



Deploying MongoDB Sharded Clusters with OpenStack, Terraform, Kubernetes and Helm

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Cloud & Big Data Technologies

Agenda

1. Introduction
2. Motivation
3. MongoDB
4. Initial Concept
5. Implementation
 - Kubernetes
 - MongoDB
 - Helm
 - Terraform
6. Tough nuts to crack
7. Example Application Twutter
8. Appendix: MongoDB Load Testing

Introduction

Introduction



Goal: Production-ready, distributed MongoDB sharded cluster



Focus: Automated deployment, data distribution, high availability



Tools: MongoDB, Kubernetes, Helm, Terraform, OpenStack



No pre-made Helm Chart: We want to create our own configuration

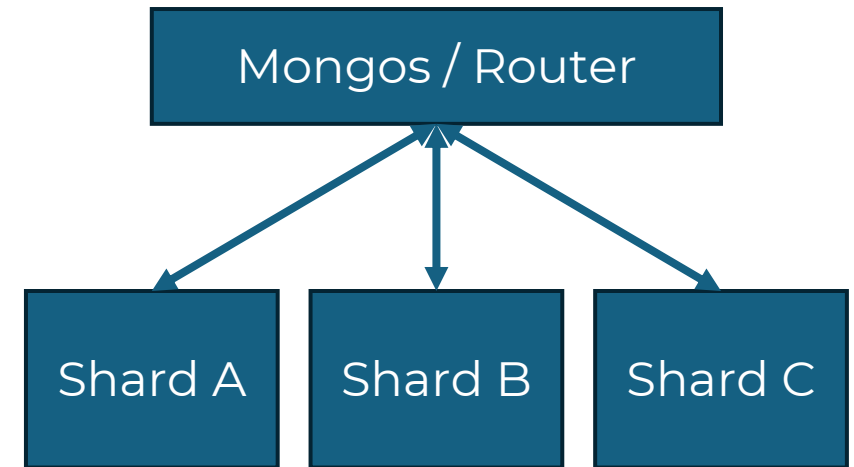


Example-App: „Twutter“ as a realistic test environment

Motivation

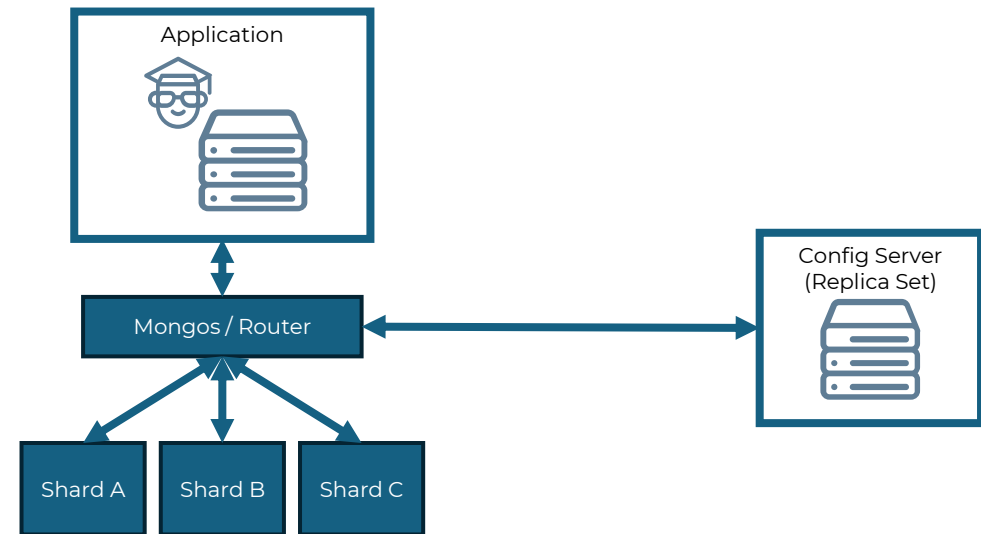
Motivation - Why a distributed database?

- **Data too large:** No longer fits on a single machine
- **Slow response times:** The database becomes a bottleneck
- **Scalability:** Scale horizontally instead of just upgrading hardware
- **Learning goal:** Understand sharding and failover in a cloud environment
- **Cloud deployment:** Use Terraform and Kubernetes to distribute data on CloudStack
- **Leverage CloudStack features:** Apply real infrastructure capabilities
- **Learn data distribution:** Understand how data is actually spread across shards
- **Kubernetes experience:** Explore and experiment as much as possible



Motivation - Cluster Architecture

- Distributed architecture with config servers, shards, and mongos
- Mongos router as the entry point for applications
- Data distributed across multiple shards (sharding)
- Each shard as a ReplicaSet (high availability)
- Managed and orchestrated via Kubernetes & Helm



Motivation - Why Own Helm-Chart?

Standard-Charts: Often too inflexible

Our Helm-Chart:

- Resources and replicas configurable per function
- Volumes defined per function
- Automatic sharding and replication
- Authentication via secrets
- Safe upgrades and idempotency
- Learning everything from scratch

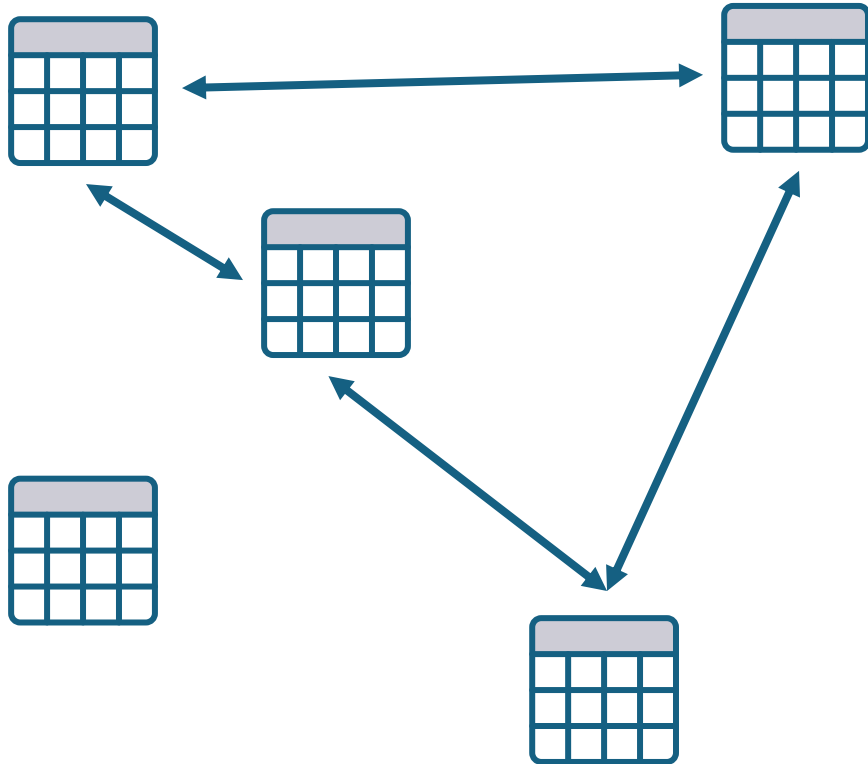
MongoDB

NoSQL

Not Only SQL

Nicht relationale Datenbank

Relational Database



MongoDB – Document

A record in MongoDB is a document, which is a data structure composed of field and value pairs.

```
{  
  name: "sue",  
  age: 26,  
  status: "A",  
  groups: [ "news", "sports" ]  
}
```



← field: value
← field: value
← field: value
← field: value

Basically a JSON

MongoDB – Document

A record in MongoDB is a document, which is a data structure composed of field and value pairs.

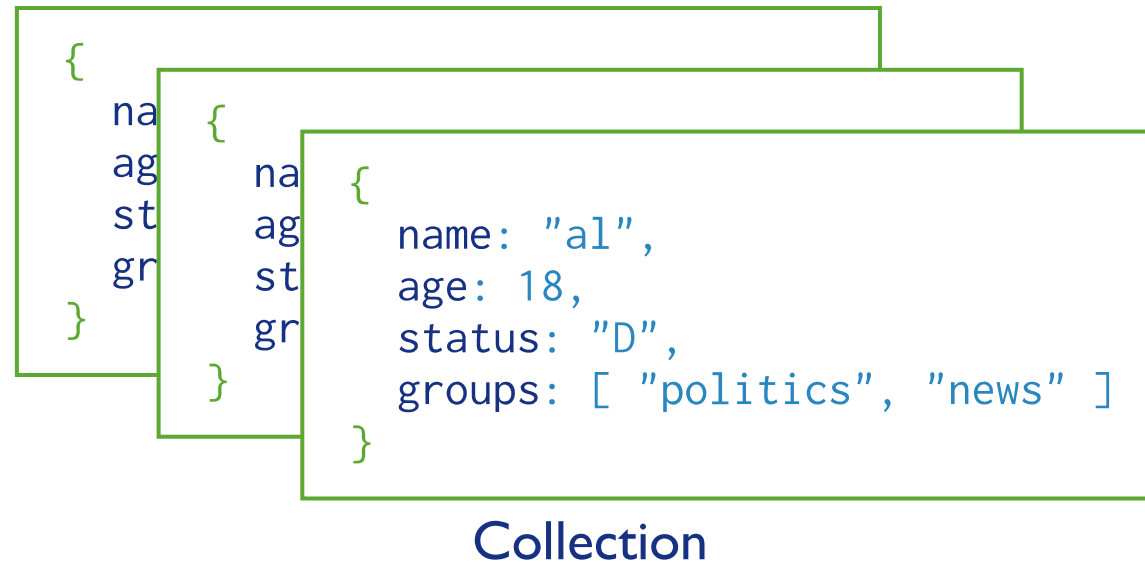
```
{  
  name: "sue",  
  age: 26,  
  status: "A",  
  groups: [ "news", "sports" ]  
}
```

BSON

← field: value
← field: value
← field: value
← field: value

MongoDB - Collections

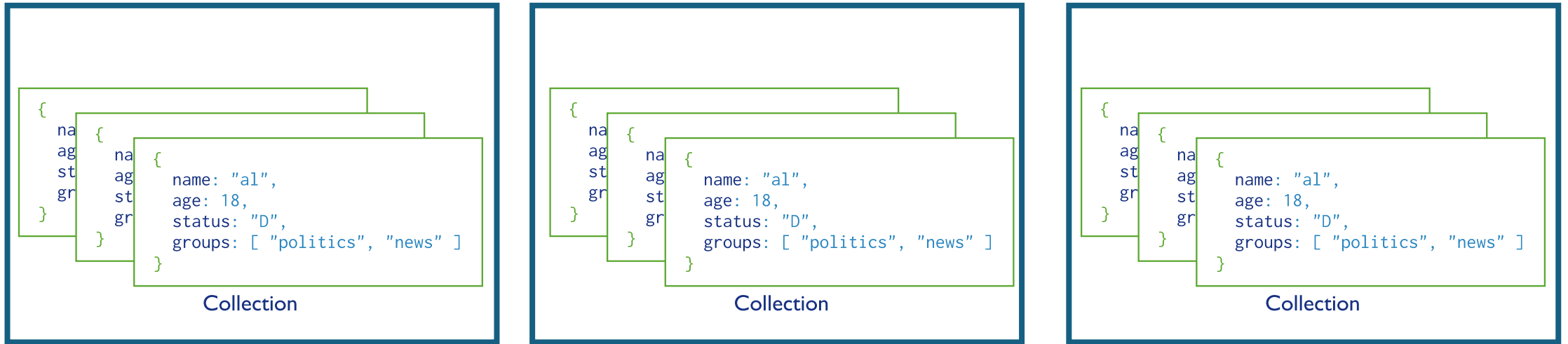
Documents are stored in Collections



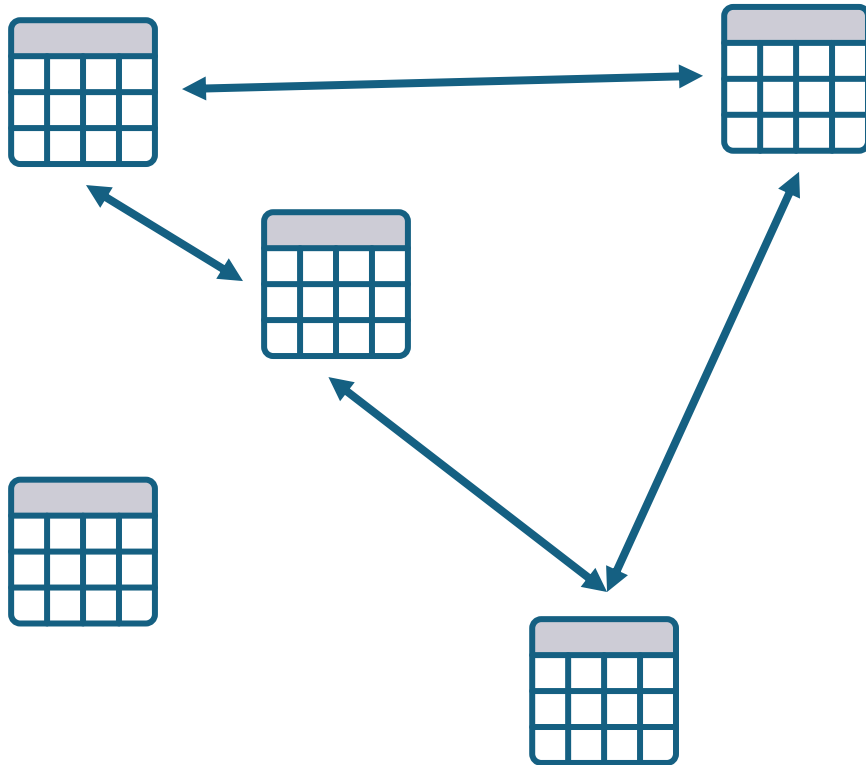
Comparable to tables in relational databases

MongoDB - Database

Database

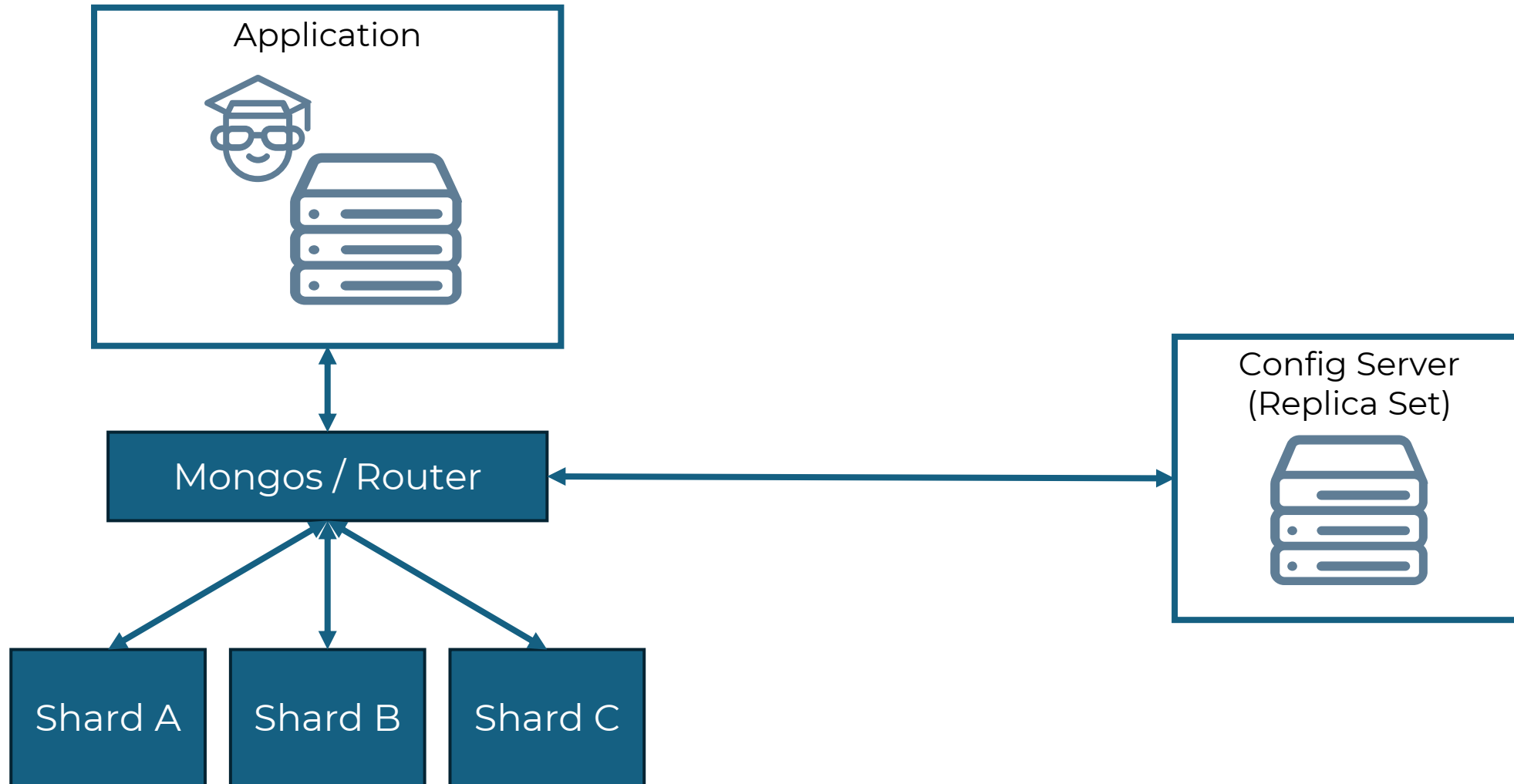


Relational vs No Relational DB

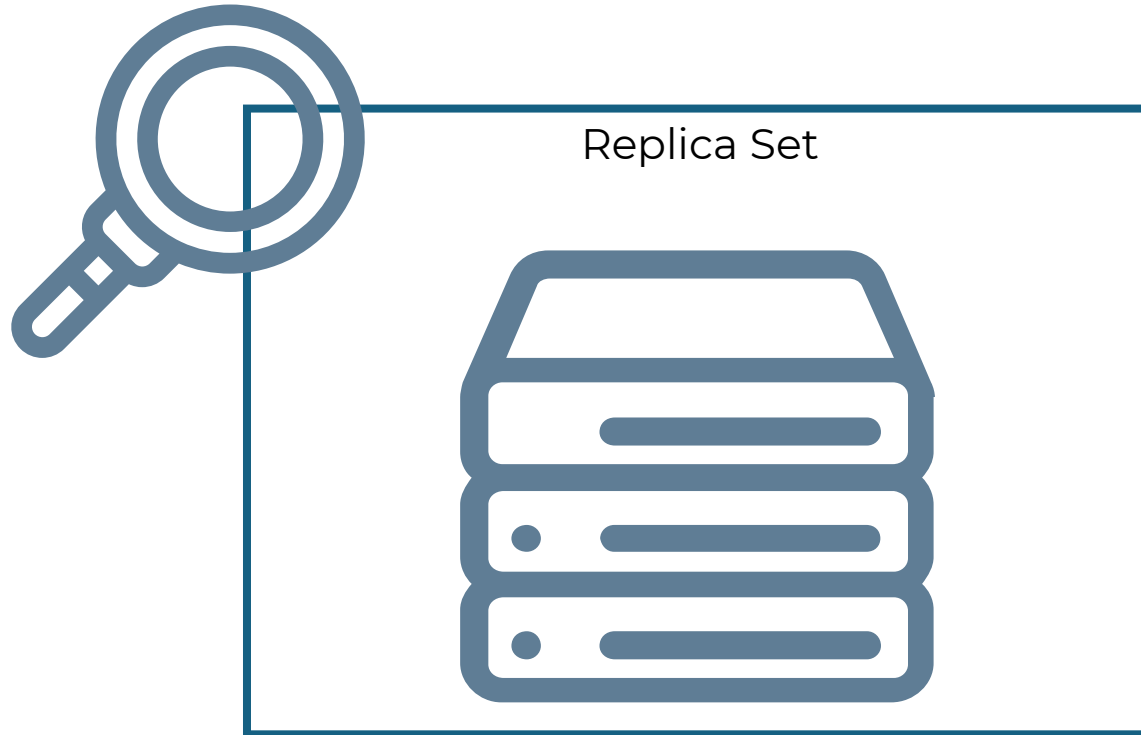


```
{  
  name: "sue",  
  age: 26,  
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  groups: [ "news", "sports" ]  
}
```

MongoDB - Server Types

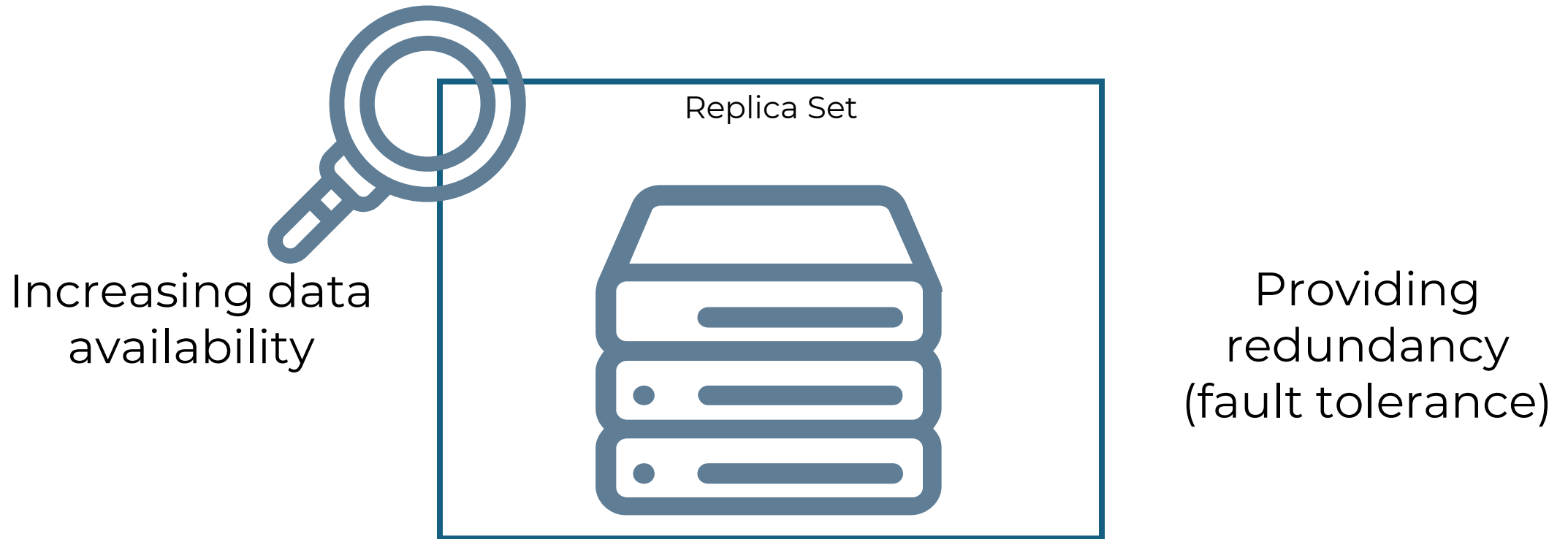


MongoDB – Replica Set



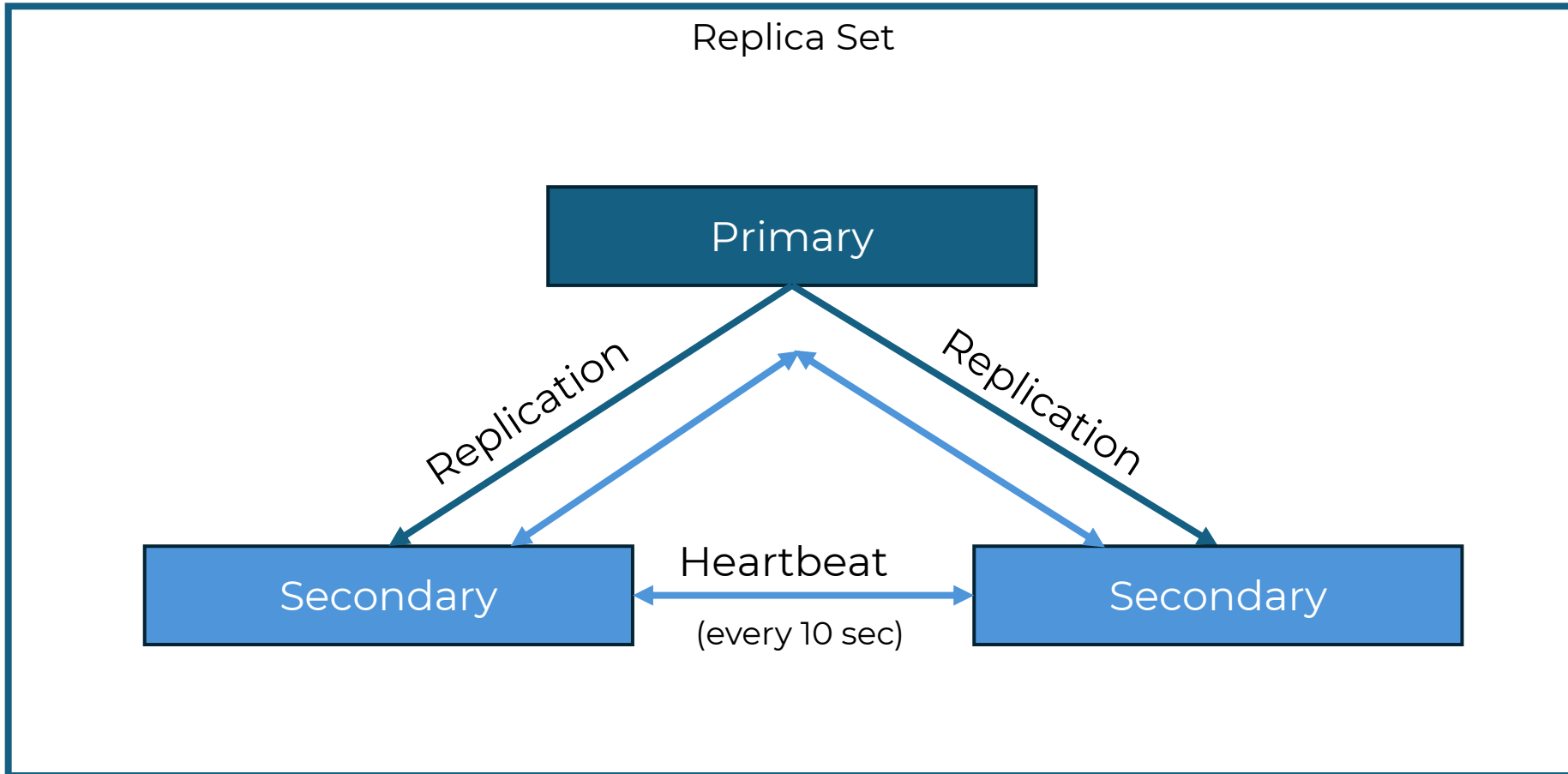
Group of servers that maintain the same data set

MongoDB – Replica Set

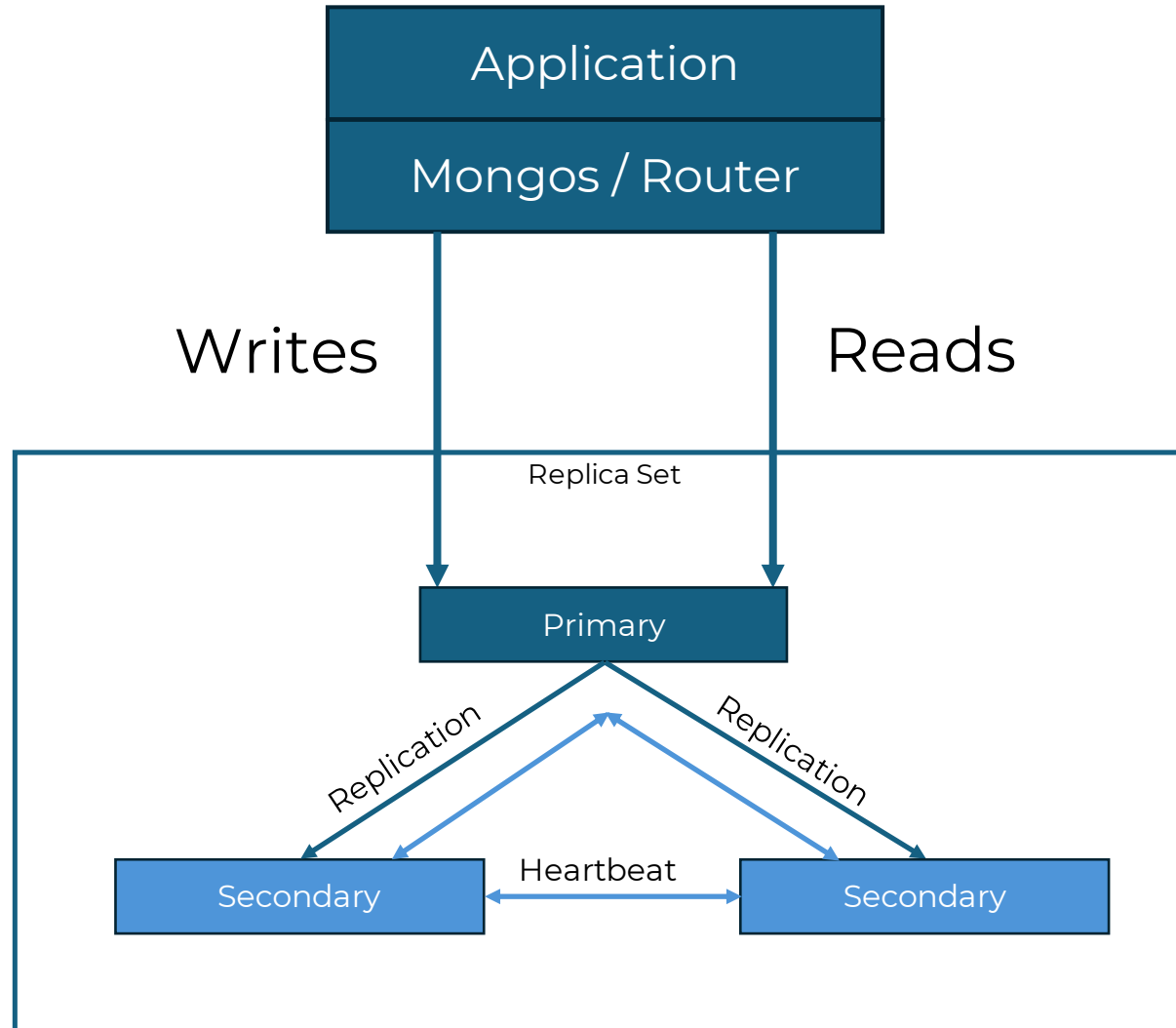


Group of servers that maintain the same data set

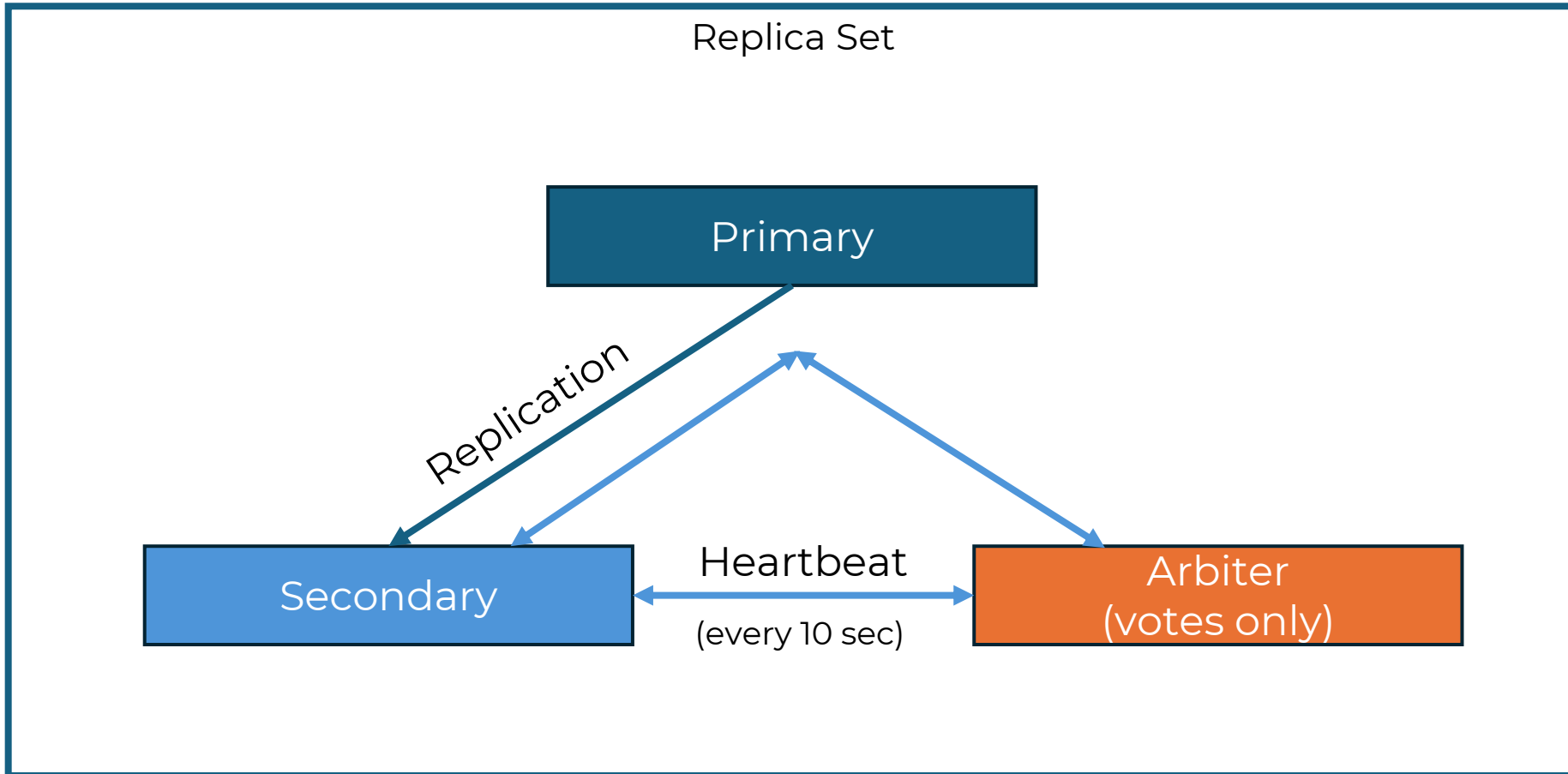
MongoDB – Replica Set



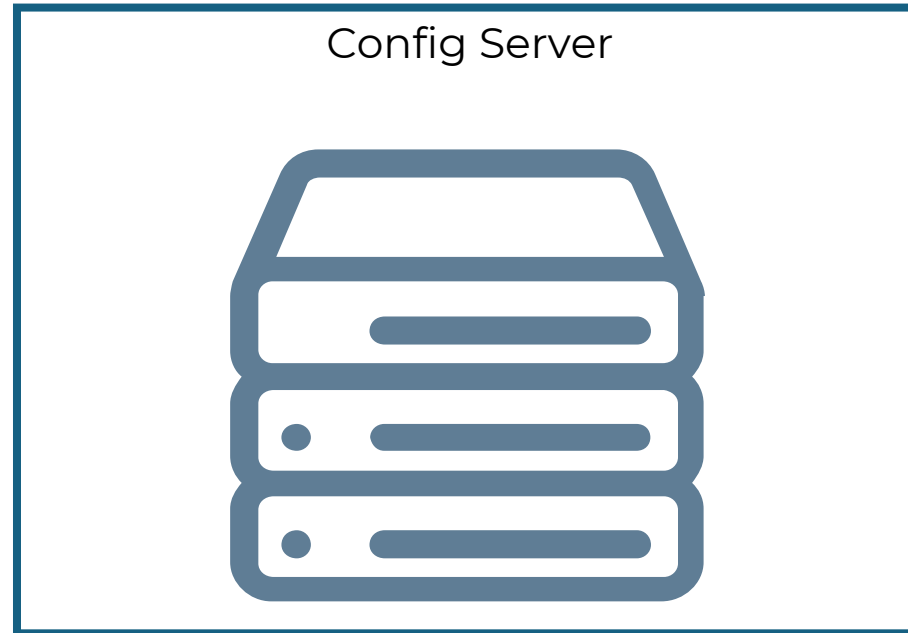
MongoDB – Replica Set



MongoDB – Replica Set (Arbiter)

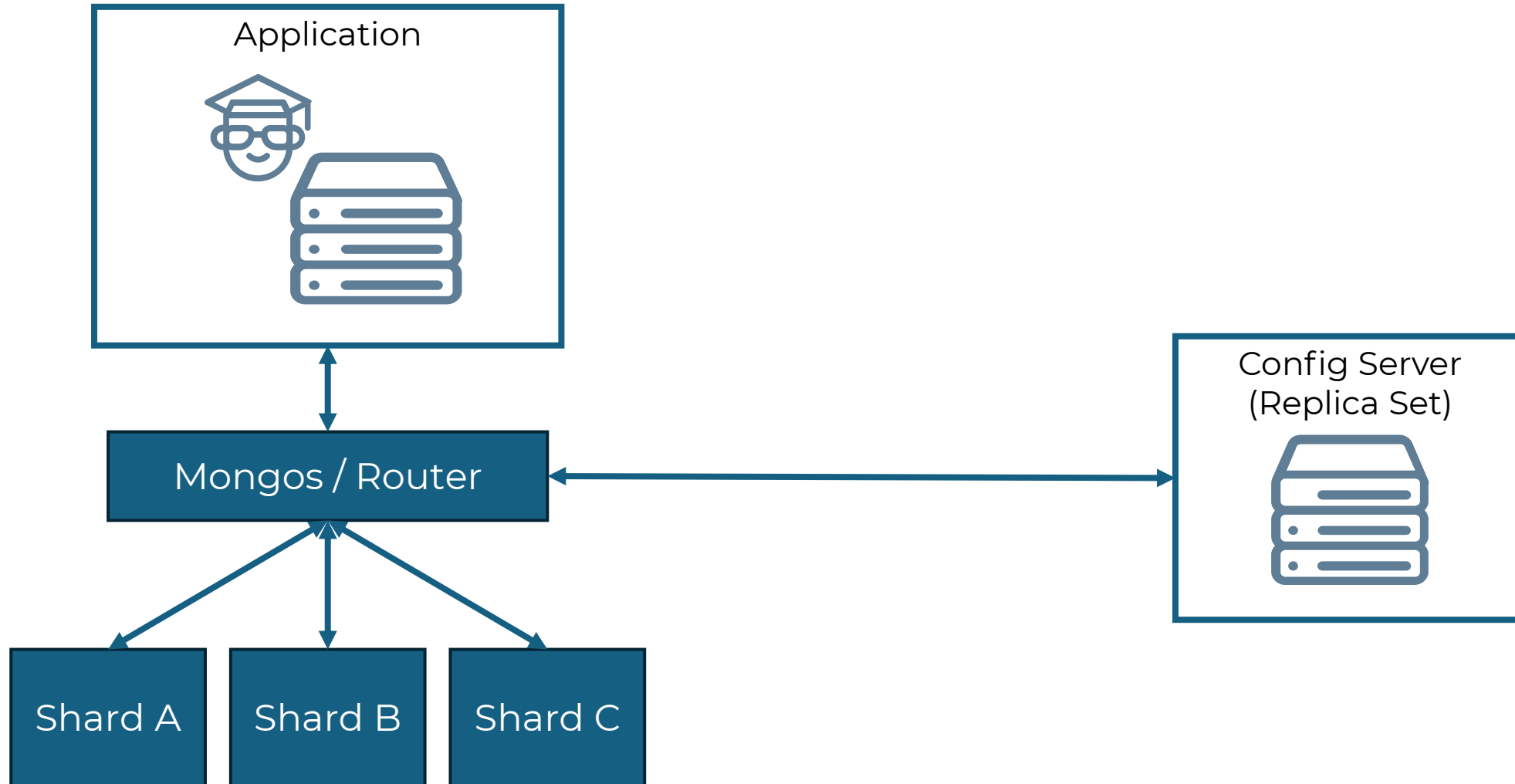


MongoDB – Config Server



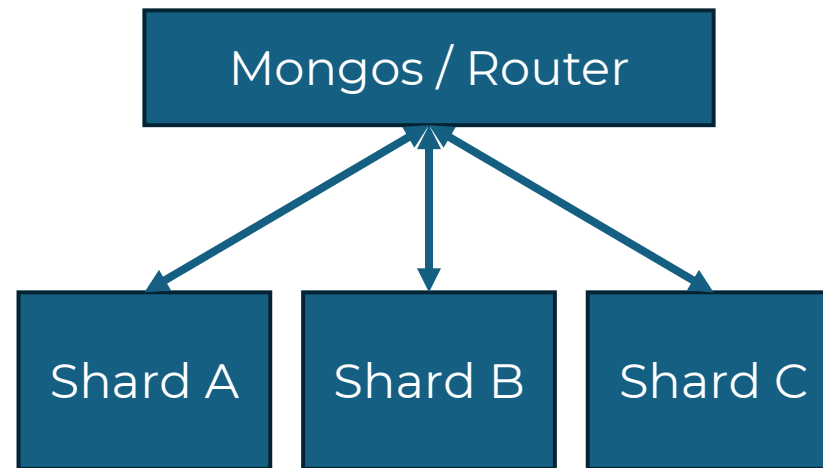
Stores Meta Data for shared clusters

MongoDB - Server Types



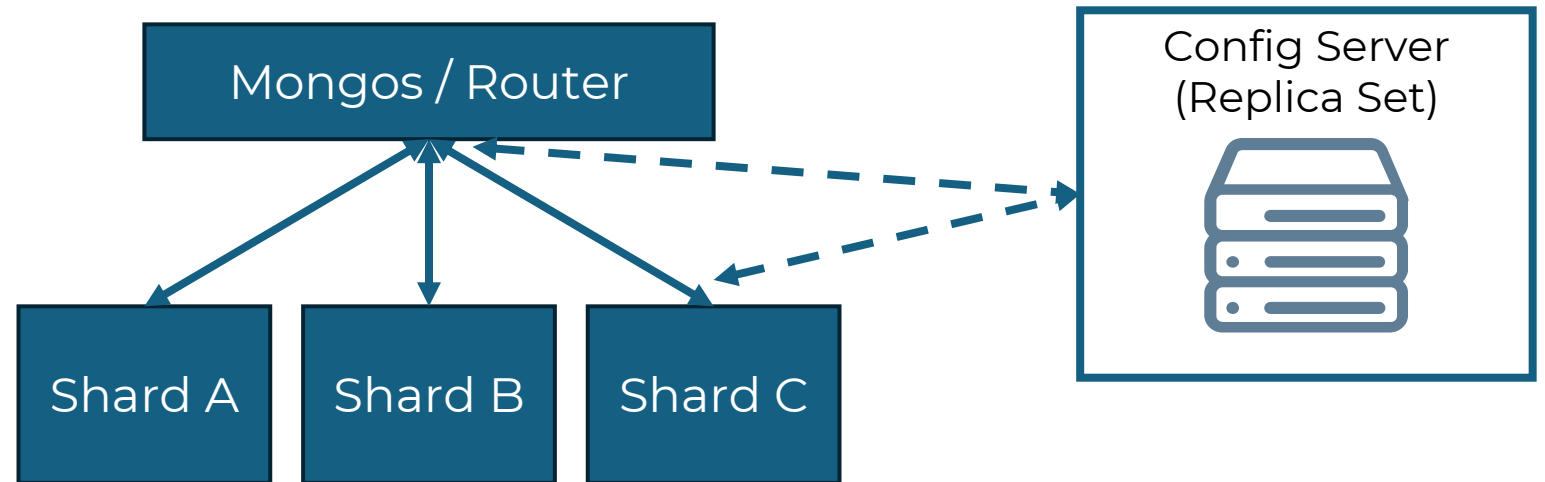
MongoDB - Sharding Strategies

Why do I need sharding?



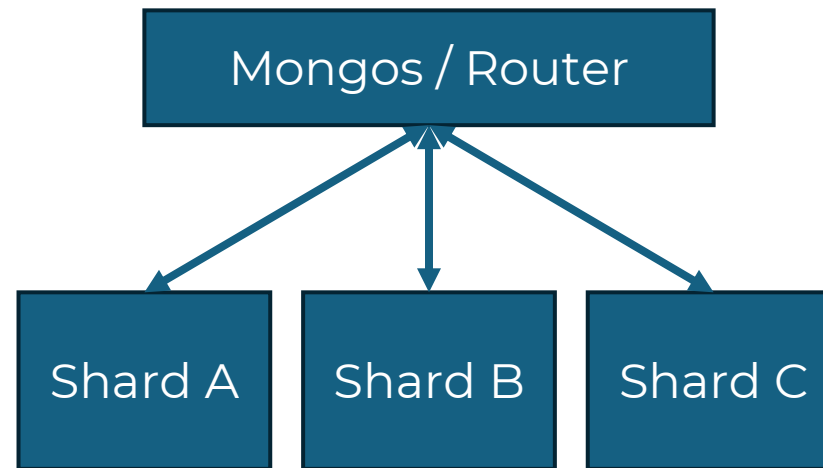
MongoDB - Sharding Strategies

Why do I need sharding?



MongoDB - Sharding Strategies

Why do I need sharding?



Data is bigger than one server can handle!

“...very large data sets and high throughput operations”

MongoDB - Sharding Strategies

Why do I need sharding?

Increase Storage capacity

- Additional disks increase a single cluster's size

Linear scaling reads and writes increase the throughput

- Parallel processing

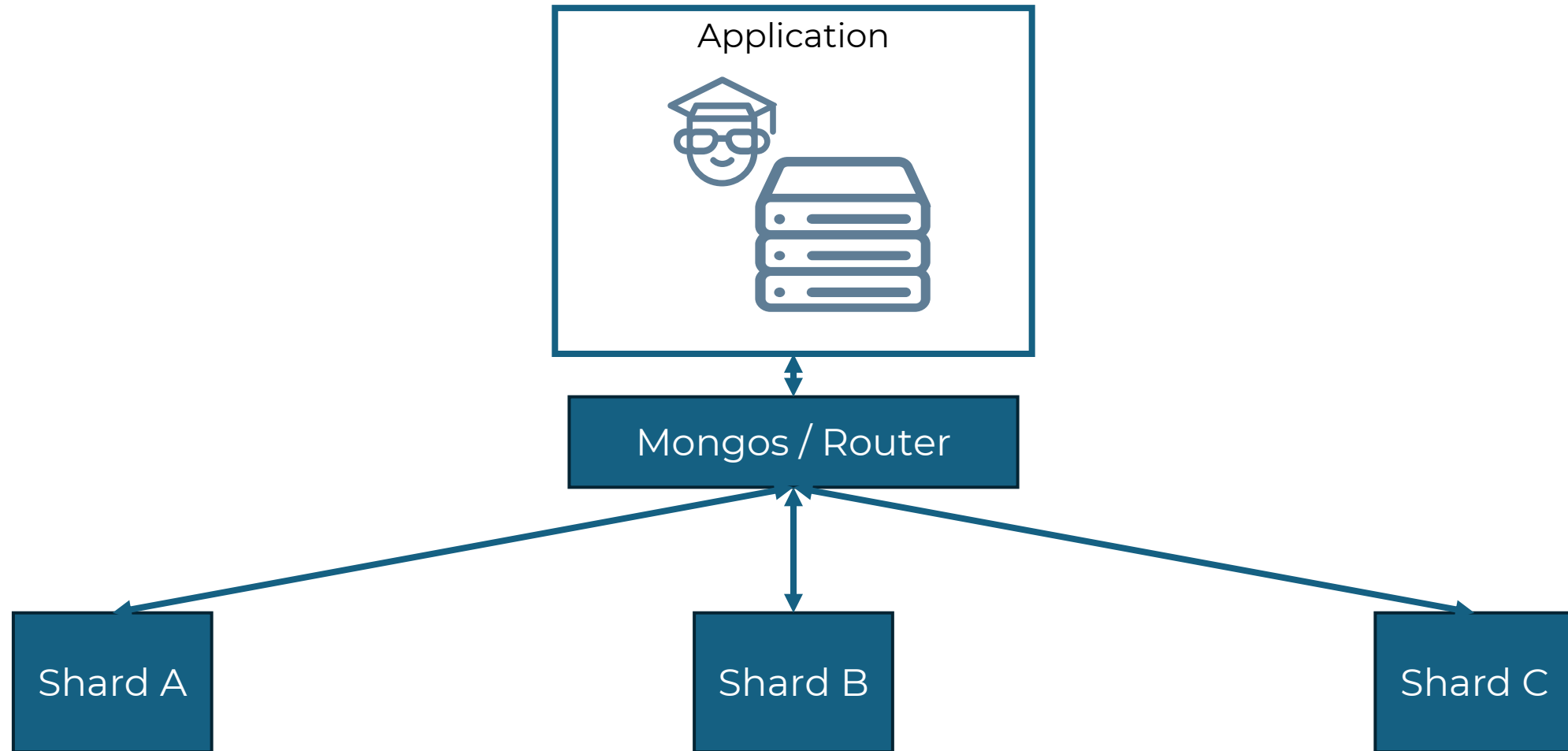
Latency decreases (for reads and writes)

- More RAM improves system performance

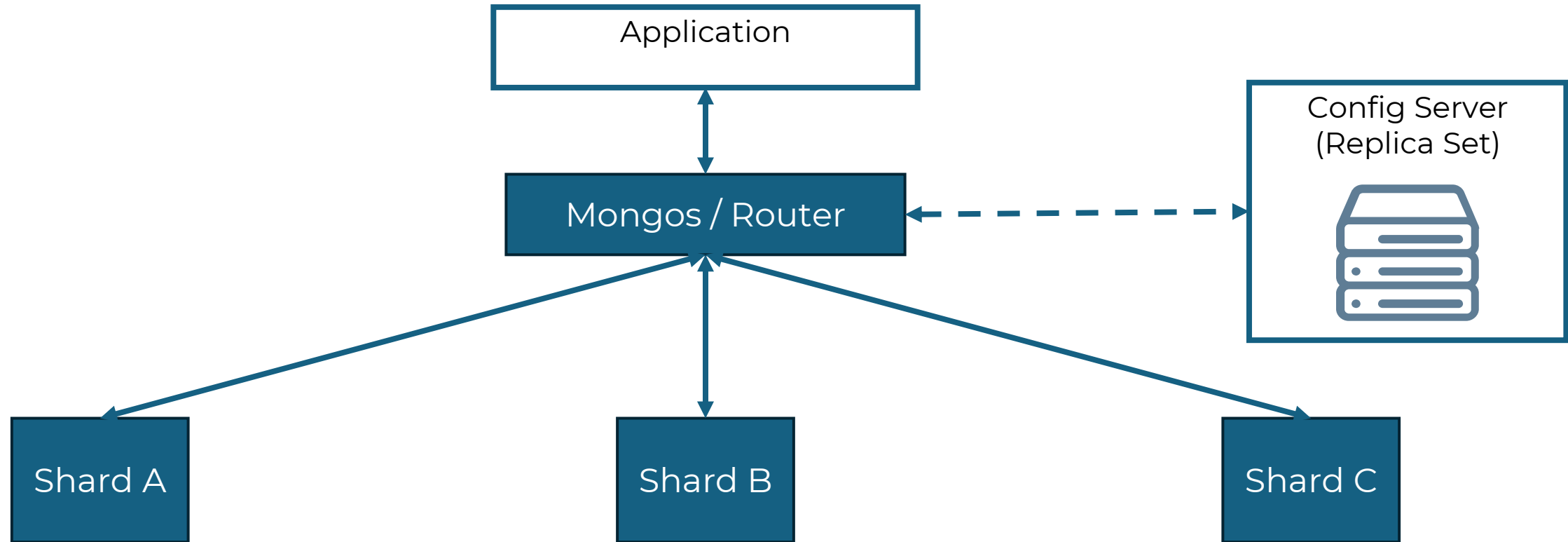
Disaster Recovery gets more efficient

- Restores can be parallelised

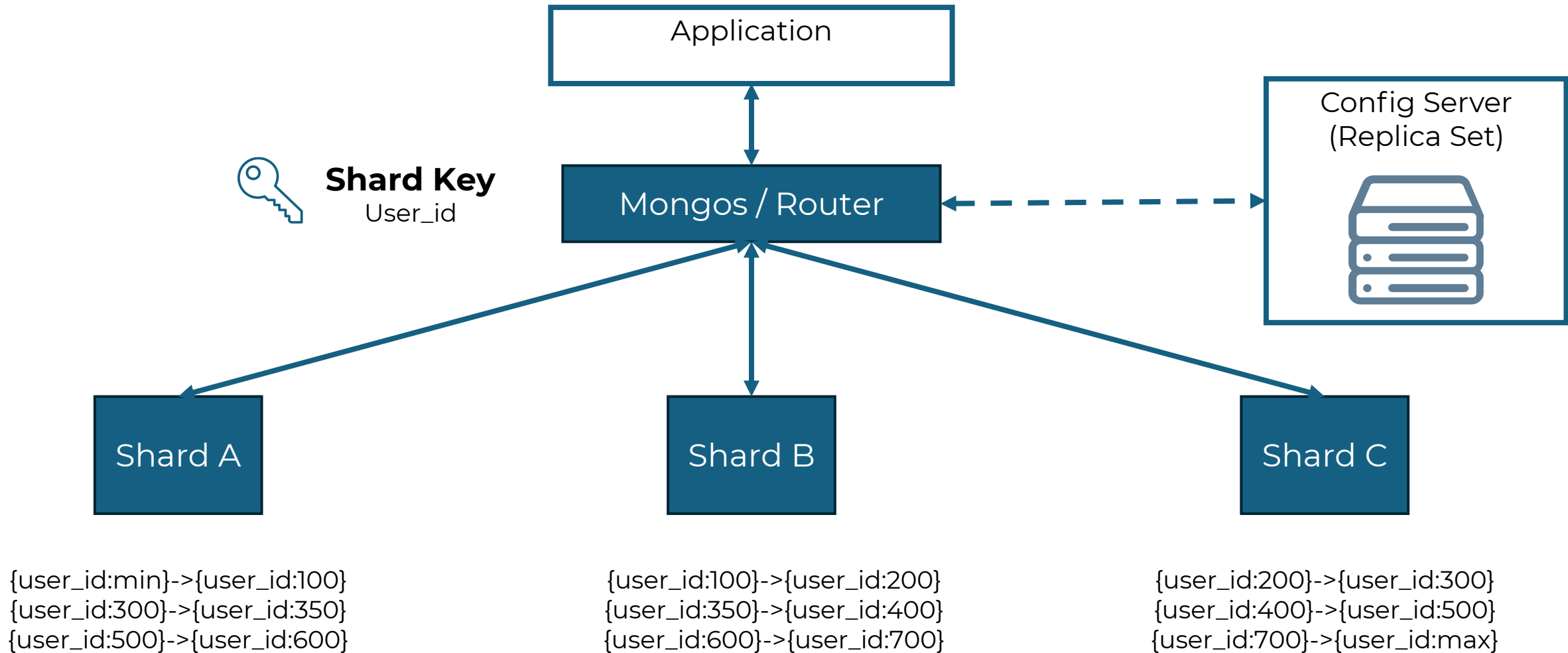
MongoDB – Sharding



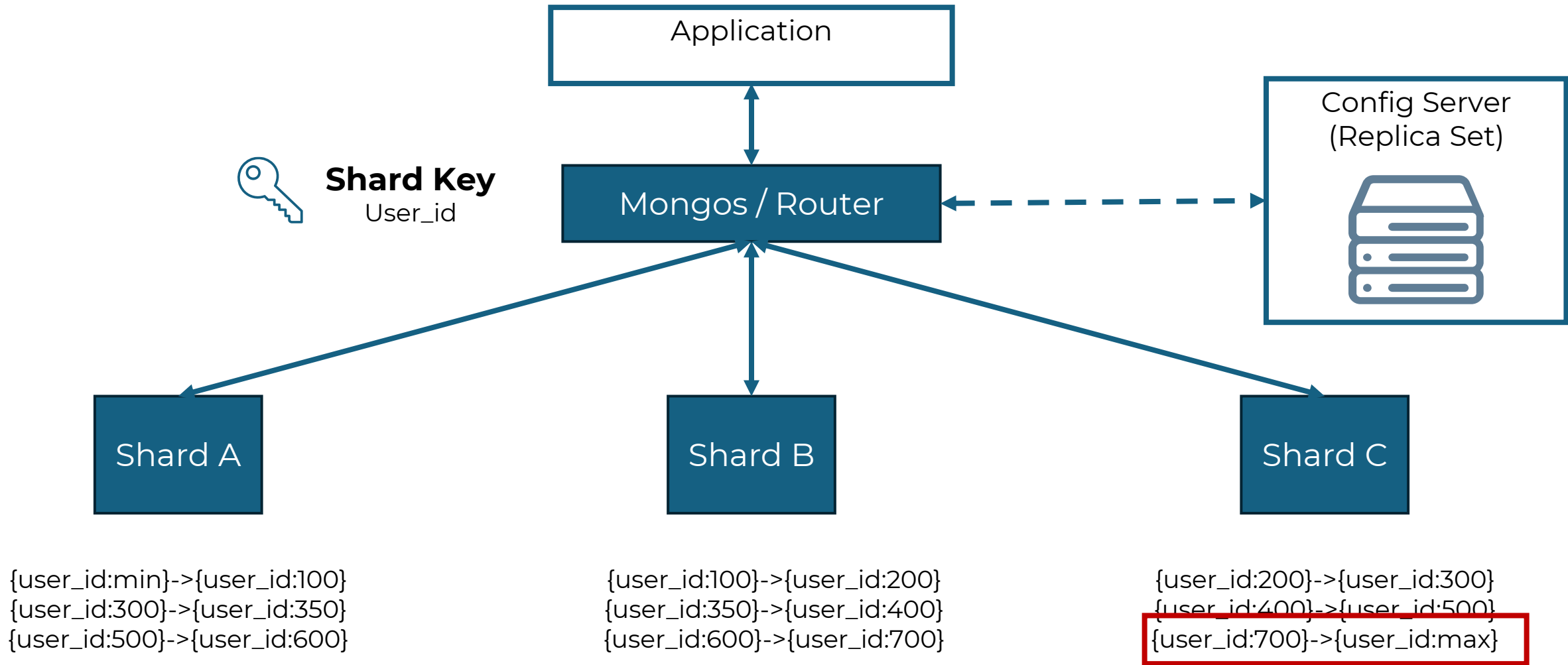
MongoDB – Shard Key



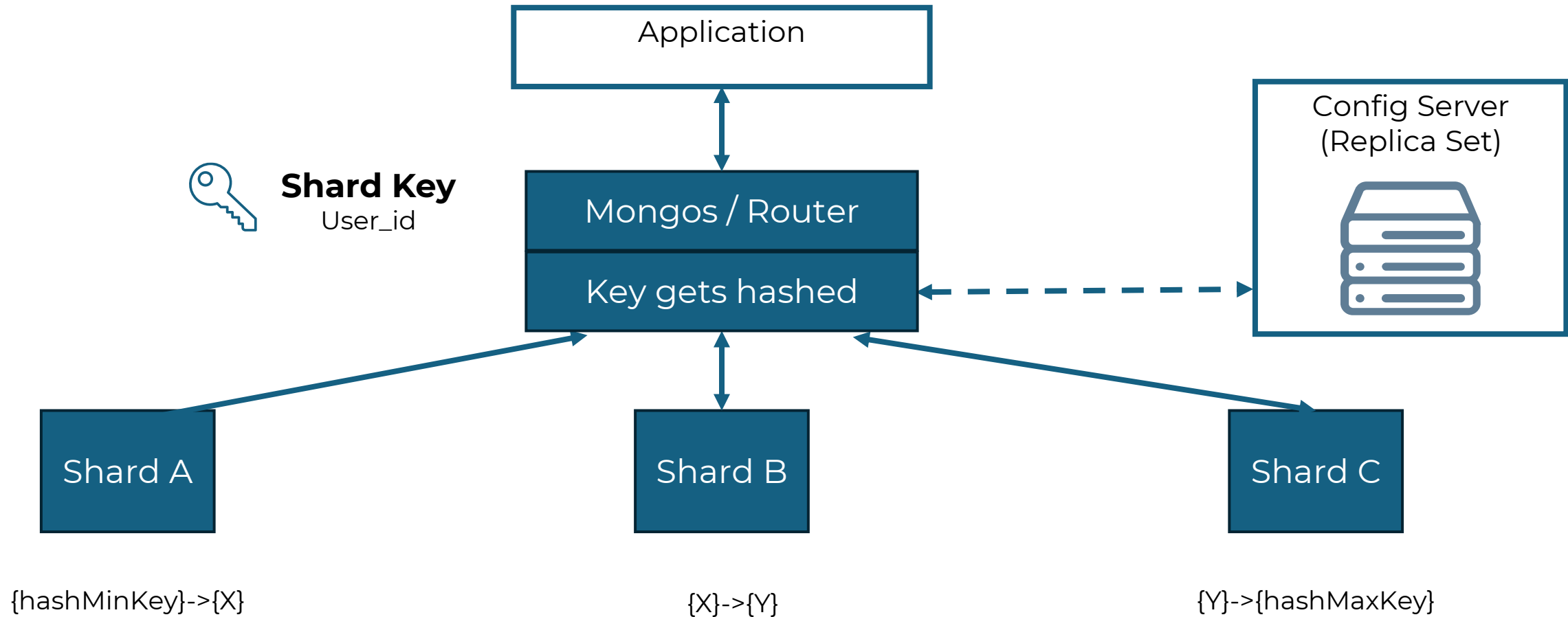
MongoDB – Shard Key



MongoDB – Ranged Sharding



MongoDB – Hashed Sharding



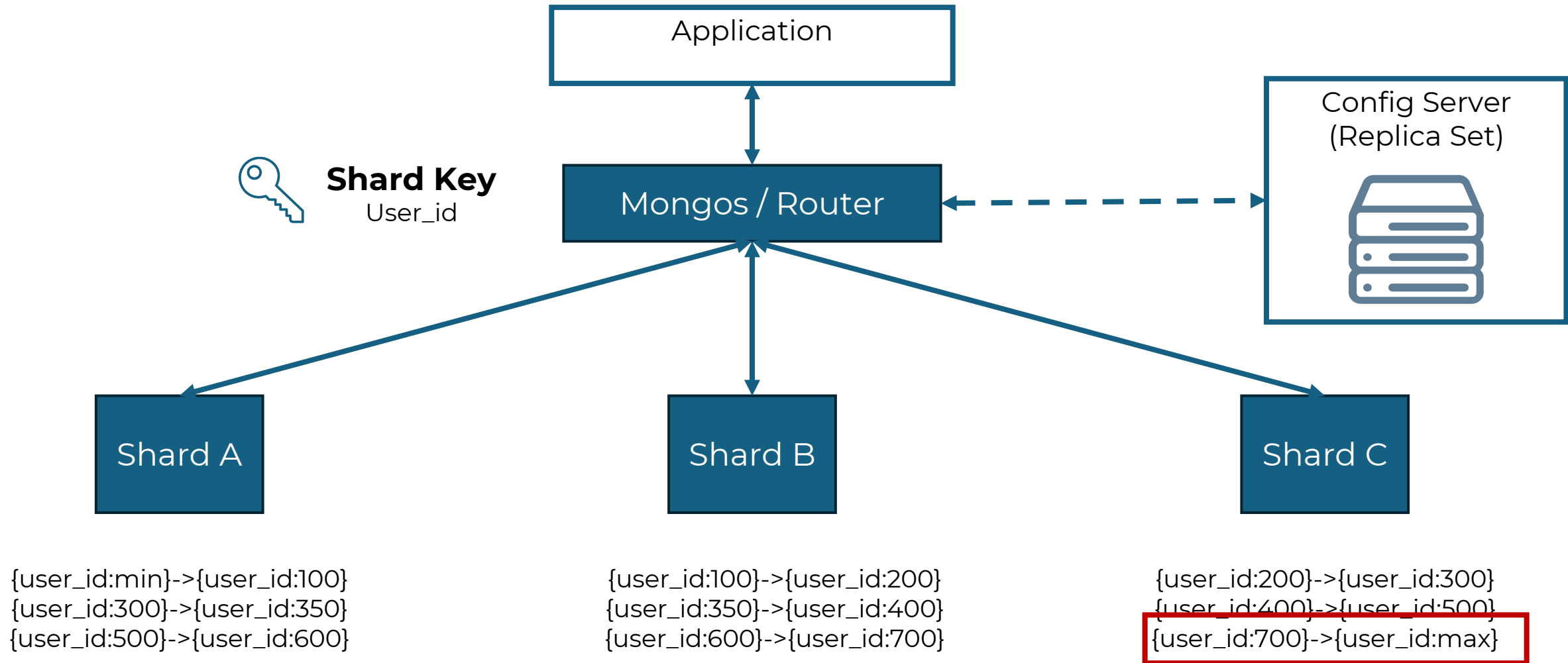
MongoDB – Hashed Sharding

Hashed sharding uses a hashed value as the shard key

- Even data distribution across shards
- Even read / write workload distribution

- Range queries can get very compute intense

MongoDB – Ranged Sharding



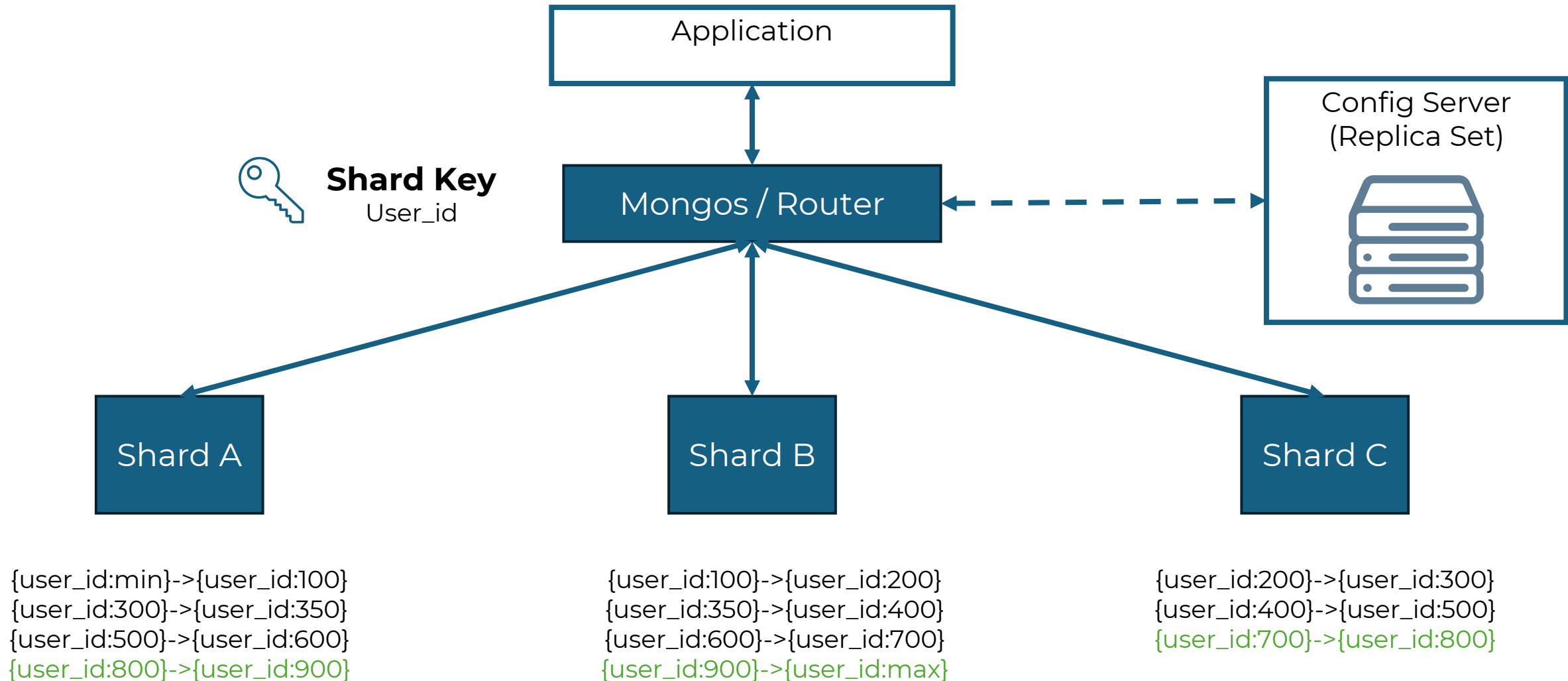
MongoDB – Ranged Sharding

Queries can read target documents within a contiguous range

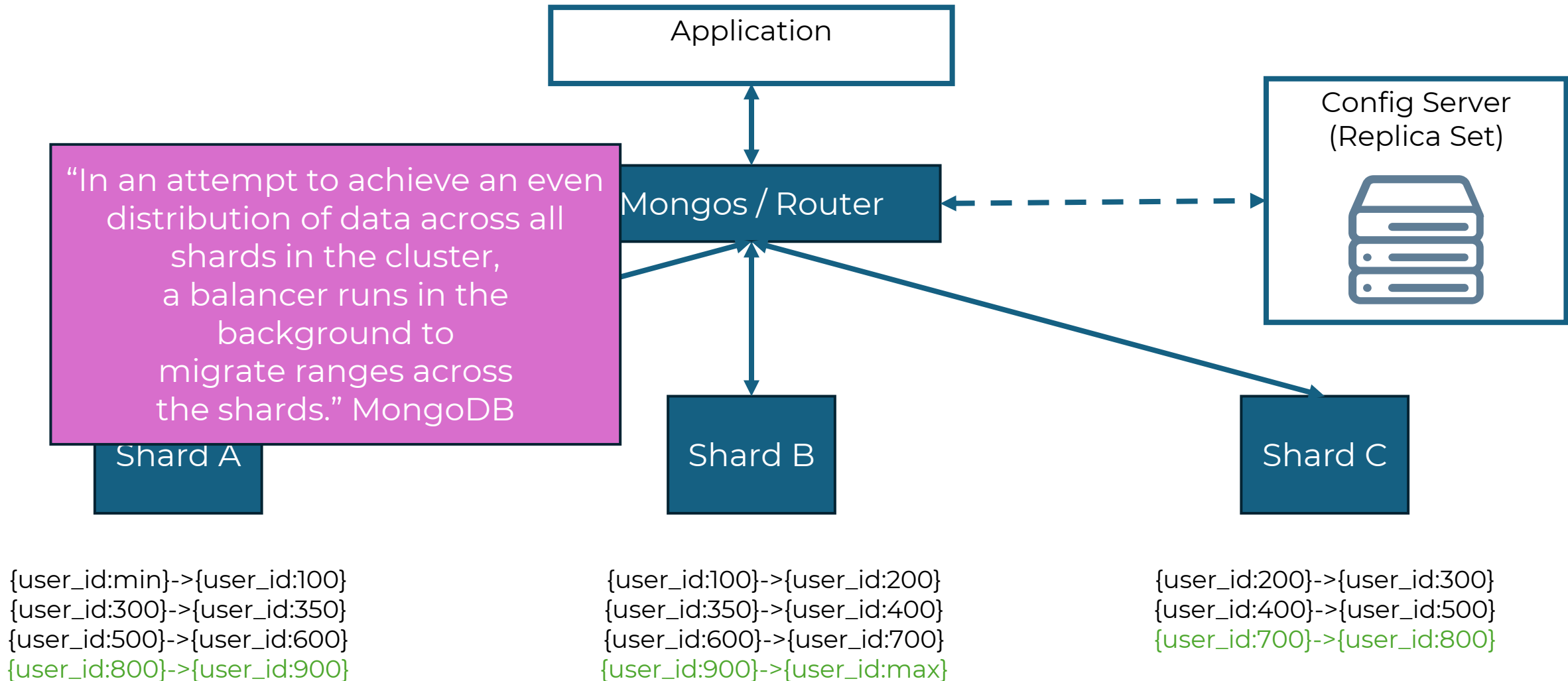
- Ideal for targeted operations

- MaxKey shard receives majority of incoming writes
- Reduces advantage of distributed writes in a shared cluster

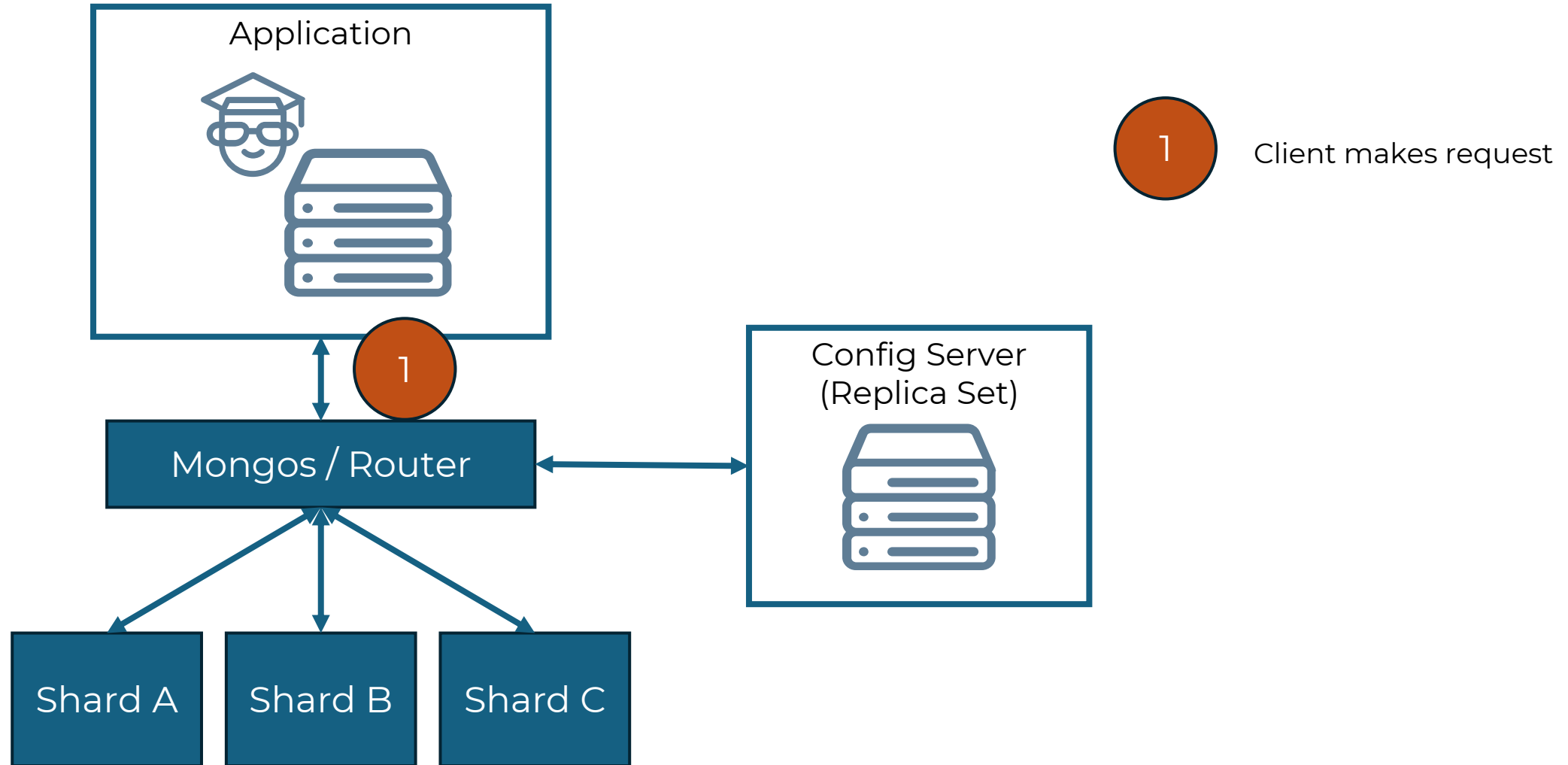
MongoDB – Ranged Sharding (Balancer)



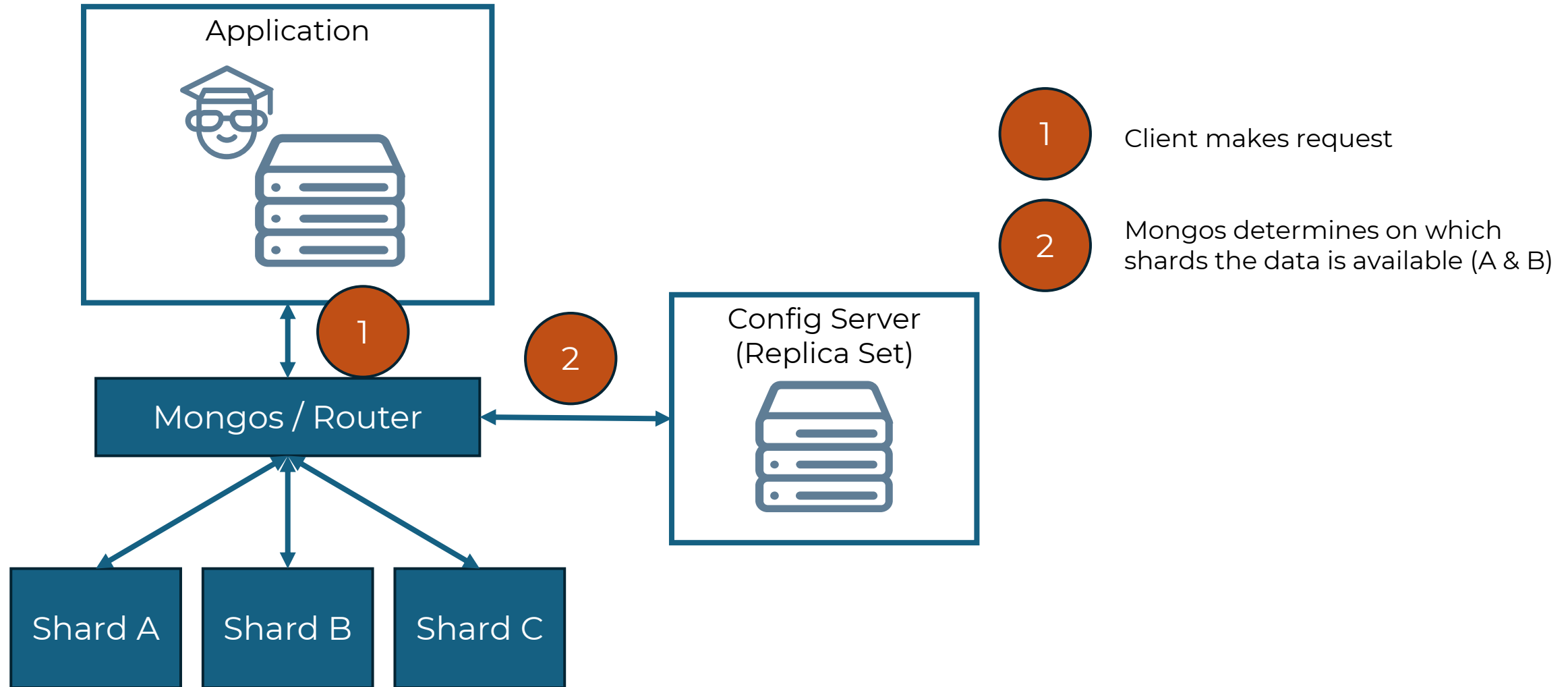
MongoDB – Ranged Sharding (Balancer)



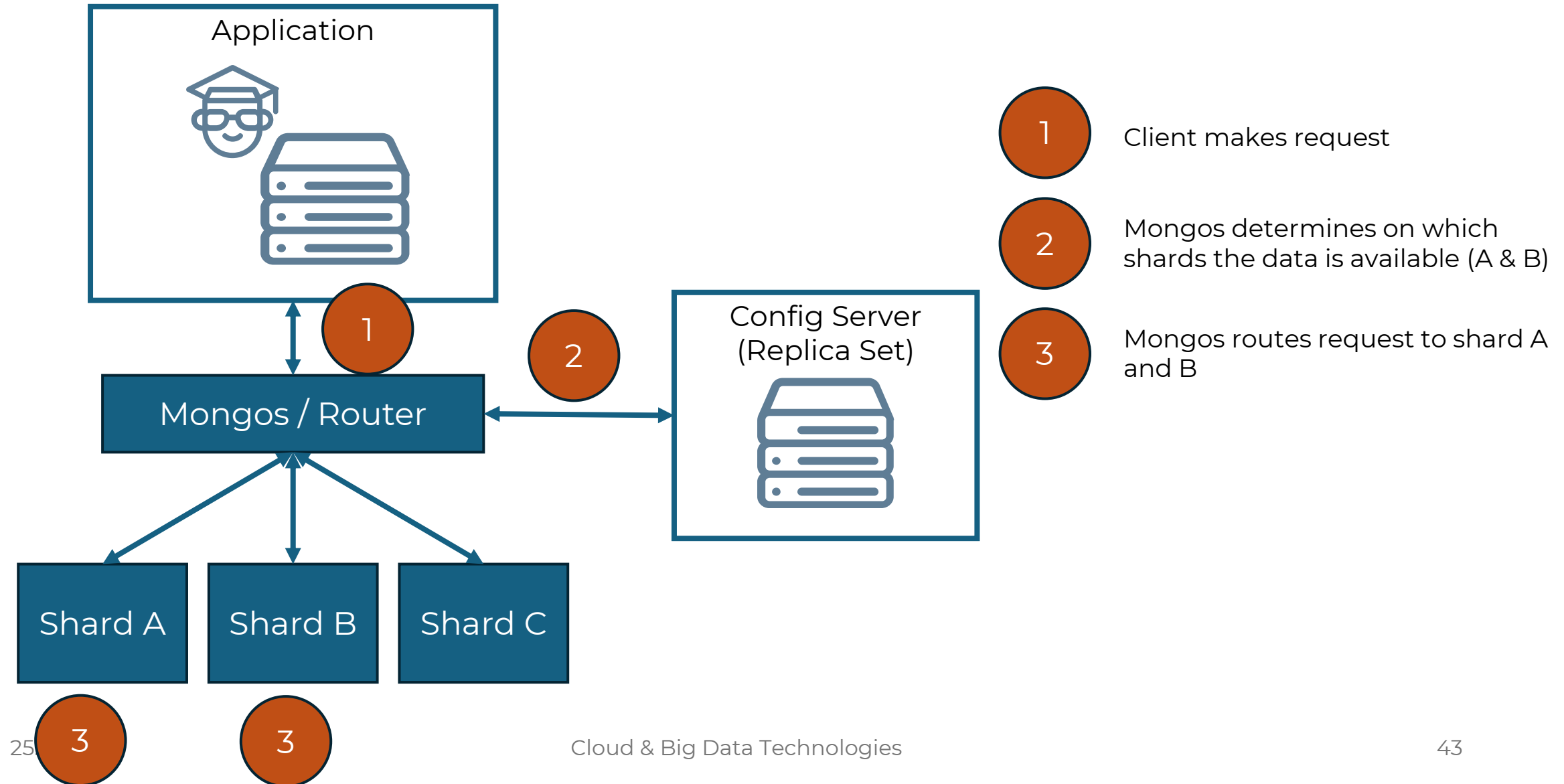
MongoDB – Query example



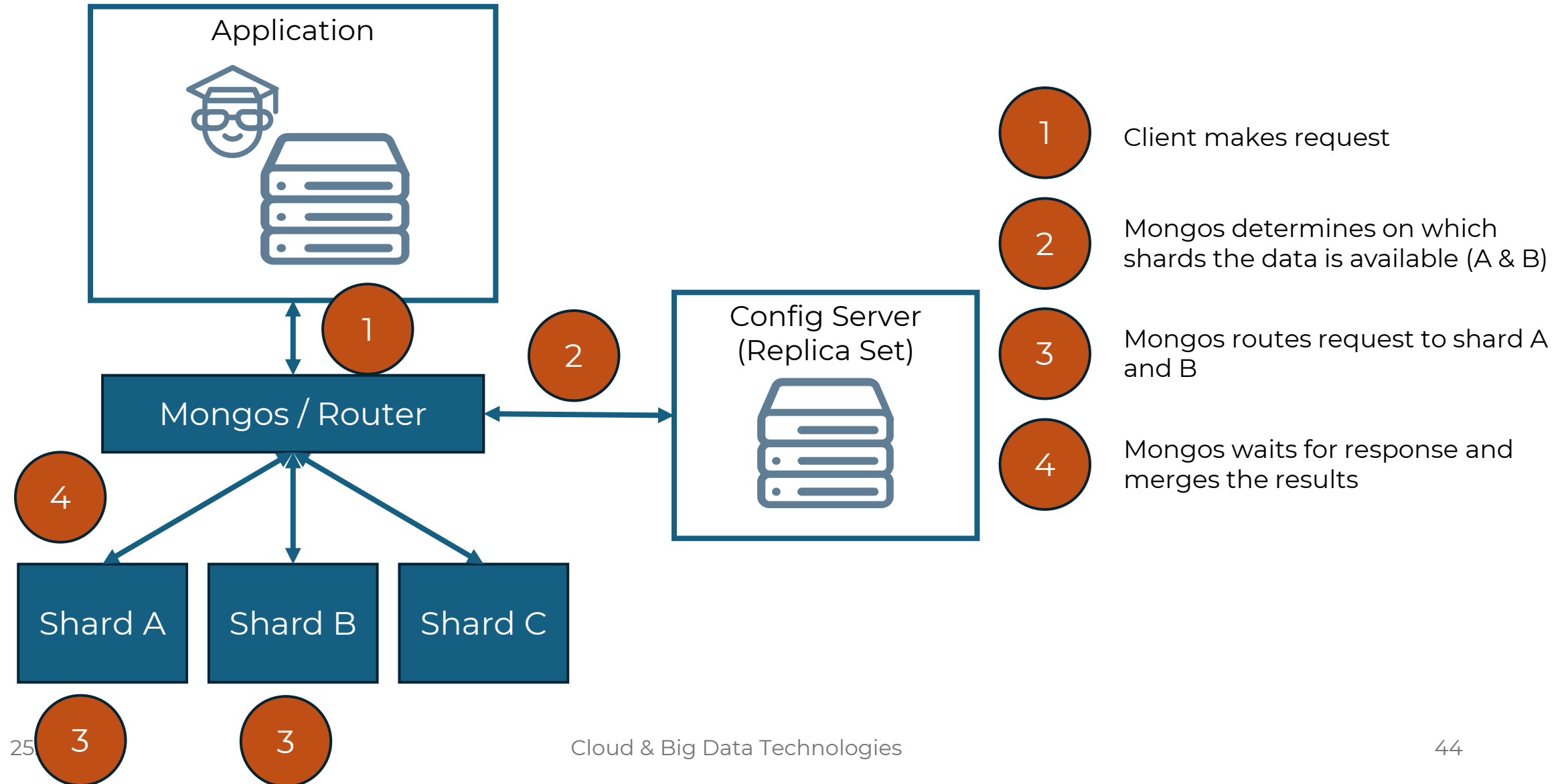
MongoDB – Query example



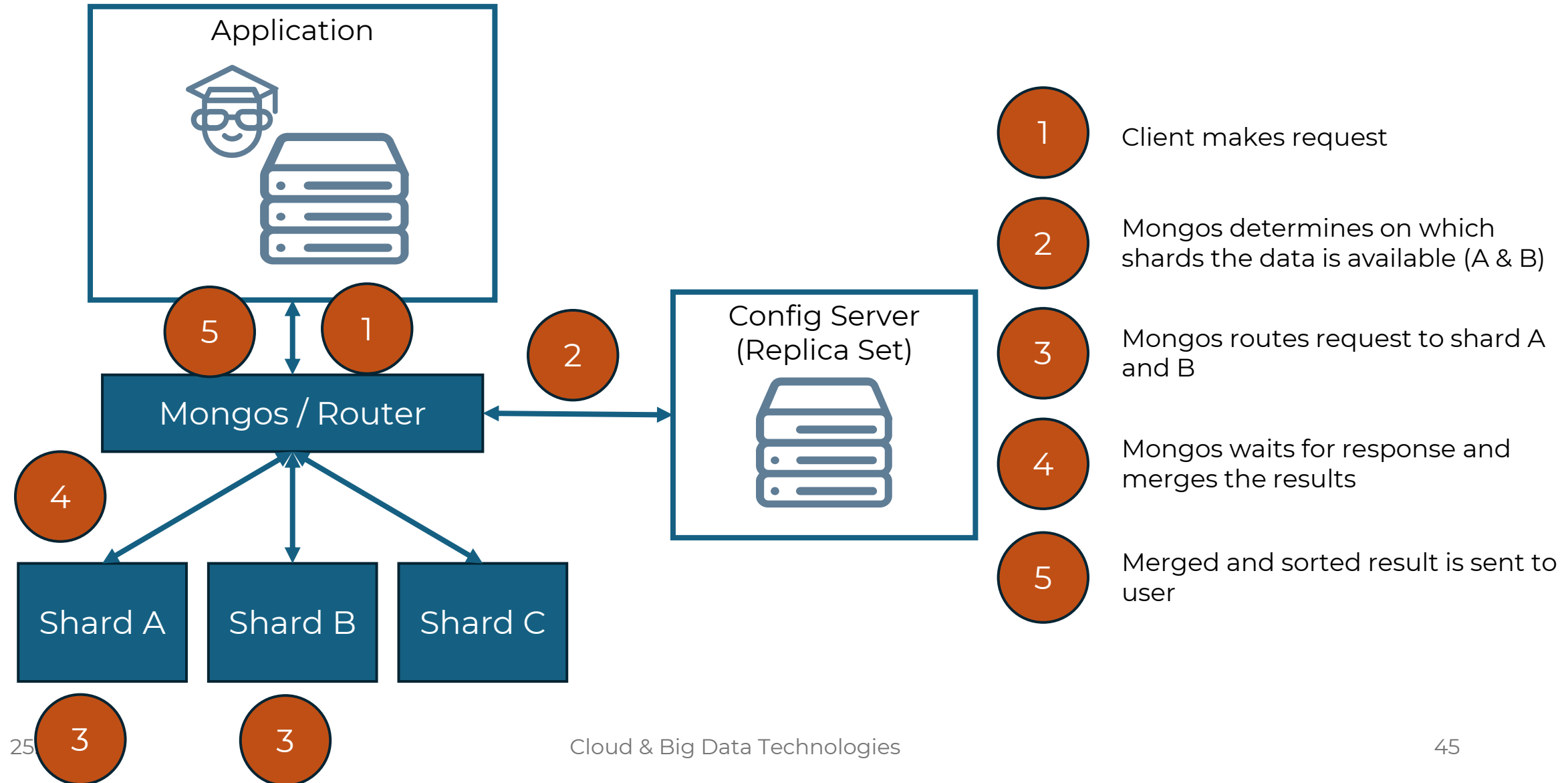
MongoDB – Query example



MongoDB – Query example

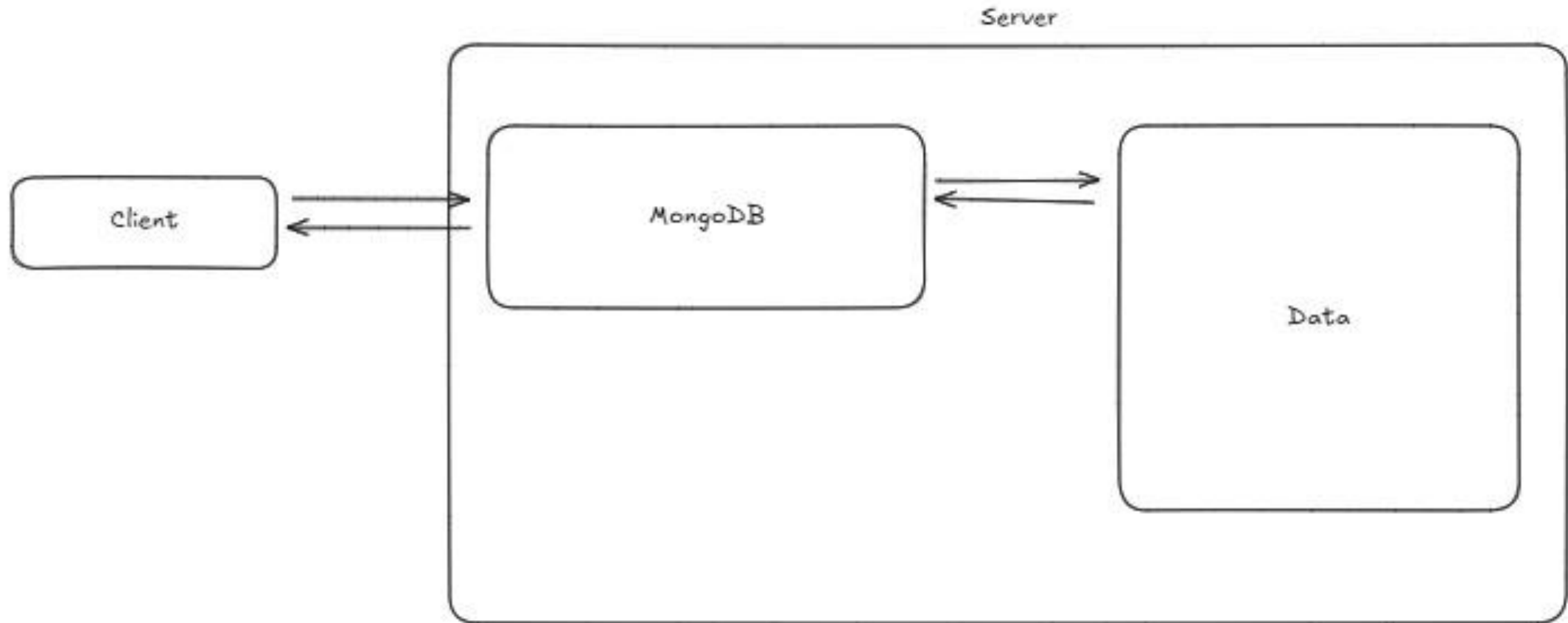


MongoDB – Query example

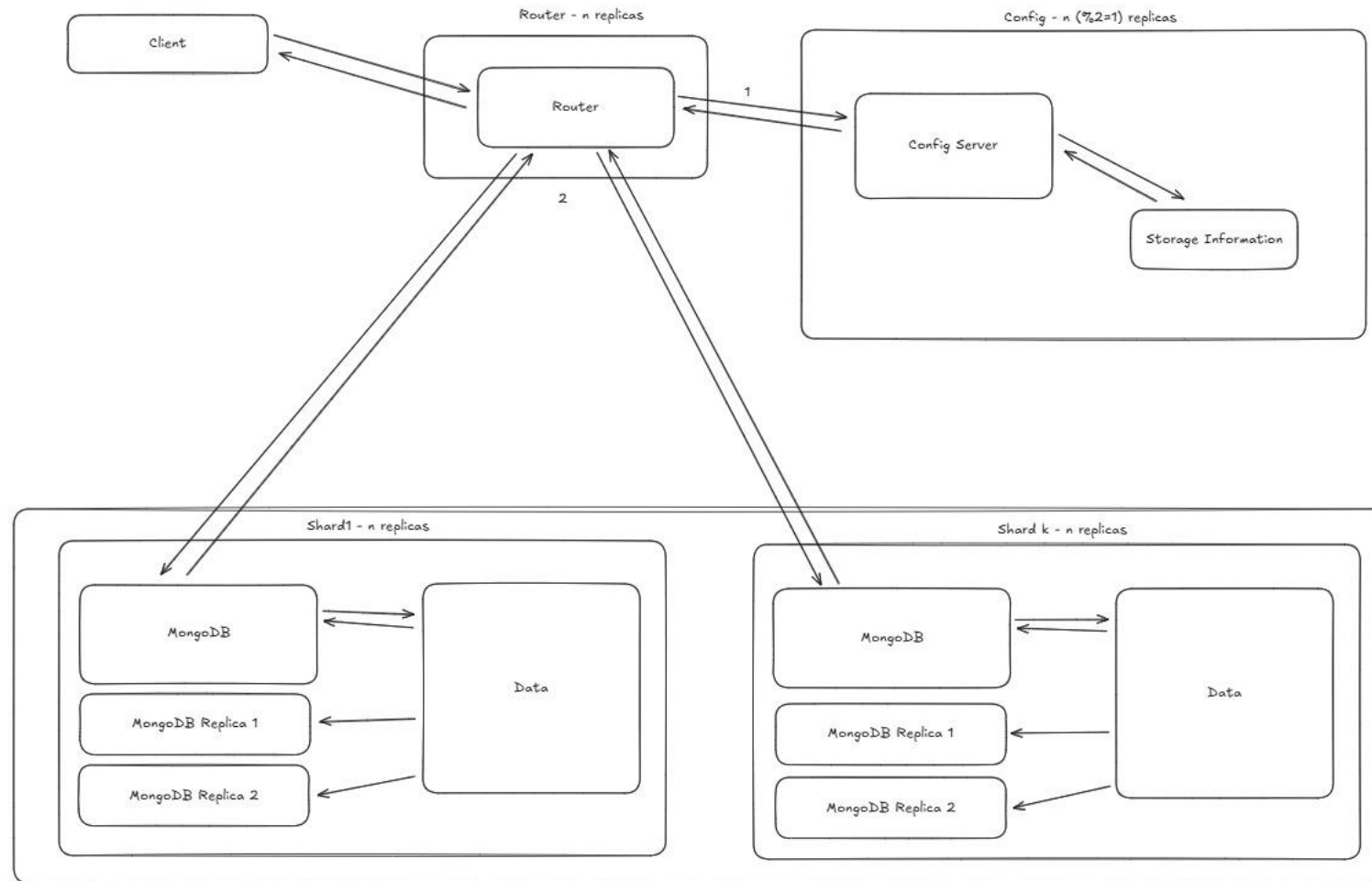


Initial Concept

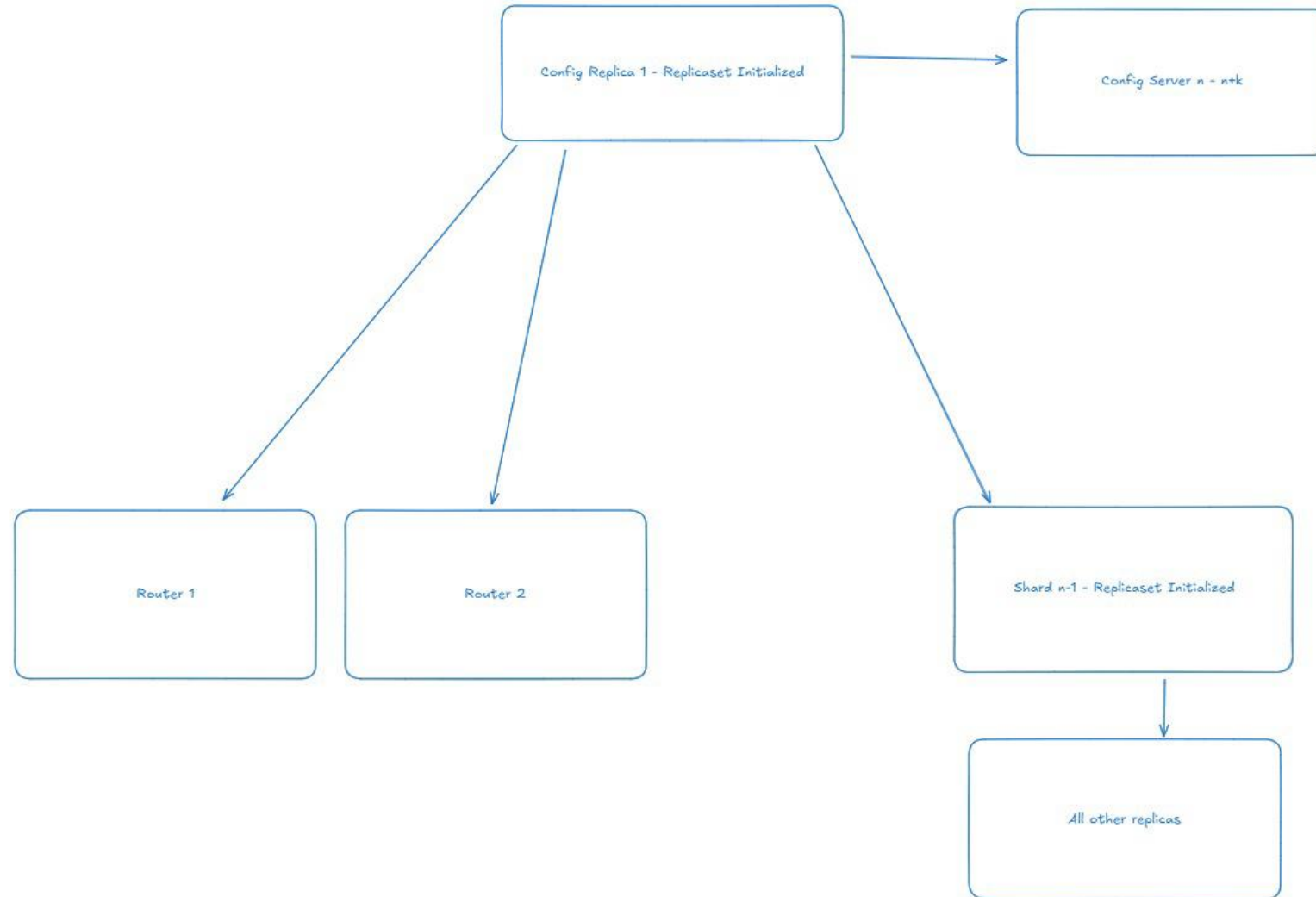
Initial Concept



Initial Concept



Initial Concept



Implementation

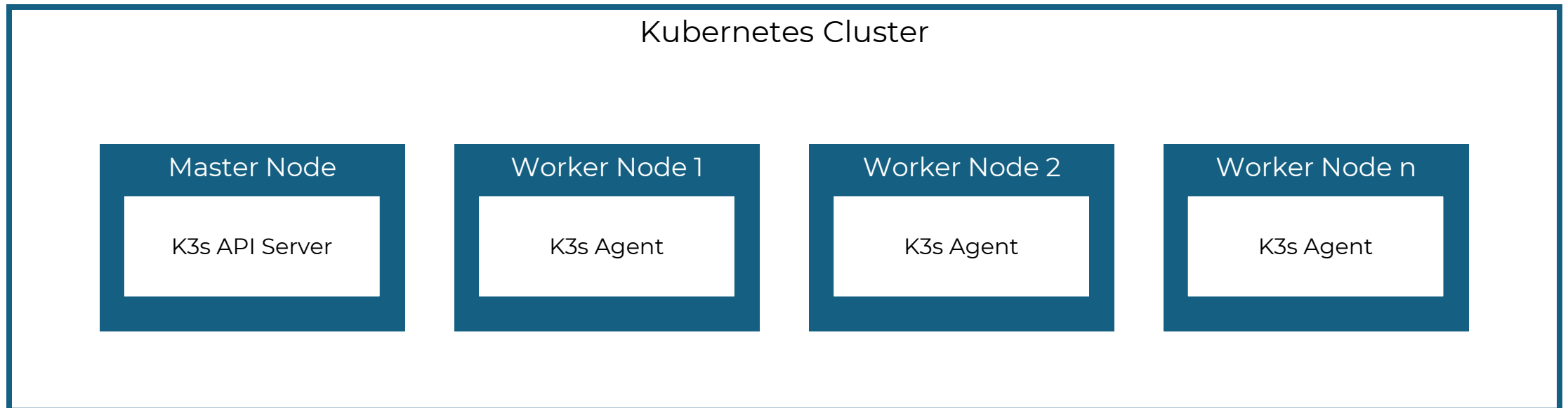
K3s Deployment

K3s Setup

- 1 Master Node
- n Worker Nodes (2 used in this deployment)

Instances

- Rocky Linux 9.4
- m1.large (4 vCPUs, 8GB RAM)



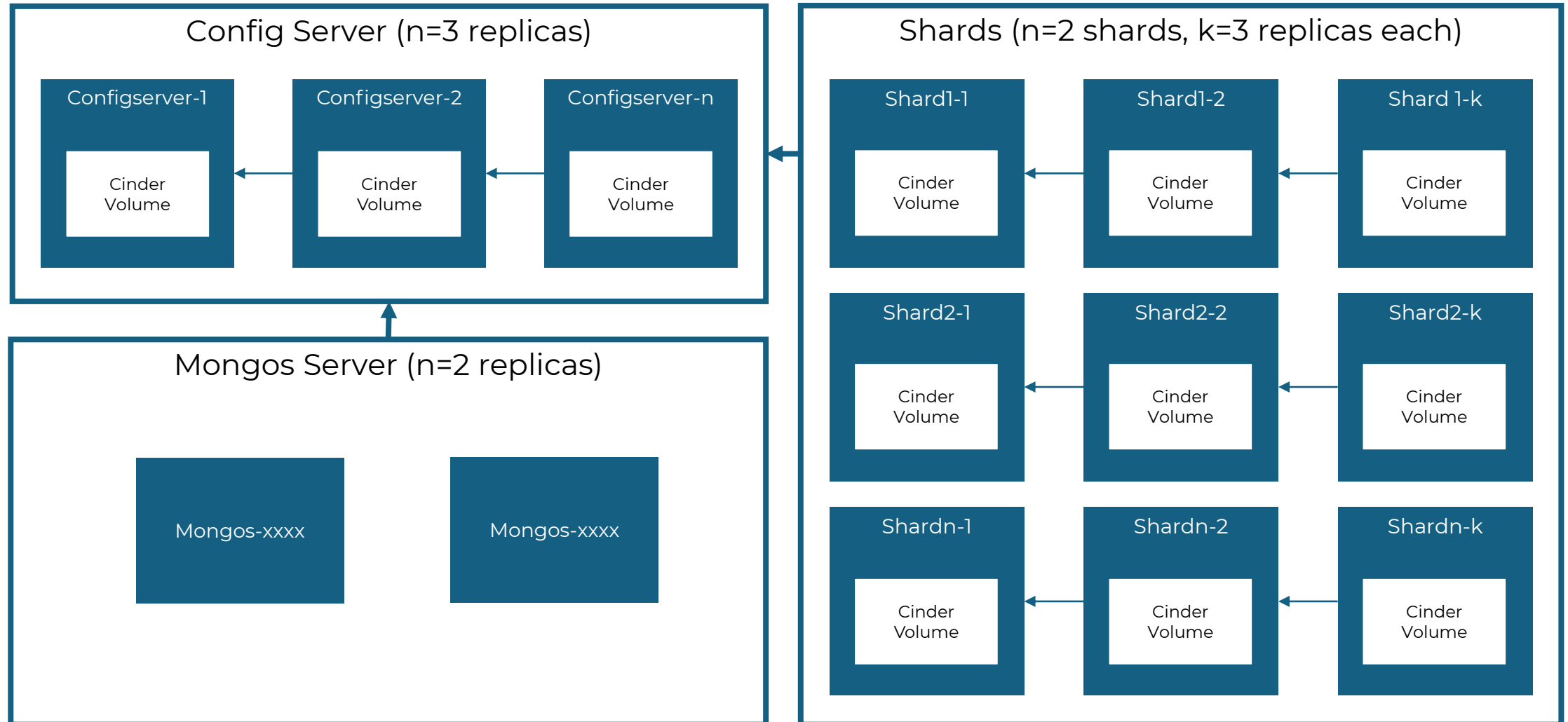
OUR Helm Chart

```
kube/
├── Makefile                # Helm deployment automation
├── HELP.md                 # Quick deployment guide
├── HELM_HELPERS.md         # Detailed Helm commands and MongoDB operations
├── manifests/              # Kubernetes manifests
│   ├── cinder-csi-plugin/  # OpenStack storage integration
│   │   ├── GUIDE.md        # CSI plugin setup guide
│   │   ├── csi-secret-cinderplugin.yaml
│   │   ├── cinder-csi-controllerplugin.yaml
│   │   ├── cinder-csi-controllerplugin-rbac.yaml
│   │   ├── cinder-csi-nodeplugin.yaml
│   │   ├── cinder-csi-nodeplugin-rbac.yaml
│   │   └── csi-cinder-driver.yaml
│   └── SOURCES.md
├── mongo-sharded-cluster/  # Custom Helm chart
│   ├── Chart.yaml          # Chart metadata
│   ├── values.yaml         # Default configuration
│   ├── scripts/
│   │   └── auto-shard.sh    # Automatic sharding setup
│   ├── templates/          # Kubernetes resource templates
│   │   ├── _helpers.tpl    # Helm template helpers
│   │   ├── storage.yaml    # Storage class definition
│   │   ├── add-shards-rbac.yaml
│   │   ├── configmaps/
│   │   │   └── scripts.yaml # MongoDB initialization scripts
│   │   ├── configserver/   # Config server resources
│   │   │   ├── headless-svc.yaml
│   │   │   └── statefulset.yaml
│   │   ├── secrets/        # MongoDB authentication
│   │   │   ├── mongodb-admin.yaml
│   │   │   └── mongodb-keyfile.yaml
│   │   ├── shards/         # Shard resources
│   │   │   └── shard.yaml
│   │   ├── mongos/         # Mongos router resources
│   │   │   ├── deployment.yaml
│   │   │   └── service.yaml
│   │   └── jobs/           # Initialization jobs
│   │       └── add-shards-job.yaml
```

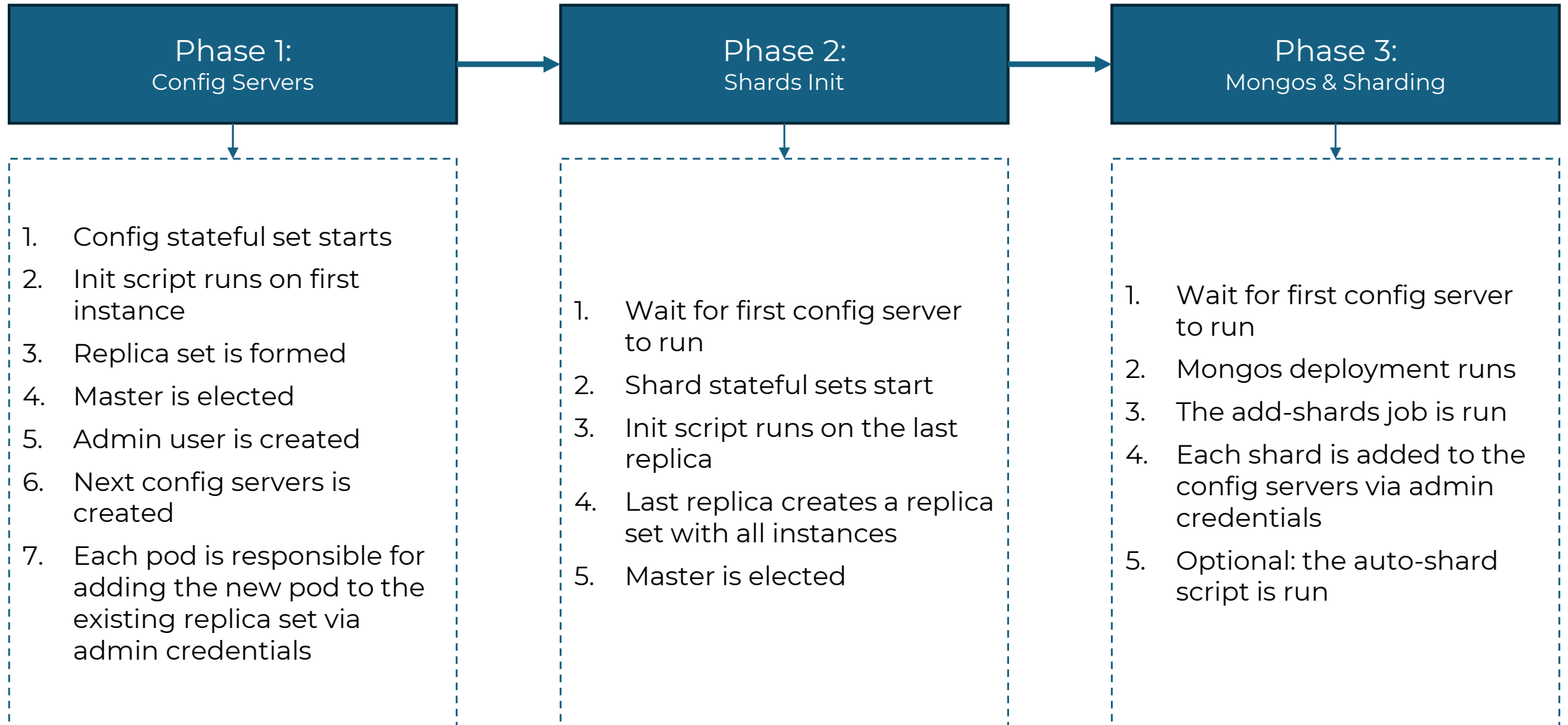
This custom helm chart includes

- Default configuration
- Chart metadata
- Helpers
- Fully customizable values including:
 - Pod and service metadata per function
 - Resource allocation per function
 - Volume allocation and settings per function
 - Cluster count
 - Replica counts per function
- Safe Roll-Overs
- Idempotence (can upgrade shard count, replicas...)
- Consistent storage
- Automatic sharding configuration and scripts
- Different headless services per function
- Authentication using secrets and private keys
- Usage of the Cinder CSI Plugin for volume mounts
- Fully dynamic setup and workflow scripts
- Healthiness probes
- Node port for reachability (load balancer alternative)
- and more...

MongoDB



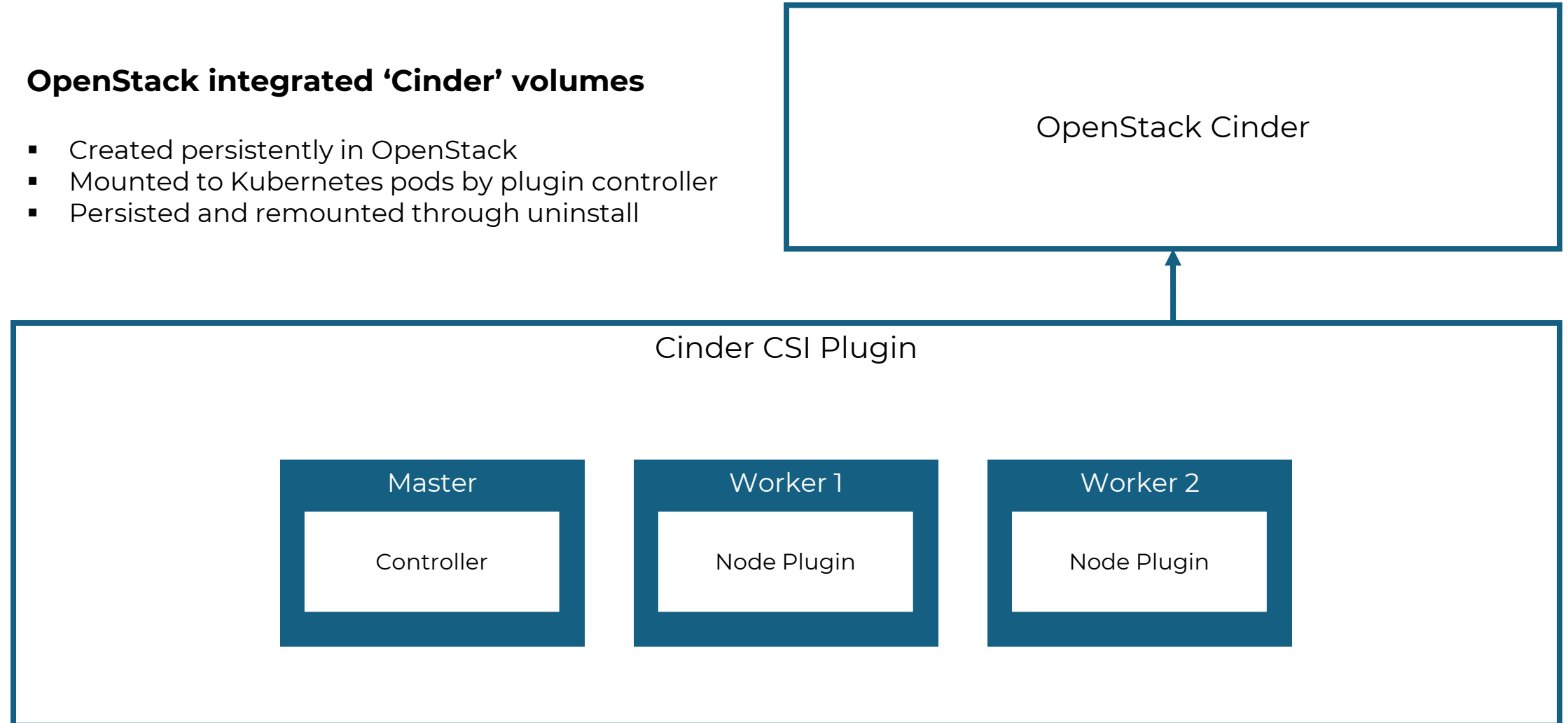
MongoDB Deployment 'Phases'



Storage Layer

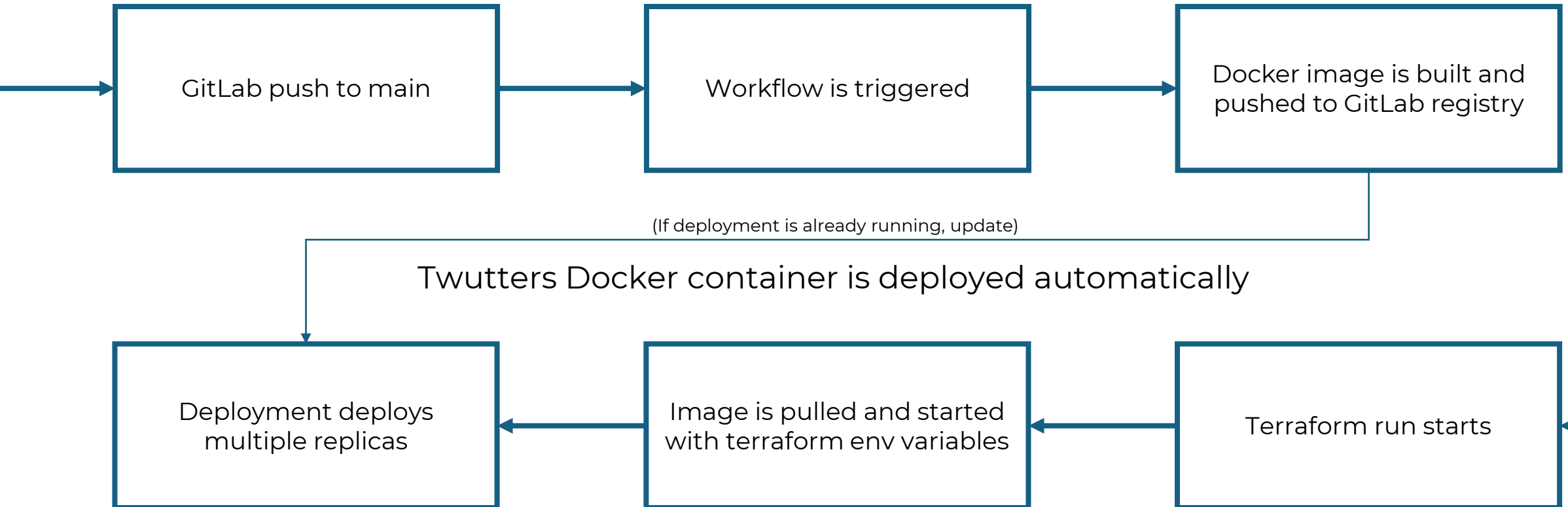
OpenStack integrated 'Cinder' volumes

- Created persistently in OpenStack
- Mounted to Kubernetes pods by plugin controller
- Persisted and remounted through uninstall



Twutter Deployment

Twutter is published via Docker automatically



Terraform Additions

Automatic Helm and Plugin deployment

- Local exec starts the Cinder CSI Plugin
- Hashicorp helm provider starts the helm chart
- Local exec starts Twutter deployment

```
provisioner-mongodb.tf 625 B
1 resource "null_resource" "cinder_csi_plugin" {
2   count = var.setup_mongo ? 1 : 0
3
4   depends_on = [
5     null_resource.local_setup
6   ]
7
8   provisioner "local-exec" {
9     command = "kubectl apply -f ${path.module}/kube/manifests/cinder-csi-plugin/"
10  }
11 }
12
13 resource "helm_release" "mongodb_sharded" {
14   count = var.setup_mongo ? 1 : 0
15   name = "mongodb-sharded"
16   repository = null
17   chart = "${path.module}/kube/mongo-sharded-cluster"
18   namespace = "default"
19   values = [file("${path.module}/values.prod.yaml")]
20
21   depends_on = [
22     null_resource.local_setup,
23     null_resource.cinder_csi_plugin[0]
24   ]
25 }
26
```

Automation can be disabled

- Variable 'setup_mongo' toggles mongo deployment
- Variable 'setup_twutter' toggles twutter deployment
- Makefile can be used to deploy manually

```
provisioner-twutter.tf 541 B
1 resource "null_resource" "twutter" {
2   count = var.setup_mongo && var.setup_twutter ? 1 : 0
3
4   depends_on = [
5     null_resource.cinder_csi_plugin[0],
6     helm_release.mongodb_sharded[0]
7   ]
8
9   provisioner "local-exec" {
10    command = <<-EOT
11    kubectl create configmap mongodb-config \
12      --from-literal=host=${openstack_compute_floatingip_associate_v2.fips[0].floating_ip} \
13      --from-literal=port=30007
14
15    # Apply twutter manifests using kustomize
16    kubectl apply -k ${path.module}/kube/twutter/
17    EOT
18  }
19 }
20
```

(Scratched) Considerations

Create a GitLab pipeline

→ Databases handle important data so a pipelines automatically scaling this type of application would require *great* care, especially when removing shards. This process alone can take days on large datasets.

Also, we cannot create enough resources to enable staging, so testing would become very hard.

Lock connections by cluster IP

→ This feature did turn out to be practically useless as the functions each use their own headless service. Because of this external IPs cannot connect anyways.

Store secrets in a secret manager

→ This was scratched since it does not add value by itself. This could help with workflows or larger organizations. For us simply sharing the Kubernetes secrets directly made more sense.

Add a dashboard with statistics

→ Everything we want to show can be shown via the shell. Dashboard could be added but would only be interesting once the databases have been running for a couple of days.

📄 Feature: Make twutter nicer

📄 Feature: better storage class

📄 Feature: Deployments anstelle von direkt sets

📄 (Optional) Feature: lock by cluster ip

📄 (Optional) Feature: Create a gitlab workflow

📄 Feature: Bulk-create data

📄 Feature: Automatically add shards

📄 Feature: External scripts

📄 Feature: Probes

Dashboard / Monitoring options

Paywall		Open-Source	
MongoDB Atlas	MongoDB Ops Manager	Percona Monitoring and Management (PMM)	Graphana and Prometheus
Easy to use and configure, real-time performance, data explorer functionality	Self-Hosted management, topology visualization, performance dashboards	Open-Source, detailed dashboards, Kubernetes-friendly, made for database analytics	Open-Source, Complete customizability, real-time metrics
Only runs on MongoDB Atlas hosted instances	Requires licensing, created for enterprises	Less customizability, advanced features require use of percona's MongoDB modification (image)	Requires a lot of additional setup, only some templates come out of the box, "jack of all trades" master of none

Tough nuts to crack

Tough nuts to crack



- **Admin user can only be created after the ReplicaSet is initialized**
 - The setup has to wait for the correct timing
- **Admin user can only be created on the primary node**
 - The primary must be identified and specifically targeted
- **Cinder volumes require a CSI plugin to work with Kubernetes**
 - Without the plugin, volume mounting is not possible
- **Local resources were no longer sufficient**
 - Transition to cloud infrastructure was necessary
- **Kubernetes config gets created on dev machine on apply**
 - CI/CD deployment needs to happen on the same machine that starts terraform

Our Application

Twitter

Why did we choose a social network?

- Social platforms involve rich interactions: **users, posts, comments, timelines** – and those create great opportunities to explore **real-world challenges** in distributed systems, like horizontal scaling and NoSQL data modeling.
- It's the ideal playground to test bulk operations, and performance under high load.

General scenario

- In our MongoDB setup, the three key collections are:
 - users: stores profiles
 - posts: the main content users create
 - comments: user-generated replies tied to posts
- The project uses **Next.js** both for the frontend and backend logic (via API routes).

On the frontend, we use React and built-in fetch methods to communicate with our APIs.

Each API route directly talks to MongoDB, performing **CRUD** operations.

Why did we shard certain collections the way we did?

- **Posts**

- Wir haben posts per Hash geshardet (z. B. über _id)
- Alternative wäre Sharding nach author
- Warum Hash?
- → Feed-Abfragen rufen viele verschiedene Autoren ab
- → Hash verteilt die Daten gleichmäßig
- → Vermeidet Überlastung einzelner Shards

- **Comments**

- Comments sind nach postId geshardet
- Alle Kommentare zu einem Beitrag liegen auf demselben Shard
- Gut für: Post-Ansichten und Kommentar-Zählungen

- **Users**

- Auch users wurde per Hash geshardet
- Vorteil: gleichmäßige Verteilung der Nutzer über alle Shards

Diese Konfiguration wurde bewusst für unser Testszenario gewählt. In produktiven Systemen kann je nach Zugriffsmuster ein anderer Shard-Key sinnvoll sein.

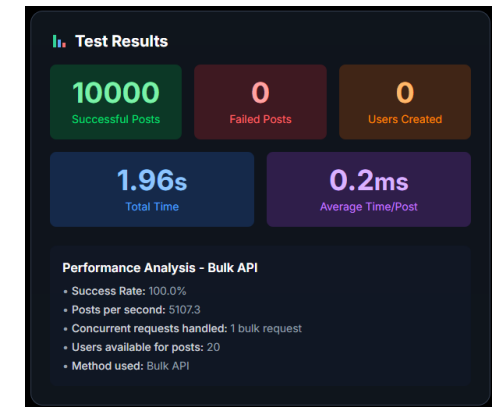
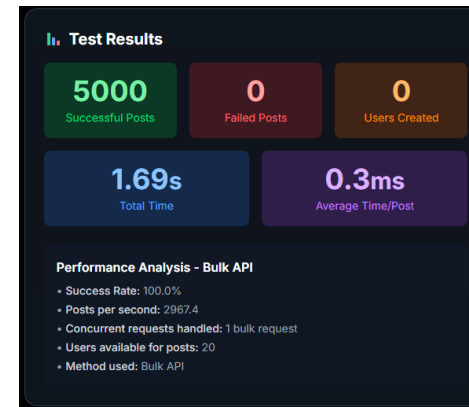
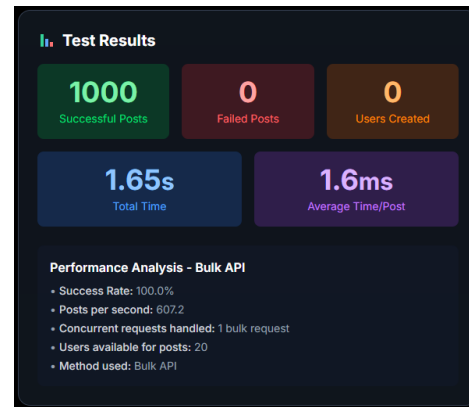
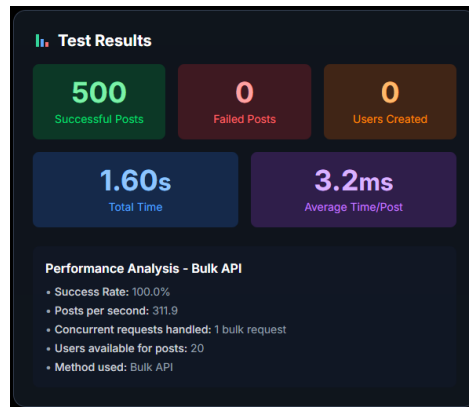
Live demo

Appendix

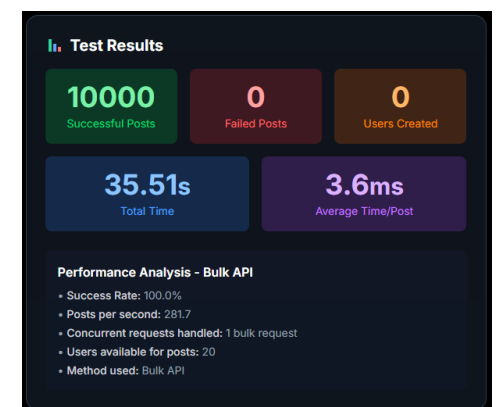
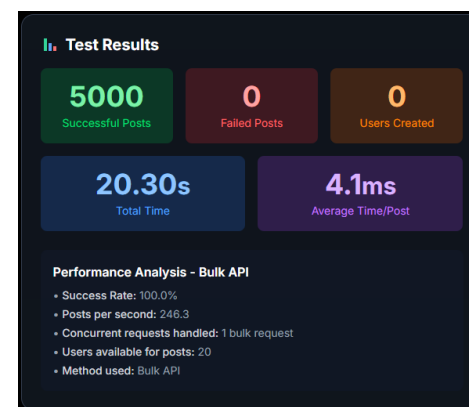
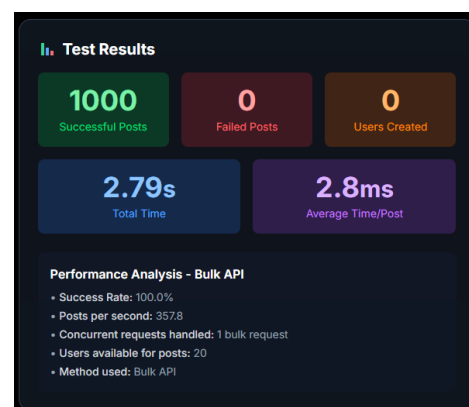
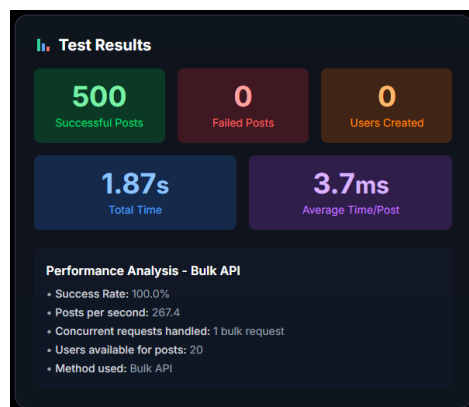
MongoDB Load Testing

Load Tests - Bulk

Local

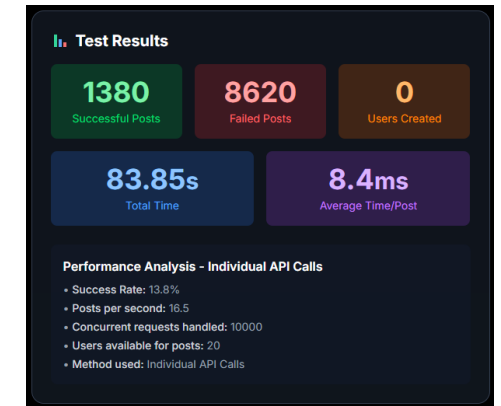
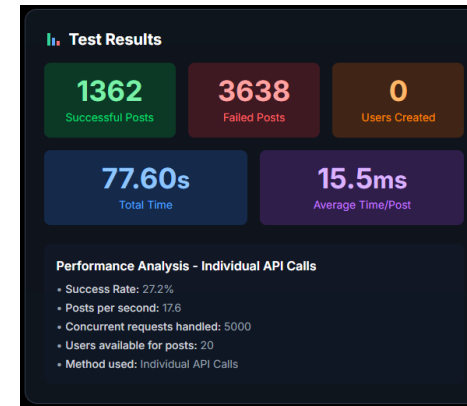
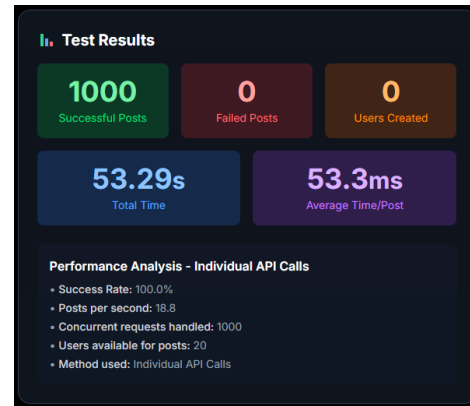
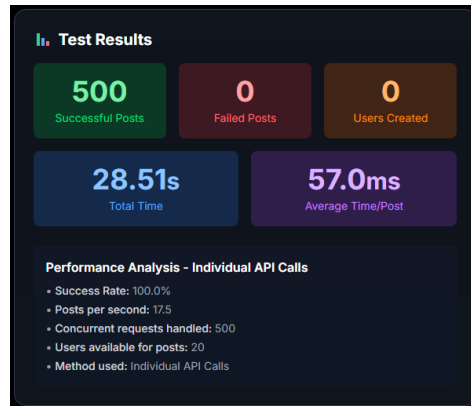


Shared

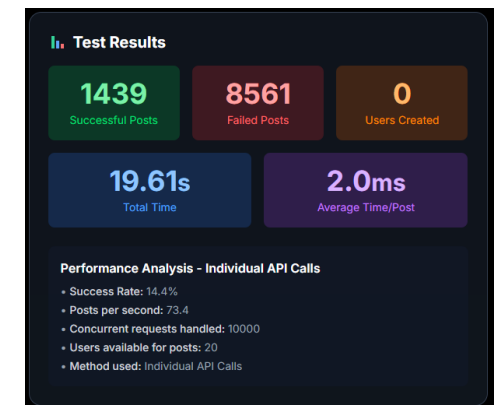
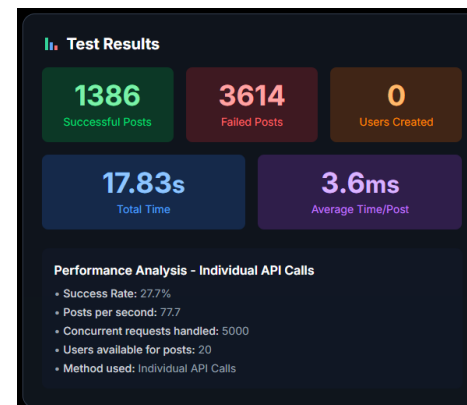
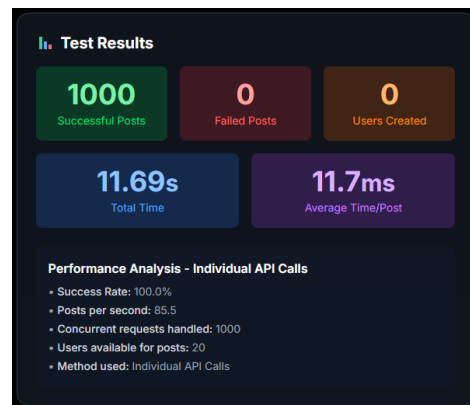
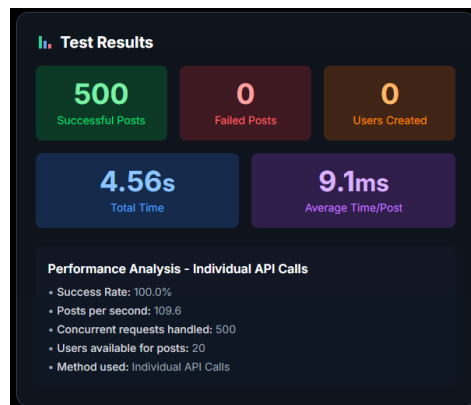


Load Tests - Individual

Local

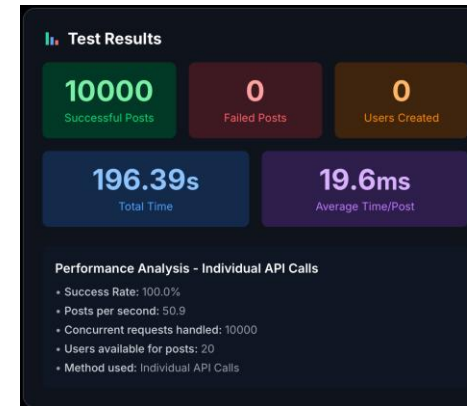
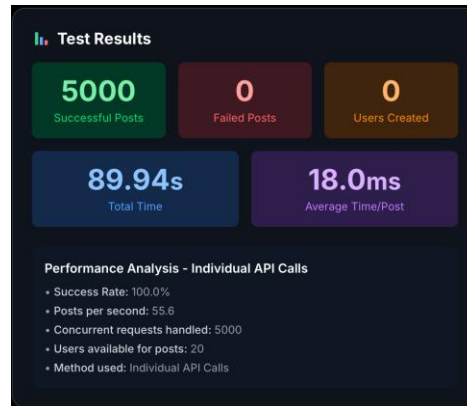


Shared

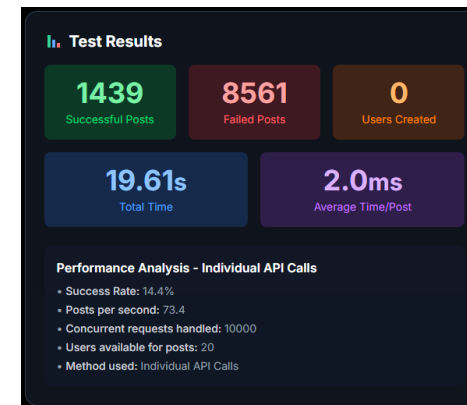
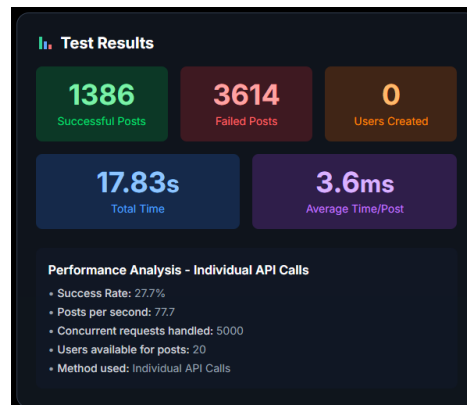


Load Tests Sharded - Individual

Backoff

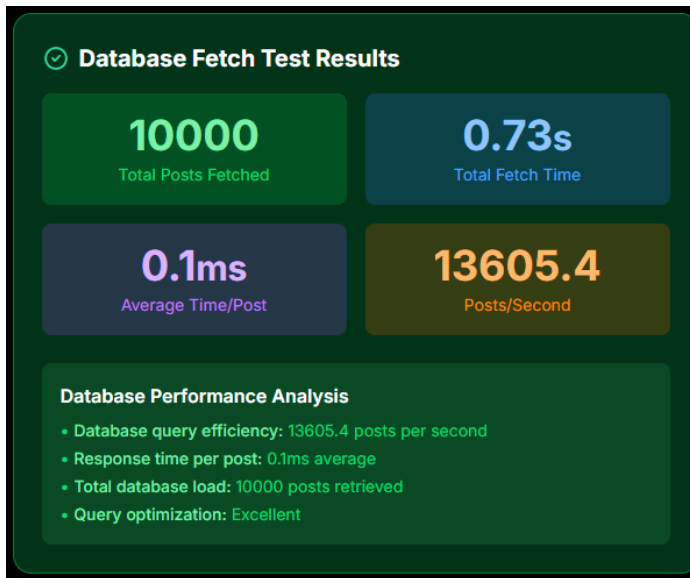


Single Attempt

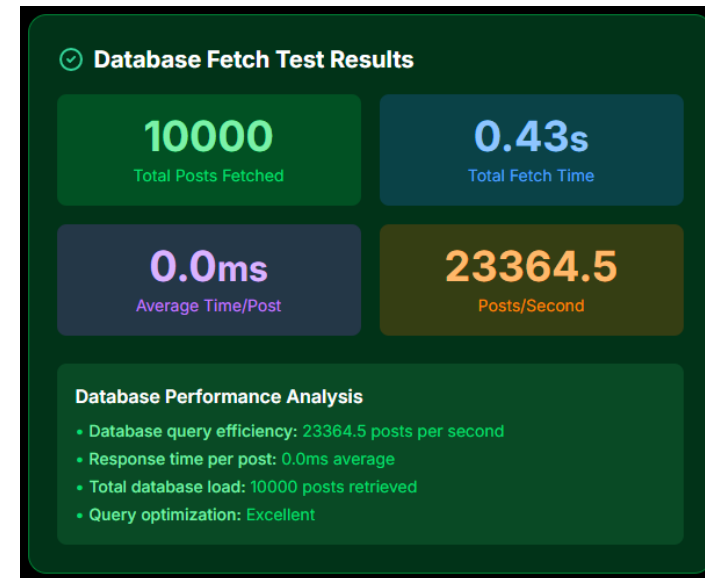


Fetching

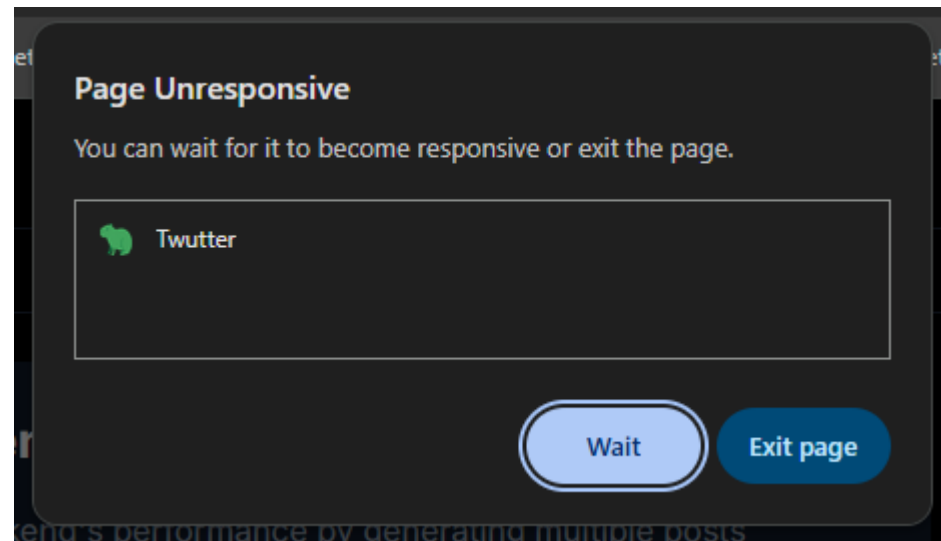
Sharded



Local



10000 requests local + individual



Maximaler relativer Speedup nach Amdahl

- $S_{\max} := S_R(p \rightarrow 4) = 1 / \beta$
 - $\beta = 50\% \rightarrow S_{\max} = 2$
 - $\beta = 10\% \rightarrow S_{\max} = 10$
 - $\beta = 5\% \rightarrow S_{\max} = 20$
 - $\beta = 1\% \rightarrow S_{\max} = 100$
- **Mögliche Schlussfolgerung:** „Da selbst triviale parallele Programme immer einen sequentiellen Anteil aufweisen, lohnt sich Parallelisierung nicht wirklich.“
- **Einwand:** Das Gesetz von Amdahl betrachtet nicht skalierbare parallele Systeme; hier sind p und β nicht mehr unabhängig.

-> Das Ziel ist nicht die Laufzeitoptimierung bei kleinen Datenmengen, sondern die Ermöglichung der Handhabung von großen Datenmengen.