

The
Pragmatic
Programmers

Deploying Rails Applications

A Step-by-Step Guide



*Ezra Zygmuntowicz
and Bruce Tate*

The Facets



of Ruby Series

What readers are saying about *Deploying Rails Applications*

Deploying Rails Applications is a fantastic and vastly important book. Many thanks!

► **Stan Kaufman**

Principal, The Epimetrics Group LLC

I've used the section on setting up a virtual private server to get up and running on three different VPS instances in less than thirty minutes each. Your book has saved me days of time preparing servers, letting me focus instead on writing code. Your book also has the best Capistrano tutorial I've ever read. It's no longer a mystery, and I'm now writing custom deployment tasks. I can't wait to get my final copy!

► **Barry Ezell**

CTO, Balance Engines LLC

Prior to buying this book, I had to spend hours scouring the Web to find this kind of information. Having it all in one place (and correct!) helped me deliver a successful Rails project. Thank you!

► **Eric Kramer**

Programmer, Nationwide Children's Hospital

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Raleigh, North Carolina Dallas, Texas



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Chapter 1

Introduction

Building Rails apps brings the joy back into development. But I, Ezra, have a confession to make. There was a brief moment that I didn't like Rails at all.

I'd just graduated from the five-minute tutorial to developing my first real Rails application. The helpers, plug-ins, and generators reduced the amount of code I needed to write. The logical organization and layout of the files let me painlessly find what I needed, and the domain-specific languages in Active Record let me express my ideas with simplicity and power. The framework bowed to my will, and aside from a few trivial mistakes, I finished the app. Pure joy washed over me.

But then, it was time to deploy. Deployment means moving your application from a development environment into a home that your customers can visit. For a web application, that process involves choosing a host, setting up a web server and database, and moving all your files to the right places with the right permissions.

I quickly discovered that after the joy of development, deployment was a real drag. All those waves of euphoria completely disintegrated against the endless stream of crash logs, Rails error pages, and futile install scripts. I spent hours wading through the Rails wikis, blogs, and books for answers, but each one gave me a mere fragment of what I needed. Much of the information I found was contradictory or flat-out wrong.

Deployment also involves making the best possible environment for your customers, once you've settled into your new home. There, too, I failed miserably. When I finally made my site work, it was too slow. Stumbling through page caching seemed to make no difference, and

my end users watched the spinning (lack of) progress indicator in frustration. I struggled to fix memory leaks, broken database migrations, and worthless server configurations until eventually my site purred in appreciation. Then came success, which means more visitors, followed by more failure. I screamed some choice words that would make a sailor's dead parrot blush. No, at that moment, I really didn't like Rails.

I'm not going to sugarcoat it. If you don't know what you're doing, Rails deployment can stretch the limits of your patience, even endurance. What's worse, Rails deployment suffers especially in areas where Rails development is easy:

- You can always find plenty of Rails development documentation, but when it's time to deploy, you can often find only a fraction of what you need. People just seem to write more about development than deployment.
- You can choose your development platform, but you can't always choose your deployment platform. Most hosts with Rails support run some variant of Linux; others run FreeBSD or Solaris. And the software stack for different hosts can vary wildly, as can application requirements.
- When your development application breaks, you can find mountains of information through breakpointing, rich development logs, and the console. In production, when things go south, there are fewer sources of information, more users, and more variables. You might encounter a problem with the operating system, your application server, system resources, plug-ins, your database server, or any one of dozens of other areas. And your caching environment works differently than your development environment.
- Rails is an integrated platform that narrows the choices. You'll probably use Active Record for persistence and Action Pack for your controllers and views. You'll use Script.aculo.us and Prototype for Ajax. But your deployment environment will require many choices that are not dictated by Rails, including the most basic choice of your web server.

But I'm living proof that you can learn to master this beast. Over time, I've come to understand that my approach to deployment was rushed, as well as a little haphazard. I found that I needed to approach deployment in the same way that I approached development. I had to learn how to do it well, effectively plan each step, and automate as much as possible so I left little to chance. I needed to plan for problems so

I could anticipate them and get automatic notification at the first sign of trouble. At my company, Engine Yard, I support some of the largest and most popular Rails sites in the world. I want to help you learn to do the same.

Because Rails is so new, some people question whether *anyone* can deploy a sophisticated, scalable, and stable Rails application. Based on my experience at Engine Yard, I'd like to first debunk a few myths:

Myth: The Ruby on Rails development framework is much more advanced than the deployment framework.

That's false. Deployment tools for Rails get much less attention, but they are also growing in form and function. If you know where to look, you can find deployment tools that are proven, effective, and free to use. These tools use techniques that are every bit as advanced and functional as those used by the most mature Java or C# development shops. Ruby admins can deploy a typical Rails application with one command and move back to a previous release should that deployment fail, again with one command. You can deploy Rails to simple single-server setups or multiserver sites with very few changes. And if you now copy PHP files to your server by hand or rsync Perl scripts to multiple machines, your life is about to become a lot easier (and yes, you can use some of these same tools as well). I'll show you how to do these things in Chapter 5, *Capistrano*, on page 92.

Myth: Rails is too new to have any large, sophisticated deployments.

That, too, is false. Ruby on Rails is in use on very large sites that are spread across multiple machines. Some of those applications require many full servers just to serve their full feature set to their community. And the list of large Rails sites grows daily. Twitter, Basecamp, and 43 Things are all multiserver large Rails sites. Many more enter production every month.

Myth: The Ruby language is inherently unstructured and is poorly suited for web applications.

That's mostly false. Ruby is an interpreted, dynamically typed language that presents real challenges in high-volume production settings, but the Rails framework has features and strategies that mitigate many risks associated with these challenges. The Rails caching model and performance benchmarking tools help developers to build high-performance sites. The Rails testing frameworks, sometimes in combination

with other Ruby testing frameworks, help developers catch errors that a compiler might catch in a statically typed language. And the Rails shared-nothing architecture, like many of the highest-volume Internet sites in existence, allows Rails sites to scale by adding additional hardware. You'll learn how to cluster in Chapter 7, *Scaling Out*, on page 144.

Myth: Rails can get you into trouble, if you don't know what you're doing.

That one is true. If you want to stay out of serious trouble, you need to know how to wield your chosen tools. No development language is immune to bad design. And a poor deployment strategy will burn you. You must always arm yourself with knowledge to protect yourself. In this book, I hope to help you do exactly that.

Rest assured that the Rails deployment story is a good one. You *can* learn to predictably and reliably deploy your applications. You *can* use repeatable techniques to understand what the performance characteristics of your system are likely to be. And you *can* improve the stability and scalability of your system given knowledge, time, and patience. I'm going to start quickly. I want to walk you through the same deployment road map that every Internet application will need to use.

1.1 The Lay of the Land

Web 2.0, the new buzzword that describes a new class of web applications, sounds like a daunting mix of new technologies that radically change the way you think about the Internet. But when you think about it, from a deployment perspective, Web 2.0 doesn't change much at all:

- The Internet still uses the same communication protocols and the same type of web servers.
- You still scale Internet applications the same way, by clustering.
- You can even use some of the same servers, and the new ones work mostly like the old ones.
- You still keep your source code in source control.
- The operating system is still usually Unix-based.

For all the talk about the way your applications may change, deployment remains *precisely the same*. Think of the Internet as a road map.

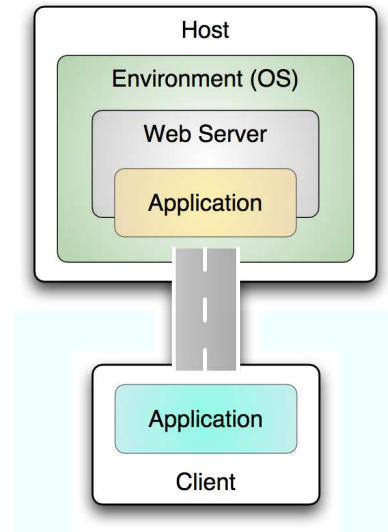


Figure 1.1: Basic deployment map

The buildings and places are servers, browsers on clients, routers, firewalls, and balancers. The roads are the networks between them and the various communication protocols those networks use. I like the map analogy because when all is said and done, the Internet is all about moving data from one place to another.

When you deploy, you're using the Internet to move your application from one place to another. You can think of every deployment story as a map. In fact, every deployment story in this book will come with a map. A generic version of the simplest possible deployment story is shown in Figure 1.1.

Look at the components of that figure. First, you have a host with an environment. I'll spend much of this book showing you how to build the environment that will host your application. The environment, in this case, includes all the different components that an Internet application needs. You'll learn to build each of these pieces yourself or rely on another vendor to build those pieces for you. Those pieces will include the operating system, the Ruby language, the Rails framework, and the various pieces that will tie them together. The host represents where your customers will go to find your application. As you can well imagine, that host image will get much richer as I take you through the various pieces of this book.

You also see a development client. My machine is my trusty MacBook Pro, but I've also developed on the Windows platform. You might think that this book is about the road that goes from the application on the client to the server. And I'll start the book that way. The basic deployment map (shown in Figure 1.1, on the previous page) will use plain old FTP to move your application from the client to the server.

Deployments are rarely as simple as the one you see in Figure 1.1, on the preceding page. You're going to find that shared hosting is a little limited. And you probably know that plain old FTP may be simple, but it will not handle the demands of effectively managing the site. You will need better deployment tools. You will want to throw a source control repository into the mix. If you're lucky, one web server may not be enough. You'll wind up with a more sophisticated map, like the one in Figure 7.1, on page 147.

In the complete map, you see a vastly different story. What may appear as one site to the user has its own environments. The first change is the website. You can no longer assume a single host. Those environments might be virtual environments that all reside on a single machine, or each individual environment could have its own hardware. Your deployment strategy will have to install your application into each Rails environment. You will need to configure the pieces to work together. And that's the subject of this book.

In the first few chapters, you might think that we're oversimplifying a little bit. Don't worry. You're not going to be using FTP or shared hosting by the time you finish this book. I'll get to the second map. I'll just build it slowly, one piece at a time. We'll keep extending the map throughout the book until you get to your eventual goal. In the next section, I'll walk you through what you can expect in the chapters to follow.

1.2 Finding a Home

You've seen that our maps have one goal in mind. They want to get your development code to its eventual home in the best possible way. By now, you also know that the type of map you need depends on where your application is going to live. You can't adequately understand deployment unless you understand where you're going to put your code, but finding a platform for your Rails code is hard. The process feels like finding a home without a real estate agent, the Internet,

or any consolidated home buyer guides. Over the course of this book, I'd like to take you into that hidden universe. You will learn how to:

- develop Rails applications with painless deployment in mind;
- choose between shared hosts, virtual private servers, or dedicated servers;
- understand the software stack that the pros use to deploy Rails for high performance;
- build and configure your web servers and other services;
- stress your application before your users do; and
- streamline your application in production using advanced strategies such as caching so your site can scale.

Throughout this book, I'll treat deployment like buying a new home for your application. Through each of the chapters, you'll learn to pick and prepare your home, streamline your stuff for everyday living, and even move up into wealthier neighborhoods, should you ever need to do so. Let me take you on a guided tour of the book:

Packing up: tending to your application. Before you can move, you need to pack up. If you want a good experience, you need to organize your stuff to prepare for your move. On Rails, that means minding your application. You will need to prepare source control. You will also need to make some important decisions that will have a tremendous impact on your production application, such as the structure of your migrations and your attention to security. This chapter will add source control to your map.

Finding a starter home: shared hosting. Not everyone can afford a house. When most of us leave home, we first move into an apartment building or a dorm. Similarly, most Rails developers will choose some kind of shared hosting to house that first application: a blog or a simple photo log. Shared hosting is the first and cheapest of the hosting alternatives. Setting up shared hosting involves many of the same steps as moving into your first apartment: find a home that meets your requirements, set up your address so that others can find you, and customize your home as much as possible. Like apartment living, shared hosting has its own set of advantages and disadvantages. Shared hosting is cheap, but you need to learn to be a good citizen, and you'll also likely encounter those who aren't. In this chapter, you'll learn to find and make the

best use of your first home. The deployment will be simple. You'll need a shared host, a simple application, and a simple mechanism such as FTP to ship your code up there.

Moving up: virtual and dedicated hosting. After you've lived in an apartment for a while, you might decide to move up to your own home or condo. Your virtual world is the same. When shared hosting isn't enough, you can move up to virtual and dedicated hosts. Moving up to a home carries a whole new set of benefits and responsibilities: you get more freedom to add that extra closet you've always wanted, but you also have to fix the toilet and mow the lawn yourself. Dedicated and virtual hosts are like your own home or condo. These plans are typically more robust than shared hosts, but they also require much more knowledge and responsibility. When you set up your own host, you take over as landlord. You need to know how to build and configure your basic software stack from your web server to the Rails environment. This chapter will walk you through building your hosting platform. Your map will get a little more complicated because you'll have to build your environment, but otherwise, it will be the same.

Moving in: Capistrano. After you've chosen and prepared a place, you can move in. Unlike moving in your furnishings, with Rails you will probably move in more than once. You'll want to make that move-in process as painless as possible, automating everything you possibly can. Capistrano is the Rails deployment tool of choice. In this chapter, you'll learn to deploy your application with Capistrano using existing recipes with a single command. You'll also learn to roll back the deployment to the previous version if you fail. You will also see many of Capistrano's customization tools. This chapter will change your map by building a better road between your application and the deployment environment.

Adding on: proxies and load balancing. When your place is no longer big enough, you need to add on or move up. Since we have already covered moving up, this chapter will cover adding on through clustering. One of the most common and effective ways to remodel a Rails deployment without buying a bigger plan is to separate the service of static content and application-backed dynamic content. In this chapter, you'll learn to reconfigure your production environments to handle more load. I'll show you setups with Apache and nginx serving static content and dynamic content

with Mongrel. You'll also learn how to distribute your applications across multiple servers with a rudimentary load-balanced cluster. I'll also walk you through potential database deployments. The host side of your deployment map will get much more sophisticated because you'll be deploying to a cluster instead of a single host, but with Capistrano already in the bag, you won't have to change the client side at all.

Planning for the future: benchmarking. As you grow older, your family may grow. Without a plan, your house may not be able to accommodate your needs a few years from now. In Rails or any other Internet environment, capacity planning becomes a much larger problem, because your home may need to serve hundreds of times the number of users it does today. To get the answers you need, you have to benchmark. After you've chosen your stack and deployed your application, you'll want to find out just how far you can push it. In this chapter, you'll learn to use the base Ruby tools, and a few others, to understand just what your environment can handle. You'll also learn a few techniques to break through any bottlenecks you do find. The deployment map won't change at all.

Managing things: monitoring. As you live in your new home, you'll often find that you need help managing your household. You might turn to a watchdog to monitor comings and goings, or you might want to hire a service to do it for you. With the many Rails configuration options, you'll be able to manage some of your installation yourself. You can also use an application called Monit to automatically tell you when a part of your system has failed or is about to fail. You will make only subtle adjustments to your map to allow for the additional monitoring of the system.

Doing windows: deploying on Windows. Homeowners hate doing windows. Rails developers often do, too. But sometimes, you don't have a choice. When you do have to deploy on Windows, this chapter will walk you through the process. We'll keep it as simple and painless as possible. This chapter will focus on the host side of the map to offer the Windows alternative as you build out your environment on Windows.

When you've finished the book, you'll know how to pick the best platform for you. You'll understand how to make Capistrano finesse your application from your development box to your target environment. And

you'll be able to configure a variety of deployment scenarios from the inside out. If you've built up any resentment for Rails because of deployment problems in the past, this book should get you back on the path to enjoying Rails development again.

1.3 Conventions

Throughout this book, you'll see several command-line terminal sessions that show various deployment, setup, and configuration tasks. You'll need to make sure you type the right command in the right place. You wouldn't want to accidentally clobber your local code or accidentally load your fixtures to your production database (destroying your data in the process!). To be as safe as possible, I will follow a few conventions with the command-line prompts to make it easier to follow along.

On most Unix-like systems, when the command-line prompt is the number sign (#), it is letting you know that you are logged in as root. When the prompt is the dollar sign (\$), you are logged in as a regular system user. These are the conventions for the Bourne Again Shell (bash). If you are running another shell, you might have slightly different indicators in your prompt, and you should adjust accordingly. On the Ubuntu system we are about to set up, the default shell is bash.

The following prompts show how you should log in to run the various shell commands we use in the book. When you should be logged in as root, the prompt will look like this:

```
root#
```

When you should be logged in with your regular user account, the prompt will look like this:

```
ezra$
```

When you should be running a command from your local computer and not the server, the prompt will look like this:

```
local$
```

1.4 Acknowledgments

Collectively

We'd like to thank DHH and the Rails core team for giving us Rails, because none of this would have been possible without their innovations. We'd also like to thank the Rails and the Ruby community

as a whole. We send thanks to the Capistrano and Mongrel teams for advancing the early deployment story for Rails. This is one of the friendliest and most helpful communities that we have had the pleasure of knowing. Above all, thanks for the generosity of Brian Hogan and Geoffrey Grosenbach for your invaluable contributions to this book.

Clinton Begin

“I promise, I’ll never write another book.” That’s what I told my wife, Jennifer, after my first book. So, I’d like to start out by thanking her, both for accepting my apology and for her selfless support throughout this process. Being a part-time author robs us dads of valuable family time and mothers of much-needed break time. After a few trial-by-fire experiences, I can attest to the fact that Stay-at-Home Mother is a far tougher job title than any I’ve ever held. I’d also like to thank my two sons, Cameron and Myles, for teaching me more about myself each and every day.

Outside of my family, I’d like to thank Bruce and Ezra for inviting me to work on this book with them. It was an opportunity to tackle a very important subject that most Rails books gloss over and simply run out of space in their attempt to cover it. I’d also like to thank ThoughtWorks, as they helped launch my career and gave me my first opportunity to work with production Rails deployments. ThoughtWorks has some of the brightest Ruby and Rails minds out there, including Alexey Verkhovsky and Jay Fields. Finally, I’d like to thank Dave Thomas. Three years ago I challenged him by asking cockily “What does Ruby have over other toy languages?” In a way that only Dave Thomas could respond, he simply didn’t and mailed me a book instead.

Bruce Tate

I never thought I’d be writing a book on Ruby on Rails deployment. My gift is as a programmer. As a manager and programmer on larger Internet projects, I simply give the deployment task to others. Thanks to Dave, Andy, and Ezra for the invitation to help tackle this important gap in Rails literature. Thanks also go to my boss, Robert Tolmach, who has become one of my best friends who trusted me to make some radical bets with his money. He shared some time with me to make this book possible so that others may benefit from what we’ve learned at WellGood LLC with ChangingThePresent. Thanks go out especially to Clinton Begin, who jumped into this project at the very last minute and wrote the most important chapter in the book, giving us a much-needed jolt of productivity when we most needed it.

If these acknowledgments read like a broken record, it's only because those we love make extreme sacrifices to satisfy our addiction to writing and technology. Thanks to Maggie, Kayla, and Julia for sharing me with the written word. This is far from the first book, and with luck, it won't be the last. My love for each of you grows always.

Ezra Zygmuntowicz

I'd like to thank my wife, Regan, for being so understanding and supportive. There were many weekends and evenings that I should have spent with her but instead worked on the book. I'd also like to thank all the folks who helped proofread and critique the content as it changed and morphed into the final result. I'd also like to thank all of my wonderful coauthors for their contributions; I truly could not have done this without all of the help. Special thanks go out to François Beausoleil who helped me with some early svn stuff way back when we started pulling this book together. And thanks to Geoffrey Grosenbach for all of your critical early contributions.

Brian Hogan

I first need to thank Ezra for the opportunity to contribute to this book and Bruce for introducing me to Ruby at a point in my life when I was about to quit programming because of frustration. Without their help and guidance, I would not be where I am today. Zed Shaw deserves credit as well because he challenged me to make it work on Windows, and Luis Laverna is my hero for making Mongrel run as a Windows service, which made my job a lot easier.

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Finally, thanks to Erich Tesky, Adam Ludwig, Mike Weber, Chris Warren, Chris Johnson, and Josh Swan. You guys are the best. Thanks for keeping me going.

Chapter 2

Refining Applications for Production

Before you can move into your new house, you need to pack up. With Rails, you need to do the same thing: prepare your Rails application for deployment.

You'll need to organize your code and prepare it for production. Specifically, you'll need to think about a few things:

- Making your source code repository work smoothly with your production setup to make your deployments go smoother and be more secure
- Strengthening your brittle migrations to save you from models that change and developers who collide
- Locking down Ruby, Rails, and Gems code to a single, stable version

Fundamentally, you want to build every application with deployment in mind. The earlier you think about deployment issues, the better off you'll be.

I'm not saying you need to make early deployment decisions at demand time. You just need to make sure you build intelligent code that is less likely to break in production situations. Your first order of business is to simplify your Subversion setup.

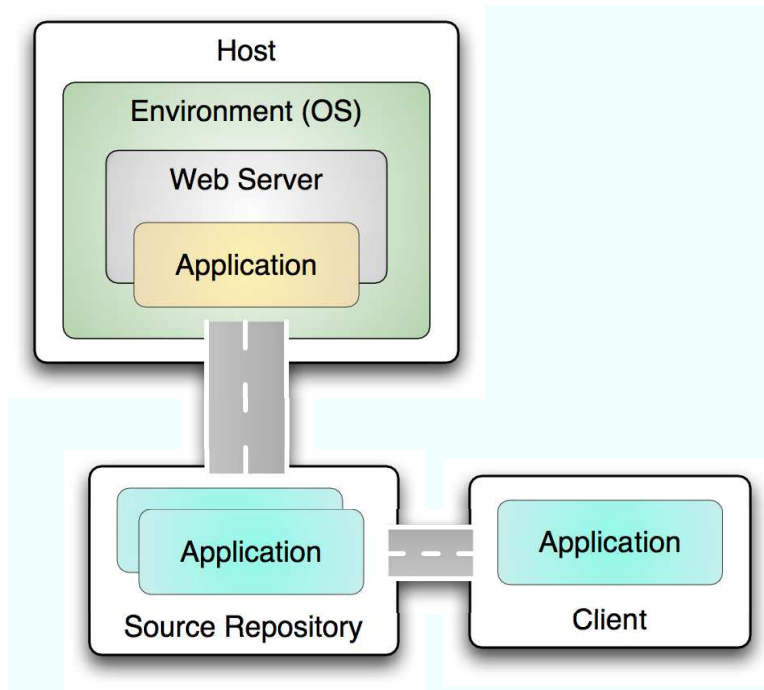


Figure 2.1: Application map

2.1 The Lay of the Land

The first enhancement to the basic deployment map is shown in Figure 2.1. The following list explains what you'll need to accomplish in this chapter:

- Set up source control. If you haven't already done so, setting up source control will make the rest of your deployment picture much simpler and will improve your development experience as well.
- Prepare your application configuration and performance. You will make some simple changes to your application or, better yet, build it right the first time.

The three Rails environments—development, test, and production—will make it easy for you to isolate configuration for deployment. The rest is just common sense. It all starts with source control.

2.2 Source Code Management

Good deployment strategies always start with a good foundation. I want to be able to deploy the same application to my servers with identical results every time. That means I need to be able to pull a given version of the application from a central source. Anything less won't give me dependable, repeatable results. Luckily, Rails will automate a whole lot of the deployment scripts, but only if you use the common infrastructure that other Rails developers do.

Unless you have a strong reason to use something else, you'll want to use Subversion for your application's source code control. The majority of Rails developers use it, the Rails team uses it for Rails, and the Rails plug-in system also uses it. *Version Control with Subversion* [PCSF04] is a great book about Subversion. You should also check out *Pragmatic Version Control* [Mas05] for a pragmatic view of source code control in any language. For this chapter, I'm going to assume you already have Subversion installed and running.

Subversion on Rails

The keys to using Subversion with Rails are maintaining the right structure. You want to keep the right stuff under source control and keep the wrong stuff out. Setting up your application's repository right the first time will save you time and frustration. A number of items in a Rails application do not belong in source control. Many a new Rails developer has clobbered his team's `database.yml` file or checked in a 5MB log file. Both of these problems are with the Subversion setup, not with Rails or even the Rails developer. In an optimal setup, each developer would have their own `database.yml` file and log files. Each development or production instance of your application will have its own version of these files, so they need to stay out of the code repository. You might already have a Subversion repository already, but I'll assume you don't and walk you through the entire process from scratch.

Repository Creation

Start by creating a new Subversion repository for your Rails project. Log in to the server that will have your Subversion repository. Create a directory for your repository, and let Subversion know about it:

```
$ svnadmin create /home/ezra/svn
```

The authors of Subversion recommend creating all repositories with three folders at the root: `trunk`, `tags`, and `branches`. This setup works best

if you have one project per repository.¹ You don't have to create the top-level folders for Subversion to work, but I suggest you do so. The better Subversion repositories I have seen adhere to this convention, and if you have only one project in your repository, this approach will let you tag and branch at will. These commands will build your initial directories:

```
$ svn mkdir --message="Initial project layout" ↵
    file:///home/ezra/svn/trunk file:///home/ezra/svn/tags ↵
    file:///home/ezra/svn/branches
Committed revision 1.
```

Importing a Simple Rails Application

I suggest you practice with an empty Rails project first. Create the Rails application as usual:²

```
$ rails ~/deployit
  create
  create  app/controllers
  ...
```

At this point, you could do an `svn import` and put the whole directory tree in the repository. I recommend against doing so. If you use the “in-place import” procedure instead, you can selectively commit the pieces you want, not the whole tree. See Subversion’s “How can I do an in-place import” FAQ for the full details.

Start your in-place import by checking out trunk into the folder you want to import:

```
$ svn checkout file:///home/ezra/svn/trunk ~/deployit
Checked out revision 1.
$ cd ~/deployit
```

Next, add the whole tree to the working copy. The results are no different from `svn import` initially, except all changes are local to the working copy and you can selectively revert the files and folders you do not want in the repository before committing. The end result is more convenient control over what actually becomes part of the repository. We use `svn import` with the `--force` option because otherwise Subversion will fail with an error indicating that the current directory is already under version control.

1. This is explained in more detail in “Choosing a Repository Layout” in the Subversion book.

2. If you have an existing project you want to import in Subversion, simply skip this step. All other steps are identical.

Now, add your Rails project like so:

```
$ svn add . --force
A      app
...
A      README
```

The Rails command helpfully creates most of the tree. Since I will later use migrations in all my Rails projects, I immediately create the db/migrate folder. Rails also creates a tmp folder when it needs it. For completeness sake, I will create both folders immediately:

```
$ svn mkdir db/migrate tmp
A      db/migrate
A      tmp
```

Removing the Log Files from Version Control

At this point, Subversion would helpfully track all changes to the log files. Then some following Friday at 6:30 p.m., some poor, harried developer would then accidentally check in an obscenely large log file, and the rest of the developers would complain that the checkout was taking way too long. To ease our burden, the easiest thing is to tell Subversion to ignore any log files:

```
$ svn revert log/*
Reverted 'log/development.log'
Reverted 'log/production.log'
Reverted 'log/server.log'
Reverted 'log/test.log'

$ svn propset svn:ignore "*.log" log
property 'svn:ignore' set on 'log'
```

That's all there is to it. Next stop: database.yml.

Managing the Database Configuration

Since database.yml file might be different for each developer, you do not want to create havoc by accidentally committing database.yml. Instead, you'll have a sample of the file in the repository so each developer will have their own safely ignored database.yml file. These commands do the magic:

```
$ svn revert config/database.yml
Reverted 'config/database.yml'

$ mv config/database.yml config/database.yml.sample
$ svn add config/database.yml.sample
A      config/database.yml.sample
```



```
$ svn propset svn:ignore "database.yml" config
property 'svn:ignore' set on 'config'
$ cp config/database.yml.sample config/database.yml
$ svn status --non-recursive config/
A      config
A      config/routes.rb
A      config/database.yml.sample
A      config/boot.rb
A      config/environment.rb
A      config/environments
```

Newer Rails versions might already have some of these files. Use `svn add` with the `--force` option for files you want to replace that might already be under version control. If you use this approach, you'll need to be sure you communicate.

Since you'd make any changes to `database.yml.sample`, other developers might not notice the changes. Most of the time, though, the sample file will not change, and leaving it “as is” is OK. Alternatively, you can call the sample file `database.sample.yml` so your editor can pick up syntax highlighting.

Database Structure Dumps During Testing

When you run the tests, Rails will dump the development database's structure to `db/schema.rb`.³

Managing tmp, documentation, scripts, and public

Rails 1.1 and above now have a `tmp` folder. This folder will hold only temporary files such as socket, session, and cache files. Ignore anything in it:

```
$ svn propset svn:ignore "*" tmp
property 'svn:ignore' set on 'tmp'
```

The `doc` folder holds many subfolders: `appdoc` and `apidoc` among others. To keep things simple, just ignore any “doc” suffix:

```
$ svn propset svn:ignore "*doc" doc
property 'svn:ignore' set on 'doc'
```

Subversion also has a property to identify executable files. Set the property on files you might run from the command line.

3. If the Active Record configuration variable named `config.active_record.schema_format` is set to `sql`, the file will be named `development_structure.sql` instead. Simply replace `schema.rb` with `development_structure.sql` in the commands.



Joe Asks...

What About the Deployed database.yml File?

Using the template file technique means the database.yml file is not under version control on your production server. Here are some solutions to this problem:

- Use a branch to deploy, and keep database.yml under version control in the branch. See Section 2.2, *Using a Stable Branch for Deployment*, on page 28 for how to do that.
- Have Capistrano copy the file forward on every deployment. I discuss this solution in Section 5.5, *Using the Built-in Callbacks*, on page 112, and I discuss Capistrano in Chapter 5, *Capistrano*, on page 92.
- You can leave the database.yml file on the server in the shared directory. You can then create a symlink to that file. It's best to create this symlink in an after_update_code Capistrano task. We'll talk more about Capistrano later, but for now, have a quick look at the following Capistrano task just to whet your curiosity:

```
task :after_update_code, :roles => :app,
  :except => {:no_symlink => true} do
  run <<-CMD
    cd #{release_path} &&
    ln -nfs #{shared_path}/config/database.yml ↔
      #{release_path}/config/database.yml &&
    ln -nfs #{shared_path}/config/mongrel_cluster.yml ↔
      #{release_path}/config/mongrel_cluster.yml
  CMD
end
```



Joe Asks...

What If I'm Using Rails Engines?

Rails Engines copies some files to public on startup. Since you do not want to see those files on svn status, you should ignore them:

```
$ svn propset svn:ignore "engine_files" public
property 'svn:ignore' set on 'public'
```

On *nix, you will have to name each file on the command line:

```
$ svn propset svn:executable "*" ↵
`find script -type f | grep -v '.svn'` public/dispatch.*
property 'svn:executable' set on 'script/performance/benchmarkmarker'
...
property 'svn:executable' set on 'public/dispatch.fcgi'
```

On Windows systems, do this instead:

```
C:\deployit> svn propset svn:executable script\performance\* ↵
script\process\* script\about script\breakpointer ↵
script\console script\destroy script\generate script\plugin ↵
script\runner script\server public/dispatch.*
property 'svn:executable' set on 'script/performance/benchmarkmarker'
...
property 'svn:executable' set on 'public/dispatch.fcgi'
```

Since I will deploy on Unix/Linux machines, it makes sense to have the dispatchers use a proper line ending. To do so, set `svn:eol-style` to native to let Subversion manage the line ending according to local conventions:

```
$ svn propset svn:eol-style native public/dispatch.*
property 'svn:eol-style' set on 'public/dispatch.cgi'
...
```

Last but not least, projects usually have a default home page served by a Rails action. This means building a route and removing `public/index.html`:

```
$ svn revert public/index.html
Reverted 'public/index.html'
```

```
$ rm public/index.html
```

Capistrano and Stable Branch Deployment

We'll be dealing with Capistrano in detail later in the book. But for now, know that Capistrano can indeed deploy from the trunk or any branch. For example, this is what the repository line of `deploy.rb` would look like with a stable branch deployment:

```
set :repository,
    "http://yoursvnsver.com/deployit/branches/stable"
```

Saving Your Work

After all these changes, commit your work to the repository:

```
$ svn commit --message="Initial project checkin"
Adding      README
...
Adding      vendor/plugins
Transmitting file data .....
Committed revision 2.
```

Using a Stable Branch for Deployment

Many simple applications simply run off the trunk. Others will feel more comfortable deploying from a stable branch. Several great books address this topic better than I possibly could, but I do want you to get a feel for what's involved. For detailed information on this topic, you should read *Pragmatic Version Control* [Mas05].

The changes you do on trunk might not be fully tested, or you could be in the middle of a major refactoring when an urgent bug report comes in. You need to have the ability to deploy a fixed version of the application without having to deploy the full set of changes since the last deployment. In Subversion, you can copy a branch of development to another name, and you can set up Capistrano to deploy from your stable branch instead of your development branch. Developers call this technique *stable branch deployment*.

Let's create the stable branch, which will be a copy of trunk:

```
$ svn copy --message "Create the stable branch" ↵
    file:///home/ezra/deployit/trunk          ↵
    file:///home/ezra/deployit/branches/stable
Committed revision 234.
```

When you are ready to merge a set of changes to the stable branch, check the last commit message on the branch to know which revisions you need to merge:

```
$ svn log --revision HEAD:1 --limit 1 ↵
    file:///home/ezra/deployit/branches/stable
-----
r422 | ezra | 2007-05-30 21:30:27 -0500 (30 may 2007) | 1 line

Merged r406:421 from trunk/
-----
```

Using the information in the log message, you can now merge all the changes to the branch:

```
$ svn merge --revision 422:436 ↵
    file:///home/ezra/deployit/trunk .
A    app/models/category.rb
M    app/models/forum.rb
A    db/migrate/009_create_category.rb
...
```

Finally, commit and deploy:

```
$ svn commit --message "Merged r422:436 from trunk/"
A    app/models/category.rb
...
Transmitting file data ....
Committed revision 437.

$ cap deploy_with_migrations
...
```

You now have a good Subversion repository, and you can use it to deploy. You've ignored the files that will break your developers' will or just your application, and you've used common Rails conventions. Still, you should know a few things about developing with Subversion with successful deployment in mind. I'd like to walk you through some tips you can use when you're using Subversion with Rails.

2.3 Subversion Tips

Now that your repository is off and running, I'll cover a few quick tips for using Subversion for your day-to-day coding. I'll teach you how to link to Edge Rails with an external link, how to generate code that's automatically checked in, and how to do a few other tricks as well.

Running Edge Rails

If you are like me, you enjoy keeping up with the latest changes in the Rails trunk or Edge Rails. Get the latest and greatest features right as they are added by using `svn:externals`.

You can get Edge Rails to automatically update when you update your working copy by setting the vendor directory's `svn:externals` property by running this command:

```
$ svn propedit svn:externals vendor
```

When your editor opens to allow you to set the `svn:externals` property, add this line:

```
rails http://dev.rubyonrails.org/svn/rails/trunk/
```

The next time you update,⁴ Subversion will download the entire Rails trunk directory to `vendor/rails` for you.

If you want to negate that option, you can use the following as of Subversion 1.2:⁵

```
$ svn update --ignore-externals
```

Edge Rails has all the greatest features but is sometimes unstable. Make sure you have a fairly wide set of unit, functional, and integration tests to catch any bugs Edge Rails might introduce. Don't forget to report any breakage to the Rails-core mailing list and/or to create a ticket on the Rails Trac (<http://dev.rubyonrails.org/>). When reporting a bug, you should always report which revision of Rails you were using at the time:

```
$ svnversion vendor/rails
4077
```

Checking in Generated Code

During normal Rails development, you will use generators to create many new files. Some generated files should not go into the repository. As a general rule, if Rails generates a file from scratch at run time, you will not want to check it in. If you will edit a generated file, you'll want to check it in.

4. If you set `svn:externals` before the first commit, the update will not fetch the external source code.

5. http://subversion.tigris.org/svn_1.2_releasenotes.html

Whenever you build a scaffold, you'll want to add the generated files to Subversion. You can save time by adding them as they are created. Rails makes this easy when you use the `script/generate` command to create new files. Just add the `--svn` flag. Rails will generate the files and then automatically `svn` add them for you, like this:

```
$ script/generate scaffold --svn Post
    exists  app/controllers/
    exists  app/helpers/
    create  app/views/posts
A      app/views/posts
    exists  test/functional/
    dependency model
    exists  app/models/
    exists  test/unit/
    exists  test/fixtures/
    create  app/models/post.rb
A      app/models/post.rb
...
```

2.4 Stabilizing Your Applications

Rails is a fairly forgiving application framework in development mode, with one user. When you push your application up to a production server, it becomes real production software, whether it's ready or not. This section will walk you through a few things you can do to stabilize your application.

Locking Down Plug-ins and Gems

You probably install third-party gems once on your local machine and forget about them. You don't need to do anything unless you want a later gem that fixes a bug or you need features of a new gem.

Shared hosts are a different story, because they often upgrade gems without your knowledge, which could hose your application at the most embarrassing moment conceivable. To prevent this unfortunate circumstance from happening to you, copy each dependency to vendor. Unpack each gem to vendor like this:

```
$ cd vendor
$ gem unpack money
Unpacked gem: 'money-1.5.9'
$ ls
money-1.5.9  plugins  rails
```

Gems all reside in a `lib` folder. To move your gem to version control, you just need to copy the contents of that `lib` folder to `vendor`, like this:

```
$ cp -R money-1.5.9/lib/* .
$ cp money-1.5.9/MIT-LICENSE LICENSE-money
$ rm -Rf money-1.5.9/
$ ls
LICENSE-money  bank  money  money.rb  plugins  rails  support
```

Make sure you abide by your license agreements, too. For example, to comply with the previous gem's license, you also need to copy the license along with the code. Next, add and check in the new files:

```
$ svn add --force *
A      LICENSE-money
...
A      support/cattr_accessor.rb

$ svn commit --message="Imported Money library 1.5.9"
Adding      LICENSE-money
...
Transmitting file data .....
Committed revision 4.
```

Upgrading an Unpacked Gem

When you are ready to integrate a new version of the gem into your application, you essentially follow the same procedure:

```
$ gem unpack money
Unpacked gem: 'money-1.7.1'
$ cp -Rf money-1.7.1/lib/* .
$ cp -f money-1.7.1/MIT-LICENSE LICENSE-money
$ rm -Rf money-1.7.1
$ svn status
M      money/core_extensions.rb
M      money/money.rb
X      rails
$ svn commit --message="Upgraded Money to 1.7.1"
Sending      money/core_extensions.rb
Sending      money/money.rb
Transmitting file data ..
Committed revision 5.
```

If the library provider deleted or moved files around, you need to do the same thing too. Check the library's release notes to learn about any requirements for backward compatibility. A great tool that automates importing new releases of a library is `svn_load_dirs.pl` (<http://svn.collab.net/repos/svn/trunk/contrib/client-side/>).

Freeze the Rails Gems

Even new versions of Rails can break backward compatibility. Bruce's shared host once upgraded to Rails 1.1 while he was in Spain to give a Ruby talk at a Java conference. The new version immediately broke his blog, which was bad enough. As you can imagine, the broken blog made it nearly impossible to extol the virtues of Rails.

After several decades of intense therapy, he has finally recovered from this incident and is a better person because of it. You can protect yourself against this possibility by freezing a copy of the Rails libraries to your app's vendor directory. Your application will use the exact version of Rails that you:

- *considered when you designed your application.* Some versions of Rails have philosophical differences between other versions, such as the new forms model introduced in 1.2, not to mention significant changes in Rails 2.0.
- *used to test your application.* If you don't freeze your Rails gems, you're fundamentally saying that you don't need to test how thousands of lines of code will work with your application. If you make such a choice, I wouldn't recommend any long trips to London.
- *understand.* Rails is an active framework. You need to make sure you have a good grasp on changes in the framework before you deploy.

When you upgrade to a newer version of Rails, you can integrate your application, test, and then refreeze it to the vendor directory:

```
local$ rake rails:freeze:gems
```

If you've come from a C, Java, or C# platform, you may be surprised the Ruby gems often break backward compatibility. In truth, this decision is a double-edged sword. If you don't respect backward compatibility, your applications can break, but there's a benefit. Breaking backward compatibility allows your framework to evolve much more quickly and cleanly, without the risk of framework bloat. (See Enterprise JavaBeans or XML for two examples.) Ruby and especially Rails developers value a cleaner code base more than backward compatibility. As more enterprise developers use Rails, you may see a change, but don't ever rely on a future that lets your application run safely without your own version of Rails. With versioned code and gems in hand, you can move on to organizing your migrations.

2.5 Active Record Migrations

Migrations, a Rails feature that lets you express your database tables in Ruby instead of SQL, are a great way to manage your database schema throughout your development process. You can quickly create, change, or delete tables and indexes. If you are already using migrations, I'll show you how to whip them into shape for your production environment. If you're deciding whether to use them, you should know the strengths and weaknesses of the approach.

Migration Strengths and Weaknesses

On the plus side, migrations generally provide a more comfortable environment and ease the process of keeping your production schema up-to-date. More specifically:

- *Migrations let you express database-independent code in Ruby instead of SQL.* Because you're working in Ruby, you can often express your ideas in a cleaner, simpler way.
- *Migrations integrate with Rake (and Capistrano to a lesser extent).* You can call Rake commands to move your migrations up to a precise level or move your schema back to a point in time. You can also ask Capistrano to run your migrations automatically when you deploy.
- *Migrations deal with data.* Some database schema changes require changes in data. Migrations can handle both, since they are Ruby scripts. Setting the data for new columns, selectively adding or deleting rows, or defining lookup tables are all examples of dealing with data in migrations.
- *Migrations simplify backing up.* Rails developers make just as many mistakes as any others. If your latest build is a stinker that also changes the schema, migrations can allow you to back up quickly.
- *Migrations make it easy to change schemas without losing data.* Since migrations use the ALTER TABLE command rather than CREATE and DROP table, you can easily make changes to the schema without worrying about losing production data. Also, you can use the same tools to manage your development and production schemes.

Keep in mind that migrations are not a silver bullet. Some teams can make them work, and others can't. In general, small teams with a simple deployment strategy will work great with migrations.

Large teams, teams that manage multiple releases, or teams that refactor model code on a regular basis and simultaneously use data migrations will struggle. These are some of the disadvantages of migrations:

- *Migrations do not integrate with Subversion.* If an older migration depends on a particular model and that model no longer exists, it will break. The source code history in Subversion has no effective link to the database schema history that lives in your latest Subversion version.
- *Migrations have some curious defaults.* By default, columns allow null. My experience shows that most developers don't think about null columns until it's too late, leading to database integrity problems later.
- *All developers depend on a unified numbering scheme but have no tools to manage them.* If you create a migration and your friend creates one at the same time, they will both have the same number, and they will fail.
- *Branches are tough to manage.* If you want to add a major branch, perhaps to develop a major new feature without deploying it to the public until it is stable, you will effectively have to write your own migration support to do so, because each part of the application will need its own migrations.
- *Components have a tough time depending on migrations.* Try to integrate an existing blog to an existing application, and you'll see what I mean. Migrations don't provide a good default to deal with this problem.

For the most part, I like migrations. They are quick and convenient most of the time, and if you can make them work with your team's model, you'll usually be glad you did. If you've already committed to migrations, make sure you look at the disadvantages and understand them. You will want to solve the problems you're likely to face before a migration blows up in production.

First Look at Migrations

Regardless of whether you have a schema defined already or you are starting a new project, you can easily start using migrations. If you already have a schema in place, you'll find Rails has some good tools that will help you convert them.

Assume you have a `forums` table defined in a MySQL database and that the SQL looks like this:

```
CREATE TABLE `forums` (
  `id` int(11) NOT NULL auto_increment,
  `parent_id` int(11) NOT NULL default '0',
  `title` varchar(200) NOT NULL default '',
  `body` text NOT NULL,
  `created_at` datetime default NULL,
  `updated_at` datetime default NULL,
  `forums_count` int(11) NOT NULL default '0',
  PRIMARY KEY (`id`)
) TYPE=InnoDB;
```

To start using a pure-Ruby schema, Rails includes a handy Rake task to kick start your migration (pun intended). Run this command from your application's root:

```
$ rake db:schema:dump
```

This command will create a `schema.rb` file that looks like this:

[Download](#) before-category-migration/db/schema.rb

```
# This file is autogenerated. Instead of editing this file, please use the
# migrations feature of ActiveRecord to incrementally modify your database, and
# then regenerate this schema definition.
```

```
ActiveRecord::Schema.define() do
```

```
  create_table "forums", :force => true do |t|
    t.column "parent_id", :integer, :default => 0, :null => false
    t.column "title", :string, :limit => 200, :default => "", :null => false
    t.column "body", :text, :default => "", :null => false
    t.column "created_at", :datetime
    t.column "updated_at", :datetime
    t.column "forums_count", :integer, :default => 0, :null => false
  end
```

```
end
```

With `db/schema.rb` in place, you can start writing migrations. Rails will apply each change to your initial `schema.rb` file. You will never need to edit this file directly because Rails generates a fresh one after each migration of your schema. Initially, you will need to copy the initial file to your test and production environments.

`db/schema.rb` serves as the starting place for each migration. The file holds your entire database schema at any point in time in one place for easy reference. Also, migrations create a table called `schema_info`. That

table holds a single version column, with one row and a single number: the version number of the last migration that you ran. Each migration is a Ruby file beginning with a number. The migration has an `up()` method and a `down()` method. Migrating up starts with `schema.rb` and applies the migrations with higher numbers than the number in `schema_info`, in order. Migrating down will apply the migrations with lower numbers, greatest first.

So now that you have a `schema.rb` file, you have everything you need to create migrations at will. Your first migration will create `schema_info` for you. I don't want to teach you how to build a Rails application here, because the Rails documentation is fairly complete. I do want to make sure you know enough to stay out of trouble.

Putting Classes into Migrations

Good Rails developers generally don't depend on domain model objects in migrations. Five weeks from now, that `Forum` model might not even exist anymore. Still, some data migrations will depend on a model, so you need to create model instances directly inside your migration:

[Download](#) `after-category-model/db/migrate/005_cleanup_forum_messages.rb`

```
class CleanupForumMessages < ActiveRecord::Migration
  class Forum < ActiveRecord::Base
    has_many :messages, :class_name => 'CleanupForumMessages::Message'
  end

  class Message < ActiveRecord::Base
    def cleanup!
      # cleanup the message
      self.save!
    end
  end

  def self.up
    Forum.find(:all).each do |forum|
      forum.messages.each do |message|
        message.cleanup!
      end
    end
  end

  def self.down
  end
end
```

Notice that I declare each class I need in the migration itself, which acts like a module.

Make sure that you use the `:class_name` feature of `has_many()`, `has_one()`, `belongs_to()`, and `has_and_belongs_to_many()` because Rails uses the top-level namespace by default, instead of the current scope, to find the associated class. If you do not use `:class_name`, Rails will raise an `AssociationTypeMismatch` when you try to use the association.

The solution is not perfect. You're introducing replication, and some features such as single-table inheritance become troublesome, because you need to declare each and every subclass in the migration. And good developers can hear the word DRY—"don't repeat yourself"—in their sleep. Still, your goal is not to keep the two versions of your model classes synchronized. You are merely capturing a snapshot of the important features of the class, as they exist today. You don't necessarily have to copy the whole class. You need to copy only the features you intend to use.⁶

More Migrations Tips

You should keep a few other things in mind as you deal with migrations. These tips should improve your experience with them:

- *Keep migrations short.* You shouldn't group together many different operations, because if half of your migration succeeds, it will be too hard to unwind. Alternatively, you can include your migrations in a transaction if your database engine supports DDL statements like `CREATE` and `ALTER TABLE` in a transaction. PostgreSQL does; MySQL doesn't.
- *Make sure you correctly identify nullable columns.* Columns are nullable by default. That's probably not the behavior you want for all columns. Rails migrations probably have the wrong default.

This list of tips is by no means an exhaustive list, but it should give you a good start. Now, it's time to shift to looking at improving the rest of your application.

2.6 Application Issues for Deployment

Rails is a convenient framework for developers. Sometimes, the convenience can work in your favor. You can build quickly, and Ruby is

6. Thanks to Tim Lucas for the original blog post: http://toolmantim.com/article/2006/2/23/migrating_with_models.

malleable enough to let you work around the framework. But if you're not careful, all of that flexibility can bite you. In this section, I'll walk you through some common security problems and a few performance problems as well.

Security Problems

Rails has the security characteristics of other web-based frameworks based on dynamic languages. Some elements will work in Rails favor. You can't secure something that you don't understand. The framework is pretty simple, and web development experts already understand the core infrastructure pretty well. But Rails has some characteristics you'll have to watch closely.

Rails is a dynamic, interpreted language. You need to be sure you don't evaluate input as code and that you use the tools Rails provides that can protect you.

Using View Helpers

You likely know how Rails views work. Like most web frameworks, Rails integrates a scripting language into HTML. You can drop code into Rails by using `<%= your_code_here %>`. Rails will faithfully render any string that you may provide, including a name, helpful HTML formatting tags, or malicious HTML code like this:

```
<img src='http://porn.com/some_porn_image.jpg' />
```

You can easily prevent this problem by using the template helpers. If you surround your code with `<%=h your_code_here %>`, Rails will escape any HTML code a malicious user may provide.

Don't Evaluate Input

At the same time, you need to be sure not to evaluate any code that any user might type as input. Ruby is a great scripting language, but you should be careful anytime you try to evaluate any code, and you should *never evaluate user input*. For example, consider the following code that assumes you're picking the name of an attribute from a selection box:

```
def update
  ...
  # Don't do this! Potential injection attack
  string = "The value of the attribute is " +
    "#{Person.send(param[:attribute])}"
  ...
end
```

That code would work just fine as long as the user cooperated with you and picked “first_name” or “email” from a selection box. But if a Rails developer wanted to exploit your system, he could send data to your controller by opening a curl session and posting his own data. Or, if you don’t verify that the command is a post, he could simply key the following into a URL:

```
your_url.com/update/4?attribute=destroy_all
```

Assume all user input is tainted. Not all metaprogramming is good. Don’t ever evaluate any data that comes from a user unless you’ve scrubbed it first.

Don’t Evaluate SQL

You can make a similar mistake with SQL. Say you want to look up a user with a user ID and a password. You could issue the following Active Record command:

```
# Don't do this!
condition = "users.password = #{params[:password]} and
            users.login = #{params[:login]}"
@user = find(:conditions => condition)
```

And all is well. At least, all is well until someone types the following instead of a password:

```
up yours'; drop database deployit_production;
```

The first semicolon ends the first SQL statement. Then, the cracker launches some mischief of his own, dropping the production database. An alternative would be to try to create a user with enhanced permissions. This type of attack, called *SQL injection*, is growing in prominence. You can easily prevent the attack by coding your condition like this:

```
conditions = ["users.login = ? and users.password = ?",
             params[:login], params[:password]]
@user = find(:conditions => conditions)
```

This form of a finder with conditions allows Rails to do the right thing: properly escape all parameters and input that Active Record will pass through to the database.

Check Permissions

Rails gives developers plenty of help when it comes to building pretty URLs. The bad news is that others who would attack Rails also know this. Consider the following action, which is commonly created through scaffolding:

```
def destroy
  Person.find(params[:id]).destroy
  redirect_to :action => 'list'
end
```

To secure the command, you decide to add `before_filter :login_required` to the top of your controller, meaning people need to log in before accessing the `destroy()` method. For an application where only admins can delete, that protection is enough. But if any user can create an account and log in, that protection is not nearly enough. Any user can create an account and start deleting records by sequentially typing ID numbers into the browser:

```
/people/destroy/1
/people/destroy/2
/people/destroy/3
/people/destroy/4
/people/destroy/5
/people/destroy/6
/people/destroy/7
...
```

Worse yet, a bot could log in and delete all your records. You need to check that the logged-in user has permission to delete the file within the controller action. Assume that each `Person` object is associated with the `User` who created it. Also, assume `current_user` returns the current logged-in user. Then, you could protect `destroy()` like this:

```
def destroy
  person = Person.find(params[:id])
  person.destroy if current_user == person.user
  redirect_to :action => 'list'
end
```

Logging in is not enough. You must scope individual destructive actions to one user. That covers the most common security flaws. There are others, such as exposing your `.svn` directories to the Web. The easiest way to get around this one is to do an `svn export` instead of an `svn checkout` when deploying your code to production. This will export your code without the Subversion metadata and keep prying eyes away.

If you take heed of these various issues, then your Rails application should be nice and secure. Do make sure you keep up with the main Rails blog; see <http://weblog.rubyonrails.org/> for any security updates or warnings.

Database Performance Problems

Active Record belongs to a family of database frameworks called *wrapping* frameworks. A wrapping framework starts with a single table and places a wrapper around it to allow object-oriented applications to conveniently access rows in the table. The performance of wrapping systems like Active Record is highly dependent on you, the programmer. The biggest thing you can do is benchmark your application. We'll discuss benchmarking in Chapter 9, *Performance*, on page 224. In the meantime, I'll show you the most common problem you're likely to see.

The N + 1 Problem

Active Record makes it easy to retrieve a given object and access its attributes. Bad things happen when those attributes are lists of other Active Record objects. Let's say you're building the next great social networking site. You have a `Person` that has_many :friends. To populate a list of friends, you write some harmless code that looks like this:

```
friends = Person.find(:all, :conditions => some_friend_conditions)
@friend_addresses = person.friends.collect {|friend| friend.address.street }
```

To be sure, that code will work, but it's also horribly inefficient and will get worse as the list of friends grows. You're actually running an Active Record query for the list of friends and another for every address you need to fetch. You can fix that problem by using *eager associations*, meaning you'll tell Active Record what to load in advance with the `:include` option:

```
friends = Person.find(:all, :conditions => some_friend_conditions,
                     :include => :address)
@friend_addresses = person.friends.collect {|friend| friend.address.street }
```

This code works in the same way to you, but the performance will improve dramatically. Active Record will load all people and their addresses instead of just loading people in the first query and addresses as you touch them the first time.

Indexes

Rails lets database developers get pretty far without knowing anything about the database underneath or even the theory surrounding relational databases. If you trust Active Record to take care of you, it's likely that you and your users will be disappointed. One of the easiest things to forget when you're coding Rails is to create indexes. For any large tables, make sure you create an index on any column you need to search. And periodically, you should run statistics so the database optimizer knows when to use indexes. Database administration performance techniques are beyond the scope of this book.

Chapter 3

Shared Hosts

Finding a host for your first Rails app is a lot like finding your first home. When I left home the first time, I wanted to move right into a castle, but real life doesn't work out that way. Most people first move into an apartment or dorm room. True, apartments don't come with their own throne room and servants' quarters, but they do have their advantages. You're sharing common resources and infrastructure with many others, so you wind up paying less. You don't have to mow the lawn or paint the fence. For most people, the first Rails app runs in modest quarters for many of the same reasons: shared infrastructure, lower costs, and help with the maintenance. In this chapter, you'll learn how to pick and prepare a shared host.

3.1 The Lay of the Land

Many Rails apps start life on a shared server, as shown in Figure 3.1, on the next page. You'll buy one slice of a larger server that will have the ability to serve your Rails application and static content. You will control only a few directories for your application. You'll use Subversion to install your application while you set up your initial infrastructure, until you're ready to automate with Capistrano. For a few dollars a month, you'll have your own domain name, access to a database server, several email accounts, and maybe even a Subversion repository. For many people, this setup is enough for a blog, a site prototype, or even a bug-tracking system.

If you can cache your application, and sometimes even if you can't, you can serve hundreds of users daily without needing to pay US\$100 per month for a dedicated server. Your hosting company will fix intermittent problems, occasionally upgrade your machine, and keep things running

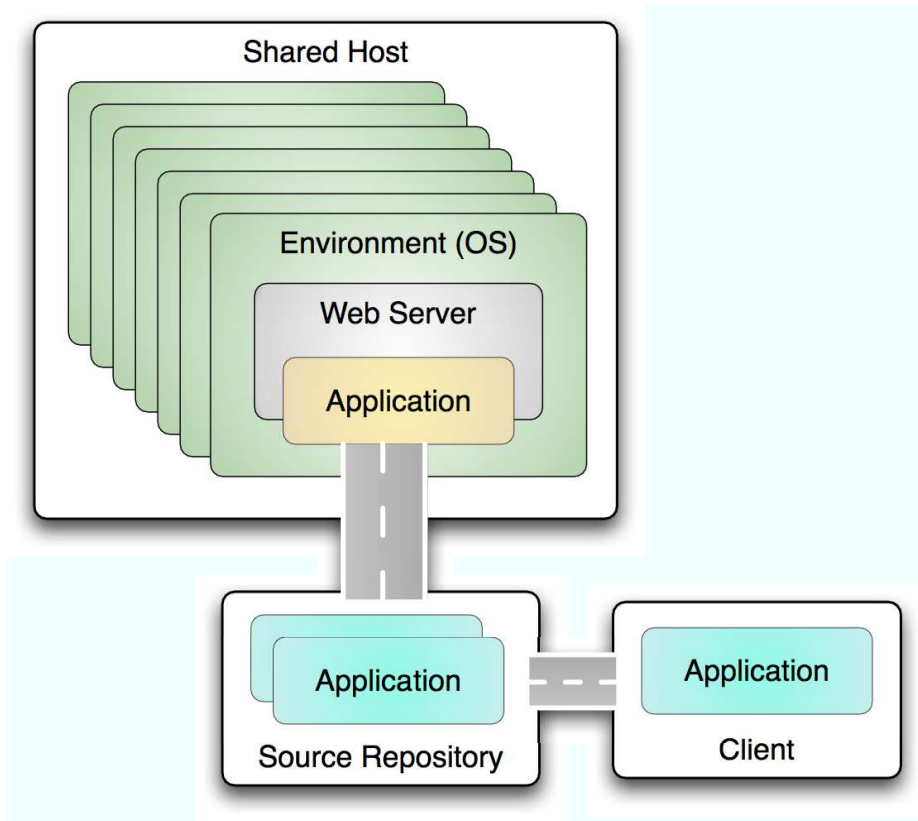


Figure 3.1: Map for a shared server

smoothly. When you are ready to move on to a more powerful dedicated machine or a cluster of servers, you can upgrade within your hosting company or transfer to a colocation facility.

At least, that's the theory. Shared hosting is not all sunshine and roses. You may be sharing a single server with more than 1,000 other web-sites. I've received more than my share of "nasty grams" telling me that my app's memory was out of control or that my unstable app crashed the whole server. I've been on the other end of the equation, too. I've been the good citizen, but someone else ran a script that monopolized the server's resources and slowed my application to a belly crawl. I've also had my site become wildly popular and subsequently gotten a bill for US\$500. (I am much happier now that I am on the sending end of

those bills!) A good host will keep tabs on these statistics and will notify you if you are using more than your share. Most will even give you a little grace period and eat small overages for short periods of time.

All things considered, you *can* do almost anything on a shared server that you can do on a dedicated server, but you'll have more resource constraints. If you are just learning how to develop a database-driven website, you can focus on the mechanics of your application instead of worrying about the details of configuring DNS, daemons, and disk partitions. Even so, I recommend you treat a shared host as a starting point, not as the final destination for your application. If you are earning more than US\$30 per month from your site or if your business depends upon it, you should upgrade to a virtual private server or a dedicated server.

When you look for a new home, you can't do it all at once. You'll have to consider the time it takes to pick a place, change your address, bribe the landlord, and decide whether you'll keep or throw out all that fine stuff like your old Commodore 64. Moving takes time, and things go more smoothly when you plan. Treat setting up a shared host the same way. You have one goal—making your application run on a shared host—but it's best to define a few discrete steps to get there:

1. Find the right place. Pick the plan that works best for your application and your pocketbook.
2. Tell the world where you live. On the Web, that means updating your DNS entries.
3. Move in your stuff. For Rails, that means installing your application. Later, I'll help you automate this step.
4. Set up your utilities. In the web world, that means configuring your web server and database server to work with your Rails app.

When all is said and done, your setup might not work the first time. That's OK. I'll walk you through the process of pulling it all together. When you're done, you'll have a slice of a common server, a Mongrel web server, and a database-backed Rails application.

3.2 Choosing a Shared Host

Way back at the dawn of Rails history (aka the fall of 2004), only a few hosts officially supported Ruby on Rails. That number increases every day as Rails becomes better known. There are many capable hosts, so

I won't recommend any single provider, but you should look for several critical features in a shared host.

Basic Requirements

At minimum, the host you choose must have the following features:

- *Ruby 1.8.6 and Rails 1.2.6 or Rails 2.0.*
- *Mongrel support.* Some shared hosts don't yet support Mongrel, but there are plenty that do, and Mongrel is rapidly emerging as the de facto standard within the Rails community.
- *The ability to specify the web server's document root directory.* There are ways to get around this, but it is much easier if the host provides an interface where you can point the web server to your preferred directory, perhaps one like `/home/ezra/brainspl.at/current/public`.
- *SSH access.* This is crucial for troubleshooting your installation and is required for deploying with Capistrano. Some very inexpensive hosts allow you to transfer files only by FTP, so choose one that has SSH as an option.
- *A database server and the required Ruby gems to connect to it.* MySQL and PostgreSQL are popular, but you can use file-based database managers such as SQLite just as easily.

For the optimal Rails setup, I recommend these features:

- *OS-dependent gems, such as RMagick.* These gems let you easily generate graphics, make thumbnails of photographs, and do other useful tasks. You can copy pure-Ruby gems into your Rails application's `lib` directory, but you really want your hosting provider to install gems requiring compilation and C libraries because building and installing these gems takes more authorization than your account will typically have.
- *Subversion repositories that are accessible over HTTP (or secure HTTPS).* Whether you are a professional programmer or a hobbyist, you should be using source code control. With a source code control system, you can deploy with Capistrano or publish Rails plug-ins that other Rails developers can install with the built-in `./script/plugin` mechanism. You can use Subversion in countless other ways, but HTTP access is the most versatile in the context of a Rails application.

The Core Rails Libraries

If you were paying attention, you saw that an installation of the core Rails libraries was missing from both lists! In fact, you will experience more stability if you use the built-in `Rake rails:freeze:gems` command to save a specific version of Rails to your application's vendor directory. You can find more about this in Section 2.4, *Freeze the Rails Gems*, on page 33. If your host decides to upgrade to a blazingly fast new version of Rails in the middle of the night—one that might break your application—your application will still run with the older version residing in your vendor directory. When you have tested your app against the newer version of Rails, you can again call `rake rails:freeze:gems` to upgrade.

The adventurous can use `rake rails:freeze:edge` to use a copy of the development version of Rails (commonly called the *trunk* version or *Edge Rails*). Even though Rails is almost three years old, development continues at a rapid pace. Edge Rails users get to use newer Rails features before the general public. Early use is a double-edged sword. With the benefits you get with the early use of new features comes the potential for API change and bugs. Both problems are inherent in using early software.

You can also tie your application to the newest Rails trunk so it is updated every time the development branch of Rails is updated, but I don't recommend doing so because that strategy adds another unknown element into your deployment process. The Rails core team is very active, and updates to the Rails trunk are made several times a day. Your application might work at 8:05, but an update made at 8:06 could break your app when it is deployed on the server at 8:07. Keeping a consistent version of Rails will let you decide when to upgrade, on your schedule.

If you have installed other third-party libraries or plug-ins, they may use undocumented features of Rails that could change without notice. Well-behaved plug-ins will be more stable, but no authorized group of developers certifies plug-ins. By using a consistent release (or edge) version of Rails in conjunction with a thorough test suite, you can guarantee that the combination of code libraries in your application passes all your tests.

Whether you choose to live on the edge or use an older version of Rails, freezing the libraries within your application will help you simplify your deployment and maintenance in the long run. Next, I'll walk

you through some of the intangible factors you should consider when selecting a shared host.

Intangible Factors

Shared hosts have variable reputations. You'll want a shared host with a good reputation for support and one that runs a tight ship. You may not like that nasty email from the overzealous, pimple-ridden admin that threatens the life of your firstborn because your application is taking more than its share of resources, but he's exactly who you want running your server. He will keep all the *other* apps on that shared host in line too. You'll also want a company with enough experience to give you a little grace if your traffic spikes once in a while and won't simply kill your Mongrels without any notification when things step out of the common parameters. System maintenance such as regular backups and cycling log files is a plus because you won't have to do them yourself.

The best way to measure intangibles is to ask around. Good Rails programmers will know who the good vendors are. I won't list any here because I am such a vendor, but be forewarned. The best shop today—one with good deals and good admins—could experience unmanageable growth, could lose that key admin who made everything run like a Swiss watch, or could just get lazy. Ask around and keep up. You'll be glad you did. You can start with the excellent Ruby on Rails wiki¹ or by chatting with Rails developers on IRC.²

After you've done your homework and picked your host, you'll want to start setting things up. But first things first. You'll need to tell the world where your application lives. That means you'll need a domain name, and you'll need to configure DNS.

3.3 Setting Up Your Domain and DNS

Any home you choose will need an address so people can find you. On the Internet, you'll have two addresses: the one with numbers and dots is your IP address, and the name with a .com or .org on the end is your domain name. The IP address contains four numbers, each with values from 0 to 255, separated by periods. Since memorizing up to twelve

1. <http://wiki.rubyonrails.org/>

2. <http://wiki.rubyonrails.org/rails/pages/IRC>

digits is hard, most of your users will refer to your site by its domain name instead. You will buy your domain name from a domain name service such as GoDaddy, Network Solutions, or Enom, and you'll get your IP address from your hosting service. Under the covers, Domain Name System (DNS) will associate your name with your IP. The Internet has several public domain name registries that associate IP addresses with domain names. So to establish your address, you need to do the following:

1. Buy a domain name. They will give you a name and a way to configure the IP address.
2. Pick a shared host. They will give you your IP address.
3. Associate your name with your IP address.

You can easily buy a domain name for as little as US\$10, which means the hardest part is picking a name to use! I recommend choosing something that is easy to remember and easy to spell. (I hope your name is simpler than *EzraZygmuntowicz.com*!) You can use a site such as Instant Domain Search³ to help find a name that's not already in use.

Most domain name registrars will also give you a web page to configure your DNS settings. If you cannot easily find any place to make DNS changes, contact your providers support system to ask about DNS settings. You want these to point to your shared hosting company's servers so the domain name server will forward requests for your domain name to your specific server.

DNS stands for Domain Name System. It is responsible for resolving a domain name and returning an IP address where the service really lives. Your shared hosting provider will have its own name servers. When you sign up, ask the provider to give you its DNS name server addresses. They will be something like *ns1.foobar.com* and *ns2.foobar.com*. Take note of these addresses, go to your domain name registrar where you registered *foobar.com*, and click the section for DNS or name servers for your domain. They will have multiple form fields you can fill out. Most hosts will give you two name servers, but they may have more. Once you enter these details and save the results, it will take twelve to seventy-two hours for the name servers all across the world to propagate your new records. Once DNS is propagated, you can type *foobar.com* in your browser, and the domain name service will find the server's IP address and route your request to your domain.

3. <http://instantdomainsearch.com>

Using Hosting Company Subdomains

Some shared hosts also provide you with a subdomain to use while you are setting up your site. This might be something like <http://ezmobius.myhost.com>. I strongly recommend against this approach because it looks less professional and requires that you use a third-party service for your email.

Also, if you switch to a different host, you will have to inform all your visitors that your address has changed. When using your own domain name, you can switch from one host to another with fewer consequences, and your customers never need to know.

You may be able to see your new application before the bulk of your customers, depending on where you live and the DNS services near you. Propagation time can range from less than an hour to a couple of days, so plan in advance. While you're waiting for the DNS changes to take hold, you can switch gears and focus on configuring the shared host.

3.4 Configuring Your Server

Configuring your server is surprisingly easy when you follow a simple plan. It really amounts to providing access to your server through SSH and your document root and creating your application's database. If you do these steps correctly, you'll have a good foundation for the easy deployment of your web server and Rails app.

First, you'll want to determine your application's root directory. If you don't know exactly where to put your application, ask. Most host accounts will create this directory for you and set permissions appropriately. In the rest of this chapter, I'll refer to that directory as the *application root*. This is the top-level directory for your Rails project. Your document root is the root directory for your web server and will hold your static files. Usually, you'll put your Rails project in a directory called *current*, meaning your document root will be *current/public*. From here on out, I'll refer to that directory as the *relative root* (*/current*).

Server Setup: Document Root and SSH

To prepare your shared host for your application, you're going to need a way to talk to it securely (SSH). You will also need a new user account on the shared server. Many shared hosts provide only one SSH user per account, and your hosting company may have created one for you already. If not, each hosting company has a different web interface, but the process is usually simple. Just read the documentation the host provided.

After you've created an account, try it. If you're running Windows, you'll need to set up your SSH client. PuTTY is a good one. There are several free clients, and you'll find plenty of documentation for them. If you're running a Unix derivative, you'll have a much easier time. Usually, you won't even need to install anything. Open a terminal, and type `ssh username@hostname`, using the information from your hosting provider. If you have any trouble, ask your hosting provider. Make sure you get your SSH connection working, because it's your secure window into the system for all your deployment, maintenance, and debugging.

While you are logged in, you will want to change the site's document root, also called the *web root*, to `/current/public`. Check the control panel for your site for the right place to configure your document root. The tool to change it will vary based on your provider. Shortly, you'll upload your Rails application to the current directory. The public directory has your application's public directory, which hosts static resources for your application. Capistrano, the Rails utility for deployment, will use the current directory to always hold the most recent version of your site.

3.5 Server Setup: Create a Database

The final task to do on the server is to create a database. Again, the means for doing this depends on your hosting provider. As you know, when you created your Rails application, you gave it a name, for example, `rails ezra`. By default, Rails will use three databases for each of the test, development, and production environments. The default database name for each environment is the name of the Rails project, followed by an underscore, followed by the name of the environment. For example, for an application called `ezra`, Rails would generate `ezra_development` for the development database. In practice, many developers omit the `_production` for their production database.

Normally, your hosting provider will require that you share your database with other users. They will likely give you a user ID and password to access your own database namespace. You'll use that ID to create your database. Whichever name you choose, make sure to keep the database name, combined with an admin-level username and password, in a safe place for use later. Here's an example on MySQL that creates a database called ezra and grants all the appropriate privileges. Your setup may vary.

```
mysql> GRANT SELECT,INSERT,UPDATE,DELETE,CREATE,DROP, ALTER, INDEX
mysql> ON ezra.* TO 'ezra'@'hostname' IDENTIFIED BY 'password';
mysql> FLUSH PRIVILEGES;
mysql> CREATE DATABASE ezra;
```

If you want to peek ahead, the production section of your Rails application's config/database.yml file will look like this:

```
production:
  adapter: mysql
  database: ezra
  username: ezra
  password: password
  host: brainspl.at # provided by your shared host provider
```

At this point, you'll want to make sure your database is running and you can access it. Just using the database and showing the list of tables is enough for now:

```
mysql> use ezra;
Database changed
mysql> show tables;
Empty set (0.00 sec)

mysql>
```

Now, you should have a working domain that's pointed to your hosting provider, you should be able to reach your server through SSH, and you have created and accessed a database on the server. With all that background work out of the way, it's time to configure your web server.

3.6 Installing Your Application

Even before I knew how to write a single line of PHP, I could copy a basic PHP script to a server and run it. Deploying Rails is not that easy. You need to have at least a basic idea of what files and folders are used by Rails when it runs.

Fortunately, Ruby has excellent tools that let you deploy your application easier than PHP. The main one is Capistrano, which you'll see in Chapter 5, *Capistrano*, on page 92. When we're done, your Capistrano script will check your application directly out of your Subversion repository and put it exactly where it needs to be. But you need to walk before you can run.

I'm going to take you through the installation process manually. That way, you'll see where everything goes, and you'll have a greater appreciation of what Capistrano is doing for you. Don't worry, though. I'll walk you through automating the works soon enough.

Your first job is to put your Rails application on your shared host. You should name your root project directory `current`. (As we mentioned earlier, that's the name that Capistrano will use when you automate your deployment.) Since you have SVN installed, you can use `svn export` to copy your application to your server, like this:

```
$ svn export your_repository_url ~/webroot/current/
```

You've already done some work to prepare your application for deployment. Even so, you'll often want to build a tiny working application to figure out your deployment story before your full application enters the picture.

If you decide to take this approach, you can build a tiny Rails app in a couple of minutes. You'll create a Rails project, generate a model, create your migration, and configure your database. I'll walk you through that process quickly so you'll have a starter application. If you already have a starter application, skip the next section.

Creating a Starter Application

When you are testing a deployment configuration, you'll often want an application simple enough for your grandmother to build. You'll want this simple application to do enough with Rails so you can see whether your production setup works. You don't want to have to debug your deployment environment and your application at the same time.

With Rails, you can take five or ten minutes and build a dead-simple starter application. Once you have that working, you can move on to your real application.

You'll want to do all the following steps on your development machine, not your shared host. Your goal is to build a Rails application that exercises Rails models, views, and controllers. Since the default Rails project already tests the controller and views by default, you need to worry only about a primitive model.

Run the commands `rails ezra`, `cd ezra`, and `ruby script/generate model person`. (You don't need the `ruby` on some platforms). You'll get results similar to the following:

```
~ local$ rails ezra
  create
  create  app/controllers
  create  app/helpers
  ... more stuff ...

~ local$ cd ezra/

~/ezra local$ script/generate model person
  exists  app/models/
  exists  test/unit/
  exists  test/fixtures/
  create  app/models/person.rb
  ... more stuff ...
```

These steps give you a project and a model, but one without database backing. The last command also generated a migration that you can use to create your database-backed model. Edit the file `db/migrate/001_create_people.rb`. Add a column called `name`, like this:

```
class CreatePeople < ActiveRecord::Migration
  def self.up
    create_table :people do |t|
      t.string "name"
    end
  end

  def self.down
    drop_table :people
  end
end
```

Create a MySQL database called `ezra_development`, which you can access with a user called `root` and no password. (If your database engine, user, or password are different, you'll simply have to edit `database.yml` to match.) Run the migration with `rake db:migrate`, and create a scaffold with `script/generate scaffold person people`.

You have everything you need to test your Rails setup:

```
~/ezra local$ mysql -u root
Welcome to the MySQL monitor.  Commands end with ; or \g.
Your MySQL connection id is 33 to server version: 5.0.24-standard

mysql> create database ezra_development;
Query OK, 1 row affected (0.02 sec)

mysql> exit
Bye
~/ezra ezra$ rake db:migrate
(in /Users/batate/rails/ezra)

== CreatePeople: migrating =====
-- create_table(:people)
   -> 0.1843s
== CreatePeople: migrated (0.1844s) =====

~ezra ezra$ script/generate scaffold person people
exists app/controllers/
exists app/helpers/
create app/views/people
exists app/views/layouts/
... more stuff ...
```

If you've done any Rails development at all, you know these commands create your database, create your initial table for your Person model in a Rails migration, and create a simple scaffolding-based application that you can use to test your simple production setup. Next, you'll move on to the web server configuration. Later, I'll use this starter application to make sure things are working.

3.7 Configuring Your Web Server

On most shared hosts, Rails can run with either the Apache or the lighttpd web server with FastCGI, but I recommend Mongrel behind Apache, nginx, or lighttpd instead if your host supports it. We will cover how to use a proxy in front of a Mongrel cluster later in the book. For this chapter, we will cover configuring Mongrel as well as Apache or lighttpd with FastCGI. As you will see, the Mongrel configuration is trivial, and that's exactly the point of using it. If you're on a hosting provider that forces you to use FastCGI, you can still grin and bear it. I'll help you get set up regardless of web server.

Configuring Mongrel

Your shared host likely has Mongrel already installed. You'll be amazed at how simple configuration, startup, and shutdown can be. Mongrel is a web server written by Zed Shaw in 2,500 lines of Ruby and C. Mongrel is custom-tailored to running Ruby web applications like Rails. Since Mongrel is an HTTP server in its own right, you gain the ability to use it with a wide variety of preexisting tools built to work with HTTP. Here is what Zed has to say about it on the project's home page:⁴ "Mongrel is a fast HTTP library and server for Ruby that is intended for hosting Ruby web applications of any kind using plain HTTP rather than FastCGI or SCGI."

Mongrel is truly one of the best weapons in your arsenal when it comes time to deploy your application. It also makes for a great development server environment. Mongrel uses the best of both the Ruby and C worlds. Internal HTTP parsing is done in C, and the API for configuration and application interface is done with Ruby. This C foundation gives it very good speed, and the clean Ruby wrapper provides a familiar Ruby interface for configuration and extension.

Mongrel offers huge deployment advantages because it breaks away from opaque protocols like FastCGI or SCGI and uses plain HTTP for its transfer mechanism. HTTP is a proven, well-tooled, transparent protocol that all sysadmins know well. Because of the affinity to HTTP, you will have a lot of options for integrating Mongrel into your production environment. With Mongrel, you can interrogate individual Rails processes with simple command-line tools like `curl` or by using a browser and adding the individual Mongrel port number to the URL. By contrast, Apache and `lighttpd` use FastCGI, so there is no way to communicate with your Rails process without going through your front-end web server.

If your hosting provider has already installed Mongrel for you, you can take your new dog for a walk. Fire up one of your Rails applications on Mongrel. Navigate to your project directory, and type the following:

```
ezra$ cd ~/webroot/current/
ezra$ mongrel_rails start -d
```

That command will start a Mongrel daemon running in the background on port 3000. That port is fine for your development machine, but your

4. <http://mongrel.rubyforge.org>

shared host can't have everyone on port 3000. Find out which port you should use. You'll have to start Mongrel on your preassigned port with the `-p` extension:

```
ezra$ mongrel_rails start -d -p 7011
```

It is just as simple to restart or stop the Mongrel server:

```
ezra$ cd ~/webroot/current
ezra$ mongrel_rails restart
Sending USR2 to Mongrel at PID 27033...Done.
ezra$ mongrel_rails stop
Sending TERM to Mongrel at PID 27037...Done.
```

And that's it. You can use the `-p 8080` option to specify port 8080 and `-e production` to specify the production environment. In Chapter 4, *Virtual and Dedicated Hosts*, on page 72, you'll learn more about configuring Mongrel for more advanced needs. In the meantime, your hosting provider probably has some documentation for their policies for dealing with Mongrel. Look them over, and follow them closely. You can point your browser at your domain name and see the starter application you built earlier. You will probably not have to specify your port number, assuming you're following the port allocation and other instructions that your hosting provider gave you.

If you're working with Mongrel, you're done. Whistle a happy tune, and skip ahead to Section 3.8, *Application Setup: Rails Config Files*, on page 60. You can skip ahead while I appease the poor pitiful sots who must deal with `lighttpd` or `Apache`.

Apache + FastCGI

All kidding aside, `Apache` is a great general-purpose web server. In a Rails environment, `Apache` works best for serving static content. Serving your Rails application will take a little more time to configure. To use `Apache`, you'll have to configure Rails to run using `FastCGI`. Then you'll tell the server to forward your request to those Rails `FastCGI` processes. For security's sake, most shared hosts control the majority of the configuration options for the `Apache` web server. However, you can specify some directives that will make your Rails application run more smoothly.

By default, Rails provides an `.htaccess` file for `Apache` in the public directory of new Rails apps. By default, this will run your application in normal, syrup-slow CGI mode. If you chose a quality shared host with `FastCGI` support, you should turn on `FastCGI` in `.htaccess`. You'll do so

by editing the `public/.htaccess` file in your Rails project to look like the following:

```
# Make sure the line that specifies normal CGI
# is commented out
# RewriteRule ^(.*)$ dispatch.cgi [QSA,L]
# Make sure this line is uncommented for FastCGI
RewriteRule ^(.*)$ dispatch.fcgi [QSA,L]
```

You can include many other directives in the `.htaccess` file. I won't walk through all of them right now, but one important one is specifying a few custom error pages. No one wants to see “Application error (Rails).”

Even though it is not turned on by default, Rails provides a `404.html` file that you can customize to gently inform the visitor that a page could not be found. To use these static error pages, make sure you remove any default error directives and use the following instead:

```
ErrorDocument 404 /404.html
ErrorDocument 500 /500.html
```

You can even write a custom Rails controller that handles 404 (Page Not Found) errors and provides a search box or a list of popular pages:

```
ErrorDocument 404 /search/not_found
```

You will need to verify that you have the correct path to the Ruby interpreter for your host's servers in your `dispatch.fcgi` file. The path to Ruby in your `dispatch.fcgi` file will be set to the location of Ruby on the machine you used to generate your Rails application. The easy way around this problem is to use following line instead:

```
#!/usr/bin/env ruby
```

That line will load the environment to set the `$PATH` variable and then find the Ruby binary by looking at the path. This makes it portable across most Unix-like operating systems.

All in all, Apache + FastCGI is a pretty decent general-purpose Rails platform, but you'll need to watch a few quirks. You'll need to make sure that Apache creates no rogue FastCGI processes. I'll walk you through that process in Chapter 6, *Managing Your Mongrels*, on page 124. I'll walk you through these items and a few others in the sections to follow.

That's pretty much the story for configuring your Rails application with Apache and FastCGI. If you don't need `lighttpd`, you can skip the next section.

lighttpd

The lighttpd web server runs independently of the other websites on your shared server, so you must include a complete lighttpd.conf file to start it. If you have installed lighttpd on your development machine, Rails will copy a minimal config file to the config directory that you can use as a reference. This file is also located inside the Rails gem in the rails<version>/configs/lighttpd.conf directory.

If you are running several domains or subdomains with one instance of lighttpd, you should keep the lighttpd.conf file in a directory outside any specific Rails application. A good place might be ~/config or ~/lighttpd in your home directory.

I wrote a specialized Capistrano recipe that builds a lighttpd.conf file customized for running lighttpd on TextDrive. It could easily be customized to use the file paths of other hosts as well. You can find it at the Shovel page.⁵

3.8 Application Setup: Rails Config Files

A freshly generated Rails application needs only a minor amount of customization to run in production mode.

config/database.yml

First, make sure you have edited config/database.yml with the appropriate information for the database you created earlier:

```
production:
  adapter: mysql
  database: db_production
  username: db_user
  password: 12345
  host: my_db.brainspl.at
```

In my experience, you can omit the socket attribute for most shared hosts. Some shared servers are configured to use localhost as the host, where others require you to create a separate subdomain for your database. Finally, be sure you use the correct username for the database. It may be different from the account you use to SSH to the server.

5. <http://nubyonrails.com/pages/shovel>

For the most security, you shouldn't keep this file under source code control. A common technique is to copy this file to a safe place on your server and add an `offer_update_code()` task to Capistrano that copies it into the live application after it is deployed. (See Chapter 5, *Capistrano*, on page 92 for more details.)

RAILS_ENV

Rails was intelligently designed to run with different settings for development, test, production, or any other environment you define. It will use the “development” environment unless told otherwise. When running on your shared server, you will want “production” mode to be in effect.

There are at least three ways to set the `RAILS_ENV` for your application, each with different repercussions. The goal is to set it in a way that will take effect on the server, but not on your local development machine.

Option 1: Set the Environment in Your `.bash_login` File on the Server

The best way is to set the actual `RAILS_ENV` environment variable. Rails and Capistrano work best with the bash shell.

```
ezra$ ~/.bashrc
export RAILS_ENV="production"
```

This is the most comprehensive way since migrations and other scripts will also use that environment. Keep in mind this works only if your SSH user runs your web server. If not, you'll need to use one of the following approaches.

Option 2: Set the Environment in Your Web Server Config File

If you can't set the Rails environment variable in your shell, you must look for another way to do it. The next best place is in your web server configuration. Most shared hosts won't let you set environment variables from a local `.htaccess` file. You must use one of the other options if you are using Apache.

However, you can set the environment if you are using `lighttpd`.

Edit the bin-environment directives in the FastCGI section of your server's `lighttpd.conf`:

```
fastcgi.server = ( ".fcgi" =>
  ( "localhost" =>
    (
      "min-procs" => 1,
      "max-procs" => 1,
      "socket"     => "log/fcgi.socket",
      "bin-path"   => "public/dispatch.fcgi",
      "bin-environment" => ( "RAILS_ENV" => "production" )
    )
  )
)
```

This setup can work well even if you use `lighttpd` locally for development. When you start `./script/server` for the first time, Rails creates a file in `config/lighttpd.conf` that sets `RAILS_ENV` to development. When you start your local server with `./script/server`, that script then uses the `lighttpd.conf` file to start `lighttpd`. If you put your shared server's `lighttpd.conf` in a different location, you will have harmony between your local and remote environments.

In practice, most seasoned Rails developers run `lighttpd` this way, since most people want to run several domains or subdomains with one `lighttpd` server. Your `lighttpd.conf` is usually located somewhere in your home directory, and your Rails applications are located in a subdirectory (such as `sites`). Even though each Rails application may have its own `lighttpd.conf` file, these will be ignored on the production server, exactly as they should be.

Option 3: Edit `environment.rb`

The final way to set the environment for a shared host is to uncomment the following line at the top of `environment.rb`:

```
ENV['RAILS_ENV'] ||= 'production'
```

Normally, Rails defaults to development mode, expecting other environments to specify a different `RAILS_ENV` if necessary. Uncommenting this line changes the default to production. In practice, production is a much better default. If you use `lighttpd` for development, Rails will make a `lighttpd.conf` file for you that explicitly specifies development mode. `WEBrick` will use development mode unless explicitly told to do otherwise. Either way, you get the right environment.

3.9 The Well-Behaved Application

The shared hosting environment is a jungle of constantly changing elements. One of the otherwise peaceful coinhabitants of your server may momentarily take the lion's share of resources. Your host may upgrade software or hardware for maintenance or out of necessity. Your host may enforce resource limits and kill your application if it bogs down the CPU for too long. By following a few simple guidelines, you can make your application behave as well as possible and also protect yourself from other poorly behaved applications.

One Rails App per User

Some shared hosts allow you to create several user accounts, and each user account has its own memory allowance. So, you will benefit if you run one Rails application per user account. If you need to run another application, you should create a new user account and run the app under that user.

Be Miserly with Memory

A bare Rails application with no other libraries will use 30MB to 50MB of memory. Adding the RMagick image manipulation libraries can easily push that to more than 100MB. Unlike VPS servers, shared servers don't usually sell plans where a fixed amount of memory is guaranteed to your application. However, there is a fixed amount of total memory available to all applications on the server, and some shared hosts will periodically kill processes that use more than their share, usually about 100MB.

This practice of killing processes is especially problematic if you are trying to run the `lighttpd` web server. If the host's maintenance bot kills your `lighttpd` daemon, `lighttpd` will not restart itself automatically. To make matters worse, some hosts restrict the use of automated scripts that restart dead or zombified FastCGI processes. Even though the Apache web server can leak memory when running FastCGI processes, it will automatically restart them if they have been killed. The bottom line is that you need to conserve memory and make sure you don't have any leaks. Rails doesn't have any silver bullets for dealing with memory leaks, but I'll tell you what I know throughout the chapters that follow.

The cruel reality is that a Rails app can outgrow the shared server environment. I wrote an application for a client that used several large libraries including RMagick and PDF::Writer. The overall memory

requirements meant that the app was too large to run reliably within the constraints of a shared host. Both are useful libraries, but if they cause your app to use too much memory, you must either reconsider your choices or move to a virtual private server. I'll walk you through memory in Chapter 9, *Performance*, on page 224.

In all likelihood, you already know that some applications just won't work in a shared hosting environment. If you're ramping up the scalability curve on the next Facebook application, you already know that shared hosting is not the ultimate answer. And if you have applications with intense number crunching, your shared hosting provider and anyone on your box will curse you until you give up. As a hosting provider, I'm watching you. Do the right thing.

3.10 Troubleshooting Checklist

Rails deployment means more than dropping in a JAR file or a PHP file. Even if you follow the previous instructions precisely, your installation may not run smoothly. Here are some common problems and ways to easily fix them.

Look at the Web Server Error Logs (in Addition to Rails)

One of the best places to start troubleshooting are the web server's error logs, especially when you are initially debugging your configuration. Rails can't start writing to `production.log` until it has launched, so Rails logging can't help you if your initial setup has critical problems. File permission problems and other errors will show up in the web server's `access_log` and may give you clues about what is going wrong.

The `tail` command is often the most useful way to view your logs. Normally, `tail` shows the last ten lines of a file. You can ask for more lines with the `-n` argument (for example, `tail -n 50 access_log`). For real-time output, the `-f` argument will continue to print new lines as the web server writes them. On Unix-based systems, you see this kind of output when you run the Rails `script/server` command during development.

With some versions of the `tail` command, you can even tail several logs simultaneously. If your operating system doesn't include a capable version of `tail`, you can download a version written in Perl by Jason Fesler.⁶

6. http://gigo.com/archives/Source%20Code/xtailpl_tail_multiple_files_at_once.html

In any case, find where your host keeps the httpd logs, and tail them all:

```
ezra$ tail -f log/production.log log/fastcgi.crash.log ↵
          httpd/error_log httpd/access_log
```

Refresh any page of your site, and you should see some kind of output in the logs:

```
[Mon April 17 11:20:20 2007] [error] [client 66.33.219.16]
FastCGI:server "/home/ezra/brainspl.at/public/dispatch.fcgi"
stderr: ../../config/./app/helpers/xml_helper.rb:11:
warning: Object#type is deprecated; use Object#class
```

A common error is Premature end of script headers, which is quite vague and usually signals a problem that needs to be debugged separately. However, file permission errors will show up with the full path to the file or folder that has the problem.

Do Files Have the Correct Permissions?

Rails has to write to several kinds of logs, so those files and folders need to be writable by the user who runs the FastCGI processes. Usually this login is the same as the user account used to SSH to the server, but it might be different. If you have other FastCGI processes or Mongrels already running, you can run the top command and see what user is running them:

```
ezra$ top
  PID USER  PR  NI  VIRT  RES  SHR  S %CPU %MEM  TIME+  COMMAND
25698 ezra   11   2 22072 21m 2288  S  0.0  1.1  0:03.30  dispatch.fcgi
```

Here are a few important files and the permissions they must have:

- The log directory and files must be writable by the user running the FastCGI or Mongrel process. With Capistrano, the logs directory is a symbolic link to the shared/logs directory. Make sure both, and the files inside, are writable.
- The public directory must be writable by the user running the FastCGI or Mongrel process if you are using page caching. Rails will run if the public directory is not writable but will not use caching.
- Capistrano makes a system directory inside public. It also makes links from this directory to the shared directory holding the core Rails logs, including production.log. The benefit is that you can store uploads and other files there, and they will remain between

deployments. If you keep the page cache or uploads there, the folder (and the link) must be writable by the FastCGI user.

- `dispatch.fcgi` must be executable, but not writable by others. Properly configured web servers will refuse to execute files if `dispatch.fcgi` is writable by the general public. `dispatch.fcgi` is the main file that handles requests and fires them off to the controllers in your application, so it must be executable.

If you have permission problems with any of these files, you can remedy the problem with the Unix `chmod` command. The `chmod` command has many capabilities that are beyond the scope of this book. You can read about it in excruciating detail in the Unix manual page by running the command `man chmod`:

```
ezra$ chmod 755 public/dispatch.fcgi
ezra$ ls -l public/dispatch.fcgi
-rwxr-xr-x 1 ezra group 855 2006-01-15 02:03 dispatch.fcgi
```

The `rw` means that `ezra` can read, write, and execute the file. The first `r-x` means that only others in the same group can read and execute the file. The last `r-x` means anyone can read and execute but not write the file. This permission set is the proper setup for the `dispatch.fcgi` file.

Did You Specify the Correct Path to the Ruby Executables?

When generating a new Rails application, Rails uses the location of your local Ruby executable to generate the dispatch scripts in the `public` directory and all the scripts in the `script` directory.

Your shared server may not have a copy of Ruby in the same location. For example, I used MacPorts to build a fresh copy of Ruby on my development machine, so my local copy of Ruby is located at `/opt/local/bin/ruby`. Even though I made a symbolic link from `/usr/bin/ruby`, Rails builds all my script files like this:

```
#!/opt/local/bin/ruby
# ERROR: Incorrect for most production servers!
```

If you've already generated your application, you need to manually edit your configuration files, including possibly `dispatch.fcgi` and others, to match the actual location of Ruby on your shared server. You can find this information by connecting to your server via SSH and issuing this command:

```
ezra$ which ruby
/usr/local/bin/ruby
```

Note the path returned by the `which` command. If you know this information before you start building your application, you can send it to Rails as you generate your application:

```
ezra$ rails my_rails_app --ruby /usr/local/bin/ruby
```

Be careful! Make sure you substitute the Ruby install path you noted earlier for `/usr/local/bin/ruby`. All the relevant files will then start with the correct location:

```
#!/usr/local/bin/ruby
```

If your development machine doesn't have a link to Ruby in that location, you can make one to match your production server:

```
# Link to the actual location of Ruby from an aliased location
ezra$ sudo ln -s /opt/local/bin/ruby /usr/local/bin/ruby
ezra$ sudo ln -s /opt/local/bin/ruby /usr/bin/ruby
ezra$ sudo ln -s /opt/local/bin/ruby /home/ezra/bin/ruby
```

Now I can set the application's shebang⁷ to the location on the remote server, but the application will still run on my development machine.

Does the Sessions Table Exist in the Database?

Some of the most baffling errors happen when Rails can't save its session data. I've gotten a completely blank page with no errors in any of the logs. Often, the problem is an unwritable `/tmp` folder or an absent sessions table. Fortunately, Rails 1.1+ has been enhanced to give a more informative message when this happens.

By default, Rails stores user sessions in cookies. Cookie-based sessions are fast, requiring no server-based disk access. This session storage solution scales well because the server has very little overhead for each additional client. There are a couple of limitations, though. Sessions are limited to roughly 4,000 characters. Also, Rails stores cookie session data without encryption so it is not secure. If you need large sessions or secure sessions, databases may be the way to go. If you are storing user sessions in the database, you may have started by creating the sessions table in your development database like this:

```
ezra$ rake db:sessions:create
```

This command will create a numbered migration file that can be run against the production database to add a sessions table. Then, you'll

7. *shebang* refers to the `#!` characters. The `#!` characters specify the interpreter that will execute the rest of the script.

have to add the database sessions to your environment by the line `config.action_controller.session_store = :active_record_store` to `environment.rb`.

Are Current Versions of Necessary Files Present?

Rails is a complete framework and expects to find files in certain places. It is common to omit core files with the `svn:ignore` property while developing. However, those files must be included in your build process on the production server.

A common example is `database.yml`. For security reasons, people don't want to have their name and password flying all over the Internet every time they check out the code for a project. But if it isn't on the production server, Rails won't be able to connect to the database at all.

A solution is to save it to a safe place on the server and make an `after_update_code()` task to copy it into the current live directory. (See Chapter 5, *Capistrano*, on page 92 for a detailed example.)

If you have saved a copy of the core Rails libraries to the vendor directory, your application will not run unless all the libraries are there. And like the rest of Rails, filenames and directory names matter. I once saw an odd situation where the built-in `has_many()` and `belongs_to()` methods were causing errors. The rest of the application ran fine until the programmer asked for data from a related table. We discovered that the actual filenames in ActiveRecord had somehow been truncated and were causing the error.

Is the RAILS_ENV Environment Variable Set Correctly?

One of the most common problems during deployment is an incorrect `RAILS_ENV`. For your production server, `RAILS_ENV` should be set to `production`.

There are several ways to set `RAILS_ENV` and several ways to determine the current setting of `RAILS_ENV`. The only thing that really matters is the value of `RAILS_ENV` inside your Rails application, and there is no direct way to test that (apart from a fully running application).

This can also be confusing since some scripts don't tell you what environment they are using, and others don't tell you what environment they are using until they are running properly.

However, you can use the following troubleshooting tools to find out what `RAILS_ENV` might be.

The about Script

Rails 1.0 and above ship with a script that prints useful information about your configuration. Unfortunately, this will not be accurate if the environment was set in `lighttpd.conf`.

```
ezra$ ./script/about
About your application's environment
Ruby version           1.8.6 (i686-linux)
RubyGems version       1.0.1
Rails version          2.0.2
Active Record version  2.0.2
Action Pack version    2.0.2
Active Resource version 2.0.2
Action Mailer version  2.0.2
Active Support version 2.0.2
Application root       /Users/ez/brainspl.at/current
Environment            development
Database adapter       mysql
Database schema version 3
```

Echo

If you have set the environment in your shell, you should be able to SSH to your shared server and print it out like this:

```
ezra$ echo $RAILS_ENV
production
```

It should also take effect when you start the console:

```
ezra$ ./script/console
Loading production environment.
>>
```

Is the Database Alive and Present?

Although Rails can run without touching a database, most applications use the database in some way. If the database doesn't exist, your application will not run and will show errors.

You can test the database independently of the rest of your application. Call up the console in production mode, and you should be able to send simple queries to the database:

```
ezra$ ./script/console production
Loading production environment.
>> User.find 1
=> #<User:0x263662c @attributes=...
```

If this doesn't work, one of the following may help:

- Can you connect directly to the database with a command-line client such as `mysql` or `psql`? If not, the database may be down or may not be accessible from your shared server. This method is not always conclusive. I have used hosts where the command-line MySQL client cannot connect to the server but the Rails application runs without any problems.
- Do you have the proper database, username, password, host, and port specified in the production section of `config/database.yml`?

Has the Database Been Migrated to the Correct Version for Your Application?

You may have run your migrations, but was the right database affected? If `RAILS_ENV` is missing from the shell, you may have migrated your development or test database instead of the production database.

The easiest way to discover your current `schema_version` is to use the `./script/about` command. Newer versions of Rails will display the schema version on the last line:

```
ezra$ ./script/about RAILS_ENV=production
About your application's environment
Ruby version           1.8.6 (i686-linux)
RubyGems version       1.0.1
Rails version          2.0.2
Active Record version  2.0.2
Action Pack version     2.0.2
Active Resource version 2.0.2
Action Mailer version  2.0.2
Active Support version  2.0.2
Application root        /Users/ez/brainspl.at/current
Environment             development
Database adapter         mysql
Database schema version  47
```

If this doesn't show the version you expect, you may need to run your migration again or check your other database connections to make sure the correct database is being addressed. To reapply the migration manually, issue this command:

```
ezra$ rake db:migrate RAILS_ENV=production
```

3.11 Conclusion

When possible, I run applications on a VPS or dedicated server. However, I still have several shared-hosted applications that run with an acceptable degree of reliability. By following the steps mentioned here, you can also run small applications reliably on an inexpensive, affordable shared host.

In this chapter, you learned to set up a typical shared hosting Rails environment. You also learned that you can't push shared hosts too hard, and you can't rely on them for perfect service. In the next chapter, you'll see the alternative: virtual and dedicated hosting. If you're bursting at the seams and hearing your neighbor through paper-thin walls, it's time to move up. Read on.

Virtual and Dedicated Hosts

Most shared host plans are roughly equivalent to a 7-by-7 apartment with a shared bathroom and no kitchen. After a little time on that shared host, it may start to feel pretty cramped. When you come to a point where you are pushing the limits of your shared host, it's time for your own virtual private server or dedicated server. You will be able to stretch out and take over the whole environment without worrying about fighting others for your CPU time and memory. You're probably thinking to yourself, "Ah, the good life."

Not so fast. With your newly found space and flexibility comes great responsibility. No one else will hold your hand and watch over your server, unless you're willing to pay big bucks for a fully managed server. You will have to decide whether that extra cost of disk redundancy through RAID is worth it; you will be responsible for backing up your system and restoring the data should something go wrong. For better or worse, you are living the great American dream: full home ownership. This chapter will walk you through the move-in.

4.1 The Lay of the Land

In this chapter, I'll show you how to build out a server from scratch. You'll first build and install your operating system. Then, you'll build some of the tools that you will need to build the Ruby stack. You will move on to build out the Ruby stack, including Ruby, Rails, RMagick, and Mongrel. You will also install a database and your web server, though you won't integrate your web server until Chapter 7, *Scaling Out*, on page 144. You'll have a working Rails installation like the one in Figure 4.1, on the next page.

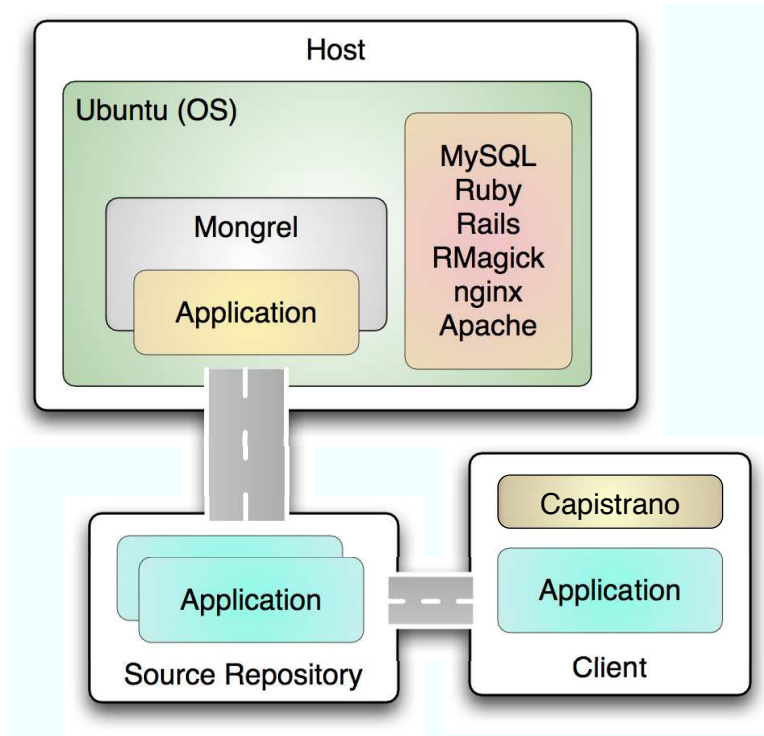


Figure 4.1: Dedicated server map

In practice, the setup will not work much differently from the one you saw in Chapter 3, *Shared Hosts*, on page 44. You will serve each request with a single Mongrel. That architecture will not scale, but your emphasis is on building a workable foundation that you can use as a foundation. In later chapters, you'll cluster your Mongrels, and then if your application requires it, you'll scale out using one of the options in Chapter 7, *Scaling Out*, on page 144. For now, focus on building all the pieces that you'll need through the rest of the book.

Introducing Your Own Host and Administrator

As if deploying a Rails application to someone else's server wasn't enough fun, now you're ready to build your own machine. Whether you want the role or not, you're an administrator. You earned that rank the moment you built your own environment. I recommend you take your new role seriously. As an administrator, you have many

responsibilities—topics that other books will do a better job of exhausting. You can group your responsibilities into these categories:

- Security and stability
- Configuration and upgrades
- Documentation

Keeping your server secure and stable is a tough business and is a subject I won't even attempt to tackle in this book. Managing configuration and upgrades can be a weekly occurrence, and patching the system is an important security practice. But the one that I really want to drive home is documentation. Developers have a bad habit of avoiding documentation. Programmers I know use insanely creative rationalizations. Here are some of the best:

- “You may not think you have the time or skill to pull it off, but you'll pay with your time now or later.”
- “You might think that documentation is always out-of-date and unable to keep up with changes in code, but I'm not talking about code.”
- “The configuration won't change as fast as code, and even if it does, that's all the more reason to document it.”

None of the old arguments against documentation work for infrastructure. As system administrators, we have to document our configurations. The following tips will help with managing documentation:

- Keep a server journal next to the machine or in a common place if there are multiple administrators or remote servers. Treat it like the conch from *Lord of the Flies*: only the person with the journal can modify the server configuration. In the journal, record and date which changes were made and why.
- Keep a directory containing dated session logs in a well-known directory. If at all possible, comment the logs with “why?” questions. It's often easy to see what someone did with the logs, but the “why?” needs to be filled in to communicate with others.
- Update formal documentation once per week or anytime a major change is made. Formal documentation includes simple diagrams and organized sections of documentation for key infrastructure components.

- Make sure everyone reads the documentation. Let people know when you update the documentation, and walk them through it over coffee. These practices will ensure that they understand the system and also encourage discussion and questions about the system.

When you must move to multiple servers, you will need to do your best to keep the configurations in sync. And by “in sync,” I mean preferably identical. You will want to try to automate differences in configuration by your application or even Capistrano, and your service provider will manage others for you. To keep your configurations identical, you will need good organization and up-to-date documentation. I’ve preached enough for now. Roll up your sleeves, and let’s get to work.

4.2 Virtual Private Servers

Even after you’ve decided that shared hosting is not enough, one size does not fit all. Before you decide to spring for that dedicated host package, take a deep breath and look at another attractive alternative first. The virtual private server, or VPS for short, is the first logical step up from a shared server plan. Some hosts might call these virtual dedicated servers (VDSs). These type of servers run in a virtual machine. Multiple VM instances run on one physical hardware server. Before you run away shrieking in horror, you need to know that a VPS is not a shared server package. You will get complete root access to your VPS, and often you’ll even pick your operating system from some Linux distribution or FreeBSD.

Your host may run one of quite a few different server virtualization software packages. Out of all of these that I have tried, Xen is my favorite. Xen is a relative newcomer to the virtualization scene, but the open source package is built right into certain Linux kernels, so the virtualized server processes run a little closer to the metal. Xen also offers superior disk I/O, which is a big issue for anything that deals with many files. And guess what? The majority of the time, a web application does nothing more than deliver file after file to the user. More and more web hosts are making Xen-based virtual servers available to hosting clients, so it shouldn’t be hard to find one.

Once you acquire your own VPS, it acts like a dedicated box. You have full root access to install or remove anything you need. On a Xen-based VPS, you could even recompile your own kernel if you wanted to (but

you should ask your host provider first). Since most virtual servers will run on high-end hardware, you can get very good performance. Of course, the more VPSs that your host tries to squeeze onto one physical box, the less resources there are to go around. It is a good practice to ask the provider about the hardware setup and exactly how many virtual machines it runs per box. Generally speaking, bigger slices on bigger boxes are better. If you need help interpreting the numbers, ask an expert. You might pay one if you have a lot of money riding on the answer, or you might simply post the question on one of the many excellent Ruby on Rails forums.

Memory

Usually, your performance bottleneck will not be processing power but memory. Some shared hosting providers oversell their hardware in the hopes that not everyone will be running full blast at once. When too many customers need too much, your VPS can easily run out of memory and start swapping out memory pages to disk. To understand the impact on performance, imagine an Olympic sprinter running at full speed in perfect conditions and then plunging him into water up to his chest to finish the race. But with Xen-based VMs, the memory allocation you get for your server is your memory only. A Xen-based architecture will not allow a hosting provider to oversell the memory of the physical box, and your application can run in the clean air of memory instead of the quagmire of disk swapping. Products like Virtuozzo and OpenVZ are a few to investigate.

Depending on what you're doing, I'd recommend a minimum of 160MB to 256MB of RAM on your VPS. This amount of memory will allow you to run one or two small Rails sites, depending on the application's resource usage. But you can be more precise. Rather than take a blind guess, you can estimate how much you will need based on one critical question: how many Mongrels or FastCGI listeners will you need?

One or two back-end processes is plenty for many Rails applications. A typo or Mephisto blog that gets a medium amount of traffic will usually be fine on one process. A typical Rails process can take anywhere from 35MB to 120MB, but some Rails application may take more. Keep in mind there are always exceptions to the rule, and you should test locally to see what your memory consumption is before you order your VPS. I'll show you how in Chapter 9, *Performance*, on page 224.

Even if you get your initial memory size wrong, a VPS system is very easy to upgrade. If you need more RAM, disk space, or other resources, usually all you have to do is request these from your host and reboot your VPS. When it comes back online, you will have the new resources available without the need to change anything in your settings to take advantage of them. Another benefit of the virtual server approach is the ability to easily migrate your entire server to another physical box or host when the time comes. If you choose the right provider, upgrading with your traffic should happen smoothly.

Using Lightweight Web Servers

Mongrel is emerging as the de facto method of deploying a Rails application on a VPS. You can run a blog or smaller apps on one Mongrel alone. Should you need another web server in front of Mongrel for static content, using nginx or lighttpd can be a huge win. These servers use fewer resources than Apache and are very fast. If you want an alternative to Mongrel, nginx and lighttpd have FastCGI support that is top-notch and stable.

Most hosting providers offer a number of Linux distributions to choose from. Primarily, you want a distribution with a minimal footprint. When you run on a smaller memory system, make sure to install only what you need and no more. From there, you should build only what you need. In the end, you will come out with a leaner, faster server.

The instructions for setting up a VPS are basically the same as setting up a dedicated server. You'll need to know a little more about dedicated hosting before I move into the setup tutorial.

4.3 Dedicated Servers

Say you have written the latest popular Rails web 2.0 application and a shared host is no longer enough. Your shared host admin is screaming at you about resource usage, he's not responding to your requests for support quickly enough, and you've decided to either challenge him to a duel or switch to a higher plan. It's time to move. You're ready for root, and your customers are ready to see your fabulous content without the dreaded spinning globe, or whatever icon their browser is spinning these days.

With a dedicated server, you don't have to worry about memory constraints or disk space as much. A good starting system would have a

modern processor, 512MB to 1024MB RAM minimum, and a spacious hard drive. A system like this will let your application service a lot of traffic and concurrent users. I'm not going to bore you with statistics here because there are too many variable factors to weigh, but once you're on a dedicated box, if your application keeps growing to the point where you need to start thinking about a cluster, you will be ready.

Typically dedicated boxes cost more than VPS systems. A starter VPS can run you US\$25 to US\$60 per month, whereas a starter dedicated box is usually closer to US\$150 to US\$300.

Even if you do get your own dedicated box, you may want to consider using Xen. In the real world, Xen offers acceptable performance and gives you a nice long-term solution for scaling your system out as you grow. Installing and configuring Xen is out of scope for this book, but it is definitely worth your time to investigate this alternative. You trade a small percentage of raw performance for ease of administration and scalability. With Xen you can partition your dedicated server into a number of targeted VPS servers that you can easily move to other boxes as you grow. I'll tell you how to do exactly this in the Chapter 7, *Scaling Out*, on page 144.

4.4 Setting Up Shop

Building a deployment environment is not for the impatient, but with a good knowledge of the command line and a willingness to google, you should be able to build your own setup for running Rails applications in production. I'll spell out the rest for you. This is all well-traveled territory, so if things go wrong and you can't find the answers here, don't be afraid to go searching for answers. I'll show you many of the answers that you need, and Google can help you find the rest.

Regardless of whether you decide to go with a VPS or dedicated server, your Rails setup will be the same. I'll use Ubuntu Linux 7.10 Server Edition, but don't worry if your favorite server platform is OS X, BSD, or another Linux distribution. Everything pertaining to web server and Rails configuration will work pretty much the same way on any Unix-like operating system.

I like to build from scratch using Ubuntu Gutsy Gibbon Server. You can get the download image and instructions online.¹ In all likelihood,

1. <http://www.ubuntu.com/getubuntu/download>

you won't wind up building your own system. Almost any virtual or dedicated hosting provider offers this as an option when you set up your account with them. If not, just ask them to install the Server version of Ubuntu for you. They will also set up the basic network interface to work with their network and data center.

From here on out I'll assume you are starting from a working install base with the right network install. If you are installing on your own server at home or work, you can get detailed Ubuntu Server installation instructions online.²

Any virtual host provider will have some version of SSH installed and configured, but you may need to install OpenSSH2 if you're building your own host locally. Use the `ssh` install package by typing `sudo apt-get install ssh` to get things working.

I can't possibly cover all the details for securing a Linux server, but I'll give you a few important tips along the way. Here's the first. Use `ssh` and `sftp` or `scp`, not `ftp` or `rsh`. If you don't, all your communications will be in the clear, directly readable at any of the intermediate hosts between your local machine and server. To use SSH, you will need SSH on both the client and the host. I've already told you about the host system, so shift your attentions to the client. If you are on OS X, Linux, or BSD, you undoubtedly have a client installed, but if you run Windows locally, you will want to install PuTTY. The Windows de facto standard, PuTTY is an excellent and free SSH program you can find online.³ Follow the instructions you find there, and you'll be ready for the rest of this book.

Building your production setup is not a trivial exercise. Here is the rundown of the whole list you'll be installing:

- *Gnu Compiler Collection (GCC for short) and associated tools.* You'll use it to build several components including RubyGems and the RMagick plug-in.
- *Ruby and RubyGems.* You'll get the latest stable version of Ruby and the RubyGems third-party library packing and distribution system.
- *Rails.* After installing the operating system and RubyGems, installing and configuring Rails will be surprisingly easy.

2. <https://help.ubuntu.com/>

3. <http://www.chiark.greenend.org.uk/~sgtatham/putty/download.html>

- *MySQL and the mysql-ruby bindings*. You can use a variety of different database servers, but I'm going to go with the most popular Rails database engine.
- *Subversion*. Capistrano will check out your code right out of your Subversion repository.
- *Mongrel and dependencies*. Mongrel is rapidly becoming the de facto standard for serving Rails applications.
- *ImageMagick and RMagick*. Many modern web applications allow the uploading of images. RMagick can help by automatically creating thumbnails and cropping images.
- *FastCGI Developers Kit and the Ruby FastCGI bindings*. If you're running Apache or lighttpd instead of Mongrel, you will want to replace the slower, default CGI right away.
- *nginx*. This tiny web server is lightning in a bottle, making it a good substitute for Apache with many installations. Installing it is easy if you want to go that route.

With these elements, you will have the basic stack that will serve as the basic foundation for all we do in the remainder of the book. We will cover optimizing the individual web server configurations in other chapters in the book. Once you've completed the steps in this chapter, you will be able to run a basic production Rails application.

I'm going to break a cardinal publishing rule here and repeat some details from Chapter 1, *Introduction*, on page 8. I'm doing so not to pad the book but to protect you from major havoc. You're going to issue commands against your local box and remote servers, with user permissions and root permissions. You'll need to understand where you are at all times and how much power (and potential for damage) you have at any given time. Moving files around and installing software can destroy lots of work if you're not extremely careful, so look for the clues that tell you where and how you're logged in.

If I'm logged on to my production system, the login will begin with `ezra`. If I'm logged in locally, the login will begin with `local`. In the bash shell on *nix systems, the `#` command-line prompt tells you that you are logged in as root, and a `$` means you are logged in as a regular system user. I'm going to use bash. If you want to use a different shell, make sure you understand the prompt indicators for your system.

Configuring the Server

It's time to get started. I'm going to name my virtual server «*tracklayer*». Whenever you see «*tracklayer*» in the commands, replace it with the IP address or domain name of your server.

You'll need a root user and a regular user. Admins usually set up Ubuntu with a normal user account instead of a root account only. If you are configuring most other Linux distributions, you will need to make a normal user and add yourself to the `/etc/sudoers` file.

If you have a normal user account, use it to log in and skip past the next two session listings. If you have only root, you'll need to create a normal user. SSH in to your new account's IP with your root user and password:

```
local$ ssh root@tracklayer
root@tracklayer password: <enter your password>
```

If all is well, create your normal user account:

```
root# adduser ezra
Adding user `ezra'...
Adding new group `ezra' (1001).
Adding new user `ezra' (1001) with group `ezra'.
Creating home directory `/home/ezra'.
Copying files from `/etc/skel'
Enter new UNIX password:
Retype new UNIX password:
# you will be asked a few more questions,
# fill them out however you like.
```

Be careful with root. After you've established your account, always log in to your machine as your own user instead of root. Simply use `su` or `sudo` to gain root privileges as needed. `su` stands for *super user*, and `sudo` stands for *super user do*. If you're not logged in as root, become root now:

```
$ su -
Password:
root#
```

Now edit `/etc/sudoers`. You should use a program called `visudo` to edit the `sudoers` file because `visudo` won't let two people edit at the same time.

```
root# visudo
```

Use your arrow key to move the cursor down, and add this line at the end of the file:

```
yourusername ALL=(ALL) ALL
```

Securing SSH

Most experienced *nix admins tend to run `sshd` on high port numbers. Here's why. Crackers commonly create automated attacking programs called *bots* that crawl the Net, visiting one machine after the next to find machines with a running SSH daemon. Then, the bot uses an automated script with a dictionary to try many combinations of usernames and passwords. The attacks are so prevalent that these days most servers on the Internet will experience this kind of attack with some frequency. If you have a weak login/password combination on a live SSH port, you're toast, especially if `sshd` is on the standard port 22. Since most of these attack bots will not scan ports higher than 1024, you should always assign `sshd` to a free port above 1024.

Modify the port for `sshd` by editing `/etc/ssh/sshd_config`. Edit the line that looks like this:

Port 22

Change it to this:

Port 8888 # or any unused port above 1024

Then save the file and quit the editor. And don't forget to restart the SSH server daemon.

Now press the Escape key, and type `:wq`. This means write file and quit.

For security's sake, you don't want to allow SSH root logins because an unauthorized login would be disastrous. Edit `/etc/ssh/sshd_config`, replacing this line:

PermitRootLogin yes

with this one:

PermitRootLogin no

Now reload its `/etc/ssh/sshd_config` to pick up the new settings:

```
root# /etc/init.d/sshd reload
* Reloading OpenBSD Secure Shell server's configuration sshd [ ok ]
```

For security and to make things easier on yourself, using SSH keys instead of passwords for logins is a great technique. Let's create a pair of public/private keys and get them installed on our new server; the key generation is done on your local machine:

```
local$ ssh-keygen -t dsa
```

This will prompt you for a secret passphrase. If this is your primary identity key, make sure to use a good passphrase. When this is done, you will get two files called `id_dsa` and `id_dsa.pub` in your `~/.ssh` directory. Note that it is possible to just press the Enter key when prompted for a passphrase, which will make a key with no passphrase. This is a Bad Idea™ for an identity key, so don't do it! You will learn how to achieve passwordless logins in a secure manner shortly.

Now we need to place your public key on the server. Here is a nice bash function that will do this for us; place this in your `~/.bashrc` or `~/.bash_profile` depending on the type of computer you are using locally. (The function assumes you've already created the `.ssh` directory, so if you haven't done so, create it first.)

```
function authme {
    ssh $1 'cat >>.ssh/authorized_keys' < ~/.ssh/id_dsa.pub
}
```

Once that is in your shell's rc file, you will need to start a new shell or source the file:

```
local$ . ~/.bashrc
```

With this all in place, we can now use the `authme` command to place your new keys on the server (replace `tracklayer` with your IP or host-name):

```
local$ authme tracklayer
```

You will be prompted for the password, and your key will be placed on the server. Now you will want to enter a new shell with your SSH keys loaded. This will allow you to start a shell and enter your passphrase for your private key only once, and then you will be able to `ssh` to anywhere your key is placed without entering the passphrase again:

```
local$ ssh-agent sh -c 'ssh-add < /dev/null && bash'
```

Now you can `ssh` to your new server with no passphrase entry:

```
local$ ssh tracklayer
```

Install the GCC Tool Chain

You will need to install a compiler tool chain to build and install many elements including RubyGems. The `build-essential` package has everything you need to build the components you'll need to install later. Install it on Ubuntu like so:

```
root# apt-get install build-essential
```

Install Ruby and RubyGems

By default, Debian and Ubuntu have five package repositories called *main*, *restricted*, *universe*, *multiverse*, and *commercial*. For the setup in this chapter, you will need the universe package repository. By default, it is not enabled. Fix that by editing the `/etc/apt/sources.list` file, and uncomment the following two lines:

```
deb http://us.archive.ubuntu.com/ubuntu/ gutsy universe
deb-src http://us.archive.ubuntu.com/ubuntu/ gutsy universe
```

Now, update your `apt-sources` file, and install Ruby and friends. You should have at least Ruby 1.8.6 and Rails 1.2.x or 2.0.x.

```
root# apt-get update
root# apt-get upgrade
root# apt-get install ruby ri rdoc irb ri1.8 ruby1.8-dev libzlib-ruby zlib1g
...
root# ruby -v
ruby 1.8.4 (2005-12-24) [i486-linux]
```

Ruby is live. If you want to verify that fact, run `irb`, and type a few commands, but for now, I'll press onward. Install RubyGems. You really don't want to install Rails without it. Ubuntu and Debian do not officially package RubyGems, so you will need to build it from source. Go to RubyForge,⁴ download the latest stable version, and then build and install it like this:

```
root# wget https://rubyforge.org/frs/download.php/29548/rubygems-1.0.1.tgz
...
root# tar xvzf rubygems-1.0.1.tgz
...
root# cd rubygems-1.0.1/
root# ruby setup.rb
---> bin
<--- bin
...
Successfully built RubyGem
Name: sources
Version: 0.0.1
File: sources-0.0.1.gem
Removing old RubyGems RDoc and ri...
Installing rubygems-1.0.1 ri...
Installing rubygems-1.0.1 rdoc...
```

```
As of RubyGems 0.8.0, library stubs are no longer needed.
Searching $LOAD_PATH for stubs to optionally delete (may take a while)...
...done.
No library stubs found.
```

4. <http://rubyforge.org/projects/rubygems/>

Building the Latest Ruby from Source

Ubuntu and Debian releases often do some strange things with Ruby. A given release may break Ruby up into tiny pieces or install some earlier release of Ruby. If you want Ruby-1.8.6, you will need to build from source.

The first step is getting the latest stable release of Ruby. In your web browser, go to the Ruby home,* and download the desired release. I'm going to install Ruby-1.8.6.

```
ezra$ wget ftp://ftp.ruby-lang.org/pub/ruby/1.8/ruby-1.8.6.tar.gz
```

Now, unpack, build, and install Ruby:

```
ezra$ tar -xvfz ruby-1.8.6.tar.gz
...
ezra$ cd ruby-1.8.6
ezra$ ./configure && make && sudo make install
...
```

You will need to make sure your \$PATH has /usr/local/bin in it:

```
ezra$ echo $PATH
/usr/local/sbin:/usr/local/bin:/usr/sbin:/usr/bin:/sbin:/bin
```

If you don't have /usr/local/sbin:/usr/local/bin in your \$PATH, then you will need to add it. Open /etc/profile with your editor, and add the following line:

```
export PATH=/usr/local/sbin:/usr/local/bin:$PATH
```

Those are the basic steps required to build Ruby from source. Please note that if you choose to build your own Ruby, it will not work with the Ruby packages in Ubuntu. You will have to install the mysql and rmagick gems through Ruby Gems and not through apt-get.

*, <http://www.ruby-lang.org/en/>

Remember to clean up after yourself. Delete the RubyGems source files:

```
root# cd ..
root# rm -rf rubygems-1.0.1*
```

Now you are ready to move into some more familiar territory. You have already installed Rails on your development machine, and now you will do the same thing for your production setup. The component version numbers will probably be higher by the time you read this, but the following command will install the latest stable version of Rails. The include-dependencies option will make sure you have all necessary dependencies:

```
root# sudo gem install rails --no-rdoc --no-ri
Successfully installed rake-0.8.1
Successfully installed activsupport-2.0.2
Successfully installed activerecord-2.0.2
Successfully installed actionpack-2.0.2
Successfully installed actionmailer-2.0.2
Successfully installed activereource-2.0.2
Successfully installed rails-2.0.2
```

Usually, your server-side installation won't need the documentation, so the `--no-rdoc --no-ri` flags will skip them and keep your installation lean.

Mongrel is next. If you have suffered through building and installing Apache, you'll really appreciate the following command:

```
root# gem install mongrel mongrel_cluster ↵
--include-dependencies --no-rdoc --no-ri
  Select which gem to install for your platform (i486-linux)
    1. mongrel 1.0.1 (ruby)
    2. mongrel 1.0.1 (mswin32)
    3. mongrel 1.0 (mswin32)
    4. mongrel 1.0 (ruby)
    5. Skip this gem
    6. Cancel installation
  ...
```

When multiple versions of a gem are available, RubyGems will prompt you for the version and platform you want. I'm on Ubuntu, so choosing 1 gives me the latest compatible version. Most of the time, Mongrel is enough. If I need more performance, I put a proxy in front of Mongrel to serve static content. I'll talk more about that in Chapter 7, *Scaling Out*, on page 144. But now, it's on to the database.

Install MySQL

Next, you will install MySQL and the MySQL-Ruby bindings. You don't have to use MySQL—several available database engines work quite well

with Rails. PostgreSQL is another popular choice. You will also install the `zlib1g-dev` package because it is a requirement for RubyGems and a few other things you will need along the way:

```
root# apt-get install mysql-server-5.0 mysql-client-5.0 ←
      libmysqlclient15-dev libmysqlclient15off zlib1g-dev ←
      libmysql-ruby1.8
```

You've installed the database server, but don't forget to set the root password:

```
root# mysqladmin -u root password <your password here>
```

You can easily verify that the MySQL-Ruby bindings work correctly with a simple `require` command in `irb`:

```
root# irb
irb(main):001:0> require 'rubygems'
=> true
irb(main):001:0> require 'mysql'
=> true
irb(main):002:0> exit
```

This `require` command tells Ruby to load the `mysql` library that provides basic Ruby support for MySQL. Since Rails uses the same bindings, if the `require` returns `true`, Rails will probably work too.

So far, you've installed Ruby, Ruby on Rails, RubyGems, Mongrel, and MySQL. I'm going to walk you through installing `nginx` and `FastCGI` as well. You'll need `nginx` if you want to use `nginx` for load balancing and static content. `FastCGI` is a good alternative to `Mongrel`, should you ever need an alternative. If you want, you can skip these steps and pick them up later.

Install `nginx` and `FastCGI`

This book will concentrate on clustering with `Mongrel` and `Mongrel` cluster. If you want to use `FastCGI` instead, you can install it now. Install `libfcgi-dev` and `libfcgi-ruby1.8` like this:

```
root# apt-get install libfcgi-ruby1.8 libfcgi-dev
```

To check that `fcgi-ruby` works, make sure neither installation returns any errors. You want to be sure you successfully installed the C extension version of `ruby-fcgi` and not just the pure-Ruby version. The C extension is much faster than the pure-Ruby version.

Just as you did with MySQL, you'll use a `require` statement to make sure you have the right libraries installed:

```
root# irb
irb(main):001:0> require 'fcgi.so'
=> true
irb(main):002:0> require 'fcgi'
=> true
irb(main):003:0> exit
```

If both `requires` returned `true`, you're ready to proceed. You need the Perl Compatible Regular Expression Library (or `libpcre`) for the `rewrite` module in `nginx` to work properly. You also need the OpenSSL library and development package for SSL support in `nginx`:

```
root# apt-get install libpcre3-dev libpcre3 openssl libssl-dev
```

Now, the bad news: `nginx` does not have the latest Ubuntu package at this time, so you'll have to build it from scratch. Get the latest release⁵ (`nginx` 0.5.33 at the time of this writing), and build it like so:

```
root# wget http://sysoev.ru/nginx/nginx-0.5.33.tar.gz
...
root# tar xzvf nginx-0.5.33.tar.gz
...
root# cd nginx-0.5.33
root# ./configure --with-http_ssl_module
...
root# make
...
root# make install
...
```

That's it for `nginx`. As always, clean up after yourself and add `nginx` to the `$PATH`:

```
root# cd ..
root# rm -rf nginx-0.5.33*
```

The default `nginx` installation directory is `/usr/local/nginx`, so you need to add `/usr/local/nginx/sbin` to the `$PATH`. Open `/etc/profile` with your editor, and add the following line:

```
export PATH=/usr/local/nginx/sbin:$PATH
```

Check that `nginx` is working and in your `$PATH`. The `version` command option should do the trick:

```
root# nginx -v
nginx version: nginx/0.5.33
```

5. <http://www.nginx.net/>

Install ImageMagick and RMagick

You've installed a pretty good stack. Many Rails applications will also need ImageMagick and RMagick to process image upload and manipulation. This set of libraries gives everyone a little trouble, so pay close attention:

```
root# apt-get install imagemagick librmagick-ruby1.8 ↵
      libfreetype6-dev xml-core
```

Check to see that RMagick works. Put an arbitrary image file called test.jpg in your current working directory for a test, and run the following command:

```
root# irb
irb(main):001:0> require 'RMagick'
=> true
irb(main):002:0> include Magick
=> Object
irb(main):003:0> img = ImageList.new "test.jpg"
=> [test.jpg JPEG 10x11 DirectClass 8-bit 391b]
scene=0
irb(main):004:0> img.write "test.png"
=> [test.jpg=>test.png JPEG 10x11 DirectClass 8-bit]
scene=0
irb(main):005:0>
```

RMagick should now work fine, but it is notorious for being hard to install. If you run into any issues getting RMagick working, you can look at the Install FAQ on the website.⁶

Installing Subversion

To get things ready for Capistrano, you'll need to install Subversion. Let's install it now:

```
root# apt-get install subversion subversion-tools
```

When you install subversion-tools, it will pull in the exim SMTP server as a dependency. Configuring your mail server is beyond the scope of this book, but during the install you will be prompted to choose the general type of mail configuration you want. Choose the option that says "internet site; mail is sent and received directly using SMTP."

You will need to create new Subversion repositories that you can reach from your development machine. If you don't have Apache installed, the best way to run Subversion over the network is with svnserve or

6. <http://rmagick.rubyforge.org/install-faq.html>

over Subversion and SSH. See the Chapter 2, *Refining Applications for Production*, on page 20 for instructions on setting up and using Subversion for your Rails projects.

Test It!

Now you should be in great shape for Rails deployment. Generate a skeleton Rails app, and fire it up with Mongrel to make sure everything is working fine. Switch to your normal user now because you don't need root for Rails development:

```
root# su yourusername
ezra$ cd ~
ezra$ rails test
```

Take it for a test-drive:

```
ezra$ cd test
ezra$ ruby script/server
=> Booting Mongrel (use 'script/server webrick' to force WEBrick)
=> Rails application starting on http://0.0.0.0:3000
=> Call with -d to detach
=> Ctrl-C to shutdown server
** Starting Mongrel listening at 0.0.0.0:3000
** Starting Rails with development environment...
** Rails loaded.
** Loading any Rails specific GemPlugins
** Signals ready.  TERM => stop.  USR2 => restart.  INT => stop (no restart).
** Rails signals registered.  HUP => reload (without restart).
**   It might not work well.
** Mongrel available at 0.0.0.0:3000
** Use CTRL-C to stop.
```

The script/server command will start Mongrel instead of WEBrick. If the server starts OK, point your browser at <http://tracklayer:3000>. Remember to replace tracklayer with the IP or domain of your server.

You should see the “Congratulations, you’ve put Ruby on Rails!” page, so we are done with the basics for our sweet Rails server stack! You’re the captain of your own ship now.

4.5 Conclusion

Running your own Rails server is a rewarding experience. With this basic stack in place, you can start to build your empire and tweak it to your every desire. With nginx and Mongrel installed, you have many configuration options to try on your new server.

Now that the basic building blocks are in place, you're ready to use the techniques you'll find in the rest of this book to make your deployment scale—and make it screaming fast.

In this chapter, you've walked through building your basic installation. You have the components to run Ruby via Mongrel or another web server. In the chapters that follow, you'll put each of those components through their paces. You'll start by building some scripts to repeatedly and reliably deploy your applications. If you're excited and ready to move in to this new home, read on. Moving in with Capistrano is next.

Chapter 5

Capistrano

If you've ever rented an apartment or bought a house, you know that the financial transaction is only the first tiny step. Moving in comes next, and the process can be, well, overwhelming. In the previous chapters, you used FTP, SFTP, or Subversion to install your application onto the shared host. You simply found the files you needed to copy, and you used Subversion or FTP to push the whole Rails project directory up to your sever, wholesale. But this limited approach presents several important problems:

- *It's not scalable.* Once you move beyond a single server, your deployment will get much more complicated.
- *You need to schedule downtime.* While you're copying your application, the app is in an inconsistent state, with some of the files from your old application and some from the new.
- *If something goes wrong, it's hard to backtrack.* You would need to put the old version of your application back. Doing so means more manual work or more guesswork.
- *For FTP, you need to handle source control manually.* Unless you're living in the dark ages, you're keeping your code base in a source control system. Most Rails developers use Subversion.¹
- *The deployment process is not automated.* You have to do it by hand, which leaves room for error. Laziness may be one of the programmer's greatest virtues, but it doesn't make for perfect execution when many steps are involved.

1. If you're not using some form of source control, put this book down and run, don't walk, to pick up *Pragmatic Version Control* [Mas05]. Running without version control these days is madness.

You might decide to use an existing tool, such as `rsync`. The `rsync` open source utility provides fast, incremental file transfer, meaning it copies only those files that change between one invocation and the next.

This method works a little better than plain old FTP because you don't move all the files at once, but it still has most of the same problems. `rsync` is usually faster than plain FTP, works better with multiple servers, and works without any additional modifications to your server's configuration. If you are in a situation where you have little control over the rest of the server, this might be an acceptable solution. But as a programmer who aspires to do great things, you want more than just the *acceptable* solution, don't you?

5.1 The Lay of the Land

So far, you have an application that's ready for deployment and served from a common repository and a host. To move in with style, you need some software to manage your move. That's Capistrano. As you see in Figure 5.1, on the next page, the Capistrano tool sits on the developer's client. Think of Capistrano as the moving company that orchestrates your move to make sure your application makes it to the server in an orderly and repeatable manner. You just call them up from any phone, give the command, and they do the work. Capistrano works the same way. You can direct any deployment from the comfort of your development client, without needing to log onto the deployment servers at all.

For the same reason the company wrote Rails, 37signals created Capistrano to solve actual business problems. As its Rails deployments became more regular and more complex, the growing company needed an automated solution to handle complex application deployments. This typically entailed deploying code updates to at least two web servers and one database server. Any solution would need to do at least the following:

- Securely update multiple web and database servers from a central source code control repository.
- Be sensitive to errors, and roll back any changes if necessary.
- Work with the Rails file layout and allow logging to happen without interruption.
- Operate quickly and reduce the need for downtime.
- Work well with Ruby on Rails.

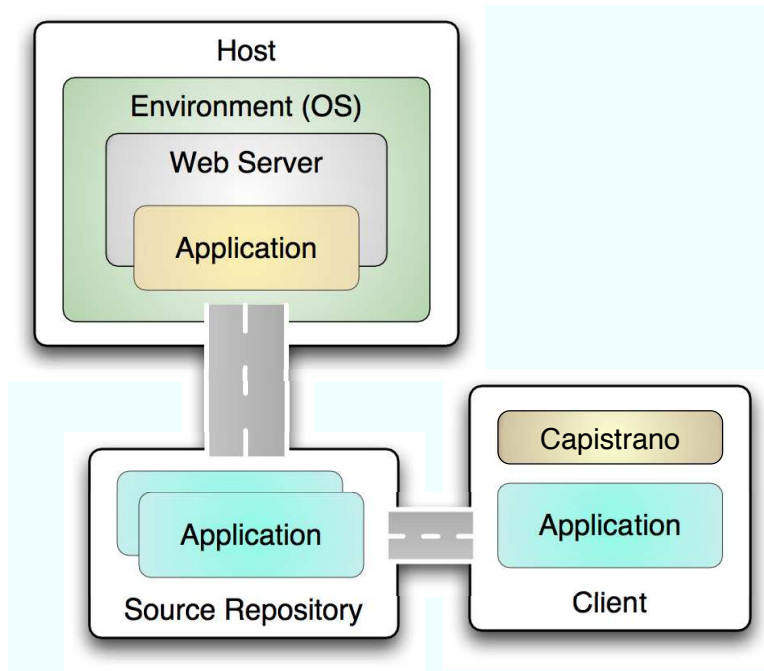


Figure 5.1: Capistrano map

In the early stages of Rails development, Jamis Buck wrote an application named Capistrano to solve this problem. Like Rails, Capistrano is opinionated software and assumes that you do the following:

- Deploy to a dedicated server.
- Use a Unix-like operating system and file system on the server.
- Have SSH access to that server.
- Use Subversion or some other form of source code control.
- Have the ability to run commands as root with the `sudo` command.
- Deploy to a web server, an application server, and a database server (on one or more machines).

Fortunately, you can still configure Capistrano if these assumptions don't hold in your particular situation. Shared hosting is such a situation, and I will show you how to set up a rock-solid recipe for Capistrano later in this chapter.

5.2 How It Works

You will need to install the Capistrano gem and its dependencies. The recipes in this chapter use Capistrano 2.0, so install it now. Remember, `local$` is the prompt on your local development machine, and `ezra#` is the prompt on your development server:

```
local$ sudo gem install capistrano
```

Always keep in mind that Capistrano runs on your local machine. It uses `Net::SSH` and `Net::SFTP` to connect to your remote servers and run shell commands on them. This means you do not need to install Capistrano on your remote servers, only on the machines you want to use to trigger a deploy.

Once you've configured Capistrano with a few variables, called a *recipe*, you can deploy with the following simple command (some initial setup is required, which I'll cover next):

```
local$ cap deploy
```

This unassuming command does everything you need to reliably deploy your application. Rather than tell you what's happening in English, you can just look at the Ruby deploy task:

```
task :deploy do
  transaction do
    update_code
    symlink
  end

  restart
end
```

That's a pretty simple block of Ruby code. Capistrano uses a Rake-like syntax for defining tasks that will execute on the server. Each task has a name, followed by a code block. This task, named `deploy`, does the following:

1. Before either of these lines is executed, Capistrano connects to your server via SSH.
2. The code begins a transaction. That means that all the code will happen in the scope of a transaction. If any part of the transaction fails, the whole transaction will fail, triggering a rollback. I'll cover rollbacks later in this chapter.

3. The first step in the transaction, `update_code`, does a Subversion checkout to load a full copy of your Rails application into a dated release directory on the remote server. For example, a `cap deploy` might create a directory called `releases/20070416190111`. The number 20070416190111 is actually a time stamp for 7:01:11 p.m. on April 16, 2007.
4. The next step in the transaction, `symlink`, links the log directory for your Rails application to a shared log directory. `symlink` then links your application's folder to the current directory so the web server can find it.
5. The task finally restarts any active Mongrel or FastCGI processes.

Each of these steps is a critical component to a secure, successful deployment. Using Subversion ensures that Capistrano will always get the right code base. SSH provides the necessary security so your files cannot be compromised in transit, and the symlinks force an instantaneous conversion. The symbolic link also lets you revert to an older version of the code if your code is bad or Capistrano encounters an error. Finally, Capistrano restarts any active Mongrels or FastCGI processes, and the new code goes live.

The Capistrano deploy task is certainly better than `rsync`, but the automation comes at a cost. You'll need to do a little more setup, but not too much. Before I walk you through the gory details, let's take a look at Capistrano's file organization.

Capistrano's File Organization

37signals built Capistrano specifically to deploy Rails applications, but you can configure it to work with other types of applications too. The default recipe assumes you have a log directory for log files and a public directory for the web server's public files.

Every time you deploy, Capistrano creates a new folder named with the current date and then checks out your entire Rails app into that folder. Next, it wires the whole thing together with several symbolic links. The directory structure is shown in Figure 5.2, on the following page. Notice the current directory doesn't have the physical file structure underneath it. `current` directory is only a link into a specific dated folder in the `releases` directory. The result is that `current` will always hold the current active version of your application. For your convenience, Capistrano also creates a `public/system` folder and links it to the `shared/system` directory, helping you retain cache files or uploads between deployments.

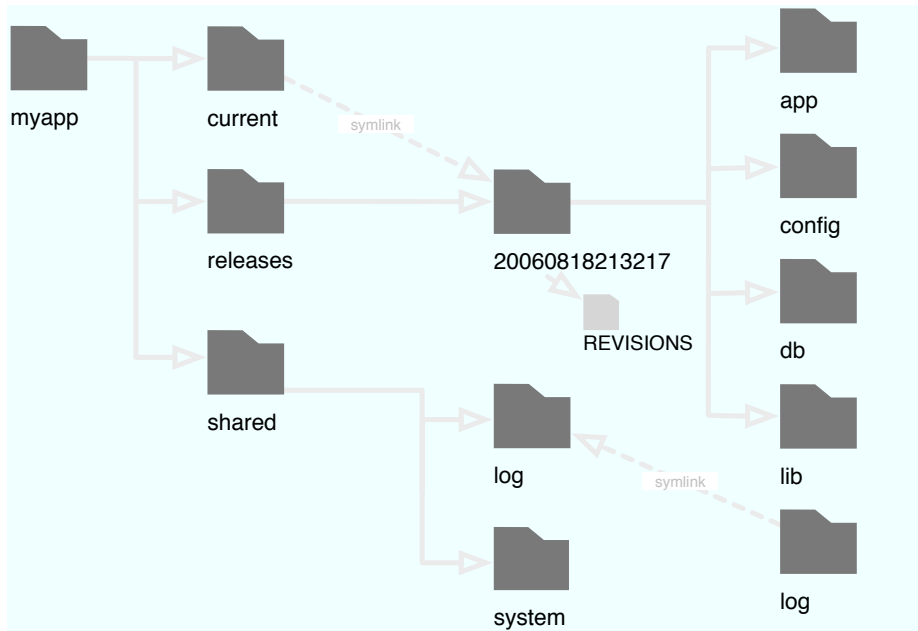


Figure 5.2: The current directory with symbolic links to releases

5.3 Local and Remote Setup for Rails

Capistrano configuration isn't too difficult, but you will need to do a few steps on both your development machine and the remote server. I'll list the steps and then go through each in detail. First, on your local machine you'll need to do the following:

1. Install the Capistrano gem.
2. Tell Capistrano about your application so it can add the necessary files to it.
3. Customize `config/deploy.rb` with your server's information.
4. Import your application into Subversion.

Those local changes prepare your development machine to deploy your code base from Subversion. Next, you'll need to make the following changes on your server:

1. Set your web server's document root to `current/public`.
2. Do a checkout of your app so Subversion will cache your login information.

Practice with a Blank Rails Project

If you are using Capistrano for the first time, it might help to make a blank Rails project and practice a simple deployment on your server. You don't need to write any code or even create a database. Just use a new project with the default index.html page that is generated by Rails. To create the default project, just type rails projectname.

When you've completed these steps, you can run the cap deploy:setup and cap deploy tasks. Next, I'll show you each independent step in more detail.

Install the Capistrano Gem

You need to install Capistrano only on your development machine, not the server, because Capistrano runs commands on the server with a regular SSH session. If you've installed Rails, you probably already have RubyGems on your system. To install Capistrano, issue this command on your local machine:

```
local$ sudo gem install capistrano
```

```
Attempting local installation of 'capistrano'
Local gem file not found: capistrano*.gem
Attempting remote installation of 'capistrano'
Successfully installed capistrano-2.0.0
Successfully installed net-ssh-1.1.1
Successfully installed net-sftp-1.1.0
Installing ri documentation for net-ssh-1.1.1...
Installing ri documentation for net-sftp-1.1.0...
Installing RDoc documentation for net-ssh-1.1.1...
Installing RDoc documentation for net-sftp-1.1.0...
```

While you are installing gems, install the termios gem as well. (Sorry, termios is not readily available for Windows.) By default, Capistrano echoes your password to the screen when you deploy. Installing the termios gem keeps your password hidden from wandering eyes.

Reinstalling Ruby on Mac OS X

Capistrano relies heavily on Ruby's ability to communicate over SSH, which does not work properly with the default Ruby interpreter included with Mac OS X for versions before Leopard. The C bindings do not always work correctly. (Leopard includes Capistrano, Ruby version 1.8.6, and Mongrel.) If you have one of these versions of OS X, you can fix this problem in a couple of ways:

- Install the MacPorts package management system, and let it install Ruby for you. You can download MacPorts* and then run this command:

```
local$ sudo port install ruby
```

- Install Ruby from source. Dan Benjamin has step-by-step instructions.[†] You can find a shell script that automates an installation of Ruby using Dan's instructions online.[‡]

*. <http://macports.org/>

†. <http://hivelogic.com/narrative/articles/ruby-rails-mongrel-mysql-osx>

‡. <http://nubyonrails.com/pages/install>

To install termios, type the following:

```
local$ sudo gem install termios
```

```
Attempting local installation of 'termios'
Local gem file not found: termios*.gem
Attempting remote installation of 'termios'
Building native extensions. This could take a while...
ruby extconf.rb install termios
checking for termios.h... yes
checking for unistd.h... yes
...
Successfully installed termios-0.9.4
```

Generate an Application Deployment File

A deployment file brings together all the Ruby scripts and configuration parameters that Capistrano needs to deploy your application. Just as the Rails script/generate command generates some default application code that you later modify, Capistrano has a special flag to copy a few Rake tasks and a sample deployment file to the proper locations inside your Rails application.

Generate your deployment file now by typing the following command:

```
local$ cd my_rails_app
local$ capify .
[add] writing `./Capfile'
[add] writing `./config/deploy.rb'
[done] capified!
```

Let's break down what just happened.

capify is the Capistrano script. The dot tells it to install in the current directory. Alternatively, you can provide the full or relative path to your Rails app. The command creates a config/deploy.rb file, which contains the deployment hosts, and Capfile, which tells Capistrano to load its default deploy recipes and where to look for your deploy.rb when you run cap deploy from inside your Rails application.

Customize config/deploy.rb

Here is a first glance at the default deploy.rb recipe file that the capify created for you:

```
set :application, "set your application name here"
set :repository, "set your repository location here"

# If you aren't deploying to /u/apps/#{application} on the target
# servers (which is the default), you can specify the actual location
# via the :deploy_to variable:
# set :deploy_to, "/var/www/#{application}"

# If you aren't using Subversion to manage your source code, specify
# your SCM below:
# set :scm, :subversion

role :app, "your app-server here"
role :web, "your web-server here"
role :db, "your db-server here", :primary => true
```

There's no rocket science in deploy.rb. The :application symbol defines the deployment target application's name. The :repository symbol defines the Subversion repository for the application. The next three roles then define the machines that serve as the web, application, and database servers for your application. Most applications will need to set a few variables depending on the installed location of the application, the user deploying the app, and the web servers involved.

Here is a slightly more customized `deploy.rb` file:

```
# Customized deploy.rb
set :application, "brainspl.at"
set :repository, "http://brainspl.at/svn/#{application}"
set :scm_username, 'ezra'
set :scm_password, proc{Capistrano::CLI.password_prompt('SVN pass:')}
role :web, "web1.brainspl.at", "web2.brainspl.at"
role :app, "app1.brainspl.at", "app2.brainspl.at"
role :db, "db.brainspl.at", :primary => true

set :user, "ezra"
set :deploy_to, "/home/#{user}/#{application}"

set :deploy_via, :export
```

The most obvious differences in the default file and the customized file are the roles and the few lines below that. Roles are groupings of machines that handle different tasks for your application. The key roles are the web server (Apache), application server (Mongrel), and database server (MySQL). Now, look at the next few lines below the roles.

Capistrano lets you customize many different elements related to your servers, your application, authentication, and Subversion. The previous script customizes the deployment directory, the system user, the `:scm_username` command, the `:scm_password` command, and the command used to access Subversion.

In Capistrano 2.0, Subversion is the default SCM module. The user and password used to connect to your Subversion repository are defined as `:scm_username` and `:scm_password`. If you use a different source code repository, then you can set the `:scm` variable in your deploy recipe. For example, if you use Darcs instead of Subversion, it would look like this:

```
set :scm_username, 'ezra'
set :scm_password, proc{Capistrano::CLI.password_prompt('Darcs pass:')}
set :scm, 'darcs'
```

You will notice that we have something different going on for the `:scm_password` variable. Since we don't want to hard-code the password in our deploy recipe, we have asked Capistrano to prompt us for the password every time we run a deploy.

If you're running a shared host, you can't run with root access, so you'll need to handle restarts a little differently.

Setup Apache or lighttpd to Use the Maintenance Page

The `deploy:web:enable` task assumes your server will serve the `public/system/maintenance.html` page instead of the real site, if the maintenance page exists. Add the following Rewrite directive to your Apache config or your local `.htaccess` in order to make `deploy:web:disable` work correctly:

```
RewriteCond %{DOCUMENT_ROOT}/system/maintenance.html -f
RewriteCond %{SCRIPT_FILENAME} !maintenance.html
RewriteRule ^.*$ /system/maintenance.html [L]
```

This rewrite rule says that if there is a file called `%{DOCUMENT_ROOT}/system/maintenance.html`, rewrite all requests to `/system/maintenance.html`. With that rewrite rule in place, if the maintenance page exists, the web server will deliver it to satisfy any requests to this application regardless of what URL they requested.

In the following code, I use a script called the reaper that does the trick:

```
set :use_sudo, false
set :run_method, :run

namespace(:deploy) do
  desc "Restart with shared-host reaper"
  task :restart do
    run "#{current_path}/script/process/reaper --dispatcher=dispatch.fcgi"
  end
end
```

Notice that the `:restart` is defined inside the `namespace(:deploy)` block. Capistrano 2 has an organization concept of namespaces. Namespaces let you collect related concepts into a central grouping of names. The `method namespace` takes a single parameter, defining the namespace, and a code block. All of the Capistrano tasks in the code block will be part of that namespace. In this case, I'm adding the `:restart` task to the default namespace. I'll create all the deploy-related tasks inside that namespace. To call this restart task in the deploy namespace, you need to specify the namespace, like this:

```
local$ cap deploy:restart
```

Import Your App into Subversion

In Chapter 5, *Capistrano*, on page 92, you learned how to place your code under source control, if you were not already doing so. Capistrano works with several source code control systems, but Subversion is the most common. Many shared hosts offer Subversion hosting, or you can install the Subversion server on your own dedicated or VPS server (see Chapter 4, *Virtual and Dedicated Hosts*, on page 72).

You will save configuration time by creating a repository named for your deployment domain. For example, the `brainspl.at` repository stores the Rails app that powers the `Brainspl.at` site.² To import the project for the very first time, issue the following command:

```
ezra$ svn import brainspl.at http://brainspl.at/svn/brainspl.at
```

`brainspl.at` is the local directory containing the application. The source control server is `brainspl.at`. The repository on the server is also named `brainspl.at`.

After importing a project for the first time, you must check out a new copy. The new copy will have all the extra files Capistrano needs to keep everything synchronized. To edit the code for development, you can issue this command:

```
local$ svn checkout http://brainspl.at/svn/brainspl.at
```

To prevent confusion, it's a good idea to use a separate password for checking out code on your server instead of the one you use for your local workstation. From this point, you can make changes to the source and synchronize it with the server by issuing the `svn commit` command:

```
local$ svn commit --message "Bugs have been fixed!"
```

Setting Your Public Document Root

The document root is a directory your shared host uses to serve all your static web pages. Rails will manage all the dynamic content. The local host uses a web server such as Apache to serve your static content—images, HTML pages, JavaScripts, and style sheets. In Rails, the public directory holds all static content. Since the current directory points to your Rails application, you need to set your document root to `current/public`. Just how you do so will depend on whether you have a shared or dedicated host and on the web server you're using. Your hosting provider will tell you how to set that document root appropriately.

2. <http://brainspl.at>

Cache Your Password on the Remote Server

Subversion clients cache login credentials for convenience and performance. But remember, Capistrano runs commands in a shell on the server, not your local host. To make things work smoothly, you need to log in to Subversion at least once from the remote server so the remote server's Subversion client caches your username and password. When you deploy, the server will use the cached information to do checkouts from the repository. An easy way to invoke Subversion is to request a listing from your repository from any directory on the remote server, like so:

```
ezra$ svn list http://brainspl.at/svn/brainspl.at
Password: *****
Rakefile
app/
config/
db/
doc/
lib/
log/
public/
script/
test/
vendor/
```

After you type the command, Subversion will prompt you for your password and then show a list of the folders in the repository. More important, the remote server will be able to cache your username and password for subsequent Capistrano commands.

Run the setup and deploy Tasks

You are nearly done! Capistrano needs to create a few directories on the remote server for organization, so run the setup task:

```
local$ cap deploy:setup
* executing `deploy:setup'
* executing "umask 02 && mkdir -p /home/ezra/brainspl.at/releases
/home/ezra/brainspl.at/shared /home/ezra/brainspl.at/shared/system
/home/ezra/brainspl.at/shared/log /home/ezra/brainspl.at/shared/pids"

servers: ["brainspl.at"]
Password: *****
[brainspl.at] executing command
command finished
```

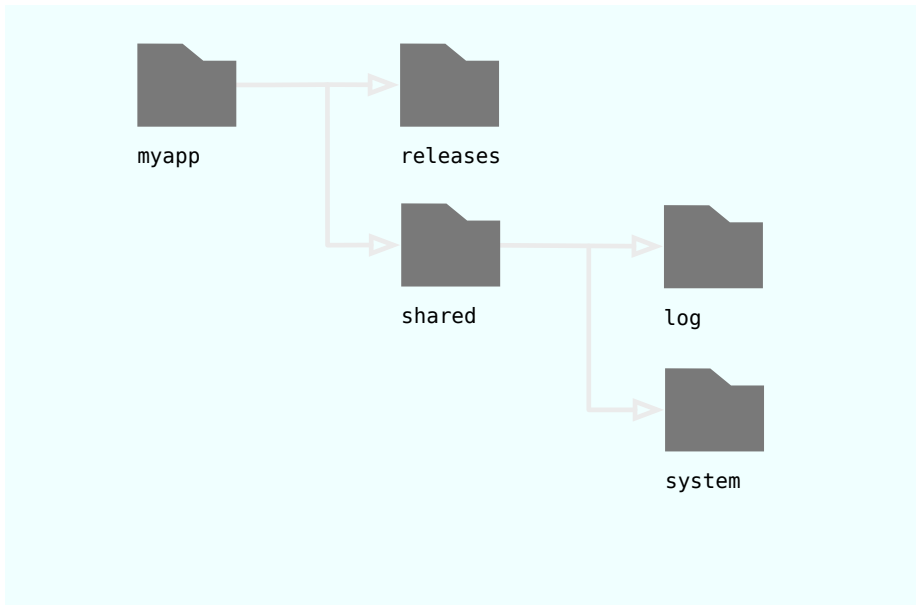



Figure 5.3: Directory layout on the server after setup

setup creates the releases and shared directories on the remote server as in Figure 5.3. No current directory exists yet since you’ve not yet deployed. You’re finally ready to remedy that. Run the deploy task for the first time:

```
local$ cap deploy
```

If you have a standard setup, you should have a running application, but you should be aware of a few variations on the plain deploy task. If you’re running FastCGI and no listeners are running now, you may need to run the `deploy:cold` task instead so Capistrano knows to start FastCGI listeners. Also, if your application has new migrations and you haven’t run them yet, you should run `cap deploy:migrations` to populate your database with the initial schema.

If all has gone well, you will be able to see your new site in a web browser. If not, see the troubleshooting sections in Chapter 4, *Virtual and Dedicated Hosts*, on page 72 and Chapter 3, *Shared Hosts*, on page 44.

You've spent a little time getting your deployment right, but you should already be seeing the benefits. You now have a `deploy` command that is also secure, integrated with source control, informative to your users, and completely automated. True, I've shown you only the most basic setup so far, but in the rest of the chapter I'll walk you through a few more scenarios. First, let me lay a little foundation for customization.

Under the Hood

By now you should understand the basics of Capistrano. Before you start to customize it, I should provide a little more detail about how Capistrano executes tasks. Take a look under the hood.

Capistrano Runs Locally

Some developers get a little confused with where and how Capistrano works. In principle, Capistrano is a client-side tool that issues remote commands via SSH. From that point, the commands run within the bash shell just as if you had logged in to the server and typed them manually. So, the remote server doesn't need to know anything about Capistrano, and you don't even need to install the Capistrano gem there, but you do need the bash shell.

Code Synchronization Happens from Subversion

Local changes to your copy of the source don't affect the code on the remote server! Capistrano synchronizes the remote server from the remote repository, so you must commit any code changes that you want deployed.

I just lied a little, but only a little. One piece of code does not come from Subversion: `deploy.rb`. All changes to `deploy.rb` will take effect during deployment whether those changes have been checked in or not. You already know why: that's the script that runs Capistrano, including the code that exports the current version of your app. It's still a good idea to keep your deploy script under source code control with the rest of your project.

Now, you've seen the basic Capistrano deploy script in action, but only in the default configuration with very few customizations. In the sections that follow, I'll show you how to create your own Capistrano tasks and customize your existing tasks to handle more demanding scenarios. First, you'll see some tasks, called *recipes*, that handle some common tasks.

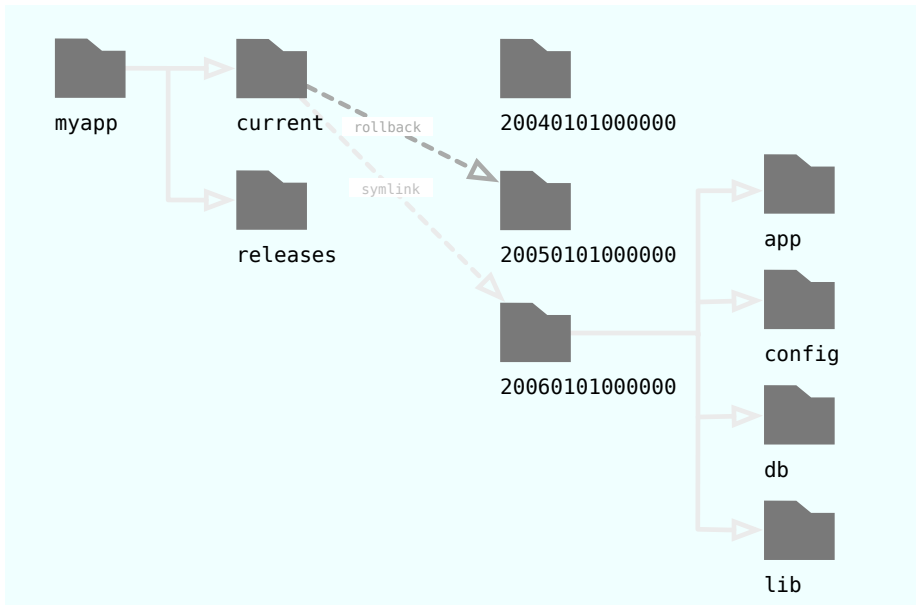


Figure 5.4: The rollback task

5.4 Standard Recipes

Developers across the globe continually enhance Capistrano. To see the name and description of the current built-in tasks, use the `cap -T` command. As an added bonus, `cap -T` shows any of your own custom tasks too, as long as they have a description. From the root of your Rails application, do this:

```
local$ cap -T
```

Here are a few useful tasks:

`cap deploy:migrate` Use the power of the Rails migration system to update your database or manipulate data. This task will migrate the currently deployed code, so use `deploy` first, or use the composite `deploy:migrations` task to keep everything synchronized.

`cap deploy:rollback` Houston, we have a problem! Something went wrong, and you need to revert to the previous version of your code. Running this task activates your previous release. You can run this several times in a row to continue rolling back to older and older versions as shown in Figure 5.4. Remember that this uses

only the versions that you've previously deployed to the server, not older tagged versions from the repository. This task does not touch the database. If older versions of your code require downward migrations, you will have to revert to a previous migration manually.

`cap deploy:cleanup` `deploy:cleanup` deletes older versions from the `releases` folder. By default, `cleanup` leaves the five latest versions, but you can configure this number with the `:keep_releases` variable in your recipe. You could set an `after "deploy", "deploy:cleanup"` callback task to run `deploy:cleanup` automatically, but remember that you won't be able to `deploy:rollback` further than the number of releases currently on the server.

`cap invoke` `COMMAND='uname -a'` Run a single command on the remote server. `invoke` is useful for doing one-time tasks such as executing Rake tasks.

`cap deploy:web:disable` This command copies a file called `public/system/maintenance.html` with messages when your site is down. Using `deploy:web:disable` requires you to first set up your web server to use a static error page if it exists. `deploy:web:disable` simply copies that file to the `public/system` directory, which your web server will show to any clients, thus bypassing the web server when your Rails site is down for maintenance.

`cap deploy:web:enable` The opposite of `deploy:web:disable`, `deploy:web:enable` deletes the temporary maintenance file created by the `deploy:web:disable` task.

When you call the `deploy:web:disable` task, you can pass in two environmental variables, `UNTIL` and `REASON`. Capistrano will render these into the `maintenance.html` page that your web server displayed while your site is down for maintenance. Here is an example call:

```
local$ cap deploy:web:disable UNTIL='4:30pm' ↵
      REASON='We are deploying new features,↵
      please check back shortly.'
```

5.5 Writing Tasks

Capistrano is even more powerful when you start writing your own tasks. Jamis Buck used Ruby's metaprogramming capabilities to write Capistrano. If you've used Rake (written by Ruby's metaprogramming

master, Jim Weirich), you'll understand the general format of a Capistrano task, with a few minor differences that you can find in Section 5.5, *Like Rake, Not Exactly*, on page 117.

Capistrano has many built-in tasks and capabilities that are always evolving. As with Rails itself, it is being developed at a rapid rate, and this chapter has been rewritten several times as new features have been added. Even now, Capistrano developers are discussing plans that would drastically change the internal organization of Capistrano, but the external interface and operation of existing tasks should remain the same. For the most current information on Capistrano's built-in methods and variables, see the online documentation.³

Setting Variables

The standard deploy task uses several user-customized variables in order to find the server, repository, and remote directory in which to deploy an application. If you are writing your own recipes, you can also create variables with the `set()` method:

```
set :food, "chunky bacon"
```

The food variable becomes a local variable for any task, on either side of a standard assignment. I can then use the variable as follows:

```
set :breakfast, "a hot slab of #{food}"

task :serve_breakfast, :roles => :web do
  run <<-CMD
    echo "Are you ready for #{breakfast}?"
  CMD
end
```

This important task prints “Are you ready for a hot slab of chunky bacon?” You can also use the `set()` method with an array, a hash, or any other kind of object. You can even assign the variable to the output of any method, like so:

```
set :projects, ['todo_list', 'lib/payment_library']

desc "Update remote folders from the repository"
task :update_projects do
  projects.each do |project|
    run "svn update /home/ezra/#{project}"
  end
end
```

3. <http://capify.org/>

In the previous code listing, I set the `projects` variable to an array value. I reuse that variable in a task that Capistrano runs on the remote server.

Lazy Evaluation of Variables

Sometimes you want to define a variable that uses other variables that haven't been defined yet. No problem. You can enclose your variable within `{}`, and Capistrano will use lazy evaluation. For example:

```
set(:released_stylesheets_dir) {"#{release_path}/public/stylesheets"}
```

In the previous example, Capistrano will evaluate `#{release_path}` when it uses the string. Lazy evaluation lets you wait to bind a given variable to a value, increasing your flexibility.

Standard Variables and Their Default Values

Capistrano has many different predefined variables. You can set them to configure different tasks in different ways. Capistrano creates them for use with your tasks or within other custom variables that you set. These are some of the predefined variables and their associated uses:

- `:application` has no default. This variable has the name of your application. Other variables such as `deploy_to` use this variable. You will probably want to set this to the domain name of the application you are deploying or to the preferred nickname for your application.
- `:repository` has no default. This variable defines the address of your Subversion repository containing the code you want to deploy.
- `:user` defaults to the currently logged-in user. This variable defines the SSH user Capistrano will use to deploy the application. If your username on your deployment machine is the same as your SSH username, then you can use the default value. This user account will also be used to check out code from the repository and perform `sudo` commands during the deployment process.
- `:deploy_to` defaults to `/u/apps/#{application}`. This variable defines the target deployment directory.
- `:use_sudo` defaults to `true`. Capistrano often needs to run commands under the root user. You can suppress this behavior by setting `use_sudo` to `false`.

- `:run_method` defaults to `:sudo`. Capistrano uses this option to determine whether the `cap deploy:restart` should run under the current user (specify the `:run` value) or root (specify the `:sudo` option).
- `:password` has no default. This parameter defines your password for SSH authentication. If you leave this blank, Capistrano will prompt you for the password when you try to deploy.
- `:deploy_via` defaults to `:co`. This command defines which Subversion command Capistrano should use to check out your application from your repository. Most Rails developers now use `:export` instead in order to avoid displaying `.svn` directory information via the Web.
- `:shared_path`, `:release_path`, and `:current_path` all point to the various directories in your environment, as I've described in this chapter.

Defining Tasks

Now that you've seen a few existing Capistrano variables and tasks, it's time to build your own. Tasks consist of a description, a name, and a list of applicable roles. They are similar to Rake tasks (Section 5.5, *Like Rake, Not Exactly*, on page 117).

Any custom tasks you write that are used during your deployment process should be put in the `:deploy` namespace. For the following tasks, we will assume they are being defined inside the namespace.

Here is a simple task:

```
desc "Delete cached files"
task :sweep_remote_cache, :roles => :web do
  run "cd #{release_path}; rake sweep_cache RAILS_ENV=production"
end
```

The `sweep_remote_cache` command runs the Rake task called `sweep_cache`. The benefit of building a Capistrano task to do this job is that I can run the task from my development machine. Take a look in greater detail:

- `desc` is a short description Capistrano will show when anyone runs the `cap -T` command. This tag is optional, but it's a good idea to use it since your tasks will not show up when you run `cap -T` unless they have a description defined.
- `task` identifies the name of the task.

- `:roles` limits the task to certain groups of servers. The most common roles are `:app`, `:db`, and `:web`. You can define your own roles and subroles should you have the need.

The rest of the script contains more conventional Ruby code. Capistrano provides these methods to make custom task-writing easier:

- `run` and `sudo`: Most tasks will use one of these methods. Each sends shell commands to the remote server, but `sudo` runs the commands as root. See the Capistrano page at the Ruby on Rails site⁴ for more details.
- `put`: This uploads a file to the remote server.
- `delete`: This forcibly deletes a file on the server.
- `on_rollback`: This executes whenever you explicitly issue a `cap deploy:rollback` or when a `cap` command within a transaction fails.

Here is the definition of the `deploy:web:disable` task from Capistrano's default recipes:

```
namespace :web do
  task :disable, :roles => :web, :except => { :no_release => true } do
    require 'erb'
    on_rollback { run "rm #{shared_path}/system/maintenance.html" }

    reason = ENV['REASON']
    deadline = ENV['UNTIL']

    template = File.read(File.join(File.dirname(__FILE__), "templates",
    "maintenance.rhtml"))
    result = ERB.new(template).result(binding)

    put result, "#{shared_path}/system/maintenance.html", :mode => 0644
  end
end
```

This demonstrates the proper use of the `on_rollback` and `put` tasks available to any Capistrano recipe file.

Using the Built-in Callbacks

If you want to add functionality to the standard deployment process to run a Ruby script when you deploy your application, the best way is to use the built-in callback system. For every task, Capistrano looks

4. <http://manuals.rubyonrails.com/read/chapter/104>

Use the cap Shortcut for Custom Tasks

The easiest way to run custom tasks is to use the `cap` command-line tool. Capistrano will automatically discover the `config/deploy.rb` recipe file and will run actions that are passed as arguments. It does this by looking for a `Capfile` in the current working directory that tells it which `deploy.rb` to load.

```
# With cap command and arguments
local$ cap -f config/deploy.rb my_custom_task

# The same command, but even simpler!
local$ cap my_custom_task
```

for a before and after task and calls each one at the appropriate time if it exists. This was how you would write callbacks in Capistrano 1.x. In Capistrano 2, there is a more event-driven callback mechanism with methods called `before()` and `after()`.

I mentioned earlier that the `deploy` task calls three other tasks. This gives you a total of four tasks that you can hook in to. If you write a task named `before_deploy`, Capistrano will execute it in advance of the rest of the deployment process. Similarly, `after_deploy` will run after the deployment task.

Here is a short bit of pseudocode that illustrates how this works:

```
--> before_deploy
deploy do
  --> before_update_code
  update_code
  --> after_update_code
  --> before_symlink
  symlink
  --> after_symlink
  --> before_restart
  restart
  --> after_restart
end
--> after_deploy
```

In addition, Capistrano automatically creates callbacks for each of your own tasks, opening a world of possibilities.

For any task you define, you automatically get a before and after task:

```
task :global_thermonuclear_war do
  ...
end

task :before_global_thermonuclear_war do
  kiss_your_butt_goodbye
end

task :after_global_thermonuclear_war do
  paint_the_house
end
```

At this point, I'm sure your mind is racing with the possibilities. Need to check out code and run the test suite before every deployment? Check. Want to send email to admins after every deployment? Yup. Give yourself a raise in `offer_symlink`? Possible, but not likely. With before and after tasks, you can extend the right task at exactly the right time.

Now, you *can* take things too far. Let your mind wander a little bit, and you'll see what I mean. If `before_deploy` is also a task, you could conceivably write a `before_before_deploy` task. In fact, you can write an action as convoluted as `before_before_after_before_deploy`, which looks like something out of a Monty Python skit. I said you could do it, not that you should do it. In fact, I'd like a deployment without so much before in it!

I hope you never write such a task. Still, imagine with me a little bit longer. A task without any roles will be executed on all servers and all roles, no matter what the parent task is. It seems that `before_wash_dishes` should happen only on the kitchen server if `wash_dishes` was defined as a task that happens on the kitchen server. Not so! You must explicitly specify `:role => :kitchen` for any task that needs to be restricted to the kitchen server:

```
role :kitchen, "kitchen.ezra.com"
role :home_theater, "theater.ezra.com"

# Executed on all servers!
task :before_wash_dishes do
  ...
end

# Executed only on the servers that have the :kitchen role
task :wash_dishes, :roles => :kitchen do
  ...
end
```

```
# Here's the right way to limit this to one group of servers
task :after_wash_dishes, :roles => :kitchen do
  ...
end
```

Having taken that trip down the rabbit hole, it is usually better to refactor your tasks and give them self-documenting names. A `make_dinner` task makes much more sense than a generic `before_wash_dishes` task. Here's the revised code, with a better name:

```
desc "Perform household maintenance."
task :maintain_house, :roles => :estate do
  mow_lawn
  prepare_soap_bucket
  wash_car
  wax_car
  make_dinner
  wash_dishes
end
```

Defining callbacks by making tasks named after your tasks with `before_` or `after_` prepended is still a valid method of using callbacks in Capistrano. But there is also new syntax for defining callbacks that are a bit cleaner. For example:

```
desc "Perform household maintenance."
task :maintain_house, :roles => :estate do
  mow_lawn
  prepare_soap_bucket
  wash_car
  wax_car
  make_dinner
  wash_dishes
end
```

```
before "deploy", "maintain_house"
```

As you can see, this new notation allows you to name your tasks whatever you desire and still be able to hook them to certain events.

Consider a more practical problem. If your `database.yml` file is not under source code control—remember, `database.yml` has your password—you need to use another method to copy it to your server when you deploy. Writing an `after` callback task is a perfect way to solve this problem.

When you run `cap deploy`, Capistrano calls other tasks that you can define without having to override the built-in tasks. To build such a task, you would save the appropriate password information to a file in `shared/config/database.yml`. The `shared` folder is made by Capistrano

when you run the `deploy:setup` task, but you will have to make the config folder manually. If you have a cluster of servers, you will have to do this on each of your servers. The following task shows how. Add it to `deploy.rb`:

```
desc "Symlink the database config file from shared
    directory to current release directory."
task :symlink_database_yaml do
  run "ln -nsf #{shared_path}/config/database.yml
      #{release_path}/config/database.yml"
end

after 'deploy:update_code', 'symlink_database_yaml'
```

Because we did not specify any roles, Capistrano will run the task on all the servers in the cluster (`:app`, `:web`, `:db`, and any others you define). Anytime you deploy, your script will symlink `database.yml` to the config folder in the current release directory. It's just so easy!

Using Roles

By default, Capistrano executes tasks in parallel on all the servers defined with the `role` command. You can limit the scope of a command by explicitly specifying the roles for that task. It is also important to note that Capistrano also runs tasks in parallel, but not concurrently. Imagine three tasks and three servers:

```
role :web, ['one', 'two', 'three']

task :daily do
  wash_dishes
  mow_lawn
  learn_japanese
end
```

The tasks would be executed like this:

```
local$ cap daily
* wash_dishes on server one
* wash_dishes on server two
* wash_dishes on server three

* mow_lawn on server one
* mow_lawn on server two
* mow_lawn on server three

* learn_japanese on server one
* learn_japanese on server two
* learn_japanese on server three
```

Like Rake, Not Exactly

Earlier I told you that Capistrano was almost exactly like Rake. I'm sure you noticed the *almost*. I'll point those differences out now.

Tasks Are Methods

Unlike Rake, other tasks can call Capistrano tasks directly, just as if they were methods. Rake tasks can call other Rake tasks only as tasks, but not as methods. Capistrano uses this feature internally, but you can use it in your tasks, too. For example, here is a simple task:

```
desc "Play a war game"
task :play_global_thermonuclear_war do
  ...
end
```

`play_global_thermonuclear_war` is a Capistrano task, but you can call it from another task like a normal method:

```
desc "Play several games"
task :play_games do
  play_global_thermonuclear_war
  play_11or_dot_nu
end
```

This strategy lets you run a task alone or together with other tasks. For example, you could call a `:rotate_logs` task from a task called `:weekly` or alone.

You Can't List Other Tasks as Dependencies of a Capistrano Task

With Rake, you can pass the name of a task as a hash where the key is the task name and the values are the other tasks that must be run before the current task. Capistrano doesn't use this syntax. Instead, you must call other tasks as methods or write before and after callbacks, as mentioned previously.

You Can Override Capistrano Tasks

Rake lets you define tasks in stages, so it is not possible to override an existing Rake task. Capistrano gives you the ability to override tasks. If you don't like the behavior of a built-in task, you can redefine it. For example, if you are deploying to a shared host, you might need to send a special argument to the reaper script in order to restart your FastCGI processes.

To do this, define your own restart task as if it had never been written:

```
namespace(:deploy) do
  desc "Shared host restart"
  task :restart do
    run "#{current_path}/script/process/reaper --dispatcher=dispatch.fcgi"
  end
end
```

Other built-in tasks such as `deploy` will now use this task instead of the built-in `deploy:restart` task.

Capistrano Tasks Aren't Automatically Available as Rake Tasks

Even though Capistrano tasks look like Rake tasks, they are part of a separate system. Rake doesn't know about Capistrano tasks, even though older versions of Capistrano tried to bridge that gap. The approved way to call Capistrano tasks is with the `cap` command. It will automatically discover recipes in `config/deploy.rb` (depending on the contents of `Capfile`):

```
local$ cap deploy
```

5.6 A Little Extra Flavor

In this section, I'll walk you through the topics that will make your Capistrano experience a little sweeter. You'll sometimes want to see extra output or speed up your checkouts. These extra touches can really improve your overall experience.

Stream

Capistrano has a built-in helper called `stream`. You can use this helper to stream information such as log files and other stats from your remote servers to your local terminal.

You can use a task like this to tail the log files of your server:

```
Download capistrano/recipes/stream.rb

task :tail_log, :roles => :app do
  stream "tail -f #{shared_path}/log/production.log"
end
```

You can also continuously monitor the output of a shell command with Capistrano's streaming callbacks.

For example, to get the output of the rails_stat log parser, you would use something like this:

[Download](#) capistrano/recipes/stream.rb

```
desc "Watch continuous rails_stat output"
task :rails_stat, :roles => [:app] do
  sudo "rails_stat /var/log/production.log" do |channel, stream, data|
    puts data if stream == :out
    if stream == :err
      puts "[Error: #{channel[:host]}] #{data}"
      break
    end
  end
end
end
```

In this task, you can see that the sudo method takes a block with three parameters: channel, stream, and data. The channel is the raw SSH connection, the stream is equal to either :out or :err, and the data is the output from the server.

This produces the following output on my blog:

```
~ 0.4 req/sec, 2.6 queries/sec, 6.7 lines/sec
~ 0.3 req/sec, 1.4 queries/sec, 4.3 lines/sec
~ 0.6 req/sec, 0.6 queries/sec, 4.2 lines/sec
~ 0.5 req/sec, 0.5 queries/sec, 3.5 lines/sec
~ 0.2 req/sec, 0.2 queries/sec, 1.4 lines/sec
```

Run Solo

Capistrano can do any kind of task that can be run over SSH, and it can be used with other technologies such as PHP, Perl, or Python (I've used it to deploy a web app written in Perl). I run my blog off the Typo trunk but use a separate theme that is stored in my own repository. To easily update it on the remote server, I use a custom recipe kept in its own deploy.rb file within the theme directory:

```
set :application, "example.com"
set :user, "ezra"
role :web, application

desc "Update the theme and delete cached CSS files."
task :theme_update, :roles => :web do
  run "svn update #{application}/themes/nuby"
  run "rm #{application}/public/stylesheets/theme/*.css"
end
```

What's happening here? I use Capistrano's built-in capability to connect to a remote server and execute commands. By specifying a `:role` for the task, it knows that it should connect to all the `:web` servers and run the `svn update` and `rm` commands. I also used its ability to set local variables like `:application` to simplify the recipe. I keep the files in a folder with the name of the domain, which makes it simple to specify a path to the theme folder and the cached style sheets.

To deploy, you could call it from the command line like this:

```
local$ cap -f /path/to/deploy.rb theme_update
```

Since `deploy.rb` is in a nonstandard location, use the `-f` argument to specify the location on the file system. Then you need to specify the task to run with `theme_update`. This makes it easy to address deploy recipes anywhere on your computer rather than only those in the standard locations.

Capistrano will prompt you for your password and will execute the actions, showing the output as it happens. It will not do the standard `deploy:update_code`, `deploy:symlink`, and other tasks. Those are only part of the `deploy` task. If you write your own tasks, they will be executed independently.

You could also use Capistrano in a similar fashion to do maintenance tasks built into Rails, including log rotation and session sweeping:

```
desc "A Capistrano task that runs a remote rake task."
task :clear_sessions, :roles => :db do
  run "cd #{release_path}; rake db:sessions:clear RAILS_ENV=production"
end
```

Do a Push Deploy Instead of Pull with a Custom Deployment Strategy

Capistrano is a great system by default. But some people would rather push a tarball of their application code base to the servers rather than let the servers pull the application from Subversion. Luckily, Capistrano 2.0 has different deployment strategy, and it's easy to change the deploy to work via push instead of pull:

```
set :deploy_via, :copy
```

Just changing the `:deploy_via` variable to `:copy` will alter the behavior of your deploy. Now instead of logging in to your servers and doing an `svn export`, Capistrano will now do a local Subversion checkout to a temporary location on your local machine. It will then compress and

create a gzipped tarball of your application. Once it has the tarball, it will upload it to the server and create a new release directory. The rest of the deploy tasks will remain unchanged, and all your symlinks and callbacks will fire like usual. This is extremely useful if you can access your Subversion repository only from inside your office building but not from your servers. Now you can deploy via push to avoid this issue.

5.7 Troubleshooting

Since Capistrano executes remotely on the target server via SSH, debugging can be difficult. These tips can help you troubleshoot your scripts when things go wrong.

The current Directory Can't Exist as an Actual Folder

Capistrano is a tremendously convenient tool, but it's part of your infrastructure. As with Rake or other Rails scripts, you might find debugging Capistrano recipes a little intimidating. Take heart, though. It's all Ruby code.

Shared hosts often give you a directory called `current` as part of the overall setup process. The recipes that I've shown you will create that directory for you. You'll want to delete the host's version.

Migrations Out of Sync with Code Base

Capistrano usually makes it easy to deal with migrations if you follow the precautions I lay out in Chapter 2, *Refining Applications for Production*, on page 20. That chapter laid out what you should do to keep your migrations well behaved. If you've gotten yourself into trouble, keep these tricks up your sleeve to get you back out.

One problem can occur with partially completed migrations. If a migration has a bug in the `up()` or `down()` method, your migration might leave your database in an inconsistent state, or you may be lucky and need only to set the version number correctly. If your version number is wrong, you need to reset it with a SQL query.⁵ You can easily do so in the console or from the Rails script runner. Say Rails crashed in migration 44 before setting the version in the schema information, so your migrations are always crashing on number 43. You can set the version

5. Alternatively, you can use the `transactional_migration` plug-in at http://www.redhillonrails.org/#transactional_migrations.

column of `schema_info` to 44 with this command: `ruby script/runner 'ActiveRecord::Base.connection.execute "update schema_info set version=44"'`.

You may also have a situation where Rails is breaking because the version of code your migration needs is inconsistent with an earlier migration. (If you put your models in your migrations, this problem won't occur.) You can solve the problem by deploying an earlier version by running your migrations (on the server) up to a specific version like this: `rake db:migrate VERSION=42`.

Then, you can simply run `cap deploy:migrations` to deploy your current code base with the rest of your migrations.

Only the Contents of `log` and `public/system` Will Be Kept Between Deployments

Each time you deploy, Capistrano makes a time-stamped release directory. If you have user-generated file uploads that end up in `public`, they will disappear the next time you deploy. This is because Capistrano made a new release directory and symlinked to it. My favorite way to fix this is to make an after `'deploy:update_code'()` hook task to symlink your own folders into `public` from the Capistrano shared directory.

Assume you have a `public/avatars` directory where you store uploaded avatars. You want this directory to persist between deployments and not get overwritten. You need to create an empty `avatars` directory in the Capistrano shared directory and then have it get symlinked into the proper place each time you deploy:

```
after 'deploy:update_code', 'deploy:link_images'
namespace(:deploy) do
  task :link_images do
    run <<-CMD
      cd #{release_path} &&
      ln -nfs #{shared_path}/avatars #{release_path}/public/avatars
    CMD
  end
end
```

User Permissions

The user performing the SSH deployment will own all your files. You need to remember that the web server user must be able to read and write to all of the appropriate files. Most Rails shops use a single deployment ID to deploy. If you must change permissions as part of a Capistrano script, use an after task to change permissions if necessary.

Keep in mind that any cron runner or email-receiving task should also have write access to the appropriate log file.

5.8 Conclusion

In this chapter, you've taken a pretty deep stroll through Capistrano. You can now deploy your application in a repeatable, reliable way. You've also learned to extend Capistrano using recipes or callbacks.

In the chapters to come, I'll shift the focus to your application. You now know the basics for Rails deployments. It's time to read about the finer points. In the next chapter, you will learn to build applications that are friendlier to your production environment. Read on.

Managing Your Mongrels

By now, you've located a good home and moved in. If you've chosen to manage your own deployment and followed the steps in this book, you have a single Mongrel running your application. Things will start happening very quickly now. The next step is to make sure your house is running smoothly and that it is safe. Part of that job will be clustering and configuring Mongrel. Next, you'll want to get a watchdog to help keep an eye on things. In this chapter, you'll learn Mongrel configuration, clustering, and monitoring.

6.1 The Lay of the Land

Clustering Mongrel is the first step to achieving better scalability with Ruby on Rails. You'll find the process amazingly easy to do. First, you'll build a customized configuration file that will let you predictably and reliably restart Mongrel with an automated script. Then, you'll use a Mongrel cluster to launch more than one Mongrel so that your installation can share many simultaneous requests.

After you have a working cluster, you will place that cluster under a monitoring process called Monit. This watchdog process will take action when rogue Mongrel processes take up too much memory, stop responding, or misbehave in other ways. The Mongrel cluster under management from Monit is shown in Figure 6.1, on page 126.

6.2 Training Your Mongrels

You've seen how easy it is to use a Mongrel server in its default configuration. In practice, you're often going to need more flexibility than

the default configuration can provide. You will want to cluster your Mongrels and probably run them as a service. Fortunately, configuring Mongrel and even enabling Mongrel clusters is surprisingly easy. As you recall, to start Mongrel, you want to run the following commands:

```
ezra$ cd /path/to/railsapp
ezra$ mongrel_rails start -d
```

That command starts a Mongrel daemon running in the background on port 3000. It is just as simple to restart or stop the server. You'd use `mongrel_rails restart` to restart and `mongrel_rails stop` to stop. But these commands simply take your dog for a walk. You are ready to teach your dog a few more advanced tricks. You can train your dog with much more control through a variety of command-line options and configuration files.

The `mongrel_rails` command-line tool contains explanations for all its options. To access this embedded documentation, use the `-h` flag:

```
ezra$ mongrel_rails start -h
Usage: mongrel_rails <command> [options]
  -e, --environment ENV      Rails environment to run as
  -d, --daemonize             Whether to run in the background or not
  -p, --port PORT             Which port to bind to
  -a, --address ADDR          Address to bind to
  -l, --log FILE              Where to write log messages
  -P, --pid FILE              Where to write the PID
  -n, --num-procs INT         Number of processors active before clients denied
  -t, --timeout TIME          Timeout all requests after 100th seconds time
  -m, --mime PATH             A YAML file that lists additional MIME types
  -c, --chdir PATH            Change to dir before starting (will be expanded)
  -r, --root PATH             Set the document root (default 'public')
  -B, --debug                 Enable debugging mode
  -C, --config PATH           Use a config file
  -S, --script PATH           Load the given file as an extra config script.
  -G, --generate CONFIG       Generate a config file for -C
      --user USER             User to run as
      --group GROUP           Group to run as
      --prefix PATH           URL prefix for Rails app
  -h, --help                  Show this message
      --version                Show version
```

Keep in mind that this list will doubtlessly change as Mongrel grows and improves. For a detailed explanation of every command-line option, refer to the great online how-to.¹ You can also find excellent documentation at the Mongrel website.²

1. <http://mongrel.rubyforge.org/docs/howto.html>

2. <http://mongrel.rubyforge.org/docs/>

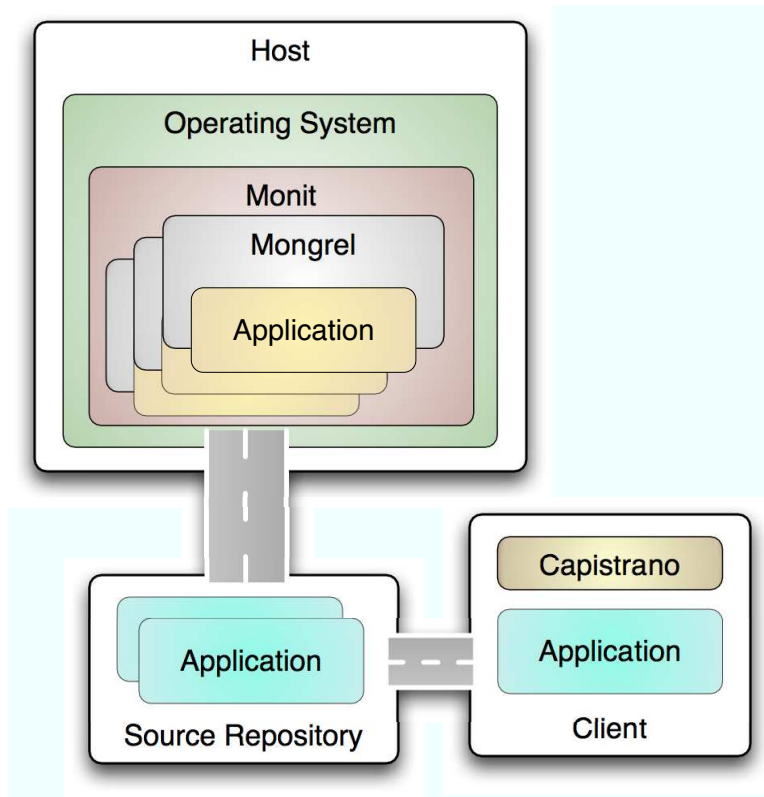


Figure 6.1: Deployment map for scaling out

You can specify all these options on the command line each time you start `mongrel_rails`, but if you need anything more than the most basic configuration, flags will quickly get tedious. This is where the Mongrel configuration file comes into play. The `-G` or `--generate` option will create a config file for a given set of command-line flags. Once you have a command line with all the options you desire, you can save them to disk for later use. From the root of your Rails application, run the following command:

```

ezra$ mongrel_rails start -G config/mongrel_7000.yml ↵
      -e production -p 7000 -d
** Writing config to "config/mongrel_7000.yml".
** Finished. Run "mongrel_rails -C config/mongrel_7000.yml"
** to use the config file.
  
```

The previous command generates a file called `mongrel_7000.yml` in the `config/` directory of your Rails application:

```
ezra$ cat mongrel_7000.yml
---
:config_file:
:daemon: true
:cwd: /Users/ezra/railsapp
:includes:
- mongrel
:environment: production
:log_file: log/mongrel.log
:group:
:config_script:
:pid_file: log/mongrel.pid
:num_processors: 1024
:debug: false
:docroot: public
:user:
:timeout: 0
:mime_map:
:prefix:
:port: "7000"
:host: 0.0.0.0
```

That file has a lot of options. Thankfully, you don't usually need all these settings, so you can trim the file down quite a bit, like so:

```
---
:daemon: true
:cwd: /Users/ezra/railsapp
:environment: production
:log_file: log/mongrel.log
:pid_file: log/mongrel.pid
:docroot: public
:port: "7000"
:host: 0.0.0.0
```

Now you can make changes to your Mongrel configuration without typing them on the command line each time you want to start a Mongrel server. To start Mongrel with your shiny new config file, use the `-C` flag:

```
ezra$ mongrel_rails start -C config/mongrel.yml
```

If you aren't sure what options you want yet but you want to generate a config file to start with, you can use the `-G` option without any other arguments:

```
ezra$ mongrel_rails start -G config/mongrel.yml
```

When you run Mongrel on any Unix-like operating system, you can control it with signals similar to WEBrick or FastCGI.

The signals that Mongrel understands include the following:

TERM	Stops Mongrel and deletes the PID file.
USR2	Restarts Mongrel (new process) and deletes the PID file.
INT	Same as USR2. This command is a convenience because <code>[Ctrl]+C</code> generates an interrupt signal and <code>[Ctrl]+C</code> is used in debug mode.
HUP	Internal reload. This command might not work well because sometimes doing an internal reload will not reload all the code in the system. You are safer if you do a real USR2 restart.

You can send these signals with the `kill` command:

```
ezra$ kill -HUP 27333
```

Configuring a Cluster

You've seen how to configure a single Mongrel instance. Your next step is to build a more flexible configuration for a cluster. First, you need to generate your `mongrel_cluster.yml` file. Let's configure a cluster of three Mongrels by running the following command from the root of your Rails application directory:

```
ezra$ mongrel_rails cluster::configure -p 8000 ↵
      -e production -a 127.0.0.1 -N 3
Writing configuration file to config/mongrel_cluster.yml.
ezra$ cat config/mongrel_cluster.yml
---
port: "8000"
environment: production
address: 127.0.0.1
pid_file: log/mongrel.pid
servers: 3
```

You just built a minimal, but working, `mongrel_cluster.yml` file to run a cluster. The `port` option is a little different from the `port` option you used when you configured a single Mongrel instance. For a cluster, `port` specifies the first port number for your first Mongrel. Each subsequent Mongrel starts on the next port. These Mongrels will start on ports 8000, 8001, and 8002. You also specified the Rails environment for your Rails application. Normally, you'll run a single Mongrel in development mode and a cluster for production. Mongrel will listen on the hostname or IP address specified by the `address` option. The `pid_file` option specifies the location for Mongrel's PID files, and `servers` specifies the number of Mongrels you want in the cluster. The previous file configures three

Mongrels running on ports 8000, 8001, and 8002. Next, customize this config file a bit to take advantage of a few more attributes:

```
---
port: "8080"
cwd: /Users/ezra/railsapp
log_file: log/mongrel.log
environment: production
address: 127.0.0.1
pid_file: log/mongrel.pid
servers: 3
docroot: public
user: ezra
group: ezra
```

It's a good idea to set `cwd` (current working directory) to the root of your Rails application. I also added the `log_file`, `docroot`, `user`, and `group` settings. Configuring the user and group will make Mongrel run under that user and group even if you accidentally start it with `sudo`. It is always a good idea to run web applications as a normal user instead of root, just in case your application has a security breach. We know all applications have security holes.

To start and stop your Mongrel cluster, you still use the `mongrel_rails` command, but you gain a set of cluster commands to use with it. Try it now from the root of your Rails app:

```
ezra$ mongrel_rails cluster::start
Starting 3 Mongrel servers...
ezra$ mongrel_rails cluster::restart
Stopping 3 Mongrel servers...
Starting 3 Mongrel servers...
ezra$ mongrel_rails cluster::stop
Stopping 3 Mongrel servers...
```

You've just tidied up your Mongrel configuration. Next, you can work on running Mongrel as a service.

Running Mongrel as a Service

Using the `mongrel_rails` command from your local directory is fine for playing around on your local machine or for staging environments. But in a production environment, it's nice to configure Mongrel more like Apache and MySQL. The service configuration keeps things consistent. The operating system will include Mongrel when automatically starting services each time your server starts or restarts. The service configuration works much like the Mongrel configuration you've already built.

You'll need to ensure that you have the `mongrel_cluster` gem installed first. Once it is, you simply need to create a file at `/etc/mongrel_cluster/myapp.conf`. I recommend you replace `myapp` with the name of your application, but you can use anything you like. If you're running multiple applications on one server, you can have multiple Mongrel cluster configuration files. In the file, you configure your Mongrel cluster with a few simple options. They are documented with inline comments in the following example configuration file:

```
# /etc/mongrel_cluster/myapp.conf

# The user and group with which to run Mongrel
user: deploy
group: deploy

# The location of our Rails application
# and the environment to run within
cwd: /home/deploy/apps/myapp/current
environment: production

# The number of servers in the cluster
servers: 4

# The starting port
# e.g. with 3 mongrels would bind ports 8000-8002
port: "8000"

# The IP Addresses allowed to connect to Mongrel
# If your web server proxy is separate from your app server,
# put its IP address here instead of the localhost IP address
address: 0.0.0.0

# The location of the process ID files relative to the rails app above
pid_file: log/mongrel.pid
```

With that configuration file in place, you can now start, restart, or stop Mongrel using the following simple command from any current working directory:

- `mongrel_cluster_ctlstart` will start a Mongrel cluster from scratch.
- `mongrel_cluster_ctlrestart` will restart a running Mongrel cluster.
- `mongrel_cluster_ctlstop` will stop a Mongrel cluster.

Now that you have your cluster of Mongrels happily running as a service, you can turn your attention to managing the Mongrel server. The Monit tool will let you handle scenarios where your Mongrels might run out of memory or experience any other problems.

Starting Mongrel Cluster on Boot

You can get your Mongrel cluster to start at boot time, and it should be fairly simple with most Linux distributions. The Mongrel cluster comes with a script ready to go. Installing it is simply a matter of finding it and copying it to the `/etc/init.d/` directory. On my setup, the `mongrel_cluster` script file is located at the following location: `/usr/lib/ruby/gems/1.8/gems/mongrel_cluster-<VERSION>/resources/mongrel_cluster`.

Simply copy it to `/etc/init.d/`, and make it executable like this:

```
ezra$ sudo cp \
  /usr/lib/ruby/gems/1.8/gems/mongrel_cluster-1.0.5/resources/\
  mongrel_cluster \
  /etc/init.d
ezra$ sudo chmod +x /etc/init.d/mongrel_cluster
```

Now your Mongrel cluster is configured to load on boot, just like Apache and MySQL. As an added bonus, you can now also use `/etc/init.d/mongrel_cluster [start|restart|stop]` anywhere you read `mongrel_cluster_ctl [start|restart|stop]`. This is nice because it's very familiar to anyone who has used other service scripts like those for Apache and MySQL.

You might need to make a few changes to the `PATH` variable inside the script depending on your specific setup, Linux distribution, and hosting provider's custom configuration. Check with your host provider or the documentation for your Linux distribution in case yours is a little different.

6.3 Configuring the Watchdog

Monit is a simple utility used to manage files, processes, and directories on Unix. You can configure Monit to split your logs if they get too big, start and stop processes, and also keep tabs on resources. Monit can notify you if your memory use gets out of control and actually do something about it. You may want Monit to restart one of the Mongrels in your cluster or restart your nginx web server, if someone changes your configuration file.

For starters, you're going to use Monit to make sure your Mongrels keep running at peak efficiency. You'll need to do three things to get the management process running:

- You will need to install the right version of `mongrel_cluster`. The minimum version of Mongrel you will want to run is 1.0.1.1.

Building Monit on RHEL or CentOS

You need to install a few dependencies before you can get Monit to build on Red Hat or CentOS distributions. Use rpm or yum to search for and install the following packages: flex, bison, and byacc. Once you have these prerequisites installed, you can build Monit with the same instructions shown for other systems.

Earlier versions do not support the `--clean` option. This is important because Mongrel 1.0+ will not start if there is a process identification (PID) file sitting on disk. So if your server crashes and has to be rebooted, Mongrel tries to start up and fails because there was a leftover PID file. The `--clean` option deletes leftover PID files if they exist.

- You need a good `mongrel_cluster.yml` file. You've already built one earlier in this chapter, and that one should work fine.
- You need a Monit configuration file, called `mongrel.monitrc`. This configuration file will tell Monit what to do for each Mongrel on your system.

The first order of business is to install Monit. Most Linux distributions will have a Monit package available in their package managers. On Debian/Ubuntu you can run `sudo apt-get install monit`, and on Gentoo you can run `sudo emerge monit`. If you cannot locate a package for your preferred Linux, don't sweat it, because you can build Monit from source, like this:

```
ezra$ wget http://www.tildeslash.com/monit/dist/monit-4.9.tar.gz
...
ezra$ tar xzvf monit-4.9.tar.gz
...
ezra$ cd monit-4.9
ezra$ ./configure && make && sudo make install
...
```

Next up you need to install the correct version of `mongrel_cluster`. You will want the latest version from RubyForge. It is important to clean up older versions of `mongrel_cluster` if you had any installed:

```
$ sudo gem install mongrel_cluster ↵
&& sudo gem cleanup mongrel_cluster
```

After you've set that up, you are ready to configure Monit. I like to create a separate configuration for each Mongrel cluster. You'll add the following configuration to `mongrel.monitrc`, which you'll keep in Monit's directory, in our case, `/etc/monit.d`:

```
check process mongrel_deployit_5000
  with pidfile /data/deployit/shared/log/mongrel.5000.pid
  start program = "/usr/bin/mongrel_rails cluster::start -C ↵
                  /data/deployit/current/config/mongrel_cluster.yml ↵
                  --clean --only 5000"
  stop program = "/usr/bin/mongrel_rails cluster::stop -C ↵
                  /data/deployit/current/config/mongrel_cluster.yml ↵
                  --only 5000"
  if totalmem is greater than 110.0 MB for 4 cycles then restart
  if cpu is greater than 80% for 4 cycles then restart
  if 20 restarts within 20 cycles then timeout
group deployit
```

Notice that you will need a block for each process that you want Monit to monitor. The previous configuration is for one Mongrel only. The first directive, `check_process`, identifies a process to monitor. I have skipped that directive in favor of the alternative with `pidfile` option that tells Monit which process file to monitor. Recall that each Mongrel instance has a file stored in the `log/mongrel.port.pid` file. The next two directives tell Monit how to start and stop Mongrel. The last three directives tell Monit what to do when certain pathological conditions exist. This configuration will restart Mongrel instances if the memory exceeds a threshold (110.0MB in the previous configuration) or the CPU is too busy for a process. These directives also can take more extreme measures, such as timing out and notifying administrators. Keep in mind that all this is fully automated and requires notification only in extreme circumstances.

Keep in mind that Monit will start your Mongrels with a completely clean shell environment. This means your normal `$PATH` will not be set up. You will need to use the fully qualified path to your `mongrel_rails` command. In the previous config I used `/usr/bin/mongrel_rails`, but you may need to adjust this path depending on where your system installed the command. You can figure out where the command was installed like this:

```
ezra$ which mongrel_rails
      /usr/bin/mongrel_rails
```

A final configuration provides the general setup for Monit, including the configuration for the mail server and alerts. This file is located at `/etc/monit/monitrc`.

```

set daemon 30
set logfile syslog facility log_daemon
set mailserver smtp.example.com
set mail-format {from:monit@example.com}
set alert sysadmin@example.com only on { timeout, nonexistent }
set httpd port 9111
    allow localhost
include /etc/monit.d/*

```

This config is fairly straightforward, but there are a few things to note. `set daemon 30` tells Monit how often to check processes, in this case every 30 seconds. I have found that 30 seconds is perfect for this setting. You need to set your own SMTP server and email addresses for alerts. The last two directives turn on Monit's built-in HTTP server on port 9111, making it viewable only from the localhost, and sets `/etc/monit.d` to be the directory from which to include config files.

When you're done, you can try a couple of commands. You can actually start and stop Mongrel cluster instances through Monit. First you need to make sure Monit has your latest configuration loaded:

```
ezra$ sudo /etc/init.d/monit restart
```

When Monit starts, it will automatically boot your Mongrels. Then you can restart the Mongrels by their groups through Monit:

```
$ sudo monit restart all -g deployit
```

Or restart one single Mongrel by its name:

```
$ sudo monit restart mongrel_deployit_5000
```

To see the current status of your Mongrels, use the status command:

```

$ sudo monit status
The monit daemon 4.9 uptime: 4d 2h 27m

Process 'mongrel_deployit_5000'
  status           running
  monitoring status monitored
  pid              20467
  parent pid       1
  uptime           55m
  childrens        0
  memory kilobytes 50432
  memory kilobytes total 50432
  memory percent   12.8%
  memory percent total 12.8%
  cpu percent      0.0%
  cpu percent total 0.0%
  data collected   Sun Jul 1 14:38:26 2007

```

You may be asking yourself “Who monitors Monit?” That is a great question. Monit is usually very stable, but certain conditions such as “out of memory” can cause Monit itself to crash. If you want to prevent this from happening, you can put Monit under the control of init. On a Linux system, init is responsible for running all the scripts in `/etc/init.d`. init can also respawn daemons if they die. The first step is to remove Monit from the `/etc/init.d` scripts. Consult the documentation for your system for information on how to remove a start-up script from the default run level. On Gentoo, you would do it by running `rc-update del monit`. The next step is to edit `/etc/inittab` and add the following lines near the bottom of the file:

```
mo:345:respawn:/usr/bin/monit -Ic /etc/monitrc
m0:06:wait:/usr/bin/monit -Ic /etc/monitrc stop all
```

Now you can have init to watch Monit. The first step is to stop Monit. Then you tell init to spawn Monit and keep it alive:

```
ezra$ sudo /etc/init.d/monit stop
ezra$ sudo telinit q
```

Now that Monit runs under init, the `/etc/init.d/monit` command will not work to start and stop the Monit daemon. Instead, you will have to kill Monit and let init pick it back up again, like this:

```
ezra$ sudo killall -9 monit
```

You will need some custom Capistrano tasks now that you are using Monit to watch your Mongrels. When you use Monit, you do not need to use `mongrel_cluster/recipes` in your deploy recipe. Instead, you will set the Monit group of the Mongrels you are targeting with this line in your `deploy.rb` file:

```
set :monit_group, 'deployit'
```

Now you need to add the following tasks to your deploy recipe:

```
desc <<-DESC
Restart the Mongrel processes on the app server by
calling restart_mongrel_cluster.
DESC
task :restart, :roles => :app do
  restart_mongrel_cluster
end

desc <<-DESC
Start Mongrel processes on the app server.
DESC
task :start_mongrel_cluster, :roles => :app do
  sudo "/usr/bin/monit start all -g #{monit_group}"
end
```

```

desc <<-DESC
Restart the Mongrel processes on the app server by
starting and stopping the cluster.
DESC
task :restart_mongrel_cluster , :roles => :app do
  sudo "/usr/bin/monit restart all -g #{monit_group}"
end

desc <<-DESC
Stop the Mongrel processes on the app server.
DESC
task :stop_mongrel_cluster , :roles => :app do
  sudo "/usr/bin/monit stop all -g #{monit_group}"
end

```

Now you know how to use Monit to keep a leash on your Mongrels. Monit can be a lifesaver for your production Rails applications, and I highly suggest using it whenever you deploy Mongrels.

6.4 Keeping FastCGI Under Control

Our primary focus has been on Mongrel. I'm going to dedicate the rest of the chapter to FastCGI. If you should find yourself deploying with FastCGI, you'll want to read the next few sections. Otherwise, feel free to skip ahead to Section 6.5, *Building in Error Notification*, on page 138.

Zombie FastCGI Processes

During the dog days of summer in 2005, I noticed that one of my Rails apps was running a little slower than expected. Confident in my debugging abilities, I fired up my SSH client and logged into my shared server. Almost immediately, the server kicked me out with an odd “resource unavailable” error.

After three more tries with the same result, I emailed the customer support team. It turns out that I had fifty processes running, the maximum allowed for any single user! Every one of those processes was a zombie, aimlessly occupying my process allocation but unable to do anything useful. Like a bad horror sequel, one of my Rails apps on a completely different host had the same problem a few days later.

The Apache web server is famous for producing these zombies when running with FastCGI, causing many developers to favor Mongrels or nginx instead. The good news is that a few simple cron tasks can keep zombies from getting out of hand, making the difference between a smoothly running site and one that dies daily. I'll discuss them in *The Reaper* below.

The conclusion to the story is that the sysadmin at the shared host killed the zombie processes, and things began working again. I learned to start a daily cron task that cleans out zombies and gives my server a fresh start. Some people restart their dispatch processes every single hour. You will have to experiment with your specific situation and see what works best.

The Reaper

The reaper is not a black-hooded messenger of doom; he is your best friend. The reaper command reliably prunes back FastCGI processes. Capistrano uses it to restart your Rails app after a fresh deployment. You can also use it to restart processes on a regular schedule.

The reaper is a script you run on the command line. By default it restarts FastCGI dispatch processes for your application only, so you won't disrupt other applications running under the same user account. You can fire off other actions with the reaper as well:

- **restart**: Restarts the application by reloading both application and framework code (the default). Send the USR2 signal to each `dispatch.fcgi` process belonging to the current application.
- **reload**: Reloads only the application, not the framework (like the development environment). Reload sends the HUP signal.
- **graceful**: Marks all the processes for exit after the next request. Graceful sends the TERM signal.
- **kill**: Forcefully exits all processes regardless of whether they're currently serving a request. kill sends the -9 signal. Use this only if none of the other signals is successful.

You can run the reaper without any arguments or request one of the previous actions such as the following:

```
ezra$ ./script/process/reaper --action=graceful
```

In my experience, the defaults don't work on most shared hosts because their output doesn't match the reaper's expectations. The good news is that you can send an extra argument to match the specific output of your host.

Let me show you how I fine-tuned this on one of my shared hosting accounts. First, I tried to run the dispatcher normally. Even though I knew that there were several `dispatch.fcgi` processes running at that very moment, the reaper couldn't find them.

```
ezra$ ./script/process/reaper
```

```
Couldn't find any process matching:
/data/deployit/releases/20060224192655/public/dispatch.fcgi
```

Reading through the reaper code revealed the exact command that the reaper used to find the list of running processes. I called that command manually:

```
ezra$ ps axww -o 'pid command'

PID COMMAND
4830 /usr/bin/ruby dispatch.fcgi
18714 /usr/bin/ruby dispatch.fcgi
2076 /usr/bin/ruby1.8 dispatch.fcgi
12536 -bash
5607 ps axww -o pid command
```

I could then see what was happening. The reaper was looking for the full path to the dispatcher, but the ps command on my server returned a shorter version of the current process list. Consequently, the reaper could not find the full path, so I can't restart this application independently of the others running under that same user account. As configured, the reaper was all or nothing!

Running the same command on my local Mac OS X machine shows the entire path to the dispatch.fcgi script, as it should. A fact of shared hosting is that you can't control systemwide settings, so you may have to adjust your scripts to match.

With this information in hand, I could send a more general argument to restart all dispatch processes running under that user account in order to keep things fresh and zombie-free:

```
ezra$ ./script/process/reaper --action=restart --dispatcher=dispatch.fcgi

Restarting [4830] /usr/bin/ruby dispatch.fcgi
Restarting [18714] /usr/bin/ruby1.8 dispatch.fcgi
Restarting [2076] /usr/bin/ruby1.8 dispatch.fcgi
```

6.5 Building in Error Notification

With a Mongrel cluster in place, your setup has greater scalability, and you should be able to sustain minor failures. With Monit in place to manage your Mongrel clusters, you have the capability to take preemp-tive action when a single Mongrel cluster fails or when resources get scarce.

But most of the time, your failures will come from plain old human error. If you want a good management story, you are going to have to deal with your programmer's mistakes. Usually, Rails errors will generate an application error, the dreaded 500 error page. With Ruby, it's fairly easy to intercept the default error behavior to, for example, send email notifications. And that is exactly what the `exception_notification` plug-in does.

You can read about the `exception_notification` plug-in at the Rails wiki (<http://wiki.rubyonrails.org/rails/pages/ExceptionNotification>). To install it, simply run the installation script like this:

```
ezra$ ruby script/plugin install exception_notification
```

Next, to build notification into a particular controller, include the error notification module. I like to include error notification in `application.rb` so I'll get email notification when any user of any controller encounters an error that I failed to handle correctly, like so:

```
class ApplicationController < ActionController::Base
  include ExceptionNotifiable
  ...
end
```

Next, configure the email addresses that should get notified of Rails exceptions. Put the notification in `config/environment.rb`:

```
ExceptionNotifier.exception_recipients = ←
  %w(you@yourdomain.com another@yourdomain.com)
```

Now, if any error should occur, you'll get an error notification like the following:

```
A ActionController::TemplateError occurred in drives#edit_comment:

undefined method `title' for nil:NilClass
On line #5 of app/views/drives/edit_comment.rhtml

2: <%= error_messages_for 'gift' %>
3: <!--[form:drive]-->
4:
5: <h1><%= @drive.title %></h1>
6: <div>
7:
8: <table><tr>

#{RAILS_ROOT}/app/views/drives/edit_comment.rhtml:5:in ←
`_run_rhtml_47app47views47drives47edit_comment46rhtml'
#{RAILS_ROOT}/vendor/rails/actionpack/lib/action_view/base.rb:326:in ←
`compile_and_render_template'
```

```
#{RAILS_ROOT}/vendor/rails/actionpack/lib/action_view/base.rb:301:in ←
  `render_template'
```

...

Request:

```
* URL: http://changingthepresent.org/drives/edit_comment/65?donate=true
* Parameters: {"donate"=>"true", "action"=>"edit_comment", ←
               "id"=>"65", "controller"=>"drives"}
* Rails root: /home/deploy/importantgifts/current
```

Session:

```
* @write_lock: true
* @session_id: "875ce6f70cb9b8e9348a72147999303c"
* @data: {"flash"=>{}}
* @new_session: true
```

Environment:

```
* GATEWAY_INTERFACE : CGI/1.2
* HTTP_ACCEPT       : */*
* HTTP_ACCEPT_ENCODING: gzip
* HTTP_CONNECTION   : Keep-alive
* HTTP_FROM         : googlebot(at)googlebot.com
* HTTP_HOST         : changingthepresent.org
* HTTP_USER_AGENT    : Mozilla/5.0 (compatible; ←
  Googlebot/2.1; +http://www.google.com/bot.html)
* HTTP_VERSION      : HTTP/1.1
* HTTP_X_FORWARDED_FOR: 66.249.72.161
* HTTP_X_TEXTDRIVE   : BigIP
* PATH_INFO         : /drives/edit_comment/65
* QUERY_STRING      : donate=true
* REMOTE_ADDR       : 66.249.72.161
* REQUEST_METHOD     : GET
* REQUEST_PATH      : /drives/edit_comment/65
* REQUEST_URI       : /drives/edit_comment/65?donate=true
* SCRIPT_NAME       : /
* SERVER_NAME       : changingthepresent.org
* SERVER_PORT       : 80
* SERVER_PROTOCOL   : HTTP/1.1
* SERVER_SOFTWARE    : Mongrel 1.0

* Process: 1620
```

* Server :

```
-----
Backtrace:
-----
```

On line #5 of app/views/drives/edit_comment.rhtml

```
2: <%= error_messages_for 'gift' %>
3: <!--[form:drive]-->
4:
5: <h1><%= @drive.title %></h1>
6: <div>
7:
8: <table><tr>

#{RAILS_ROOT}/app/views/drives/edit_comment.rhtml:5:in ←
`_run_rhtml_47app47views47drives47edit_comment46rhtml'
#{RAILS_ROOT}/vendor/rails/actionpack/lib/action_view/base.rb:326:in ←
`compile_and_render_template'
#{RAILS_ROOT}/vendor/rails/actionpack/lib/action_view/base.rb:301:in ←
`render_template'
#{RAILS_ROOT}/vendor/rails/actionpack/lib/action_view/base.rb:260:in ←
`render_file'
```

...

Voila! This email message is an actual email notification that helped solve a production problem in the code at ChangingThePresent.³ The email contains a full complement of debugging information, including a full trace and back trace, the contents of the session, the offending view code, and the full environment for the HTTP request.

You can configure a few other options as well. Configure the sender with `ExceptionNotifier.sender_address`, and append a string to the subject line (to help with email filters) with `ExceptionNotifier.email_prefix`. This plug-in will send email notifications only when the address is not local. You can configure which IP addresses should be considered as local with `ExceptionNotifier.consider_local`.

With this solution, Rails will notify you whenever your application experiences an exception. You can configure it to work well with your email clients, and because it's plugged directly into Rails, as long as Rails does not fail completely and your network and email keep working, you'll get a notification.

3. <http://ChangingThePresent.org>

6.6 Heartbeat

The `exception_notification` plug-in is a great way to understand, when your application has errors, whether the errors are consistent or intermittent. It's not a complete management solution, though. For larger or more critical production systems, you also need to verify that the system is running at all.

A heartbeat service will tell you when your application fails. I find that a simple script running on a separate host works better than custom solutions because it's easy, infinitely customizable, and deployable on any host with your scripting language. The following script detects when one of four pages is down at ChangingThePresent:

[Download](#) `managing_things/heartbeat.rb`

```
#!/usr/local/bin/ruby

require 'net/smtp'
require 'net/http'
require 'net/https'
require 'uri'

urls = %w{
  http://www.changingthepresent.org/
  http://www.changingthepresent.org/nonprofits/show/23/
  http://www.changingthepresent.org/causes/list/
  https://www.changingthepresent.org/
}

from = 'system@importantgifts.org'

recipients = %w{development@changingthepresent.org}

errors = []

urls.each do |url|
  begin
    uri = URI.parse(url)
    http = Net::HTTP.new(uri.host, uri.scheme == "https" ? 443 : nil)
    http.use_ssl = (uri.scheme == "https" ? true : false)
    http.start do |http|
      request = Net::HTTP::Get.new(uri.path)
      response = http.request(request)
      case response
      when Net::HTTPSuccess, Net::HTTPRedirection
      else
        raise "requesting #{url} returned code #{response.code}"
      end
    end
  end
end
```

```

rescue
  error = "#{url}: #{!}"
  errors << error
  puts error
end
end

unless errors.empty?
  msg = "From: #{from}\n"
  msg += "Subject: ChangingThePresent.org is down!\n\n"
  msg += errors.join("\n")
  puts "sending email to #{recipients.join(', ')}"
  Net::SMTP.start('localhost', 25, 'localhost') do |smtp|
    smtp.send_message(msg, from, recipients)
  end
end
end

```

The four URLs are not haphazard. They represent a secure page, a page-cached page, a fragment-cached page, and a standard dynamic page. The admin team executes this script once every five minutes via a cron job. The script notifies all the developers on the project via an email address that is forwarded to all developers whenever the site is down.

The script counts redirects and success as a successful contact. Anything else is a failure. Timeouts will also trigger a notification.

6.7 Conclusion

The management strategies in this chapter don't cost anything, but they are surprisingly robust. Building repeatable Mongrel configurations rather than command-line options is easy and enables consistent clustering. Configuring your Mongrels in a cluster gives you good performance and some failover. Clustering Mongrel is important because of the Rails shared-nothing strategy.

Clustering is only the beginning of your managing strategy. To run production Mongrels, you need information and control. By using Monit, you get a watchdog that will automatically kill and restart any rogue Mongrels. By using the various email notification features, the scripts will notify the recipients of your choice when the server is down or when anyone encounters a Rails error.

Still, our error recovery solutions are not yet complete. You will need a better handle on monitoring resources and on performance before you have a complete strategy. Read on.

Chapter 7

Scaling Out

You will often want your website to grow. When you can't fit into your existing home anymore, you have to find some way to move up or to add on. The Rails model for scaling will take you beyond the single home owner and into the realm of a real estate developer or community planner. This chapter will examine scaling out.

7.1 The Lay of the Land

I'm going to put down my real estate agent hat for a little while and put on the hat of a community planner. If you own a house near a congested city and work in its busy downtown core, you're all too familiar with multilane highway traffic that travels at times as fast as a cheetah and other times as slow as a statue of a cheetah. Presented with this problem, you might start with one of the following two solutions to the problem:

- Increase the speed limit.
- Increase the number of lanes.

These solutions sound obvious and you have probably heard similar analogies before, but there's a lot more to it. Natural and political laws place a limit on how fast cars can travel safely, and you can add only so many lanes to a highway. These constraints effectively limit how effective either solution can ultimately be.

Sometimes, these solutions are not even attacking the right problem. The obstacles to effectively moving people aren't always speed limits or lanes. You need to consider interfaces—on-ramps and merges—that can slow traffic down. Entrances force lane changes and slowdowns,

exits double the problem, and accidents or construction projects force lane closures. The biggest bottleneck of all, though—and the one that’s responsible for the others—is the destination. Not only are all the cars on the same road, but they’re all heading to the same place. The problem is the *city center itself*. You can only hope that there are enough parking spaces and office space available once you finally reach it!

Your computer infrastructure isn’t much different. Each lane of the highway is a network connection to some service provided by the application. The city center is the resource pool. Every ramp is a client node. Each car is a user request headed downtown to do some business. The idea of adding lanes and increasing speed limits is effectively a way of “scaling up.” You can scale up by upgrading hardware such as CPUs, memory, disks, and network bandwidth. That strategy works sometimes, but upward scaling has its limits. There are only so many CPUs, so much memory, so many disks, and so much bandwidth that you can jam into a single box. These limits will likely never allow your application to meet the demands of the global crowd.

The low ceiling isn’t the only problem with scaling up. As your business grows, the cost of failure becomes greater too. You’ll need redundant systems and hot backups to handle failure and even the occasional hardware upgrade. Ultimately, scaling up is harder, with a lower ceiling.

Most successful web businesses scale up, not by chance or even necessity but by preference. I won’t completely write off scaling up. I’ll touch upon it when I address the database because scaling up has some real advantages in that space.

7.2 Scaling Out with Clustering

Scaling out means adding more servers, complete with their own dedicated CPUs, disks, memory, and network bandwidth. Think back to the traffic analogy for a moment. The ultimate problem was that everyone was heading to the same city center. Scaling out adds a second city center so half the travelers that day would suddenly be on a different road and heading toward a different city center. Imagine what your daily commute would be like tomorrow if half the city’s population were simply not on your road! Scaling out certainly yields greater rewards. But what about cost, complexity, and maintainability?

Scaling out to hundreds of servers can cost you plenty in dollars and complexity, but you don’t have to pay all the price at once. Conve-

niently, scaling out lets the complexity scale with you. In the beginning, designing to scale outward costs little, but your preparations will position you for bigger challenges to come. You can deal with new performance demands later by doing a little prep work today. To get ready, you'll prepare a few key elements of infrastructure. The trick is to get your scaling right early so you can avoid surprises later.

Keep in mind that you'll still have to get your performance right. Even if you plan to scale by throwing money and hardware at the problem, you'll want to save enough time to address performance. I'll talk more about performance in Chapter 9, *Performance*, on page 224.

From a deployment perspective, you're looking at a map something like Figure 7.1, on the next page. You'll have two or three different virtual hosts that may or may not reside on the same servers. Each Mongrel cluster is a separate city center. One server will use Apache or nginx as a static proxy and load balancer. The other two will serve Rails applications through Mongrel clusters. You'll use Capistrano to deploy to each of them. The next few sections will help you set up a simple architecture that can easily grow from a single dedicated server to around five servers with minimal changes to your application. In the sections that follow, I'll walk you through the following:

- Adding multiple virtual machines to your environment
- Setting up subdomains for your cluster using CNAMEs with your DNS provider
- Ensuring your Mongrel servers are deployed as clusters and as services
- Setting up a load-balancing proxy web server with Apache or nginx
- Configuring multimaster and master/slave MySQL clusters

I'll start with the simplest Rails deployment and slowly grow the server into a scaled-out model ready to handle your angry mob of Web 2.0 users. When I'm done, you will have a web server that serves as a static proxy and a load balancer that serves content to one or more Mongrel clusters. This system will serve a typical request as shown in Figure 7.2, on page 148. The user makes a request to a gateway server. If it's a static request, the gateway server simply serves up the static content, and you're done. If not, the gateway server will forward the request to one of several Mongrel clusters. The Mongrel clusters forward the request to an individual Mongrel server.

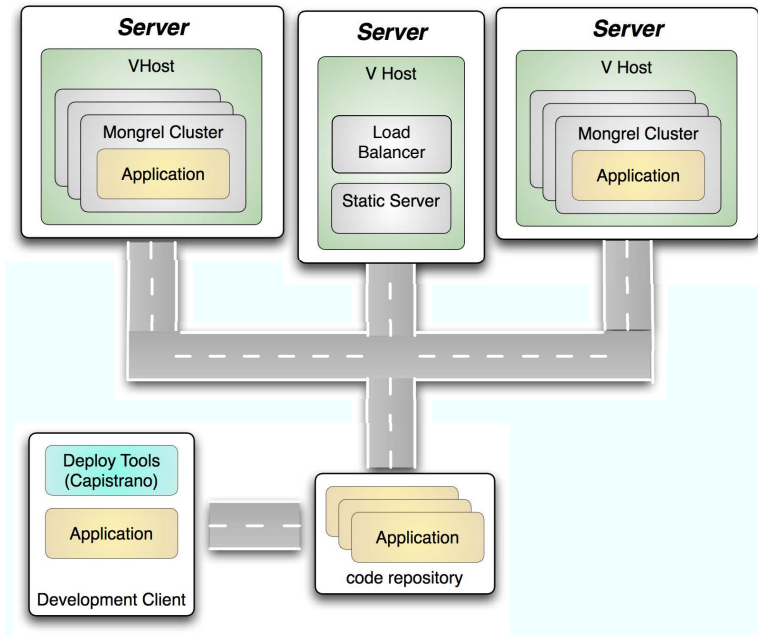


Figure 7.1: Deployment map for scaling out

Prerequisites

If you don't have access to a hosted virtual private server (VPS), you can set a couple of virtual machines up on your desktop. For Windows users, both VMware and Microsoft Virtual PC are free for non-commercial use. Linux users have commercial and free options including VMware, Xen, or OpenVZ. Mac users can use Parallels or VMware, neither of which is free. Check for free trials if you're not sure which one to buy. I prefer VMware, but any one of them will work.

These virtual machine technologies work in a similar way to what a VPS host will provide. They will allow you to install an entirely separate operating system in a contained environment that acts like a computer within your computer. In fact, if you're considering a VPS hosting service and aren't sure how much memory or disk space you need, you can test various configurations with these "home versions" to artificially constrain system resources. Try running your application in a 256MB VMware virtual machine before committing to 12 months of a 256MB managed Xen VPS.

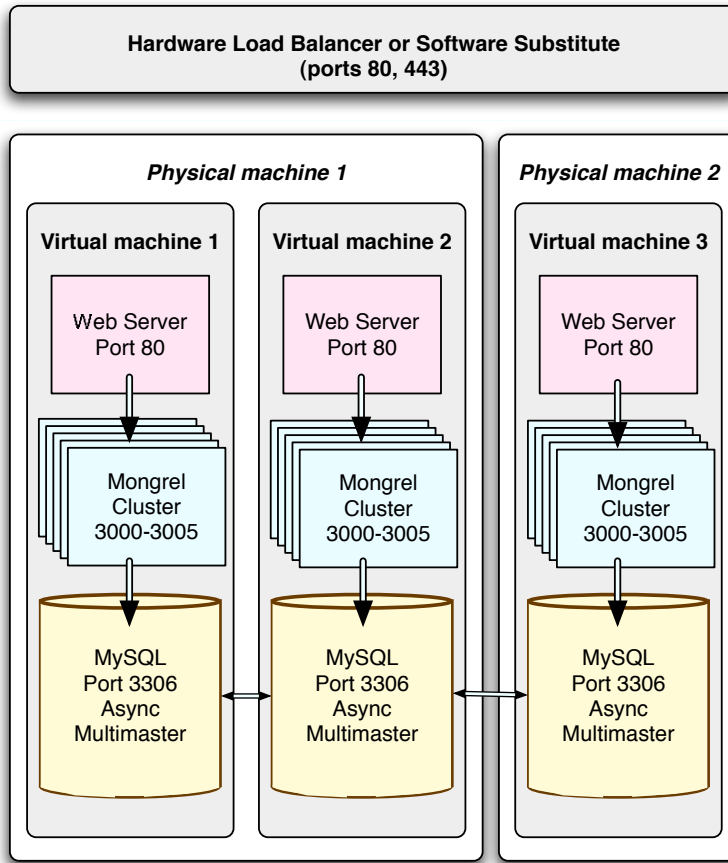


Figure 7.2: Typical Rails clustered deployment setup

You can use any Linux distribution, but I've always found the Red Hat-derived ones like CentOS and Fedora to be the most friendly. They are similar to what many VPS hosting providers will offer (RHEL and CentOS are very popular). There are a lot of Linux package dependencies to get your Rails application up and running. At a minimum, you will need a C/C++ compiler, Ruby and gems related to your app, Subversion, Apache httpd, MySQL Server, and your favorite text editor, be it vi or emacs. Sometimes you can build out a system by just installing your Linux distribution with its “web server” and “developer” options. However, it's not terribly hard to install everything from a minimal installation, especially given the documentation in Chapter 4, *Virtual and Dedicated Hosts*, on page 72.



Joe Asks...

Why Bother with Virtualization for Scaling Out?

Virtualization has many advantages for scaling out. Primarily, you can configure your application to scale out sooner. You can probably get at least two or more virtual private servers for the same price as a single dedicated server. You gain most of the advantages of redundancy and increased performance sooner, and you can always switch to a dedicated box later, with a reduced impact to your configuration and less downtime. Personally, I choose to run virtualized environments even on a dedicated server. I find them far easier to manage and configure. Advances in hardware and software have made virtualization technology fast, and the benefits far outweigh any marginal performance cost.

You will need two virtual machine instances. With most of the software technologies mentioned earlier, you can build one and simply copy the virtual machine files, changing only some identification information such as the IP address and the hostname.

Once you have your virtual machines up and running, create the database and deploy your application with Capistrano to one of them using the techniques you learned in the earlier chapters. You can deploy your application in its simplest form so you can at least start up Mongrel and access your application via a web browser by hitting the Mongrel server directly.

Any application will do, but it should be more than an empty Rails app. If you need a application to work with, try using the example from *Agile Web Development with Rails* found at http://www.pragprog.com/titles/rails2/source_code.

You can find entire books about the administration of Linux, Apache, and MySQL. I may skip some steps here and there to keep your focus on topics specific to Rails deployment. When I do, I'll try to direct you to other resources when necessary to further tighten security or tweak performance.

7.3 Mirror Images

Your server farm will have a number of servers across many roles. Try hard to keep servers in the same role configured identically. Your life will be easier, you will experience fewer surprises, and you'll have less documentation to write. If identical configurations sound like too much work, you're going to love virtualization.

Virtual servers are like files that sit on your hard drive. You can move them, copy them, delete them, and back them up. When it comes time to keep configurations the same, the easiest thing to do is just make a copy. Here are a few strategies for ensuring configuration consistency across your VMs, depending on the size and timing of the change.

Cold Copy It

When you're first setting up your environment, just configure one virtual server. Get that server to the point where all the software, patches, dependencies, and configurations are in place so you can run a single instance of your app. Then, make one copy for each server role, including application servers, web servers, and database servers.

Automate It

You can often automate a change in configuration with Capistrano. You have seen that Capistrano scripts do a good job, use Ruby code, and can distinguish between server roles for different configurations.

Hot Copy It

Larger, more serious configuration changes may require you to shut down the server. The cool thing about VMs in this case is that you can use the copy strategy. Simply pull one server out of your cluster, make your changes to it, and then copy it to replicate all the other servers in the farm. This hot copy approach lets you introduce a new server into the farm to handle additional load. Be careful. You will want to always be able to uniquely identify each server. Whenever you make a copy, you have to be sure to properly set the IP address, hostname, and any other unique information for each server. If possible, automate such a thing with a script common to each of the servers. Remember to document the process!

Just Do It

If you can't justify automating a change or don't want to shut down servers, you might just have to walk through the servers and make the change. Remember to keep organized and document your steps, though—it will make a world of difference.

Keep Offline Master Copies

A master copy is an offline configuration that has never been deployed or exposed as a server to the public Internet. You will use it the first time for your cold copy. After you build your initial VM, you can use that copy as an online master copy. Whenever you need to make configuration changes, you can change this master copy. Most important, this is the copy you can safely deploy should your servers become compromised because of a security breach. Once a server has been compromised, it is hard to ever trust it again. You'll have enough to worry about regarding potential threats to your data, let alone the nightmare of trying to clean out your server farm. Having offline master copies allows you to patch the security hole in the offline copy that has never been exposed to the network and redeploy each of the server roles to the farm.

Use Third-Party Tools

So far I've discussed only custom brute-force approaches to managing these configurations. Third-party tools that can do the same might even be included with your virtual machine software or by your VPS provider. Shop around and talk to your service and software providers.

7.4 Domain Names and Hosts

When you have multiple servers in your environment, managing their names becomes important. You'll manage domain names through the web-based user interfaces you used in Chapter 3, *Shared Hosts*, on page 44, as well as in Chapter 4, *Virtual and Dedicated Hosts*, on page 72. Remember, changes to the domain name configuration can take hours or even days to propagate fully throughout the Internet. Managing these details for a cluster is a little tougher than managing a single web server, but you can usually get by knowing only a few more concepts:

A records The default configuration for most domain name services is to support brainspl.at in addition to www.brainspl.at. The primary



Joe Asks...

So Do I Use an A Record or a CNAME?

When I researched the A record vs. CNAME issue for myself, I remember coming across debates over various uses and abuses of CNAME records and advantages and disadvantages of different configurations. My conservative nature led me to avoid playing games, so I generally follow the rules:

- Use A records for mappings of names to IP addresses.
- Use CNAME records to alias A records.

domain (brainspl.at) is an A, or address, record in DNS terms. This record maps brainspl.at directly to your IP and is the lowest-level mapping.

CNAME records CNAME records are like aliases for an A record, be it one of your own or someone else's. Aliases usually indicate the kind of service that a server provides. For example, www.brainspl.at is an alias to brainspl.at that indicates interest in the HTTP server, and ftp.brainspl.at indicates interest in the File Transfer Protocol. Keep in mind that longstanding conventions exist, and you should follow them where you can.¹

What Names Do I Need?

Armed with your new knowledge of domain name configuration, you now need to decide what names you will need. Try to name all your site's publicly available nodes, including the load balancer and the nodes that it balances. You'll probably have a firewall installed too. Getting your names and visibility right in a real production environment can require some advanced firewall setup, which is beyond the scope of this book. For simplicity, I'll let the web server act as the load balancer and remind you later that a hardware load-balancing solution is definitely a must-have for the most serious websites.

Imagine that you have a configuration involving a load balancer, two web servers, and a database server. You will expose the load balancer

1. See http://en.wikipedia.org/wiki/Domain_name_system for more.

to the network but not the database. So, you'll need a name for the load balancer. The database server may have a name on your local intranet, but it will not have a name in the domain name service (so there will be no `db.brainspl.at`). The load balancer will distribute requests between the two web servers. They will also need names because you'll eventually need to access individual web servers directly or redirect a request to a specific server—for debugging, configuration, or testing, if nothing else. I see three A records and one CNAME because the load balancer will map to the load balancer IP address, and each of the web servers will also have an IP address. I'll use a CNAME for the `www` alias that visitors use. I'll throw in an extra CNAME for a potential caching service. The final table looks like this:

A Records

- `brainspl.at => 999.999.999.100`—load balancer
- `www1.brainspl.at => 999.999.999.101`—first web server
- `www2.brainspl.at => 999.999.999.102`—second web server

CNAME Records

- `www.brainspl.at => brainspl.at`—alias to the load balancer
- `content.brainspl.at => content.contentcache.com`—alias to the content caching service

That last CNAME is to a third-party A record that provides caching of large content such as music, images, and videos.

When setting up both A records and CNAMEs, you need to set the or time-to-live (TTL) parameter. This value will determine how often name servers return to your configuration to check for changes. Setting this value a low value, such as 30 minutes, will give you a little more flexibility to change your configuration with minimal impact to your site. Setting it to a higher value, such as seven days, will provide better performance of your site because client software like browsers will have to do fewer name lookups. I recommend setting it low to start so that you can make a few mistakes with minimal impact. Then once you're comfortable with your configuration, return and increase the values for all A and CNAME records to at least twenty-four hours.

Now that you have named servers, you can start deploying your application to them.

7.5 Deploying to Multiple Hosts

With Rails and Capistrano, you have a lot of deployment options. Capistrano supports three server roles right out of the box:

- The web role points to servers responsible for static content. Apache or nginx lives here.
- The app role points to the server that will run your Rails application. Mongrel lives here.
- The db role points to your database server. MySQL lives here.

Capistrano deploys the right files to each server. If you need to do so, you can override its behavior. With only one server, you generally deploy all roles to that one server. The following Capistrano script is an example of a single-server configuration. I'll reference parts of it for the remaining examples in this section.

```
# Customized deploy.rb
set :application, "brainspl.at"
set :user, "ezra"
set :repository, "http://brainspl.at/svn/#{application}"
set :deploy_to, "/home/#{user}/#{application}"

role :web, "www1.brainspl.at"
role :app, "www1.brainspl.at"
role :db, "www1.brainspl.at", :primary => true
```

Options for Clustering

Given two servers, you now have a decision to make. The three following options are the most reasonable.

Isolate the database: This first option is simple and may offer the best performance for an individual request depending on the application. If your application is transaction heavy and depends on a lot of dynamic data, then this option might be the right choice. With this configuration, the database alone is separate, so it has fully dedicated access to the server resources, which should include lots of fast disks. You will also have the added security of keeping the database further away from the public network interface. You would configure the isolated database option like this:

```
# Relevant lines of deploy.rb
# ...
role :web, "www1.brainspl.at"
role :app, "www1.brainspl.at"
role :db, "internal.brainspl.at", :primary => true
```



Joe Asks...

Why Not Just “Scale Up” the Database?

You absolutely could “scale up” the database. The database server is a good candidate for scaling upward, because it is often a bottleneck and can benefit from ultra-fast disks and lots of memory. You can also put redundant disks in a RAID-1, RAID-5, or RAID-10 configuration that would offer a similar level of redundancy as a software cluster and would probably perform better. Do not underestimate the costs of such hardware, and remember the limitations and consequences of a scale-up approach. They still apply!

Isolate the web server: The second option is to isolate the web server so it can concentrate on caching and serving static pages with lots of memory and a fast network connection. If your application is heavy on static content and wants a chance at surviving the Digg effect, you might want to choose a dedicated web server. The application and database are isolated on a second internal server. Conveniently, you still have the security advantage of keeping the database away from the web server. However, deploying the web server and application server to a separate machines loses the benefit of directly serving cached pages that Rails creates on the fly. Clustered or shared file systems, or another web server on the app server, may solve the problem. In any case, the isolated web server roles look like this in a Capistrano configuration:

```
# Relevant lines of deploy.rb
# ...
role :web, "www1.brainspl.at"
role :app, "internal.brainspl.at"
role :db, "internal.brainspl.at", :primary => true
```

It's a subtle difference that has huge consequences. The type of application you're running and the hardware available to you will dictate the right option. If you plan on quickly growing beyond the capacity supported by either of these options, then you might want to consider a third option, because you'll likely end up there anyway.

Cluster: This third option has both servers running all the roles: web server, application, and database. It offers the benefit of full redundancy. You can lose one entire server, and the site will keep running

with data intact. The site may well perform better under certain kinds of load. Given two users, each will have a full application stack and dedicated hardware ready to serve the individual request. However, the option is somewhat less secure because the database lives in the same environment as the web server, fully exposed to web-related bugs and security risks.

This configuration can be a bear to set up, especially with regard to the database. Separating reads and writes to different databases with a single master/slave configuration won't do you much good if either one crashes.

If you want full redundancy, you need to implement a synchronous database cluster that supports reading and writing to either database instance. I've dedicated a full section to it in Section 7.8, *Clustering MySQL*, on page 179. For now, I'll assume it's already set up. The following Capistrano configuration makes use of it:

```
# Relevant lines of deploy.rb
# ...
role :web, "www1.brainspl.at"
role :app, "www1.brainspl.at"
role :db, "www1.brainspl.at", :primary => true

role :web, "www2.brainspl.at"
role :app, "www2.brainspl.at"
role :db, "www2.brainspl.at"
```

Combining Approaches with More Servers

Capistrano and Rails are flexible enough to support a great number of server configuration options. As soon as you scale beyond two servers, you have many, many more options. The following sections highlight a few of the more popular options.

Four Servers: Clustered Database

This configuration has a clustered database with separate web and app servers. This configuration emphasizes transactions and dynamic data. If your database is the bottleneck or you need to add failover at the database level, this configuration is a good place to start:

```
# Relevant lines of deploy.rb
# ...
role :web, "www.brainspl.at"
role :app, "app.brainspl.at"
role :db, "db1.brainspl.at", :primary => true
role :db, "db2.brainspl.at"
```

Five Servers: Clustered Web Servers

This configuration uses clustered web servers, a separate app server and a scaled-up database. The emphasis for this solution is on static content, but it has extra muscle in the database server to handle load.

```
# Relevant lines of deploy.rb
# ...
role :web, "www1.brainspl.at"
role :web, "www2.brainspl.at"
role :web, "www3.brainspl.at"
role :app, "app.brainspl.at"
role :db, "bigdb.brainspl.at", :primary => true
```

Ten Servers

This configuration, shown in Figure 7.3, on the next page, supports a full cluster with no specific emphasis. Two large database servers support the application as clustering a database to more than two servers starts to yield fewer benefits with each server. If you want to cluster the database server more broadly, consider sharding, which I discuss in more detail in Section 7.8, *Challenge 3: Clustering vs. Sharding*, on page 180.

```
# Relevant lines of deploy.rb
# ...
role :web, "www1.brainspl.at"
role :web, "www2.brainspl.at"
role :web, "www3.brainspl.at"
role :app, "app1.brainspl.at"
role :app, "app2.brainspl.at"
role :app, "app3.brainspl.at"
role :app, "app4.brainspl.at"
role :app, "app5.brainspl.at"
role :db, "bigdb1.brainspl.at", :primary => true
role :db, "bigdb2.brainspl.at"
```

Web Servers vs. Application Servers: What's the Difference?

At this point you've heard a lot about web and app roles. I've also hinted that Mongrels may not make the best web servers. It's time to drill down a little deeper.

The Web Server

The web server is good at quickly routing requests, serving static file content, and caching, so it makes an excellent proxy that sits in front of the application server. After briefly flirting with lighttpd, the Rails community seems to have settled on one of two servers that are preferred in the web role: Apache and nginx. Apache is a scalable, full-featured,

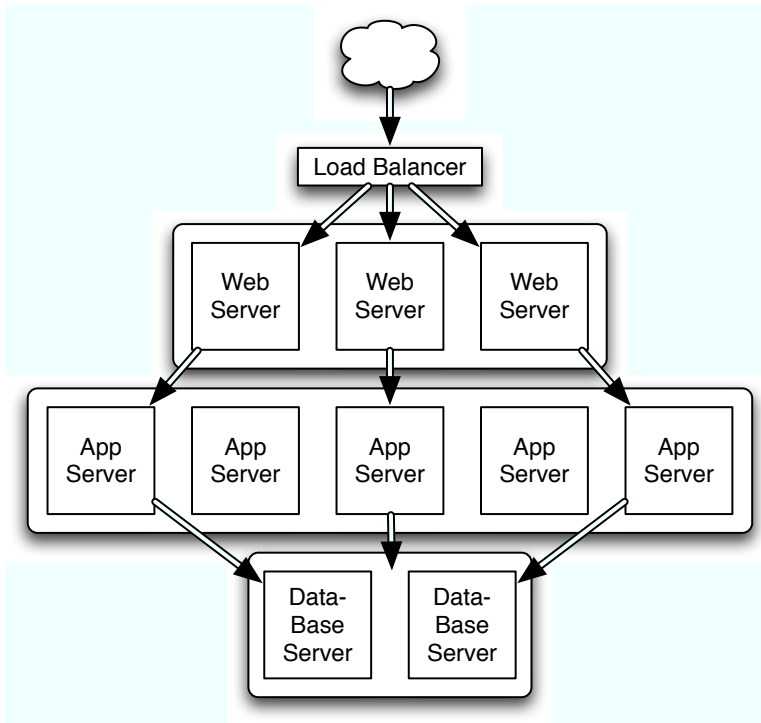


Figure 7.3: A ten-server cluster

and extremely reliable web server. But with Apache, you may get more than you want and may suffer with having to configure it regardless. Enter nginx. This Russian creation is very capable and well suited to sitting in front of a Mongrel cluster. However, nginx has a simpler configuration, is very fast, and uses minimal system resources. It makes a great candidate for virtual hosting services where memory is limited and software efficiency is key.

The Application Server

The application server is a container focused on securely executing code and managing the runtime environment. For Rails, a single runtime environment is not enough because Rails uses a single-threaded architecture. One Mongrel can serve only one request at a time. Because of its share-nothing architecture, each concurrent user request to a Rails application requires an isolated runtime environment.

The Rails application server architecture has two challenges:

- Mongrel is not optimized for serving static content, and doing so puts unnecessary load on the Rails controller.
- In a production environment, you will have multiple application servers on different ports, so you need a router of sorts to distribute requests among them.

You'll need a web server optimized for routing requests, serving static content, and caching. You can also see the need for an application server optimized for serving Rails requests. Mongrel is by far the most preferred server for Rails content because of its performance, stability, and security. FastCGI is also an option and is marginally faster than Mongrel. But because of stability problems and configuration headaches, few would choose FastCGI over Mongrel.

At this point, make sure your Mongrel instance is working as a cluster and running as a service. In the sections to come, I'll lay out the other side of this equation: the static web server.

7.6 Apache

Apache may be the most successful open source project ever created. Apache powers some of the biggest Internet sites in the world and has a huge community. Apache also has an official 501(c)(3) nonprofit behind it—the Apache Software Foundation. Apache is a safe bet to remain the de facto standard web server for a long time to come.

Despite its success, Apache is not always easy to install, configure, or manage. Like anything, it's a matter of perspective and opinion. Some people believe Apache is complex and hard to set up. Others believe it is one of the easiest because of its incredible flexibility. Regardless of which one is true, if you choose to run Apache, you'll want to set it up properly now. You don't want to hammer in a simple configuration and then be a slave to that configuration later. Before you roll up your sleeves, you should have a more detailed picture of what Apache will do for you.

Separation of Concerns: Web Server Style

I'm going to take a little bit of a different approach to configuring Apache here. I'm going to use more virtual host proxies than usual.

I'm going to do this for a few reasons:

- To better isolate various configuration elements to make it easier for you to read and follow.
- To separate the concerns and responsibilities into different virtual servers.
- To mock the behavior of infrastructure components that would be hard to demonstrate while you follow through these examples on your own—unless you happen to have a hardware load balancer on hand to distribute requests between your virtual machines. I don't, so I'll use Apache.

That last point is especially important. You normally would have a hardware load balancer distributing requests to the web servers on each of your virtual machines, which would then either serve up some static content or forward the request to one of the Mongrels in your cluster. You can already begin to imagine the layering of responsibilities. Initially, Apache serves as a web server, taking all incoming HTTP requests. Then, Apache serves as a static proxy, serving static pages as requests come in. Then, when dynamic requests come in, Apache serves as a load balancer that forwards requests to the appropriate web server.

However, in the absence of a hardware load balancer, you'll set up a couple of Apache virtual servers to handle the following tasks:

- Load balancing between the virtual machines
- Forwarding HTTP requests on port 80 to the web server on one of those virtual machines
- Forwarding secure HTTPS/SSL requests on port 443, possibly just to a regular nonsecure HTTP web server on port 80 within our intranet

Prerequisites

Before we start, you'll need to ensure that Apache is installed on your server. If you are hosting with a managed VPS host, your provider may have installed Apache by default. I recommend using Apache 2.2, and that's what I'm going to configure here. You'll also need `mod_ssl` installed to handle HTTPS requests on port 443. If you don't have these installed, it's usually a simple matter. On CentOS or Fedora, use `yum install httpd` and `yum install mod_ssl`. On Debian or Ubuntu, use `apt-get install apache` and `apt-get install libapache-mod-ssl`. You can also compile Apache from source, but for that I suggest buying an Apache book.

To fully simulate a load-balanced environment on your local machine, you'll need three (yes, three) virtual machines. Now would be a good time to make copies of your virtual machine image and configure their hostnames and IP addresses so that you have three uniquely identifiable machines.

Apache as a Load Balancer

Using Apache in place of a hardware load balancer may not yield the best performance, but it will give you an opportunity to explore the proxy balancer features that Apache provides in a simpler context. In essence, you have two virtual machines, and you want to distribute evenly between them. How evenly depends on the load balancer implementation, and Apache's is fairly simplistic, but it will do for now.

Apache's configuration starts with one file found at one of two locations depending on your Linux distribution:

- *Debian, Ubuntu:* /etc/apache2/conf/apache2.conf
- *Fedora, CentOS:* /etc/httpd/conf/httpd.conf

The contents of the files are similar. From here on in, we'll refer primarily to the apache2-based names. On some Linux distributions, there will be an empty httpd.conf file besides the apache2.conf file. Ignore it.

I've noticed that some VPS service providers like to break the configuration file up into pieces and customize it quite a bit. You should leave the configuration as intact as possible because it's likely optimized for the limitations of your VPS. Also, they may already have a directory for you to place your own custom site configurations in. Be sure to read the specific documentation for your VPS host. Different Linux distributions may already have a directory for you to place your own site configurations in. So again, be sure to check with the documentation for your specific Linux distribution. Usually the only thing that is different is the specific directory locations. They will always be fairly obviously named, derived from either apache or httpd, with custom app directories named sites and apps.

Fedora and CentOS have a fairly simplistic directory structure that you will need to customize for yourself. Ubuntu has a nice default directory structure that can be easily imitated on Fedora and CentOS. However, it's bad enough the Apache configuration files are named differently and are in different locations. So, to make this discussion as easy to

follow as possible, we'll make a new directory for our Rails applications so we can all be on the same page.

First let's orient ourselves. Navigate to the Apache 2 configuration directory, which again will be either `/etc/apache2/conf` or `/etc/httpd/conf`. Then at the command line, enter `tail apache2.conf` or `tail httpd.conf`. At the bottom of the file, you will notice that it probably “includes” a couple of other directories, for example:

- Include `/etc/apache2/conf.d/`
- Include `/etc/apache2/sites-enabled/`

The first `conf.d/` directory is for common or reusable snippets of configuration. Think of it like a `lib` directory of sorts but for configuration. We won't be using it here. The second should appear on most Ubuntu or Debian Linux distributions. Your Linux distribution may differ, or your VPS host provider may have included some other directories, which you're free to use instead of those we'll suggest here. For simplicity, let's add a new included configuration directory. At the very end of the file—below the other `Include` statements—add the following:

```
Include conf/applications/*.conf
```

This line simply includes your private configuration file, giving you a place to work. It can be any directory you like. You can now add your own `*.conf` files to the `/etc/apache2/conf/applications/` subdirectory, which act like extensions to the master configuration file. The other 990 lines of `apache2.conf` (aka `httpd.conf`) are beyond the scope of this book to discuss in detail. The good news is that the vast majority of those lines are actually inline documentation! The Apache developers do a good job of documenting the configuration file, or at least the basics of it. Take a look and read it. While you're there, as an exercise, find some of the following pieces of information: the document root, the user and group to run the processes as, the number of worker processes, the listening port, the log file locations, and the virtual host example. Here's a bonus question: if you have `mod_ssl` installed, how is the SSL configuration loaded? I'll touch upon that in a bit.

The Apache configuration file looks kind of like XML, but it uses number (`#`) signs to comment lines. Once you are a little more familiar with the Apache configuration files, you can start to create your own. You're going to be configuring virtual hosts, which will in some cases override some of the configurations you saw in `apache2.conf`. Most notably, the

root directory will no longer point to the document root that you found. Your virtual host will handle the routing of those requests instead.

Configuring the Load Balancer VM

You're going to create three files to cleanly separate concerns. All of them should be placed in the `/etc/apache2/conf/applications` directory included in the `apache2.conf` file you edited earlier. If the `/etc/apache2/conf/applications` directory doesn't exist yet, create it now.

- `cluster.conf` will define a load balancer that will distribute requests across two or more machines.
- `http_proxy.conf` will define a virtual host that will proxy typical HTTP requests on port 80 to the load balancer.
- `https_proxy.conf` will define a virtual host that will proxy secure HTTPS requests on port 443 to the load balancer.

Let's start with `cluster.conf`, into which you'll put the following:

```
# cluster.conf
<Proxy balancer://mycluster>
  BalancerMember http://10.0.0.102:80
  BalancerMember http://10.0.0.103:80
</Proxy>
```

This file defines the cluster definition itself. The Proxy stanza defines the load balancer named *mycluster*. You are free to name the cluster whatever you like, and it should probably be something meaningful to your environment or application.

The balancer includes two `BalancerMember` entries—one for each of our virtual machines. Here I'm using the IP address and specifying the port explicitly. In certain cases, you may have different servers running on different ports, and Apache lets you fully map requests received on port 80 of the proxy to any port on the balancer members. You'll see an example of that later when we map requests to our Mongrel cluster.

By itself, `cluster.conf` would not impact your site very much. You need to somehow tell the server to use the balancer, which brings us to the next step: defining the virtual host to proxy the requests. The file you'll use to do that is `http_proxy.conf`:

```
# http_proxy.conf
<VirtualHost *:80>
  ServerName brainspl.at
  ServerAlias www.brainspl.at
  ServerAlias 10.0.0.101 # if you don't have a hostname yet
```

```

ProxyPass / balancer://mycluster/
ProxyPassReverse / balancer://mycluster/

ErrorLog logs/http_proxy_error_log
TransferLog logs/http_proxy_access_log
LogLevel warn
</VirtualHost>

```

The first three lines, `ServerName` and `ServerAlias`, tell the virtual server which hostnames to intercept. These commands allow you to host multiple websites with different domain names on a single server easily. That's pretty nice stuff. I generally map the A record from my DNS configuration to the `ServerName` property if I can and then map any relevant CNAME records in the `ServerAlias`. That implementation is clean and consistent with our DNS configuration.

The next two lines, `ProxyPass` and `ProxyPassReverse`, tell Apache to map the root path (/) of this virtual host to a load balancer called `mycluster`.

Finally, you'll configure the location and name of our error and access logs, as well as set the log level, which is pretty self-explanatory.

Next, I'll dive a little deeper and configure a secured port just like this. I'll put this configuration in a file called `https_proxy.conf`. It starts out exactly like the HTTP version but then gets a little more complicated. Here is what the file should look like:

```

# https_proxy.conf
NameVirtualHost *:443
<VirtualHost *:443>
    ServerName brainspl.at
    ServerAlias www.brainspl.at
    ServerAlias 10.0.0.101 # if you don't have a hostname yet
    ProxyPass / balancer://mycluster/
    ProxyPassReverse / balancer://mycluster/
    ErrorLog logs/https_proxy_error_log
    TransferLog logs/https_proxy_access_log
    LogLevel warn

    RequestHeader set X_FORWARDED_PROTO 'https'

    SSLEngine on
    # The following line was broken to fit the book.
    # Don't break it when you type it!
    SSLCipherSuite ALL:!ADH:!EXPORT56:RC4+RSA:
+HIGH:+MEDIUM:+LOW:+SSLv2:+EXP:+eNULL
    SSLCertificateFile /etc/apache2/conf/ssl/crt/server.crt
    SSLCertificateKeyFile /etc/apache2/conf/ssl/key/server.key

```

```

<FilesMatch "\.(cgi|shtml|phtml|php)$">
    SSLOptions +StdEnvVars
</FilesMatch>
<Directory "/var/www/cgi-bin">
    SSLOptions +StdEnvVars
</Directory>
BrowserMatch ".*MSIE.*" \
    nokeepalive ssl-unclean-shutdown \
    downgrade-1.0 force-response-1.0
</VirtualHost>

```

The first line tells Apache that you want to access your virtual host by names based on the URL of the incoming request. Without this, your server would likely never be invoked because the default handler will grab all the incoming requests. With this enabled, when it sees the server name or one of the server aliases in the URL, it knows that this is the virtual host to use.

The next seven lines of `https_proxy.conf` look very much like its HTTP counterpart. In fact, you could have created an include file for the first four lines to avoid the duplication.

However, I chose to duplicate it for readability and because it's four lines in two files in the same directory. I'll warn you that there's a nice balance somewhere between excessive duplication and excessive hierarchies of include files. Both can be overdone.

The rest of the file is quite different, starting with RequestHeader called `X_FORWARDED_PROTO`. Recall that in your cluster configuration, both of your balancer members used basic, unencrypted HTTP on port 80. Without forwarding the protocol, your Rails application would be unaware that the request actually came through over a secure connection. This information is important to e-commerce applications that might redirect the user to a secure page when necessary. `X_FORWARDED_PROTO` tricks Rails into thinking that it was directly requested via an HTTPS protocol.

The rest of the lines are awkward to the extreme. This confusion loses friends for Apache. But there is good news. Luckily, the `mod_ssl` installation or VPS host probably created a default SSL configuration file, usually called `ssl.conf`. On Fedora and CentOS it is located in `/etc/apache2/conf.d/`. On Ubuntu and Debian, it is located in `/etc/apache2/mods-available`. Also, on Ubuntu/Debian you should also see a symbolic link to `ssl.conf` in `/etc/apache2/mods-enabled`. If you do not, you need to enable the module by typing on the command line: `a2enmod ssl`. Even

though it sounds annoying, Ubuntu's `a2enmod/a2dismod` and `a2ensite/a2dissite` are worth looking into.

Regardless of where `ssl.conf` is located, in it you'll find all the same lines that are listed earlier (and more). I certainly won't try to increase our page count by repeating the file here, so you should go give it a quick read if you have it.

There are two options that I should mention, though: `SSLCertificateFile` and `SSLCertificateKeyFile`. These two lines specify the location of your private key file and your certificate. SSL and public key cryptography is another one of those subjects that would double the size of this book. I'll settle for giving you enough information to set up your test environment, but you should definitely research this topic further for your production environment. Luckily, most hosting providers will help you out here and may even properly set up the keys up for you. You do have to pay for these keys to be signed by a certificate authority for them to be valid. You don't have to do that with your test certificates, but realize that they won't be secure, and your user's browsers will tell them so with an irritating warning.

Here's how to generate the test certificates:

```
#root> # Generate a private key file with a passphrase
#root> openssl genrsa -des3 -out server.key 1024

#root> # TEST ONLY: Remove the passphrase to make
#root> # our test environment easier to manage
#root> # DO NOT do this in production. The *.pem
#root> # file is the key file without the passphrase
#root> openssl rsa -in server.key -out server.pem

#root> # Generate a certificate signing request.
#root> # Answer aquestions as accurately as you can for test environment
#root> openssl req -new -key server.pem -out server.csr

#root> # TEST ONLY: Self sign the key.
#root> # In production the Certificate Authority's signature is what matters.
#root> openssl x509 -req -in server.csr -signkey server.pem -out server.crt
```

An alternative to generating them is to just use the examples that Apache created when you installed `mod_ssl`. You can check the default `ssl.conf` I mentioned before to find the locations of those example files.

In a true production situation, you'll want keep the key file encrypted and lock down the file itself so that only root has access to it. If you

lose this file or if it is compromised by a malicious party, you will have to buy a new certificate and immediately revoke the old one.

With that, your Apache-based software load balancer is done. You can now test it by starting Apache on all three virtual machines. You can start, restart, stop, or test the Apache configuration as follows:

- `sudo /etc/init.d/apache2 start`
- `sudo /etc/init.d/apache2 restart`
- `sudo /etc/init.d/apache2 stop`
- `sudo /etc/init.d/apache2 configtest`

The `configtest` option will often give some insight into any problems if the server is failing to start.

To test the cluster and see how it behaves, you should put something interesting and uniquely identifiable in the `/var/www/html/index.html` file of your balancer members. That way, you can watch how your balancer distributes requests between them by refreshing the balancer URL. If everything is working properly, you should see the page alternating between the two balancer members.

You're not here to serve static `index.html` pages, though. It's now time to set up the balancer members with your Rails application! The cool thing is that it's really no different from what you've seen so far. It's just another proxy balancer on another server. You already know most of what you need, but let's step through it together.

Apache as a Mongrel Proxy

As you recall, Mongrel is a cool little web server that's custom-tailored to serve up a single request through the Rails share-nothing architecture. Therefore, you need to run multiple Mongrels to allow multiple users of our application to use your site concurrently. Otherwise, your users would all be waiting in line for a single Mongrel server. You've just learned in the previous section that Apache can balance requests across multiple servers, so let's do that for Mongrel now.

First remember that you're no longer on the same virtual machine as before. You're done with the software load balancer and are now working on one of the balancer members.

On each balancer member, you're going to create two files, only to keep the concerns separated as before. These files will also reside in `/etc/apache2/conf/applications/`, and you'll need to remember to add the `Include conf/applications/*.conf` to `/etc/apache2/conf/apache2.conf`. These are the files you'll need:

- `mongrel_cluster.conf` will define a load balancer that will distribute requests across two or more Mongrel servers.
- `mongrel_proxy.conf` will define a virtual host that will proxy typical HTTP requests on port 80 to the Mongrel cluster.

Note the lack of a secure SSL configuration. The reason for that omission is that our software load balancer configured in the previous section will take care of that for us. A hardware load balancer would do the same. Secure requests are proxied through to a basic HTTP service on port 80 of our balancer members, which are inside our firewall. This keeps the configuration of the balancer members far cleaner. The exception is if you do want to expose your balancer members directly (for example, www1.brainspl.at), then you may need additional configuration in the load balancer to support SSL for each one.

The Mongrel cluster configuration contained in `mongrel_cluster.conf` will look very familiar:

```
# mongrel_cluster.conf
<Proxy balancer://mongrelcluster>
  BalancerMember http://0.0.0.0.8000
  BalancerMember http://0.0.0.0.8001
  BalancerMember http://0.0.0.0.8002
  BalancerMember http://0.0.0.0.8003
</Proxy>
```

This time, you'll notice that we're not balancing to a different server. Recall our Capistrano roles. In this case, it's clear that this one server is filling both the web and app roles. If we wanted to separate the web and app roles, we'd run the Mongrels on a different server, and the IP addresses in the cluster would be to a remote server. For example:

```
# Alternative mongrel_cluster.conf
# with separated web and app roles
<Proxy balancer://mongrelcluster>
  BalancerMember http://10.0.0.104.8000
  BalancerMember http://10.0.0.104.8001
  BalancerMember http://10.0.0.104.8002
  BalancerMember http://10.0.0.104.8003
</Proxy>
```


Also remember that in our `/etc/mongrel_cluster/myapp.conf` file, there was a line restricting the IP address allowed to access the Mongrel servers:

```
# Partial /etc/mongrel_cluster/myapp.conf
# ...
address: 0.0.0.0
# ...
```

If you're running both on the same server, you can use the IP address 0.0.0.0 or 127.0.0.1. If you've separated the web and app roles, this address line will have to match the web server/Mongrel proxy—the server you're working with now (for example, 10.0.0.101). Note that these are all internal IP addresses we're using here, not public IP addresses exposed to the Internet.

Also recall the following two lines from `/etc/mongrel_cluster/myapp.conf`:

```
# Partial /etc/mongrel_cluster/myapp.conf
# ...
servers: 4
port: "8000"
# ...
```

These two values will determine how many balancer members you will have and what their port numbers will be. In this example, there would be four servers ranging from port 8000 to 8003. Thus, that's our balancer configuration.

The second file that you need on each balancer member, and the final Apache configuration file we'll deal with, is `mongrel_proxy.conf`. If you're keen, you are probably thinking you already know the answer here, because you can just add a virtual host that routes all requests to the balancer. That does indeed work, and the configuration would look nearly identical to the virtual hosts we defined on the load balancer:

```
# A very simple mongrel_proxy.conf
<VirtualHost *:80>
  ServerName www1.brainspl.at
  ServerAlias 10.0.0.102 # if you don't have a hostname yet
  RequestHeader set X_FORWARDED_HOST 'www.brainspl.at'

  ProxyPass / balancer://mongrelcluster/
  ProxyPassReverse / balancer://mongrelcluster/

  ErrorLog logs/mongrel_proxy_error_log
  TransferLog logs/mongrel_proxy_access_log
  LogLevel warn
</VirtualHost>
```

I have added only one new element here. Did you spot it? The `X_FORWARDED_HOST` header is there to trick Rails into thinking the hostname is one thing, even if it is actually something else. The reason for this is that after all of this proxying and indirection, the original hostname will likely be lost in the shuffle. This trick just makes it easier for Rails to do things like redirect to its own server, without having to worry about unintentionally getting an internal hostname instead of the public web address.

The disadvantage here is performance. This configuration would have Mongrel serving up static content and images, as well as all cached Rails pages. You didn't go through all this work just to be as slow as Mongrel! You want to leverage the Apache web server and have it serve up the static stuff. The unfortunate solution here is yet another configuration that will have you turning up your nose a bit. It is not a trivial or easily digestible approach. Luckily, once again, you can pretty much take it line for line and use it in your own applications.

There is another approach that does away with the ProxyPass and ProxyPassReverse configurations and replaces them with a number of URL-rewriting statements. The advantage is that Apache will serve static content directly, which is far faster and leaves your Mongrels available for more important work that actually requires application code to run. The following listing contains the `mongrel_proxy.conf` file in its entirety. I've numbered the sections for later discussion and identified the purpose in capital letters where relevant. Look through it, and then I'll walk you through it:

```
# A full featured mongrel_proxy.conf
<VirtualHost *:80>
  ServerName www1.brainspl.at
  ServerAlias 10.0.0.102 # if you don't have a hostname yet
  RequestHeader set X_FORWARDED_HOST 'www.brainspl.at'

  ### New configuration elements begin here. ###

  # 1. Document root specified to provide access to static files directly
  DocumentRoot /home/deploy/applications/myapp/current/public
  <Directory /home/deploy/applications/myapp/current/public>
    Options FollowSymLinks
    AllowOverride None
    Order allow,deny
    Allow from all
  </Directory>

  RewriteEngine On
```

```

# 2. SECURITY: Don't allow SVN directories to be accessed
RewriteRule ^(\./)?\.svn/ - [F,L]
ErrorDocument 403 "Access Forbidden"

# 3. MAINTENANCE: Temporary display of maintenance file if it exists
RewriteCond %{DOCUMENT_ROOT}/system/maintenance.html -f
RewriteCond %{SCRIPT_FILENAME} !maintenance.html
RewriteRule ^.*$ /system/maintenance.html [L]

# 4. PERFORMANCE: Check for static index and cached pages.
RewriteRule ^/$ /index.html [QSA]
RewriteRule ^([^.]+)$ $1.html [QSA]

# 5. OTHERWISE: If no static file exists, let Mongrel handle the request
RewriteCond %{DOCUMENT_ROOT}/%{REQUEST_FILENAME} !-f
RewriteRule ^(\./)$ balancer://mongrel_cluster%{REQUEST_URI} [P,QSA,L]

# 6. PERFORMANCE: Compress text output for compatible browsers
AddOutputFilterByType DEFLATE text/html text/plain text/xml
BrowserMatch ^Mozilla/4 gzip-only-text/html
BrowserMatch ^Mozilla/4\.0[678] no-gzip
BrowserMatch \bMSIE !no-gzip !gzip-only-text/html

### End new configuration elements, logging below is the same. ###

ErrorLog logs/mongrel_proxy_error_log
TransferLog logs/mongrel_proxy_access_log
LogLevel warn
</VirtualHost>

```

The first thing you'll notice is a fairly typical-looking web server document root stanza (#1). This is what allows static content to be served. However, before it attempts to serve any file, Apache must execute a number of rewrite rules. These rules are based on regular expressions that check for some condition and then rewrite the request to modify the resulting behavior. For example, the first rewrite rule (#2) blocks access to `.svn` directories that Capistrano tends to leave behind. The next group of rules form a maintenance (#3) rule that lets you gracefully respond to visitors while your site is not available. But the next rules (#4) demonstrate the overall goal: better performance. They look for static index pages when no file is specified in the URL and also serve up cached Rails pages if they exist. If Apache can't find a static file matching the request, Rails handles the request through the last pair of rewrite rules (#5). Finally, to speed up network transfers at the expense of some processing power, you can optionally enable the `mod_deflate` output filter (#6) to compress outbound text data.

These are huge performance advantages for high-traffic sites. Not only is Apache faster at serving static content, but it keeps unnecessary load off of the Mongrels so they can efficiently handle only Rails requests.

You can now start up Apache and the Mongrel cluster on your balancer members. Better yet, have Capistrano do it! After all, that's what Capistrano is for. Also, you have only a single database so far, and therefore you have to configure it to accept connections from remote servers. This database configuration is usually a simple matter of granting permissions to remote users (for example, 'deploy'@'10.0.0.102') on your database. I'll cover more advanced MySQL topics later in this chapter.

Congratulations! You have now configured a highly flexible and high-performance clustered server architecture. If you look back and consider some of your options, you can scale this out to six servers quite easily: the software load balancer, two web proxy servers, two application servers, and a database server. You can play around with your local virtual machines to try adding another web server or to try separating the web and app roles onto different hosts. Otherwise, if you've found all this to be a little overbearing, with too much unneeded flexibility and indirection, or if your server is strictly limited to low resources, you might need an alternative to Apache. In that case, there's nginx.

7.7 nginx, from Russia with Love

nginx (pronounced “engine-x”) is a fast, lightweight web server written by Igor Sysoev. It is extremely well suited as a front-end server for Mongrel clusters. Out of the box, some find that nginx serves static files faster and under heavier load than Apache, often using a fraction of the resources under similar work loads. Where Apache focuses clearly on modularity and flexibility, nginx focuses on simplicity and performance. That's not to say nginx isn't feature rich, because it has nice built-in rewrite and proxy modules and a clean configuration file syntax that makes it a pleasure to use.

The proxy module has similar capabilities to `mod_proxy_balancer` in Apache, so it works great for fronting clusters of Mongrels. Conditional if statements and regular expressions matching allow precise control over which requests get served as static content and which dynamic requests nginx will proxy through to a Mongrel back end.

nginx is surprisingly full-featured considering how fast and efficient it is. It has support for SSL, HTTP AUTH, FastCGI, gzip compression, FLV

streaming, memcached, and many other modules, so you'll be able to handle the more advanced topics in this book such as caching and clustering. The nginx wiki (<http://wiki.codemongers.com/nginx>) is the definitive place go for nginx documentation.

nginx can do everything you configured Apache to do in the previous section: software load balancing, acting as a Mongrel proxy, and serving static content. If you repeated everything all over again with nginx, you'd probably find it quite repetitive. Instead, I'll show you the nginx configuration and separate the concerns as before. That should give you enough knowledge to configure nginx as we did Apache or however you like. I think you'll agree that the simplicity of the nginx configuration will make it quite a bit more straightforward compared to Apache.

Starting, Stopping, and Reloading

If you haven't already noticed, nginx has a more hard-core feel to it. Case in point: you have to compile it from source, and even after it's installed, it doesn't come with all the user-friendly service scripts that Apache comes with. You've already installed nginx in Chapter 4, *Virtual and Dedicated Hosts*, on page 72. To start it, you'll be running the executable directly, and to stop or restart it, you'll be using the kill program to send signals to the process. This sounds like it could get messy, but luckily the basics for using it are pretty simple. To start the server, run the command `/usr/local/nginx/sbin/nginx` as root. That command will load the configuration file `at/usr/local/nginx/conf/nginx.conf`. To load or test other configuration files, you'll need a couple of options:

- c filename Load the configuration file named filename instead of the default file.
- t Don't run the server. Just test the configuration file.

As with other *nix applications, you can control nginx through the use of signals. To use signals, you'll need the process ID. Use this version of the ps command to get it (output truncated to fit the book):

```
ezra$ ps -aef | egrep '(PID|nginx)'
UID      PID PPID  .. CMD
root    6850   1 .. nginx: master /usr/local/nginx/sbin/nginx
nobody  6979 6850 .. nginx: worker
nobody  6980 6850 .. nginx: worker
nobody  6981 6850 .. nginx: worker
nobody  6982 6850 .. nginx: worker
```

The master process PID is 6850, as you can see in the Parent Process ID (PPID) column of the output. nginx is architected as a single master process with any number of worker processes. We are running four workers in our configuration. You can stop the master process with the kill 15 signal (kill -15 6850), which will also kill the worker processes. If you change a configuration file, you can reload it without restarting nginx:

```
ezra$# The -c option is only needed if your .conf file is in a custom location.
ezra$ sudo /usr/local/nginx/sbin/nginx -c /etc/nginx/nginx.conf
ezra$ sudo kill -HUP 614
```

The first command sets up the new configuration file. The second sends a kill signal with HUP. The HUP signal is a configuration reload signal. If the configuration is successful, nginx will load the new configuration into new worker processes and kill the old ones. Now you know enough to run the server, stop the server, and configure the server. The next step is building a configuration file.

Configuring nginx

nginx has a master configuration file that includes a number of other files, including our virtual host configurations. The master configuration file is stored at /usr/local/nginx/conf/nginx.conf. We're going to add a line to the end of that file to include our virtual host configurations. You're going to add only one line, but it's important to put it in the right spot. You want it in the http block:

```
# Partial nginx.conf
# ...
http {
    # ...
    # Include the following line at the end of the http block
    include /etc/nginx/vhosts/*.conf;
}
```

Be sure to create the vhosts directory for yourself. This should seem familiar, because it is very much like the approach you saw when setting up Apache. However, the nginx master configuration file is not well documented with inline comments, so I've done that for you in Appendix A, on page 258. Please take this time to refer to the nginx.conf file on your server, using Appendix A as a guide.

There is a default virtual host built into the master configuration file that you should remove. As you'll see in the next section, you'll be

replacing the default virtual hosts with your own. You'll keep it in a separate file for cleanliness, though.

Virtual Host Configuration

The nginx virtual host configuration is similar to the Apache equivalent but with less noise. The syntax is more like that of a domain-specific language than a structured file format, which is more comfortable for Ruby programmers. You'll find most of the configuration elements familiar from our earlier discussions of the Apache configuration, but I'll go through each just to be sure.

The first thing you'll do in your virtual host configuration is set up a load-balancing cluster for your Mongrels. You'll then configure some typical HTTP details such as the server name, port, root directory, error files, and logs. Finally, you'll set up the URL-rewriting rules to make sure you get the most out of nginx by having it serve static files and cached Rails files and to help keep unnecessary load off your Mongrels.

Take a look at an nginx virtual host configuration file now. I'll name mine after my site and call it `brainspl.at.conf`:

```
# brainspl.at.conf
# nginx virtual host configuration file
# to be included by nginx.conf

# Load balance to mongrels
upstream mongrel_cluster {
    server 0.0.0.0:8000;
    server 0.0.0.0:8001;
    server 0.0.0.0:8002;
}

# Begin virtual host configuration
server {
    # Familiar HTTP settings
    listen 80;
    server_name brainspl.at *.brainspl.at;
    root /data/brainspl.at/current/public;
    access_log /var/log/nginx/brainspl.at.access.log main;
    error_page 500 502 503 504 /500.html;
    client_max_body_size 50M;

    # First rewrite rule for handling maintenance page
    if (-f $document_root/system/maintenance.html) {
        rewrite ^(.*)$ /system/maintenance.html last;
        break;
    }
}
```

```

location / {
    index index.html index.htm;

    # Forward information about the client and host
    # Otherwise our Rails app wouldn't have access to it
    proxy_set_header    X-Real-IP    $remote_addr;
    proxy_set_header    X-Forwarded-For $proxy_add_x_forwarded_for;
    proxy_set_header    Host $http_host;
    proxy_max_temp_file_size 0;

    # Directly serve static content
    location ~ ^/(images|javascripts|stylesheets)/ {
        expires 10y;
    }
    if (-f $request_filename) {
        break;
    }

    # Directly serve cached pages
    if (-f $request_filename.html) {
        rewrite (.*) $1.html break;
    }

    # Otherwise let Mongrel handle the request
    if (!-f $request_filename) {
        proxy_pass http://mongrel_cluster;
        break;
    }
}
}

```

The upstream block defines a load-balancing cluster of three Mongrel servers, which in this case happen to be on the same host as the nginx server. You can, of course, separate the Mongrels onto their own application server and then simply specify a remote IP address here.

You can define as many clusters like this as you need, but be sure to name each one uniquely and descriptively. In this case, I named it fairly generically as `mongrel_cluster`.

The server block is the virtual host directive. You will need one server block for each Rails app you want to run; pair it with a cluster as you did in your upstream block. If you have only a single virtual host accessing the cluster, you might as well keep it in the same file. But if you have two or more virtual hosts accessing it, you might want to put the upstream block in its own include file. That way, it's easier to find, and you can maintain your separation of concerns as before.

The contents of the server block begins with some basic HTTP configuration. This HTTP configuration is quite self-explanatory, a result of the simplicity of the nginx configuration syntax. Read through it now. First, I'm configuring nginx to listen on the standard HTTP port 80. The server is named brainspl.at, and I've also aliased all subdomains (*.brainspl.at). I've set the document root to the /public directory of my Rails application, which was deployed with Capistrano. I pointed the main access log at a file specific to this server and set the default error page for 50x-class error codes. Finally, for security reasons, I've limited the maximum response size to avoid attempts to overload the server.

Just below the basic HTTP configuration, you'll see the first rewrite rule. You're already familiar with rewrite rules from the Apache configuration; however, I think you'll agree that these are cleaner and easier to read. That first rewrite rule checks for the existence of a maintenance.html file and displays it (and only it) if it exists. This rule allows you to gracefully respond to your visitors while you are making changes requiring an application shutdown.

The location block allows nginx to set custom configuration options for different URLs. In this default configuration, I'm setting configuration options for the root (/) . The index directive tells nginx which file to load for requests like / or /foo/. Here I'll use the standbys index.htm and index.html.

Next you'll see a group of proxy_* directives that forward information about the client and spoof information about the host to help hide the nginx proxy from the Rails application. This way, Rails has all the information it would normally have if it were serving requests directly to the user from one of the Mongrel servers. The forwarded information includes the IP of the client and the hostname we want Rails to see (for example, www.brainspl.at instead of the internal address of our Mongrel server). This is important for the request objects to work properly.

The sections immediately after the proxy_* directives are the meat of the URL rewriting. The expires directive sets the Expires header for any URLs that match images, JavaScripts, or style sheets. This rule will make the client download these respective assets only once and then use their local cached versions for ten years from the first download. When Capistrano deploys Rails apps, Capistrano appends a time stamp to the URL so that clients will think they are new assets and download them again. This allows you to push changes to the same filename and properly invalidate the cache.

Next, if the requested filename exists on disk, just serve it directly, and then finalize the request by breaking out of the block. If the static file doesn't exist, Rails then checks for the requested filename with `.html` appended. In other words, it checks for a cached Rails view. So when a user requests a URL such as `/post/foo`, nginx will check for `/post/foo.html` and serve it directly instead of proxying to Rails for a dynamic page.

Finally, if none of the other rules matched, the config then proxies the request to one of the Mongrels defined in the upstream block.

Secure Connections

To use SSL with nginx, you use a configuration that matches the server block as shown earlier but with the following differences:

- The secure HTTPS/SSL server will normally listen on port 443.
- SSL needs to be enabled.
- You need to create secure certificate and private key files and put them in the appropriate directories, just as we did with Apache.
- You need to forward one more header to ensure Rails knows when we have a secure connection.

You can put the configuration in another configuration file called `brain-spl.cf.ssl.conf`. Remember to consider putting the upstream block from the non-SSL configuration into its own file and include it in the nginx. You can add the relevant lines like this:

```
server {
    listen 443;
    ssl on;
    # path to your certificate
    ssl_certificate /etc/nginx/certs/server.crt;
    # path to your ssl key
    ssl_certificate_key /etc/nginx/certs/server.key;

    # put the rest of your server configuration here.

    location / {
        # set X-FORWARDED_PROTO so ssl_requirement plugin works
        proxy_set_header X-FORWARDED_PROTO https;

        # standard rails+mongrel configuration goes here.
    }
}
```

Notice I didn't define the Mongrel cluster again. I can use the same one.

Taking It to the Next Level

You can get more life out of your web tier by first introducing hardware load balancing to replace the Apache-based load balancer you built earlier. Hardware load balancers offer many of the same features plus more, including enhanced security, proxying HTTPS/SSL requests, and server affinity (sticky load balancing).

Another excellent enhancement is to offload serving of large static content from your own web servers and instead employ a content delivery service. These services will cache images, videos, music, PDF files, and any other large files that you need not bother your own servers with. It doesn't make your application any faster, of course, but it certainly will reduce the load on your web server's network, memory, and disks.

7.8 Clustering MySQL

I've shown how you might cluster multiple web and application servers behind a software load balancer, but a single database on the back end can take you only so far. The database would be thrashed severely if you had ten servers all vying for its time and resources, so you need some solution to allow for multiple databases in your application infrastructure. I should warn you that you must customize clustering solutions to fit the application that you are building, considering carefully the balance of performance against data integrity concerns.

The Challenges with MySQL Clustering

In this book, I've chosen MySQL because it is by far the most common and best supported database for Rails applications. Truth be told, for the most extreme scalability problems, there are better databases on the market that offer more powerful clustering features. As it turns out, MySQL is actually not a very good candidate for clustering at all, because of some challenges.

Challenge 1: The Relational Database

MySQL is a relational database. Relational databases do not scale well to super-high loads like those experienced by Google and Facebook. Instead, such sites will often use simpler, faster systems such as the Oracle Berkeley DB, which is an in-process nonrelational data storage solution that offers far better performance and stability, even in a distributed environment. Others may use in-memory object-oriented databases or even flat files! Each of these has their pros and cons, but

the relational database can actually be among the slower options, often favoring features over performance.²

Challenge 2: Asynchronous vs. Synchronous Replication

MySQL supports only asynchronous replication. Under this scaling model, you will have a lag between the time a transaction completes on one of the databases and when MySQL replicates that row to all the others in the cluster. This lag time can cause you pain when you are dealing with unique indexes such as the primary key. It's especially challenging with other unique indexes. Say that a given user must have a unique login. If two users took the same name at the same time, you'd have inconsistent data. The only solution is often your own custom algorithm for guaranteeing uniqueness. A few ambitious developers have formed projects to implement a synchronous clustering solution for MySQL, one that would eliminate the time-lag problem. One such project called `google-mysql-tools` includes a feature called `SemiSyncReplication`. Another is `solidDB` for MySQL, by Solid Information Technology. It also offers synchronous replication and other high-availability features. If you're serious about clustering MySQL, you should watch these projects.

Challenge 3: Clustering vs. Sharding

Clustering in general doesn't perform well enough for the most extreme database loads. Even if you do manage to get a synchronous cluster set up, certain kinds of transactions must update all the databases before completing. This limitation means that if you have ten database servers in your synchronous cluster and update a number of records that are centrally dependent to your system, your transaction will need to write to all ten servers! Your database cluster can easily become more of a hindrance than a help. Furthermore, it's hard to cluster in a geographically diverse way, so it becomes difficult to put one server in Japan and another in Canada and have them belong to a cluster. The performance implications of synchronizing a database across a wide network is not at all practical, regardless of the other benefits. So as an alternative to clustering, many modern high-load websites use an approach called *sharding*.

Sharding means splitting your database up into groupings of cohesive data, such that all the data that a certain user or function requires

2. See <http://www.oracle.com/database/berkeley-db/index.html> for more.

is colocated in one database, and data for other users or functions is stored in another database. For example, you might choose to store all the users whose names start with A–L in one database and M–Z in another. Or, you may choose to keep records based on geography, so you could store Japanese records in a database in Japan and Canadian records in a database located in Canada. Perhaps you can easily organize your database by data and time: a news site may store the most recent articles on one server and older archived ones on another. Sharding is highly application dependent, so I can't really do a good job of discussing approaches in a generic way within the scope of this book. You can imagine how complex this may make your application, though.

Challenge 4: The Official MySQL Cluster Is Limited

So far I've been using the term *cluster* in a pretty generic sense and will continue to do so because it's simply the best word to use for this situation. However, MySQL does distinguish between replication and clustering, and they're right to do so. In this book, the way that we implement the cluster is through MySQL replication features. Recall that the replication features are asynchronous and are not really meant to be used to create a cluster. Unfortunately, the fact is that the official MySQL cluster will not satisfy the requirements for most projects because of a number of limitations. As we'll soon see, MySQL replication simply works better to create a “poor man's cluster.”

The official MySQL cluster feature uses a different data store called NDB. Like ISAM and InnoDB, NDB changes the way MySQL works and has its own advantages and disadvantages. Unfortunately for most people, the disadvantages and limitations will significantly outweigh the advantages. In my opinion, NDB borderlines on useless for most applications. If one of the replication approaches presented here doesn't work for you, then you're far better off seeking a commercial synchronous clustering/replication technology for MySQL. It is possible you might need to seek out a different RDBMS altogether. For more about the limitations of the NDB data store, see <http://dev.mysql.com/doc/refman/4.1/en/mysql-cluster-limitations.html>.

As you may be thinking by now, a scale-up approach for the database may be an easier solution. After all, you can buy a monstrous database server with sixteen cores, 16GB of RAM, four independent network interfaces, sixteen SCSI drives, and a RAID controller with a battery backup and 64MB of cache RAM. But that sounds expensive, and this

is not a hardware book! So, pretend that you're a start-up with a Rails application experiencing medium to high load and that you have made an informed decision to cluster your MySQL database despite these challenges.

Separating Reads and Writes

The first approach to scaling out your database would be to separate the reads from the writes. MySQL has decent support for this model through its master/slave replication. The idea here is that all data is written to one of the single databases, the master, while all data reads occur on the slave. This strategy lets you optimize the databases more specifically for read or write performance and split the database up on to separate servers.

Configuring MySQL Master/Slave Replication

I have kind of a conservative nature, so I don't like to mess around with existing data too much. So, regardless of whether I have an existing database, I take the same approach to introducing the master/slave configuration to my environment. I will take the time to build a new master and slave virtual server from scratch. I find it less risky because I can work offline and less problematic because I am not balancing between old and new configurations. Once I've prepared the new master/slave servers, it's simply a task of dumping your data from the old database and uploading to the new one. Then, I can shut down the old server and introduce the new one into the environment. This approach may sound like you would have a lot of downtime, but really, you need to be down only for as long as it takes to dump the old data and import it into the new database. You won't have to rebuild your database infrastructure very often.

To set this up, you'll need two MySQL 5.0+ database servers, on separate virtual machines. The first thing you'll need to do is give each of your servers an identity. On the master machine, open `/etc/my.cnf`, and add the following two lines to the `[mysqld]` section:

```
# /etc/my.cnf on MASTER
# These lines added below the [mysqld] section
log-bin=mysql-bin
server-id=1
```

The first line, `log-bin`, tells MySQL to log activity in a binary format file using the prefix specified on the right side of the assignment. This binary logging needs to be done only on the master, and it's what the

slave will read from when replicating data. The second line, `server-id`, is a unique identifier for the server, in this case, 1. Restart the master server using this:

```
# Restart MySQL -- My conservative nature leads
# me to avoid restart scripts for major changes.
/etc/init.d/mysqld stop
/etc/init.d/mysqld start
```

Next, set up the slave, which is even easier. You don't need to use the binary logging on the slave. Add the server ID to the slave, choosing a different ID, of course, and then restart the slave as you did the master:

```
# /etc/my.cnf on SLAVE
# Following line added below the [mysqld] section
server-id=2
```

You should now log into the master server as root and query the replication status using `SHOW MASTER STATUS`, which produces output like the following. The important bits to note are the file and the position. You'll need those to configure the slave.

```
mysql> # ON MASTER;
mysql> SHOW MASTER STATUS\G;
***** 1. row *****
      File: mysql-bin.000001
      Position: 98
      Binlog_Do_DB:
      Binlog_Ignore_DB:
1 row in set (0.00 sec)
```

Now log into the slave and set the master using `CHANGE MASTER TO`. I usually use the same user as my Rails app, because it would normally have all the necessary permissions (`ALL PRIVILEGES`). You'll need to grant privileges to the remote user, though (for example, `'deploy'@'10.0.0.3'`). Notice that I used the name of the file and position that I retrieved from the master server in the previous step.

```
mysql> # ON SLAVE;
mysql> CHANGE MASTER TO
-> MASTER_HOST='10.0.0.3',
-> MASTER_USER='deploy',
-> MASTER_PASSWORD='deploypassword',
-> MASTER_LOG_FILE='mysql-bin.000001',
-> MASTER_LOG_POS=98;
Query OK, 0 rows affected (0.04 sec)
```

You can now start the slave by using the `START SLAVE` command and stop it using `STOP SLAVE`. Stopping is more like pausing: when you start it up again, MySQL will catch up on anything it missed while it was stopped.

It can be frustrating if you make a mistake, which is another reason why I start with a fresh server. If you make a mistake and somehow the servers get out of sync and become deadlocked, you can start over. Simply use `RESET MASTER` and `RESET SLAVE`. The slave should be stopped, before resetting them. You should requery the master status with `SHOW MASTER STATUS` and rerun `CHANGE MASTER TO` to reconfigure the slave before restarting it. It's a worthwhile exercise to tinker around with this on a couple of test database instances and make mistakes on purpose to see how to get yourself out of them. If you have data to import, you can simply run your dump script against the master once everything is set up correctly. The slave should replicate all the imported data, assuming it's all set up correctly.

You can also set up multiple read-only databases. If your application is far heavier on reads than writes, then you may want more than one read-only database. The cool thing is that adding more read-only slaves can be a simple matter of stopping the slave temporarily, copying the slave virtual machine, and of course configuring the machine's identity. Recall that this includes the hostname, the IP address, and also the MySQL server ID! Don't forget that. You can then start up the slaves again, and the new one will pick up as if it had always been there.

To test your configuration, connect to the master server, create a database, create a table, and write a row or two to it. Then log onto the slave server to see whether the changes were replicated.

Configuring Your Rails Application

Now that you have two databases, one for writing and one for reading, you need to tell Rails how to use them. Unfortunately, Rails does not support this out of the box. So, you can write something yourself to override the finders and which database they can connect to, or you can search for something that someone else has already built.

I did, and I found something I really like `acts_as_readonlyable` (yes, that's the name). You can find it at the longest URL I've ever had to put in a book (but Google works too): <http://revolutiononrails.blogspot.com/2007/04/plugin-release-actsasreadonlyable.html>

Names aside, `acts_as_readonlyable` uses a very clean syntax and simple configuration for dealing with separate read and write databases. Follow the instructions on the website for installation. At the time of this writing, it was simply a script/plugin install with their most current release tag in their Subversion repository.

Once it's installed, you can configure additional read-only databases in your `database.yml` file:

```
production:
  database: my_app_master
  host: master_host

read_only_a:
  database: my_app_slave
  host: slave-a

read_only_b:
  database: my_app_slave
  host: slave-b
```

Applying the plug-in to your model classes is straightforward, and when you do so, your finders will behave differently. They will use the read-only databases specified in the parameter of the declaration. So, for example:

```
class Product < ActiveRecord::Base
  acts_as_readonlyable [:read_only_a, :read_only_b]
end
```

Here I've chosen to use two read-only databases. However, I think we can do one better. We can use this approach to achieve a sort of “poor man's sharding,” by simply being selective about which read-only database is used by each model. For example:

```
# partial database.yml
#...
read_only_products:
  database: my_app_slave
  host: slave-products
read_only_articles:
  database: my_app_slave
  host: slave-articles

# product.rb
#...
class Product < ActiveRecord::Base
  acts_as_readonlyable [:read_only_products]
end

# article.rb
#...
class Article < ActiveRecord::Base
  acts_as_readonlyable [:read_only_article]
end
```

You can also get a little extreme and just apply the plug-in to all your model classes and cross your fingers, like this:

```
# environment.rb
# not recommended...
class << ActiveRecord::Base

  def read_only_inherited(child)
    child.acts_as_readonlyable :read_only
    ar_inherited(child)
  end

  alias_method :ar_inherited, :inherited
  alias_method :inherited, :read_only_inherited

end
```

I highly recommend against this. Because of the asynchronous replication in MySQL, there will be certain data you'll always want to read from the master database. Rails sessions are a good example of where lag between the write and read may create instability in your application. Also, beware of anything to do with money!

You've seen how to enjoy multiple read-only databases but are still constrained by being able to write to a single database only. It's time to enable two read/write databases.

Multimaster, Read/Write Clustering

The advantages to having two or more databases that accept writes are mostly stability and redundancy. Performance isn't greatly improved, because eventually the data does have to be written to each database in the cluster. But if you lose a server to a catastrophic failure, you can rest assured that your data will be mostly intact. I say "mostly" again because of the asynchronous replication. There is still a slight chance that data will be lost in a crash, before it can propagate throughout the cluster.

Now that we'll be reading and writing to the cluster, the challenges of asynchronous replication is doubled. Not only do we have to worry that the data may not be there when reading, but we also have to worry that it might already be there upon writing! If somehow a duplicate value was written to the same primary key column in two databases within the cluster, we'd have a real problem. MySQL allows us to configure offsets to keep autogenerated primary keys unique. Server 1 could have odd keys, and server 2 could have even keys, for example. But if you

have any other unique indices on your tables, you will have to find your own solution for preventing conflicts.

Configuring the Asynchronous Multimaster MySQL Cluster

The configuration doesn't look much harder, but it can definitely be frustrating initially. So if you're going to try this, definitely bring a full bag of patience. Since you're already familiar with the `my.cnf` file, I'll spare you some time and tackle both master configurations in one shot. The following configuration files have comments identifying each server:

```
# /etc/my.cnf on FIRST MASTER
# These lines added below the [mysqld] section
server-id=1
log-bin=mysql-bin
log-slave-updates
replicate-same-server-id=0
auto_increment_increment=10
auto_increment_offset=1

# /etc/my.cnf on SECOND MASTER
# These lines added below the [mysqld] section
server-id=2
log-bin=mysql-bin
log-slave-updates
replicate-same-server-id=0
auto_increment_increment=10
auto_increment_offset=2
```

Notice the differences compared to the master/slave configuration we discussed before. Of course, you still need the `server-id` to identify each server. The first difference, though, is that both servers now use `log-bin` to enable binary logging. Each server will produce its own binary log and read the binary log from the other server. The log files allow each server to pick up the writes from the other server. It's the same concept as master/slave, but done twice over. You're using the same file prefix for the binary log files, but you can use whatever you like. The server name works perfectly well.

The `log-slave-updates` option ensures that if you chain more than one slave together in a circular arrangement, MySQL will forward along all updates received from other servers. Since you don't want to send the same update around in an infinite replication loop, the next option, `replicate-same-server-id`, tells a server to ignore its own updates.

Finally, the last two lines of each file help MySQL deal with asynchronous autoincrement key generation. The first, `auto_increment_increment`,

tells MySQL to increment autoincrement fields by ten each time, essentially dividing the total number of possible keys a server can generate by ten. The `auto_increment_offset` command is basically added to the increment. By making this offset different for each server, you will avoid key collisions. The first master will generate keys such as 1, 11, 21, and 31, and the second master will generate keys like 2, 12, 22, and 32. Having an increment level of 10 basically leaves room in the keyspace for ten servers in your cluster. You can tune it higher or lower depending on the number of servers you expect to have, but I don't think introducing more than ten servers in an asynchronous cluster is practical. In fact, I probably wouldn't do more than two or three and would favor a hardware solution or replacing MySQL with a more capable clustered database solution.

The remainder of the configuration is the same as for the master/slave setup, but doubled up. As before, execute `SHOW MASTER STATUS`, but on each server. Take the values from each master, and use them in the appropriate file and position parameters of the `CHANGE MASTER TO` statement, on each slave. Then, use `START SLAVE` on both servers to bind them to each other. Refer to these steps in the earlier master/slave discussion for more details.

Testing your work is pretty straightforward. Create a database and some tables, and insert some rows on each server to ensure that MySQL updates both databases. It's pretty cool when you get it up and running. However, as you'll see in the next section, it's not all sunshine and roses.

Configuring Your Application for the Multimaster Cluster

The good news about a multimaster, read/write cluster is that you may not have to change your application at all. You won't need any plug-ins or special software. Your application sees a fully functional database and is unaware of the cluster. This transparency is nice, especially compared to handling the clustering by hand. But remember, being explicit with each update has advantages too, along the lines of the sharding solutions I presented earlier.

The multimaster approach has its own challenges, serious challenges indeed. Again, because of the asynchronous nature of the replication, you really have to be careful when you write sensitive data. In addition, you have to be aware of situations where a single user may make multiple requests in rapid succession, perhaps without even knowing it.

One of my favorite web application patterns is the Redirect-After-Post pattern. Posting is annoying because when the user hits the Back button in their browser, they get prompted to resend the data. However, if you redirect them after they post a form of data, their Back button behaves nicely, and their overall experience is improved. However, this pattern results in a very quick update to the database in one request and then a subsequent read within a second or two from the redirected request. Often, the very next request will query for the data that you just wrote.

In the case of a multimaster cluster, if the user posts to one server and is then redirected to a query for the same data on another server, that data may not have been written yet! This inconsistency could cause random instability in your site that's hard to track down. So when you use a multimaster cluster, use sticky load balancing to ensure that a given user remains on the same server for the duration of their browser session. Sticky balancing is not the best performing solution, but I'll always choose stability over performance.

Most web servers and hardware load balancers offer support for sticky load balancing. With Apache, the configuration is simple. Recall the Apache cluster definition from our software load balancer solution earlier in this chapter. It looked like the following, but we've made some changes:

```
# cluster.conf
<Proxy balancer://mycluster> lbmethod=byrequests stickysession=BALANCEID
    BalancerMember http://10.0.0.102:80 route=www1
    BalancerMember http://10.0.0.103:80 route=www2
</Proxy>
```

Did you spot the changes? In the first line I added `lbmethod` to tell the balancer to load balance every request, alternating the members between them. However, the `stickysession` option overrides the default behavior if it finds a cookie called `BALANCEID` with a valid route value. If the value of `BALANCEID` matches any of the route values of any balancer members, then it will ensure to balance only among balancer members with the same value. It basically locks a user's browser session into a specific balancer member or group of balancer members (yes, multiple balancer members can have the same route value).

You're not quite done yet, though. Your software load balancer itself does not set the cookie, so you need to ask your web servers to do that for you.

Luckily, it's a one-liner, an ugly line, but one line nevertheless:

```
# Partial mongrel_proxy.conf
# on 10.0.0.102
#...
RewriteEngine On
RewriteRule .* - [CO=BALANCEID:balancer.www1:.brainspl.at]

# Partial mongrel_proxy.conf
# on 10.0.0.103
#...
RewriteEngine On
RewriteRule .* - [CO=BALANCEID:balancer.www2:.brainspl.at]
```

Writing the cookie makes use of the rewrite engine, as you should recall from our earlier Apache discussions. The cookie value is `balancer.www1`, where the `www1` matches the route of the appropriate balancer member. Note that we set the domain explicitly to `.brainspl.at` so that the cookie can be read, written, or overwritten from any server on our domain.

Combining the Approaches

There just isn't any pleasing some people, so you may want the redundancy and failover capabilities of a multimaster cluster, as well as the performance of read-only databases in master/slave configuration. This is entirely possible. However, you will be inheriting not only the benefits of both, but also the challenges of both. Getting a configuration like this right will take time, patience, and some documentation on your part. Don't build something like this and expect everyone to understand it at a glance. So, draw a picture of your environment, and include some high-level documentation.

I won't go through the step-by-step configuration details all over again, because they're the same as they were earlier. Essentially, what you'll do is build a multimaster cluster with sticky load balancing. But each balancer route will lead to an set of application and database servers that includes one master database server from the master cluster and a number of read-only slave servers dedicated to that master server in particular.

Don't forget that in addition to the sticky load balancing, you will also have to use the `acts_as_readonlyable` plug-in or a similar solution to handle the read-only databases. If you follow all the rules, you shouldn't get bitten by the asynchronous bug too hard or too often. If your environment is getting this complex, then you might want to seriously start

considering an alternative to MySQL or perhaps do away with the relational database entirely.

7.9 Summary

If I haven't exhausted the subject of scaling out, then at the very least I must have exhausted you. In this chapter, I gave you a number of tools to build convincingly high-performance infrastructure for Ruby on Rails. You learned to configure A records and CNAMEs for a cluster. Then, you learned to dabble in virtualized servers with VMware and Parallels. You also learned to deploy to those virtual servers with Capistrano.

Next, you learned to build both Apache and nginx servers to serve as load balancers, secured servers, and static proxies. Apache demonstrated its flexibility and modularity as a Mongrel proxy and load balancer. For those interested in simplicity and performance, nginx shines brightly. With some better documentation and a few more battle scars, nginx looks like it could become a popular alternative to Apache and possibly the new king of lightweight web servers.

Finally, I tackled one of the more daunting tasks of Rails deployments: clustering a MySQL database. Although there are more powerful databases for clustering, MySQL ultimately handles the job effectively, if not gracefully. I'm happy to have MySQL despite its shortcomings, because it makes up for them in spades in other areas, including community and Rails support. And you can't beat the price.

Before I move on, I should warn you that you can find books about most of the topics in this chapter. If you're a developer, I encourage you to explore each one more deeply if you're serious about deploying a massively scalable website. Stepping out of your developer shoes and dealing with operational tasks will grow you as a person and a developer. Or at the very least, you'll be a little nicer to your system administrator because of your new appreciation for the role. And if you're an admin, you can better understand the foundations of your deployment. I've really just scratched the surface.

In the next chapter, I'll dive into some basic performance topics. You'll learn how to benchmark and profile systems for performance. You'll also see some solutions to common Rails bottlenecks such as caching and eager loading.

Deploying on Windows

If you asked for a show of hands of how many people had ever deployed Rails on Windows at a Ruby conference, you would get almost no one to admit to that crime. The truth is something very different. Microsoft has sold a bunch of copies of Windows to someone, and many companies and educational institutions simply don't have access to other platforms for deployment. For many companies, bringing in a Linux-based server isn't an option because of politics, a lack of experience, or the perceptions of management. If you are deploying small departmental applications in such a company, Windows may be your best bet.

This chapter explores a few strategies that you can use to get a Rails application deployed within a Windows server environment. I've used each one of these methods at various times to serve applications to various audiences. I'll cover using single instances of Mongrel, load balancing with Pen or Apache, and finally, a strategy to integrate Rails apps into an existing IIS web server using a special ISAPI filter and custom Rails plug-in.

8.1 Setting Up the Server

To serve Ruby on Rails applications in our Windows environment, you need to do a few things to get your machine ready. You have to install Ruby, Gems, and Rails, as well as Subversion. I'll also demonstrate how to get your Rails application talking to a Microsoft SQL Server.

Installing Ruby on Rails

Getting Ruby, Gems, and Rails on a Windows server is extremely easy thanks to the work done by Curt Hibbs. His One-Click Ruby Installer package makes installing Ruby and Gems painless.

Just do the following:

1. Download the One-Click Ruby Installer from RubyForge.¹ Download version 1.8.6 or higher, because previous versions had issues with security and lacked proper debugging support.
2. Double-click the One-Click Ruby Installer to install the package, and accept all the default settings.
3. Open a command prompt, and run the following command:

```
C:\>gem install rails --no-rdoc --no-ri
Successfully installed rake-0.8.1
Successfully installed activsupport-2.0.2
Successfully installed activerecord-2.0.2
Successfully installed actionpack-2.0.2
Successfully installed actionmailer-2.0.2
Successfully installed activereource-2.0.2
Successfully installed rails-2.0.2
```

The `gem install rails` command installs the latest version of Rails on your system. As before, we'll skip the documentation for our server installation with the `--no-rdoc` and `--no-ri` flags. Next, I'll show you how to install Subversion.

Installing Subversion

You will need to have the Subversion client tools installed on your machine in order to install the necessary Rails plug-ins. If you use Subversion to manage your projects, you can easily copy your applications to your production server. You can find a handy Windows installation of Subversion at Tigris.² Download the most recent Windows installer.

The Subversion installation alters your `PATH` environment variable to include the path of the Subversion executables. You do not have to restart your machine for these path changes to take effect, but you will need to close any open command windows.

Configuring Ruby on Rails to Use Microsoft SQL Server

Microsoft SQL Server doesn't work with Rails without some tweaking. You will have to take a few minor steps to establish a successful connection. If you don't plan to use SQL Server with your Rails applications, you can safely skip this section.

1. <http://rubyforge.org/projects/rubyinstaller/>

2. <http://subversion.tigris.org/servlets/ProjectDocumentList?folderID=91>

Virtualization to the Rescue...Again?

If you have worked with Ruby on Windows before, even just for development, you know that it's slow. Very, very slow. On Windows Vista, based on my own personal (daily) experience, it is even slower. Simply running unit tests can be orders of magnitude slower than running the same tests on Linux. Believe it or not, it's so slow that it might be faster to run your Rails applications in a virtual Linux machine on Windows using VMware Server or similar software. Modern virtualization software combined with multicore CPUs has made virtualization extremely fast. Thus, Rails on Linux, on VMware, and on Windows should actually perform quite well. The only way to know for sure is to try it for yourself. Build a simple Rails-capable virtual Linux server with VMware, and run your unit tests (see Chapter 7, *Scaling Out*, on page 144). Compare it against the time it takes to run the tests on Windows natively. If you see a huge difference, then try performing some load tests (see Chapter 9, *Performance*, on page 224) against your application to see whether it's truly faster running on a virtual machine.

Performance isn't the only benefit of running in a virtual machine. Recall our discussions from Chapter 7, *Scaling Out*, on page 144, about how virtualization simplifies a great number of deployment issues and can help you scale out faster.

I can think of only one good reason why virtualization may not be a practical choice for your Rails application: integration. If your Rails application needs to integrate with native Windows services or other applications that would not be accessible from within a virtual machine, then the rest of this chapter will become very important to you.



Joe Asks...

What About InstantRails, Apache, and FastCGI?

I won't discuss InstantRails, a popular and easy way to get started with Rails development on Windows, in this chapter because it's really not meant to be a production deployment solution. Some people claim to have deployed applications with it to varying degrees of success, but the lack of load balancing and the inability to run as a service disqualify it as a good solution.

I also won't discuss the setup of Apache and FastCGI in this chapter. There are many issues with using this method on Windows including random server errors, poor performance, and really long start-up times for Apache.

I'll stick to the deployment options that will give you the best possible chance of success.

1. Download the latest stable version of Ruby-DBI.³ Look for a file with the name `dbi-0.1.0.tar.gz` or something similar. Extract this file to a temporary location like `C:\TEMP`.
2. Grab one file from that archive called `ADO.rb`. If you have extracted the files to `C:\TEMP`, you can find the file in the folder `C:\TEMP\lib\dbd`.
3. Copy this file to `C:\ruby\lib\ruby\site_ruby\1.8\DBD\ADO`. You will need to create the ADO folder, because it won't exist.
4. Please see the Rails wiki⁴ for more information on using SQL Server with your Rails applications.⁵

While Microsoft SQL Server is a common database for the Microsoft platform, it's not the only popular choice. You can also use several of the popular open source databases with Rails, including MySQL, SQLite, and Oracle.

3. <http://rubyforge.org/projects/ruby-dbi/>

4. <http://wiki.rubyonrails.org/rails/pages/HowtoConnectToMicrosoftSQLServer>

5. You can also use ODBC DSNs to connect to SQL Server from Rails, but there are some tricky permissions issues with ODBC and Mongrel as a service, so I don't typically recommend going that route.

MySQL on Windows

If you intend to use MySQL instead of SQL Server, you'll be happy to know you can do so easily. I'm going to assume you already have MySQL installed and working. Rails has built-in support for MySQL, but to avoid potential problems such as speed and performance, you'll need to install the MySQL/Ruby for Windows adapter. You will see better performance when using this C-based library instead of the pure-Ruby library. Until recently, installing MySQL/Ruby was a pain, but the gem now comes complete with a binary version for Windows. Installing it is as simple as opening a command prompt and installing the gem:

```
C:\>gem install mysql
Bulk updating Gem source index for: http://gems.rubyforge.org
Select which gem to install for your platform (i386-mswin32)
 1. mysql 2.7.3 (mswin32)
 2. mysql 2.7.1 (mswin32)
 3. mysql 2.7 (ruby)
 4. mysql 2.6 (ruby)
 5. Skip this gem
 6. Cancel installation
> 1
Successfully installed mysql-2.7.3-mswin32
Installing ri documentation for mysql-2.7.3-mswin32...
Installing RDoc documentation for mysql-2.7.3-mswin32...
While generating documentation for mysql-2.7.3-mswin32
... MESSAGE:  Unhandled special: Special: type=17, text="<!-- $Id: README.html,
v 1.20 2006-12-20 05:31:52 tommy Exp $ -->"
... RDOC args: --op c:/ruby/lib/ruby/gems/1.8/doc/mysql-2.7.3-mswin32/rdoc --exc
lude ext --main README --quiet ext README docs/README.html
(continuing with the rest of the installation)
```

Be sure to select the highest-numbered version for Windows.⁶ That's really all there is to it. You have the prerequisites installed. It's time to turn your attention to the server you'll use to serve your Rails application. I'll first show you Mongrel and then a few tricks you can use to enhance the installation.

8.2 Mongrel

As with *nix platforms, if you're running Ruby applications, Mongrel is usually the way to go. Not only is Mongrel relatively fast, but it's also extremely easy to install and use. You can install the Windows version of Mongrel as a Windows service. There's no `mongrel_cluster` for Windows yet, but don't worry. I will show you how to manually build a cluster of Mongrels.

6. Future versions of RubyGems will automatically install the correct version for you.

Installing Mongrel

Installing Mongrel on Windows is easy. Open a command prompt, and install Mongrel with the gem command. Choose the highest-numbered Win32 option.⁷ The latest version is always at the top of the list, so pay close attention to both the version number and the platform, like this:

```
C:\>gem install mongrel --include-dependencies
Select which gem to install for your platform (i386-mswin32)
1. mongrel 1.1.1 (ruby)
2. mongrel 1.1.1 (jruby)
3. mongrel 1.1.1 (mswin32)
4. mongrel 1.1 (mswin32)
5. mongrel 1.1 (ruby)
6. mongrel 1.1 (jruby)
7. Skip this gem
8. Cancel installation
> 3
Successfully installed mongrel-1.1.1-mswin32
Successfully installed gem_plugin-0.2.2
Successfully installed cgi_multipart_eof_fix-2.3
Installing ri documentation for mongrel-1.0.1-mswin32...
Installing ri documentation for gem_plugin-0.2.2...
Installing ri documentation for cgi_multipart_eof_fix-2.3...
Installing RDoc documentation for mongrel-1.0.1-mswin32...
Installing RDoc documentation for gem_plugin-0.2.2...
Installing RDoc documentation for cgi_multipart_eof_fix-2.3...
```

Next, install the Mongrel Service plug-in. This plug-in provides the necessary commands to get Mongrel installed and running as a Windows service. To do so, just run the following command:

```
C:\>gem install mongrel_service --include-dependencies
Select which gem to install for your platform (i386-mswin32)
1. mongrel_service 0.3.3 (mswin32)
2. mongrel_service 0.3.2 (mswin32)
3. mongrel_service 0.3.1 (mswin32)
4. mongrel_service 0.1 (ruby)
5. Skip this gem
6. Cancel installation
> 1
Select which gem to install for your platform (i386-mswin32)
1. win32-service 0.5.2 (ruby)
2. win32-service 0.5.2 (mswin32)
3. Skip this gem
4. Cancel installation
> 2
Successfully installed mongrel_service-0.3.3-mswin32
Successfully installed win32-service-0.5.2-mswin32
```

7. RubyGems version 0.9.5 lets you skip the platform selection step.

```
Installing ri documentation for mongrel_service-0.3.2-mswin32...
Installing ri documentation for win32-service-0.5.2-mswin32...
Installing RDoc documentation for mongrel_service-0.3.2-mswin32...
Installing RDoc documentation for win32-service-0.5.2-mswin32...
```

Watch closely for the gem for the win32-service file. The *win32* version is not always at the top of the list like it is for *mongrel_service*. Whenever installing gems, always take note of the version number and the platform to make sure you get the right version; the *ruby* ones won't install on Windows when you're using the One-Click Ruby Installer's Ruby interpreter.

Test Mongrel

Now that you've installed Mongrel, you should test it against your application to ensure that Mongrel can serve pages. I typically test Mongrel like this:

1. Create a folder on your hard drive called `c:\web`.
2. Open the command prompt, and navigate to `c:\web`.
3. Create a new Rails application in that folder:

```
C:\web>rails mytestapp
create
create  app/controllers
create  app/helpers
create  app/models
create  app/views/layouts
create  config/environments
...
create  doc/README_FOR_APP
create  log/server.log
create  log/production.log
create  log/development.log
create  log/test.log
```

If you have a working Rails application you want to try, you should place that in a subfolder of `c:\web` and then reference that path in all future steps. Also, make sure the database configuration for the production environment is correct before proceeding. Review `config/database.yml` to ensure that your production database is defined properly.

To test your application, execute the following command:

```
C:\web\mytestapp>mongrel_rails start -e production -p 4001
** Starting Mongrel listening at 0.0.0.0:4001
** Starting Rails with production environment...
```

```

** Rails loaded.
** Loading any Rails specific GemPlugins
** Signals ready. INT => stop (no restart).
** Mongrel available at 0.0.0.0:4001

```

This command starts Mongrel on port 4001. Navigate to <http://localhost:4001>, and make sure that your application works before continuing.

If you do not get a response, make sure port 4001 is not being blocked by Windows Firewall or by your router.

Once you know your application works in production mode, stop the server with `Ctrl+C`.

Install Mongrel as a Windows Service

Now that you know your application works and that you have Mongrel installed correctly, you can install your application as a Windows service. You'll install this application using production mode, so make sure your `database.yml` file points to a working production database if you're using your own application with this tutorial.

1. Stop Mongrel by pressing `Ctrl+C`.
2. Execute the following command in order to install the application as a service:

```

C:\web\mytestapp>
  mongrel_rails service::install -N MyTestApp_4001 -p 4001 -e production

** Copying native mongrel_service executable...
Mongrel service 'MyTestApp_4001' installed as 'MyTestApp_4001'.

```

This command creates a new Windows service with the name `MyTestApp_4001`, which you can view in the Control Panel Services applet, as shown in Figure 8.1, on the following page.

3. You can start the service from the Services applet or from the command line by executing the following command: `mongrel_rails service::start -N MyTestApp_4001`.
 - To stop the service from the command line, use `mongrel_rails service::stop -N MyTestApp_4001`.
 - Later, you can remove the service at any time using `mongrel_rails service::remove -N MyTestApp_4001`.

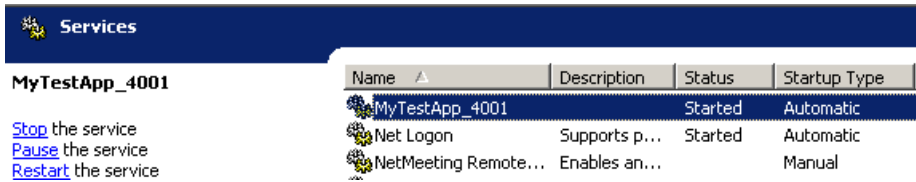


Figure 8.1: Mongrel as a Windows service in the Services applet

Adding the port number to the service name is a really helpful way to keep track of the ports you've used. As you add services, the port number becomes even more useful. It's not a requirement, but it's a good convention to follow.

Creating a Second Instance of Mongrel for Your Application

Your application is now hosted by Mongrel, running as a service. Now, it's time to kick up your feet and pop open a tall frosty one, right? Be careful, though. One Mongrel is not likely enough. Rails is not always the fastest available framework, and a single instance of Mongrel can handle only one request at a time. As load increases, you need to add more instances of Mongrel and then balance the requests.

Those lucky *nix guys get to use a tool called `mongrel_cluster`, which can start and stop multiple instances of Mongrel with ease. Windows doesn't have `mongrel_cluster` yet, so you'll need to improvise. You can just create another instance of Mongrel as a service that points to the same Rails application. You can then use a load balancer to distribute traffic to each instance.

Creating your custom cluster manually is not as hard as it sounds. You'll create another service that points to the same application, but this time use port 4002 by running the following commands:

```
mongrel_rails service::install -N MyTestApp_4002 -p 4002 -e production
mongrel_rails service::start -N MyTestApp_4002
```

If you look in the Control Panel under Services, you will see both services running. Adding the port number to the service name makes it easier to remember which port each service uses. If you look at Figure 8.2, on the next page, you will see an example of both services installed.

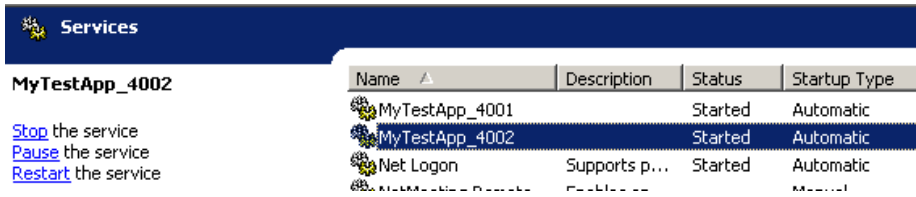


Figure 8.2: Both Mongrel instances as services

Keep in mind that these services aren't set to automatically start when you reboot the server, so your app isn't going to be available after a restart. Let's remedy that. Configure each service to start up automatically by right-clicking each service name and setting the start-up type to Automatic.

Test each address to make sure the requests work and that the services are in fact serving your web application. <http://localhost:4001> and <http://localhost:4002> should both be serving the same application.

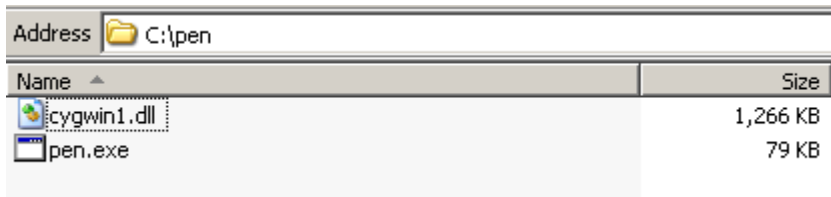
So, you have two instances of your application running on different ports. That's better than one, but the setup is not that useful yet; you need to load balance them, and you make that happen by using Pen or Apache.

8.3 Mongrel and Pen

Pen is a nice, simple way to load balance an application without having to do too much setup. Pen is great for small sites without a huge number of expected connections, and it's great because you don't have to spend a lot of time learning how to configure it. Pen handles reverse-proxying and balancing very well, but it isn't a web server, which means you can't serve static content with it. Your static content will be served by your back-end Mongrel services. For small apps with more than a couple of users, this setup should work just fine.

You can download a Windows binary of Pen from <ftp://siag.nu/pub/pen/pen-0.17.1.exe>.

Pen supports SSL, but its support is very experimental, so if you need to host a secure site, you'll have to use some sort of proxy server in front of this setup.



Address C:\pen	
Name	Size
cygwin1.dll	1,266 KB
pen.exe	79 KB

Figure 8.3: Required files to run Pen

Setting Up Pen

Create a folder to store Pen. `C:\pen` will do just fine. Save the file you just downloaded in this folder, and rename it to `pen.exe` so it's easier to call. To run Pen on Windows, you'll need to download the file `cygwin1.dll`⁸ and place it in `C:\pen`. The file is compressed, so unzip it first.

Figure 8.3 shows the files required to run Pen. Once you've downloaded both of them, you can give Pen a quick test, but first make sure your Rails app is running with Mongrel as described previously. Open a command window, and navigate to `C:\pen`. Execute the following command to start Pen:

```
pen -f 80 localhost:4001
```

This tells Pen to listen on port 80 and forward all requests to `localhost:4001`. If your Mongrel service is still running there, this command will make your application available on port 80.

Now open `http://localhost` in your browser, and you should see your Rails app. It's just that simple. The `-f` switch keeps Pen from going into the background. If you forget this switch, then you'll have to kill Pen using the Windows Task Manager.

Use `Ctrl` + `C` to stop Pen and return to the command prompt.

Load Balancing with Pen

Load balancing with Pen is as easy as adding each remote host and port to the command line. If you had two Mongrel instances running, one on port 4001 and the other on port 4002, you would use the following command:

```
pen -f 80 localhost:4001 localhost:4002
```

8. <http://www.dll-files.com/dllindex/dll-files.shtml?cygwin1>

Installing Pen as a Service

If you decide that Pen is right for you, you should install it as a service so you can have it automatically start just like your Mongrel services do. There's a relatively easy (and free) way to do that.

1. Download the Windows 2003 Server Resource Kit from Microsoft,⁹ and install it.
2. Open a command prompt, and run the following command:
`"C:\Program Files\Windows Resource Kits\Tools\instsrv.exe" Pen`
`"C:\Program Files\Windows Resource Kits\Tools\srvary.exe"`

The service was successfully added!

Make sure that you go into the Control Panel and use the Services applet to change the Account Name and Password that this newly installed service will use for its Security Context

The commands in the following list will create a new registry entry containing the configuration for your new service.

3. Open regedit, and locate the key HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Pen.
4. Create a new key beneath that key called Parameters.
5. Select the Parameters key, and create a new string value with the name Application. Enter c:\pen\pen.exe for the value.
6. Create another string value called AppParameters. Enter -f 4000 localhost:4001 localhost:4002 for the value.
7. Create a third string value called AppDirectory. Enter c:\pen for the value.
8. Close regedit, and open a command prompt.
9. Start the service by typing the following command:

```
C:\>net start pen
The Pen service is starting.
The Pen service was started successfully.
```

You can stop the Pen service just as easily:

```
C:\>net stop pen
```

The Pen service was stopped successfully.

That's it. This setup should work well for single applications that need to handle a lot of users. Though you see a lot of steps, they take only about fifteen minutes from beginning to end. If you decide that this

9. <http://www.microsoft.com/downloads/details.aspx?familyid=9d467a69-57ff-4ae7-96ee-b18c4790cffd>

method is not for you, you can remove the service with the command `sc delete pen`.

Before moving on, you should know that a single instance of Pen is going to work for only one Rails application. If you are trying to serve multiple Rails applications with Pen, you'll need to copy `pen.exe` to another file like `my_app_name_pen.exe` and then set up the service with a new name. You could end up with quite a few services if you're serving lots of apps.

So, Pen works great for small apps that need a bit of load balancing help, but what do you do when you have to handle a *lot* more requests? You're going to have to use what some Windows system administrators refer to as "the A word."

8.4 Using Apache 2.2 and Mongrel

If you need to handle load, there's no better solution on Windows than Apache 2.2. Not only can you load balance with relative ease, but you can also make Apache serve all the static content such as cached pages, CSS, JavaScript, and images. If you're taking advantage of page caching (and you should if you're doing a public site), then Apache is going to be your best bet for high performance.

Another great advantage of using this approach is that you can "borrow" a lot of configuration files from the *nix guys.

Install Apache

Download the Apache 2.2 Windows binary from Apache.¹⁰ Be sure to grab the latest release.

Install Apache 2.2 using the installer you downloaded.

The wizard should be pretty easy to handle. I'll just walk you through a few of the highlights. Most important, be careful when you pick a port. I usually choose to install Apache for a single user on port 8080 to prevent conflicts with IIS on port 80. I'll install the Windows service manually later. Also, make sure you don't install Apache as a web service, as shown in Figure 8.4, on the next page.

Install Apache to `c:\apache` or some other directory you can easily find later. The Apache configuration should complete without any problems.

10. <http://httpd.apache.org/download.cgi>

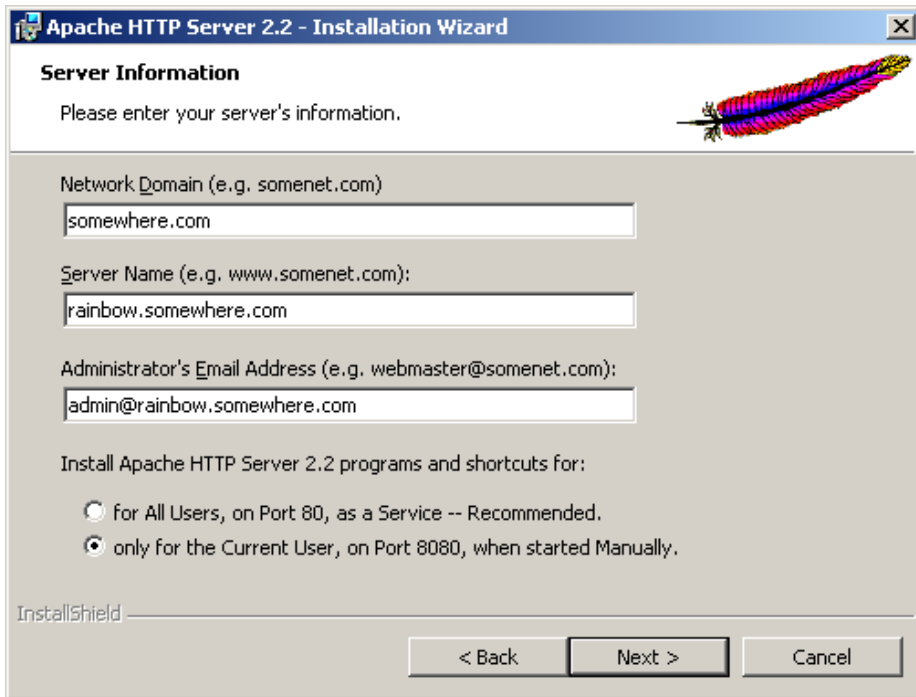


Figure 8.4: Ensure that you're not installing Apache as a service.

Configuring Apache to Serve Your Rails Applications

Apache uses the file `httpd.conf` to hold all the configuration settings. You know the drill. I'm not going to talk about them all, only the ones you will need to know for this Windows installation. You can always consult the excellent documentation to learn more. In fact, I recommend you familiarize yourself with the contents of that file before you roll out into production. Apache is big, it has lots of options, and you really want to make sure you don't have any gaping security holes.

Locate the `httpd.conf` file. It's in the folder `C:\apache\conf`.

First, locate the section of the file that starts with this:

```
# Dynamic Shared Object (DSO) Support
```

This section contains all the modules that can be loaded by Apache. Each hash mark (#) means that the line is commented out.

Uncomment the following lines to activate the proxy balancer:

```
LoadModule proxy_module modules/mod_proxy.so
LoadModule proxy_balancer_module modules/mod_proxy_balancer.so
LoadModule proxy_http_module modules/mod_proxy_http.so
```

You also need to enable URL-rewriting support by uncommenting this line:

```
LoadModule rewrite_module modules/mod_rewrite.so
```

Next, you'll want to enable the deflate module to allow your content to be compressed as it is served:

```
LoadModule deflate_module modules/mod_deflate.so
```

Finally, add this line to the bottom of the file:

```
Include conf/httpd-proxy.conf
```

This allows you to split up your configuration for your application into another file. At this point, you should save the httpd.conf configuration file. Create a new file in C:\Apache\Apache2.2\conf called httpd-proxy.conf with the following contents:

```
<VirtualHost *:8080>
    ServerName yourdomain.com
    DocumentRoot c:/web/mytestapp/public

    <Directory "c:/web/mytestapp/public">
        Options FollowSymLinks
        AllowOverride None
        Order allow,deny
        Allow from all
    </Directory>

    # Configure mongrel instances

    <Proxy balancer://mongrel_cluster>
        BalancerMember http://127.0.0.1:4001
        BalancerMember http://127.0.0.1:4002
    </Proxy>

    RewriteEngine On

    # Uncomment for rewrite debugging
    #RewriteLog logs/your_app_deflate_log deflate
    #RewriteLogLevel 9

    # Check for maintenance file and redirect all requests
    RewriteCond %{DOCUMENT_ROOT}/system/maintenance.html -f
    RewriteCond %{SCRIPT_FILENAME} !maintenance.html
    RewriteRule ^.*$ /system/maintenance.html [L]
```

```

# Rewrite index to check for static
RewriteRule ^/$ /index.html [QSA]

# Rewrite to check for Rails cached page
RewriteRule ^([^.]+)$ $1.html [QSA]

# Redirect all non-static requests to cluster
RewriteCond %{DOCUMENT_ROOT}/%{REQUEST_FILENAME} !-f
RewriteRule ^/(.*)$ balancer://mongrel_cluster%{REQUEST_URI} [P,QSA,L]

# Deflate
AddOutputFilterByType DEFLATE text/html text/plain text/xml
BrowserMatch ^Mozilla/4 gzip-only-text/html
BrowserMatch ^Mozilla/4\.0[678] no-gzip
BrowserMatch \bMSIE !no-gzip !gzip-only-text/html

# Uncomment for deflate debugging
#DeflateFilterNote Input input_info
#DeflateFilterNote Output output_info
#DeflateFilterNote Ratio ratio_info
#LogFormat '"%r" %{output_info}n/%{input_info}n (%{ratio_info}n%)' deflate
#CustomLog logs/your_app_deflate_log deflate
ErrorLog logs/your_app_error_log
CustomLog logs/your_access_log combined
</VirtualHost>

```

Save the file, and double-check to make sure it's in the same folder as `httpd.conf`.

Explaining the Proxy

The important part of the file is this section:

```

# Configure mongrel_cluster
<Proxy balancer://mongrel_cluster>
  BalancerMember http://127.0.0.1:4001
  BalancerMember http://127.0.0.1:4002
</Proxy>

```

This section is the load balancer configuration. Each `BalancerMember` points to one of your back-end instances of Mongrel. This configuration supports only two back ends, but you can easily add more. Keep in mind that changing this configuration file requires a restart of Apache.

When a request comes in, Apache checks for a static page. If no static page is found, the system will forward the request to the Rails application, just like a stand.

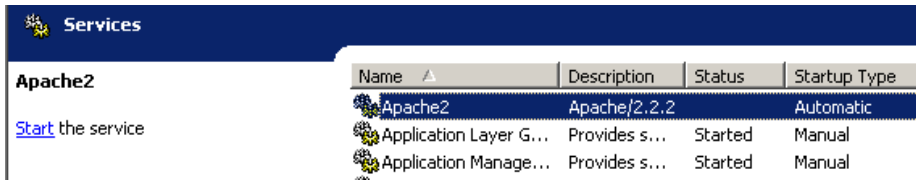


Figure 8.5: Apache installed as a Windows service

Test Apache's Configuration

Open a command prompt, navigate to `c:\apache\bin`, and execute the following command:

```
httpd
```

If you receive no errors, Apache is running and listening on port 8080. If you have Mongrel instances listening on ports 4001 and 4002, then you can test the configuration by pointing your browser to <http://localhost:8080/>. You should see your Rails application.

This section showed you how to host a Rails application using Apache on port 8080. If you wanted to host the application using the standard port 80, you would simply need to change the virtual host definition.

Installing Apache as a Windows Service

Now that Apache has been correctly configured and tested, you can safely install the service.

Open a new command prompt, and enter the following command:

```
cd\apache\bin
httpd -k install
```

You should see the following output:

```
Installing the Apache2 service
The Apache2 service is successfully installed.
Testing httpd.conf....
Errors reported here must be corrected before the service can be started.
```

You should now see the service in your Services panel, as shown in Figure 8.5. Ensure that the start-up type is set to Automatic so it will restart when you restart your server. You might see a Windows Firewall prompt. In that case, you will need to unblock Apache or disable your Windows Firewall service for things to work properly. Apache is now

configured to load balance between two back-end Mongrel processes. You can test this configuration by opening a browser and navigating to <http://localhost:8080/>. Your Rails application will appear.

Now you can go a step further and hide your Apache server behind IIS. Taking this step may seem strange to you, but read on.

8.5 IIS Integration

IIS is a popular web server in Windows-based organizations. Despite its reputation, it can be a very good static web server. In this section, I'll show you how to use IIS to forward requests to your Rails applications. This configuration will allow you to seamlessly integrate a Rails application into an existing IIS website.

Using IIS has a couple of benefits. First, you can use the same SSL certificate for all your Rails applications. Second, you have the flexibility to move the back-end applications to another server at any time. If you find that Windows isn't going to work for you as a deployment method, you can easily move your Rails applications to a Linux-based server and still have requests come through your main web server.

Before you can begin, you will need to get an additional piece of software. I am also going to assume that you will be performing all this on a server where IIS is running on the default port (80) and that your Rails applications reside on the same machine.

Install ISAPI Rewrite

ISAPI Rewrite is a URL-rewriting filter that provides some simple forward proxy support. Though it is not free, it is well worth the nominal fee its developers charge, and you have access to an unrestricted trial version, which will get you through this chapter.

Visit the ISAPI Rewrite site,¹¹ and download the trial version of ISAPI Rewrite 3.0. Launch the installation program, and accept all the default settings. The installation will restart your IIS service, because it needs to install an ISAPI filter on your server.

11. <http://www.isapirewrite.com/>

What About Just Serving Rails Through IIS?

Different groups of people have tried to serve Rails directly through IIS. Some tried to use the FastCGI ISAPI filter, but that configuration requires registry hacks and leads to instability. When I tried the FastCGI approach on three machines, I was able to make it work successfully only on one, and it wasn't very reliable. This option may become more viable soon, but for now, most Windows developers are going with the approaches outlined in this chapter.

Microsoft has actually taken some great steps to make FastCGI better in IIS 7.0, but it has made no specific commitment to serving Rails applications with IIS at the time this book is being written. This stuff moves pretty fast though, so it's definitely something you should keep an eye on.

Using a proxied approach does provide for better long-term scalability, because it is much easier to move your Rails application to one or more separate physical machines. If you plan to host several Rails applications from one server, FastCGI is probably not a good option for you at all.

If you experience trouble with the installation, you'll need to refer to the developers of this product. The support forum¹² is an excellent resource.

Forwarding Requests to Your Application

Say you want to forward all requests from <http://localhost/mytest/> to your Rails application. You need to ensure that one of the following is true:

- You allow script execution from your site root.
- You allow script execution from the folder or virtual directory mytest.

Failing to allow script execution from one of those places will result in a 403.1 error message from IIS.

The file C:\Program Files\Helicon\ISAPI_Rewrite3\httpd.conf contains the rewrite rules that IIS uses to forward requests.

12. <http://www.helicontech.com/forum/>

Forwarding a requested URL to a back-end server is really easy. To forward requests to /mytest to a Mongrel instance on the same machine running on port 4001, you use this rule:

```
RewriteProxy /mytest(.*) http://localhost:4001$1 [I,U]
```

If you're using Apache on port 8080, you just forward requests to that port instead:

```
RewriteProxy /mytest(.*) http://localhost:8080$1 [I,U]
```

You can even go to a different server:

```
RewriteProxy /mytest(.*) http://backend.mydomain.com:4001$1 [I,U]
```

On some systems, especially those that have tightened security, this file is marked as read-only. You'll need to remove the read-only attribute before you can change the file. Also, ensure that the SYSTEM user can read that file.

Testing It

Configure the filter to forward requests to your Mongrel instance on port 4001:

```
RewriteProxy /mytest(.*) http://localhost:4001$1 [I,U]
```

You can now pull up your Rails application via IIS by navigating to <http://localhost/mytest/>. Unfortunately, it's not going to look very good. Read on to find out why.

8.6 Reverse Proxy and URLs

The big problem we're faced with now is that the URLs that Rails creates internally, such as style sheet links, [url_for](#) links, and other links, don't work as you might expect.

For example, if you pull up the URL <http://localhost/mytest/> in your browser, you should see that the application comes up just fine, but without the style sheets. You will also notice that when you click a link, you're transferred to <http://localhost/>, and in some cases your proxy will be exposed. This situation could be especially bad for your users if your application server happens to be behind a firewall that can't be accessed from the Internet.

Neither IIS nor ISAPI_Rewrite has a method to handle reverse proxying. A reverse proxy rewrites the content served from the back end to mask the fact that the request was filtered through a proxy.

A Note About relative_url_root

At first glance, it looks like most problems with the URLs could be solved simply by applying the following code to the `environment.rb` file:

```
ActionController::AbstractRequest.relative_url_root = '/mytest'
```

That change fixes most of the issues, but it doesn't fix any links written using `url_for :only_path => false`. The `reverse_proxy_fix` plug-in that I wrote addresses these issues as well.

I developed a simple Rails plug-in that modifies the way Rails creates URLs in order to address this issue. The plug-in tells Rails to prepend your external URL to any URLs it creates through the system. This plug-in will force all user requests to come back through the IIS proxy. The URLs are altered only when you run the application in production mode, so you don't have to worry about changing routes or configuration files when you deploy your application. It's also safe to keep the plug-in with your application during development.

Installing the Proxy Plug-In

Execute the following command (but all on one line):

```
ruby script/plugin install http://svn.napcsweb.com/public/reverse_proxy_fix
```

from within your application's root folder. Once the plug-in is installed, it asks you for the base URL. Enter `http://localhost/mytest`, and press Enter. If all goes well, the plug-in will write the configuration file. If the configuration file can't be modified, you can configure it yourself by editing the file `vendor/plugins/reverse_proxy_fix/lib/config.rb`.

Using the Proxy Plug-In

Once you've installed the plug-in, you'll need to restart your Rails application. If you're using multiple instances of Mongrel, you'll need to restart all instances before the plug-in will work. Once the applications restart, any internal links in your application will now be automatically corrected, and your users will be routed back through the proxy.¹³

13. This assumes you used `link_to` and `friends` to generate your links and images. Hard-coded paths are not changed by this plug-in.

8.7 Strategies for Hosting Multiple Applications

You can use several strategies to host several applications, and the one you choose depends mostly on the number of users who will use your system. When you have many users and long HTTP requests such as file uploads, you will have to address scaling through adding more back-end processes. That was traditionally done by increasing the number of FastCGI processes, but now you can just add another instance of Mongrel to our cluster.

The next few sections will cover various strategies you can use to deploy several applications into production.

Serve Several Small Applications Using IIS and Mongrel

Serving many small applications is a simple approach. Each application is installed as a Windows service using Mongrel running on a different port. You can then use IIS with ISAPI_Rewrite and the `reverse_proxy_fix` plug-in to mount each application to its own URL within IIS as in Figure 8.6, on page 215:

`http://www.yourdomain.com/app1` ⇒ `http://localhost:4001`

`http://www.yourdomain.com/app2` ⇒ `http://localhost:4002`

`http://www.yourdomain.com/app3` ⇒ `http://localhost:4003`

The ISAPI_Rewrite rules for this are simply as follows:

```
RewriteProxy /app1(.*) http://localhost:4001$1 [I,U]
RewriteProxy /app2(.*) http://localhost:4002$1 [I,U]
RewriteProxy /app3(.*) http://localhost:4003$1 [I,U]
```

You would then need to apply the `Reverse_Proxy_Fix` plug-in to each of your applications, setting the `BASE_URL` parameter for each originating URL.

I don't recommend doing this for production. There's no support for page caching here, and there's just no way to scale up. However, this is a really great approach to demo a site to your stakeholders quickly without going through a lot of complex setup.

Applications, Users, and Requests

How do you measure the size of an application, and how do you choose the method of deployment? People tend to think about application size by thinking about how many users the app will have. There's a slight problem with that, though.

I could have an application with hundreds of models. The application could be very complex, but if there are only 100 people using the application, it's not going to be that problematic to just throw up one instance of Mongrel and let it do the work, provided that there aren't any simultaneous requests.

I could also have an application with five models and three controllers, and this application gets hit 100,000 times a day by students who are registering for a summer orientation session at a university. A single instance of Mongrel would probably work, but there would be a lot of waiting going on.

The number of users an application can support is really not a good measure, though. With Ajax becoming more and more popular and with Rails' support of REST, you may see more hits to your application than you expect, whether it be from a user's browser or another web service.

Requests per second is a much better measure for your site. How many requests does your app need to support per second? Three? Six? Twenty? A hundred? This is something you need to figure out by benchmarking existing applications and doing some forecasting. An application that supports five requests per second can serve 144,000 requests in an eight-hour period. That's not too bad. The problem is that a Rails application is single-threaded. A single instance of Mongrel can serve only one request at a time. So if you have an Ajax-based search on your site, the live updating that the search does can cause other requests to get stuck in a queue.

So, test your apps, and determine the requests per second. If you determine that your small internal application can run on a single instance of Mongrel, that makes life easier. You can easily scale up using the techniques in this book.

Keep in mind that on Windows, your app will typically perform much slower than on another platform, so you may require more balanced back ends to process the same number of requests.

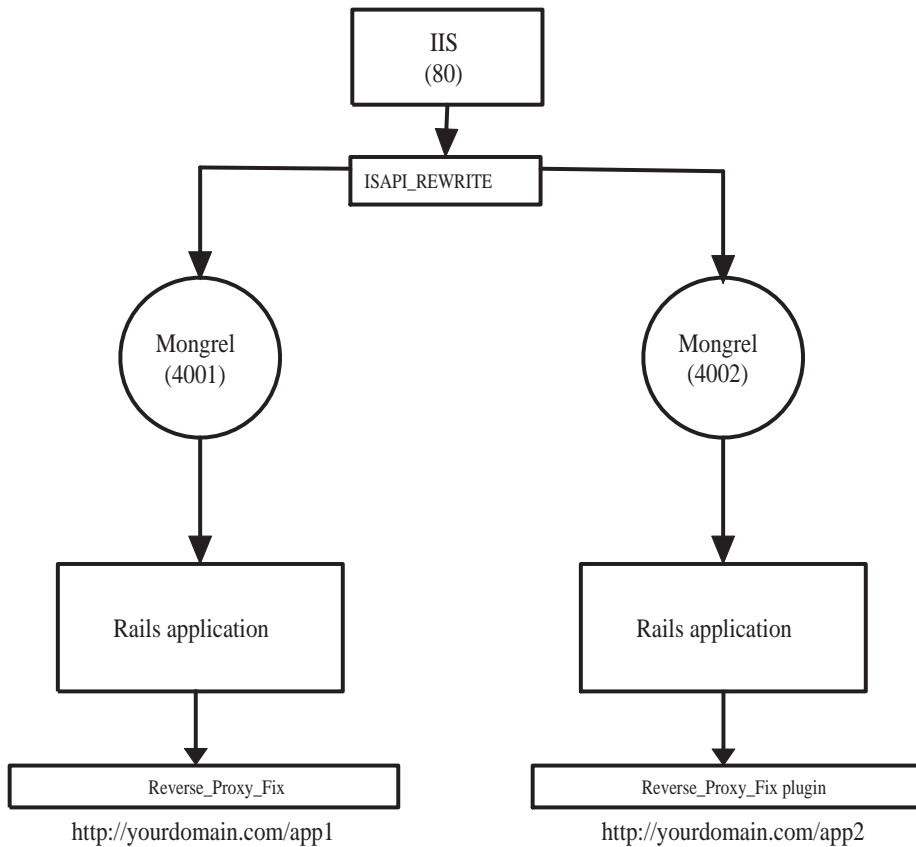


Figure 8.6: IIS forwarding requests to multiple instances of Mongrel

Serving Several Large Applications

You have several possibilities for serving large applications.

One method would be to use Pen to cluster several Mongrel instances and then use IIS to forward requests to Pen as shown in Figure 8.7, on the following page.

This configuration is the same as if you were going directly to Mongrel. You would install multiple copies of Pen on different ports, each forwarding to their own group of Mongrel instances. You would then set up IIS to forward requests to each instance of Pen.

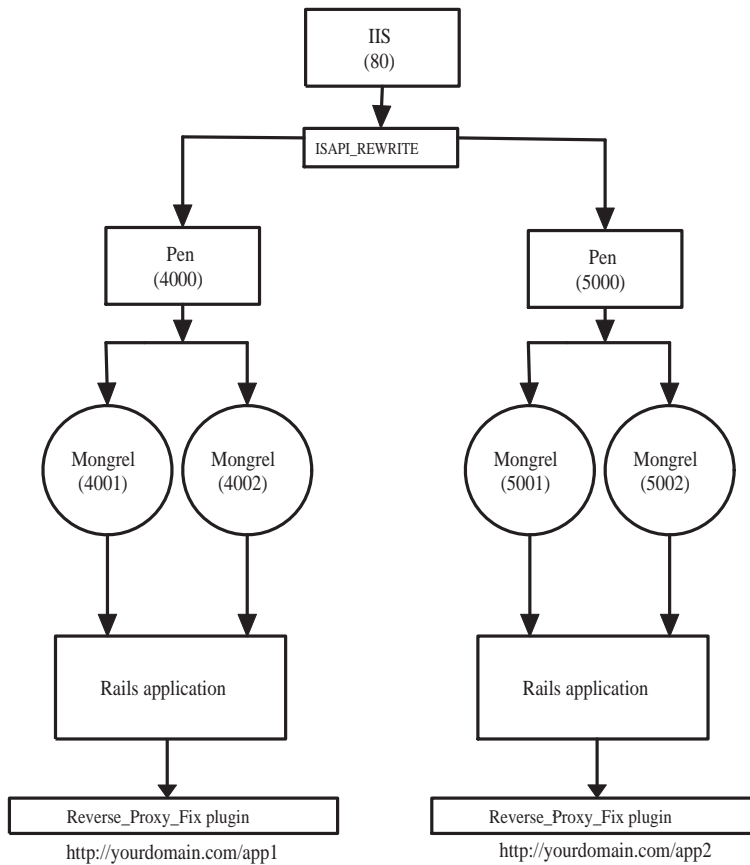


Figure 8.7: IIS forwarding requests to multiple instances of Pen

This is one of those solutions that works well for those cases where your organization has a “no Apache” policy.

This approach won’t be the best approach if your application makes extensive use of page caching, but it is easy to implement and can work fine for systems where every user needs to be authenticated on every request, making page caching a nonissue.

The most performant method is to simply use Apache on port 80. Using the `proxy_balancer` method, Apache can be configured for multiple virtual hosts with each virtual host serving a separate cluster of Mongrel instances as shown in Figure 8.8, on the next page.

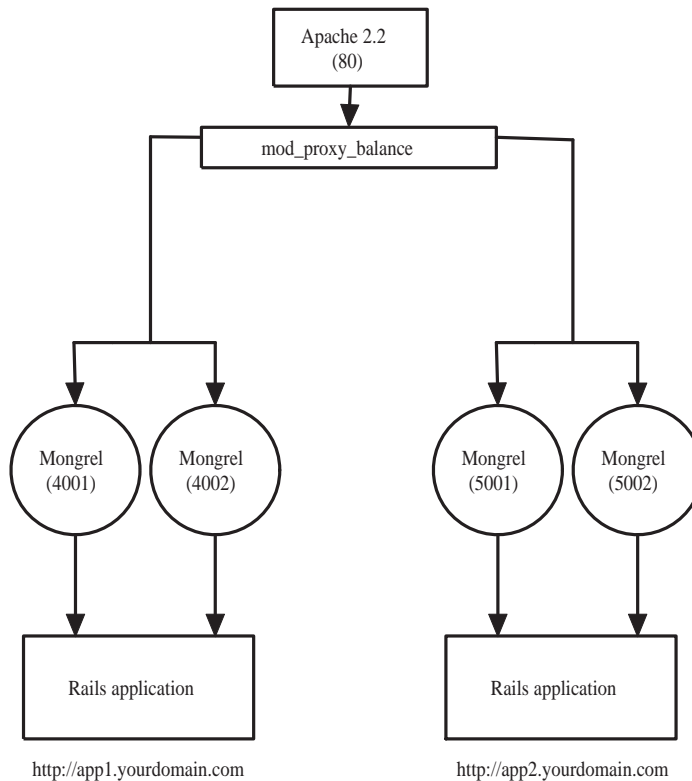


Figure 8.8: Apache 2.2 with `mod_proxy_balancer` on multiple vhosts

Implementing this approach is a matter of creating separate groups of Mongrel instances and then creating a virtual host entry for each of these groups in the `httpd-proxy.conf` file created earlier. Your DNS and local `HOSTS` file would then need to be configured for each virtual host.

This approach yields good performance, scales well, and allows page caching to work effectively. It's the fastest and most stable solution right now for Windows.

Finally, if you want transparent integration, you could make IIS send these requests to your various Apache virtual hosts. This is a more complicated approach with more points of failure, but it will allow you to use your IIS SSL certificates, will allow you to place your database and Rails applications behind a firewall, and will make your applications appear to be integrated. Remember to make use of the `reverse_proxy_fix` plug-in if you choose to use IIS to forward your requests.

Performance on Windows

Ruby does not perform as well on Windows as it does on Linux. Applications that routinely handle 60 requests per second on a Linux box with one instance of Mongrel can handle only six to nine requests per second on Windows. Any more than that, and your users start seeing delays as each request is processed.

If you have a really powerful server, like the fastest thing available with lots of RAM and very little running, then you might see around thirty-five requests per second with a single instance. Linux servers tend to provide much greater throughput with much less expensive hardware.

You can improve performance slightly by looking over the applications you plan to deploy and checking the following areas:

- Change how you use sessions. How are sessions managed in your application? The P-Store, or file-based store, can often be slow. Consider moving your session store into your database, or investigate other session-storing mechanisms.
- Go through your development logs, and make sure you're not making unnecessary calls to your database. Simply adding an `:include` to a finder can really help an application's performance, and it is often missed.
- Use fragment, action, and page caching as much as you can. Since Ruby is slow on Windows, you want to make as much use of page caching as you possibly can so that Rails is never invoked.
- Ensure that nothing is interfering with the process. Certain security auditing software, quota managers, and virus scanners can drastically reduce the amount of requests you can handle. Watch your performance monitor for any spikes when testing your application.

8.8 Load-Testing Your Applications

There are few good choices for load-testing your applications on Windows. If at all possible, get a Linux machine or a Mac, and use `httpperf` to test your application.

If that's just not going to work for you, try one of these alternatives:

- *Microsoft Web Application Stress Tool*: This tool, available online,¹⁴ is a free tool that lets you record your steps through a web application or website and then play them back and generate loads. It can be used to control remote clients as well so you can generate more realistic loads against your application. It has quite a few bugs, but it is still a very useful program. I have found its accuracy to be relatively good.
- *WAPT*: WAPT is a commercial tool that performs load and stress testing of web applications. Like the Microsoft offering, WAPT allows you to record your browsing session so it can be played back. Interpreting the reports can be trickier, but it's worth it because WAPT has the ability to connect to secure sites.

Apache Benchmark (ab): Apache Benchmark is a command-line tool that can be used to hit a URL repeatedly, but it is known to produce extremely misleading results. I use this tool only to generate loads against an application.

8.9 Final Thoughts

I believe that Windows is a good platform for developing Rails applications and does an adequate job of serving Rails applications that have a moderate user base. However, as you begin to develop more applications and gain more users, your needs may change.

I also believe that Linux is the better choice right now. I have a 1GHz desktop machine running Ubuntu and serving a single Rails application from one instance of Mongrel that serves three times as many requests per second than a server with two Xeons at 2GHz.

In recent months, Windows machines are getting much faster, but they are not quite as performant. If your applications aren't performing at an acceptable level and you've done everything you can to optimize them, then you should consider deploying some applications to a Linux test server. The information and strategies I have shared with you can be used to help you migrate some or all of your Rails applications to Linux servers transparently. You could still use IIS or Apache on Windows and move only the Rails applications to Linux, which is a great transitional solution that I've employed a number of times with great success.

14. <http://www.microsoft.com/downloads/details.aspx?FamilyID=E2C0585A-062A-439E-A67D-75A89AA36495>

Testing Tips

- Run your tests from a different machine than the one hosting the application. Testing the throughput on the same machine can lead to unrealistic and inaccurate results.
- Run the stress test against a baseline such as your public home page. This will give you a good idea of how your application compares to your existing services.
- Run the tests from inside and outside of your network. If you can, try running the test from a cable or DSL connection to see what kind of an impact that has.
- Stress test your app on the production server. Some sysadmins may cringe at this, but you should test the application where you plan to deploy it whenever possible. Do some testing during some scheduled downtime or during off-peak times when your server use is low. If you can't do this, you should at least consider having a staging server that mirrors your production machine so you will be able to see accurate results and plan for the future.
- Use more than one tool and compare the results.

8.10 Developing on Windows and Deploying Somewhere Else

If you develop on Windows but plan to deploy on a Linux server such as a virtual private host, a shared host, or a new shiny Linux server that your wonderful bosses purchased especially for you, you should be aware of some issues.

Dispatch.fcgi Ruby Interpreter

When you deploy an application that you created on Windows to a Linux server, the very first line in your `dispatch.fcgi` file will be wrong.

On Windows, it usually reads as follows:

```
#!c:/ruby/bin/ruby
```

On Linux, it often reads as follows:

```
#!/usr/bin/ruby
```

You can figure out what path you should use by connecting to your remote host and typing which ruby.

This is a problem if your hosting platform is using FastCGI because the FastCGI server will be unable to locate the Ruby interpreter. If you're using Mongrel, then it's not really a concern.

Line Breaks

Linux uses different line breaks than Windows does. This can sometimes be a problem because the extra character that Windows uses can interfere with how scripts are processed. Many Linux distributions have a program called dos2unix that you can use to convert the line breaks in your files.

The best solution is to find yourself a good editor for Windows that allows you to specify what type of line breaks are used. Eclipse, NetBeans IDE, Notepad++, and Crimson Editor are just a few examples of editors that are known to work correctly. Windows Notepad should be avoided at all costs, as well as WordPad, because they are meant for Windows-formatted text files.

Permissions

When you deploy your application to a Linux server, you need to check permissions. If your server uses FastCGI, then you need to make sure that you allow the web server's user and group the right to execute `public/dispatch.fcgi`, or your application isn't going to work. If your application uses page caching, ensure that the `public/` folder is writable by the web server's user, or Rails will be unable to write the static versions of the pages.

Preventing Problems When Deploying

Follow these tips to make deploying an application to production from Windows to Linux:

- Create the application on the Linux machine using the `rails` command. This will put all the files in the right locations and make sure that the paths are correct.
- If your production server or web host uses Apache and FastCGI for Rails application hosting, be sure to modify your copy of `public/.htaccess` on your server so that `dispatch.fcgi` is called instead of `dispatch.cgi`.

- Deploy your application files over the top of the ones you created, making sure to ignore overriding the `dispatch.fcgi` or `.htaccess` file. This can easily be scripted if you use Subversion.
- Edit your database configuration file on the production server, and then make sure you never overwrite it when you redeploy. I do not think it is a good idea to store your database passwords in a code repository, so I never check the `database.yml` file in to the repository.
- Run your migrations in production mode to ensure that your database is configured.
- Open the console in production mode (`./script/console production`), and attempt to retrieve some data. This will help test to see if you have any odd characters in your code that need to be converted.
- Test your application on the production server using WEBrick in production mode (`./script/server -e production`). If your host allows you to connect on port 3000, try pulling up your site using that port.
- Configure your production server to use your new application. Some providers like DreamHost have a control panel where you specify the public folder of your Rails app. Once your app is configured, try hitting it with the browser one more time to make sure it comes up.
- Check to see whether the production log is being used. If it's not, you'll need to modify your `environment.rb` file to force production mode. Some shared hosts have been known not to set the environment in their Apache configuration.

A better approach than this is to automate your deployment using Capistrano. You can safely make all these alterations to your files at any time and just check them in to your repository. You can then just deploy using a Capistrano recipe. Capistrano tasks can change permissions, alter files, and more. If you're going through all the trouble to write a program, take a little more time to learn how to automate the deployment. You're less likely to forget something later.

8.11 Wrapping Up

This chapter talked about various strategies you can use to deploy your application. You have a lot of choices to make now, because each method will yield different results. Some might be better than others, but you need to figure out which will work for you and your situation. I can't stress enough the importance of testing your stack. Run performance testing tools against your application before you deploy it, and keep a close eye on it when it's running. You want to make sure you are ready to move to a better deployment solution before you need it.

Don't be afraid to deploy on Windows, though—many people, including myself—have been very successful deploying applications with these methods. It's a great way to get Rails into a Windows-based environment. Once you prove you can be more efficient with Rails, you can push for a Linux deployment stack!

Performance

In the old Chinese proverb, many people can look at the elephant from different perspectives and see different things. In very much the same way, a programmer can look at Rails and smile, experiencing near euphoria. When it's time to deploy that same application and make it scale, the system administrator who is charged with the daunting task of pumping users through it might run howling and shrieking from the room. Rails is very much a trade-off. The same high-level language that makes the beautiful domain-specific languages and allows the sweet dynamic programming enabling Active Record all takes time to execute. All that magic that goes on under the covers and makes things cushy for the application developers has a cost when it's time to push into deployment.

The good news is that you *can* make Rails scale. The framework is specifically designed with shared-nothing principles that will allow you to throw hardware at the problem, as you learned in Chapter 7, *Scaling Out*, on page 144. This has a tendency to make some developers procrastinate on the performance aspects of their applications. Though premature optimization is not always recommended either, you don't get a license to ignore optimization or scalability altogether. In this chapter, I'll walk you through some of the techniques you'll need to know to understand how much traffic a given deployment can handle, and then I'll show you the core techniques to dramatically improve what you have with a little hard work.

9.1 The Lay of the Land

Performance benchmarking is for two kinds of developers: those who take a structured and patient approach and those who love pain. So,

What Doesn't Work?

Before I walk you through the game plan for improving application performance, let me walk you through a few examples of approaches that we know don't often work:

- *Premature optimization*: Focusing on performance above all else may produce the fastest, slickest application whether you actually need the performance or not. However, you may find that this comes at the cost of code that is complex, hard to read, and even harder to maintain. Optimization also takes time, so you may also risk your project schedule and miss deadlines due to features taking too long to implement because of the additional performance enhancements. Instead, performance test your application often throughout the project. Ensure that it will meet an acceptable level of performance for your needs, and optimize only the critical bottlenecks as required.
- *Guessing*: When you find that your application is too slow, you may be tempted to guess about where the problem might be. You may hack through various performance optimizations in an attempt to fix it. You may guess right once or twice, but you'll eventually spend hours on the right solutions to the wrong problems. Instead, use profiling tools, load-testing, and monitoring tools to pinpoint the problem areas before implementing any performance patches.
- *Caching everything*: Rails makes caching fairly easy, so you might just think that caching will always save you at the last minute. But caching is almost always harder than it looks on the surface. This enigmatic performance enhancement creates opportunities for bugs to creep into production where they weren't seen in testing, because cached features can be hard to test. It's especially dangerous to simply enable caching at the last minute and hope that it will work. Instead, try to identify potential hot spots early, such as your home page or latest news feed. Then, design those features with caching in mind, and use a staging environment where caching is enabled so that you can test the application as it will be in production.

What Doesn't Work? (cont.)

- *Fighting the framework*: Rails is a convention-based framework that makes a lot of assumptions. This philosophy works best if you work within the framework. At times, you may feel like getting creative and breaking some of the known best practices and possibly even hacking on Rails to either modify it or work around it. However, you may find yourself using the framework in ways that the Rails designers never intended, so when it comes time to upgrade Rails to the next version or make use of a plug-in that assumes you're using Rails in the expected way, you'll feel the pain. Instead, do your best to work within the constraints of the framework you chose. Ask around and seek out experts in the Rails community, and ask them how they might solve performance problems similar to yours—without breaking the written and unwritten rules.

unless you're the one who loves pain, whenever you deploy a new application, you will want to make a deliberate plan and stay with it as best as you can. The basic steps are shown in Figure 9.1, on the next page.

1. *Be the best you can be: target baseline*: The first thing you want to do is set your expectations. You have to know when you're done. You need a best-case baseline to know your upper performance bound. To do this, take Rails out of the picture to see how many HTTP requests your production servers can handle—you cannot expect to go any faster than that. Then run the simplest possible Rails request to establish a target for Rails applications in general. If there's a large disparity already, you may want try tuning your proxy, FastCGI, or Mongrel. When you're done, this is your target baseline.
2. *Know where you are now: application baseline*: If you want to improve on any application, you have to know where you are so that you know how far you have to go. You'll want to run a simple performance test without optimization of any kind. This is your application baseline.
3. *Profile to find bottlenecks*: After you have a baseline, you should profile your system to locate your bottlenecks. A bottleneck, like the governor on an engine, limits how fast your application can

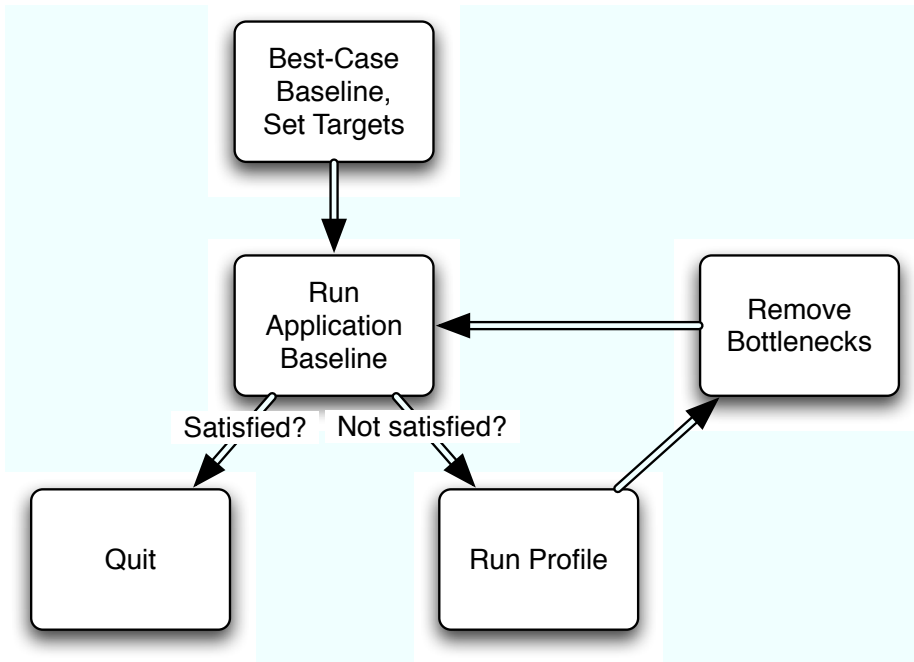


Figure 9.1: Performance process

go, regardless of the rest of the system. You improve performance by systemically eliminating bottlenecks.

4. *Remove bottlenecks*: This is the proper place within your process for performance optimizations. Using profiling and benchmarking, you can understand exactly where your changes will make the biggest impact. You will concentrate on one specific inefficiency and eliminate it. Then, you can run your profile and repeat the process.
5. *Repeat*: Using a basic approach of profiling and benchmarking, making incremental changes to your code, and repeating the process will let you know for sure which code changes increased or decreased performance. You will change one parameter at a time and keep the process simple. Be sure to make a only single change at a time, and take a new measurement. This will save you time in the long run.

Now that I've walked you through the basic premise behind benchmarking, I'd like to walk you through selected pieces of the process and also

through some basic bottlenecks and their solutions. First, you'll take a baseline with a benchmark.

9.2 Initial Benchmarks: How Many Mongrels?

When you are ready to benchmark your application, your initial benchmarks should give you the overall application performance. This means using HTTP load-testing tools to test your application over a network. If you are satisfied with these load-testing results, then you don't have to optimize anything, but many times you will find at least a few areas to tweak.

One question that pops up at this point is the classic "How many Mongrels do I need for my app?" In my experience, people tend to overestimate the number of Mongrels required for optimal performance. Of course, everyone wants to be the next Web 2.0 Google acquisition, but the reality is that most production Rails apps that get less than 100,000 page views per day can be served perfectly well with two or three Mongrels behind a proxy. The only way to know for sure is to benchmark.

I will be using Mongrel in my tests, but the same information applies to any other means of running Rails applications in multiple processes. To practice what I preach, the first thing to do is get a baseline, absolute best-case performance scenario for my current hardware. I will use `ab` (Apache bench) or `httperf` to measure the requests per second of the smallest request that invokes Rails. Create a fresh Rails app with one controller and one action that just does a `render :text => "Hello!"`. This will measure the fastest baseline response time you can expect from a Rails app running on Mongrel on your current hardware.

```
ezra$ rails benchmark_app
ezra$ cd benchmark_app
ezra$ script/generate controller Bench hello
```

Now open the `BenchController` class (the file `bench_controller.rb` in the directory `RAILS_ROOT/app/controllers`), and edit it to look like this:

```
class BenchController < ApplicationController
  def hello
    render :text => "Hello!"
  end
end
```

This `hello` action is the absolute smallest and fastest request a Rails application can serve while still invoking the full stack including sessions. It doesn't call the database server or open and interpolate any

templates. The application calls routing and instantiates the controller to serve the request. Rails has to go through the motions of setting up the session filter chain and all the other magic that happens during the service of one request. As you add code, templates, and database calls to your actions, the results will become slower, but at this point, I'm after a best-case target baseline.

Take a look at the output from the `ab` command. Here is the help banner:

```
ezra$ ab -h
Usage: ab [options] [http://]hostname[:port]/path
Options are:
  -n requests      Number of requests to perform
  -c concurrency   Number of multiple requests to make
  -t timelimit      Seconds to max. wait for responses
  -p postfile       File containing data to POST
  -T content-type   Content-type header for POSTing
  -v verbosity     How much troubleshooting info to print
  -w               Print out results in HTML tables
  -i               Use HEAD instead of GET
  -x attributes     String to insert as table attributes
  -y attributes     String to insert as tr attributes
  -z attributes     String to insert as td or th attributes
  -C attribute      Add cookie, eg. 'Apache=1234' (repeatable)
  -H attribute      Add Arbitrary header line, eg. 'Accept-Encoding: zop'
                    Inserted after all normal header lines. (repeatable)
  -A attribute      Add Basic WWW Authentication, the attributes
                    are a colon separated username and password.
  -P attribute      Add Basic Proxy Authentication, the attributes
                    are a colon separated username and password.
  -X proxy:port     Proxyserver and port number to use
  -V               Print version number and exit
  -k               Use HTTP KeepAlive feature
  -d               Do not show percentiles served table.
  -S               Do not show confidence estimators and warnings.
  -g filename       Output collected data to gnuplot format file.
  -e filename       Output CSV file with percentages served
  -h               Display usage information (this message)
```

I'll start with a simple test against one Mongrel with one concurrent user and 1,000 requests.

```
ez rmerb $ ab -n 1000 http://localhost:3000/bench/hello
This is ApacheBench, Version 1.3d <$Revision: 1.73 $> apache-1.3
Copyright (c) 1996 Adam Twiss, Zeus Technology Ltd, http://www.zeustech.net/
Copyright (c) 1998-2002 The Apache Software Foundation, http://www.apache.org/
```

```
Benchmarking localhost (be patient)
Completed 100 requests
```

```

Completed 200 requests
:      :      :
Completed 900 requests
Finished 1000 requests
Server Software:      Mongrel
Server Hostname:      localhost
Server Port:          3000

Document Path:        /bench/hello
Document Length:      5 bytes

Concurrency Level:    1
Time taken for tests:  9.196 seconds
Complete requests:    1000
Failed requests:      0
Broken pipe errors:   0
Total transferred:    255000 bytes
HTML transferred:     5000 bytes
Requests per second:  108.74 [#/sec] (mean)
Time per request:     9.20 [ms] (mean)
Time per request:     9.20 [ms] (mean, across all concurrent requests)
Transfer rate:        27.73 [KBytes/sec] received

```

```

Connection Times (ms)
      min  mean[+/-sd] median  max
Connect:    0      0   0.0      0    0
Processing:  6      9   6.5      8   83
Waiting:    6      9   6.5      8   83
Total:      6      9   6.5      8   83

```

```

Percentage of the requests served within a certain time (ms)
 50%      8
 66%      8
 75%      8
 80%      9
 90%      9
 95%      9
 98%     10
 99%     32
100%     83 (last request)

```

The main thing I want to see is Requests per second: 108.74 [#/sec] (mean). I ran this benchmark on a 2GHz Intel Core Duo with 2GB of RAM. A small fresh Rails application like this usually will use about 45MB of RAM per Mongrel process. This first benchmark runs on the same host as the Rails application. Remember that this test will provide an absolute best-case performance baseline and does not simulate real-world situations very well.

On modern hardware, you should expect to easily get more than 100 requests a second for this simple action. Your results will vary, but if you are getting more than 100 requests a second, then you are doing fine. You can improve this first baseline by turning off sessions for your action.

That tiny improvement actually increases the results to more than 400 requests a second! This just shows that if you don't need sessions, then be sure to use the session method of ActionController::Base to turn sessions off for any actions that don't use them. In the real world, most actions will require sessions, though, so assume a best-case baseline of 108 requests per second.

The next step is to use a cluster of Mongrels behind a load balancer proxy of some kind. This way I can test concurrent users and come up with our magic number of Mongrel processes that works best on the hardware at hand. Refer to Chapter 7, *Scaling Out*, on page 144 for information about installing and configuring a proxy load balancer.

Once you have your proxy set, then you should start testing with two Mongrels, and then three, and so on. For each battery of tests, you should increase the simulated concurrent users with the `-c` option. I like to test ten, thirty, and fifty levels of concurrency. Any more than that, and the stats become skewed because `ab` has trouble simulating that much load. I am establishing a best-case baseline. I'll do real load testing once I settle on a final configuration and my application is finished. I'll generate my load tests from another server or even multiple servers at once to more closely simulate real-world usage.

Another trick to more closely simulate real-world conditions is to use the `-C` options to set a cookie value. The results from the first benchmark will actually create and save a new session for all 1,000 requests! The real usage of your app will not create so many sessions because once someone logs in, they reuse the same session. Also, you will inevitably want to test protected areas of your site for performance, so you need to be able to maintain a session while benchmarking. To simulate a logged-in user, I will log into the site with a web browser and get the `_session_id` from the cookie. Check your browser's preferences for a cookie viewer of some sort.

Once you have copied the `_session_id` from your browser, then it's time to add it to the `ab` command.

Here is a sample of a sequence of benchmarks to run against your app:

```
ezra$ ab -n 5000 -c 10 -C _session_id=ee738c2fcc9e5ab953c35cc13f4fa82d ↵
      http://localhost/bench/hello
...
ezra$ ab -n 5000 -c 30 -C _session_id=ee738c2fcc9e5ab953c35cc13f4fa82d ↵
      http://localhost/bench/hello
...
ezra$ ab -n 5000 -c 50 -C _session_id=ee738c2fcc9e5ab953c35cc13f4fa82d ↵
      http://localhost/bench/hello
...
ezra$ ab -n 5000 -c 100 -C _session_id=ee738c2fcc9e5ab953c35cc13f4fa82d ↵
      http://localhost/bench/hello
```

Keep adding Mongrels until you don't gain any more requests per second by adding more. This step is especially important for software load balancers like Apache 2.2 or nginx. You might expect that by doubling the number of Mongrels you would double the throughput. You'd usually be wrong. Sometimes using more Mongrels than you need will actually slow down response times because the load balancer works harder to distribute the load. With expensive hardware load balancers, you can get pretty close to doubling throughput by doubling Mongrels, but these devices are out of reach for most application hosting budgets.

By testing in a methodical fashion, you can begin to get an overall view of the performance you can expect from your app. Without a good best-case baseline, it would be hard to know when to keep optimizing code and when to add more hardware. Rails applications tend to vary widely in the way they are coded and the way they utilize resources, so any generalizations about the performance of an app are very hard to make. Being scientific about your process and measuring heavily after every change to any part of the equation will let you know what has helped and what has hurt your performance.

9.3 Profiling and Bottlenecks

Now that I know the overall best-case performance characteristics of my system, I can move on to improving performance. If I've determined that performance is a problem, I can start to plan my attack. I usually work to find bottlenecks by using the Rails profiler, which highlights slower code. Armed with exact data that shows me how long each slice of code is taking, I can eliminate the slowest pieces under my control. Then, I'll benchmark again and repeat the process.

There are two profilers I'll use. The first will test performance of the full request—from the controller, all the way through to the database. The second will drill down a little deeper and focus strictly on the Active Record-based models.

ruby-prof

The Fast Ruby Profiler (ruby-prof) gem lets you profile Ruby in a fairly detailed way. It comes with a convenient Rails plug-in that will let you profile your application including the full stack of your application code. To get started, simply install the gem with `gem install ruby-prof`. Now navigate to the ruby-prof gem directory located under your Ruby installation's `/lib` directory.

Mine was located in `<rubyhome>/lib/ruby/gems/1.8/gems/ruby-prof-0.5.2/rails_plugin`. In that directory, you'll find a subdirectory called `ruby-prof`. Copy that subdirectory to `<your_rails_app>/vendor/plugins/`. Make sure not to move it, because you will need a copy of it for any other Rails apps you want to profile. Finally, there's only one configuration change you need to make to your application.

In each of your environment configurations in `/config/environments`, including `development.rb`, `test.rb`, and `production.rb`, you'll see a line that reads something like `config.cache_classes = [true|false]`. In the test and production configurations, it is set to `true`. In development, it is set to `false`. This parameter needs to be set to `true` so that your profiling metrics aren't severely skewed by the unnecessary reloading of classes. Rather than using production for profiling or modifying development, you should create a new environment specifically for profiling.

Simply copy the `development.rb` file to `profiling.rb`, and set the line `config.cache_classes = true`. Don't forget to add a configuration to `config/database.yml`. You will use the production database instead of creating a new one. Feel free to create one if you want a fully independent environment for profiling. You can also tinker with other settings in the file as you profile. I tend to disable caching when profiling because I'm more interested in how I can improve my code than how it performs when my code isn't run at all. If you want, you can easily create two environments for profiling, one with caching and one without.

Now you're ready to profile your application. Simply start your server with `script/server -e profiling`, and then hit the home page of your application. The output of the profiler will appear in two places: in the console where you started the server and in `log/profiling.log` where profiling is the name of your profiling environment. Here's an example of what you should see:

```
Completed in 0.00400 (249 reqs/sec) | DB: 0.00200 (49%)
  | 302 Found [http://localhost/profiles/login]
  [http://localhost/profiles/login]

Thread ID: 82213740
Total: 0.005

%self    ...  calls  name
20.00    ...    18  IO#read
20.00    ...     2  Mysql#read_rows
20.00    ...    33  Hash#default
20.00    ...     2  Kernel#respond_to_without_attributes?
20.00    ...     1  ActionController::Benchmarking#perform_act...
```

This profile is an example of a login process that looks up a user's profile with a typical login and password. The first interesting line is a typical log line that Rails shows even without the profiler installed. The profile shows how the time was split between rendering in controllers and accessing the database through your models. A lot of the time, this output may tell you what you need to know, but your database access time will likely dwarf the rendering time. That's where the detailed profile numbers may help you out a bit. In the previous lines, you can see activity including network I/O to the database, the parsing of the MySQL row data, and a few calls to various libraries that probably don't concern you as much. If your application spends too much time in either `IO#read` or `Mysql#read_rows`, you could be returning too many rows, too many columns, or large amounts of data within the columns like large text fields. This profile is not everything you will ever need, but it does give you some place to start looking.

What about the rendering? It looks like Rails didn't render anything in the previous profile. The reason is that we're using a redirect-after-post pattern. Typically after submitting data, it's a good idea to redirect the user to a GET request-based view that is friendlier to page reloads and Back buttons. That's what this code did, so the rendering time was actually displayed as a separate request, and the profiler produced separate output for that.

Here's the output for the GET request:

```
Completed in 0.00700 (142 reqs/sec) | Rendering: 0.00300 (42%)
      | DB: 0.00100 (14%) | 200 OK [http://localhost/profiles/view]
[http://localhost/profiles/view]
```

```
Thread ID: 81957820
```

```
Total: 0.007
```

```
%self  ...  calls  name
14.29  ...      6  ActionController::Base#response
14.29  ...     73  Hash#[]
14.29  ...     17  Array#each
14.29  ...     81  String#slice!
14.29  ...      4  Logger#add
14.29  ...      1  ActionController::Benchmarking#render
14.29  ...      1  <Class::ActiveRecord::Base>#method_missing
```

Here you can see where the controller is executed and various methods are accessed inside the controller. Some of these might be your own calls, while others might be internal to Rails. Again, any imbalance in times should give you a place to start looking. This code deals with a fairly simple and balanced request. Don't get too hung up on the details of every single line. Look for the odd results and the long times, and then start to drill down into why. The idea behind profiling is to help pinpoint a place to start looking so that you can eliminate some of the guesswork.

So, what do you do when you want more detail? Be careful what you ask for, because you just might get it! If you need more detailed profiling information to start your digging, `ruby-prof` can provide far more detail. Luckily, it does so in the form of either HTML or even graphical format. Open the Rails plug-in file found at `<your_rails_app>/vendor/plugins/ruby-prof/lib/profiling.rb`. This clean little Ruby script has several configuration options in it. The lines you'll want to look at are similar to the following. I've numbered the comments to make it easier to reference here:

```
# #1 Create a flat printer
printer = RubyProf::FlatPrinter.new(result)
printer.print(output, {:min_percent => 2,
                      :print_file => false})
logger.info(output.string)

# #2 Example for Graph html printer
# printer = RubyProf::GraphHtmlPrinter.new(result)
# path = File.join(LOG_PATH, 'call_graph.html')
# File.open(path, 'w') do |file|
#   printer.print(file, {:min_percent => 2,
#                       :print_file => true})
# end
```

```
# #3 Used for KCacheGrind visualizations
# printer = RubyProf::CallTreePrinter.new(result)
# path = File.join(LOG_PATH, 'callgrind.out')
# File.open(path, 'w') do |file|
#   printer.print(file, {:min_percent => 1,
#                       :print_file => true})
# end
```

By default the script has the Flat printer (#1) enabled. The result is what you've been looking at so far. As you've seen, the results are cryptic and informational at best. You can enable other printers by simply removing the comment characters from the appropriate lines for the printer.

The best one for tracking down specific lines of code is the Graph HTML printer (#2). That option will create an HTML file (and subsequently overwrite it) for each request. The amount of detail in this file is obscene, but here's a small sample, where I've removed many columns and left out most of the rows to make it readable:

```
...      ...      ...
...      ...      ActionView::Base#compile_and_render_template      325
...      ...      ActionController::Base#perform_action_without_filters 1101
66.67%  ...      Kernel#send      0
...      ...      ProfilesController#view      1101
...      ...      ActionController::Base#template_class      1164
...      ...      ...      ...
```

In each section of the report, you'll see a listing of methods, with one method in bold. The bold method is the subject of that particular section. The methods above it are the callers of the bold method. Methods below are methods the bold method called. The bold line also contains the total percentage of the execution time spent in that method. Where possible, the report also contains a line number, which links to the Ruby source on your local file system. Links to Rails code assumes Rails is frozen in your vendor directory. The report is very long, so make use of the text search facilities in your browser to find your own code or other items of interest.

The third printer, KCacheGrind visualization printer (#3), produces a graphical representation of the profile results. I won't go into detail here. If you want to see more examples and get more information about ruby-prof, please refer to the following links. The first is the ruby-prof home on RubyForge, which serves only to prove how poor Ruby docs are in general.

Therefore, I searched for a decent blog posting on the subject and found a very good one that goes into further detail:

- <http://ruby-prof.rubyforge.org/>
- <http://cfis.savagexi.com/articles/2007/07/10/how-to-profile-your-rails-application>

Standard Rails Model Profiler

Most of the time, your performance problems will center around your Active Record models. Either they're too slow or they're being overused by calling classes, such as a finder in a loop. Therefore, if you know that your performance issues are definitely within your Active Record models, you can use a built-in profiler script that comes with Rails.

This script works very much like ruby-prof but is probably already on your machine. Like ruby-prof, it produces an obscene amount of information. I won't exhaust the topic any further and instead just leave you with this example:

```
ezra$ script/performance/profiler 'Profile.find_by_id(1)' 10 graph
Loading Rails...
Using the standard Ruby profiler.
```

%	cumulative	self		self	total	
time	seconds	seconds	calls	ms/call	ms/call	name
12.65	0.22	0.22	114	1.90	2.18	Array#select
10.90	0.40	0.19	498	0.38	0.87	Mysql#get_length
9.09	0.56	0.16	1975	0.08	0.11	Kernel===
6.29	0.67	0.11	107	1.01	1.30	Mysql::Net#read
4.60	0.75	0.08	72	1.10	31.40	Integer#times
4.55	0.83	0.08	3724	0.02	0.03	Fixnum#==
3.67	0.89	0.06	10	6.30	11.00	ActiveRecord::Base#co...
3.67	0.95	0.06	109	0.58	0.58	Object#method_added
3.55	1.01	0.06	137	0.45	5.58	Array#each
2.74	1.06	0.05	12	3.92	5.17	MonitorMixin.mon_acquire
2.74	1.11	0.05	8	5.87	5.87	Class#inherited
2.68	1.15	0.05	963	0.05	0.05	String#slice!
1.86	1.18	0.03	12	2.67	63.67	Mysql#read_query_result
1.86	1.22	0.03	56	0.57	0.57	Mysql::Field#initialize
1.81	1.25	0.03	98	0.32	0.32	Gem::GemPathSearcher#m...
1.81	1.28	0.03	3445	0.01	0.01	Hash#key?
1.81	1.31	0.03	736	0.04	0.04	Array#<<
1.81	1.34	0.03	22	1.41	33.23	Mysql#read_rows
1.81	1.37	0.03	93	0.33	7.53	Mysql#read_one_row

9.4 Common Bottlenecks

So far, all I've done is set up an ideal expectation for performance. The next step is to eliminate bottlenecks. Many experts have explored Rails performance. One of the best is Stefan Kaes. The noted Rails performance guru identified several common Rails bottlenecks in his often-quoted talk at RailsConf.¹ The items are still as relevant today as they were when the list was first released:

- *Slow helper methods.* Since views often call helper methods inside tight loops, it's easy to build helpers that take much too long to calculate. For such common helpers, make sure you keep them lean.
- *Complicated routes.* Each time the web server invokes Rails, the router calculates the routes in your `routes.rb` file. You don't want to have any complex calculations in there.
- *Associations.* Active Record makes it easy to build database-backed code—almost too easy. When associations get loaded too often, performance will suffer. I'll walk you through the most critical performance cases in the section that follows.
- *Retrieving too much from the database.* Active Record retrieves the whole database row by default, and sometimes, you just don't need all that data. If you're retrieving a row with a 4KB description field just to get a foreign key, you may want to trim down that query with `:select`.
- *Slow session storage.* Sessions across many users can add up. Since sessions represent shared memory that Rails holds for indefinite periods of time, you need to pay them special attention.

In the sections that follow, I'll walk you through a couple of the most common performance problems. I'll start with Active Record bottlenecks. Active Record is one of the most convenient persistence frameworks ever built. You can often find Rails developers mocking their Java counterparts with a few trivial lines of code that set up the database, process five relationships, process six custom validations, and even solve world peace—all with a dozen lines of code. Unfortunately, all that convenience and flexibility comes at a cost. A few months later, those same Java counterparts are often the ones doing the mocking. Active Record, out of the box, is *slow*. Luckily, you have a few tools at your disposal to speed things up:

1. <http://fraisexpress.de/blog/files/slides/railsconf2006.pdf>

- *Includes*: When you have associations that you know you will use from the results of a find, you can use the `:include` option. With the `include` option, you'll generate one SQL query instead of many.
- *Piggybacked attributes*: Active Record dynamically builds objects from the objects in the result set for any given find. You can often add attributes to a result set with SQL. I'll show you more in a moment.
- *Custom SQL*: You can build custom SQL to return exactly what you need.
- *Selects*: If you don't need all of the columns of a database, you can eliminate the additional overhead by simply using the `select` option. `Select` specifies which columns you want to retrieve from the model's database table. By default, Active Record returns all of them.

`:include` and the N+1 Problem

By default, Active Record relationships are lazy. That means the framework will wait to access a relationship until you actually use it. Take, for example, a member with an address. You can open the console and type this command: `member = Member.find 1`. You'll see the following appended to your log, as follows:

```
Member Columns (0.006198) SHOW FIELDS FROM members
Member Load (0.002835) SELECT * FROM members WHERE (members.'id' = 1)
```

Member has a relationship to an address that was defined with the macro `has_one :address, :as => :addressable, :dependent => :destroy`. Notice that you don't see an address field in the log when Active Record loaded Member. But if you type `member.address` in the console, you'll see the following contents in `development.log`:

```
./vendor/plugins/paginating_find/lib/paginating_find.rb:98:in 'find'
Address Load (0.252084) SELECT * FROM addresses
  WHERE (addresses.addressable_id = 1
        AND addresses.addressable_type = 'Member') LIMIT 1
./vendor/plugins/paginating_find/lib/paginating_find.rb:98:in 'find'
```

So, Active Record does not execute the query for the address relationship until you actually access `member.address`. Normally, this lazy design works well, because the persistence framework does not need to move as much data to load a member. But assume you wanted to access a list of members and all of their addresses, like this:

```
Member.find([1,2,3]).each {|member| puts member.address.city}
```

Since you should see a query for each of the addresses, the results should not be pretty, in terms of performance:

```
Member Load (0.004063) SELECT * FROM members WHERE (members.`id` IN (1,2,3))
./vendor/plugins/paginating_find/lib/paginating_find.rb:98:in `find'
Address Load (0.000989) SELECT * FROM addresses
WHERE (addresses.addressable_id = 1
      AND addresses.addressable_type = 'Member') LIMIT 1
./vendor/plugins/paginating_find/lib/paginating_find.rb:98:in `find'
Address Columns (0.073840) SHOW FIELDS FROM addresses
Address Load (0.002012) SELECT * FROM addresses
WHERE (addresses.addressable_id = 2
      AND addresses.addressable_type = 'Member') LIMIT 1
./vendor/plugins/paginating_find/lib/paginating_find.rb:98:in `find'
Address Load (0.000792) SELECT * FROM addresses
WHERE (addresses.addressable_id = 3
      AND addresses.addressable_type = 'Member') LIMIT 1
./vendor/plugins/paginating_find/lib/paginating_find.rb:98:in `find'
```

Indeed, the results are not pretty. You get one query for all the members and another for each address. We retrieved three members, and you got four queries. N members; $N+1$ queries. This problem is the dreaded $N+1$ problem. Most persistence frameworks solve this problem with eager associations. Rails is no exception. If you know that you will need to access a relationship, you can opt to include it with your initial query. Active Record uses the `:include` option for this purpose. If you changed the query to `Member.find([1,2,3], :include => :address).each {|member| puts member.address.city}`, you'll see a much better picture:

```
Member Load Including Associations (0.004458)
SELECT members.`id` AS t0_r0, members.`type` AS t0_r1,
members.`about_me` AS t0_r2, members.`about_philanthropy`
...
addresses.`id` AS t1_r0, addresses.`address1` AS t1_r1,
addresses.`address2` AS t1_r2, addresses.`city` AS t1_r3,
...
addresses.`addressable_id` AS t1_r8 FROM members
LEFT OUTER JOIN addresses ON addresses.addressable_id
= members.id AND addresses.addressable_type =
'Member' WHERE (members.`id` IN (1,2,3))
./vendor/plugins/paginating_find/lib/paginating_find.rb:
98:in `find'
```

That's much better. You see one query that retrieves all the members and addresses. That's how eager associations work.

With Active Record, you can also nest the `:include` option. For example, consider a `Member` that has many `contacts` and a `Contact` that has one address. If you wanted to show all the cities for a member's contacts,

you could use the following code:

```
contacts</heading>
member = Member.find(1)
member.contacts.each {|contact| puts contact.address.city}
```

That code would work, but you'd have to query for the member, each contact, and each contact's address. You can improve the performance a little by eagerly including `:contacts` with `:include => :contacts`. You can do better by including both associations using a nested include option:

```
member = Member.find(1, :include => {:contacts => :address})
member.contacts.each {|contact| puts contact.address.city}
```

That nested include tells Rails to eagerly include both the contacts and address relationships. You can use the eager-loading technique whenever you know that you will use relationships in a given query. `:include` does have limitations. If you need to do reporting, you're almost always better off simply grabbing the database connection and bypassing Active Record all together with `ActiveRecord::Base.execute("SELECT * FROM...")` to save the overhead related to marshaling Active Record objects. Generally, eager associations will be more than enough.

Other Active Record Options

Controlling your associations with `:include` and defining exactly which columns you want with `:select` will give you most of the performance you need. Occasionally, you will need a few extra tricks to get you all the way home.

Nested sets: Rails provides a convenient tree for dealing with hierarchies of data. If you're not careful, you can easily build an application that does a query for each node in the tree. When you need to find all nodes in one section of the tree, such as with catalogs, you will be better off using a nested set. You can read more about it in the Rails documentation.

Smart inheritance: The Rails model of inheritance is single-table inheritance. That means that every Active Record model that participates in an inheritance hierarchy goes into the same table. If you try to build models that inherit too deeply, you will cram too much into a single table. You can often use polymorphic associations² instead of inheritance to represent key concepts such as an address or a common base class.

2. <http://wiki.rubyonrails.org/rails/pages/UnderstandingPolymorphicAssociations>

When that fails, you can take advantage of Ruby's duck typing instead of inheritance. Think of a website that uses little bits of content in many different forms across the whole application. Every piece of content may have a name and a description. If you tried to let every different type of class inherit from a class called Content, your whole application would be in one table. The Ruby way to solve this problem is to just add the name and description columns to each table that needs them. Ruby's duck typing will let you treat all kinds of content the same, referring to both the name and description columns.

Both polymorphic associations and duck typing can lead you to better performance but also to much cleaner model code.

Indexes and normalization: Though Active Record hides some of the concepts from you, underneath you're still dealing with a good, old relational databases. Your larger tables will still need indexes on the fields that you'll access often. The same database normalization³ techniques still apply.

9.5 Caching

When you need to stretch Rails for high performance, your first impression will usually be to cache. Before you go down the caching path, take a deep breath. Caching is not a silver bullet. Even in the best of circumstances, caching is difficult to get right, nearly impossible to test well, and unpredictable. If you're not convinced, read the last sentence twice more and also the following list:

- *Caching is ugly.* You'll be polluting parts of your application with code that has nothing to do with the business problem you're trying to solve. Rails can protect you from some of the ugly syntax, but not all.
- *Caching is tough to debug.* You will add a whole new classification of bugs to your system, including stale data, inconsistent data, timing-based bugs, and many more. Keep in mind that it's not just the impact of a model on one page but the interaction between many cached pages that can give your user a strange experience.
- *Caching is complicated.* You'll need to consider all the pages and fragments that a given model can change, how to expire those

3. http://en.wikipedia.org/wiki/Database_normalization

pages across a cluster, the impacts of caching on security and roles, and how to manage the additional infrastructure.

- *Caching limits your user interface options.* You will have to answer many questions that should be independent of implementation. Can you show a flash message? Can you show a user's login and picture? Can you secure a page? Can you have dynamic content of any kind on a page or fragment? Your answers will often be “no” if caching is involved.

If I haven't scared you away from caching by now, I probably won't or shouldn't. You should also know that Rails has a broad spectrum of caching solutions. They are usually well designed and easy to understand. You can divide them all into two categories:

- *Page and fragment caches* let you save some part of a rendered web page. Page and page fragment caches are interesting because for any given page or fragment, you completely take the back end of the application out of the picture. For the cached page or fragment, there's no database access and no expensive computation.
- *Model caches* work exclusively in the realm of the model. Usually, you're trying to save a database access or other computation. By the time this book is published, you should be able to cache the results of an Active Record query. Other plug-ins allow you to explicitly cache any model that's frequently used or expensive to create.

In this section, I'll focus on the page and fragment caching techniques because the model caching techniques are in flux. Along the way, I'll walk you through the strengths and weaknesses of each caching tool and show you how to use them.

Out of the box, Rails provides three primary caching options, in order of performance: *page caching*, *action caching*, and *fragment caching*. You will see that page caching is the fastest because it creates static pages that your web server can serve. Action caching is not nearly as fast because the web server will invoke Rails for each request. Fragment caching is the slowest because Rails caches only a fragment of the page.

The solution you pick depends on the flexibility you will ultimately require. Fragment caching is the only caching solution that allows you to cache a partial page. If you absolutely need to use before filters in your controllers—to restrict a page to an authenticated user, for instance—you will need to use fragment caching or action caching.

Page Caching

Page caching is by far the simplest and most effective caching option if your pages and application are static enough. Getting the basics right is simple. Nailing down all the details can be unbearably difficult. I'll cover the basics first.

Say you have a controller with an index action. The index action creates a catalog page that is relatively complicated, but it rarely changes. Your current setup is not fast enough anymore, so after carefully considering your options, you decide to cache. Since your page is completely the same for each user and changes infrequently, you correctly decide that you should use page caching.

You will need to change your controller to cache the page. You'll also need some strategy for deleting the static page when you want Rails to generate an updated version of your page. You could easily cache the page like this:

```
class CatalogController
  caches_page :index

  def index
    # do something complicated
  end
end
```

When you run this application in development mode, you'll see no difference. Caching is turned off by default in development mode as you would expect. When you're developing, you want to immediately see code changes reflected in your web page. You can turn caching on by editing `config/environments/development.rb` and changing `false` to `true` in the following line:

```
config.action_controller.perform_caching = true
```

Now, when you point your browser to `localhost:3000/catalog` for the first time, Rails will create a static HTML page by the name of `public/catalog/index.html`. Page caching is very effective when you can use it because Rails *never even gets involved*. Your web server can just serve the static page, which can improve your throughput by a factor of 100 or more. Your web server will serve that static page until you physically delete it, which brings me to the next topic.

Sweeping a Page Cache

When you need to clear a cached page, you are actually deleting the HTML file. You can delete pages with file commands or with Rails directives. For simplicity, most people start with the Rails directives. Sooner or later, most complex applications will wind up moving to file-based commands.

I'll start simple. Say your catalog has gifts on the page. You want to expire the index page whenever you create, delete, or update a gift. First, I'll create a method to expire the pages I need to expire when my gift's controller changes a gift.

```
class ApplicationController < ActionController::Base
  def expire_all_gift_pages
    expire_page(:controller => 'catalog', :action => 'index')
  end
end
```

I'll typically keep this method in `application.rb` so any controller that changes the model can call the method, but if changes to gifts were isolated to my gifts controller, this method could easily be a private method on the gifts controller. Next, I can create a simple after filter for each action that changes gifts:

```
class GiftsController < ApplicationController::Base
  after_filter :expire_all_gift_pages, :only => [:create, :update, :destroy]
```

Keep in mind that the `expire_all_gift_pages()` method deletes only a single file on a single machine. If you cluster, you'll have to do something to synchronize your cache across all your nodes. Otherwise, users on different nodes could easily be seeing different versions of your catalogs! To keep things synchronized, you might consider a shared or clustered file system or building a simple web service that explicitly connects to each node in your cluster and expires the page.

The second way that you can expire a page is with a file-based command. Usually, you'll use a class structure called a *sweeper*. Often, you'll find that sweeping individual pages with Rails is a messy process because you don't know exactly which pages are cached. Many applications don't write very often, so it's a perfectly valid approach to sweep your entire cache when any model object changes significantly. A common approach⁴ to sweeping an entire page cache is to observe a model object and delete a whole controller's cache when any model instance changes. I use a slightly different variation of the referenced algorithm

4. <http://www.fngtps.com/2006/01/lazy-sweeping-the-rails-page-cache>

because my page caches of my most active pages depend on a relatively narrow list of model objects:

```
class GiftSweeper < ActionController::Caching::Sweeper
  observe Gift

  def after_save(record)
    self.class::sweep
  end

  def after_destroy(record)
    self.class::sweep
  end

  def self.sweep
    FileUtils.rm_r(Dir.glob(RAILS_ROOT+"/catalog/*")) rescue Errno::ENOENT
  end
end
```

In your controller, you'll need to reference your sweeper:

```
class GiftsController < ActionController::Base
  cache_sweeper :gift_sweeper, :only => [:create, :update, :destroy]
```

You will notice that the sweeper is dead simple. Rather than worry about which pages are dirty, it simply deletes all the cached gift pages. That approach to sweeping may ultimately be too aggressive if you have model objects that change too frequently, but the simplicity of the approach makes it extremely attractive for many applications such as blogs or e-commerce sites where articles and catalogs are changed infrequently.

Page Caching Problems

In a book like this one, all these issues look simple to implement and simple to resolve. In practice, caching is incredibly hard to get right. The following list shows some things to watch:

- *Sweeping the right files:* Most caching complexity in Rails comes from knowing what to sweep. Whenever you change a model object, you must sweep every page that presents any data related to that model. Usually, the hardest part of caching is determining exactly which pages change when you make an update.
- *Getting your URLs right:* The Rails page caching model depends on your URL names. If you need URL parameters to uniquely determine a page, you're out of luck. You will often need a more sophisticated routing rule such as `:controller/:action/:id/:page_number` for

page caching to work. You must also beware of URL encoding. Special encoded characters in your URLs can defeat page caching.

- *Security*: If your content varies for each logged-in user, you will not want to use page caching. Even if you have special before filters to enforce security, Rails will happily show private content to all users because the router never invokes your controller for page caching.
- *Multiple paths*: If you have multiple routes for a given page, you will find page caching more difficult. You will need to make sure you clear the cache for every route that presents one piece of custom content.

A comprehensive page caching treatment of page caching is well beyond the scope of this book, but you should have enough to get started. It's time to move on to action caching.

Action Caching

Action caching works like page caching. You enable this kind of caching with a before filter, just as you do with page caching. Action caching has two major differences from page caching:

- *Controller execution*: When you use action caching, Rails will invoke the controller for each action, even if the action is in the cache.
- *Back end*: Page caching always uses the file system as the file store, but action caching uses a configurable back end.

Syntactically, action caching looks almost identical to page caching. To action cache the index and show actions on the catalog controller, you'd use the following code:

```
class CatalogController
  caches_action :index

  def index
    # do something complicated
  end
end
```

The previous caching code will use the caching back end that you specify in your configuration, which is the file system by default. To expire them, you can use Rails directives like this:

```
expire_action(:controller => 'catalog', :action => 'index')
```

You can also use a regular-expression style of expiration, like this:

```
expire_action(%r{catalog/gifts/.*})
```

Of course, most complicated applications will use sweepers. The syntax of the sweeper remains the same regardless of the type of caching you use. Though the programming interface is similar, the strengths and weaknesses are much different. On the plus side, the action caching model allows greater flexibility. Since the Rails router invokes the controller even for cache hits, you have full access to before and after filters so you can enable features like security. Also, the back end is configurable, so you can use caching strategies that are friendlier to clustering. I'll talk more about the available caching back ends in Section 9.5, *Caching Back Ends*, on the next page.

You know by now that there's no such thing as a free lunch. The added flexibility of filters and a configurable back end comes at a price: performance. Page caching has a huge benefit. Each page service completely bypasses the Rails infrastructure and all of its overhead.

Fragment Caching

Fragment caching works exactly like action caching, but for partial pages instead of full pages. Fragment caching uses directives in the views to mark the content that you want to cache. You can use the out-of-the-box directives, or you can use some add-ons that support time-based expiration.

With out-of-the-box fragment caching, you use the cache helper within your view templates to cache content. Your cached code goes to a configurable back end (see Section 9.5, *Caching Back Ends*, on the following page) that you can later expire with `expire_fragment` directives. In your view, you'd have something like this:

```
<% cache do %>
<%= render partial => 'something_expensive' %>
<% end %>
```

Say you invoked an action called `expensive/action` for the first time, and that action rendered the view with the previous code fragment. The code helper would cache the code to the configured back end and name the cache fragment `expensive/action`. The second time you invoked the `expensive/action` action, Rails would retrieve that action from the cache.

The sweeper would be the same as the sweeper you'd use for either of the other caching strategies. Using a sweeper, you can expire cache fragments based on changes in the model.

Fragment caching has one critical weakness. The Rails programming model strongly suggests that you place any code that accesses your models in the controller. That means the controller will initiate most of your queries. But the fragment caching strategy does not help at all on the controller side. You can do only one of two things: you can run your queries in your views and suffer the consequences of poor application design, or you can extend the fragment caching model with a plug-in or custom code.

```
when_fragment_expired 'fragment_name', 20.minutes_from_now do
  @comments = Comment.find_favorite_comments
end
```

One such plug-in called `timed_fragment_cache` lets you expire fragments based on some time interval. Better still, the plug-in lets you bracket your *controller code* with caching directives. Say you wanted to expire a partial that presented the most popular blog comments every twenty minutes. In the controller, you would have this code:

```
<% cache 'blog_favorites', 20.minutes.from_now do %>
  <%= render partial => 'favorite_comments' %>
<% end %>
```

And in the view, you'd use the `cache` directive with a name and an expiration time:

```
<% cache 'blog_favorites', 20.minutes.from_now do %>
  <%= render partial => 'something_expensive' %>
<% end %>
```

You can immediately see the benefits. Sure, you're saving the time Rails takes to render the view. More important, you're saving the time it takes to retrieve the favorite comments, possibly from a remote database server. The implementation is clean, convenient, and easy to cluster based on the configurable back end. The expiration is also dead simple. Every twenty minutes, Rails expires the fragment and computes a new one.

Caching Back Ends

Page caching always caches content as files in the public directory. This arrangement is easy to implement but harder to cluster. As you've seen, both action caching and fragment caching use the same configurable

back ends. Out of the box, you have several back ends available. The most useful are these two:

- *File system.* The simplest and most convenient choice is the file system. This back-end choice works well with single-server deployments. The choice doesn't cluster as well because to do expiration, you would have to delete files across all nodes in a cluster.
- *Memcached:* The MemCachedStore option lets you use the memcached networked object cache.

Normally, you'll configure your caching options in one of your environments, typically `config/environments/production.rb`. Add the option line `config.action_controller.perform_caching = true`. You don't usually want to leave caching active within your `development.rb` file because you will often need to refresh your web pages, and deleting cached content is a pain. If you need to work with cached content in production temporarily, you can just set the appropriate cache option.

If you think you'll be spending much time working caching issues in development, you can add a new Rails environment. Typically what I do is copy my `test.rb` environment to a new one called `staging.rb`, in which I enable more production-like configurations such as caching. Keep in mind that a typical testing setup will not keep caching enabled!

When you set up the file system cache, you'll just need to make sure the root directory exists, and then you are off to the races. Memcached is a little more difficult. You'll typically need to set memcached up on every developer's local machine, on your production setup, and additionally on any staging machine you have. Testing will not usually use memcached at all.

To set up memcached locally on your development machine, you can use one of the following methods:

- On Windows, use the convenient installer found at <http://jehiah.cz/projects/memcached-win32/>.
- There are two ways for Mac OS X. First, you can try the script at <http://topfunky.net/svn/shovel/memcached/install-memcached.sh>.
- The second approach for OSX is more involved:
 - Download libevent from <http://monkey.org/~provos/libevent/>, configure, make, and make install it.

- Get memcached from <http://www.danga.com/memcached/>, and uncompress it.
- In the uncompressed memcached directory, locate memcached.c, and edit it.
- Anywhere in the file before line 105, add #undef TCP_NOPUSH, and save.
- Run the usual ./configure, and then make and sudo make install.

To set up memcached on your Linux server (or your Linux development box), you might want to find specific instructions for your Linux distribution. However, the following steps I found⁵ worked for me:

```
# Install libevent
curl -O http://www.monkey.org/~provos/libevent-1.1a.tar.gz
tar xzf libevent-1.1a.tar.gz
cd libevent-1.1a
./configure
make
make install
cd ..

# Install memcached
curl -O http://www.danga.com/memcached/dist/memcached-1.1.12.tar.gz
tar xzf memcached-1.1.12.tar.gz
cd memcached-1.1.12
./configure
make
make install

# Then add /usr/local/lib to LD_LIBRARY_PATH in your .bash_profile
LD_LIBRARY_PATH=$LD_LIBRARY_PATH:/usr/local/lib
export LD_LIBRARY_PATH

# Then test:
memcached -m 512 -u nobody -vv
```

Memcached has a pretty limited command-line interface that is pretty much good only for starting memcached:

```
ezra$ memcached -help
memcached 1.1.12
-p <num>      port number to listen on
-l <ip_addr>  interface to listen on, default is INDRR_ANY
-d           run as a daemon
```

5. <http://dotnot.org/blog/archives/2006/01/04/install-memcached-on-linux-centos-42/>

```

-r           maximize core file limit
-u <username> assume identity of <username> (only when run as root)
-m <num>     max memory to use for items in megabytes, default is 64 MB
-M          return error on memory exhausted (rather than removing items)
-c <num>     max simultaneous connections, default is 1024
-k          lock down all paged memory
-v          verbose (print errors/warnings while in event loop)
-vv         very verbose (also print client commands/responses)
-h          print this help and exit
-i          print memcached and libevent license
-P <file>    save PID in <file>, only used with -d option

```

To stop memcached, use `killall memcached`. Otherwise, flushing memcached can be done only via the API, which you can find more information for at <http://www.danga.com/memcached/>. You might want to stop and start the memcached server with your Capistrano deploy scripts. Similarly, you may want to create a couple of custom Rake tasks to flush the cache when you need to in development and production.

9.6 Conclusion

There are good Rails projects and bad ones. Good projects benefit from good planning and discipline. Getting good performance out of Rails definitely takes discipline. In this chapter, I laid out a disciplined approach to get you the strongest possible performance quickly.

The first step in the process was to establish a baseline. I used Apache bench or httpperf to measure the smallest application that I could create with Rails. This best-case scenario for the application told me the high-end expectation for my Rails application given the hardware and resources. I could use the same technique to run an application baseline to show me the application performance, without optimizations.

If I detected a performance problem, I might decide to start making arbitrary changes to improve performance, but I would probably guess wrong. Instead, I profile to find out exactly which pieces of my code base are breaking. Various Rails tools include the `ruby-prof` gem and the `basic_profiling.rb` script. Using these commands with various options, I could find bottlenecks.

After locating a bottleneck, I could solve the bottleneck using several techniques in the chapter. Caching helped me sidestep a few lines of Ruby code or bypass Rails entirely, trading flexibility and power for speed. I also showed how to improve Active Record performance.

You learned that Rails is not going to squeeze every last cycle out of your hardware, but you can usually get a system that is fast enough and scalable enough, unless you're trying to put Google or eBay out of business. But getting the most out of Rails depends on your knowledge and your discipline.

Chapter 10

Frontiers

Both the Ruby programming language and Ruby on Rails are fairly well established, but the various Ruby deployment platforms are very much in their infancy. It is the hope of this team of authors that this book is the state of the art in Rails deployment for a very short time. For that to happen, a better deployment platform must emerge that radically changes the whole Ruby stack. There are already three good alternatives.

10.1 Yarv

The next version of Ruby, 1.9, will formally have a virtual machine at its core. The goal of Yarv is to build the fastest virtual machine for Ruby in the world. So far, they seem to have succeeded.¹ This implementation is much faster than the current implementation of Ruby. The bytecode support will lead to a more portable, faster code base. This implementation will be the first step in moving Ruby to a first-class virtual machine. But all eyes will be on Rubinius and Ruby 2.0.

10.2 Rubinius

Rubinius is a next-generation virtual machine written primarily in Ruby and loosely based on the Smalltalk-80 Blue Book. The current target version of Ruby is version 1.8.6, but once Rubinius is 1.8.6 compatible, work will begin on 1.9 and 2.0 compatibility. The virtual machine called *shotgun* is a tiny core written in C, with the rest of the runtime written almost entirely in Ruby. It uses newer techniques, such as a better

1. http://www.atdott.net/yarv/bench_20041002.txt

garbage collector, that were not available when Matz's Ruby Interpreter (MRI) was created. The team proclaims the goal that "anything that can be written in Ruby will be." The pure Ruby core makes it easier to extend. The compiler (also written in Ruby) generates bytecode, making the resulting programs more efficient than the current strategy MRI uses. The virtual machine will come with a packaging and deploying strategy for Ruby bytecode in the form of .rba files (Ruby Application Archive). This structure will allow you to package all of your bytecode for a project into one file for easy deployment.

Rubinius is creating a test suite using RSpec-like syntax. Since there is no official spec for Ruby, this suite of tests will serve as a specification of the language. This test suite is making it easier for platforms such as JRuby and Iron Ruby to prove compatibility with the core language implementation. Having all the new Ruby implementations share a common suite of specs will help keep Ruby the language from fragmenting as these alternate implementations evolve.

Rubinius is worth watching as a deployment platform for a number of reasons. For a good understanding of the impact of bytecode on a deployment platform, look no further than Java. The bytecode architecture for the Java virtual machine is an extremely successful deployment platform that will lead to the following advantages:

- Rubinius-compiled bytecode will be very efficient.
- Rubinius bytecode will be easier to package and deploy.
- The Rubinius virtual machines will insulate the programmer from the operating system, making Ruby code much more portable.
- Virtual machines can have configurable security policies, making Rubinius applications potentially more secure.
- The work on `mod_rubinius` aims to replace the multiple moving parts of a typical Mongrel deployment strategy with a simple-to-configure, true-Ruby application server that can sit behind Apache or nginx.

Rubinius is rapidly picking up momentum. Engine Yard has six full-time people working on the project with plans to make it the de facto Ruby VM. It already has improved libraries for concurrency and a better strategy for providing operating systems services without the need for a binding layer. Engine Yard's commercial support will lead to a stronger, supported project. For more information, visit the site at <http://rubini.us/>.

10.3 JRuby

JRuby is a Ruby implementation written entirely in Java. The implementation has many advantages associated with the Java virtual machine. While most Ruby applications run a separate process per instance, the JRuby implementation can use a separate native thread per instance. This implementation should eventually let a Rails application run with a fraction of the resources of a typical application running with a pack of Mongrels. Currently, though, most JRuby deployments still use a pack of Mongrels with `mongrel_jcluster` and thus consume more resources than a typical Mongrel deployment on MRI.

If you have significant investment in Java applications, you can access those Java classes directly from JRuby applications. Testing, scripting, Rails development, and user interface development are only a few places that developers are actively using JRuby today.

The key inroads of the JRuby platform in my opinion are political. The two core developers, Charles O. Nutter and Thomas Enebo, are now working for Sun Microsystems. This move has completely changed the JRuby project. Since Sun is committed to moving the technology forward, the team has better access to resources that will advance the platform. Most important, these two key developers have much more time to build and evangelize JRuby since they can work on it full-time.

10.4 IronRuby

IronRuby is a Ruby implementation on Microsoft's .NET platform. IronRuby, based on Ruby version 1.8.x, boasts seamless integration with .NET infrastructure and libraries. To date, most of the implementation is written in C#. The shared source project has been around since about April 2007. The project is released under the BSD-like Microsoft permissive license.

Unlike the Java virtual machine, .NET has some target features, called the Dynamic Language Runtime (DLR), that target dynamically typed languages like Ruby. This foundation provides a core set of services that permit fast and safe dynamic language code.

IronRuby has not been around as long as JRuby, but the parallels should be obvious. The managed .NET environment has important advantages for any team considering deploying a .NET application.

10.5 Wrapping Up

I hope you've enjoyed this pass through the Rails deployment scene. With the information in this book, you should be able to handle simple deployments on shared hosts, as well as complex deployments spanning several application and web servers. With the examples in the Capistrano chapter, you should have a good understanding of how to build custom deployment scripts. You can also take a reasonable shot at tuning your deployment for performance and managing the result.

I do urge you to listen closely to the state of the art. You've seen in this chapter that the Ruby deployment picture will move quickly. I've presented a few important frontiers in deployment. Others will emerge too. With any luck, the emergence of the new alternatives will be as exciting as the emergence of the current frontier—the Mongrel, Monit, and Capistrano foundations—that form the heart of the Rails deployment story today.

Appendix A

An Example nginx Configuration

In Chapter 7, *Scaling Out*, on page 144, I based Apache and nginx configurations on existing configurations. I used the base configurations that came with Apache as a foundation for that web server, but nginx has no consensus base configuration for Rails. The following configuration, complete with comments, serves as the foundation for the nginx configurations in this book:

[Download](#) nginx/nginx.conf

```
# user and group to run as
user  ezra ezra;

# Nginx uses a master -> worker configuration.
# number of nginx workers, 4 is a good minimum default
# when you have multiple CPU cores I have found 2-4 workers
# per core to be a sane default.
worker_processes 4;

# pid of nginx master process
pid /var/run/nginx.pid;

# Number of worker connections. 8192 is a good default
# Nginx can use epoll on linux or kqueue on bsd systems
events {
    worker_connections 8192;
    use epoll; # linux only!
}

# start the http module where we config http access.
http {
    # pull in mime-types. You can break out your config
    # into as many include's as you want to make it cleaner
    include /etc/nginx/mime.types;
```

```

# set a default type for the rare situation that
# nothing matches from the mime-type include
default_type application/octet-stream;

# This log format is compatible with any tool like awstats
# that can parse standard apache logs.
log_format main '$remote_addr - $remote_user [$time_local] '
                '$request' $status $body_bytes_sent "$http_referer" '
                '$http_user_agent' "$http_x_forwarded_for";

# main access log
access_log /var/log/nginx/access.log main;

# main error log - Do not comment out. If you do
# not want the log file set this to /dev/null
error_log /var/log/nginx/error.log notice;

# no sendfile on OSX
sendfile on;

# These are good default values.
tcp_nopush      on;
tcp_nodelay     on;

# output compression saves bandwidth. If you have problems with
# flash clients or other browsers not understanding the gzip format
# then you may want to remove a specific content type that is affected.
gzip            on;
gzip_http_version 1.0;
gzip_comp_level 2;
gzip_proxied any;
gzip_types      text/plain text/html text/css application/x-javascript
                text/xml application/xml application/xml+rss text/javascript;

# this will include any vhost files we place in /etc/nginx/vhosts as
# long as the filename ends in .conf
include /etc/nginx/vhosts/*.conf;
}

```

Appendix B

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