7: Desired State and Data



Slide 2

Objectives



After completing this module, you should be able to

- > Explain when to use a template resource
- > Create a template file
- > Use ERB tags to display node data in a template
- > Define a template resource

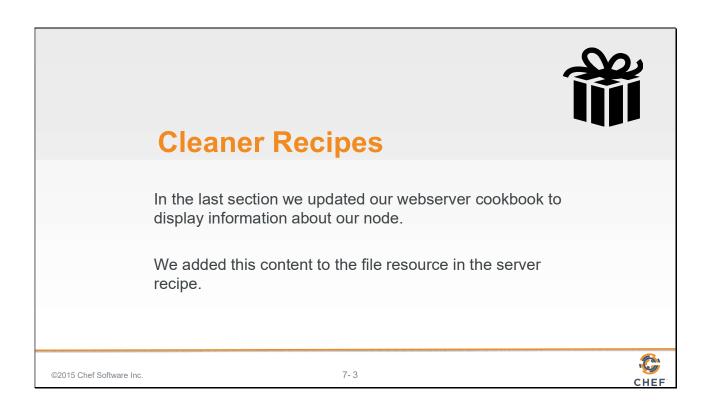
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In this module you will learn how to understand when to use a template resource, create a template file, use ERB tags to display node data in a template, define a template resource.

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We were successful in displaying the details about the system instead of using hard-coded values. We added that content to the content attribute of the file resource that generates the Default page for the webserver.

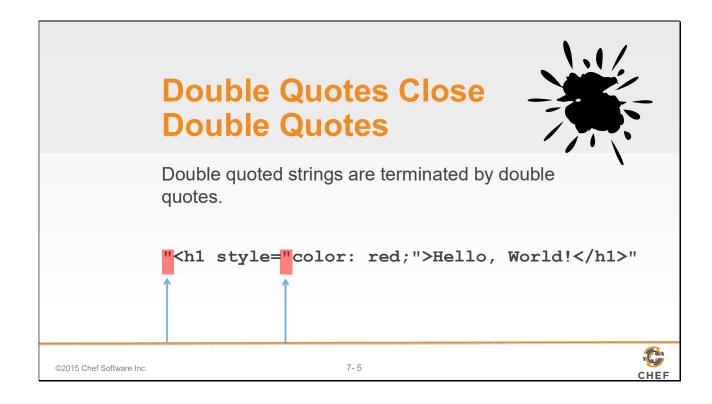
Slide 4

What if new changes are given to us for the website splash page?

For each new addition we would need to return to this recipe and carefully paste the contents of the new HTML into the string value of the content attribute.

Let's talk about some ways in which this method of keeping the content within the recipe will be problematic as we make more changes.

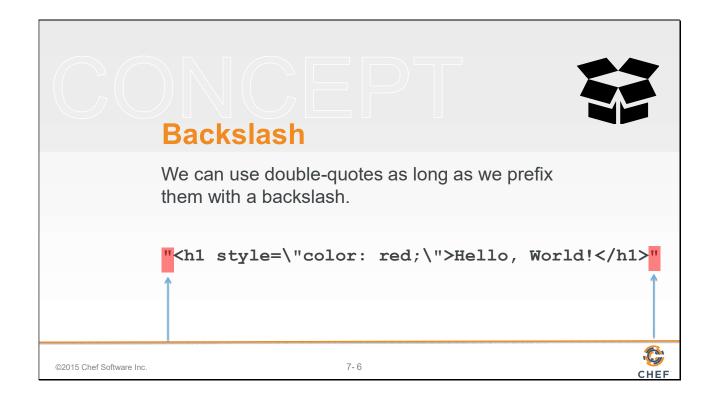
Slide 5



There are some things that you need to be careful of when working with double-quoted strings in Ruby: double-quoted strings are terminated by double-quotes.

If any of the text that we paste into this content field has double quotes it is going to have to be escaped. This can possibly become a problem if we wanted to add some additional style or design to our splash page.

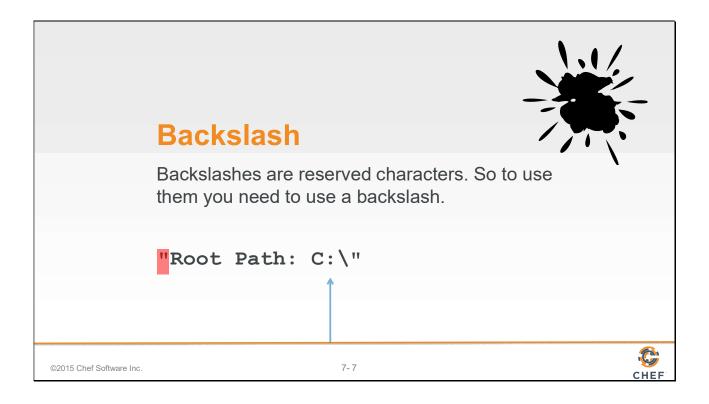
Slide 6



With Ruby strings you can use the backslash character as an escape character. In this case, if you wanted to have a double-quote inside a double-quoted string, you would need to place a backslash before the double-quote.

Here is the fixed version where all the double-quotes within the string are escaped to ensure that Ruby will read this as a single string of characters.

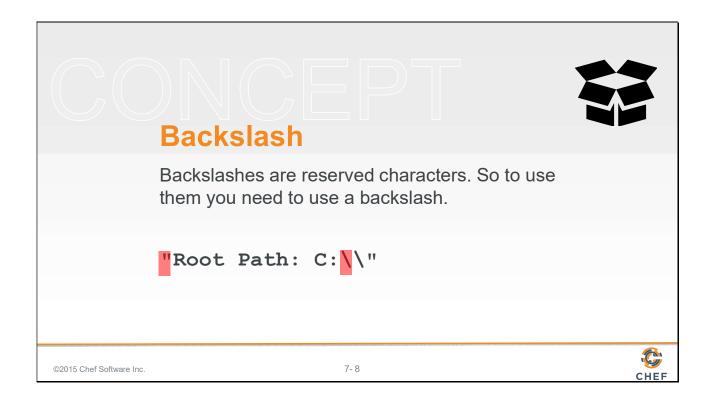
Slide 7



That also brings up an issue with the backslash character. This is particularly important on Windows where the file separator is often represented with a backslash character. You will need to keep an eye out for backslash characters because backslash characters are now the escape character in a double-quoted string.

If you want to literally represent a backslash you'll need to use two-backslashes.

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So every time text you use a double-quoted string, you will need to find and replace all backslashes with double-backslashes and then replace all double-quotes with backslash double-quotes.

Slide 9

```
Unexpected Formatting

file '/etc/motd' do
    content 'This is the first line of the file.
        This is the second line. If I try and line it up...

Don't even think about pasting ASCII ART in here!

end

This is the first line of the file.
        This is the second line. If I try and line it up...

Don't even think about pasting ASCII ART in here!
```

It is important to note that the file content may have some important formatting that might be easily overlooked when working with the content in a recipe file.

Besides that, if the size of the string value of the content field grows, it will consume the recipe--making it difficult to understand what the desired state is and what the data is.

Instructor Note: The Message of the Day file is not a white-space important file. Other configuration files that could be managed with Chef may be white-space important.

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Copy Paste

This process is definitely error prone. Especially because a human has to edit the file again before it is deployed.

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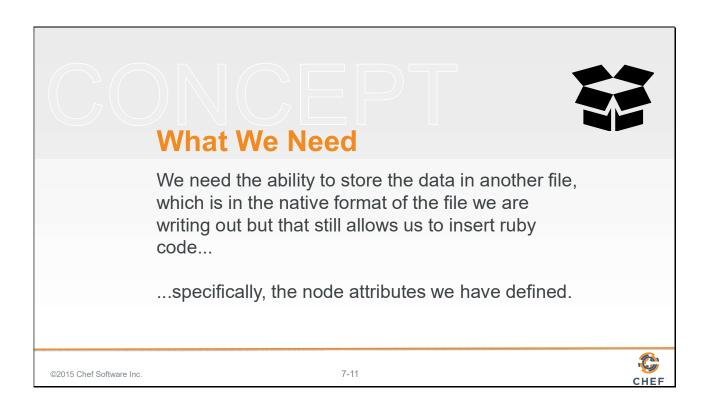


So if you are copying and pasting large amounts of text content into a double-quoted string it will be important to check that every time.

This sounds like a bug waiting to happen.

Any process that requires you to manually copy and paste values and then remember to escape out characters in a particular order, is likely going to lead to issues later when you deploy this recipe to production.

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It is better to store this data in another file. The file would be native to whatever format is required so it you wouldn't need to escape any common characters.

But you still need a way to insert node attributes. So you really need a native file format that allows us to escape out to ruby.

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To solve this problem, we need to read up on the file resource more or see if Chef provides alternatives.

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Use the file resource to manage files directly on a node.

Use the **cookbook_file** resource to copy a file from a cookbook's **/files** directory. Use the **template** resource to create a file based on a template in a cookbook's /templates directory. And use the **remote_file** resource to transfer a file to a node from a remote location.

https://docs.chef.io/resource_file.html

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Let's start from what we know--the file resource. Open the documentation and see what it says and see if it gives us an clue to finding alternatives.

The file resource documentation suggests a couple of alternatives to using the file resource: cookbook file resource; template resource; and remote file resource.

Let's start with the remote file resource.

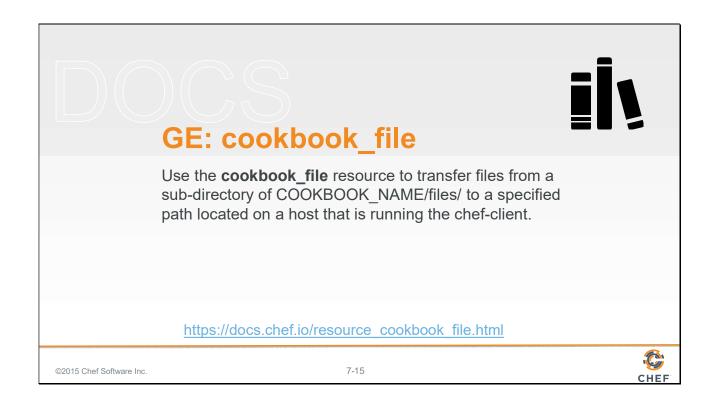
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Reading the documentation for remote_file, it seems that remote_file is similar to file. Except remote_file is used to specify a file at a remote location that is copied to a specified file path on the system.

So we could define our index file or message-of-the-day file on a remote system. But that does not allow us to insert attributes about the node we are currently on.

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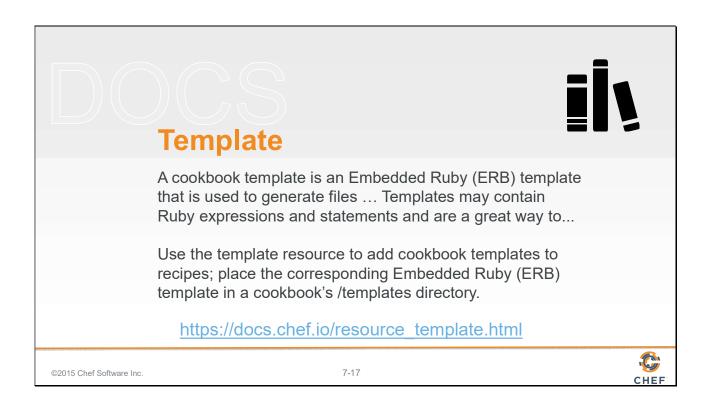
Reading the documentation for cookbook_file, after the boiler-plate resource definition, it sounds as though a cookbook file is capable of...

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...allowing us to store a file within our cookbook and then have that file transferred to a specified file path on the system.

While it sounds like it allows us to write a file in its native format, it does not sound as though the ability exists to escape out to access the node object and dynamically populate data.

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Let's explore templates.

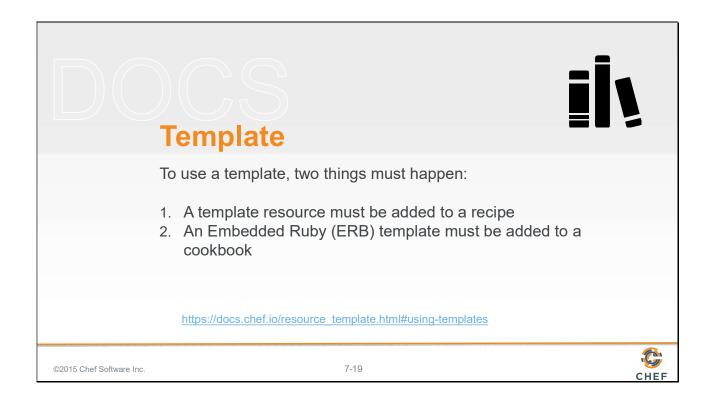
Reviewing the documentation, it seems as though it shares some similarities to the cookbook file resource.

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A template can be placed in a particular directory within the cookbook and it will be delivered to a specified file path on the system.

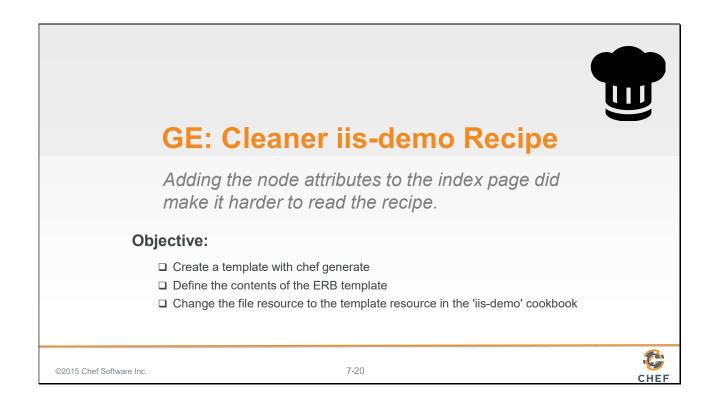
The biggest difference is that it says templates can contain ruby expressions and statements. This sounds like what we wanted: A native file format with the ability to insert information about our node.

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And if we look at the bottom section about "Using Templates", we'll see more information about what is required and how we can use them to escape out to execute ruby code.

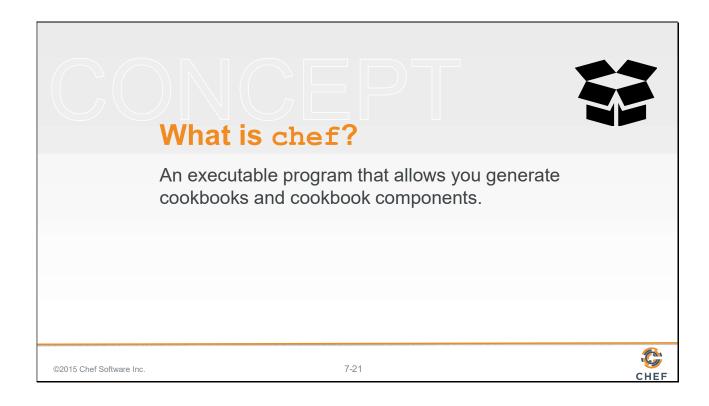
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So our objective is clear. We need to use a template resource and create a template and then link them together.

Let's start by creating the actual template file and then we will update the recipe.

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Remember that application Chef--the one that generated our cookbooks. Well it is able to generate cookbook components as well.

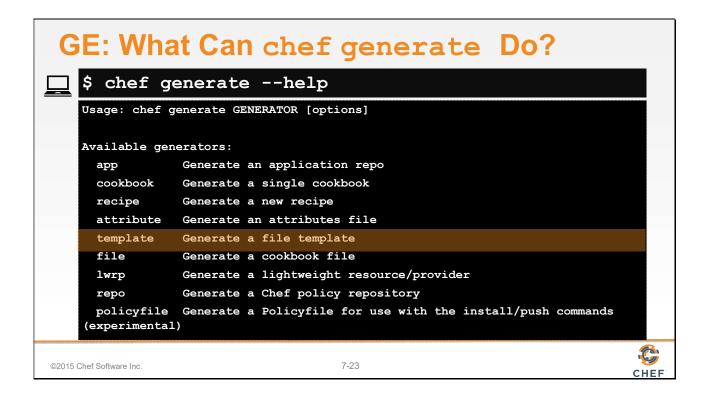
Templates and files (for cookbook_files) are a few of the other things it can generate for us.

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```
GE: What Can chef Do?
  $ chef --help
  Usage:
       chef -h/--help
       chef -v/--version
       chef command [arguments...] [options...]
  Available Commands:
                  Runs the command in context of the embedded ruby
       exec
                  Runs the `gem` command in context of the embedded ruby
      gem
       generate Generate a new app, cookbook, or component
       shell-init Initialize your shell to use ChefDK as your primary ruby
                  Install cookbooks from a Policyfile and generate a locked
       install
   cookbook set
                                     7-22
       ©2015 Chef Software Inc.
```

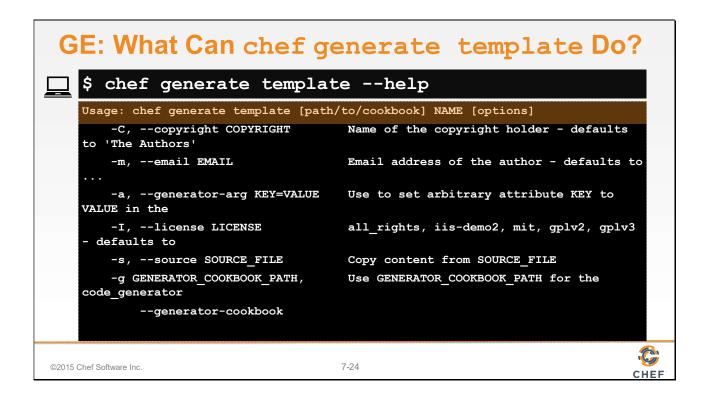
Let's use help to review the command again.

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And let's ask for help about the 'generate' subcommand.

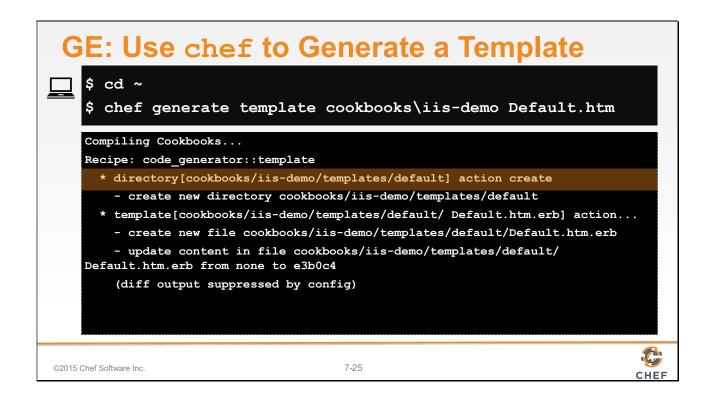
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Finally let's ask for help for generating templates.

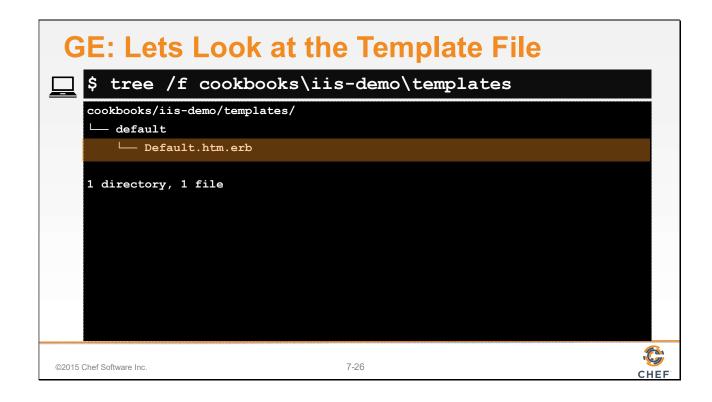
The command requires two parameters--the path to where the cookbook is located and the name of the template to generate. There are some other additional options but these two seem like the most important.

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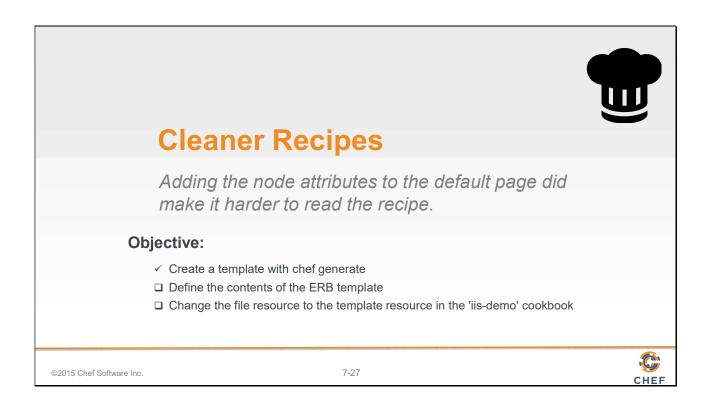
Use 'chef generate template' to create a template in the iis-demo cookbook found in the cookbooks\iis-demo directory and the file we want to create is named Default.htm.

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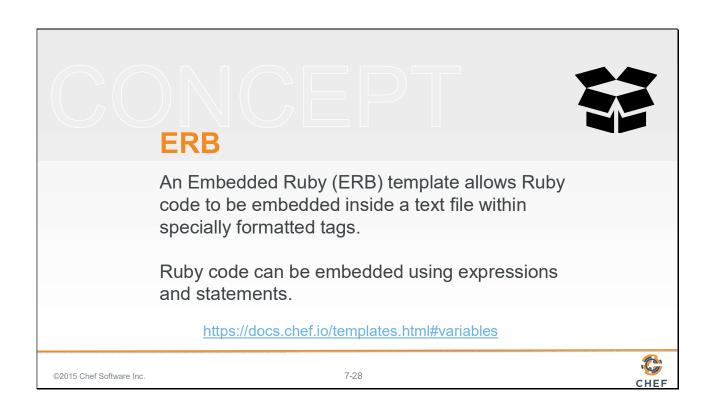
That is the first step. Now that the template exists, we are ready to define the content within the template file.

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Now we need to understand what ERB means.

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ERB template files are special files because they are the native file format we want to deploy but we are allowed to include special tags to execute ruby code to insert values or logically build the contents.

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Here is an example of a text file that has several ERB tags defined in it.

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```
Text Within an ERB Template

<
```

Each ERB tag has a beginning tag and an ending tag.

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The beginning tag is a less-than sign followed by a percent sign. The closing tag is a percent sign followed by a greater-than sign.

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```
Text Within an ERB Template

<
```

These tags are used to execute ruby but the results are not displayed.

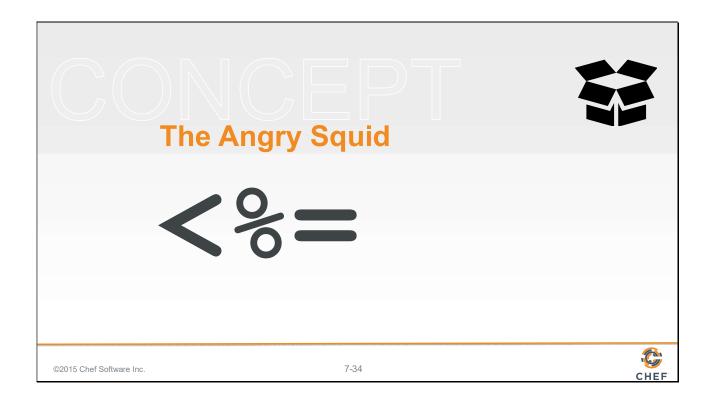
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```
Text Within an ERB Template

<
```

ERB supports additional tags, one of those is one that allows you to output some variable or some ruby code. Here the example is going to display that 50 plus 50 equals the result of ruby calculating 50 plus 50 and then displaying the result.

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The starting tag is different. It has an equals sign. This means show the value stored in a variable or the result of some calculation.

We often refer to this opening tag that outputs the content as the Angry Squid. The less-than is its head, the percent sign as its eyes, and the equals sign its tentacles shooting away after blasting some ink.

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```
GE: Move Our Source to the Template

-\cookbooks\iis-demo\templates\default\Default.htm.erb

-\text{html}

-\cookbooks\iis-demo\templates\default\Default.htm.erb

-\text{html}

-\cookbooks\iis-demo\templates\default\Default.htm.erb

-\text{html}

-\cookbooks\iis-demo\templates\default\Default.htm.erb

-\text{html}

-\cookbooks\iis-demo\templates\default\Default.htm.erb

-\text{html}

-\cookbooks\iis-demo\templates\default\Default.htm.erb

-\chinck
-\text{html}

-\chinck
-\chi
```

With that in mind let's update the template with the current value of the file resource's content field.

Copying this literally into the file does not work because we no longer have the ability to use string interpolation within this html file. String interpolation only works within a ruby file between a double-quoted String.

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```
GE: Replace String Interpolation with ERB

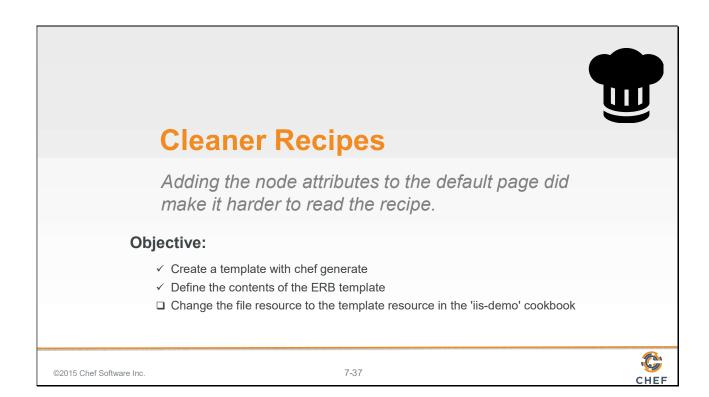
-\cookbooks\iis-demo\templates\default\Default.htm.erb

-\text{html>}
-\cookbooks\iis-demo\templates\default\Default.htm.erb

-\text{chtml>}
-\text{chtml>}
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```

We are going to need to change string interpolation sequence with the ERB template syntax. And it seems for this content we want to display the output so we want to make sure that we are using ERB's angry squid opening tag.

Slide 37



The template is created and the contents are correctly defined. It is time to update the recipe.

Slide 38

Let's open the iis-demo cookbook's recipe named 'server'.

We will want to remove the content attribute from the file resource. Because that content is now in the template. But only if we use a template resource.

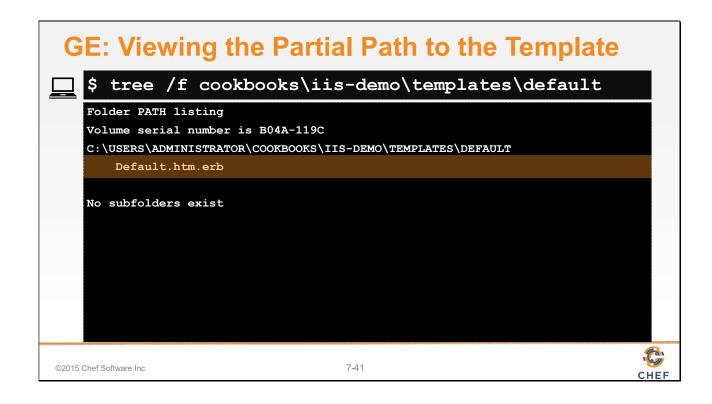
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So it's time to change the file resource to a template resource so that it can use the template file that we have defined.

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Lastly we need to specify a source attribute which contains that path to the template we generated. This path is relative starting from within the cookbook's template directory.

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To visualize that with 'tree' we can run it with a path that places us right at the templates directory. So the results will be relative paths from the point specified.

And we see the filepath Default.htm.erb.

Instructor Note: The default folder denotes that we want to use this file for all platforms.

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Now we have the path to our template so we can update the template resource's source attribute value.

Slide 43



Cleaner Recipes

Adding the node attributes to the default page did make it harder to read the recipe.

Objective:

- ✓ Create a template with chef generate
- ✓ Define the contents of the ERB template
- ✓ Change the file resource to the template resource in the 'iis-demo' cookbook

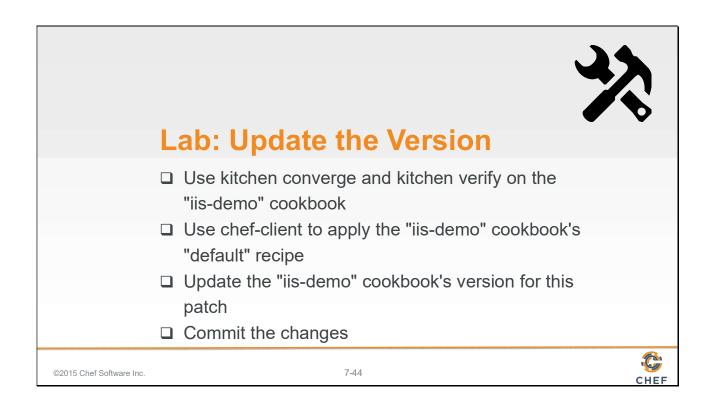
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We hopefully haven't changed the original goal of our recipe but we have made some changes.

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In this lab, you will use 'kitchen' to verify the cookbook and use 'chef-client' to apply the cookbook. If everything is working then update the patch number and commit the changes to version control.

Instructor Note: Allow 8 minutes to complete this exercise.

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```
Lab: Test the Cookbook

$ cd ~\cookbooks\iis-demo
$ kitchen converge
$ kitchen verify

----> Starting Kitchen (v1.4.2)
----> Setting up <default-windows-2012r2>...
Finished setting up <default-windows-2012r2> (0m0.00s).
----> Verifying <default-windows-2012r2>...

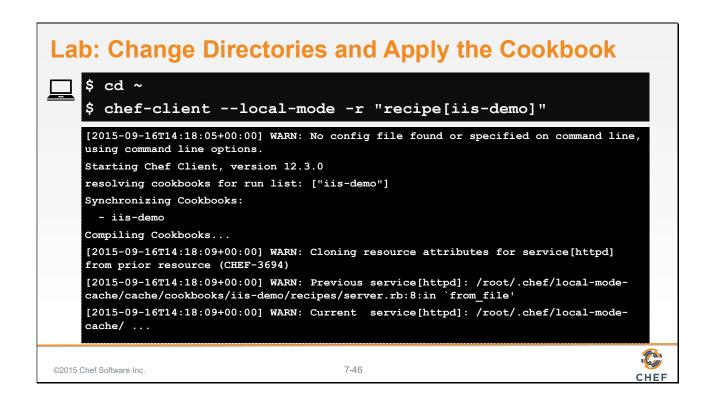
Finished in 1.69 seconds (files took 1.01 seconds to load)
2 examples, 0 failures

Finished verifying <default-windows-2012r2> (0m2.60s).
```

Since kitchen is a cookbook testing tool, you need to move into the cookbook's directory.

Then run the 'kitchen converge' and 'kitchen verify' command, addressing any issues if they show up.

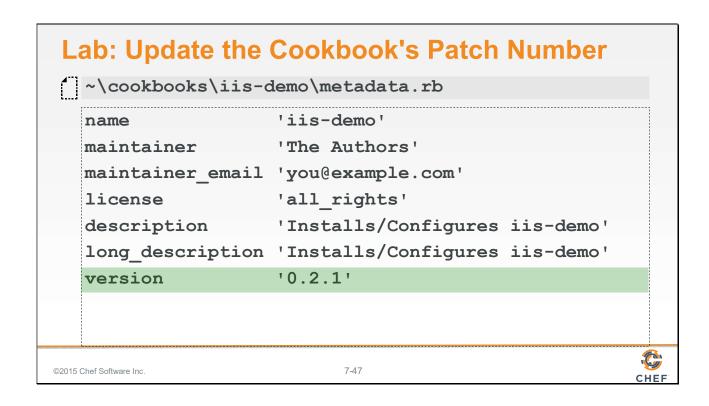
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When all the tests pass, return to the home directory, so you can execute 'chef-client'.

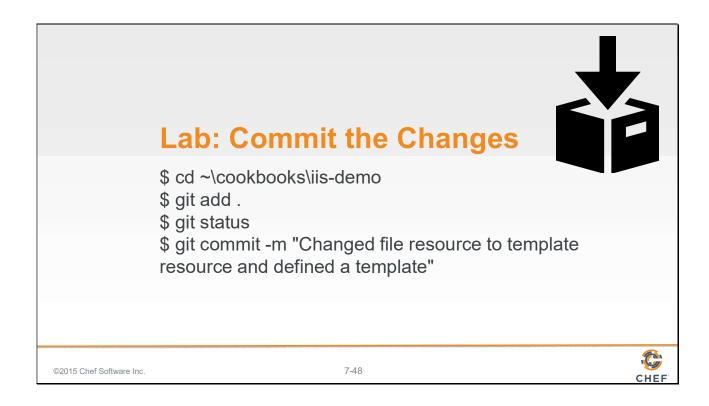
And then apply the iis-demo cookbook's default recipe to the local system.

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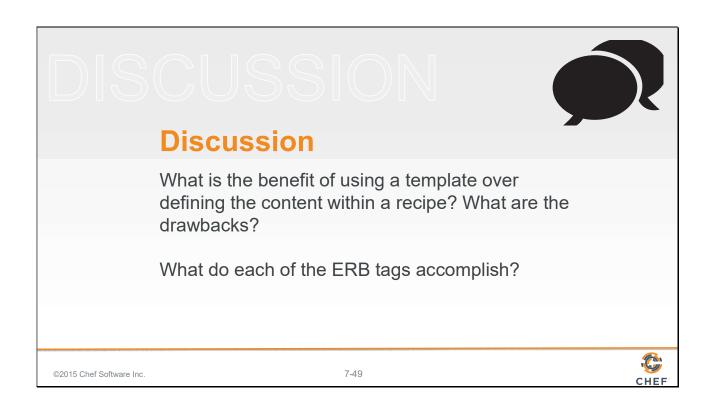
If everything converges correctly, update the version number. As mentioned previously, this is a patch fix.

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Return to the cookbook directory and add all the changed files and commit them with a message.

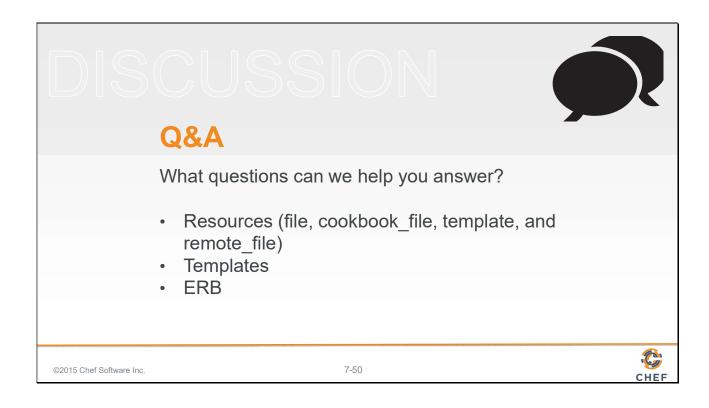
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Answer these questions.

With your answers, turn to another person and alternate asking each other these questions and sharing your answers.

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What questions can we help you answer?

Generally or specifically about resources, templates, and ERB.

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