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Managed Services Client Onboarding

BI

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Table of Contents

1. History and Revisions

Version	Date	Authors	Changes
v0.1	2019-01-03	Patrick McMahon	Initial version of the document

2. People involved in the engagement

Full name	email	Role	Company
Patrick McMahon	pmcmahon@redhat.com	Senior Consultant	Crossvale EMEA

2.1. Terminology

Table 1. Terminology Table

Term	Definition
RHEL	Red Hat Enterprise Linux
OCP	OpenShift Container Platform
HA	High Availability
VM	Virtual Machine
MSP	Managed Services

3. Preface

3.1. Confidentiality, Copyright, and Disclaimer

This document is not a quote and does not include any binding commitments by Crossvale. If acceptable, a formal quote can be issued upon request, which will include the scope of work, cost, and any customer requirements as necessary.

3.2. About This Document

This document is intended as a guide to onboard a new customer to Crossvale managed services. It aims to describe the production of the following components:

- Product Supportability Reports
- MSP Handover
- MSP Onboard & Account creation
- Engagement Journal

4. Product Supportability Reports

Each cluster that is supported by Redhat must have a supportability report. A supportability report runs through a list of checks to check for common errors or unsupported configurations. Examples of such reports can be found on here.

4.1. Generating Reports

The report generation process is semi-automated. There are a lot of improvements to made but for now the process automatically collects data and performs checks on that data. The generation of the report is manual.

- Clone the git repo that contains the supportability report generator

```
git clone git@github.com:crossvale-inc/msp-ocp.git
# or
git clone https://github.com/crossvale-inc/msp-ocp.git
```

- Change to dir `product-supportability-generator`
- From the bastion node run the `run.yml` playbook using the inventory file for the OCP cluster

```
ansible-playbook run.yml -i <inventory>
```

This will generate a file called `pssa-out.tar.gz` in the `scripts` directory. This file contains a tar file per node containing enough information about the cluster to generate our reports from.

- Create a file called `nodes.sh` in the `scripts` folder. It should contain 4 variables defining the classification of each node

```
MASTERNODES='master1 master2 master3'
ETCDNODES='master1 master2 master3'
INFRANODES='infranode1 infranode2'
NODES='worker1 worker2 worker3'
```

- Change directory to the `scripts` and extract the `pssa-out.tar.gz` file.

```
tar -xvzf pssa-out.tar.gz
```

- Change directory to `scripts` and run `extract_master_sos-reports.sh`. Each node's tar file should expand.

Once these steps are complete each check in the `scripts` directory can be executed starting with `check_1_1_rhsm_status.sh`.

The output of each check must be captured in a document. Use this document as a template.

NOTE	Some checks are buggy and not every document check has an associated script. For checks without a script this information can be deduced by exploring the sosreports, accessing the cluster directly or asking the customer.

4.2. Operational Procedure Checks

At the tail of the report template is a section to discuss day 2 operations with the customer. We like to have a look into host preparation and installation process (e.g. how/by which tooling are hosts installed), possible configuration management tools used (e.g. chef, puppet,..), as well as understand preparation for the day-2 operations. Request the following and detail as more information as possible:

- the Installation Procedure used for OpenShift hosts
- the usage of any additional Configuration Management Tools and their purpose
- the Health Checks performed
- the Pruning Strategy implemented
- the Patch Strategy
- the Upgrade Strategy
- the Certificate Management
- the Capacity Management
- the Monitoring of the cluster
- the Backup/Restore procedures implemented
- the Disaster Strategies planned and documented
- the Ansible inventory file used (Make a copy of this file if the customer allows)