authorization exec default local if-authenticated
crypto key generate rsa modulus 2048
ip ssh version 2
line vty 0 15
login authentication default
transport input ssh
line console 0
login authentication CONSOLE
end
^
#
ztp set keystore MY_DEFAULT vl1_ip_address dhcp
ztp set keystore MY_DEFAULT hostname UNKNOWN_HOST
```

DHCP FUNCTIONALITY

FreeZTP installs a DHCP service during the install. This DHCP service is used to serve IP addresses to switches with the appropriate options included.

FreeZTP commands can be used to fully configure the DHCP server. Scopes and options are created using the syntax <code>ztp set dhcpd SCOPENAME <option> <value> .</code>

FreeZTP automatically configures one or more scopes for you upon installation based on the interfaces detected in Linux and what IP addresses are on them. These scopes are needed to instruct the DHCP service to listen on those interfaces for DHCP requests. If you plan to deploy switches on the same VLAN as the FreeZTP server, then you can just add a few options to the auto-generated scope so it is ready to serve IP addresses. The installation instructions show how to do this.

After any configuration changes to the DHCP scopes, you will need to run the command <code>ztp</code> request <code>dhcpd-commit</code> to instruct ZTP to convert the scope settings, write them to the DHCP config file, and restart the DHCP service so the new settings take effect.

You can check on the status of the DHCP server using the command ztp show status

If at any point you have botched up your DHCP scopes and the DHCP service will not start back up, just delete all your scopes (using <code>ztp clear dhcpd</code> commands), and run the <code>ztp</code> request <code>auto-dhcpd</code> command. This will rerun the DHCP discovery and auto scope creation. Then you will just need to do a <code>ztp request dhcpd-commit</code> to commit the changes and restart the service.

It is possible to use an external DHCP server instead of the FreeZTP one, but you will have to manually configure option 150 (for TFTP service from FreeZTP's IP), and option 125 (to specify the IOS image discovery file). Option 150 will need to contain the IP address of the ZTP server. You can get some instructions on how to configure option 125 by running the command <code>ztp</code> request <code>dhcp-option-125</code> <code>cisco</code> or <code>ztp</code> request <code>dhcp-option-125</code> windows .

CONTRIBUTING

If you would like to help out by contributing code or reporting issues, please do!

Visit the GitHub page (https://github.com/convergeone/freeztp) and either report an issue or fork the project, commit some changes, and submit a pull request.