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# Kubernetes Up & Running

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Brendan Burns,  
Joe Beda,  
Kelsey Hightower &  
Lachlan Evenson

# Chapter 6. Service Discovery

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## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the author’s raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 7th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

Kubernetes is a very dynamic system. The system is involved in placing Pods on nodes, making sure they are up and running, and rescheduling them as needed. There are ways to automatically change the number of Pods based on load (such as horizontal Pod autoscaling [see “[Autoscaling a ReplicaSet](#)”]). The API-driven nature of the system encourages others to create higher and higher levels of automation.

While the dynamic nature of Kubernetes makes it easy to run a lot of things, it creates problems when it comes to *finding* those things. Most of the traditional network infrastructure wasn’t built for the level of dynamism that Kubernetes presents.

## What Is Service Discovery?

The general name for this class of problems and solutions is *service discovery*. Service-discovery tools help solve the problem of finding which processes are listening at which addresses for which services. A good

service-discovery system will enable users to resolve this information quickly and reliably. A good system is also low-latency; clients are updated soon after the information associated with a service changes. Finally, a good service-discovery system can store a richer definition of what that service is. For example, perhaps there are multiple ports associated with the service.

The Domain Name System (DNS) is the traditional system of service discovery on the internet. DNS is designed for relatively stable name resolution with wide and efficient caching. It is a great system for the internet but falls short in the dynamic world of Kubernetes.

Unfortunately, many systems (for example, Java, by default) look up a name in DNS directly and never re-resolve. This can lead to clients caching stale mappings and talking to the wrong IP. Even with short TTLs and well-behaved clients, there is a natural delay between when a name resolution changes and when the client notices. There are natural limits to the amount and type of information that can be returned in a typical DNS query, too. Things start to break past 20–30 A records for a single name. SRV records solve some problems, but are often very hard to use. Finally, the way that clients handle multiple IPs in a DNS record is usually to take the first IP address and rely on the DNS server to randomize or round-robin the order of records. This is no substitute for more purpose-built load balancing.

## The Service Object

Real service discovery in Kubernetes starts with a Service object.

A Service object is a way to create a named label selector. As we will see, the Service object does some other nice things for us, too.

Just as the `kubectl run` command is an easy way to create a Kubernetes deployment, we can use `kubectl expose` to create a service. Let's create some deployments and services so we can see how they work:

```
$ kubectl run alpaca-prod \
--image=gcr.io/kuar-demo/kuard-amd64:blue \
```

```

--replicas=3 \
--port=8080 \
--labels="ver=1,app=alpaca,env=prod"
$ kubectl expose deployment alpaca-prod
$ kubectl run bandicoot-prod \
--image=gcr.io/kuar-demo/kuard-amd64:green \
--replicas=2 \
--port=8080 \
--labels="ver=2,app=bandicoot,env=prod"
$ kubectl expose deployment bandicoot-prod
$ kubectl get services -o wide

NAME           CLUSTER-IP      ... PORT(S)      ... SELECTOR
alpaca-prod    10.115.245.13  ... 8080/TCP   ...
app=alpaca,env=prod,ver=1
bandicoot-prod 10.115.242.3   ... 8080/TCP   ...
app=bandicoot,env=prod,ver=2
kubernetes     10.115.240.1   ... 443/TCP    ... <none>

```

After running these commands, we have three services. The ones we just created are `alpaca-prod` and `bandicoot-prod`. The `kubernetes` service is automatically created for you so that you can find and talk to the Kubernetes API from within the app.

If we look at the `SELECTOR` column, we see that the `alpaca-prod` service simply gives a name to a selector and specifies which ports to talk to for that service. The `kubectl expose` command will conveniently pull both the label selector and the relevant ports (8080, in this case) from the deployment definition.

Furthermore, that service is assigned a new type of virtual IP called a *cluster IP*. This is a special IP address the system will load-balance across all of the Pods that are identified by the selector.

To interact with services, we are going to port forward to one of the `alpaca` Pods. Start and leave this command running in a terminal window. You can see the port forward working by accessing the `alpaca` Pod at <http://localhost:48858>:

```

$ ALPACA_POD=$(kubectl get pods -l app=alpaca \
-o jsonpath='{.items[0].metadata.name}')
$ kubectl port-forward $ALPACA_POD 48858:8080

```

## Service DNS

Because the cluster IP is virtual, it is stable, and it is appropriate to give it a DNS address. All of the issues around clients caching DNS results no longer apply. Within a namespace, it is as easy as just using the service name to connect to one of the Pods identified by a service.

Kubernetes provides a DNS service exposed to Pods running in the cluster. This Kubernetes DNS service was installed as a system component when the cluster was first created. The DNS service is, itself, managed by Kubernetes and is a great example of Kubernetes building on Kubernetes. The Kubernetes DNS service provides DNS names for cluster IPs.

You can try this out by expanding the “DNS Query” section on the kuard server status page. Query the A record for alpaca-prod. The output should look something like this:

```
; opcode: QUERY, status: NOERROR, id: 12071
;; flags: qr aa rd ra; QUERY: 1, ANSWER: 1, AUTHORITY: 0,
ADDITIONAL: 0

;; QUESTION SECTION:
;alpaca-prod.default.svc.cluster.local. IN      A

;; ANSWER SECTION:
alpaca-prod.default.svc.cluster.local. 30      IN      A
10.115.245.13
```

The full DNS name here is alpaca-prod.default.svc.cluster.local.. Let's break this down:

*alpaca-prod*

The name of the service in question.

*default*

The namespace that this service is in.

*sVC*

Recognizing that this is a service. This allows Kubernetes to expose other types of things as DNS in the future.

*cluster.local.*

The base domain name for the cluster. This is the default and what you will see for most clusters. Administrators may change this to allow unique DNS names across multiple clusters.

When referring to a service in your own namespace you can just use the service name (`alpaca-prod`). You can also refer to a service in another namespace with `alpaca-prod.default`. And, of course, you can use the fully qualified service name (`alpaca-prod.default.svc.cluster.local.`). Try each of these out in the “DNS Query” section of kuard.

## Readiness Checks

Often, when an application first starts up it isn’t ready to handle requests. There is usually some amount of initialization that can take anywhere from under a second to several minutes. One nice thing the Service object does is track which of your Pods are ready via a readiness check. Let’s modify our deployment to add a readiness check that is attached to a Pod, as we discussed in [Chapter 4](#):

```
$ kubectl edit deployment/alpaca-prod
```

This command will fetch the current version of the `alpaca-prod` deployment and bring it up in an editor. After you save and quit your editor, it’ll then write the object back to Kubernetes. This is a quick way to edit an object without saving it to a YAML file.

Add the following section:

```
spec:  
  ...
```

```

template:
  ...
spec:
  containers:
    ...
      name: alpaca-prod
      readinessProbe:
        httpGet:
          path: /ready
          port: 8080
        periodSeconds: 2
        initialDelaySeconds: 0
        failureThreshold: 3
        successThreshold: 1

```

This sets up the Pods this deployment will create so that they will be checked for readiness via an HTTP GET to `/ready` on port 8080. This check is done every 2 seconds starting as soon as the Pod comes up. If three successive checks fail, then the Pod will be considered not ready. However, if only one check succeeds, the Pod will again be considered ready.

Only ready Pods are sent traffic.

Updating the deployment definition like this will delete and recreate the `alpaca` Pods. As such, we need to restart our `port-forward` command from earlier:

```

$ ALPACA_POD=$(kubectl get pods -l app=alpaca \
  -o jsonpath='{.items[0].metadata.name}')
$ kubectl port-forward $ALPACA_POD 48858:8080

```

Point your browser to `http://localhost:48858` and you should see the debug page for that instance of kuard. Expand the “Readiness Probe” section. You should see this page update every time there is a new readiness check from the system, which should happen every 2 seconds.

In another terminal window, start a `watch` command on the endpoints for the `alpaca-prod` service. Endpoints are a lower-level way of finding what a service is sending traffic to and are covered later in this chapter. The `--watch` option here causes the `kubectl` command to hang around and

output any updates. This is an easy way to see how a Kubernetes object changes over time:

```
$ kubectl get endpoints alpaca-prod --watch
```

Now go back to your browser and hit the “Fail” link for the readiness check. You should see that the server is now returning 500s. After three of these, this server is removed from the list of endpoints for the service. Hit the “Succeed” link and notice that after a single readiness check the endpoint is added back.

This readiness check is a way for an overloaded or sick server to signal to the system that it doesn’t want to receive traffic anymore. This is a great way to implement graceful shutdown. The server can signal that it no longer wants traffic, wait until existing connections are closed, and then cleanly exit.

Press Ctrl-C to exit out of both the `port-forward` and `watch` commands in your terminals.

## Looking Beyond the Cluster

So far, everything we’ve covered in this chapter has been about exposing services inside of a cluster. Oftentimes, the IPs for Pods are only reachable from within the cluster. At some point, we have to allow new traffic in!

The most portable way to do this is to use a feature called NodePorts, which enhance a service even further. In addition to a cluster IP, the system picks a port (or the user can specify one), and every node in the cluster then forwards traffic to that port to the service.

With this feature, if you can reach any node in the cluster you can contact a service. You use the NodePort without knowing where any of the Pods for that service are running. This can be integrated with hardware or software load balancers to expose the service further.

Try this out by modifying the `alpaca-prod` service:

```
$ kubectl edit service alpaca-prod
```

Change the `spec.type` field to `NodePort`. You can also do this when creating the service via `kubectl expose` by specifying `--type=NodePort`. The system will assign a new `NodePort`:

```
$ kubectl describe service alpaca-prod
```

```
Name:           alpaca-prod
Namespace:      default
Labels:         app=alpaca
                env=prod
                ver=1
Annotations:    <none>
Selector:       app=alpaca,env=prod,ver=1
Type:          NodePort
IP:            10.115.245.13
Port:          <unset> 8080/TCP
NodePort:       <unset> 32711/TCP
Endpoints:     10.112.1.66:8080,10.112.2.104:8080,10.112.2.105:8080
Session Affinity: None
No events.
```

Here we see that the system assigned port 32711 to this service. Now we can hit any of our cluster nodes on that port to access the service. If you are sitting on the same network, you can access it directly. If your cluster is in the cloud someplace, you can use SSH tunneling with something like this:

```
$ ssh <node> -L 8080:localhost:32711
```

Now if you point your browser to `http://localhost:8080` you will be connected to that service. Each request that you send to the service will be randomly directed to one of the Pods that implements the service. Reload the page a few times and you will see that you are randomly assigned to different Pods.

When you are done, exit out of the SSH session.

# Load Balancer Integration

If you have a cluster that is configured to integrate with external load balancers you can use the `LoadBalancer` type. This builds on the `NodePort` type by additionally configuring the cloud to create a new load balancer and direct it at nodes in your cluster. Most cloud-based Kubernetes clusters offer load balancer integration, and there are a number of projects that implement load balancer integration for common physical load-balancers as well, although these may require more manual integration with your cluster.

Edit the `alpaca-prod` service again (`kubectl edit service alpaca-prod`) and change `spec.type` to `LoadBalancer`.

## NOTE

Creating a service of type `LoadBalancer` exposes that service to the public internet. Before you do this, you should make certain that it is something that is secure to be exposed to everyone in the world. If you are concerned about the security risks, see the section on internal load balancers below. Additionally, the chapter on Kubernetes Policy and Pod Security cover more ways to secure your application

If you do a `kubectl get services` right away you'll see that the `EXTERNAL-IP` column for `alpaca-prod` now says `<pending>`. Wait a bit and you should see a public address assigned by your cloud. You can look in the console for your cloud account and see the configuration work that Kubernetes did for you:

```
$ kubectl describe service alpaca-prod

Name:           alpaca-prod
Namespace:      default
Labels:         app=alpaca
                env=prod
                ver=1
Selector:      app=alpaca,env=prod,ver=1
Type:          LoadBalancer
IP:            10.115.245.13
```

```

LoadBalancer Ingress: 104.196.248.204
Port: <unset> 8080/TCP
NodePort: <unset> 32711/TCP
Endpoints:
10.112.1.66:8080,10.112.2.104:8080,10.112.2.105:8080
Session Affinity: None
Events:
FirstSeen ... Reason Message
----- ... -----
3m ... Type NodePort -> LoadBalancer
3m ... CreatingLoadBalancer Creating load balancer
2m ... CreatedLoadBalancer Created load balancer

```

Here we see that we have an address of 104.196.248.204 now assigned to the alpaca-prod service. Open up your browser and try!

### NOTE

This example is from a cluster launched and managed on the Google Cloud Platform via GKE. However, the way a load balancer is configured is specific to a cloud. In addition, some clouds have DNS-based load balancers (e.g., AWS ELB). In this case you'll see a hostname here instead of an IP. Also, depending on the cloud provider, it may still take a little while for the load balancer to be fully operational.

Creating a cloud-based load balancer can take some time. Don't be surprised if it takes a few minutes on most cloud providers.

## Internal load balancers

The examples that we have seen so far use *external* load balancers, that is load balancers that are connected to the public internet. While this is great for exposing services to the world, many times you only want to expose your application within your private network. To achieve this you want to use an *internal* load balancer. Unfortunately, because support for internal load balancers was added more recently to Kubernetes it is done in a somewhat ad-hoc manner via object annotations. For example, to create an internal load balancer in an Azure Kubernetes Service cluster, you add the annotation `service.beta.kubernetes.io/azure-load-`

balancer-internal: "true" to your Service resource. Here are the settings for some popular clouds:

- Microsoft Azure: service.beta.kubernetes.io/azure-load-balancer-internal: "true"
- Amazon Web Services:  
service.beta.kubernetes.io/aws-load-balancer-internal: "true"
- Alibaba Cloud:  
service.beta.kubernetes.io/alibaba-cloud-loadbalancer-address-type: "intranet"
- Google Cloud Platform: cloud.google.com/load-balancer-type: "Internal"

When you add this annotation to your Service it should look like this:

```
...
metadata:
  ...
  name: some-service
  annotations:
    service.beta.kubernetes.io/azure-load-balancer-internal:
"true"
...
```

When you create a service with one of these annotations, an internally exposed service will be created instead of one on the public internet.

[NOTE]  
====  
There are several other annotations that extend LoadBalancer behavior, including ones for using a pre-existing IP address and others. The specific extensions for your provider should be documented on their web site.  
====

==== Advanced Details

Kubernetes is built to be an extensible system. As such, there are layers that allow for more advanced integrations.  
Understanding the details of how a sophisticated concept like services is implemented may help you troubleshoot or create more advanced integrations. This section goes a bit below the surface.

#### ===== Endpoints

Some applications (and the system itself) want to be able to use services without using a cluster IP.  
This is done with another type of object called an Endpoints object.  
For every Service object, Kubernetes creates a buddy Endpoints object that contains the IP addresses for that service:

```
++++
<pre data-type="programlisting">$ <strong>kubectl describe
endpoints alpaca-prod</strong>

Name:           alpaca-prod
Namespace:      default
Labels:         app=alpaca
                  env=prod
                  ver=1
Subsets:
Addresses:      10.112.1.54,10.112.2.84,10.112.2.85
NotReadyAddresses: &lt;none&gt;;
Ports:
  Name      Port      Protocol
  ----      ----      -----
  &lt;unset&gt;    8080      TCP

No events.</pre>
++++
```

To use a service, an advanced application can talk to the Kubernetes API directly to look up endpoints and call them. The Kubernetes API even has the capability to "watch" objects and be notified as soon as they change. In this way, a client can react immediately as soon as the IPs associated with a service change.  
((("IP addresses", "for watched service endpoints")))

Let's demonstrate this. In a terminal window, start the

following command and leave it running:

```
++++
<pre data-type="programlisting">$ <strong>kubectl get endpoints
alpaca-prod --watch</strong></pre>
++++
```

It will output the current state of the endpoint and then "hang":

```
-----
NAME           ENDPOINTS
AGE
alpaca-prod   10.112.1.54:8080,10.112.2.84:8080,10.112.2.85:8080
1m
-----
```

Now open up another terminal window and delete and recreate the deployment

**Backing `alpaca-prod`:**

```
++++
<pre data-type="programlisting">$ <strong>kubectl delete
deployment alpaca-prod</strong>
$ <strong>kubectl run alpaca-prod \
--image=gcr.io/kuar-demo/kuard-amd64:blue \
--replicas=3 \
--port=8080 \
--labels="ver=1,app=alpaca,env=prod"</strong></pre>
++++
```

If you look back at the output from the watched endpoint, you will see that as you deleted and re-created these Pods, the output of the command reflected the most up-to-date set of IP addresses associated with the service. Your output will look something like this:

```
-----
NAME           ENDPOINTS
AGE
alpaca-prod   10.112.1.54:8080,10.112.2.84:8080,10.112.2.85:8080
1m
alpaca-prod   10.112.1.54:8080,10.112.2.84:8080    1m
alpaca-prod   <none>      1m
alpaca-prod   10.112.2.90:8080    1m
alpaca-prod   10.112.1.57:8080,10.112.2.90:8080    1m
alpaca-prod   10.112.0.28:8080,10.112.1.57:8080,10.112.2.90:8080
1m
-----
```

The Endpoints object is great if you are writing new code that is built to run on Kubernetes from the start. But most projects aren't in this position! Most existing systems are built to work with regular old IP addresses that don't change that often.

#### ===== Manual Service Discovery

Kubernetes services are built on top of label selectors over Pods.(((("labels", "using in service discovery"))))(((("service discovery", "advanced details", "manual service discovery")))) That means that you can use the Kubernetes API to do rudimentary service discovery without using a Service object at all! Let's demonstrate.

**With `kubectl` (and via the API) we can easily see what IPs are assigned to each Pod in our example deployments:**

```
++++
<pre data-type="programlisting">$ <strong>kubectl get pods -o
wide --show-labels</strong>

NAME          ... IP          ... LABELS
alpaca-prod-12334-87f8h   ... 10.112.1.54 ...
app=alpaca,env=prod,ver=1
alpaca-prod-12334-jssmh   ... 10.112.2.84 ...
app=alpaca,env=prod,ver=1
alpaca-prod-12334-tjp56   ... 10.112.2.85 ...
app=alpaca,env=prod,ver=1
bandicoot-prod-5678-sbxzl ... 10.112.1.55 ...
app=bandicoot,env=prod,ver=2
bandicoot-prod-5678-x0dh8  ... 10.112.2.86 ...
app=bandicoot,env=prod,ver=2</pre>
++++
```

[role="pagebreak-after"]

This is great, but what if you have a ton of Pods? You'll probably want to filter this based on the labels applied as part of the deployment. Let's do that for just the +alpacat app:

```
++++
<pre data-type="programlisting">$ <strong>kubectl get pods -o
wide --selector=app=alpaca,env=prod</strong>

NAME          ... IP          ...
alpaca-prod-3408831585-bpzdz ... 10.112.1.54 ...
alpaca-prod-3408831585-kncwt ... 10.112.2.84 ...
alpaca-prod-3408831585-19fsq ... 10.112.2.85 ...</pre>
```

++++

At this point you have the basics of service discovery! You can always use labels to identify the set of Pods you are interested in, get all of the Pods for those labels, and dig out the IP address. But keeping the correct set of labels to use in sync can be tricky. This is why the Service object was created.

((("Service object")))

===== kube-proxy and Cluster IPs

Cluster IPs are stable virtual IPs that load-balance traffic across all of the endpoints in a service.(((("service discovery", "advanced details", "kube-proxy and cluster IPs")))((("kube-proxy", "cluster IPs and")))((("cluster IPs", "kube-proxy and"))))((("IP addresses", "kube-proxy and cluster IPs"))). This magic is performed by a component running on every node in the cluster called the `kube-proxy` (<>fig07in01>).

[[fig07in01]]

.Configuring and using a cluster IP

image:::images/kur2\_0701.png["Configuring and using a Cluster IP"]

In <>fig07in01>, the `kube-proxy` watches for new services in the cluster via the API server. ((("iptables rules"))). It then programs a set of +iptables+ rules in the kernel of that host to rewrite the destinations of packets so they are directed at one of the endpoints for that service. If the set of endpoints for a service changes (due to Pods coming and going or due to a failed readiness check), the set of +iptables+ rules is rewritten.

The cluster IP itself is usually assigned by the API server as the service is created. However, when creating the service, the user can specify a specific cluster IP. Once set, the cluster IP cannot be modified without deleting and recreating the Service object.

[NOTE]

=====

The Kubernetes service address range is configured using the `--service-cluster-ip-range` flag on the `kube-apiserver` binary.((("kube-apiserver, --service-cluster-ip-range flag"))). The service address range should not overlap with the IP subnets and ranges assigned to each Docker bridge or Kubernetes node.

In addition, any explicit cluster IP requested must come from that range and not already be in use.

=====

#### ===== Cluster IP Environment Variables

While most users should be using the DNS services to find cluster IPs, there are some older mechanisms that may still be in use.

```
((("cluster IPs", "environment variables")))((("service discovery", "advanced details", "cluster IP environment variables"))) One of these is injecting a set of environment variables into Pods as they start up.((("environment variables", "for cluster IPs")))
```

To see this in action, let's look at the console for the `+bandicoot+` instance of `+kuard+`. Enter the following commands in your terminal:

```
++++
<pre data-type="programlisting">$ <strong>BANDICOOT_POD=$(kubectl get pods -l app=bandicoot \
-o jsonpath='{.items[0].metadata.name}')</strong>
$ <strong>kubectl port-forward $BANDICOOT_POD 48858:8080</strong>
</pre>
++++
```

Now point your browser to `pass:[<span><em>http://localhost:48858</em></span>]` to see the status page for this server. Expand the "Server Env" section and note the set of environment variables for the `+alpacat` service. The status page should show a table similar to <<S.E.V.\_Table>>.

```
[[S.E.V._Table]]
.Service environment variables
[options="header"]
| ======
| Key | Value
| `ALPACA_PROD_PORT` | `tcp://10.115.245.13:8080`
| `ALPACA_PROD_PORT_8080_TCP` | `tcp://10.115.245.13:8080`
| `ALPACA_PROD_PORT_8080_TCP_ADDR` | `10.115.245.13`
| `ALPACA_PROD_PORT_8080_TCP_PORT` | `8080`
| `ALPACA_PROD_PORT_8080_TCP_PROTO` | `tcp`
| `ALPACA_PROD_SERVICE_HOST` | `10.115.245.13`
| `ALPACA_PROD_SERVICE_PORT` | `8080`
| ======
```

The two main environment variables to use are ``ALPACA_PROD_SERVICE_HOST`` and ``ALPACA_PROD_SERVICE_PORT``. The other environment variables are created to be compatible with (now deprecated) Docker link variables.

A problem with the environment variable approach is that it requires resources to be created in a specific order. The services must be created before the Pods that reference them. This can introduce quite a bit of complexity when deploying a set of services that make up a larger application. In addition, using `_just_` environment variables seems strange to many users. For this reason, DNS is probably a better option.((( "service discovery", "advanced details", startref="ix\_serdisadv")))

#### ==== Connecting with Other Environments

While it is great to have service discovery within your own cluster, many real-world applications actually require that you integrate more cloud-native applications deployed in Kubernetes with applications deployed to more legacy environments.((( "service discovery", "connecting with other environments")))) Additionally, you may need to integrate a Kubernetes cluster in the cloud with infrastructure that has been deployed on-premise. This is an area of Kubernetes that is still undergoing a fair amount of exploration and development of solutions.

===== Connnecting to resources outside of a cluster  
When you are connecting Kubernetes to legacy resources outside of the cluster, you can use selector-less services to declare a Kubernetes service with a manually assigned IP address that is outside of the cluster. That way, Kubernetes service discovery via DNS works as expected, but the network traffic itself flows to an external resource. To create a selector-less service you remove the `'spec.selector'` field from your resource, while leaving the `'metadata'` and the `'ports'` sections unchanged. Because your service has no selector, no endpoints are automatically added to the service. This means that you must add them manually. Typically the endpoint that you will add will be a fixed IP address (e.g. the IP address of your database server) so you only need to add it once. But if the IP address that backs the service ever changes you will need to update the corresponding endpoint resource. To create or update the endpoint resource, you use an endpoint that looks something like

the following:

```
++++  
apiVersion: v1  
kind: Endpoints  
metadata:  
  # this name must match the name of your service  
  name: my-database-server  
subsets:  
  - addresses:  
    # replace this IP with the real IP of your server  
    - ip: 1.2.3.4  
  ports:  
    # replace this port with the port(s) you want to expose  
    - port: 1433  
++++
```

===== Connecting external resources to services inside a cluster

Connecting external resources to Kubernetes services is somewhat trickier.`((("resources", "external, connecting to Kubernetes services")))`

If your cloud provider supports it, the easiest thing to do is to create

an "internal" load balancer as described above,  
that lives in your virtual private network and  
can deliver traffic from a fixed IP address into the cluster. You  
can then

use traditional DNS to make this IP address available to the  
external resource. If an internal load balancer isn't available,  
you can use a `NodePort` service to expose the service on the IP  
addresses of the nodes

in the cluster. You can then either program a physical load-  
balancer

to serve traffic to those nodes, or use DNS-based load-balancing  
to spread  
traffic between the nodes.

If neither of those solutions work for your use case, there are  
more complex options include running the full `+kube-proxy+` on an  
external

resource and program that machine to use the DNS server in the  
Kubernetes

cluster.`((("kube-proxy")))` Such a setup is significantly more  
difficult to get right and

should really only be used in on-premise environments. There are  
also a

variety of open source projects (for example, HashiCorp's Consul)

that can be used to manage connectivity between in-cluster and out-of-cluster resources. Such options should really be considered a last resort and require significant knowledge of both networking and Kubernetes to get right.

```
// === Integrating with external DNS providers
//
// TODO: Info here
// === Adding external Services
// TODO: Info here

==== Cleanup
```

**Run the following command to clean up all of the objects created in this chapter:**

```
++++
<pre data-type="programlisting">$ <strong>kubectl delete
services,deployments -l app</strong></pre>
++++
```

==== Summary

Kubernetes is a dynamic system that challenges traditional methods of naming and connecting services over the network. The Service object provides a flexible and powerful way to expose services both within the cluster and beyond. With the techniques covered here you can connect services to each other and expose them outside the cluster.

While using the dynamic service discovery mechanisms in Kubernetes introduces some new concepts and may, at first, seem complex, understanding and adapting these techniques is key to unlocking the power of Kubernetes. Once your application can dynamically find services and react to the dynamic placement of those applications, you are free to stop worrying about where things are running and when they move. It is a critical piece of the puzzle to start to think about services in a logical way and let Kubernetes take care of the details of container placement.  
((( "service discovery", startref="ix\_serdis")))

Of course, Service discovery is just the beginning of how application networking works with Kubernetes. The following chapter is on

Ingress networking which is dedicated to layer 7 (HTTP) load balancing and routing and later on in the book there is a chapter on Service Meshes which are a more recently developed approach to cloud native networking that provide many additional capabilities in addition to Service Discovery and load balancing.

# VMware Tanzu

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# **Kubernetes: Up and Running**

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# **Kubernetes: Up and Running**

by Brendan Burns, Joe Beda, Kelsey Hightower, and Lachlan Evenson

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# Chapter 1. Creating and Running Containers

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This will be the 2nd chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

Kubernetes is a platform for creating, deploying and managing distributed applications. These applications come in many different shapes and sizes, but ultimately, they are all comprised of one or more programs that run on individual machines. These programs accept input, manipulate data, and then return the results. Before we can even consider building a distributed system, we must first consider how to build the *application container images* that contain these programs and make up the pieces of our distributed system.

Application programs are typically comprised of a language runtime, libraries, and your source code. In many cases, your application relies on external shared libraries such as `libc` and `libssl`. These external libraries are generally shipped as shared components in the OS that you have installed on a particular machine.

This dependency on shared libraries causes problems when an application developed on a programmer's laptop has a dependency on a shared library that isn't available when the program is rolled out to the production OS. Even when the development and production environments share the exact same version of the OS, problems can occur when developers forget to include dependent asset files inside a package that they deploy to production.

The traditional methods of running multiple programs on a single machine require that all of these programs share the same versions of shared libraries on the system. If the different programs are developed by different teams or organizations, these shared dependencies add needless complexity and coupling between these teams.

A program can only execute successfully if it can be reliably deployed onto the machine where it should run. Too often the state of the art for deployment involves running imperative scripts, which inevitably have twisty and byzantine failure cases. This makes the task of rolling out a new version of all or parts of a distributed system a labor-intensive and difficult task.

In [Link to Come], we argued strongly for the value of immutable images and infrastructure. This immutability is exactly what the container image provides. As we will see, it easily solves all the problems of dependency management and encapsulation just described.

When working with applications it's often helpful to package them in a way that makes it easy to share them with others. Docker, the default tool most people use for containers makes it easy to package an executable and push it to a remote registry where it can later be pulled by others. At the time of writing, container registries are available in all of the major public clouds, and services to build images in the cloud are also available in many of them. You can also run your own registry using open source or commercial systems. These registries make it easy for users to manage and deploy private images, while image-builder services provide easy integration with continuous delivery systems.

For this chapter, and the remainder of the book, we are going to work with a simple example application that we built to help show this workflow in action. You can find the application [on GitHub](#).

Container images bundle a program and its dependencies into a single artifact under a root filesystem. The most popular container image format is the Docker image format, which has been standardized by the Open Container Initiative to the OCI image format. Kubernetes supports both Docker- and OCI-compatible images via Docker and other runtimes. Docker images also include additional metadata used by a container runtime to start a running application instance based on the contents of the container image.

This chapter covers the following topics:

- How to package an application using the Docker image format
- How to start an application using the Docker container runtime

## Container Images

For nearly everyone, their first interaction with any container technology is with a container image. A *container image* is a binary package that encapsulates all of the files necessary to run a program inside of an OS container. Depending on how you first experiment with containers, you will either build a container image from your local filesystem or download a preexisting image from a *container registry*. In either case, once the container image is present on your computer, you can run that image to produce a running application inside an OS container.

### The Docker Image Format

The most popular and widespread container image format is the Docker image format, which was developed by the Docker open source project for packaging, distributing, and running containers using the `docker` command. Subsequently, work has begun by Docker, Inc., and others to

standardize the container image format via the Open Container Initiative (OCI) project. While the OCI standard achieved a 1.0 release milestone in mid-2017, adoption of these standards is proceeding slowly. The Docker image format continues to be the de facto standard, and is made up of a series of filesystem layers. Each layer adds, removes, or modifies files from the preceding layer in the filesystem. This is an example of an *overlay* filesystem. The overlay system is used both when packaging up the image and when the image is actually being used. During runtime, there are a variety of different concrete implementations of such filesystems, including `aufs`, `overlay`, and `overlay2`.

## CONTAINER LAYERING

The phrases “Docker image format” and “container images” may be a bit confusing. The image isn’t a single file but rather a specification for a manifest file that points to other files. The manifest and associated files are often treated by users as a unit. The level of indirection allows for more efficient storage and transmittal. Associated with this format is an API for uploading and downloading images to an image registry.

Container images are constructed with a series of filesystem layers, where each layer inherits and modifies the layers that came before it. To help explain this in detail, let’s build some containers. Note that for correctness the ordering of the layers should be bottom up, but for ease of understanding we take the opposite approach:

```
.  
└ container A: a base operating system only, such as Debian  
    └ container B: build upon #A, by adding Ruby v2.1.10  
    └ container C: build upon #A, by adding Golang v1.6
```

At this point we have three containers: A, B, and C. B and C are *forked* from A and share nothing besides the base container’s files. Taking it further, we can build on top of B by adding Rails (version 4.2.6). We may also want to support a legacy application that requires an older version of Rails (e.g., version 3.2.x). We can build a container image to support that application based on B also, planning to someday migrate the app to version 4:

```
. (continuing from above)  
└ container B: build upon #A, by adding Ruby v2.1.10  
    └ container D: build upon #B, by adding Rails v4.2.6  
    └ container E: build upon #B, by adding Rails v3.2.x
```

Conceptually, each container image layer builds upon a previous one. Each parent reference is a pointer. While the example here is a simple set of containers, other real-world containers can be part of a larger extensive directed acyclic graph.

Container images are typically combined with a container configuration file, which provides instructions on how to set up the container environment and execute an application entry point. The container configuration often includes information on how to set up networking, namespace isolation, resource constraints (cgroups), and what `syscall` restrictions should be placed on a running container instance. The container root filesystem and configuration file are typically bundled using the Docker image format.

Containers fall into two main categories:

- System containers
- Application containers

System containers seek to mimic virtual machines and often run a full boot process. They often include a set of system services typically found in a VM, such as `ssh`, `cron`, and `syslog`. When Docker was new, these types of containers were much more common. Over time, they have come to be seen as poor practice and application containers have gained favor.

Application containers differ from system containers in that they commonly run a single program. While running a single program per container might seem like an unnecessary constraint, it provides the perfect level of granularity for composing scalable applications and is a design philosophy that is leveraged heavily by Pods. We will examine how Pods work in detail in [Chapter 4](#).

## Building Application Images with Docker

In general, container orchestration systems like Kubernetes are focused on building and deploying distributed systems made up of application containers. Consequently, we will focus on application containers for the remainder of this chapter.

### Dockerfiles

A Dockerfile can be used to automate the creation of a Docker container image.

Let's start by building an application image for a simple Node.js program. This example would be very similar for many other dynamic languages, like Python or Ruby.

The simplest of npm/Node/Express apps has two files: *package.json* ([Example 1-1](#)) and *server.js* ([Example 1-2](#)). Put these in a directory and then run `npm install express --save` to establish a dependency on Express and install it.

---

#### *Example 1-1. package.json*

---

```
{  
  "name": "simple-node",  
  "version": "1.0.0",  
  "description": "A sample simple application for Kubernetes Up &  
Running",  
  "main": "server.js",  
  "scripts": {  
    "start": "node server.js"  
  },  
  "author": ""  
}
```

---

#### *Example 1-2. server.js*

---

```
var express = require('express');  
  
var app = express();  
app.get('/', function (req, res) {  
  res.send('Hello World!');  
});  
app.listen(3000, function () {  
  console.log('Listening on port 3000!');  
  console.log('  http://localhost:3000');  
});
```

To package this up as a Docker image we need to create two additional files: *.dockerignore* ([Example 1-3](#)) and the Dockerfile ([Example 1-4](#)). The Dockerfile is a recipe for how to build the container image, while *.dockerignore* defines the set of files that should be ignored when copying

files into the image. A full description of the syntax of the Dockerfile is available on the [Docker website](#).

#### Example 1-3. `.dockerignore`

---

```
node_modules
```

#### Example 1-4. `Dockerfile`

---

```
# Start from a Node.js 16 (LTS) image ❶
FROM node:16

# Specify the directory inside the image in which all commands will
# run ❷
WORKDIR /usr/src/app

# Copy package files and install dependencies ❸
COPY package*.json ./
RUN npm install
RUN npm install express

# Copy all of the app files into the image ❹
COPY . .

# The default command to run when starting the container ❺
CMD [ "npm", "start" ]
```

- ❶ Every Dockerfile builds on other container images. This line specifies that we are starting from the `node:16` image on the Docker Hub. This is a preconfigured image with Node.js 16.
- ❷ This line sets the work directory, in the container image, for all following commands.
- ❸ These two lines initialize the dependencies for Node.js. First we copy the package files into the image. This will include `package.json` and `package-lock.json`. The `RUN` command then runs the correct command *in the container* to install the necessary dependencies.
- ❹ Now we copy the rest of the program files into the image. This will include everything except `node_modules`, as that is excluded via the `.dockerignore` file.

- ⑤ Finally, we specify the command that should be run when the container is run.

Run the following command to create the `simple-node` Docker image:

```
$ docker build -t simple-node .
```

When you want to run this image, you can do it with the following command. You can navigate to `http://localhost:3000` to access the program running in the container:

```
$ docker run --rm -p 3000:3000 simple-node
```

At this point our `simple-node` image lives in the local Docker registry where the image was built and is only accessible to a single machine. The true power of Docker comes from the ability to share images across thousands of machines and the broader Docker community.

## Optimizing Image Sizes

There are several gotchas that come when people begin to experiment with container images that lead to overly large images. The first thing to remember is that files that are removed by subsequent layers in the system are actually still present in the images; they're just inaccessible. Consider the following situation:

```
.  
└─ layer A: contains a large file named 'BigFile'  
    └─ layer B: removes 'BigFile'  
        └─ layer C: builds on B by adding a static binary
```

You might think that `BigFile` is no longer present in this image. After all, when you run the image, it is no longer accessible. But in fact it is still present in layer A, which means that whenever you push or pull the image,

*BigFile* is still transmitted through the network, even if you can no longer access it.

Another pitfall that people fall into revolves around image caching and building. Remember that each layer is an independent delta from the layer below it. Every time you change a layer, it changes every layer that comes after it. Changing the preceding layers means that they need to be rebuilt, repushed, and repulled to deploy your image to development.

To understand this more fully, consider two images:

```
.  
└ layer A: contains a base OS  
    └ layer B: adds source code server.js  
        └ layer C: installs the 'node' package
```

versus:

```
.  
└ layer A: contains a base OS  
    └ layer B: installs the 'node' package  
        └ layer C: adds source code server.js
```

It seems obvious that both of these images will behave identically, and indeed the first time they are pulled they do. However, consider what happens when *server.js* changes. In one case, it is only the change that needs to be pulled or pushed, but in the other case, both *server.js* and the layer providing the *node* package need to be pulled and pushed, since the *node* layer is dependent on the *server.js* layer. In general, you want to order your layers from least likely to change to most likely to change in order to optimize the image size for pushing and pulling. This is why, in [Example 1-4](#), we copy the *package\*.json* files and install dependencies before copying the rest of the program files. A developer is going to update and change the program files much more often than the dependencies.

## Image Security

When it comes to security, there are no shortcuts. When building images that will ultimately run in a production Kubernetes cluster, be sure to follow best practices for packaging and distributing applications. For example, don't build containers with passwords baked in—and this includes not just in the final layer, but any layers in the image. One of the counterintuitive problems introduced by container layers is that deleting a file in one layer doesn't delete that file from preceding layers. It still takes up space, and it can be accessed by anyone with the right tools—an enterprising attacker can simply create an image that only consists of the layers that contain the password.

Secrets and images should *never* be mixed. If you do so, you will be hacked, and you will bring shame to your entire company or department. We all want to be on TV someday, but there are better ways to go about that.

Additionally, because container images are narrowly focused on running individual applications, a best practice for container images is to minimize the files within the container image. Every additional library in an image provides a potential vector for vulnerabilities to appear in your application. Depending on the language, you can achieve very small images with a very tight set of dependencies. This smaller set ensures that your image isn't exposed to vulnerabilities in libraries it would never use.

## Multistage Image Builds

One of the most common ways to accidentally build large images is to do the actual program compilation as part of the construction of the application container image. Compiling code as part of the image build feels natural, and it is the easiest way to build a container image from your program. The trouble with doing this is that it leaves all of the unnecessary development tools, which are usually quite large, lying around inside of your image and slowing down your deployments.

To resolve this problem, Docker introduced *multistage builds*. With multistage builds, rather than producing a single image, a Dockerfile can

actually produce multiple images. Each image is considered a stage. Artifacts can be copied from preceding stages to the current stage.

To illustrate this concretely, we will look at how to build our example application, kuard. This is a somewhat complicated application that involves a React.js frontend (with its own build process) that then gets embedded into a Go program. The Go program runs a backend API server that the React.js frontend interacts with.

A simple Dockerfile might look like this:

```
FROM golang:1.17-alpine

# Install Node and NPM
RUN apk update && apk upgrade && apk add --no-cache git nodejs
bash npm

# Get dependencies for Go part of build
RUN go get -u github.com/jteeuwen/go-bindata/...
RUN go get github.com/tools/godep
RUN go get github.com/kubernetes-up-and-running/kuard

WORKDIR /go/src/github.com/kubernetes-up-and-running/kuard

# Copy all sources in
COPY . .

# This is a set of variables that the build script expects
ENV VERBOSE=0
ENV PKG=github.com/kubernetes-up-and-running/kuard
ENV ARCH=amd64
ENV VERSION=test

# Do the build. This script is part of incoming sources.
RUN build/build.sh

CMD [ "/go/bin/kuard" ]
```

This Dockerfile produces a container image containing a static executable, but it also contains all of the Go development tools and the tools to build the React.js frontend and the source code for the application, neither of which are needed by the final application. The image, across all layers, adds up to over 500 MB.

To see how we would do this with multistage builds, examine this multistage Dockerfile:

```
# STAGE 1: Build
FROM golang:1.17-alpine AS build

# Install Node and NPM
RUN apk update && apk upgrade && apk add --no-cache git nodejs
bash npm

# Get dependencies for Go part of build
RUN go get -u github.com/jteeuwen/go-bindata/...
RUN go get github.com/tools/godep

WORKDIR /go/src/github.com/kubernetes-up-and-running/kuard

# Copy all sources in
COPY . .

# This is a set of variables that the build script expects
ENV VERBOSE=0
ENV PKG=github.com/kubernetes-up-and-running/kuard
ENV ARCH=amd64
ENV VERSION=test

# Do the build. Script is part of incoming sources.
RUN build/build.sh

# STAGE 2: Deployment
FROM alpine

USER nobody:nobody
COPY --from=build /go/bin/kuard /kuard

CMD [ "/kuard" ]
```

This Dockerfile produces two images. The first is the *build* image, which contains the Go compiler, React.js toolchain, and source code for the program. The second is the *deployment* image, which simply contains the compiled binary. Building a container image using multistage builds can reduce your final container image size by hundreds of megabytes and thus dramatically speed up your deployment times, since generally, deployment

latency is gated on network performance. The final image produced from this Dockerfile is somewhere around 20 MB.

You can build and run this image with the following commands:

```
$ docker build -t kuard .
$ docker run --rm -p 8080:8080 kuard
```

## Storing Images in a Remote Registry

What good is a container image if it's only available on a single machine?

Kubernetes relies on the fact that images described in a Pod manifest are available across every machine in the cluster. One option for getting this image to all machines in the cluster would be to export the `kuard` image and import it on each of them. We can't think of anything more tedious than managing Docker images this way. The process of manually importing and exporting Docker images has human error written all over it. Just say no!

The standard within the Docker community is to store Docker images in a remote registry. There are tons of options when it comes to Docker registries, and what you choose will be largely based on your needs in terms of security and collaboration features.

Generally speaking, the first choice you need to make regarding a registry is whether to use a private or a public registry. Public registries allow anyone to download images stored in the registry, while private registries require authentication to download images. In choosing public versus private, it's helpful to consider your use case.

Public registries are great for sharing images with the world, because they allow for easy, unauthenticated use of the container images. You can easily distribute your software as a container image and have confidence that users everywhere will have the exact same experience.

In contrast, a private registry is best for storing applications that are private to your service and that you don't want the world to use.

Regardless, to push an image, you need to authenticate to the registry. You can generally do this with the `docker login` command, though there are some differences for certain registries. In the examples here we are pushing to the Google Cloud Platform registry, called the Google Container Registry (GCR); other clouds, including Azure and Amazon Web Services (AWS), also have hosted container registries. For new users hosting publicly readable images, the [Docker Hub](#) is a great place to start.

Once you are logged in, you can tag the `kuard` image by prepending the target Docker registry. You can also append another identifier that is usually used for the version or variant of that image, separated by a colon (:):

```
$ docker tag kuard gcr.io/kuar-demo/kuard-amd64:blue
```

Then you can push the `kuard` image:

```
$ docker push gcr.io/kuar-demo/kuard-amd64:blue
```

Now that the `kuard` image is available on a remote registry, it's time to deploy it using Docker. When we pushed the image to GCR, it was marked as public, so it will be available everywhere without authentication.

## The Container Runtime Interface

Kubernetes provides an API for describing an application deployment, but relies on a container runtime to set up an application container using the container-specific APIs native to the target OS. On a Linux system that means configuring cgroups and namespaces. The interface to this container runtime is defined by the Container Runtime Interface (CRI) standard. The CRI API is implemented by a number of different programs, including the `containerd-cri` built by Docker and the `cri-o` implementation contributed by Red Hat. When you install the `docker` tooling the `containerd` runtime is also installed and used by the Docker daemon.

Starting with release 1.25 of Kubernetes, only container runtimes that support the container runtime interface will work with Kubernetes. Fortunately, managed Kubernetes provides have made this transition nearly automatic for users of managed Kubernetes.

## Running Containers with Docker

Though generally in Kubernetes containers are launched by a daemon on each node called the *kubelet*, it's easier to get started with containers using the Docker command-line tool. The Docker CLI tool can be used to deploy containers. To deploy a container from the `gcr.io/kuar-demo/kuard-amd64:blue` image, run the following command:

```
$ docker run -d --name kuard \
  --publish 8080:8080 \
  gcr.io/kuar-demo/kuard-amd64:blue
```

This command starts the `kuard` container and maps port 8080 on your local machine to 8080 in the container. The `--publish` option can be shortened to `-p`. This forwarding is necessary because each container gets its own IP address, so listening on *localhost* inside the container doesn't cause you to listen on your machine. Without the port forwarding, connections will be inaccessible to your machine. The `-d` option specifies that this should run in the background (daemon), while `--name kuard` gives the container a friendly name.

## Exploring the `kuard` Application

`kuard` exposes a simple web interface, which you can load by pointing your browser at `http://localhost:8080` or via the command line:

```
$ curl http://localhost:8080
```

`kuard` also exposes a number of interesting functions that we will explore later on in this book.

## **Limiting Resource Usage**

Docker provides the ability to limit the amount of resources used by applications by exposing the underlying cgroup technology provided by the Linux kernel. These capabilities are likewise used by Kubernetes to limit the resources used by each Pod.

### **Limiting memory resources**

One of the key benefits to running applications within a container is the ability to restrict resource utilization. This allows multiple applications to coexist on the same hardware and ensures fair usage.

To limit kuard to 200 MB of memory and 1 GB of swap space, use the `--memory` and `--memory-swap` flags with the `docker run` command.

Stop and remove the current kuard container:

```
$ docker stop kuard
$ docker rm kuard
```

Then start another kuard container using the appropriate flags to limit memory usage:

```
$ docker run -d --name kuard \
--publish 8080:8080 \
--memory 200m \
--memory-swap 1G \
gcr.io/kuar-demo/kuard-amd64:blue
```

If the program in the container uses too much memory, it will be terminated.

### **Limiting CPU resources**

Another critical resource on a machine is the CPU. Restrict CPU utilization using the `--cpu-shares` flag with the `docker run` command:

```
$ docker run -d --name kuard \
--publish 8080:8080 \
```

```
--memory 200m \
--memory-swap 1G \
--cpu-shares 1024 \
gcr.io/kuar-demo/kuard-amd64:blue
```

## Cleanup

Once you are done building an image, you can delete it with the `docker rmi` command:

```
docker rmi <tag-name>
```

or:

```
docker rmi <image-id>
```

Images can either be deleted via their tag name (e.g., `gcr.io/kuar-demo/kuard-amd64:blue`) or via their image ID. As with all ID values in the `docker` tool, the image ID can be shortened as long as it remains unique. Generally only three or four characters of the ID are necessary.

It's important to note that unless you explicitly delete an image it will live on your system forever, *even* if you build a new image with an identical name. Building this new image simply moves the tag to the new image; it doesn't delete or replace the old image.

Consequently, as you iterate while you are creating a new image, you will often create many, many different images that end up taking up unnecessary space on your computer.

To see the images currently on your machine, you can use the `docker images` command. You can then delete tags you are no longer using.

Docker provides a tool called `docker system prune` for doing general cleanup. This will remove all stopped containers, all untagged images, and all unused image layers cached as part of the build process. Use it carefully.

A slightly more sophisticated approach is to set up a `cron` job to run an image garbage collector. For example, you can easily run `docker system prune` as a recurring `cron` job, once per day or once per hour, depending on how many images you are creating.

## Summary

Application containers provide a clean abstraction for applications, and when packaged in the Docker image format, applications become easy to build, deploy, and distribute. Containers also provide isolation between applications running on the same machine, which helps avoid dependency conflicts.

In future chapters we'll see how the ability to mount external directories means we can run not only stateless applications in a container, but also applications like `mysql` and others that generate lots of data.

# Chapter 2. Deploying a Kubernetes Cluster

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This will be the 3rd chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

Now that you have successfully built an application container, the next step is to learn how to transform it into a complete, reliable, scalable distributed system. To do that, you need a working Kubernetes cluster. At this point, there are cloud-based Kubernetes services in most public clouds that make it easy to create a cluster with a few command-line instructions. We highly recommend this approach if you are just getting started with Kubernetes. Even if you are ultimately planning on running Kubernetes on bare metal, it’s a good way to quickly get started with Kubernetes, learn about Kubernetes itself, and then learn how to install it on physical machines. Furthermore, managing a Kubernetes cluster is a complicated task in itself, and for most people it makes sense to defer this management to the cloud—especially when in most clouds the management service is free.

Of course, using a cloud-based solution requires paying for those cloud-based resources as well as having an active network connection to the

cloud. For these reasons, local development can be more attractive, and in that case the `minikube` tool provides an easy-to-use way to get a local Kubernetes cluster up running in a VM on your local laptop or desktop. Though this is a nice option, `minikube` only creates a single-node cluster, which doesn't quite demonstrate all of the aspects of a complete Kubernetes cluster. For that reason, we recommend people start with a cloud-based solution, unless it really doesn't work for their situation. A more recent alternative is to run a Docker-in-Docker cluster, which can spin up a multi-node cluster on a single machine. This project is still in beta, though, so keep in mind that you may encounter unexpected issues.

If you truly insist on starting on bare metal, [Link to Come] at the end of this book gives instructions for building a cluster from a collection of Raspberry Pi single-board computers. These instructions use the `kubeadm` tool and can be adapted to other machines beyond Raspberry Pis.

## Installing Kubernetes on a Public Cloud Provider

This chapter covers installing Kubernetes on the three major cloud providers: Amazon Web Services, Microsoft Azure, and the Google Cloud Platform.

If you choose to use a cloud provider to manage Kubernetes, you only need to install one of these options; once you have a cluster configured and ready to go you can skip to “[The Kubernetes Client](#)”, unless you would prefer to install Kubernetes elsewhere.

## Google Kubernetes Engine

The Google Cloud Platform offers a hosted Kubernetes-as-a-Service called Google Kubernetes Engine (GKE). To get started with GKE, you need a Google Cloud Platform account with billing enabled and the [gcloud](#) tool installed.

Once you have `gcloud` installed, first set a default zone:

```
$ gcloud config set compute/zone us-west1-a
```

Then you can create a cluster:

```
$ gcloud container clusters create kuar-cluster --num-nodes=3
```

This will take a few minutes. When the cluster is ready you can get credentials for the cluster using:

```
$ gcloud container clusters get-credentials kuar-cluster
```

If you run into trouble, you can find the complete instructions for creating a GKE cluster in the [Google Cloud Platform documentation](#).

## Installing Kubernetes with Azure Kubernetes Service

Microsoft Azure offers a hosted Kubernetes-as-a-Service as part of the Azure Container Service. The easiest way to get started with Azure Container Service is to use the built-in Azure Cloud Shell in the Azure portal. You can activate the shell by clicking the shell icon in the upper-right toolbar:



The shell has the `az` tool automatically installed and configured to work with your Azure environment.

Alternatively, you can [install the az command-line interface \(CLI\) on your local machine](#).

When you have the shell up and working, you can run:

```
$ az group create --name=kuar --location=westus
```

Once the resource group is created, you can create a cluster using:

```
$ az aks create --resource-group=kuar --name=kuar-cluster
```

This will take a few minutes. Once the cluster is created, you can get credentials for the cluster with:

```
$ az aks get-credentials --resource-group=kuar --name=kuar-cluster
```

If you don't already have the `kubectl` tool installed, you can install it using:

```
$ az aks install-cli
```

You can find complete instructions for installing Kubernetes on Azure in the [Azure documentation](#).

## Installing Kubernetes on Amazon Web Services

Amazon offers a managed Kubernetes service called Elastic Kubernetes Service (EKS). The easiest way to create an EKS cluster is via the [open source `eksctl` command-line tool](#)..

Once you have `eksctl` installed and in your path, you can run the following command to create a cluster:

```
$ eksctl create cluster --name kuar-cluster ...
```

For more details on installation options (such as node size and more), view the help using this command:

```
$ eksctl create cluster --help
```

The cluster installation includes the right configuration for the `kubectl` command-line tool. If you don't already have `kubectl` installed, you can follow the instructions in the [documentation](#).

# Installing Kubernetes Locally Using minikube

If you need a local development experience, or you don't want to pay for cloud resources, you can install a simple single-node cluster using minikube.

Alternatively, if you have already installed Docker Desktop, it comes bundled with a single-machine installation of Kubernetes.

While minikube (or Docker Desktop) is a good simulation of a Kubernetes cluster, it's really intended for local development, learning, and experimentation. Because it only runs in a VM on a single node, it doesn't provide the reliability of a distributed Kubernetes cluster.

In addition, certain features described in this book require integration with a cloud provider. These features are either not available or work in a limited way with minikube.

## NOTE

You need to have a hypervisor installed on your machine to use minikube. For Linux and macOS, this is generally `virtualbox`. On Windows, the Hyper-V hypervisor is the default option. Make sure you install the hypervisor before using minikube.

You can find the minikube tool on [GitHub](#). There are binaries for Linux, macOS, and Windows that you can download. Once you have the minikube tool installed, you can create a local cluster using:

```
$ minikube start
```

This will create a local VM, provision Kubernetes, and create a local `kubectl` configuration that points to that cluster.

When you are done with your cluster, you can stop the VM with:

```
$ minikube stop
```

If you want to remove the cluster, you can run:

```
$ minikube delete
```

## Running Kubernetes in Docker

A different approach to running a Kubernetes cluster has been developed more recently, which uses Docker containers to simulate multiple Kubernetes nodes instead of running everything in a virtual machine. The [kind project](#) provides a great experience for launching and managing test clusters in Docker. (*kind* stands for Kubernetes IN Docker.) kind is still a work in progress (pre 1.0), but is widely used by those building Kubernetes for fast and easy testing.

Installation instructions for your platform can be found [at the kind site](#). Once you get it installed, creating a cluster is as easy as:

```
$ kind create cluster --wait 5m \
$ export KUBECONFIG="$(kind get kubeconfig-path)"
$ kubectl cluster-info
$ kind delete cluster
```

## Running Kubernetes on Raspberry Pi

If you want to experiment with a realistic Kubernetes cluster but don't want to pay a lot, a very nice Kubernetes cluster can be built on top of Raspberry Pi computers for a relatively small cost. The details of building such a cluster are out of scope for this chapter, but they are given in [Link to Come] at the end of this book.

## The Kubernetes Client

The official Kubernetes client is `kubectl`: a command-line tool for interacting with the Kubernetes API. `kubectl` can be used to manage most Kubernetes objects, such as Pods, ReplicaSets, and Services. `kubectl` can also be used to explore and verify the overall health of the cluster.

We'll use the `kubectl` tool to explore the cluster you just created.

## Checking Cluster Status

The first thing you can do is check the version of the cluster that you are running:

```
$ kubectl version
```

This will display two different versions: the version of the local `kubectl` tool, as well as the version of the Kubernetes API server.

### NOTE

Don't worry if these versions are different. The Kubernetes tools are backward- and forward-compatible with different versions of the Kubernetes API, so long as you stay within two minor versions for both the tools and the cluster and don't try to use newer features on an older cluster. Kubernetes follows the semantic versioning specification, where the minor version is the middle number (e.g., the 18 in 1.18.2). However, you will want to make sure that you are within the supported version skew, which is three versions. If you are not, you may run into problems.

Now that we've established that you can communicate with your Kubernetes cluster, we'll explore the cluster in more depth.

First, you can get a simple diagnostic for the cluster. This is a good way to verify that your cluster is generally healthy:

```
$ kubectl get componentstatuses
```

The output should look like this:

NAME	STATUS	MESSAGE	ERROR
scheduler	Healthy	ok	
controller-manager	Healthy	ok	
etcd-0	Healthy	{"health": "true"}	

### NOTE

As Kubernetes changes and improves over time, the output of the `kubectl` command sometimes changes. Don't worry if the output doesn't look exactly identical to what is shown in the examples in this book.

You can see here the components that make up the Kubernetes cluster. The `controller-manager` is responsible for running various controllers that regulate behavior in the cluster; for example, ensuring that all of the replicas of a service are available and healthy. The `scheduler` is responsible for placing different Pods onto different nodes in the cluster. Finally, the `etcd` server is the storage for the cluster where all of the API objects are stored.

## Listing Kubernetes Worker Nodes

Next, you can list out all of the nodes in your cluster:

```
$ kubectl get nodes
NAME      STATUS    ROLES           AGE     VERSION
kube0     Ready     control-plane,master   45d    v1.22.4
kube1     Ready     <none>          45d    v1.22.4
kube2     Ready     <none>          45d    v1.22.4
kube3     Ready     <none>          45d    v1.22.4
```

You can see this is a four-node cluster that's been up for 45 days. In Kubernetes, nodes are separated into `control-plane` nodes that contain containers like the API server, scheduler, etc., which manage the cluster, and `worker` nodes where your containers will run. Kubernetes won't generally schedule work onto `control-plane` nodes to ensure that user workloads don't harm the overall operation of the cluster.

You can use the `kubectl describe` command to get more information about a specific node, such as `node-1`:

```
$ kubectl describe nodes kube1
```

First, you see basic information about the node:

Name:	kube1
Role:	
Labels:	beta.kubernetes.io/arch=arm beta.kubernetes.io/os=linux kubernetes.io/hostname=node-1

You can see that this node is running the Linux OS and is running on an ARM processor.

Next, you see information about the operation of `kube1` itself (dates have been removed from this output for conciseness)

Conditions:			
Type	Status	Reason	...
Message			
-----	-----	-----	-----
-----	-----	-----	-----
NetworkUnavailable	False	FlannelIsUp	...
Flannel is running on this node			
MemoryPressure	False	KubeletHasSufficientMemory	...
kubelet has sufficient memory available			
DiskPressure	False	KubeletHasNoDiskPressure	...
kubelet has no disk pressure			
PIDPressure	False	KubeletHasSufficientPID	...
kubelet has sufficient PID available			
Ready	True	KubeletReady	...
kubelet is posting ready status. AppArmor enabled			

These statuses show that the node has sufficient disk and memory space and is reporting that it is healthy to the Kubernetes master. Next, there is information about the capacity of the machine:

Capacity:	
alpha.kubernetes.io/nvidia-gpu:	0

```

cpu:                      4
memory:                  882636Ki
pods:                     110
Allocatable:
alpha.kubernetes.io/nvidia-gpu:      0
cpu:                           4
memory:                      882636Ki
pods:                        110

```

Then there is information about the software on the node, including the version of Docker that is running, the versions of Kubernetes and the Linux kernel, and more:

```

System Info:
Machine ID:          44d8f5dd42304af6acde62d233194cc6
System UUID:          c8ab697e-fc7e-28a2-7621-
94c691120fb9
Boot ID:              e78d015d-81c2-4876-ba96-
106a82da263e
Kernel Version:       4.19.0-18-amd64
OS Image:             Debian GNU/Linux 10 (buster)
Operating System:     linux
Architecture:         amd64
Container Runtime Version: containerd://1.4.12
Kubelet Version:       v1.22.4
Kube-Proxy Version:    v1.22.4
PodCIDR:               10.244.1.0/24
PodCIDRs:              10.244.1.0/24

```

Finally, there is information about the Pods that are currently running on this node:

Non-terminated Pods:		(3 in total)		
Namespace	Name	CPU Requests	CPU Limits	Memory Requests
Memory Limits				
-----	-----	-----	-----	-----
kube-system	kube-dns...	260m (6%)	0 (0%)	140Mi (16%)
	220Mi (25%)			
kube-system	kube-fla...	0 (0%)	0 (0%)	0 (0%)
0 (0%)				
kube-system	kube-pro...	0 (0%)	0 (0%)	0 (0%)
0 (0%)				
Allocated resources:				

```
(Total limits may be over 100 percent, i.e., overcommitted.  
CPU Requests CPU Limits      Memory Requests Memory Limits  
----- -----  
 260m (6%)    0 (0%)        140Mi (16%)   220Mi (25%)  
No events.
```

From this output you can see the Pods on the node (e.g., the `kube-dns` Pod that supplies DNS services for the cluster), the CPU and memory that each Pod is requesting from the node, as well as the total resources requested. It's worth noting here that Kubernetes tracks both the *requests* and upper *limits* for resources for each Pod that runs on a machine. The difference between requests and limits is described in detail in [Chapter 4](#), but in a nutshell, resources requested by a Pod are guaranteed to be present on the node, while a Pod's limit is the maximum amount of a given resource that a Pod can consume. A Pod's limit can be higher than its request, in which case the extra resources are supplied on a best-effort basis. They are not guaranteed to be present on the node.

## Cluster Components

One of the interesting aspects of Kubernetes is that many of the components that make up the Kubernetes cluster are actually deployed using Kubernetes itself. We'll take a look at a few of these. These components use a number of the concepts that we'll introduce in later chapters. All of these components run in the `kube-system` namespace.<sup>1</sup>

### Kubernetes Proxy

The Kubernetes proxy is responsible for routing network traffic to load-balanced services in the Kubernetes cluster. To do its job, the proxy must be present on every node in the cluster. Kubernetes has an API object named `DaemonSet`, which you will learn about later in the book, that is used in many clusters to accomplish this. If your cluster runs the Kubernetes proxy with a `DaemonSet`, you can see the proxies by running:

```
$ kubectl get daemonSets --namespace=kube-system kube-proxy
NAME          DESIRED   CURRENT   READY   UP-TO-DATE   AVAILABLE   AGE
NODE SELECTOR
kube-proxy     5         5         5       5           5           5
kubernetes.io/os=linux  45d
```

Depending on how your cluster is set up, the DaemonSet for the `kube-proxy` may be named something else, or it's possible that it won't use a DaemonSet at all. Regardless, the `kube-proxy` container should be running on all nodes in a cluster.

## Kubernetes DNS

Kubernetes also runs a DNS server, which provides naming and discovery for the services that are defined in the cluster. This DNS server also runs as a replicated service on the cluster. Depending on the size of your cluster, you may see one or more DNS servers running in your cluster. The DNS service is run as a Kubernetes deployment, which manages these replicas (this may also be named `coredns` or some other variant)

```
$ kubectl get deployments --namespace=kube-system core-dns
NAME      DESIRED   CURRENT   UP-TO-DATE   AVAILABLE   AGE
core-dns   1         1         1           1           45d
```

There is also a Kubernetes service that performs load balancing for the DNS server:

```
$ kubectl get services --namespace=kube-system core-dns
NAME      CLUSTER-IP   EXTERNAL-IP   PORT(S)      AGE
core-dns  10.96.0.10  <none>        53/UDP,53/TCP  45d
```

This shows that the DNS service for the cluster has the address 10.96.0.10. If you log in to a container in the cluster, you'll see that this has been populated into the `/etc/resolv.conf` file for the container.

## Kubernetes UI

If you want to visualize your cluster in a graphical user interface, most of the cloud providers integrate such a visualization into the GUI for their cloud. If your cloud provider doesn't provide such a UI, or you prefer an in-cluster GUI, there is a community supported GUI that you can install. Documentation on how to install the dashboard for these clusters is available at <https://kubernetes.io/docs/tasks/access-application-cluster/web-ui-dashboard/>. You can also use extensions for development environments like Visual Studio Code to see the state of your cluster at a glance.

## Summary

Hopefully at this point you have a Kubernetes cluster (or three) up and running and you've used a few commands to explore the cluster you have created. Next, we'll spend some more time exploring the command-line interface to that Kubernetes cluster and teach you how to master the `kubectl` tool. Throughout the rest of the book, you'll be using `kubectl` and your test cluster to explore the various objects in the Kubernetes API.

---

<sup>1</sup> As you'll learn in the next chapter, a namespace in Kubernetes is an entity for organizing Kubernetes resources. You can think of it like a folder in a filesystem.

# Chapter 3. Common kubectl Commands

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The `kubectl` command-line utility is a powerful tool, and in the following chapters you will use it to create objects and interact with the Kubernetes API. Before that, however, it makes sense to go over the basic `kubectl` commands that apply to all Kubernetes objects.

## Namespaces

Kubernetes uses *namespaces* to organize objects in the cluster. You can think of each namespace as a folder that holds a set of objects. By default, the `kubectl` command-line tool interacts with the `default` namespace. If you want to use a different namespace, you can pass `kubectl` the `--namespace` flag. For example, `kubectl --namespace=mystuff` references objects in the `mystuff` namespace. If you want to interact with

all namespaces—for example, to list all Pods in your cluster—you can pass the `--all-namespaces` flag.

## Contexts

If you want to change the default namespace more permanently, you can use a *context*. This gets recorded in a `kubectl` configuration file, usually located at `$HOME/.kube/config`. This configuration file also stores how to both find and authenticate to your cluster. For example, you can create a context with a different default namespace for your `kubectl` commands using:

```
$ kubectl config set-context my-context --namespace=mystuff
```

This creates a new context, but it doesn't actually start using it yet. To use this newly created context, you can run:

```
$ kubectl config use-context my-context
```

Contexts can also be used to manage different clusters or different users for authenticating to those clusters using the `--users` or `--clusters` flags with the `set-context` command.

## Viewing Kubernetes API Objects

Everything contained in Kubernetes is represented by a RESTful resource. Throughout this book, we refer to these resources as *Kubernetes objects*. Each Kubernetes object exists at a unique HTTP path; for example, `https://your-k8s.com/api/v1/namespaces/default/pods/my-pod` leads to the representation of a Pod in the default namespace named `my-pod`. The `kubectl` command makes HTTP requests to these URLs to access the Kubernetes objects that reside at these paths.

The most basic command for viewing Kubernetes objects via `kubectl` is `get`. If you run `kubectl get <resource-name>` you will get a listing of all resources in the current namespace. If you want to get a specific resource, you can use `kubectl get <resource-name> <obj-name>`.

By default, `kubectl` uses a human-readable printer for viewing the responses from the API server, but this human-readable printer removes many of the details of the objects to fit each object on one terminal line. One way to get slightly more information is to add the `-o wide` flag, which gives more details, on a longer line. If you want to view the complete object, you can also view the objects as raw JSON or YAML using the `-o json` or `-o yaml` flags, respectively.

A common option for manipulating the output of `kubectl` is to remove the headers, which is often useful when combining `kubectl` with Unix pipes (e.g., `kubectl ... | awk ...`). If you specify the `--no-headers` flag, `kubectl` will skip the headers at the top of the human-readable table.

Another common task is extracting specific fields from the object. `kubectl` uses the JSONPath query language to select fields in the returned object. The complete details of JSONPath are beyond the scope of this chapter, but as an example, this command will extract and print the IP address of the specified Pod:

```
$ kubectl get pods my-pod -o jsonpath --template={.status.podIP}
```

You can also view multiple objects of different types by using a comma separated list of types, for example:

```
$ kubectl get pods,services
```

This will display all pods and services for a given namespace.

If you are interested in more detailed information about a particular object, use the `describe` command:

```
$ kubectl describe <resource-name> <obj-name>
```

This will provide a rich multiline human-readable description of the object as well as any other relevant, related objects and events in the Kubernetes cluster.

If you would like to see a list of supported fields for each supported type of Kubernetes object you can use the `explain` command.

```
$ kubectl explain pods
```

Sometimes you want to continually observe the state of a particular Kubernetes resource to see changes to the resource when they occur. For example you might be waiting for your application to restart. The `--watch` flag enables this. You can add this flag to any `kubectl get` command to continuously monitor the state of a particular resource.

## Creating, Updating, and Destroying Kubernetes Objects

Objects in the Kubernetes API are represented as JSON or YAML files. These files are either returned by the server in response to a query or posted to the server as part of an API request. You can use these YAML or JSON files to create, update, or delete objects on the Kubernetes server.

Let's assume that you have a simple object stored in `obj.yaml`. You can use `kubectl` to create this object in Kubernetes by running:

```
$ kubectl apply -f obj.yaml
```

Notice that you don't need to specify the resource type of the object; it's obtained from the object file itself.

Similarly, after you make changes to the object, you can use the `apply` command again to update the object:

```
$ kubectl apply -f obj.yaml
```

The `apply` tool will only modify objects that are different from the current objects in the cluster. If the objects you are creating already exist in the cluster, it will simply exit successfully without making any changes. This makes it useful for loops where you want to ensure the state of the cluster matches the state of the filesystem. You can repeatedly use `apply` to reconcile state.

If you want to see what the `apply` command will do without actually making the changes, you can use the `--dry-run` flag to print the objects to the terminal without actually sending them to the server.

### NOTE

If you feel like making interactive edits instead of editing a local file, you can instead use the `edit` command, which will download the latest object state and then launch an editor that contains the definition:

```
$ kubectl edit <resource-name> <obj-name>
```

After you save the file, it will be automatically uploaded back to the Kubernetes cluster.

The `apply` command also records the history of previous configurations in an annotation within the object. You can manipulate these records with the `edit-last-applied`, `set-last-applied`, and `view-last-applied` commands. For example:

```
$ kubectl apply -f myobj.yaml view-last-applied
```

will show you the last state that was applied to the object.

When you want to delete an object, you can simply run:

```
$ kubectl delete -f obj.yaml
```

It is important to note that `kubectl` will not prompt you to confirm the deletion. Once you issue the command, the object *will* be deleted.

Likewise, you can delete an object using the resource type and name:

```
$ kubectl delete <resource-name> <obj-name>
```

## Labeling and Annotating Objects

Labels and annotations are tags for your objects. We'll discuss the differences in [Chapter 5](#), but for now, you can update the labels and annotations on any Kubernetes object using the `annotate` and `label` commands. For example, to add the `color=red` label to a Pod named `bar`, you can run:

```
$ kubectl label pods bar color=red
```

The syntax for annotations is identical.

By default, `label` and `annotate` will not let you overwrite an existing label. To do this, you need to add the `--overwrite` flag.

If you want to remove a label, you can use the `<label-name>-` syntax:

```
$ kubectl label pods bar color-
```

This will remove the `color` label from the Pod named `bar`.

## Debugging Commands

`kubectl` also makes a number of commands available for debugging your containers. You can use the following to see the logs for a running container:

```
$ kubectl logs <pod-name>
```

If you have multiple containers in your Pod, you can choose the container to view using the `-c` flag.

By default, `kubectl logs` lists the current logs and exits. If you instead want to continuously stream the logs back to the terminal without exiting, you can add the `-f` (follow) command-line flag.

You can also use the `exec` command to execute a command in a running container:

```
$ kubectl exec -it <pod-name> -- bash
```

This will provide you with an interactive shell inside the running container so that you can perform more debugging.

If you don't have bash or some other terminal available within your container, you can always attach to the running process:

```
$ kubectl attach -it <pod-name>
```

This will attach to the running process. It is similar to `kubectl logs` but will allow you to send input to the running process, assuming that process is set up to read from standard input.

You can also copy files to and from a container using the `cp` command:

```
$ kubectl cp <pod-name>:</path/to/remote/file>
</path/to/local/file>
```

This will copy a file from a running container to your local machine. You can also specify directories, or reverse the syntax to copy a file from your local machine back out into the container.

If you want to access your Pod via the network, you can use the `port-forward` command to forward network traffic from the local machine to the Pod. This enables you to securely tunnel network traffic through to

containers that might not be exposed anywhere on the public network. For example, the following command:

```
$ kubectl port-forward <pod-name> 8080:80
```

opens up a connection that forwards traffic from the local machine on port 8080 to the remote container on port 80.

### NOTE

You can also use the `port-forward` command with services by specifying `services/<service-name>` instead of `<pod-name>`, but note that if you do `port-forward` to a service, the requests will only ever be forwarded to a single Pod in that service. They will not go through the service load balancer.

If you want to view Kubernetes events, you can use the `kubectl get events` command to see a list of the latest 10 events on all objects in a given namespace.

```
$ kubectl get events
```

Additionally, you can stream events as they happen by adding `--watch` to the `kubectl get events` command. You may also wish to include `-A` to see events in all namespaces.

Finally, if you are interested in how your cluster is using resources, you can use the `top` command to see the list of resources in use by either nodes or Pods. This command:

```
kubectl top nodes
```

will display the total CPU and memory in use by the nodes in terms of both absolute units (e.g., cores) and percentage of available resources (e.g., total number of cores). Similarly, this command:

```
kubectl top pods
```

will show all Pods and their resource usage. By default it only displays Pods in the current namespace, but you can add the `--all-namespaces` flag to see resource usage by all Pods in the cluster.

## Cluster Management

The `kubectl` tool can also be used to manage the cluster itself. The most common action that people take to manage their cluster is to `cordon` and `drain` a particular node. When you `cordon` a node you prevent future Pods from being scheduled onto that machine. When you `drain` a node, you remove any Pods that are currently running on that machine. A good example use case for these commands would be removing a physical machine for repairs or upgrades. In that scenario, you can use `kubectl cordon` followed by `kubectl drain` to safely remove the machine from the cluster. Once the machine is repaired you can use `kubectl uncordon` to re-enable Pods scheduling onto the node. There is no `undrain` command, Pods will naturally get scheduled onto the empty node as they are created. For something quick affecting a node (e.g. a machine reboot) it is generally unnecessary to `cordon` or `drain`, it's only necessary if the machine will be out of service long enough that you want the Pods to move to a different machine.

## Command Autocompletion

`kubectl` supports integration with your shell to enable tab completion for both commands and resources. Depending on your environment, you may need to install the `bash-completion` package before you activate command autocompletion. You can do this using the appropriate package manager:

```
# macOS
brew install bash-completion

# CentOS/Red Hat
```

```
yum install bash-completion  
  
# Debian/Ubuntu  
apt-get install bash-completion
```

When installing on macOS, make sure to follow the instructions from brew about how to activate tab completion using your `$(HOME)/.bash_profile`.

Once `bash-completion` is installed, you can temporarily activate it for your terminal using:

```
source <(kubectl completion bash)
```

To make this automatic for every terminal, you can add it to your `$(HOME)/.bashrc` file:

```
echo "source <(kubectl completion bash)" >> $(HOME)/.bashrc
```

If you use zsh you can find similar instructions [online](#).

## Alternative Ways of Viewing Your Cluster

In addition to `kubectl`, there are other tools for interacting with your Kubernetes cluster.

For example, there are plug-ins for several editors that integrate Kubernetes and the editor environment, including:

- Visual Studio Code
- IntelliJ
- Eclipse

If you are using a managed Kubernetes service most of them also feature a graphical interface to Kubernetes integrated into their web-based user experience. Managed Kubernetes in the public cloud also integrates with

sophisticated monitoring tools that can help you gain insights into how your applications are running.

## Summary

`kubectl` is a powerful tool for managing your applications in your Kubernetes cluster. This chapter has illustrated many of the common uses for the tool, but `kubectl` has a great deal of built-in help available. You can start viewing this help with:

```
$ kubectl help
```

or:

```
$ kubectl help <command-name>
```

# Chapter 4. Pods

---

## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the authors’ raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 5th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

In earlier chapters we discussed how you might go about containerizing your application, but in real-world deployments of containerized applications you will often want to colocate multiple applications into a single atomic unit, scheduled onto a single machine.

A canonical example of such a deployment is illustrated in [Figure 4-1](#), which consists of a container serving web requests and a container synchronizing the filesystem with a remote Git repository.

# My Serving Pod

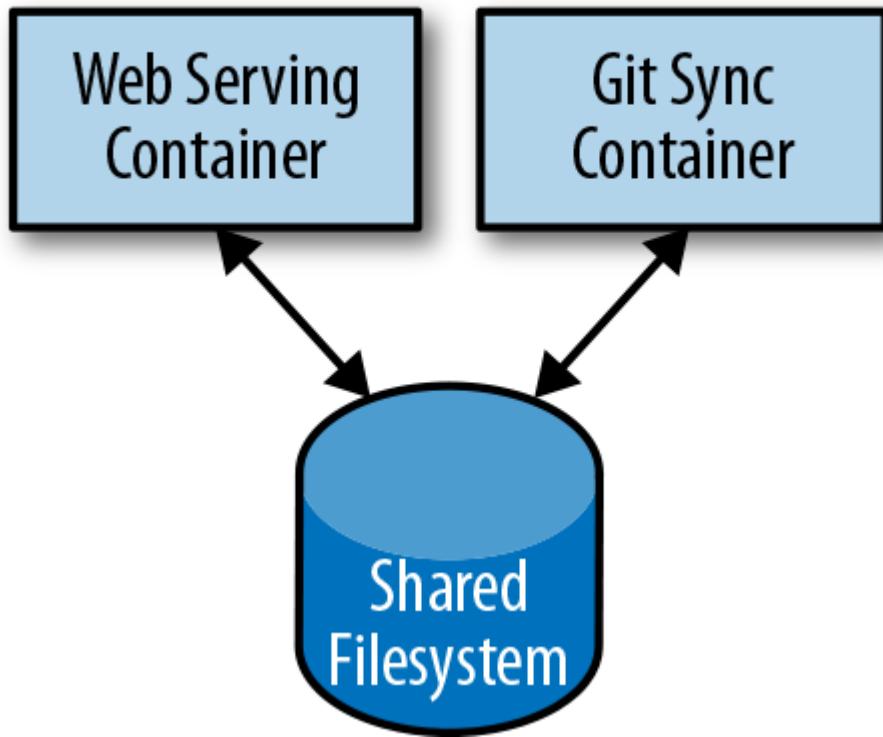


Figure 4-1. An example Pod with two containers and a shared filesystem

At first, it might seem tempting to wrap both the web server and the Git synchronizer into a single container. After closer inspection, however, the reasons for the separation become clear. First, the two containers have significantly different requirements in terms of resource usage. Take, for example, memory: Because the web server is serving user requests, we want to ensure that it is always available and responsive. On the other hand, the Git synchronizer isn't really user-facing and has a "best effort" quality of service.

Suppose that our Git synchronizer has a memory leak. We need to ensure that the Git synchronizer cannot use up memory that we want to use for our web server, since this can affect performance or even crash the server.

This sort of resource isolation is exactly the sort of thing that containers are designed to accomplish. By separating the two applications into two separate containers, we can ensure reliable web server operation.

Of course, the two containers are quite symbiotic; it makes no sense to schedule the web server on one machine and the Git synchronizer on another. Consequently, Kubernetes groups multiple containers into a single atomic unit called a *Pod*. (The name goes with the whale theme of Docker containers, since a Pod is also a group of whales.)

### NOTE

Though the grouping of multiple containers into a single Pod seemed controversial or confusing when it was first introduced in Kubernetes, it has subsequently been adopted by a variety of different applications to deploy their infrastructure. For example, several service mesh implementations use a second *sidecar* container to inject network management into an application's Pod.

## Pods in Kubernetes

A Pod is a collection of application containers and volumes running in the same execution environment. Pods, not containers, are the smallest deployable artifact in a Kubernetes cluster. This means all of the containers in a Pod always land on the same machine.

Each container within a Pod runs in its own cgroup, but they share a number of Linux namespaces.

Applications running in the same Pod share the same IP address and port space (network namespace), have the same hostname (UTS namespace), and can communicate using native interprocess communication channels over System V IPC or POSIX message queues (IPC namespace). However, applications in different Pods are isolated from each other; they have different IP addresses, hostnames, and more. Containers in different Pods running on the same node might as well be on different servers.

## Thinking with Pods

One of the most common questions people ask when adopting Kubernetes is “What should I put in a Pod?”

Sometimes people see Pods and think, “Aha! A WordPress container and a MySQL database container join together to make a WordPress instance. They should be in the same Pod.” However, this kind of Pod is actually an example of an anti-pattern for Pod construction. There are two reasons for this. First, WordPress and its database are not truly symbiotic. If the WordPress container and the database container land on different machines, they still can work together quite effectively, since they communicate over a network connection. Secondly, you don’t necessarily want to scale WordPress and the database as a unit. WordPress itself is mostly stateless so you may want to scale your WordPress frontends in response to frontend load by creating more WordPress Pods. Scaling a MySQL database is much trickier, and you would be much more likely to increase the resources dedicated to a single MySQL Pod. If you group the WordPress and MySQL containers together in a single Pod, you are forced to use the same scaling strategy for both containers, which doesn’t fit well.

In general, the right question to ask yourself when designing Pods is, “Will these containers work correctly if they land on different machines?” If the answer is “no,” a Pod is the correct grouping for the containers. If the answer is “yes,” multiple Pods is probably the correct solution. In the example at the beginning of this chapter, the two containers interact via a local filesystem. It would be impossible for them to operate correctly if the containers were scheduled on different machines.

In the remaining sections of this chapter, we will describe how to create, introspect, manage, and delete Pods in Kubernetes.

## The Pod Manifest

Pods are described in a Pod *manifest*, which is just a text-file representation of the Kubernetes API object. Kubernetes strongly believes in *declarative configuration*, which means that you write down the desired state of the

world in a configuration and then submit that configuration to a service that takes actions to ensure the desired state becomes the actual state.

## NOTE

Declarative configuration is different from *imperative configuration*, where you simply take a series of actions (for example, `apt-get install foo`) to modify the state of a system. Years of production experience have taught us that maintaining a written record of the system’s desired state leads to a more manageable, reliable system. Declarative configuration has numerous advantages such as enabling code review for configurations and documenting the current state of the system for distributed teams. Additionally, it is the basis for all of the self-healing behaviors in Kubernetes that keep applications running without user action.

The Kubernetes API server accepts and processes Pod manifests before storing them in persistent storage (`etcrd`). The scheduler also uses the Kubernetes API to find Pods that haven’t been scheduled to a node. It then places the Pods onto nodes depending on the resources and other constraints expressed in the Pod manifests. The scheduler can place multiple Pods on the same machine as long as there are sufficient resources. However, scheduling multiple replicas of the same application onto the same machine is worse for reliability, since the machine is a single failure domain. Consequently, the Kubernetes scheduler tries to ensure that Pods from the same application are distributed onto different machines for reliability in the presence of such failures. Once scheduled to a node, Pods don’t move and must be explicitly destroyed and rescheduled.

Multiple instances of a Pod can be deployed by repeating the workflow described here. However, ReplicaSets (Chapter 8) are better suited for running multiple instances of a Pod. (It turns out they’re also better at running a single Pod, but we’ll get into that later.)

## Creating a Pod

The simplest way to create a Pod is via the imperative `kubectl run` command. For example, to run our same `kuard` server, use:

```
$ kubectl run kuard --generator=run-pod/v1 \
--image=gcr.io/kuar-demo/kuard-amd64:blue
```

You can see the status of this Pod by running:

```
$ kubectl get pods
```

You may initially see the container as Pending, but eventually you will see it transition to Running, which means that the Pod and its containers have been successfully created.

For now, you can delete this Pod by running:

```
$ kubectl delete pods/kuard
```

We will now move on to writing a complete Pod manifest by hand.

## Creating a Pod Manifest

You can write a Pod manifests using YAML or JSON, but YAML is generally preferred because it is slightly more human-editable and has the ability to add comments. Pod manifests (and other Kubernetes API objects) should really be treated in the same way as source code, and things like comments help explain the Pod to new team members.

Pod manifests include a couple of key fields and attributes: namely a `metadata` section for describing the Pod and its labels, a `spec` section for describing volumes, and a list of containers that will run in the Pod.

In [Chapter 1](#) we deployed `kuard` using the following Docker command:

```
$ docker run -d --name kuard \
--publish 8080:8080 \
gcr.io/kuar-demo/kuard-amd64:blue
```

You can achieve a similar result by instead writing [Example 4-1](#) to a file named `kuard-pod.yaml` and then using `kubectl` commands to load that manifest to Kubernetes.

### *Example 4-1. kuard-pod.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
spec:
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      ports:
        - containerPort: 8080
          name: http
          protocol: TCP
```

Though it may initially seem more cumbersome to manage your application in this manner. This written record of desired state is the best practice in the long run, especially for large teams with many applications.

## Running Pods

In the previous section we created a Pod manifest that can be used to start a Pod running kuard. Use the `kubectl apply` command to launch a single instance of kuard:

```
$ kubectl apply -f kuard-pod.yaml
```

The Pod manifest will be submitted to the Kubernetes API server. The Kubernetes system will then schedule that Pod to run on a healthy node in the cluster, where the `kubelet` daemon will monitor it. Don't worry if you don't understand all the moving parts of Kubernetes right now; we'll get into more details throughout the book.

## Listing Pods

Now that we have a Pod running, let's go find out some more about it. Using the `kubectl` command-line tool, we can list all Pods running in the cluster. For now, this should only be the single Pod that we created in the previous step:

```
$ kubectl get pods
NAME      READY     STATUS    RESTARTS   AGE
kuard    1/1      Running   0          44s
```

You can see the name of the Pod (`kuard`) that we gave it in the previous YAML file. In addition to the number of ready containers (1/1), the output also shows the status, the number of times the Pod was restarted, and the age of the Pod.

If you ran this command immediately after the Pod was created, you might see:

```
NAME      READY     STATUS    RESTARTS   AGE
kuard    0/1      Pending   0          1s
```

The Pending state indicates that the Pod has been submitted but hasn't been scheduled yet.

If a more significant error occurs, such as an attempt to create a Pod with a container image that doesn't exist, it will also be listed in the status field.

### NOTE

By default, the `kubectl` command-line tool is concise in the information it reports, but you can get more information via command-line flags. Adding `-o wide` to any `kubectl` command will print out slightly more information (while still keeping the information to a single line). Adding `-o json` or `-o yaml` will print out the complete objects in JSON or YAML, respectively. If you ever want to see an exhaustive verbose logging of what `kubectl` is doing you can add the `--v=10` flag for comprehensive logging at the expense of readability.

## Pod Details

Sometimes, the single-line view is insufficient because it is too terse. Additionally, Kubernetes maintains numerous events about Pods that are present in the event stream, not attached to the Pod object.

To find out more information about a Pod (or any Kubernetes object) you can use the `kubectl describe` command. For example, to describe the Pod we previously created, you can run:

```
$ kubectl describe pods kuard
```

This outputs a bunch of information about the Pod in different sections. At the top is basic information about the Pod:

```
Name:          kuard
Namespace:     default
Node:          node1/10.0.15.185
Start Time:    Sun, 02 Jul 2017 15:00:38 -0700
Labels:        <none>
Annotations:   <none>
Status:        Running
IP:            192.168.199.238
Controllers:   <none>
```

Then there is information about the containers running in the Pod:

```
Containers:
  kuard:
    Container ID:  docker://055095...
    Image:         gcr.io/kuar-demo/kuard-amd64:blue
    Image ID:      docker-pullable://gcr.io/kuar-demo/kuard-
                    amd64@sha256:a580...
    Port:          8080/TCP
    State:         Running
      Started:    Sun, 02 Jul 2017 15:00:41 -0700
    Ready:         True
    Restart Count: 0
    Environment:   <none>
    Mounts:
      /var/run/secrets/kubernetes.io/serviceaccount from default-
        token-cg5f5 (ro)
```

Finally, there are events related to the Pod, such as when it was scheduled, when its image was pulled, and if/when it had to be restarted because of failing health checks:

Events:			Type	Reason
Seen From	SubObjectPath			
Message				
-----	-----	-----	-----	-----
50s default-scheduler			Normal	
Scheduled Success...				
49s kubelet, node1	spec.containers{kuard}	Normal		
Pulling pulling...				
47s kubelet, node1	spec.containers{kuard}	Normal		Pulled
Success...				
47s kubelet, node1	spec.containers{kuard}	Normal		
Created Created...				
47s kubelet, node1	spec.containers{kuard}	Normal		
Started Started...				

## Deleting a Pod

When it is time to delete a Pod, you can delete it either by name:

```
$ kubectl delete pods/kuard
```

Or you can use the same file that you used to create it:

```
$ kubectl delete -f kuard-pod.yaml
```

When a Pod is deleted, it is *not* immediately killed. Instead, if you run `kubectl get pods`, you will see that the Pod is in the Terminating state. All Pods have a termination *grace period*. By default, this is 30 seconds. When a Pod is transitioned to Terminating it no longer receives new requests. In a serving scenario, the grace period is important for reliability because it allows the Pod to finish any active requests that it may be in the middle of processing before it is terminated.

### WARNING

When you delete a Pod, any data stored in the containers associated with that Pod will be deleted as well. If you want to persist data across multiple instances of a Pod, you need to use PersistentVolumes, described at the end of this chapter.

# Accessing Your Pod

Now that your Pod is running, you’re going to want to access it for a variety of reasons. You may want to load the web service that is running in the Pod. You may want to view its logs to debug a problem that you are seeing, or even execute other commands inside the Pod to help debug. The following sections detail various ways you can interact with the code and data running inside your Pod.

## Using Port Forwarding

In Chapter Seven, we’ll show you how to expose a service to the world or other containers using load balancers—but often you simply want to access a specific Pod, even if it’s not serving traffic on the internet.

To achieve this, you can use the port-forwarding support built into the Kubernetes API and command-line tools.

When you run:

```
$ kubectl port-forward kuard 8080:8080
```

a secure tunnel is created from your local machine, through the Kubernetes master, to the instance of the Pod running on one of the worker nodes.

As long as the `port-forward` command is still running, you can access the Pod (in this case the `kuard` web interface) at <http://localhost:8080>.

## Getting More Info with Logs

When your application needs debugging, it’s helpful to be able to dig deeper than `describe` to understand what the application is doing.

Kubernetes provides two commands for debugging running containers. The `kubectl logs` command downloads the current logs from the running instance:

```
$ kubectl logs kuard
```

Adding the `-f` flag will cause you to continuously stream logs.

The `kubectl logs` command always tries to get logs from the currently running container. Adding the `--previous` flag will get logs from a previous instance of the container. This is useful, for example, if your containers are continuously restarting due to a problem at container startup.

### NOTE

While using `kubectl logs` is useful for occasional debugging of containers in production environments, it's generally useful to use a log aggregation service. There are several open source log aggregation tools, like fluentd and elasticsearch, as well as numerous cloud logging providers. These log aggregation services provide greater capacity for storing a longer duration of logs, as well as rich log searching and filtering capabilities. Many also provide the ability to aggregate logs from multiple Pods into a single view.

## Running Commands in Your Container with `exec`

Sometimes logs are insufficient, and to truly determine what's going on you need to execute commands in the context of the container itself. To do this you can use:

```
$ kubectl exec kuard date
```

You can also get an interactive session by adding the `-it` flags:

```
$ kubectl exec -it kuard ash
```

## Copying Files to and from Containers

At times you may need to copy files from a remote container to a local machine for more in-depth exploration. For example, you can use a tool like Wireshark to visualize `tcpdump` packet captures. Suppose you had a file called `/captures/capture3.txt` inside a container in your Pod. You could securely copy that file to your local machine by running:

```
$ kubectl cp <pod-name>:/captures/capture3.txt ./capture3.txt
```

Other times you may need to copy files from your local machine into a container. Let's say you want to copy `$HOME/config.txt` to a remote container. In this case, you can run:

```
$ kubectl cp $HOME/config.txt <pod-name>:/config.txt
```

Generally speaking, copying files into a container is an anti-pattern. You really should treat the contents of a container as immutable. But occasionally it's the most immediate way to stop the bleeding and restore your service to health, since it is quicker than building, pushing, and rolling out a new image. Once you stop the bleeding however, it is critically important that you immediately go and do the image build and rollout, or you are guaranteed to forget the local change that you made to your container and overwrite it in the subsequent regularly scheduled rollout.

## Health Checks

When you run your application as a container in Kubernetes, it is automatically kept alive for you using a *process health check*. This health check simply ensures that the main process of your application is always running. If it isn't, Kubernetes restarts it.

However, in most cases, a simple process check is insufficient. For example, if your process has deadlocked and is unable to serve requests, a process health check will still believe that your application is healthy since its process is still running.

To address this, Kubernetes introduced health checks for application *liveness*. Liveness health checks run application-specific logic, like loading a web page, to verify that the application is not just still running, but is functioning properly. Since these liveness health checks are application-specific, you have to define them in your Pod manifest.

## Liveness Probe

Once the kuard process is up and running, we need a way to confirm that it is actually healthy and shouldn't be restarted. Liveness probes are defined per container, which means each container inside a Pod is health-checked separately. In [Example 4-2](#), we add a liveness probe to our kuard container, which runs an HTTP request against the /healthy path on our container.

*Example 4-2. kuard-pod-health.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
spec:
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      livenessProbe:
        httpGet:
          path: /healthy
          port: 8080
        initialDelaySeconds: 5
        timeoutSeconds: 1
        periodSeconds: 10
        failureThreshold: 3
      ports:
        - containerPort: 8080
          name: http
          protocol: TCP
```

The preceding Pod manifest uses an `httpGet` probe to perform an HTTP GET request against the `/healthy` endpoint on port 8080 of the kuard container. The probe sets an `initialDelaySeconds` of 5, and thus will not be called until 5 seconds after all the containers in the Pod are created. The probe must respond within the 1-second timeout, and the HTTP status code must be equal to or greater than 200 and less than 400 to be considered successful. Kubernetes will call the probe every 10 seconds. If more than three consecutive probes fail, the container will fail and restart.

You can see this in action by looking at the kuard status page. Create a Pod using this manifest and then port-forward to that Pod:

```
$ kubectl apply -f kuard-pod-health.yaml
$ kubectl port-forward kuard 8080:8080
```

Point your browser to <http://localhost:8080>. Click the “Liveness Probe” tab. You should see a table that lists all of the probes that this instance of kuard has received. If you click the “Fail” link on that page, kuard will start to fail health checks. Wait long enough and Kubernetes will restart the container. At that point the display will reset and start over again. Details of the restart can be found with `kubectl describe pods kuard`. The “Events” section will have text similar to the following:

```
Killing container with id docker://2ac946...:pod
"kuard_default(9ee84...)"
container "kuard" is unhealthy, it will be killed and re-created.
```

### NOTE

While the default response to a failed liveness check is to restart the Pod, the actual behavior is governed by the Pod’s `restartPolicy`. There are three options for the restart policy: `Always` (the default), `OnFailure` (restart only on liveness failure or nonzero process exit code), or `Never`.

## Readiness Probe

Of course, liveness isn’t the only kind of health check we want to perform. Kubernetes makes a distinction between *liveness* and *readiness*. Liveness determines if an application is running properly. Containers that fail liveness checks are restarted. Readiness describes when a container is ready to serve user requests. Containers that fail readiness checks are removed from service load balancers. Readiness probes are configured similarly to liveness probes. We explore Kubernetes services in detail in [Chapter 6](#).

Combining the readiness and liveness probes helps ensure only healthy containers are running within the cluster.

## Types of Health Checks

In addition to HTTP checks, Kubernetes also supports `tcpSocket` health checks that open a TCP socket; if the connection succeeds, the probe succeeds. This style of probe is useful for non-HTTP applications; for example, databases or other non-HTTP-based APIs.

Finally, Kubernetes allows `exec` probes. These execute a script or program in the context of the container. Following typical convention, if this script returns a zero exit code, the probe succeeds; otherwise, it fails. `exec` scripts are often useful for custom application validation logic that doesn't fit neatly into an HTTP call.

## Resource Management

Most people move into containers and orchestrators like Kubernetes because of the radical improvements in image packaging and reliable deployment they provide. In addition to application-oriented primitives that simplify distributed system development, equally important is they allow you to increase the overall utilization of the compute nodes that make up the cluster. The basic cost of operating a machine, either virtual or physical, is basically constant regardless of whether it is idle or fully loaded.

Consequently, ensuring that these machines are maximally active increases the efficiency of every dollar spent on infrastructure.

Generally speaking, we measure this efficiency with the utilization metric. *Utilization* is defined as the amount of a resource actively being used divided by the amount of a resource that has been purchased. For example, if you purchase a one-core machine, and your application uses one-tenth of a core, then your utilization is 10%. With scheduling systems like Kubernetes managing resource packing, you can drive your utilization to greater than 50%. To achieve this, you have to tell Kubernetes about the

resources your application requires, so that Kubernetes can find the optimal packing of containers onto purchased machines.

Kubernetes allows users to specify two different resource metrics. Resource *requests* specify the minimum amount of a resource required to run the application. Resource *limits* specify the maximum amount of a resource that an application can consume. Let's look at these in greater detail in the following [<span class="keep-together">sections</span>].

## Resource Requests: Minimum Required Resources

When a Pod requests the resources required to run its containers.

Kubernetes guarantees that these resources are available to the Pod. The most commonly requested resources are CPU and memory, but Kubernetes supports other resource types as well, such as GPUs.

For example, to request that the `kuard` container lands on a machine with half a CPU free and gets 128 MB of memory allocated to it, we define the Pod as shown in [Example 4-3](#).

*Example 4-3. kuard-pod-resreq.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
spec:
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      resources:
        requests:
          cpu: "500m"
          memory: "128Mi"
      ports:
        - containerPort: 8080
          name: http
          protocol: TCP
```

## NOTE

Resources are requested per container, not per Pod. The total resources requested by the Pod is the sum of all resources requested by all containers in the Pod because the different containers often have very different CPU requirements. For example, if a Pod contains a web server and data synchronizer, the web server is user-facing and likely needs a great deal of CPU, while the data synchronizer can make do with very little.

## Request limit details

Requests are used when scheduling Pods to nodes. The Kubernetes scheduler will ensure that the sum of all requests of all Pods on a node does not exceed the capacity of the node. Therefore, a Pod is guaranteed to have at least the requested resources when running on the node. Importantly, “request” specifies a minimum. It does not specify a maximum cap on the resources a Pod may use. To explore what this means, let’s look at an example.

Imagine a container whose code attempts to use all available CPU cores. Suppose that we create a Pod with this container that requests 0.5 CPU. Kubernetes schedules this Pod onto a machine with a total of 2 CPU cores.

As long as it is the only Pod on the machine, it will consume all 2.0 of the available cores, despite only requesting 0.5 CPU.

If a second Pod with the same container and the same request of 0.5 CPU lands on the machine, then each Pod will receive 1.0 cores.

If a third identical Pod is scheduled, each Pod will receive 0.66 cores. Finally, if a fourth identical Pod is scheduled, each Pod will receive the 0.5 core it requested, and the node will be at capacity.

CPU requests are implemented using the `cpu-shares` functionality in the Linux kernel.

## NOTE

Memory requests are handled similarly to CPU, but there is an important difference. If a container is over its memory request, the OS can't just remove memory from the process, because it's been allocated. Consequently, when the system runs out of memory, the kubelet terminates containers whose memory usage is greater than their requested memory. These containers are automatically restarted, but with less available memory on the machine for the container to consume.

Since resource requests guarantee resource availability to a Pod, they are critical to ensuring that containers have sufficient resources in high-load situations.

## Capping Resource Usage with Limits

In addition to setting the resources required by a Pod, which establishes the minimum resources available to it, you can also set a maximum on a it's resource usage via resource *limits*.

In our previous example we created a kuard Pod that requested a minimum of 0.5 of a core and 128 MB of memory. In the Pod manifest in [Example 4-4](#), we extend this configuration to add a limit of 1.0 CPU and 256 MB of memory.

---

### *Example 4-4. kuard-pod-reslim.yaml*

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
spec:
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      resources:
        requests:
          cpu: "500m"
          memory: "128Mi"
        limits:
          cpu: "1000m"
          memory: "256Mi"
  ports:
```

```
- containerPort: 8080
  name: http
  protocol: TCP
```

When you establish limits on a container, the kernel is configured to ensure that consumption cannot exceed these limits. A container with a CPU limit of 0.5 cores will only ever get 0.5 cores, even if the CPU is otherwise idle. A container with a memory limit of 256 MB will not be allowed additional memory, for example `malloc` will fail, if its memory usage exceeds 256 MB.

## Persisting Data with Volumes

When a Pod is deleted or a container restarts, any and all data in the container's filesystem is also deleted. This is often a good thing, since you don't want to leave around cruft that happened to be written by your stateless web application. In other cases, having access to persistent disk storage is an important part of a healthy application. Kubernetes models such persistent storage.

## Using Volumes with Pods

To add a volume to a Pod manifest, there are two new stanzas to add to our configuration. The first is a new `spec.volumes` section. This array defines all of the volumes that may be accessed by containers in the Pod manifest. It's important to note that not all containers are required to mount all volumes defined in the Pod. The second addition is the `volumeMounts` array in the container definition. This array defines the volumes that are mounted into a particular container, and the path where each volume should be mounted. Note that two different containers in a Pod can mount the same volume at different mount paths.

*Example 4-5. kuard-pod-vol.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
```

```

spec:
volumes:
  - name: "kuard-data"
    hostPath:
      path: "/var/lib/kuard"
containers:
  - image: gcr.io/kuar-demo/kuard-amd64:blue
    name: kuard
    volumeMounts:
      - mountPath: "/data"
        name: "kuard-data"
ports:
  - containerPort: 8080
    name: http
    protocol: TCP

```

The manifest in [Example 4-5](#) defines a single new volume named `kuard-data`, which the `kuard` container mounts to the `/data` path.

## Different Ways of Using Volumes with Pods

There are a variety of ways you can use data in your application. The following are a few, and the recommended patterns for Kubernetes.

### *Communication/synchronization*

In the first example of a Pod, we saw how two containers used a shared volume to serve a site while keeping it synchronized to a remote Git location. To achieve this, the Pod uses an `emptyDir` volume. Such a volume is scoped to the Pod's lifespan, but it can be shared between two containers, forming the basis for communication between our Git sync and web serving containers.

### *Cache*

An application may use a volume that is valuable for performance, but not required for correct operation of the application. For example, perhaps the application keeps prerendered thumbnails of larger images. Of course, they can be reconstructed from the original images, but that makes serving the thumbnails more expensive. You want such a cache

to survive a container restart due to a health-check failure, and thus `emptyDir` works well for the cache use case as well.

### *Persistent data*

Sometimes you will use a volume for truly persistent data—data that is independent of the lifespan of a particular Pod, and should move between nodes in the cluster if a node fails or a Pod moves to a different machine for some reason. To achieve this, Kubernetes supports a wide variety of remote network storage volumes, including widely supported protocols like NFS and iSCSI as well as cloud provider network storage like Amazon’s Elastic Block Store, Azure’s Files and Disk Storage, as well as Google’s Persistent Disk.

### *Mounting the host filesystem*

Other applications don’t actually need a persistent volume, but they do need some access to the underlying host filesystem. For example, they may need access to the `/dev` filesystem in order to perform raw block-level access to a device on the system. For these cases, Kubernetes supports the `hostPath` volume, which can mount arbitrary locations on the worker node into the container.

The previous example ([Example 4-5](#)) uses the `hostPath` volume type. The volume created is `/var/lib/kuard` on the host.

### *Persisting Data Using Remote Disks*

Often, you want the data a Pod is using to stay with the Pod, even if it is restarted on a different host machine. To achieve this, you can mount a remote network storage volume into your Pod. When using network-based storage, Kubernetes automatically mounts and unmounts the appropriate storage whenever a Pod using that volume is scheduled onto a particular machine.

There are numerous methods for mounting volumes over the network. Kubernetes includes support for standard protocols such as NFS and iSCSI as well as cloud provider-based storage APIs for the major cloud providers (both public and private). In many cases, the cloud providers will also create the disk for you if it doesn't already exist.

Here is an example of using an NFS server:

```
...
# Rest of pod definition above here
volumes:
- name: "kuard-data"
  nfs:
    server: my.nfs.server.local
    path: "/exports"
```

Persistent volumes are a deep topic. There is a more in-depth examination of the subject in [Chapter 12](#).

## Putting It All Together

Many applications are stateful, and as such we must preserve any data and ensure access to the underlying storage volume regardless of what machine the application runs on. As we saw earlier, this can be achieved using a persistent volume backed by network-attached storage. We also want to ensure that a healthy instance of the application is running at all times, which means we want to make sure the container running kuard is ready before we expose it to clients.

Through a combination of persistent volumes, readiness and liveness probes, and resource restrictions, Kubernetes provides everything needed to run stateful applications reliably. [Example 4-6](#) pulls this all together into one manifest.

---

### *Example 4-6. kuard-pod-full.yaml*

```
apiVersion: v1
kind: Pod
metadata:
```

```

name: kuard
spec:
  volumes:
    - name: "kuard-data"
      nfs:
        server: my.nfs.server.local
        path: "/exports"
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      ports:
        - containerPort: 8080
          name: http
          protocol: TCP
      resources:
        requests:
          cpu: "500m"
          memory: "128Mi"
        limits:
          cpu: "1000m"
          memory: "256Mi"
      volumeMounts:
        - mountPath: "/data"
          name: "kuard-data"
    livenessProbe:
      httpGet:
        path: /healthy
        port: 8080
      initialDelaySeconds: 5
      timeoutSeconds: 1
      periodSeconds: 10
      failureThreshold: 3
    readinessProbe:
      httpGet:
        path: /ready
        port: 8080
      initialDelaySeconds: 30
      timeoutSeconds: 1
      periodSeconds: 10
      failureThreshold: 3

```

You can see how the definition of the Pod has grown over the chapter. Each new capability added to your application also adds a new section to its definition.

## Summary

Pods represent the atomic unit of work in a Kubernetes cluster. They are comprised of one or more containers working together symbiotically. To create one, you write a Pod manifest and submit it to the Kubernetes API server by using the command-line tool or (less frequently) by making HTTP and JSON calls to the server directly.

Once you've submitted the manifest to the API server, the Kubernetes scheduler finds a machine where the Pod can fit and schedules the Pod to that machine. Once scheduled, the `kubelet` daemon on that machine is responsible for creating the containers that correspond to the Pod, as well as performing any health checks defined in the Pod manifest.

Once a Pod is scheduled to a node, no rescheduling occurs if that node fails. Additionally, to create multiple replicas of the same Pod you have to create and name them manually. In a Chapter Nine we introduce the ReplicaSet object and show how you can automate the creation of multiple identical Pods and ensure that they are recreated in the event of a node machine failure.

# Chapter 5. Labels and Annotations

---

## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the author’s raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 6th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgray@oreilly.com](mailto:sgray@oreilly.com).

Kubernetes was made to grow with you as your application scales in both size and complexity. Labels and annotations are fundamental concepts in Kubernetes that let you work in sets of things that map to how *you* think about your application. You can organize, mark, and cross-index all of your resources to represent the groups that make the most sense for your application.

*Labels* are key/value pairs that can be attached to Kubernetes objects such as Pods and ReplicaSets. They can be arbitrary, and are useful for attaching identifying information to Kubernetes objects. Labels provide the foundation for grouping objects.

*Annotations*, on the other hand, provide a storage mechanism that resembles labels: key/value pairs designed to hold nonidentifying information that tools and libraries can leverage.

# Labels

Labels provide identifying metadata for objects. These are fundamental qualities of the object that will be used for grouping, viewing, and operating.

## NOTE

The motivations for labels grew out of Google's experience in running large and complex applications. A couple of lessons that emerged from this experience.

The first lesson is that production abhors a singleton. When deploying software, users often start with a single instance. However, as the application matures, these singletons often multiply and become sets of objects. With this in mind, Kubernetes uses labels to deal with sets of objects instead of single instances.

The second lesson is that any hierarchy imposed by the system will fall short for many users. In addition, user groupings and hierarchies change over time. For instance, a user may start out with the idea that all apps are made up of many services. However, over time, a service may be shared across multiple apps. Kubernetes labels are flexible enough to adapt to these situations and more.

See the great site reliability book *Site Reliability Engineering* by Betsy Beyer et al. (O'Reilly) for some deeper background on how Google approaches production systems.

Labels have simple syntax. They are key/value pairs, where both the key and value are represented by strings. Label keys can be broken down into two parts: an optional prefix and a name, separated by a slash. The prefix, if specified, must be a DNS subdomain with a 253-character limit. The key name is required and must be shorter than 63 characters. Names must also start and end with an alphanumeric character and permit the use of dashes (-), underscores (\_), and dots (.) between characters.

Label values are strings with a maximum length of 63 characters. The contents of the label values follow the same rules as for label keys.

Table 5-1 shows some valid label keys and values.

*T*  
*a*  
*b*  
*l*  
*e*

*5*  
-  
*I*  
. *L*  
*a*  
*b*  
*e*  
*l*  
*e*  
*x*  
*a*  
*m*  
*p*  
*l*  
*e*  
*s*

<b>Key</b>	<b>Value</b>
acme.com/app-version	1.0.0
appVersion	1.0.0
app.version	1.0.0
kubernetes.io/cluster-service	true

When domain names are used in labels and annotations they are expected to be aligned to that particular entity in some way. For example, a project might define a canonical set of labels used to identify the various stages of application deployment such as staging, canary and production. Or a cloud provider might define provider-specific annotations that extend Kubernetes objects to activate features specific to their service.

## Applying Labels

Here we create a few deployments (a way to create an array of Pods) with some interesting labels. We'll take two apps (called `alpaca` and `bandicoot`) and have two environments and two versions for each:

First, create the `alpaca-prod` deployment and set the `ver`, `app`, and `env` labels:

+

```
$ kubectl run alpaca-prod \
--image=gcr.io/kuar-demo/kuard-amd64:blue \
--replicas=2 \
--labels="ver=1,app=alpaca,env=prod"
```

Next, create the `alpaca-test` deployment and set the `ver`, `app`, and `env` labels with the appropriate values:

+

```
$ kubectl run alpaca-test \
--image=gcr.io/kuar-demo/kuard-amd64:green \
--replicas=1 \
--labels="ver=2,app=alpaca,env=test"
```

Finally, create two deployments for `bandicoot`. Here we name the environments `prod` and `staging`:

+

```
$ kubectl run bandicoot-prod \
--image=gcr.io/kuar-demo/kuard-amd64:green \
--replicas=2 \
--labels="ver=2,app=bandicoot,env=prod"
$ kubectl run bandicoot-staging \
--image=gcr.io/kuar-demo/kuard-amd64:green \
--replicas=1 \
--labels="ver=2,app=bandicoot,env=staging"
```

At this point you should have four deployments—alpaca-prod, alpaca-test, bandicoot-prod, and bandicoot-staging:

```
$ kubectl get deployments --show-labels
```

NAME	LABELS
alpaca-prod	... app=alpaca,env=prod,ver=1
alpaca-test	... app=alpaca,env=test,ver=2
bandicoot-prod	... app=bandicoot,env=prod,ver=2
bandicoot-staging	... app=bandicoot,env=staging,ver=2

We can visualize this as a Venn diagram based on the labels ([Figure 5-1](#)).

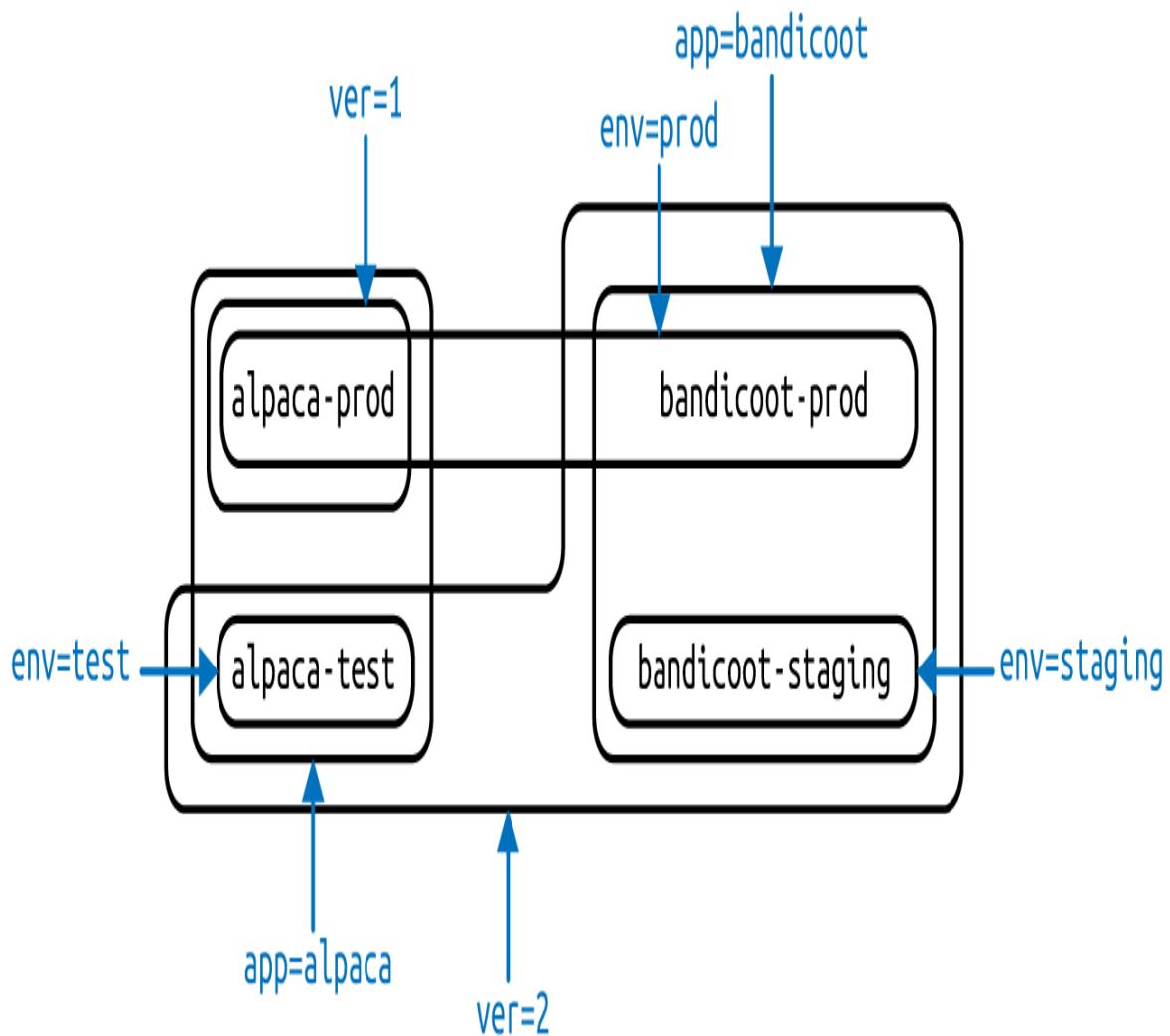


Figure 5-1. Visualization of labels applied to our deployments

## Modifying Labels

You can also apply or update labels on objects after you create them created:

```
$ kubectl label deployments alpaca-test "canary=true"
```

## WARNING

There is a caveat here. In this example, the `kubectl label` command will only change the label on the deployment itself; it won't affect any objects that the deployment creates, such as ReplicaSets and Pods. To change those, you'll need to change the template embedded in the deployment (see [Chapter 9](#)).

You can also use the `-L` option to `kubectl get` to show a label value as a column:

```
$ kubectl get deployments -L canary
```

NAME	DESIRED	CURRENT	... CANARY
alpaca-prod	2	2	... <none>
alpaca-test	1	1	... true
bandicoot-prod	2	2	... <none>
bandicoot-staging	1	1	... <none>

You can remove a label by applying a dash-suffix:

```
$ kubectl label deployments alpaca-test "canary-"
```

## Label Selectors

Label selectors are used to filter Kubernetes objects based on a set of labels. Selectors use a simple syntax for Boolean expressions. They are used both by end users (via tools like `kubectl`) and by different types of objects (such as how a ReplicaSet relates to its Pods).

Each deployment (via a ReplicaSet) creates a set of Pods using the labels specified in the template embedded in the deployment. This is configured by the `kubectl run` command.

Running the `kubectl get pods` command should return all the Pods currently running in the cluster. We should have a total of six `kuard` Pods across our three environments:

```
$ kubectl get pods --show-labels
```

NAME	... LABELS
alpaca-prod-3408831585-4nzfb	...
app=alpaca,env=prod,ver=1,...	
alpaca-prod-3408831585-kga0a	...
app=alpaca,env=prod,ver=1,...	
alpaca-test-1004512375-3r1m5	...
app=alpaca,env=test,ver=2,...	
bandicoot-prod-373860099-0t1gp	...
app=bandicoot,env=prod,ver=2,...	
bandicoot-prod-373860099-k2wcf	...
app=bandicoot,env=prod,ver=2,...	
bandicoot-staging-1839769971-3ndv	...
app=bandicoot,env=staging,ver=2,...	

### NOTE

You may see a new label that you haven't seen before: `pod-template-hash`. This label is applied by the deployment so it can keep track of which Pods were generated from which template versions. This allows the deployment to manage updates in a cleanly, as will be covered in depth in [Chapter 9](#).

If we only want to list Pods that have the `ver` label set to 2, we could use the `--selector` flag:

```
$ kubectl get pods --selector="ver=2"
```

NAME	READY	STATUS	RESTARTS
AGE			
alpaca-test-1004512375-3r1m5 3m	1/1	Running	0
bandicoot-prod-373860099-0t1gp 3m	1/1	Running	0
bandicoot-prod-373860099-k2wcf 3m	1/1	Running	0
bandicoot-staging-1839769971-3ndv5 3m	1/1	Running	0

If we specify two selectors separated by a comma, only the objects that satisfy both will be returned. This is a logical AND operation:

```
$ kubectl get pods --selector="app=bandicoot,ver=2"

NAME                                READY   STATUS    RESTARTS
AGE
bandicoot-prod-373860099-0t1gp      1/1    Running   0
4m
bandicoot-prod-373860099-k2wcf      1/1    Running   0
4m
bandicoot-staging-1839769971-3ndv5  1/1    Running   0
4m
```

We can also ask if a label is one of a set of values. Here we ask for all Pods where the app label is set to alpaca or bandicoot (which will be all six Pods):

```
$ kubectl get pods --selector="app in (alpaca,bandicoot)"

NAME                                READY   STATUS    RESTARTS
AGE
alpaca-prod-3408831585-4nzfb       1/1    Running   0
6m
alpaca-prod-3408831585-kga0a       1/1    Running   0
6m
alpaca-test-1004512375-3r1m5      1/1    Running   0
6m
bandicoot-prod-373860099-0t1gp     1/1    Running   0
6m
bandicoot-prod-373860099-k2wcf     1/1    Running   0
6m
bandicoot-staging-1839769971-3ndv5 1/1    Running   0
6m
```

Finally, we can ask if a label is set at all. Here we are asking for all of the deployments with the canary label set to anything:

```
$ kubectl get deployments --selector="canary"

NAME        DESIRED   CURRENT   UP-TO-DATE   AVAILABLE   AGE
alpaca-test  1          1          1            1           7m
```

There are also “negative” versions of each of these, as shown in [Table 5-2](#).

*T*  
*a*  
*b*  
*l*  
*e*

*5*  
-  
*2*  
. *S*  
*e*  
*l*  
*e*  
*c*  
*t*  
*o*  
*r*

*o*  
*p*  
*e*  
*r*  
*a*  
*t*  
*o*  
*r*  
*s*

---

<b>Operator</b>	<b>Description</b>
-----------------	--------------------

---

key=value	key is set to value
-----------	---------------------

key!=value	key is not set to value
key in (value1, value2)	key is one of value1 or value2
key notin (value1, value2)	key is not one of value1 or value2
key	key is set
!key	key is not set

For example, asking if a key, in this case `canary`, is not set can look like:

```
$ kubectl get deployments --selector='!canary'
```

You can combine positive and negative selectors:

```
$ kubectl get pods -l 'ver=2,!canary'
```

## Label Selectors in API Objects

A Kubernetes object uses a label selector to refer to a set of other Kubernetes objects. Instead of a simple string as described in the previous section, we use a parsed structure.

For historical reasons (Kubernetes doesn't break API compatibility!), there are two forms. Most objects support a newer, more powerful set of selector operators.

A selector of `app=alpaca,ver in (1, 2)` would be converted to this:

```
selector:
  matchLabels:
    app: alpaca
  matchExpressions:
    - {key: ver, operator: In, values: [1, 2]}
```

This example uses compact YAML syntax. This is an item in a list (`matchExpressions`) that is a map with three entries. The last entry (`values`) has a value that is a list with two items.

All of the terms are evaluated as a logical AND. The only way to represent the `!=` operator is to convert it to a `NotIn` expression with a single value.

The older form of specifying selectors (used in `ReplicationControllers` and services) only supports the `=` operator. The `=` operator selects target objects where its set of key/value pairs all match the object.

The selector `app=alpaca, ver=1` would be represented like this:

```
selector:  
  app: alpaca  
  ver: 1
```

## Labels in the Kubernetes Architecture

In addition to enabling users to organize their infrastructure, labels play a critical role in linking various related Kubernetes objects. Kubernetes is a purposefully decoupled system. There is no hierarchy and all components operate independently. However, in many cases objects need to relate to one another, and these relationships are defined by labels and label selectors.

For example, `ReplicaSets`, which create and maintain multiple replicas of a `Pod`, find the `Pods` that they are managing via a selector. Likewise, a service load balancer finds the `Pods` to which it should bring traffic via a selector query. When a `Pod` is created, it can use a node selector to identify a particular set of nodes onto which it can be scheduled. When people want to restrict network traffic in their cluster, they use `NetworkPolicy` in conjunction with specific labels to identify `Pods` that should or should not be allowed to communicate with each other.

Labels are a powerful and ubiquitous glue that holds a Kubernetes application together. Though your application will likely start out with a

simple set of labels and queries, you should expect it to grow in size and sophistication with time.

## Annotations

Annotations provide a place to store additional metadata for Kubernetes objects where the sole purpose of the metadata is assisting tools and libraries. They are a way for other programs driving Kubernetes via an API to store some opaque data with an object. Annotations can be used for the tool itself or to pass configuration information between external systems.

While labels are used to identify and group objects, annotations are used to provide extra information about where an object came from, how to use it, or policy around that object. There is overlap, and it is a matter of taste as to when to use an annotation or a label. When in doubt, add information to an object as an annotation and promote it to a label if you find yourself wanting to use it in a selector.

Annotations are used to:

- Keep track of a “reason” for the latest update to an object.
- Communicate a specialized scheduling policy to a specialized scheduler.
- Extend data about the last tool to update the resource and how it was updated (used for detecting changes by other tools and doing a smart merge).
- Attach build, release, or image information that isn’t appropriate for labels (may include a Git hash, timestamp, PR number, etc.).
- Enable the Deployment object ([Chapter 9](#)) to keep track of ReplicaSets that it is managing for rollouts.
- Provide extra data to enhance the visual quality or usability of a UI. For example, objects could include a link to an icon (or a base64-encoded version of an icon).

- Prototype alpha functionality in Kubernetes (instead of creating a first-class API field, the parameters for that functionality are encoded in an annotation).

Annotations are used in various places in Kubernetes, with the primary use case being rolling deployments. During rolling deployments, annotations are used to track rollout status and provide the necessary information required to roll back a deployment to a previous state.

Avoid using the Kubernetes API server as a general-purpose database. Annotations are good for small bits of data that are highly associated with a specific resource. If you want to store data in Kubernetes but you don't have an obvious object to associate it with, consider storing that data in some other, more appropriate database.

## Defining Annotations

Annotation keys use the same format as label keys. However, because they are often used to communicate information between tools, the “namespace” part of the key is more important. Example keys include `deployment.kubernetes.io/revision` or `kubernetes.io/change-cause`.

The value component of an annotation is a free-form string field. While this allows maximum flexibility as users can store arbitrary data, because this is arbitrary text, there is no validation of any format. For example, it is not uncommon for a JSON document to be encoded as a string and stored in an annotation. It is important to note that the Kubernetes server has no knowledge of the required format of annotation values. If annotations are used to pass or store data, there is no guarantee the data is valid. This can make tracking down errors more difficult.

Annotations are defined in the common `metadata` section in every Kubernetes object:

```
...  
metadata:
```

```
annotations:  
example.com/icon-url: "https://example.com/icon.png"  
...
```

## WARNING

Annotations are very convenient and provide powerful loose coupling. However, use them judiciously to avoid an untyped mess of data.

## Cleanup

It is easy to clean up all of the deployments that we started in this chapter:

```
$ kubectl delete deployments --all
```

If you want to be more selective, you can use the `--selector` flag to choose which deployments to delete.

## Summary

Labels are used to identify and optionally group objects in a Kubernetes cluster. They are also used in selector queries to provide flexible runtime grouping of objects, such as Pods.

Annotations provide object-scoped key/value metadata storage used by automation tooling and client libraries. They can also be used to hold configuration data for external tools such as third-party schedulers and monitoring tools.

Labels and annotations are vital to understanding how key components in a Kubernetes cluster work together to ensure the desired cluster state. Using them properly unlocks the true power of Kubernetes's flexibility and provides a starting point for building automation tools and deployment workflows.

# Chapter 7. HTTP Load Balancing with Ingress

---

## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the author’s raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 8th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

A critical part of any application is getting network traffic to and from that application. As described in [Chapter 6](#), Kubernetes has a set of capabilities to enable services to be exposed outside of the cluster. For many users and simple use cases these capabilities are sufficient.

But the Service object operates at Layer 4 (according to the OSI model<sup>1</sup>). This means that it only forwards TCP and UDP connections and doesn’t look inside of those connections. Because of this, hosting many applications on a cluster uses many different exposed services. In the case where these services are `type: NodePort`, you’ll have to have clients connect to a unique port per service. In the case where these services are `type: LoadBalancer`, you’ll be allocating (often expensive or scarce) cloud resources for each service. But for HTTP (Layer 7)-based services, we can do better.

When solving a similar problem in non-Kubernetes situations, users often turn to the idea of “virtual hosting.” This is a mechanism to host many HTTP sites on a single IP address. Typically, the user uses a load balancer or reverse proxy to accept incoming connections on HTTP (80) and HTTPS (443) ports. That program then parses the HTTP connection and, based on the `Host` header and the URL path that is requested, proxies the HTTP call to some other program. In this way, that load balancer or reverse proxy plays “traffic cop” for decoding and directing incoming connections to the right “upstream” server.

Kubernetes calls its HTTP-based load-balancing system *Ingress*. Ingress is a Kubernetes-native way to implement the “virtual hosting” pattern we just discussed. One of the more complex aspects of the pattern is that the user has to manage the load balancer configuration file. In a dynamic environment and as the set of virtual hosts expands, this can be very complex. The Kubernetes Ingress system works to simplify this by (a) standardizing that configuration, (b) moving it to a standard Kubernetes object, and (c) merging multiple Ingress objects into a single config for the load balancer.

The typical software base implementation looks something like what is depicted in [Figure 7-1](#). The Ingress controller is a software system exposed outside the cluster using a service of type: `LoadBalancer`. It then proxies requests to “upstream” servers. The configuration for how it does this is the result of reading and monitoring Ingress objects.

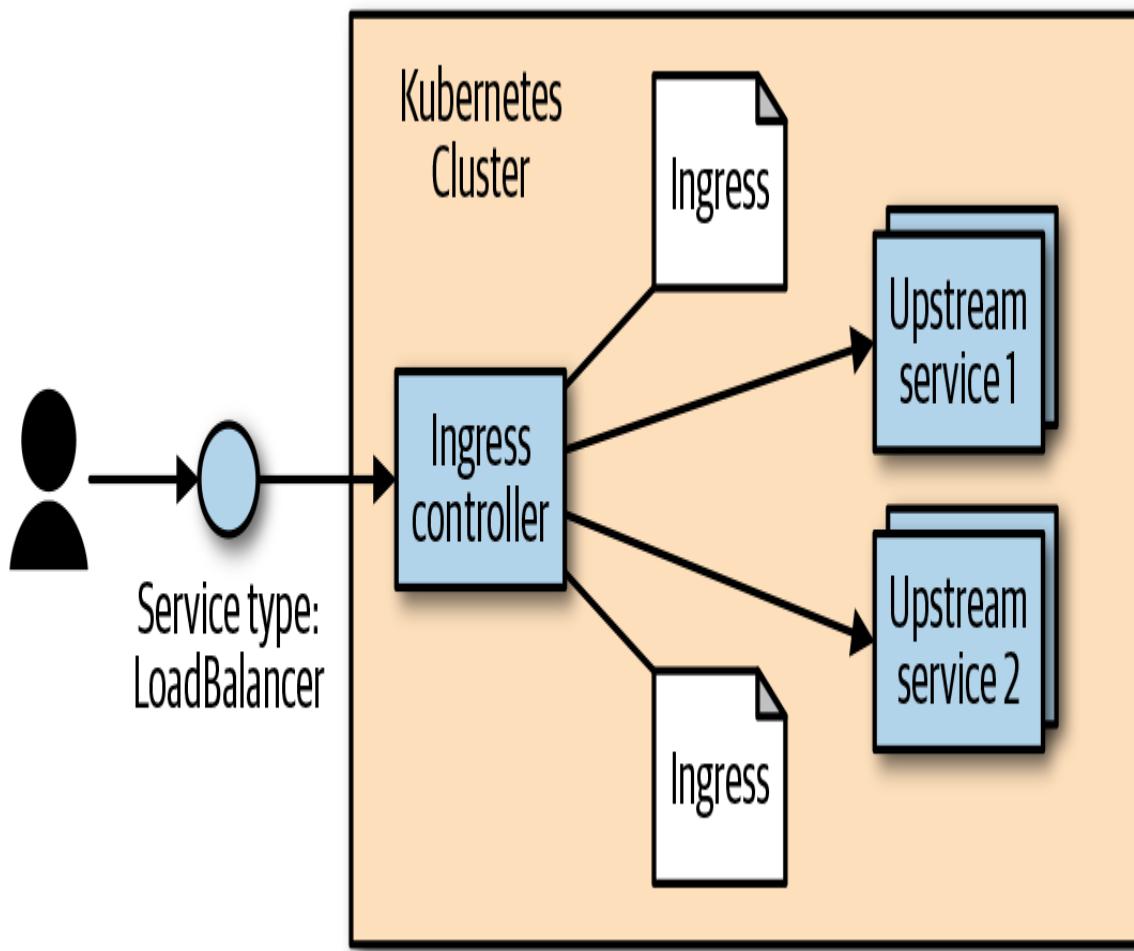


Figure 7-1. The typical software Ingress controller configuration

## Ingress Spec Versus Ingress Controllers

While conceptually simple, at an implementation level Ingress is very different from pretty much every other regular resource object in Kubernetes. Specifically, it is split into a common resource specification and a controller implementation. There is no “standard” Ingress controller that is built into Kubernetes, so the user must install one of many optional implementations.

Users can create and modify Ingress objects just like every other object. But, by default, there is no code running to actually act on those objects. It

is up to the users (or the distribution they are using) to install and manage an outside controller. In this way, the controller is pluggable.

There are multiple reasons that Ingress ended up like this. First of all, there is no one single HTTP load balancer that can universally be used. In addition to many software load balancers (both open source and proprietary), there are also load-balancing capabilities provided by cloud providers (e.g., ELB on AWS), and hardware-based load balancers. The second reason is that the Ingress object was added to Kubernetes before any of the common extensibility capabilities were added (see [Link to Come]). As Ingress progresses, it is likely that it will evolve to use these mechanisms.

## Installing Contour

While there are many available Ingress controllers, for the examples here we use an Ingress controller called Contour. This is a controller built to configure the open source (and CNCF project) load balancer called Envoy. Envoy is built to be dynamically configured via an API. The Contour Ingress controller takes care of translating the Ingress objects into something that Envoy can understand.

### NOTE

The Contour project is hosted at <https://github.com/projectcontour/contour>. It was created by Heptio, in collaboration with real-world customers and is used in production settings but is now an independent open source project.

You can install Contour with a simple one-line invocation:

```
$ kubectl apply -f  
https://projectcontour.io/quickstart/contour.yaml
```

Note that this requires execution by a user who has cluster-admin permissions.

This one line works for most configurations. It creates a namespace called `projectcontour`. Inside of that namespace it creates a deployment (with two replicas) and an external-facing service of type : `LoadBalancer`. In addition, it sets up the correct permissions via a service account and installs a CustomResourceDefinition (see [Link to Come]) for some extended capabilities discussed in “[The Future of Ingress](#)”.

Because it is a global install, you need to ensure that you have wide admin permissions on the cluster you are installing into.

After you install it, you can fetch the external address of Contour via:

```
$ kubectl get -n projectcontour service contour -o wide
NAME      CLUSTER-IP      EXTERNAL-IP          PORT(S)        ...
contour   10.106.53.14    a477...amazonaws.com  80:30274/TCP ...
```

Look at the `EXTERNAL-IP` column. This can be either an IP address (for GCP and Azure) or a hostname (for AWS). Other clouds and environments may differ. If your Kubernetes cluster doesn’t support services of type : `LoadBalancer`, you’ll have to change the YAML for installing Contour to simply use type : `NodePort` and route traffic to machines on the cluster via a mechanism that works in your configuration.

If you are using `minikube`, you probably won’t have anything listed for `EXTERNAL-IP`. To fix this, you need to open a separate terminal window and run `minikube tunnel`. This configures networking routes such that you have unique IP addresses assigned to every service of type : `LoadBalancer`.

## Configuring DNS

To make Ingress work well, you need to configure DNS entries to the external address for your load balancer. You can map multiple hostnames to a single external endpoint and the Ingress controller will play traffic cop and direct incoming requests to the appropriate upstream service based on that hostname.

For this chapter, we assume that you have a domain called `example.com`. You need to configure two DNS entries: `alpaca.example.com` and `bandicoot.example.com`. If you have an IP address for your external load balancer, you'll want to create A records. If you have a hostname, you'll want to configure CNAME records.

## Configuring a Local hosts File

If you don't have a domain or if you are using a local solution such as `minikube`, you can set up a local configuration by editing your `/etc/hosts` file to add an IP address. You need admin/root privileges on your workstation. The location of the file may differ on your platform, and making it take effect may require extra steps. For example, on Windows the file is usually at `C:\Windows\System32\drivers\etc\hosts`, and for recent versions of macOS you need to run `sudo killall -HUP mDNSResponder` after changing the file.

Edit the file to add a line like the following:

```
<ip-address> alpaca.example.com bandicoot.example.com
```

For `<ip-address>`, fill in the external IP address for Contour. If all you have is a hostname (like from AWS), you can get an IP address (that may change in the future) by executing `host -t a <address>`.

Don't forget to undo these changes when you are done!

## Using Ingress

Now that we have an Ingress controller configured, let's put it through its paces. First we'll create a few upstream (also sometimes referred to as "backend") services to play with by executing the following commands:

```
$ kubectl run be-default \
--image=gcr.io/kuar-demo/kuard-amd64:blue \
--replicas=3 \
```

```

--port=8080
$ kubectl expose deployment be-default
$ kubectl run alpaca \
  --image=gcr.io/kuar-demo/kuard-amd64:green \
  --replicas=3 \
  --port=8080
$ kubectl expose deployment alpaca
$ kubectl run bandicoot \
  --image=gcr.io/kuar-demo/kuard-amd64:purple \
  --replicas=3 \
  --port=8080
$ kubectl expose deployment bandicoot
$ kubectl get services -o wide

NAME           CLUSTER-IP      ... PORT(S)      ... SELECTOR
alpaca         10.115.245.13  ... 8080/TCP    ... run=alpaca
bandicoot      10.115.242.3   ... 8080/TCP    ... run=bandicoot
be-default     10.115.246.6   ... 8080/TCP    ... run=be-default
kubernetes     10.115.240.1   ... 443/TCP     ... <none>

```

## Simplest Usage

The simplest way to use Ingress is to have it just blindly pass everything that it sees through to an upstream service. There is limited support for imperative commands to work with Ingress in `kubectl`, so we'll start with a YAML file (see [Example 7-1](#)).

*Example 7-1. simple-ingress.yaml*

---

```

apiVersion: extensions/v1beta1
kind: Ingress
metadata:
  name: simple-ingress
spec:
  backend:
    serviceName: alpaca
    servicePort: 8080

```

Create this Ingress with `kubectl apply`:

```

$ kubectl apply -f simple-ingress.yaml
ingress.extensions/simple-ingress created

```

You can verify that it was set up correctly using `kubectl get` and `kubectl describe`:

```
$ kubectl get ingress
NAME          HOSTS   ADDRESS   PORTS   AGE
simple-ingress *           80        13m

$ kubectl describe ingress simple-ingress
Name:            simple-ingress
Namespace:       default
Address:
Default backend: be-default:8080
(172.17.0.6:8080,172.17.0.7:8080,172.17.0.8:8080)
Rules:
  Host    Path  Backends
  ----  ----  -----
  *      *      be-default:8080
(172.17.0.6:8080,172.17.0.7:8080,172.17.0.8:8080)
Annotations:
...
Events: <none>
```

This sets things up so that *any* HTTP request that hits the Ingress controller is forwarded on to the `alpaca` service. You can now access the `alpaca` instance of `kuard` on any of the raw IPs/CNAMEs of the service; in this case, either `alpaca.example.com` or `bandicoot.example.com`.

This doesn't, at this point, add much value above a simple service of type: `LoadBalancer`. We experiment with more complex configurations in the following sections.

## Using Hostnames

Things start to get interesting when we start to direct traffic based on properties of the request. The most common example of this is to have the Ingress system look at the HTTP host header (which is set to the DNS domain in the original URL) and direct traffic based on that header. Let's add *another* Ingress object for directing traffic to the `alpaca` service for any traffic directed to `alpaca.example.com` (see [Example 7-2](#)).

### *Example 7-2. host-ingress.yaml*

---

```
apiVersion: extensions/v1beta1
kind: Ingress
metadata:
  name: host-ingress
spec:
  rules:
  - host: alpaca.example.com
    http:
      paths:
      - backend:
          serviceName: alpaca
          servicePort: 8080
```

Create this Ingress with kubectl apply:

```
$ kubectl apply -f host-ingress.yaml
ingress.extensions/host-ingress created
```

We can verify that things are set up correctly as follows:

```
$ kubectl get ingress
NAME           HOSTS            ADDRESS        PORTS   AGE
host-ingress   alpaca.example.com   80           54s
simple-ingress *                  80           13m

$ kubectl describe ingress host-ingress
Name:           host-ingress
Namespace:      default
Address:
Default backend: default-http-backend:80 (<none>)
Rules:
  Host          Path  Backends
  ----          ----  -----
  alpaca.example.com  /    alpaca:8080 (<none>)
Annotations:
...
Events: <none>
```

There are a couple of things that are a bit confusing here. First, there is a reference to the default-http-backend. This is a convention that

only some Ingress controllers use to handle requests that aren't handled in any other way. These controllers send those requests to a service called `default-http-backend` in the `kube-system` namespace. This convention is surfaced client-side in `kubectl`.

Next, there are no endpoints listed for the `alpaca` backend service. This is a bug in `kubectl` that is fixed in Kubernetes v1.14.

Regardless, you should now be able to address the `alpaca` service via `http://alpaca.example.com`. If instead you reach the service endpoint via other methods, you should get the default service.

## Using Paths

The next interesting scenario is to direct traffic based on not just the hostname, but also the path in the HTTP request. We can do this easily by specifying a path in the `paths` entry (see [Example 7-3](#)). In this example we direct everything coming into `http://bandicoot.example.com` to the `bandicoot` service, but we also send `http://bandicoot.example.com/a` to the `alpaca` service. This type of scenario can be used to host multiple services on different paths of a single domain.

### *Example 7-3. path-ingress.yaml*

---

```
apiVersion: extensions/v1beta1
kind: Ingress
metadata:
  name: path-ingress
spec:
  rules:
  - host: bandicoot.example.com
    http:
      paths:
      - path: "/"
        backend:
          serviceName: bandicoot
          servicePort: 8080
      - path: "/a/"
        backend:
          serviceName: alpaca
          servicePort: 8080
```

When there are multiple paths on the same host listed in the Ingress system, the longest prefix matches. So, in this example, traffic starting with /a/ is forwarded to the alpaca service, while all other traffic (starting with /) is directed to the bandicoot service.

As requests get proxied to the upstream service, the path remains unmodified. That means a request to `bandicoot.example.com/a/` shows up to the upstream server that is configured for that request hostname and path. The upstream service needs to be ready to serve traffic on that subpath. In this case, kuard has special code for testing, where it responds on the root path (/) along with a predefined set of subpaths (/a/, /b/, and /c/).

## Cleaning Up

To clean up, execute the following:

```
$ kubectl delete ingress host-ingress path-ingress simple-ingress
$ kubectl delete service alpaca bandicoot be-default
$ kubectl delete deployment alpaca bandicoot be-default
```

## Advanced Ingress Topics and Gotchas

There are some other fancy features that are supported by Ingress. The level of support for these features differs based on the Ingress controller implementation, and two controllers may implement a feature in slightly different ways.

Many of the extended features are exposed via annotations on the Ingress object. Be careful, as these annotations can be hard to validate and are easy to get wrong. Many of these annotations apply to the entire Ingress object and so can be more general than you might like. To scope the annotations down you can always split a single Ingress object into multiple Ingress objects. The Ingress controller should read them and merge them together.

## Running Multiple Ingress Controllers

Oftentimes, you may want to run multiple Ingress controllers on a single cluster. In that case, you specify which Ingress object is meant for which Ingress controller using the `kubernetes.io/ingress.class` annotation. The value should be a string that specifies which Ingress controller should look at this object. The Ingress controllers themselves, then, should be configured with that same string and should only respect those Ingress objects with the correct annotation.

If the `kubernetes.io/ingress.class` annotation is missing, behavior is undefined. It is likely that multiple controllers will fight to satisfy the Ingress and write the `status` field of the Ingress objects.

## Multiple Ingress Objects

If you specify multiple Ingress objects, the Ingress controllers should read them all and try to merge them into a coherent configuration. However, if you specify duplicate and conflicting configurations, the behavior is undefined. It is likely that different Ingress controllers will behave differently. Even a single implementation may do different things depending on nonobvious factors.

## Ingress and Namespaces

Ingress interacts with namespaces in some nonobvious ways.

First, due to an abundance of security caution, an Ingress object can only refer to an upstream service in the same namespace. This means that you can't use an Ingress object to point a subpath to a service in another namespace.

However, multiple Ingress objects in different namespaces can specify subpaths for the same host. These Ingress objects are then merged together to come up with the final config for the Ingress controller.

This cross-namespace behavior means that it is necessary that Ingress be coordinated globally across the cluster. If not coordinated carefully, an

Ingress object in one namespace could cause problems (and undefined behavior) in other namespaces.

Typically there are no restrictions built into the Ingress controller around what namespaces are allowed to specify what hostnames and paths.

Advanced users may try to enforce a policy for this using a custom admission controller. There are also evolutions of Ingress described in “[The Future of Ingress](#)” that address this problem.

## Path Rewriting

Some Ingress controller implementations support, optionally, doing path rewriting. This can be used to modify the path in the HTTP request as it gets proxied. This is usually specified by an annotation on the Ingress object and applies to all requests that are specified by that object. For example, if we were using the NGINX Ingress controller, we could specify an annotation of `nginx.ingress.kubernetes.io/rewrite-target: /`. This can sometimes make upstream services work on a subpath even if they weren’t built to do so.

There are multiple implementations that not only implement path rewriting, but also support regular expressions when specifying the path. For example, the NGINX controller allows regular expressions to capture parts of the path and then use that captured content when doing rewriting. How this is done (and what variant of regular expressions is used) is implementation-specific.

Path rewriting isn’t a silver bullet, though, and can often lead to bugs. Many web applications assume that they can link within themselves using absolute paths. In that case, the app in question may be hosted on `/subpath` but have requests show up to it on `/`. It may then send a user to `/app-path`. There is then the question of whether that is an “internal” link for the app (in which case it should instead be `/subpath/app-path`) or a link to some other app. For this reason, it is probably best to avoid subpaths if you can help it for any complicated applications.

## Serving TLS

When serving websites, it is becoming increasingly necessary to do so securely using TLS and HTTPS. Ingress supports this (as do most Ingress controllers).

First, users need to specify a secret with their TLS certificate and keys—something like what is outlined in [Example 7-4](#). You can also create a secret imperatively with `kubectl create secret tls <secret-name> --cert <certificate-pem-file> --key <private-key-pem-file>`.

---

### *Example 7-4. tls-secret.yaml*

```
apiVersion: v1
kind: Secret
metadata:
  creationTimestamp: null
  name: tls-secret-name
type: kubernetes.io/tls
data:
  tls.crt: <base64 encoded certificate>
  tls.key: <base64 encoded private key>
```

Once you have the certificate uploaded, you can reference it in an Ingress object. This specifies a list of certificates along with the hostnames that those certificates should be used for (see [Example 7-5](#)). Again, if multiple Ingress objects specify certificates for the same hostname, the behavior is undefined.

---

### *Example 7-5. tls-ingress.yaml*

```
apiVersion: extensions/v1beta1
kind: Ingress
metadata:
  name: tls-ingress
spec:
  tls:
  - hosts:
    - alpaca.example.com
    secretName: tls-secret-name
  rules:
  - host: alpaca.example.com
    http:
```

```
paths:  
- backend:  
  serviceName: alpaca  
  servicePort: 8080
```

Uploading and managing TLS secrets can be difficult. In addition, certificates can often come at a significant cost. To help solve this problem, there is a **non-profit called “Let’s Encrypt”** running a free Certificate Authority that is API-driven. Since it is API-driven, it is possible to set up a Kubernetes cluster that automatically fetches and installs TLS certificates for you. It can be tricky to set up, but when working it’s very simple to use. The missing piece is an open source project called **cert-manager** initiated and supported by Jetstack, a UK startup. Visit its GitHub page for instructions on installing and using cert-manager.

## Alternate Ingress Implementations

There are many different implementations of Ingress controllers, each building on the base Ingress object with unique features. It is a vibrant ecosystem.

First, each cloud provider has an Ingress implementation that exposes the specific cloud-based L7 load balancer for that cloud. Instead of configuring a software load balancer running in a Pod, these controllers take Ingress objects and use them to configure, via an API, the cloud-based load balancers. This reduces the load on the cluster and management burden for the operators, but can often come at a cost.

The most popular generic Ingress controller is probably the open source **NGINX ingress controller**. Be aware that there is also a commercial controller based on the proprietary NGINX Plus. The open source controller essentially reads Ingress objects and merges them into an NGINX configuration file. It then signals to the NGINX process to restart with the new configuration (while responsibly serving existing in-flight connections). The open NGINX controller has an enormous number of features and options exposed via **annotations**.

[Ambassador](#) and [Gloo](#) are two other Envoy-based Ingress controllers that are focused on being API gateways.

[Traefik](#) is a reverse proxy implemented in Go that also can function as an Ingress controller. It has a set of features and dashboards that are very developer-friendly.

This just scratches the surface. The Ingress ecosystem is very active and there are many new projects and commercial offerings that build on the humble Ingress object in unique ways.

## The Future of Ingress

As you have seen, the Ingress object provides a very useful abstraction for configuring L7 load balancers—but it hasn’t scaled to all the features that users want and various implementations are looking to offer.

Many of the features in Ingress are underdefined. Implementations can surface these features in different ways, reducing the portability of configurations between implementations.

Another problem is that it is easy to misconfigure Ingress. The way that multiple objects compose together opens the door for conflicts that are resolved differently by different implementations. In addition, the way that these are merged across namespaces breaks the idea of namespace isolation.

Ingress was also created before the idea of a Service Mesh (exemplified by projects such as Istio and Linkerd) was well known. The intersection of Ingress and Service Meshes is still being defined.. Service meshes are covered in greater detail later on in this book.

The future of HTTP load balancing for Kubernetes looks to be the *Gateway* API which is in the midst of development by the Kubernetes special interest group (SIG) dedicated to Networking. The Gateway API project is intended to develop a more modern API for routing in Kubernetes. Though it is more focused on HTTP balancing Gateway also includes resources for controlling layer 4 (TCP) balancing. The Gateway APIs are still very much

under development so it is strongly recommended that people stick to the existing Ingress and Service resources that are currently present in Kubernetes. The current state of the Gateway APIs can be found at their site: <https://gateway-api.sigs.k8s.io/>.

## Summary

Ingress is a unique system in Kubernetes. It is simply a schema, and the implementations of a controller for that schema must be installed and managed separately. But it is also a critical system for exposing services to users in a practical and cost-efficient way. As Kubernetes continues to mature, expect to see Ingress become more and more relevant.

---

<sup>1</sup> The [Open Systems Interconnection \(OSI\) model](#) is a standard way to describe how different networking layers build on each other. TCP and UDP are considered to be Layer 4, while HTTP is Layer 7.

# Chapter 8. ReplicaSets

---

## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the author’s raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 9th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

Previously, we covered how to run individual containers as Pods. But these Pods are essentially one-off singletons. More often than not, you want multiple replicas of a container running at a particular time. There are a variety of reasons for this type of replication:

### *Redundancy*

Failure toleration by running multiple instances.

### *Scale*

Higher request processing capacity by running multiple instances.

### *Sharding*

Different replicas can handle different parts of a computation in parallel.

Of course, you could manually create multiple copies of a Pod using multiple different (though largely similar) Pod manifests, but doing so is

both tedious and error-prone. Logically, a user managing a replicated set of Pods considers them as a single entity to be defined and managed --and that's precisely what a ReplicaSet is. A ReplicaSet acts as a cluster-wide Pod manager, ensuring that the right types and number of Pods are running at all times.

Because ReplicaSets make it easy to create and manage replicated sets of Pods, they are the building blocks for common application deployment patterns and for self-healing applications at the infrastructure level. Pods managed by ReplicaSets are automatically rescheduled under certain failure conditions, such as node failures and network partitions.

The easiest way to think of a ReplicaSet is that it combines a cookie cutter and a desired number of cookies into a single API object. When we define a ReplicaSet, we define a specification for the Pods we want to create (the “cookie cutter”) and a desired number of replicas. Additionally, we need to define a way of finding Pods that the ReplicaSet should control. The actual act of managing the replicated Pods is an example of a *reconciliation loop*. Such loops are fundamental to most of the design and implementation of Kubernetes.

## Reconciliation Loops

The central concept behind a reconciliation loop is the notion of *desired* state versus *observed* or *current* state. Desired state is the state you want. With a ReplicaSet, it is the desired number of replicas and the definition of the Pod to replicate. For example, “the desired state is that there are three replicas of a Pod running the kuard server.”

In contrast, the current state is the currently observed state of the system. For example, “there are only two kuard Pods currently running.”

The reconciliation loop is constantly running, observing the current state of the world and taking action to try to make the observed state match the desired state. For instance, with the previous examples, the reconciliation

loop would create a new kuard Pod in an effort to make the observed state match the desired state of three replicas.

There are many benefits to the reconciliation loop approach to managing state. It is an inherently goal-driven, self-healing system, yet it can often be easily expressed in a few lines of code.

For example, the reconciliation loop for ReplicaSets is a single loop, yet it handles user actions to scale up or scale down the ReplicaSet as well as node failures or nodes rejoining the cluster after being absent.

We'll see numerous examples of reconciliation loops in action throughout the rest of the book.

## Relating Pods and ReplicaSets

Decoupling is a key theme in Kubernetes. In particular, it's important that all of the core concepts of Kubernetes are modular with respect to each other and that they are swappable and replaceable with other components. In this spirit, the relationship between ReplicaSets and Pods is loosely coupled. Though ReplicaSets create and manage Pods, they do not own the Pods they create. ReplicaSets use label queries to identify the set of Pods they should be managing. They then use the exact same Pod API that you used directly in [Chapter 4](#) to create the Pods that they are managing. This notion of "coming in the front door" is another central design concept in Kubernetes. In a similar decoupling, ReplicaSets that create multiple Pods and the services that load-balance to those Pods are also totally separate, decoupled API objects. In addition to supporting modularity, decoupling Pods and ReplicaSets enables several important behaviors, discussed in the following sections.

## Adopting Existing Containers

Although declarative configuration is valuable, there are times when it is easier to build something up imperatively. In particular, early on you may be simply deploying a single Pod with a container image without a

ReplicaSet managing it. You might even define a load balancer to serve traffic to that single Pod.

But at some point you may want to expand your singleton container into a replicated service and create and manage an array of similar containers. If ReplicaSets owned the Pods they created, then the only way to start replicating your Pod would be to delete it and then relaunch it via a ReplicaSet. This might be disruptive, as there would be a moment in time when there would be no copies of your container running. However, because ReplicaSets are decoupled from the Pods they manage, you can simply create a ReplicaSet that will “adopt” the existing Pod, and scale out additional copies of those containers. In this way, you can seamlessly move from a single imperative Pod to a replicated set of Pods managed by a ReplicaSet.

## Quarantining Containers

Often times, when a server misbehaves, Pod-level health checks will automatically restart that Pod. But if your health checks are incomplete, a Pod can be misbehaving but still be part of the replicated set. In these situations, while it would work to simply kill the Pod, that would leave your developers with only logs to debug the problem. Instead, you can modify the set of labels on the sick Pod. Doing so will disassociate it from the ReplicaSet (and service) so that you can debug the Pod. The ReplicaSet controller will notice that a Pod is missing and create a new copy, but because the Pod is still running it is available to developers for interactive debugging, which is significantly more valuable than debugging from logs.

## Designing with ReplicaSets

ReplicaSets are designed to represent a single, scalable microservice inside your architecture. Their key characteristic is that every Pod the ReplicaSet controller creates is entirely homogeneous. Typically, these Pods are then fronted by a Kubernetes service load balancer, which spreads traffic across the Pods that make up the service. Generally speaking, ReplicaSets are

designed for stateless (or nearly stateless) services. The elements they create are interchangeable; when a ReplicaSet is scaled down, an arbitrary Pod is selected for deletion. Your application's behavior shouldn't change because of such a scale-down operation.

### NOTE

Typically you will see applications utilize the Deployment object, because it allows you to manage the release of new versions. ReplicaSets power Deployments under the hood and it's important to understand how they operate so that you can debug them should you need to troubleshoot.

## ReplicaSet Spec

Like all objects in Kubernetes, ReplicaSets are defined using a specification. All ReplicaSets must have a unique name (defined using the `metadata.name` field), a `spec` section that describes the number of Pods (`replicas`) that should be running cluster-wide at any given time, and a Pod template that describes the Pod to be created when the defined number of replicas is not met. [Example 8-1](#) shows a minimal ReplicaSet definition. Pay attention to the `replicas`, `selector`, and `template` sections of the definition as they provide more insight into how ReplicaSets operate.

---

### *Example 8-1. kuard-rs.yaml*

```
apiVersion: apps/v1
kind: ReplicaSet
metadata:
  labels:
    app: kuard
    version: "2"
  name: kuard
spec:
  replicas: 1
  selector:
    matchLabels:
      app: kuard
      version: "2"
  template:
    metadata:
```

```
  labels:
    app: kuard
    version: "2"
  spec:
    containers:
      - name: kuard
        image: "gcr.io/kuar-demo/kuard-amd64:green"
```

## Pod Templates

As mentioned previously, when the number of Pods in the current state is less than the number of Pods in the desired state, the ReplicaSet controller will create new Pods using a template contained in the ReplicaSet specification. The Pods are created in exactly the same manner as when you created a Pod from a YAML file in previous chapters, but instead of using a file, the Kubernetes ReplicaSet controller creates and submits a Pod manifest based on the Pod template directly to the API server.

The following shows an example of a Pod template in a ReplicaSet:

```
template:
  metadata:
    labels:
      app: helloworld
      version: v1
  spec:
    containers:
      - name: helloworld
        image: kelseyhightower/helloworld:v1
        ports:
          - containerPort: 80
```

## Labels

In any cluster of reasonable size, there are many different Pods running at any given time—so how does the ReplicaSet reconciliation loop discover the set of Pods for a particular ReplicaSet? ReplicaSets monitor cluster state using a set of Pod labels to filter Pod listings and track Pods running within a cluster. When initially created, a ReplicaSet fetches a Pod listing from the Kubernetes API and filters the results by labels. Based on the number of

Pods returned by the query, the ReplicaSet deletes or creates Pods to meet the desired number of replicas. These filtering labels are defined in the ReplicaSet `spec` section and are the key to understanding how ReplicaSets work.

### NOTE

The selector in the ReplicaSet `spec` should be a proper subset of the labels in the Pod template.

## Creating a ReplicaSet

ReplicaSets are created by submitting a ReplicaSet object to the Kubernetes API. In this section we will create a ReplicaSet using a configuration file and the `kubectl apply` command.

The ReplicaSet configuration file in [Example 8-1](#) will ensure one copy of the `gcr.io/kuar-demo/kuard-amd64:green` container is running at any given time.

Use the `kubectl apply` command to submit the `kuard` ReplicaSet to the Kubernetes API:

```
$ kubectl apply -f kuard-rs.yaml
replicaset "kuard" created
```

Once the `kuard` ReplicaSet has been accepted, the ReplicaSet controller will detect that there are no `kuard` Pods running that match the desired state, and create a new `kuard` Pod based on the contents of the Pod template:

```
$ kubectl get pods
NAME      READY     STATUS    RESTARTS   AGE
kuard-yvzgd  1/1     Running   0          11s
```

## Inspecting a ReplicaSet

As with Pods and other Kubernetes API objects, if you are interested in further details about a ReplicaSet, the `describe` command will provide much more information about its state. Here is an example of using `describe` to obtain the details of the ReplicaSet we previously created:

```
$ kubectl describe rs kuard
Name:           kuard
Namespace:      default
Selector:       app=kuard,version=2
Labels:         app=kuard
                version=2
Annotations:    <none>
Replicas:       1 current / 1 desired
Pods Status:   1 Running / 0 Waiting / 0 Succeeded / 0 Failed
Pod Template:
```

You can see the label selector for the ReplicaSet, as well as the state of all of the replicas it manages.

## Finding a ReplicaSet from a Pod

Sometimes you may wonder if a Pod is being managed by a ReplicaSet, and if it is, which one.

To enable this kind of discovery, the ReplicaSet controller adds an `ownerReferences` section to every Pod that it creates. If you run the following, look for the `ownerReferences` section:

```
$ kubectl get pods <pod-name> -
o=jsonpath='{.metadata.ownerReferences[0].name}'
```

If applicable, this will list the name of the ReplicaSet that is managing this Pod.

## Finding a Set of Pods for a ReplicaSet

You can also determine the set of Pods managed by a ReplicaSet. First, get the set of labels using the `kubectl describe` command. In the previous example, the label selector was `app=kuard,version=2`. To find the Pods that match this selector, use the `--selector` flag or the shorthand `-l`:

```
$ kubectl get pods -l app=kuard,version=2
```

This is exactly the same query that the ReplicaSet executes to determine the current number of Pods.

## Scaling ReplicaSets

You can scale ReplicaSets up or down by updating the `spec.replicas` key on the ReplicaSet object stored in Kubernetes. When you scale up a ReplicaSet, it submits new Pods to the Kubernetes API using the Pod template defined on the ReplicaSet.

### Imperative Scaling with `kubectl scale`

The easiest way to achieve this is using the `scale` command in `kubectl`. For example, to scale up to four replicas, you could run:

```
$ kubectl scale replicaset kuard --replicas=4
```

While such imperative commands are useful for demonstrations and quick reactions to emergency situations (such as a sudden increase in load), it is important to also update any text-file configurations to match the number of replicas that you set via the imperative `scale` command. The reason for this becomes obvious when you consider the following scenario:

Alice is on call, when suddenly there is a large increase in load on the service she is managing. Alice uses the `scale` command to increase the number of servers responding to requests to 10, and the situation is

resolved. However, Alice forgets to update the ReplicaSet configurations checked into source control.

Several days later, Bob is preparing the weekly rollouts. Bob edits the ReplicaSet configurations stored in version control to use the new container image, but he doesn't notice that the number of replicas in the file is currently 5, not the 10 that Alice set in response to the increased load. Bob proceeds with the rollout, which both updates the container image and reduces the number of replicas by half. This causes an immediate overload which led to an outage.

This fictional case study illustrates the need to ensure that any imperative changes are immediately followed by a declarative change in source control. Indeed, if the need is not acute, we generally recommend only making declarative changes as described in the following section.

## Declaratively Scaling with kubectl apply

In a declarative world, you make changes by editing the configuration file in version control and then applying those changes to our cluster. To scale the `kuard` ReplicaSet, edit the `kuard-rs.yaml` configuration file and set the replicas count to 3:

```
...
spec:
  replicas: 3
...
```

In a multiuser setting, you would like to have a documented code review of this change and eventually check the changes into version control. Either way, you can then use the `kubectl apply` command to submit the updated `kuard` ReplicaSet to the API server:

```
$ kubectl apply -f kuard-rs.yaml
replicaset "kuard" configured
```

Now that the updated kuard ReplicaSet is in place, the ReplicaSet controller will detect that the number of desired Pods has changed and that it needs to take action to realize that desired state. If you used the imperative `scale` command in the previous section, the ReplicaSet controller will destroy one Pod to get the number to three. Otherwise, it will submit two new Pods to the Kubernetes API using the Pod template defined on the kuard ReplicaSet. Regardless, use the `kubectl get pods` command to list the running kuard Pods. You should see output similar to the following with three Pods in running state, two will have a smaller age because they were recently started:

```
$ kubectl get pods
NAME        READY     STATUS    RESTARTS   AGE
kuard-3a2sb  1/1      Running   0          26s
kuard-wuq9v  1/1      Running   0          26s
kuard-yvzgd  1/1      Running   0          2m
```

## Autoscaling a ReplicaSet

While there will be times when you want to have explicit control over the number of replicas in a ReplicaSet, often you simply want to have “enough” replicas. The definition varies depending on the needs of the containers in the ReplicaSet. For example, with a web server like NGINX, you might want to scale due to CPU usage. For an in-memory cache, you might want to scale with memory consumption. In some cases you might want to scale in response to custom application metrics. Kubernetes can handle all of these scenarios via *Horizontal Pod Autoscaling* (HPA).

## NOTE

HPA requires the presence of the `metrics-server` in your cluster. The metrics server keeps track of metrics and provides an API for consuming metrics that HPA uses when making scaling decisions. Most installations of Kubernetes include `metrics-server` by default. You can validate its presence by listing the Pods in the `kube-system` namespace:

```
$ kubectl get pods --namespace=kube-system
```

You should see a Pod with a name that starts with `metrics-server` somewhere in that list. If you do not see it, autoscaling will not work correctly.

“Horizontal Pod Autoscaling” is kind of a mouthful, and you might wonder why it is not simply called “autoscaling.” Kubernetes makes a distinction between *horizontal* scaling, which involves creating additional replicas of a Pod, and *vertical* scaling, which involves increasing the resources required for a particular Pod (such as increasing the CPU required for the Pod). Many solutions also enable *cluster* autoscaling, where the number of machines in the cluster is scaled in response to resource needs, but that solution is outside the scope of this chapter.

## Autoscaling based on CPU

Scaling based on CPU usage is the most common use case for Pod autoscaling. Generally it is most useful for request-based systems that consume CPU proportionally to the number of requests they are receiving, while using a relatively static amount of memory.

To scale a ReplicaSet, you can run a command like the following:

```
$ kubectl autoscale rs kuard --min=2 --max=5 --cpu-percent=80
```

This command creates an autoscaler that scales between two and five replicas with a CPU threshold of 80%. To view, modify, or delete this resource you can use the standard `kubectl` commands and the `horizontalpodautoscalers` resource.

`horizontalpodautoscalers` is quite a bit to type, but it can be shortened to `hpa`:

```
$ kubectl get hpa
```

## WARNING

Because of the decoupled nature of Kubernetes, there is no direct link between the HPA and the ReplicaSet. While this is great for modularity and composition, it also enables some anti-patterns. In particular, it's a bad idea to combine autoscaling with imperative or declarative management of the number of replicas. If both you and an autoscaler are attempting to modify the number of replicas, it's highly likely that you will clash, resulting in unexpected behavior.

## Deleting ReplicaSets

When a ReplicaSet is no longer required it can be deleted using the `kubectl delete` command. By default, this also deletes the Pods that are managed by the ReplicaSet:

```
$ kubectl delete rs kuard
replicaset "kuard" deleted
```

Running the `kubectl get pods` command shows that all the `kuard` Pods created by the `kuard` ReplicaSet have also been deleted:

```
$ kubectl get pods
```

If you don't want to delete the Pods that the ReplicaSet is managing, you can set the `--cascade=false` flag to `false` to ensure only the ReplicaSet object is deleted and not the Pods:

```
$ kubectl delete rs kuard --cascade=false
```

## Summary

Composing Pods with ReplicaSets provides the foundation for building robust applications with automatic failover, and makes deploying those applications a breeze by enabling scalable and sane deployment patterns. Use ReplicaSets for any Pod you care about, even if it is a single Pod! Some people even default to using ReplicaSets instead of Pods. A typical cluster will have many ReplicaSets, so apply liberally to the affected area.

# Chapter 9. Deployments

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## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the author’s raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 10th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

So far, you have seen how to package your applications as containers, create replicated sets of containers, and use Ingress controllers to load-balance traffic to your services. You can use all of these objects (Pods, ReplicaSets, and Services) to build a single instance of your application. However, they do little to help you manage the daily or weekly cadence of releasing new versions of your application. Indeed, both Pods and ReplicaSets are expected to be tied to specific container images that don’t change.

The Deployment object exists to manage the release of new versions. Deployments represent deployed applications in a way that transcends any particular version. Additionally, Deployments enable you to easily move from one version of your code to the next. This “rollout” process is specifiable and careful. It waits for a user-configurable amount of time between upgrading individual Pods. It also uses health checks to ensure that the new version of the application is operating correctly, and stops the Deployment if too many failures occur.

Using Deployments, you can simply and reliably roll out new software versions without downtime or errors. The actual mechanics of the software rollout performed by a Deployment is controlled by a Deployment controller that runs in the Kubernetes cluster itself. This means you can let a Deployment proceed unattended and it will still operate correctly and safely. This makes it easy to integrate Deployments with numerous continuous delivery tools and services. Further, running server-side makes it safe to perform a rollout from places with poor or intermittent internet connectivity. Imagine rolling out a new version of your software from your phone while riding on the subway. Deployments make this possible and safe!

### NOTE

When Kubernetes was first released, one of the most popular demonstrations of its power was the “rolling update,” which showed how you could use a single command to seamlessly update a running application without any downtime and without losing requests. This original demo was based on the `kubectl rolling-update` command, which is still available in the command-line tool, although its functionality has largely been subsumed by the Deployment object.

## Your First Deployment

Like all objects in Kubernetes, a Deployment can be represented as a declarative YAML object that provides the details about what you want to run. In the following case, the Deployment is requesting a single instance of the `kuard` application:

```
apiVersion: apps/v1
kind: Deployment
metadata:
  name: kuard
  labels:
    run: kuard
spec:
  selector:
    matchLabels:
```

```
    run: kuard
  replicas: 1
  template:
    metadata:
      labels:
        run: kuard
  spec:
    containers:
    - name: kuard
      image: gcr.io/kuar-demo/kuard-amd64:blue
```

Save this YAML file as *kuard-deployment.yaml*, then you can create it using:

```
$ kubectl create -f kuard-deployment.yaml
```

## Deployment Internals

Let's explore how Deployments actually work. Just as we learned that ReplicaSets manage Pods, Deployments manage ReplicaSets. As with all relationships in Kubernetes, this relationship is defined by labels and a label selector. You can see the label selector by looking at the Deployment object:

```
$ kubectl get deployments kuard \
  -o jsonpath --template {.spec.selector.matchLabels}

{"run":"kuard"}
```

From this you can see that the Deployment is managing a ReplicaSet with the label `run=kuard`. You can use this in a label selector query across ReplicaSets to find that specific ReplicaSet:

```
$ kubectl get replicaset --selector=run=kuard
```

NAME	DESIRED	CURRENT	READY	AGE
kuard-1128242161	1	1	1	13m

Now let's look at the relationship between a Deployment and a ReplicaSet in action. We can resize the Deployment using the imperative `scale` command:

```
$ kubectl scale deployments kuard --replicas=2  
deployment.apps/kuard scaled
```

Now if we list that ReplicaSet again, we should see:

```
$ kubectl get replicaset --selector=run=kuard  
NAME          DESIRED   CURRENT   READY   AGE  
kuard-1128242161  2         2         2      13m
```

Scaling the Deployment has also scaled the ReplicaSet it controls.

Now let's try the opposite, scaling the ReplicaSet:

```
$ kubectl scale replicaset kuard-1128242161 --replicas=1  
replicaset.apps/kuard-1128242161 scaled
```

Now get that ReplicaSet again:

```
$ kubectl get replicaset --selector=run=kuard  
NAME          DESIRED   CURRENT   READY   AGE  
kuard-1128242161  2         2         2      13m
```

That's odd. Despite scaling the ReplicaSet to one replica, it still has two replicas as its desired state. What's going on?

Remember, Kubernetes is an online, self-healing system. The top-level Deployment object is managing this ReplicaSet. When you adjust the number of replicas to one, it no longer matches the desired state of the Deployment, which has `replicas` set to 2. The Deployment controller notices this and takes action to ensure the observed state matches the desired state, in this case readjusting the number of replicas back to two.

If you ever want to manage that ReplicaSet directly, you need to delete the Deployment (remember to set `--cascade` to `false`, or else it will delete the ReplicaSet and Pods as well!).

# Creating Deployments

Of course, as stated in the introduction, you should have a preference for declarative management of your Kubernetes configurations. This means maintaining the state of your Deployments in YAML or JSON files on disk.

As a starting point, download this Deployment into a YAML file:

```
$ kubectl get deployments kuard -o yaml > kuard-deployment.yaml  
$ kubectl replace -f kuard-deployment.yaml --save-config
```

If you look in the file, you will see something like this (note that we've removed a lot of read-only and default fields for readability). Pay attention to the annotations, selector, and strategy fields as they provide insight into Deployment specific functionality:

```
apiVersion: apps/v1  
kind: Deployment  
metadata:  
  annotations:  
    deployment.kubernetes.io/revision: "1"  
  creationTimestamp: null  
  generation: 1  
  labels:  
    run: kuard  
  name: kuard  
spec:  
  progressDeadlineSeconds: 600  
  replicas: 1  
  revisionHistoryLimit: 10  
  selector:  
    matchLabels:  
      run: kuard  
  strategy:  
    rollingUpdate:  
      maxSurge: 25%  
      maxUnavailable: 25%  
    type: RollingUpdate  
  template:  
    metadata:  
      creationTimestamp: null  
      labels:  
        run: kuard
```

```
spec:  
  containers:  
    - image: gcr.io/kuar-demo/kuard-amd64:blue  
      imagePullPolicy: IfNotPresent  
      name: kuard  
      resources: {}  
      terminationMessagePath: /dev/termination-log  
      terminationMessagePolicy: File  
    dnsPolicy: ClusterFirst  
    restartPolicy: Always  
    schedulerName: default-scheduler  
    securityContext: {}  
    terminationGracePeriodSeconds: 30  
  status: {}
```

## NOTE

A lot of read-only and default fields were removed in the preceding listing for brevity. You also need to run `kubectl replace --save-config`. This adds an annotation so that, when applying changes in the future, `kubectl` will know what the last applied configuration was for smarter merging of configs. If you always use `kubectl apply`, this step is only required after the first time you create a Deployment using `kubectl create -f`.

The Deployment spec has a very similar structure to the ReplicaSet spec. There is a Pod template, which contains a number of containers that are created for each replica managed by the Deployment. In addition to the Pod specification, there is also a `strategy` object:

```
...  
  strategy:  
    rollingUpdate:  
      maxSurge: 25%  
      maxUnavailable: 25%  
    type: RollingUpdate  
...  
...
```

The `strategy` object dictates the different ways in which a rollout of new software can proceed. There are two different strategies supported by

Deployments: Recreate and RollingUpdate. These are discussed in detail later in this chapter.

## Managing Deployments

As with all Kubernetes objects, you can get detailed information about your Deployment via the `kubectl describe` command. This command provides an overview of the Deployment configuration which includes interesting fields like the Selector, Replicas, and Events:

```
$ kubectl describe deployments kuard

Name:           kuard
Namespace:      default
CreationTimestamp:  Tue, 01 Jun 2021 21:19:46 -0700
Labels:         run=kuard
Annotations:    deployment.kubernetes.io/revision: 1
Selector:       run=kuard
Replicas:       1 desired | 1 updated | 1 total | 1
available | 0 unavailable
StrategyType:   RollingUpdate
MinReadySeconds: 0
RollingUpdateStrategy: 25% max unavailable, 25% max surge
Pod Template:
  Labels:  run=kuard
  Containers:
    kuard:
      Image:      gcr.io/kuar-demo/kuard-amd64:blue
      Port:       <none>
      Host Port: <none>
      Environment: <none>
      Mounts:     <none>
      Volumes:    <none>
  Conditions:
    Type        Status  Reason
    ----        ----  -----
    Available   True    MinimumReplicasAvailable
  OldReplicaSets: <none>
  NewReplicaSet:  kuard-6d69d9fc5c (2/2 replicas created)
Events:
  Type        Reason          Age            From
  Message
  ----        -----          ----          -----

```

```
-----  
Normal  ScalingReplicaSet  4m6s          deployment-  
con...  ...  
Normal  ScalingReplicaSet  113s (x2 over 3m20s)  deployment-  
con...  ...
```

In the output of `describe` there is a great deal of important information.

Two of the most important pieces of information in the output are `OldReplicaSets` and `NewReplicaSet`. These fields point to the `ReplicaSet` objects this Deployment is currently managing. If a Deployment is in the middle of a rollout, both fields will be set to a value. If a rollout is complete, `OldReplicaSets` will be set to `<none>`.

In addition to the `describe` command, there is also the `kubectl rollout` command for Deployments. We will go into this command in more detail later on, but for now, know that you can use `kubectl rollout history` to obtain the history of rollouts associated with a particular Deployment. If you have a current Deployment in progress, you can use `kubectl rollout status` to obtain the current status of a rollout.

## Updating Deployments

Deployments are declarative objects that describe a deployed application. The two most common operations on a Deployment are scaling and application updates.

### Scaling a Deployment

Although we previously showed how to imperatively scale a Deployment using the `kubectl scale` command, the best practice is to manage your Deployments declaratively via the YAML files, then use those files to update your Deployment. To scale up a Deployment, you would edit your YAML file to increase the number of replicas:

```
...  
spec:  
  replicas: 3  
...
```

Once you have saved and committed this change, you can update the Deployment using the `kubectl apply` command:

```
$ kubectl apply -f kuard-deployment.yaml
```

This will update the desired state of the Deployment, causing it to increase the size of the ReplicaSet it manages, and eventually create a new Pod managed by the Deployment:

```
$ kubectl get deployments kuard  
  
NAME      READY     UP-TO-DATE   AVAILABLE   AGE  
kuard    3/3       3           3           10m
```

## Updating a Container Image

The other common use case for updating a Deployment is to roll out a new version of the software running in one or more containers. To do this, you should likewise edit the Deployment YAML file, though in this case you are updating the container image, rather than the number of replicas:

```
...  
  containers:  
  - image: gcr.io/kuar-demo/kuard-amd64:green  
    imagePullPolicy: Always  
...
```

Annotate the template for the Deployment to record some information about the update:

```
...  
spec:  
  ...  
  template:  
    metadata:
```

```
annotations:  
  kubernetes.io/change-cause: "Update to green kuard"  
...
```

## CAUTION

Make sure you add this annotation to the template and not the Deployment itself, since the `kubectl apply` command uses this field in the Deployment object. Also, do not update the `change-cause` annotation when doing simple scaling operations. A modification of `change-cause` is a significant change to the template and will trigger a new rollout.

Again, you can use `kubectl apply` to update the Deployment:

```
$ kubectl apply -f kuard-deployment.yaml
```

After you update the Deployment it will trigger a rollout, which you can then monitor via the `kubectl rollout` command:

```
$ kubectl rollout status deployments kuard  
deployment "kuard" successfully rolled out
```

You can see the old and new ReplicaSets managed by the Deployment along with the images being used. Both the old and new ReplicaSets are kept around in case you want to roll back:

```
$ kubectl get replicaset -o wide
```

NAME	DESIRED	CURRENT	READY	...	IMAGE (S)
...					
kuard-1128242161	0	0	0	...	gcr.io/kuard-
demo/					
...					
kuard-1128635377	3	3	3	...	gcr.io/kuard-
demo/					
...					

If you are in the middle of a rollout and you want to temporarily pause it for some reason (e.g., if you start seeing weird behavior in your system and you want to investigate), you can use the `pause` command:

```
$ kubectl rollout pause deployments kuard
deployment.apps/kuard paused
```

If, after investigation, you believe the rollout can safely proceed, you can use the `resume` command to start up where you left off:

```
$ kubectl rollout resume deployments kuard
deployment.apps/kuard resumed
```

## Rollout History

Kubernetes Deployments maintain a history of rollouts, which can be useful both for understanding the previous state of the Deployment and for rolling back to a specific version.

You can see the Deployment history by running:

```
$ kubectl rollout history deployment kuard
deployment.apps/kuard
REVISION  CHANGE-CAUSE
1          <none>
2          Update to green kuard
```

The revision history is given in oldest to newest order. A unique revision number is incremented for each new rollout. So far we have two: the initial Deployment, and the update of the image to `kuard:green`.

If you are interested in more details about a particular revision, you can add the `--revision` flag to view details about that specific revision:

```
$ kubectl rollout history deployment kuard --revision=2
deployment.apps/kuard with revision #2
Pod Template:
  Labels:            pod-template-hash=54b74ddcd4
                    run=kuard
  Annotations:      kubernetes.io/change-cause: Update to green kuard
  Containers:
    kuard:
      Image:        gcr.io/kuard-demo/kuard-amd64:green
```

```
Port: <none>
Host Port: <none>
Environment: <none>
Mounts: <none>
Volumes: <none>
```

Let's do one more update for this example. Update the kuard version back to blue by modifying the container version number and updating the change-cause annotation. Apply it with `kubectl apply`. The history should now have three entries:

```
$ kubectl rollout history deployment kuard

deployment.apps/kuard
REVISION  CHANGE-CAUSE
1          <none>
2          Update to green kuard
3          Update to blue kuard
```

Let's say there is an issue with the latest release and you want to roll back while you investigate. You can simply undo the last rollout:

```
$ kubectl rollout undo deployments kuard
deployment.apps/kuard rolled back
```

The `undo` command works regardless of the stage of the rollout. You can undo both partially completed and fully completed rollouts. An undo of a rollout is actually simply a rollout in reverse (for example from *v2* to *v1*, instead of from *v1* to *v2*), and all of the same policies that control the rollout strategy apply to the undo strategy as well. You can see the Deployment object simply adjusts the desired replica counts in the managed ReplicaSets:

```
$ kubectl get replicsets -o wide

NAME              DESIRED   CURRENT   READY   ...
...
kuard-1128242161  0         0         0       ...
demo/             ...
kuard-1570155864  0         0         0       ...
demo/             ...
```

```
kuard-2738859366    3          3          ...      gcr.io/kuar-
demo/    ...
```

## CAUTION

When using declarative files to control your production systems, as much as possible, ensure that the checked-in manifests match what is actually running in your cluster. When you do a `kubectl rollout undo` you are updating the production state in a way that isn't reflected in your source control.

An alternative (and perhaps preferable) way to undo a rollout is to revert your YAML file and `kubectl apply` the previous version. In this way, your “change tracked configuration” more closely tracks what is really running in your cluster.

Let's look at the Deployment history again:

```
$ kubectl rollout history deployment kuard

deployment.apps/kuard
REVISION  CHANGE-CAUSE
1          <none>
3          Update to blue kuard
4          Update to green kuard
```

Revision 2 is missing! It turns out that when you roll back to a previous revision, the Deployment simply reuses the template and renames it so that it is the latest revision. What was revision 2 before is now reordered into revision 4.

We previously saw that you can use the `kubectl rollout undo` command to roll back to a previous version of a Deployment. Additionally, you can roll back to a specific revision in the history using the `--to-revision` flag:

```
$ kubectl rollout undo deployments kuard --to-revision=3
deployment.apps/kuard rolled back
$ kubectl rollout history deployment kuard
deployment.apps/kuard
REVISION  CHANGE-CAUSE
1          <none>
```

```
4      Update to green kuard
5      Update to blue kuard
```

Again, the `undo` took revision 3, applied it, and renumbered it as revision 5.

Specifying a revision of 0 is a shorthand way of specifying the previous revision. In this way, `kubectl rollout undo` is equivalent to `kubectl rollout undo --to-revision=0`.

By default, the last 10 revisions of a Deployment is kept attached to the Deployment object itself. It is recommended that if you have Deployments that you expect to keep around for a long time you set a maximum history size for the Deployment revision history. For example, if you do a daily update you may limit your revision history to 14, to keep a maximum of 2 weeks' worth of revisions (if you don't expect to need to roll back beyond 2 weeks).

To accomplish this, use the `revisionHistoryLimit` property in the Deployment specification:

```
...
spec:
  # We do daily rollouts, limit the revision history to two weeks
  # of
  # releases as we don't expect to roll back beyond that.
  revisionHistoryLimit: 14
...
```

## Deployment Strategies

When it comes time to change the version of software implementing your service, a Kubernetes deployment supports two different rollout strategies, `Recreate` and `RollingUpdate`. Let's look at each in turn.

### Recreate Strategy

The `Recreate` strategy is the simpler of the two. It simply updates the ReplicaSet it manages to use the new image and terminates all of the Pods associated with the Deployment. The ReplicaSet notices that it no longer has any replicas and re-creates all Pods using the new image. Once the Pods are re-created, they are running the new version.

While this strategy is fast and simple, it will result in workload downtime. Because of this, the `Recreate` strategy should only be used for test Deployments where a service downtime is acceptable.

## **RollingUpdate Strategy**

The `RollingUpdate` strategy is the generally preferable strategy for any user-facing service. While it is slower than `Recreate`, it is also significantly more sophisticated and robust. Using `RollingUpdate`, you can roll out a new version of your service while it is still receiving user traffic, without any downtime.

As you might infer from the name, the `RollingUpdate` strategy works by updating a few Pods at a time, moving incrementally until all of the Pods are running the new version of your software.

## **Managing multiple versions of your service**

Importantly, this means that for a while, both the new and the old version of your service will be receiving requests and serving traffic. This has important implications for how you build your software. Namely, it is critically important that each version of your software, and each of its clients, is capable of talking interchangeably with both a slightly older and a slightly newer version of your software.

As an example of why this is important, consider the following scenario:

You are in the middle of rolling out your frontend software; half of your servers are running version 1 and half are running version 2. A user makes an initial request to your service and downloads a client-side JavaScript library that implements your UI. This request is serviced by a version 1

server and thus the user receives the version 1 client library. This client library runs in the user's browser and makes subsequent API requests to your service. These API requests happen to be routed to a version 2 server; thus, version 1 of your JavaScript client library is talking to version 2 of your API server. If you haven't ensured compatibility between these versions, your application won't function correctly.

At first, this might seem like an extra burden. But in truth, you always had this problem; you may just not have noticed. Concretely, a user can make a request at time  $t$  just before you initiate an update. This request is serviced by a version 1 server. At  $t_1$  you update your service to version 2. At  $t_2$  the version 1 client code running on the user's browser runs and hits an API endpoint being operated by a version 2 server. No matter how you update your software, you have to maintain backward and forward compatibility for reliable updates. The nature of the `RollingUpdate` strategy simply makes that more clear and explicit.

Note that this doesn't just apply to JavaScript clients—the same thing is true of client libraries that are compiled into other services that make calls to your service. Just because you updated doesn't mean they have updated their client libraries. This sort of backward compatibility is critical to decoupling your service from systems that depend on your service. If you don't formalize your APIs and decouple yourself, you are forced to carefully manage your rollouts with all of the other systems that call into your service. This kind of tight coupling makes it extremely hard to produce the necessary agility to be able to push out new software every week, let alone every hour or every day. In the decoupled architecture shown in [Figure 9-1](#), the frontend is isolated from the backend via an API contract and a load balancer, whereas in the coupled architecture, a thick client compiled into the frontend is used to connect directly to the backends.

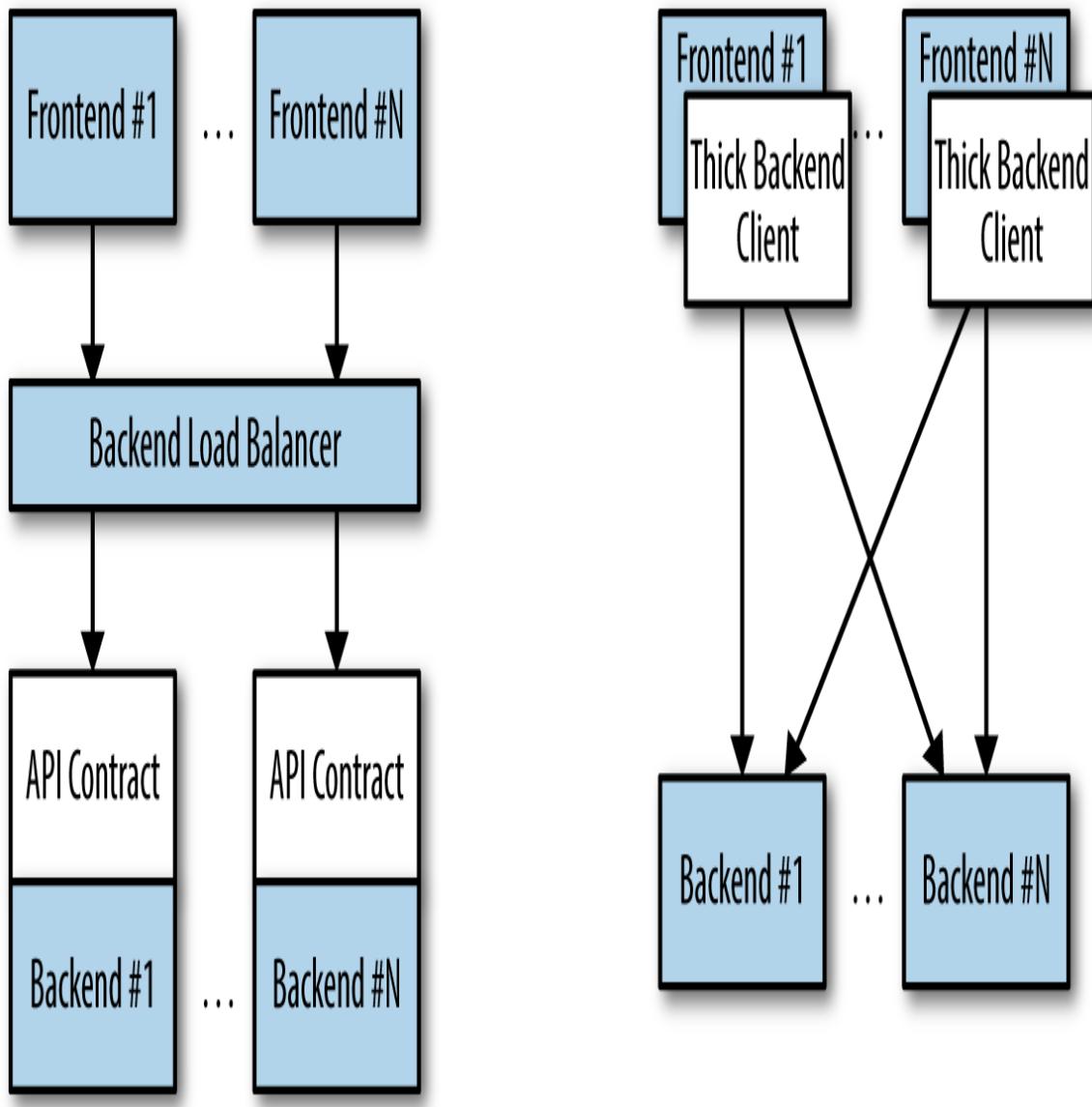


Figure 9-1. Diagrams of both decoupled (left) and coupled (right) application architectures

## Configuring a rolling update

`RollingUpdate` is a fairly generic strategy; it can be used to update a variety of applications in a variety of settings. Consequently, the rolling update itself is quite configurable; you can tune its behavior to suit your particular needs. There are two parameters you can use to tune the rolling update behavior: `maxUnavailable` and `maxSurge`.

The `maxUnavailable` parameter sets the maximum number of Pods that can be unavailable during a rolling update. It can either be set to an absolute number (e.g., 3, meaning a maximum of three Pods can be unavailable) or to a percentage (e.g., 20%, meaning a maximum of 20% of the desired number of replicas can be unavailable). Generally speaking, using a percentage is a good approach for most services, since the value is correctly applicable regardless of the desired number of replicas in the Deployment. However, there are times when you may want to use an absolute number (e.g., limiting the maximum unavailable Pods to one).

At its core, the `maxUnavailable` parameter helps tune how quickly a rolling update proceeds. For example, if you set `maxUnavailable` to 50%, then the rolling update will immediately scale the old ReplicaSet down to 50% of its original size. If you have four replicas, it will scale it down to two replicas. The rolling update will then replace the removed Pods by scaling the new ReplicaSet up to two replicas, for a total of four replicas (two old, two new). It will then scale the old ReplicaSet down to zero replicas, for a total size of two new replicas. Finally, it will scale the new ReplicaSet up to four replicas, completing the rollout. Thus, with `maxUnavailable` set to 50%, the rollout completes in four steps, but with only 50% of the service capacity at times.

Consider what happens if we instead set `maxUnavailable` to 25%. In this situation, each step is only performed with a single replica at a time and thus it takes twice as many steps for the rollout to complete, but availability only drops to a minimum of 75% during the rollout. This illustrates how `maxUnavailable` allows us to trade rollout speed for availability.

### NOTE

The observant among you will note that the `Recreate` strategy is identical to the `RollingUpdate` strategy with `maxUnavailable` set to 100%.

Using reduced capacity to achieve a successful rollout is useful either when your service has cyclical traffic patterns (for example, if there's much less traffic at night) or when you have limited resources, so scaling to larger than the current maximum number of replicas isn't possible.

However, there are situations where you don't want to fall below 100% capacity, but you are willing to temporarily use additional resources in order to perform a rollout. In these situations, you can set the `maxUnavailable` parameter to 0%, and instead control the rollout using the `maxSurge` parameter. Like `maxUnavailable`, `maxSurge` can be specified either as a specific number or a percentage.

The `maxSurge` parameter controls how many extra resources can be created to achieve a rollout. To illustrate how this works, imagine a service with 10 replicas. We set `maxUnavailable` to 0 and `maxSurge` to 20%. The first thing the rollout will do is scale the new ReplicaSet up to 2 replicas, for a total of 12 (120%) in the service. It will then scale the old ReplicaSet down to 8 replicas, for a total of 10 (8 old, 2 new) in the service. This process proceeds until the rollout is complete. At any time, the capacity of the service is guaranteed to be at least 100% and the maximum extra resources used for the rollout are limited to an additional 20% of all resources.

#### NOTE

Setting `maxSurge` to 100% is equivalent to a blue/green Deployment. The Deployment controller first scales the new version up to 100% of the old version. Once the new version is healthy, it immediately scales the old version down to 0%.

## Slowing Rollouts to Ensure Service Health

The purpose of a staged rollout is to ensure that the rollout results in a healthy, stable service running the new software version. To do this, the Deployment controller always waits until a Pod reports that it is ready before moving on to updating the next Pod.

## WARNING

The Deployment controller examines the Pod’s status as determined by its readiness checks. Readiness checks are part of the Pod’s health probes, described in detail in [Chapter 4](#). If you want to use Deployments to reliably roll out your software, you *have* to specify readiness health checks for the containers in your Pod. Without these checks, the Deployment controller is running without context of the Pod’s status.

Sometimes, however, simply noticing that a Pod has become ready doesn’t give you sufficient confidence that the Pod actually is behaving correctly. Some error conditions don’t occur immediately. For example, you could have a serious memory leak that takes a few minutes to show up, or you could have a bug that is only triggered by 1% of all requests. In most real-world scenarios, you want to wait a period of time to have high confidence that the new version is operating correctly before you move on to updating the next Pod.

For Deployments, this time to wait is defined by the `minReadySeconds` parameter:

```
...  
spec:  
  minReadySeconds: 60  
...
```

Setting `minReadySeconds` to 60 indicates that the Deployment must wait for 60 seconds *after* seeing a Pod become healthy before moving on to updating the next Pod.

In addition to waiting for a Pod to become healthy, you also want to set a timeout that limits how long the system will wait. Suppose, for example, the new version of your service has a bug and immediately deadlocks. It will never become ready, and in the absence of a timeout, the Deployment controller will stall your roll-out forever.

The correct behavior in such a situation is to time out the rollout. This in turn marks the rollout as failed. This failure status can be used to trigger

alerting that can indicate to an operator that there is a problem with the rollout.

### NOTE

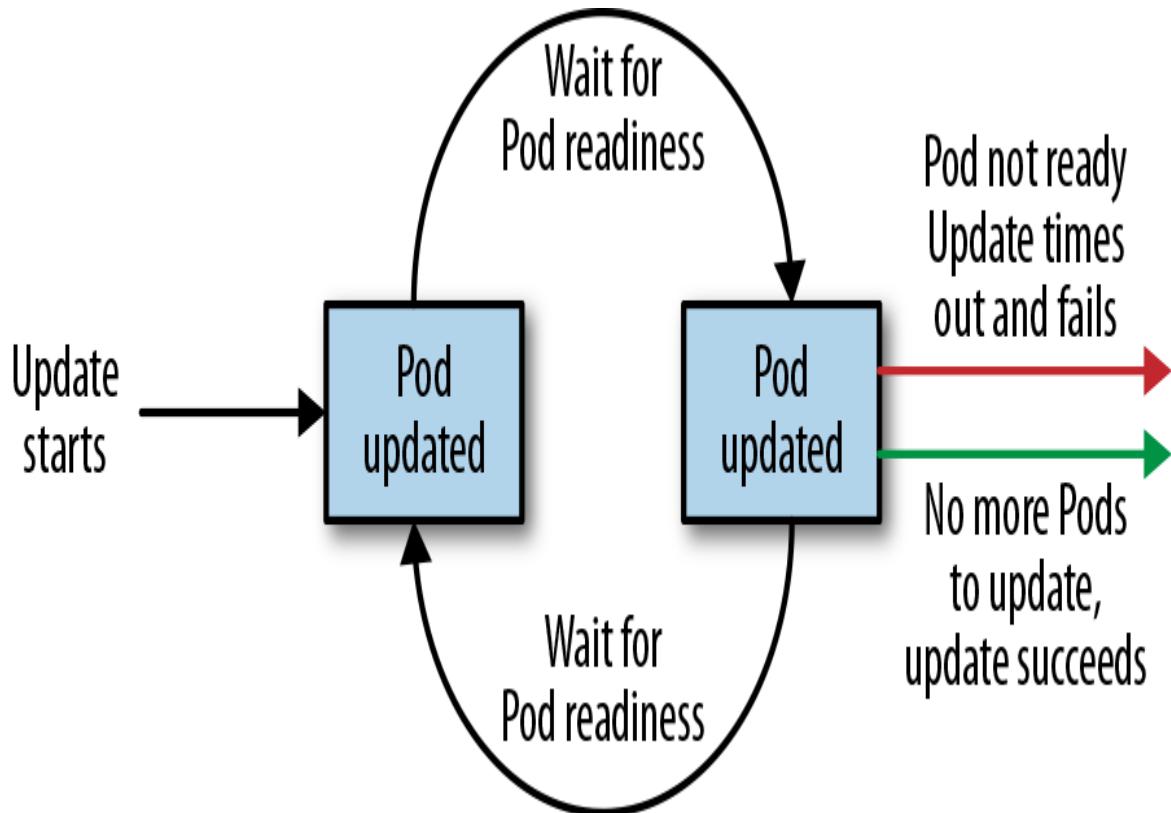
At first blush, timing out a rollout might seem like an unnecessary complication. However, increasingly, things like rollouts are being triggered by fully automated systems with little to no human involvement. In such a situation, timing out becomes a critical exception, which can either trigger an automated rollback of the release or create a ticket/event that triggers human intervention.

To set the timeout period, use the Deployment parameter `progressDeadlineSeconds`:

```
...
spec:
  progressDeadlineSeconds: 600
...
```

This example sets the progress deadline to 10 minutes. If any particular stage in the rollout fails to progress in 10 minutes, then the Deployment is marked as failed, and all attempts to move the Deployment forward are halted.

It is important to note that this timeout is given in terms of Deployment *progress*, not the overall length of a Deployment. In this context, progress is defined as any time the Deployment creates or deletes a Pod. When that happens, the timeout clock is reset to zero. [Figure 9-2](#) shows the Deployment lifecycle.



*Figure 9-2. The Kubernetes Deployment lifecycle*

## Deleting a Deployment

If you ever want to delete a Deployment, you can do it with the imperative command:

```
$ kubectl delete deployments kuard
```

You can also do it using the declarative YAML file you created earlier:

```
$ kubectl delete -f kuard-deployment.yaml
```

In either case, by default, deleting a Deployment deletes the entire service. This means it will delete not just the Deployment, but also any ReplicaSets it manages, as well as any Pods the ReplicaSets manage. As with ReplicaSets, if this is not the desired behavior, you can use the `--cascade=false` flag to delete only the Deployment object.

## Monitoring a Deployment

If a Deployment fails to make progress after a specified amount of time, it will time out. When this happens, the status of the Deployment will transition to a failed state. This status can be obtained from the `status.conditions` array, where there will be a Condition whose `Type` is `Progressing` and whose `Status` is `False`. A Deployment in such a state has failed and will not progress further. To set how long the Deployment controller should wait before transitioning into this state, use the `spec.progressDeadlineSeconds` field.

## Summary

At the end of the day, the primary goal of Kubernetes is to make it easy for you to build and deploy reliable distributed systems. This means not just instantiating the application once, but managing the regularly scheduled rollout of new versions of that software service. Deployments are a critical piece of reliable rollouts and rollout management for your services. In the next chapter we will cover DaemonSets which ensure only a single copy of a Pod is running across a set of nodes in a Kubernetes cluster.

# Chapter 10. DaemonSets

---

## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the author’s raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 11th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

Deployments and ReplicaSets are generally about creating a service (such as a web server) with multiple replicas for redundancy. But that is not the only reason to replicate a set of Pods within a cluster. Another reason is to schedule a single Pod on every node within the cluster. Generally, the motivation for replicating a Pod to every node is to land some sort of agent or daemon on each node, and the Kubernetes object for achieving this is the DaemonSet.

A DaemonSet ensures that a copy of a Pod is running across a set of nodes in a Kubernetes cluster. DaemonSets are used to deploy system daemons such as log collectors and monitoring agents, which typically must run on every node. DaemonSets share similar functionality with ReplicaSets; both create Pods that are expected to be long-running services and ensure that the desired state and the observed state of the cluster match.

Given the similarities between DaemonSets and ReplicaSets, it’s important to understand when to use one over the other. ReplicaSets should be used when your application is completely decoupled from the node and you can

run multiple copies on a given node without special consideration. DaemonSets should be used when a single copy of your application must run on all or a subset of the nodes in the cluster.

You should generally not use scheduling restrictions or other parameters to ensure that Pods do not colocate on the same node. If you find yourself wanting a single Pod per node, then a DaemonSet is the correct Kubernetes resource to use. Likewise, if you find yourself building a homogeneous replicated service to serve user traffic, then a ReplicaSet is probably the right Kubernetes resource to use.

You can use labels to run DaemonSet Pods on specific nodes; for example, you may want to run specialized intrusion-detection software on nodes that are exposed to the edge network.

You can also use DaemonSets to install software on nodes in a cloud-based cluster. For many cloud services, an upgrade or scaling of a cluster can delete and/or recreate new virtual machines. This dynamic *immutable infrastructure* approach can cause problems if you want (or are required by central IT) to have specific software on every node. To ensure that specific software is installed on every machine despite upgrades and scale events, a DaemonSet is the right approach. You can even mount the host filesystem and run scripts that install RPM/DEB packages onto the host operating system. In this way, you can have a cloud-native cluster that still meets the enterprise requirements of your IT department.

## DaemonSet Scheduler

By default a DaemonSet will create a copy of a Pod on every node unless a node selector is used, which will limit eligible nodes to those with a matching set of labels. DaemonSets determine which node a Pod will run on at Pod creation time by specifying the `nodeName` field in the Pod spec. As a result, Pods created by DaemonSets are ignored by the Kubernetes scheduler.

Like ReplicaSets, DaemonSets are managed by a reconciliation control loop that measures the desired state (a Pod is present on all nodes) with the observed state (is the Pod present on a particular node?). Given this information, the DaemonSet controller creates a Pod on each node that doesn't currently have a matching Pod.

If a new node is added to the cluster, then the DaemonSet controller notices that it is missing a Pod and adds the Pod to the new node.

### NOTE

DaemonSets and ReplicaSets are a great demonstration of the value of Kubernetes's decoupled architecture. It might seem that the right design would be for a ReplicaSet to own the Pods it manages, and for Pods to be subresources of a ReplicaSet. Likewise, the Pods managed by a DaemonSet would be subresources of that DaemonSet. However, this kind of encapsulation would require that tools for dealing with Pods be written twice: once for DaemonSets and once for ReplicaSets. Instead, Kubernetes uses a decoupled approach where Pods are top-level objects. This means that every tool you have learned for introspecting Pods in the context of ReplicaSets (e.g., `kubectl logs <pod-name>`) is equally applicable to Pods created by DaemonSets.

## Creating DaemonSets

DaemonSets are created by submitting a DaemonSet configuration to the Kubernetes API server. The DaemonSet in [Example 10-1](#) will create a fluentd logging agent on every node in the target cluster.

### *Example 10-1. fluentd.yaml*

---

```
apiVersion: apps/v1
kind: DaemonSet
metadata:
  name: fluentd
  labels:
    app: fluentd
spec:
  selector:
    matchLabels:
      app: fluentd
  template:
    metadata:
```

```

labels:
  app: fluentd
spec:
  containers:
  - name: fluentd
    image: fluent/fluentd:v0.14.10
    resources:
      limits:
        memory: 200Mi
      requests:
        cpu: 100m
        memory: 200Mi
    volumeMounts:
    - name: varlog
      mountPath: /var/log
    - name: varlibdockercontainers
      mountPath: /var/lib/docker/containers
      readOnly: true
  terminationGracePeriodSeconds: 30
  volumes:
  - name: varlog
    hostPath:
      path: /var/log
  - name: varlibdockercontainers
    hostPath:
      path: /var/lib/docker/containers

```

DaemonSets require a unique name across all DaemonSets in a given Kubernetes namespace. Each DaemonSet must include a Pod template spec, which will be used to create Pods as needed. This is where the similarities between ReplicaSets and DaemonSets end. Unlike ReplicaSets, DaemonSets will create Pods on every node in the cluster by default unless a node selector is used.

Once you have a valid DaemonSet configuration in place, you can use the `kubectl apply` command to submit the DaemonSet to the Kubernetes API. In this section we will create a DaemonSet to ensure the `fluentd` HTTP server is running on every node in our cluster:

```
$ kubectl apply -f fluentd.yaml
daemonset.apps/fluentd created
```

Once the fluentd DaemonSet has been successfully submitted to the Kubernetes API, you can query its current state using the kubectl describe command:

```
$ kubectl describe daemonset fluentd
Name:           fluentd
Selector:       app=fluentd
Node-Selector:  <none>
Labels:         app=fluentd
Annotations:    deprecated.daemonset.template.generation: 1
Desired Number of Nodes Scheduled: 3
Current Number of Nodes Scheduled: 3
Number of Nodes Scheduled with Up-to-date Pods: 3
Number of Nodes Scheduled with Available Pods: 3
Number of Nodes Misscheduled: 0
Pods Status:   3 Running / 0 Waiting / 0 Succeeded / 0 Failed
...
...
```

This output indicates a fluentd Pod was successfully deployed to all three nodes in our cluster. We can verify this using the kubectl get pods command with the -o flag to print the nodes where each fluentd Pod was assigned:

```
$ kubectl get pods -l app=fluentd -o wide
NAME          READY   STATUS    RESTARTS   AGE     IP           NODE
fluentd-1q6c6  1/1    Running   0          13m    10.240.0.101
k0-default-pool-35609c18-z7tb  <none>   <none>
fluentd-mwi7h  1/1    Running   0          13m    10.240.0.80
k0-default-pool-35609c18-ydae  <none>   <none>
fluentd-zr617  1/1    Running   0          13m    10.240.0.44
k0-default-pool-35609c18-pol3  <none>   <none>
```

With the fluentd DaemonSet in place, adding a new node to the cluster will result in a fluentd Pod being deployed to that node automatically:

```
$ kubectl get pods -l app=fluentd -o wide
NAME          READY   STATUS    RESTARTS   AGE     IP           NODE
fluentd-1q6c6  1/1    Running   0          13m    10.240.0.101
k0-default-pool-35609c18-z7tb  <none>   <none>
fluentd-mwi7h  1/1    Running   0          13m    10.240.0.80
```

```
k0-default-pool-35609c18-ydae    <none>      <none>
fluentd-oipmq     1/1      Running     0          43s      10.240.0.96
k0-default-pool-35609c18-0xnl    <none>      <none>
fluentd-zr617     1/1      Running     0          13m      10.240.0.44
k0-default-pool-35609c18-pol3   <none>      <none>
```

This is exactly the behavior you want when managing logging daemons and other cluster-wide services. No action was required from our end; this is how the Kubernetes DaemonSet controller reconciles its observed state with our desired state.

## Limiting DaemonSets to Specific Nodes

The most common use case for DaemonSets is to run a Pod across every node in a Kubernetes cluster. However, there are some cases where you want to deploy a Pod to only a subset of nodes. For example, maybe you have a workload that requires a GPU or access to fast storage only available on a subset of nodes in your cluster. In cases like these, node labels can be used to tag specific nodes that meet workload requirements.

### Adding Labels to Nodes

The first step in limiting DaemonSets to specific nodes is to add the desired set of labels to a subset of nodes. This can be achieved using the `kubectl label` command.

The following command adds the `ssd=true` label to a single node:

```
$ kubectl label nodes k0-default-pool-35609c18-z7tb ssd=true
node/k0-default-pool-35609c18-z7tb labeled
```

Just like with other Kubernetes resources, listing nodes without a label selector returns all nodes in the cluster:

```
$ kubectl get nodes
NAME                  STATUS  ROLES   AGE   VERSION
k0-default-pool-35609c18-0xnl  Ready  agent   23m  v1.21.1
k0-default-pool-35609c18-pol3  Ready  agent   1d   v1.21.1
```

```
k0-default-pool-35609c18-ydae    Ready     agent      1d      v1.21.1
k0-default-pool-35609c18-z7tb    Ready     agent      1d      v1.21.1
```

Using a label selector, we can filter nodes based on labels. To list only the nodes that have the `ssd` label set to `true`, use the `kubectl get nodes` command with the `--selector` flag:

```
$ kubectl get nodes --selector ssd=true
NAME                  STATUS   ROLES   AGE   VERSION
k0-default-pool-35609c18-z7tb   Ready   agent   1d   v1.21.1
```

## Node Selectors

Node selectors can be used to limit what nodes a Pod can run on in a given Kubernetes cluster. Node selectors are defined as part of the Pod spec when creating a DaemonSet. The DaemonSet configuration in [Example 10-2](#) limits NGINX to running only on nodes with the `ssd=true` label set.

### Example 10-2. `nginx-fast-storage.yaml`

---

```
apiVersion: apps/v1
kind: "DaemonSet"
metadata:
  labels:
    app: nginx
    ssd: "true"
  name: nginx-fast-storage
spec:
  selector:
    matchLabels:
      app: nginx
      ssd: "true"
  template:
    metadata:
      labels:
        app: nginx
        ssd: "true"
    spec:
      nodeSelector:
        ssd: "true"
      containers:
        - name: nginx
          image: nginx:1.10.0
```

Let's see what happens when we submit the `nginx-fast-storage` DaemonSet to the Kubernetes API:

```
$ kubectl apply -f nginx-fast-storage.yaml
daemonset.apps/nginx-fast-storage created
```

Since there is only one node with the `ssd=true` label, the `nginx-fast-storage` Pod will only run on that node:

```
$ kubectl get pods -l app=nginx -o wide
NAME                  READY   STATUS    RESTARTS   AGE     IP           NODE
nginx-fast-storage-7b90t   1/1    Running   0          44s   10.240.0.48   k0-default-pool-35609c18-z7tb
<none>
```

Adding the `ssd=true` label to additional nodes will cause the `nginx-fast-storage` Pod to be deployed on those nodes. The inverse is also true: if a required label is removed from a node, the Pod will be removed by the DaemonSet controller.

### WARNING

Removing labels from a node that are required by a DaemonSet's node selector will cause the Pod being managed by that DaemonSet to be removed from the node.

## Updating a DaemonSet

DaemonSets are great for deploying services across an entire cluster, but what about upgrades? Prior to Kubernetes 1.6, the only way to update Pods managed by a DaemonSet was to update the DaemonSet and then manually delete each Pod that was managed by the DaemonSet so that it would be re-created with the new configuration. With the release of Kubernetes 1.6, DaemonSets gained an equivalent to the Deployment object that manages a DaemonSet rollout inside the cluster.

## **Rolling Update of a DaemonSet**

DaemonSets can be rolled out using the same RollingUpdate strategy that deployments use. You can configure the update strategy using the spec.updateStrategy.type field, which should have the value RollingUpdate. When a DaemonSet has an update strategy of RollingUpdate, any change to the spec.template field (or subfields) in the DaemonSet will initiate a rolling update.

As with rolling updates of deployments (see [Chapter 9](#)), the RollingUpdate strategy gradually updates members of a DaemonSet until all of the Pods are running the new configuration. There are two parameters that control the rolling update of a DaemonSet:

- spec.minReadySeconds, which determines how long a Pod must be “ready” before the rolling update proceeds to upgrade subsequent Pods
- spec.updateStrategy.rollingUpdate.maxUnavailable, which indicates how many Pods may be simultaneously updated by the rolling update

You will likely want to set spec.minReadySeconds to a reasonably long value, for example 30–60 seconds, to ensure that your Pod is truly healthy before the rollout proceeds.

The setting for

spec.updateStrategy.rollingUpdate.maxUnavailable is more likely to be application-dependent. Setting it to 1 is a safe, general-purpose strategy, but it also takes a while to complete the rollout (number of nodes × minReadySeconds). Increasing the maximum unavailability will make your rollout move faster, but increases the “blast radius” of a failed rollout. The characteristics of your application and cluster environment dictate the relative values of speed versus safety. A good approach might be to set maxUnavailable to 1 and only increase it if users or administrators complain about DaemonSet rollout speed.

Once a rolling update has started, you can use the `kubectl rollout` commands to see the current status of a DaemonSet rollout.

For example, `kubectl rollout status daemonSets my-daemon-set` will show the current rollout status of a DaemonSet named `my-daemon-set`.

## Deleting a DaemonSet

Deleting a DaemonSet using the `kubectl delete` command is pretty straightforward. Just be sure to supply the correct name of the DaemonSet you would like to delete:

```
$ kubectl delete -f fluentd.yaml
```

### WARNING

Deleting a DaemonSet will also delete all the Pods being managed by that DaemonSet. Set the `--cascade` flag to `false` to ensure only the DaemonSet is deleted and not the Pods.

## Summary

DaemonSets provide an easy-to-use abstraction for running a set of Pods on every node in a Kubernetes cluster, or, if the case requires it, on a subset of nodes based on labels. The DaemonSet provides its own controller and scheduler to ensure key services like monitoring agents are always up and running on the right nodes in your cluster.

For some applications, you simply want to schedule a certain number of replicas; you don't really care where they run as long as they have sufficient resources and distribution to operate reliably. However, there is a different class of applications, like agents and monitoring applications, that need to be present on every machine in a cluster to function properly. These DaemonSets aren't really traditional serving applications, but rather add

additional capabilities and features to the Kubernetes cluster itself. Because the DaemonSet is an active declarative object managed by a controller, it makes it easy to declare your intent that an agent run on every machine without explicitly placing it on every machine. This is especially useful in the context of an autoscaled Kubernetes cluster where nodes may constantly be coming and going without user intervention. In such cases, the DaemonSet automatically adds the proper agents to each node as the autoscaler adds the node to the cluster.

# Chapter 11. Jobs

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## A NOTE FOR EARLY RELEASE READERS

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This will be the 12th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

So far we have focused on long-running processes such as databases and web applications. These types of workloads run until either they are upgraded or the service is no longer needed. While long-running processes make up the large majority of workloads that run on a Kubernetes cluster, there is often a need to run short-lived, one-off tasks. The Job object is made for handling these types of tasks.

A job creates Pods that run until successful termination (for instance, exit with 0). In contrast, a regular Pod will continually restart regardless of its exit code. Jobs are useful for things you only want to do once, such as database migrations or batch jobs. If run as a regular Pod, your database migration task would run in a loop, continually repopulating the database after every exit.

In this chapter we’ll explore the most common job patterns Kubernetes affords. We will also show you how to leverage these patterns in real-life scenarios.

## The Job Object

The Job object is responsible for creating and managing Pods defined in a template in the job specification. These Pods generally run until successful completion. The Job object coordinates running a number of Pods in parallel.

If the Pod fails before a successful termination, the job controller will create a new Pod based on the Pod template in the job specification. Given that Pods have to be scheduled, there is a chance that your job will not execute if the scheduler does not find the required resources. Also, due to the nature of distributed systems, there is a small chance that duplicate Pods will be created for a specific task during certain failure scenarios.

## Job Patterns

Jobs are designed to manage batch-like workloads where work items are processed by one or more Pods. By default, each job runs a single Pod once until successful termination. This job pattern is defined by two primary attributes of a job: namely the number of job completions and the number of Pods to run in parallel. In the case of the “run once until completion” pattern, the completions and parallelism parameters are set to 1.

**Table 11-1** highlights job patterns based on the combination of completions and parallelism for a job configuration.

*T*  
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*t*  
*e*  
*r*  
*n*  
*S*

Type	Use case	Behavior	completions	parallelism
One shot	Database migrations	A single Pod running once until successful termination	1	1
Parallel fixed completions	Multiple Pods processing a set of work in parallel	One or more Pods running one or more times until reaching a fixed completion count	1+	1+

Work queue: parallel jobs	Multiple Pods processing from a centralized work queue	One or more Pods running once until successful termination	1	2+
------------------------------	---	---	---	----

## One Shot

One-shot jobs provide a way to run a single Pod once until successful termination. While this may sound like an easy task, there is some work involved in pulling this off. First, a Pod must be created and submitted to the Kubernetes API. This is done using a Pod template defined in the job configuration. Once a job is up and running, the Pod backing the job must be monitored for successful termination. A job can fail for any number of reasons, including an application error, an uncaught exception during runtime, or a node failure before the job has a chance to complete. In all cases, the job controller is responsible for recreating the Pod until a successful termination occurs.

There are multiple ways to create a one-shot job in Kubernetes. The easiest is to use the `kubectl` command-line tool:

```
$ kubectl run -i oneshot \
--image=gcr.io/kuar-demo/kuard-amd64:blue \
--restart=OnFailure \
--command /kuard \
-- --keygen-enable \
--keygen-exit-on-complete \
--keygen-num-to-gen 10

...
(ID 0) Workload starting
(ID 0 1/10) Item done: SHA256:nAsUsG54XoKRkJwyN+OShkUPKew3mwq7OCc
(ID 0 2/10) Item done: SHA256:HVXK1ANns6SgF/er1lyo+ZCdnB8geFGt0/8
(ID 0 3/10) Item done: SHA256:irjCLRov3mTT0P0JfsvUyhKRQ1TdGR8H1jg
(ID 0 4/10) Item done: SHA256:nbQAIVY/yrhmEGk3Ui2sAHuxb/o6mYO0qRk
(ID 0 5/10) Item done: SHA256:CCpBoXN1XOMQvR2v38yqimXGAa/w2Tym+aI
(ID 0 6/10) Item done: SHA256:wEY2TTIDz4ATjcr1iimxavCzZzNjRmbOQp8
(ID 0 7/10) Item done: SHA256:t3JSrCt7sQweBggG5CrbMoBulwk4lfDWiTl
(ID 0 8/10) Item done: SHA256:E84/Vze7KKyjCh9OZh02MkXJGoty9PhaCec
(ID 0 9/10) Item done: SHA256:UOmYex79qqbI1MhcIfG4hDnGKonlsij2k3s
(ID 0 10/10) Item done: SHA256:WCR8wIGOFlag84Bsa8f/9QHuKqF+0mEnCADY
(ID 0) Workload exiting
```

There are some things to note here:

- The `-i` option to `kubectl` indicates that this is an interactive command. `kubectl` will wait until the job is running and then show the log output from the first (and in this case only) Pod in the job.
- `--restart=OnFailure` is the option that tells `kubectl` to create a Job object.
- All of the options after `--` are command-line arguments to the container image. These instruct our test server (`kuard`) to generate 10 4,096-bit SSH keys and then exit.
- Your output may not match this exactly. `kubectl` often misses the first couple of lines of output with the `-i` option.

After the job has completed, the Job object and related Pod are still around. This is so that you can inspect the log output. Note that this job won't show up in `kubectl get jobs` unless you pass the `-a` flag. Without this flag, `kubectl` hides completed jobs. Delete the job before continuing:

```
$ kubectl delete pods oneshot
```

The other option for creating a one-shot job is using a configuration file, as shown in [Example 11-1](#).

*Example 11-1. job-oneshot.yaml*

---

```
apiVersion: batch/v1
kind: Job
metadata:
  name: oneshot
spec:
  template:
    spec:
      containers:
        - name: kuard
          image: gcr.io/kuar-demo/kuard-amd64:blue
          imagePullPolicy: Always
          command:
            - "/kuard"
          args:
            - "--keygen-enable"
            - "--keygen-exit-on-complete"
```

```
- "--keygen-num-to-gen=10"
restartPolicy: OnFailure
```

Submit the job using the `kubectl apply` command:

```
$ kubectl apply -f job-oneshot.yaml
job.batch/oneshot created
```

Then describe the oneshot job:

```
$ kubectl describe jobs oneshot

Name:           oneshot
Namespace:      default
Selector:       controller-uid=a2ed65c4-cfda-43c8-bb4a-707c4ed29143
Labels:         controller-uid=a2ed65c4-cfda-43c8-bb4a-707c4ed29143
                job-name=oneshot
Annotations:    <none>
Parallelism:   1
Completions:   1
Start Time:    Wed, 02 Jun 2021 21:23:23 -0700
Completed At:  Wed, 02 Jun 2021 21:23:51 -0700
Duration:      28s
Pods Statuses: 0 Running / 1 Succeeded / 0 Failed
Pod Template:
  Labels:  controller-uid=a2ed65c4-cfda-43c8-bb4a-707c4ed29143
            job-name=oneshot
Events:
  ... Reason          Message
  ... -----
  ... SuccessfulCreate  Created pod: oneshot-4kfdt
```

You can view the results of the job by looking at the logs of the Pod that was created:

```
$ kubectl logs oneshot-4kfdt

...
Serving on :8080
(ID 0) Workload starting
(ID 0 1/10) Item done:
SHA256:+r6b4W81DbEjxMcD3LHjU+EIGnLEzbpxITKn8IqhkPI
(ID 0 2/10) Item done:
SHA256:mzHewajaY1KA8VluSLOnNMk9fDE5zdn7vvBS5Ne8AxM
(ID 0 3/10) Item done:
SHA256:TRtEQHfflJmwkqnNyGgQm/IvXNykBIG8c03h0g3onE
```

```
(ID 0 4/10) Item done:  
SHA256:tSwPYH/J347i1/mgqTxRRdeZcOazEtgZ1A8A3/HWbro  
(ID 0 5/10) Item done:  
SHA256:IP8XtguJ6GbWwLHqjKecVfdS96B17nnO21I/TNc1j9k  
(ID 0 6/10) Item done:  
SHA256:ZfNxQvuST/6ZzEVkyxdRG98p73c/5TM99SEbPeRWfc  
(ID 0 7/10) Item done:  
SHA256:tH+CN1/IU1/HUuKdMsq2XEmDQ8oAvmhMO6Iwj8ZEojo  
(ID 0 8/10) Item done:  
SHA256:3GfsUaALVEHQcGNLBOu4Qd1zqqqJ8j738i5r+I5XwVI  
(ID 0 9/10) Item done:  
SHA256:5wV4L/xEiHSJXwLUT2fHf0SCKM2g3XH3sVtNbgskCXw  
(ID 0 10/10) Item done:  
SHA256:bPqqOonwSbjzLqe9ZuVRmZkz+DBjaNTZ9HwmQhbdWLI  
(ID 0) Workload exiting
```

Congratulations, your job has run successfully!

### NOTE

You may have noticed that we didn't specify any labels when creating the Job object. Like with other controllers (such as DaemonSets, ReplicaSets, and Deployments) that use labels to identify a set of Pods, unexpected behaviors can happen if a Pod is reused across objects.

Because jobs have a finite beginning and ending, it is common for users to create many of them. This makes picking unique labels more difficult and more critical. For this reason, the Job object will automatically pick a unique label and use it to identify the Pods it creates. In advanced scenarios (such as swapping out a running job without killing the Pods it is managing), users can choose to turn off this automatic behavior and manually specify labels and selectors.

## Pod failure

We just saw how a job can complete successfully. But what happens if something fails? Let's try that out and see what happens.

Let's modify the arguments to kuard in our configuration file to cause it to fail out with a nonzero exit code after generating three keys, as shown in [Example 11-2](#).

*Example 11-2. job-oneshot-failure1.yaml*

---

```
...  
spec:  
  template:  
    spec:
```

```

containers:
...
args:
- "--keygen-enable"
- "--keygen-exit-on-complete"
- "--keygen-exit-code=1"
- "--keygen-num-to-gen=3"
...

```

Now launch this with `kubectl apply -f job-oneshot-failure1.yaml`. Let it run for a bit and then look at the Pod status:

```
$ kubectl get pod -l job-name=oneshot
```

NAME	READY	STATUS	RESTARTS	AGE
oneshot-3ddk0	0/1	CrashLoopBackOff	4	3m

Here we see that the same Pod has restarted four times. Kubernetes is in CrashLoopBackOff for this Pod. It is not uncommon to have a bug someplace that causes a program to crash as soon as it starts. In that case, Kubernetes will wait a bit before restarting the Pod to avoid a crash loop that would eat resources on the node. This is all handled local to the node by the kubelet without the job being involved at all.

Kill the job (`kubectl delete jobs oneshot`), and let's try something else. Modify the config file again and change the `restartPolicy` from `OnFailure` to `Never`. Launch this with `kubectl apply -f jobs-oneshot-failure2.yaml`.

If we let this run for a bit and then look at related Pods we'll find something interesting:

```
$ kubectl get pod -l job-name=oneshot -a
```

NAME	READY	STATUS	RESTARTS	AGE
oneshot-0wm49	0/1	Error	0	1m
oneshot-6h9s2	0/1	Error	0	39s
oneshot-hkzw0	1/1	Running	0	6s
oneshot-k5swz	0/1	Error	0	28s
oneshot-m1rdw	0/1	Error	0	19s
oneshot-x157b	0/1	Error	0	57s

What we see is that we have multiple Pods here that have errored out. By setting `restartPolicy: Never` we are telling the kubelet not to restart the Pod on failure, but rather just declare the Pod as failed. The Job object then notices and creates a replacement Pod. If you aren't careful, this'll create a lot of "junk" in your cluster. For this reason, we suggest you use `restartPolicy: OnFailure` so failed Pods are rerun in place.

Clean this up with `kubectl delete jobs oneshot`.

So far we've seen a program fail by exiting with a nonzero exit code. But workers can fail in other ways. Specifically, they can get stuck and not make any forward progress. To help cover this case, you can use liveness probes with jobs. If the liveness probe policy determines that a Pod is dead, it'll be restarted or replaced for you.

## Parallelism

Generating keys can be slow. Let's start a bunch of workers together to make key generation faster. We're going to use a combination of the `completions` and `parallelism` parameters. Our goal is to generate 100 keys by having 10 runs of `kuard`, with each run generating 10 keys. But we don't want to swamp our cluster, so we'll limit ourselves to only five Pods at a time.

This translates to setting `completions` to 10 and `parallelism` to 5. The config is shown in [Example 11-3](#).

---

### *Example 11-3. job-parallel.yaml*

---

```
apiVersion: batch/v1
kind: Job
metadata:
  name: parallel
  labels:
    chapter: jobs
spec:
  parallelism: 5
  completions: 10
  template:
    metadata:
      labels:
        chapter: jobs
    spec:
      containers:
```

```

- name: kuard
  image: gcr.io/kuar-demo/kuard-amd64:blue
  imagePullPolicy: Always
  command:
    - /kuard
  args:
    - --keygen-enable
    - --keygen-exit-on-complete
    - --keygen-num-to-gen=10
  restartPolicy: OnFailure

```

Start it up:

```
$ kubectl apply -f job-parallel.yaml
job.batch/parallel created
```

Now watch as the Pods come up, do their thing, and exit. New Pods are created until 10 have completed altogether. Here we use the `--watch` flag to have `kubectl` stay around and list changes as they happen:

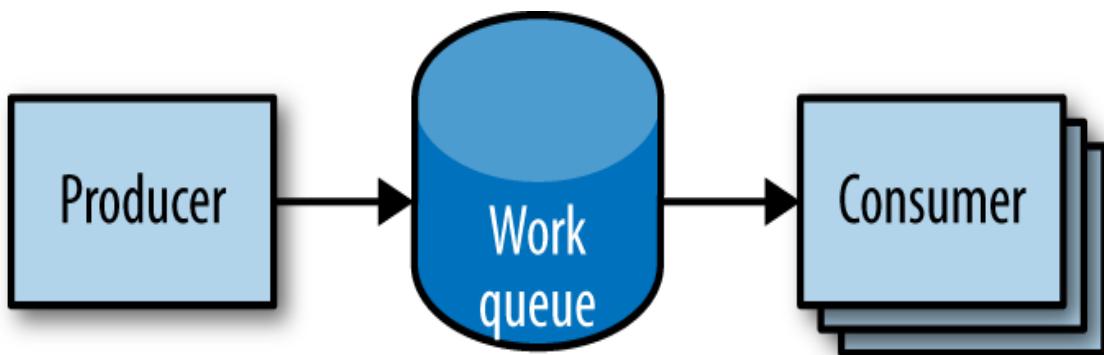
```
$ kubectl get pods -w
NAME        READY   STATUS    RESTARTS   AGE
parallel-55t1v  1/1     Running   0          5s
parallel-5s7s9  1/1     Running   0          5s
parallel-jp7bj  1/1     Running   0          5s
parallel-lssmn  1/1     Running   0          5s
parallel-qxcxp  1/1     Running   0          5s
NAME        READY   STATUS    RESTARTS   AGE
parallel-jp7bj  0/1     Completed  0          26s
parallel-tzp9n  0/1     Pending    0          0s
parallel-tzp9n  0/1     Pending    0          0s
parallel-tzp9n  0/1     ContainerCreating 0          1s
parallel-tzp9n  1/1     Running   0          1s
parallel-tzp9n  0/1     Completed  0          48s
parallel-x1kmr  0/1     Pending    0          0s
parallel-x1kmr  0/1     Pending    0          0s
parallel-x1kmr  0/1     ContainerCreating 0          0s
parallel-x1kmr  1/1     Running   0          1s
parallel-5s7s9  0/1     Completed  0          1m
parallel-tprfj  0/1     Pending    0          0s
parallel-tprfj  0/1     Pending    0          0s
parallel-tprfj  0/1     ContainerCreating 0          0s
parallel-tprfj  1/1     Running   0          2s
parallel-x1kmr  0/1     Completed  0          52s
parallel-bgvz5  0/1     Pending    0          0s
parallel-bgvz5  0/1     Pending    0          0s
parallel-bgvz5  0/1     ContainerCreating 0          0s
```

parallel-bgvz5	1/1	Running	0	2s
parallel-qxcxp	0/1	Completed	0	2m
parallel-xplw2	0/1	Pending	0	1s
parallel-xplw2	0/1	Pending	0	1s
parallel-xplw2	0/1	ContainerCreating	0	1s
parallel-xplw2	1/1	Running	0	3s
parallel-bgvz5	0/1	Completed	0	40s
parallel-55tlv	0/1	Completed	0	2m
parallel-lssmn	0/1	Completed	0	2m

Feel free to study the completed jobs and check out their logs to see the fingerprints of the keys they generated. Clean up by deleting the finished Job object with `kubectl delete job parallel`.

## Work Queues

A common use case for jobs is to process work from a work queue. In this scenario, some task creates a number of work items and publishes them to a work queue. A worker job can be run to process each work item until the work queue is empty ([Figure 11-1](#)).



*Figure 11-1. Parallel jobs*

## Starting a work queue

We start by launching a centralized work queue service. `kuard` has a simple memory-based work queue system built in. We will start an instance of `kuard` to act as a coordinator for all the work.

Next, we create a simple ReplicaSet to manage a singleton work queue daemon. We are using a ReplicaSet to ensure that a new Pod will get created in the face of machine failure, as shown in [Example 11-4](#).

#### *Example 11-4. rs-queue.yaml*

---

```
apiVersion: apps/v1
kind: ReplicaSet
metadata:
  labels:
    app: work-queue
    component: queue
    chapter: jobs
  name: queue
spec:
  replicas: 1
  selector:
    matchLabels:
      app: work-queue
      component: queue
      chapter: jobs
  template:
    metadata:
      labels:
        app: work-queue
        component: queue
        chapter: jobs
    spec:
      containers:
        - name: queue
          image: "gcr.io/kuar-demo/kuard-amd64:blue"
          imagePullPolicy: Always
```

Run the work queue with the following command:

```
$ kubectl apply -f rs-queue.yaml
replicaset.apps/queue created
```

At this point the work queue daemon should be up and running. Let's use port forwarding to connect to it. Leave this command running in a terminal window:

```
$ kubectl port-forward rs/queue 8080:8080
Forwarding from 127.0.0.1:8080 -> 8080
Forwarding from [::1]:8080 -> 8080
```

You can open your browser to <http://localhost:8080> and see the kuard interface. Switch to the “MemQ Server” tab to keep an eye on what is going on.

With the work queue server in place, the next step is to expose it using a service. This will make it easy for producers and consumers to locate the work queue via DNS, as [Example 11-5](#) shows.

---

*Example 11-5. service-queue.yaml*

---

```
apiVersion: v1
kind: Service
metadata:
  labels:
    app: work-queue
    component: queue
    chapter: jobs
  name: queue
spec:
  ports:
  - port: 8080
    protocol: TCP
    targetPort: 8080
  selector:
    app: work-queue
    component: queue
```

Create the queue service with kubectl:

```
$ kubectl apply -f service-queue.yaml
service/queue created
```

## Loading up the queue

We are now ready to put a bunch of work items in the queue. For the sake of simplicity, we'll just use curl to drive the API for the work queue server and insert a bunch of work items. curl will communicate to the work queue through the kubectl port-forward we set up earlier, as shown in [Example 11-6](#).

---

*Example 11-6. load-queue.sh*

---

```
# Create a work queue called 'keygen'
curl -X PUT localhost:8080/memq/server/queues/keygen

# Create 100 work items and load up the queue.
for i in work-item-{0..99}; do
  curl -X POST localhost:8080/memq/server/queues/keygen/enqueue \
    -d "$i"
done
```

Run these commands, and you should see 100 JSON objects output to your terminal with a unique message identifier for each work item. You can confirm the status of the queue by looking at the “MemQ Server” tab in the UI, or you can ask the work queue API directly:

```
$ curl 127.0.0.1:8080/memq/server/stats
{
    "kind": "stats",
    "queues": [
        {
            "depth": 100,
            "dequeued": 0,
            "drained": 0,
            "enqueued": 100,
            "name": "keygen"
        }
    ]
}
```

Now we are ready to kick off a job to consume the work queue until it’s empty.

## Creating the consumer job

This is where things get interesting! kuard can also act in consumer mode. We can set it up to draw work items from the work queue, create a key, and then exit once the queue is empty, as shown in [Example 11-7](#).

### *Example 11-7. job-consumers.yaml*

---

```
apiVersion: batch/v1
kind: Job
metadata:
  labels:
    app: message-queue
    component: consumer
    chapter: jobs
  name: consumers
spec:
  parallelism: 5
  template:
    metadata:
      labels:
        app: message-queue
        component: consumer
        chapter: jobs
    spec:
```

```

containers:
- name: worker
  image: "gcr.io/kuar-demo/kuard-amd64:blue"
  imagePullPolicy: Always
  command:
  - "/kuard"
  args:
  - "--keygen-enable"
  - "--keygen-exit-on-complete"
  - "--keygen-memq-server=http://queue:8080/memq/server"
  - "--keygen-memq-queue=keygen"
restartPolicy: OnFailure

```

Here, we are telling the job to start up five Pods in parallel. As the completions parameter is unset, we put the job into worker-pool mode. Once the first Pod exits with a zero exit code, the job will start winding down and will not start any new Pods. This means that none of the workers should exit until the work is done and they are all in the process of finishing up.

Now, create the consumers job:

```
$ kubectl apply -f job-consumers.yaml
job.batch/consumers created
```

Then you can view the Pods backing the job:

```
$ kubectl get pods
NAME        READY   STATUS    RESTARTS   AGE
queue-43s87 1/1     Running   0          5m
consumers-6wjxc 1/1     Running   0          2m
consumers-715mh 1/1     Running   0          2m
consumers-hvz42 1/1     Running   0          2m
consumers-pc8hr 1/1     Running   0          2m
consumers-w20cc 1/1     Running   0          2m
```

Note there are five Pods running in parallel. These Pods will continue to run until the work queue is empty. You can watch as it happens in the UI on the work queue server. As the queue empties, the consumer Pods will exit cleanly and the consumers job will be considered complete.

## Cleaning up

Using labels, we can clean up all of the stuff we created in this section:

```
$ kubectl delete rs,svc,job -l chapter=jobs
```

## CronJobs

Sometimes you want to schedule a job to be run at a certain interval. To achieve this you can declare a CronJob in Kubernetes, which is responsible for creating a new Job object at a particular interval. [Link to Come] is an example CronJob declaration:

*Example 11-8. job-cronjob.yaml*

---

```
apiVersion: batch/v1
kind: CronJob
metadata:
  name: example-cron
spec:
  # Run every fifth hour
  schedule: "0 */5 * * *"
  jobTemplate:
    spec:
      template:
        spec:
          containers:
            - name: batch-job
              image: my-batch-image
              restartPolicy: OnFailure

apiVersion: batch/v1
kind: CronJob
metadata:
  name: example-cron
spec:
  # Run every fifth hour
  schedule: "0 */5 * * *"
  jobTemplate:
    spec:
      template:
        spec:
          containers:
            - name: batch-job
              image: my-batch-image
              restartPolicy: OnFailure
```

Note the `spec.schedule` field, which contains the interval for the CronJob in standard cron format.

You can save this file as `cron-job.yaml`, and create the CronJob with `kubectl create -f cron-job.yaml`. If you are interested in the current state of a CronJob, you can use `kubectl describe <cron-job>` to get the details.

## Summary

On a single cluster, Kubernetes can handle both long-running workloads such as web applications and short-lived workloads such as batch jobs. The job abstraction allows you to model batch job patterns ranging from simple one-time tasks to parallel jobs that process many items until work has been exhausted.

Jobs are a low-level primitive and can be used directly for simple workloads. However, Kubernetes is built from the ground up to be extensible by higher-level objects. Jobs are no exception; higher-level orchestration systems can easily use them to take on more complex tasks.

# Chapter 12. Integrating Storage Solutions and Kubernetes

---

## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the author’s raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 16th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

In many cases, decoupling state from applications and building your microservices to be as stateless as possible results in maximally reliable, manageable systems.

However, nearly every system that has any complexity has state in the system somewhere, from the records in a database to the index shards that serve results for a web search engine. At some point, you have to have data stored somewhere.

Integrating this data with containers and container orchestration solutions is often the most complicated aspect of building a distributed system. This complexity largely stems from the fact that the move to containerized architectures is also a move toward decoupled, immutable, and declarative application development. These patterns are relatively easy to apply to stateless web applications, but even “cloud-native” storage solutions like

Cassandra or MongoDB involve some sort of manual or imperative steps to set up a reliable, replicated solution.

As an example of this, consider setting up a ReplicaSet in MongoDB, which involves deploying the Mongo daemon and then running an imperative command to identify the leader, as well as the participants in the Mongo cluster. Of course, these steps can be scripted, but in a containerized world it is difficult to see how to integrate such commands into a deployment. Likewise, even getting DNS-resolvable names for individual containers in a replicated set of containers is challenging.

Additional complexity comes from the fact that there is data gravity. Most containerized systems aren't built in a vacuum; they are usually adapted from existing systems deployed onto VMs, and these systems likely include data that has to be imported or migrated.

Finally, evolution to the cloud often means that storage is an externalized cloud service, and in that context it can never really exist inside of the Kubernetes cluster.

This chapter covers a variety of approaches for integrating storage into containerized microservices in Kubernetes. First, we cover how to import existing external storage solutions (either cloud services or running on VMs) into Kubernetes. Next, we explore how to run reliable singletons inside of Kubernetes that enable you to have an environment that largely matches the VMs where you previously deployed storage solutions. Finally, we cover StatefulSets, which are the Kubernetes resource most people use for stateful workloads in Kubernetes.

## Importing External Services

In many cases, you have an existing machine running in your network that has some sort of database running on it. In this situation you may not want to immediately move that database into containers and Kubernetes. Perhaps it is run by a different team, or you are doing a gradual move, or the task of migrating the data is simply more trouble than it's worth.

Regardless of the reasons for staying put, this legacy server and service are not going to move into Kubernetes—but it's still worthwhile to represent this server in Kubernetes. When you do this, you get to take advantage of all of the built-in naming and service-discovery primitives provided by Kubernetes. Additionally, this enables you to configure all your applications so that it looks like the database that is running on a machine somewhere is actually a Kubernetes service. This means that it is trivial to replace it with a database that is a Kubernetes service. For example, in production, you may rely on your legacy database that is running on a machine, but for continuous testing you may deploy a test database as a transient container. Since it is created and destroyed for each test run, data persistence isn't important in the continuous testing case. Representing both databases as Kubernetes services enables you to maintain identical configurations in both testing and production. High fidelity between test and production ensures that passing tests will lead to successful deployment in production.

To see concretely how you maintain high fidelity between development and production, remember that all Kubernetes objects are deployed into *namespaces*. Imagine that we have `test` and `production` namespaces defined. The test service is imported using an object like:

```
kind: Service
metadata:
  name: my-database
  # note 'test' namespace here
  namespace: test
...
```

The production service looks the same, except it uses a different namespace:

```
kind: Service
metadata:
  name: my-database
  # note 'prod' namespace here
  namespace: prod
...
```

When you deploy a Pod into the `test` namespace and it looks up the service named `my-database`, it will receive a pointer to `my-database.test.svc.cluster.internal`, which in turn points to the test database. In contrast, when a Pod deployed in the `prod` namespace looks up the same name (`my-database`) it will receive a pointer to `my-database.prod.svc.cluster.internal`, which is the production database. Thus, the same service name, in two different namespaces, resolves to two different services. For more details on how this works, see [Chapter 6](#).

### NOTE

The following techniques all use database or other storage services, but these approaches can be used equally well with other services that aren't running inside your Kubernetes cluster.

## Services Without Selectors

When we first introduced services, we talked at length about label queries and how they were used to identify the dynamic set of Pods that were the backends for a particular service. With external services, however, there is no such label query. Instead, you generally have a DNS name that points to the specific server running the database. For our example, let's assume that this server is named `database.company.com`. To import this external database service into Kubernetes, we start by creating a service without a Pod selector that references the DNS name of the database server ([Example 12-1](#)).

### *Example 12-1. dns-service.yaml*

---

```
kind: Service
apiVersion: v1
metadata:
  name: external-database
spec:
  type: ExternalName
  externalName: database.company.com
```

When a typical Kubernetes service is created, an IP address is also created and the Kubernetes DNS service is populated with an A record that points to that IP address. When you create a service of type `ExternalName`, the Kubernetes DNS service is instead populated with a CNAME record that points to the external name you specified (`database.company.com` in this case). When an application in the cluster does a DNS lookup for the hostname `external-database.svc.default.cluster`, the DNS protocol aliases that name to `database.company.com`. This then resolves to the IP address of your external database server. In this way, all containers in Kubernetes believe that they are talking to a service that is backed with other containers, when in fact they are being redirected to the external database.

Note that this is not restricted to databases you are running on your own infrastructure. Many cloud databases and other services provide you with a DNS name to use when accessing the database (e.g., `my-database.databases.cloudprovider.com`). You can use this DNS name as the `externalName`. This imports the cloud-provided database into the namespace of your Kubernetes cluster.

Sometimes, however, you don't have a DNS address for an external database service, just an IP address. In such cases, it is still possible to import this service as a Kubernetes service, but the operation is a little different. First, you create a Service without a label selector, but also without the `ExternalName` type we used before ([Example 12-2](#)).

---

*Example 12-2. `external-ip-service.yaml`*

```
kind: Service
apiVersion: v1
metadata:
  name: external-ip-database
```

At this point, Kubernetes will allocate a virtual IP address for this service and populate an A record for it. However, because there is no selector for the service, there will be no endpoints populated for the load balancer to redirect traffic to.

Given that this is an external service, the user is responsible for populating the endpoints manually with an Endpoints resource ([Example 12-3](#)).

*Example 12-3. external-ip-endpoints.yaml*

---

```
kind: Endpoints
apiVersion: v1
metadata:
  name: external-ip-database
subsets:
- addresses:
  - ip: 192.168.0.1
    ports:
    - port: 3306
```

If you have more than one IP address for redundancy, you can repeat them in the `addresses` array. Once the endpoints are populated, the load balancer will start redirecting traffic from your Kubernetes service to the IP address endpoint(s).

**NOTE**

Because the user has assumed responsibility for keeping the IP address of the server up to date, you need to either ensure that it never changes or make sure that some automated process updates the Endpoints record.

## Limitations of External Services: Health Checking

External services in Kubernetes have one significant restriction: they do not perform any health checking. The user is responsible for ensuring that the endpoint or DNS name supplied to Kubernetes is as reliable as necessary for the application.

## Running Reliable Singletons

The challenge of running storage solutions in Kubernetes is often that primitives like ReplicaSet expect that every container is identical and replaceable, but for most storage solutions this isn't the case. One option to

address this is to use Kubernetes primitives, but not attempt to replicate the storage. Instead, simply run a single Pod that runs the database or other storage solution. In this way the challenges of running replicated storage in Kubernetes don't occur, since there is no replication.

At first blush, this might seem to run counter to the principles of building reliable distributed systems, but in general, it is no less reliable than running your database or storage infrastructure on a single virtual or physical machine, which is how many people currently have built their systems. Indeed, in reality, if you structure the system properly the only thing you are sacrificing is potential downtime for upgrades or in case of machine failure. While for large-scale or mission-critical systems this may not be acceptable, for many smaller-scale applications this kind of limited downtime is a reasonable trade-off for the reduced complexity. If this is not true for you, feel free to skip this section and either import existing services as described in the previous section, or move on to Kubernetes-native StatefulSets, described in the following section. For everyone else, we'll review how to build reliable singletons for data storage.

## Running a MySQL Singleton

In this section, we'll describe how to run a reliable singleton instance of the MySQL database as a Pod in Kubernetes, and how to expose that singleton to other applications in the cluster.

To do this, we are going to create three basic objects:

- A persistent volume to manage the lifespan of the on-disk storage independently from the lifespan of the running MySQL application
- A MySQL Pod that will run the MySQL application
- A service that will expose this Pod to other containers in the cluster

In [Chapter 4](#) we described persistent volumes, but a quick review makes sense. A persistent volume is a storage location that has a lifetime independent of any Pod or container. This is very useful in the case of

persistent storage solutions where the on-disk representation of a database should survive even if the containers running the database application crash, or move to different machines. If the application moves to a different machine, the volume should move with it, and data should be preserved. Separating the data storage out as a persistent volume makes this possible.

To begin, we'll create a persistent volume for our MySQL database to use. This example uses NFS for maximum portability, but Kubernetes supports many different persistent volume drive types. For example, there are persistent volume drivers for all major public cloud providers, as well as many private cloud providers. To use these solutions, simply replace `nfs` with the appropriate cloud provider volume type (e.g., `azure`, `awsElasticBlockStore`, or `gcePersistentDisk`). In all cases, this change is all you need. Kubernetes knows how to create the appropriate storage disk in the respective cloud provider. This is a great example of how Kubernetes simplifies the development of reliable distributed systems.

**Example 12-4** shows the `PersistentVolume` object.

---

*Example 12-4. nfs-volume.yaml*

```
apiVersion: v1
kind: PersistentVolume
metadata:
  name: database
  labels:
    volume: my-volume
spec:
  accessModes:
  - ReadWriteMany
  capacity:
    storage: 1Gi
  nfs:
    server: 192.168.0.1
    path: "/exports"
```

This defines an NFS `PersistentVolume` object with 1 GB of storage space.

We can create this persistent volume as usual with:

```
$ kubectl apply -f nfs-volume.yaml
```

Now that we have a persistent volume created, we need to claim that persistent volume for our Pod. We do this with a `PersistentVolumeClaim` object ([Example 12-5](#)).

*Example 12-5. nfs-volume-claim.yaml*

---

```
kind: PersistentVolumeClaim
apiVersion: v1
metadata:
  name: database
spec:
  accessModes:
    - ReadWriteMany
  resources:
    requests:
      storage: 1Gi
  selector:
    matchLabels:
      volume: my-volume
```

The `selector` field uses labels to find the matching volume we defined previously.

This kind of indirection may seem overly complicated, but it has a purpose—it serves to isolate our Pod definition from our storage definition. You can declare volumes directly inside a Pod specification, but this locks that Pod specification to a particular volume provider (e.g., a specific public or private cloud). By using volume claims, you can keep your Pod specifications cloud-agnostic; simply create different volumes, specific to the cloud, and use a `PersistentVolumeClaim` to bind them together. Furthermore, in many cases, the persistent volume controller will actually automatically create a volume for you—there are more details of this process in the following section.

Now that we've claimed our volume, we can use a `ReplicaSet` to construct our singleton Pod. It might seem odd that we are using a `ReplicaSet` to manage a single Pod, but it is necessary for reliability. Remember that once scheduled to a machine, a bare Pod is bound to that machine forever. If the machine fails, then any Pods that are on that machine that are not being managed by a higher-level controller like a `ReplicaSet` vanish along with the machine and are not rescheduled elsewhere. Consequently, to ensure

that our database Pod is rescheduled in the presence of machine failures, we use the higher-level ReplicaSet controller, with a replica size of one, to manage our database ([Example 12-6](#)).

*Example 12-6. mysql-replicaset.yaml*

---

```
apiVersion: extensions/v1
kind: ReplicaSet
metadata:
  name: mysql
  # labels so that we can bind a Service to this Pod
  labels:
    app: mysql
spec:
  replicas: 1
  selector:
    matchLabels:
      app: mysql
  template:
    metadata:
      labels:
        app: mysql
    spec:
      containers:
        - name: database
          image: mysql
          resources:
            requests:
              cpu: 1
              memory: 2Gi
      env:
        # Environment variables are not a best practice for
        security,
        # but we're using them here for brevity in the example.
        # See Chapter 11 for better options.
        - name: MYSQL_ROOT_PASSWORD
          value: some-password-here
      livenessProbe:
        tcpSocket:
          port: 3306
      ports:
        - containerPort: 3306
      volumeMounts:
        - name: database
          # /var/lib/mysql is where MySQL stores its databases
          mountPath: "/var/lib/mysql"
  volumes:
```

```
- name: database
  persistentVolumeClaim:
    claimName: database
```

Once we create the ReplicaSet it will, in turn, create a Pod running MySQL using the persistent disk we originally created. The final step is to expose this as a Kubernetes service ([Example 12-7](#)).

#### *Example 12-7. mysql-service.yaml*

---

```
apiVersion: v1
kind: Service
metadata:
  name: mysql
spec:
  ports:
  - port: 3306
    protocol: TCP
  selector:
    app: mysql
```

Now we have a reliable singleton MySQL instance running in our cluster and exposed as a service named mysql, which we can access at the full domain name mysql.svc.default.cluster.

Similar instructions can be used for a variety of data stores, and if your needs are simple and you can survive limited downtime in the face of a machine failure or when you need to upgrade the database software, a reliable singleton may be the right approach to storage for your application.

## **Dynamic Volume Provisioning**

Many clusters also include *dynamic volume provisioning*. With dynamic volume provisioning, the cluster operator creates one or more StorageClass objects. [Example 12-8](#) shows a default storage class that automatically provisions disk objects on the Microsoft Azure platform.

#### *Example 12-8. storageclass.yaml*

---

```
apiVersion: storage.k8s.io/v1
kind: StorageClass
metadata:
  name: default
  annotations:
```

```
storageclass.beta.kubernetes.io/is-default-class: "true"
labels:
  kubernetes.io/cluster-service: "true"
provisioner: kubernetes.io/azure-disk
```

Once a storage class has been created for a cluster, you can refer to this storage class in your persistent volume claim, rather than referring to any specific persistent volume. When the dynamic provisioner sees this storage claim, it uses the appropriate volume driver to create the volume and bind it to your persistent volume claim.

**Example 12-9** shows an example of a `PersistentVolumeClaim` that uses the default storage class we just defined to claim a newly created persistent volume.

*Example 12-9. `dynamic-volume-claim.yaml`*

---

```
kind: PersistentVolumeClaim
apiVersion: v1
metadata:
  name: my-claim
  annotations:
    volume.beta.kubernetes.io/storage-class: default
spec:
  accessModes:
  - ReadWriteOnce
  resources:
    requests:
      storage: 10Gi
```

The `volume.beta.kubernetes.io/storage-class` annotation is what links this claim back up to the storage class we created.

## CAUTION

Automatic provisioning of a persistent volume is a great feature that makes it significantly easier to build and manage stateful applications in Kubernetes. However, the lifespan of these persistent volumes is dictated by the reclamation policy of the `PersistentVolumeClaim` and the default is to bind that lifespan to the lifespan of the Pod that creates the volume.

This means that if you happen to delete the Pod (e.g., via a scale-down or other event), then the volume is deleted as well. While this may be what you want in certain circumstances, you need to be careful to ensure that you don't accidentally delete your persistent volumes.

Persistent volumes are great for traditional applications that require storage, but if you need to develop high-availability, scalable storage in a Kubernetes-native fashion, the newly released StatefulSet object can be used instead. We'll describe how to deploy MongoDB using StatefulSets in the next section.

## Kubernetes-Native Storage with StatefulSets

When Kubernetes was first developed, there was a heavy emphasis on homogeneity for all replicas in a replicated set. In this design, no replica had an individual identity or configuration. It was up to the application developer to determine a design that could establish this identity for their application.

While this approach provides a great deal of isolation for the orchestration system, it also makes it quite difficult to develop stateful applications. After significant input from the community and a great deal of experimentation with various existing stateful applications, StatefulSets were introduced in Kubernetes version 1.5.

## Properties of StatefulSets

StatefulSets are replicated groups of Pods, similar to ReplicaSets. But unlike a ReplicaSet, they have certain unique properties:

- Each replica gets a persistent hostname with a unique index (e.g., database-0, database-1, etc.).
- Each replica is created in order from lowest to highest index, and creation will block until the Pod at the previous index is healthy and available. This also applies to scaling up.
- When a StatefulSet is deleted, each of the managed replica Pods is also deleted in order from highest to lowest. This also applies to scaling down the number of replicas.

It turns out that this simple set of requirements makes it drastically easier to deploy storage applications on Kubernetes. For example, the combination of stable hostnames (e.g., database-0) and the ordering constraints mean that all replicas, other than the first one, can reliably reference database-0 for the purposes of discovery and establishing replication quorum.

## Manually Replicated MongoDB with StatefulSets

In this section, we'll deploy a replicated MongoDB cluster. For now, the replication setup itself will be done manually to give you a feel for how StatefulSets work. Eventually we will automate this setup as well.

To start, we'll create a replicated set of three MongoDB Pods using a StatefulSet object ([Example 12-10](#)).

*Example 12-10. mongo-simple.yaml*

---

```
apiVersion: apps/v1
kind: StatefulSet
metadata:
  name: mongo
spec:
  serviceName: "mongo"
  replicas: 3
  selector:
    matchLabels:
      app: mongo
  template:
    metadata:
```

```

labels:
  app: mongo
spec:
  containers:
    - name: mongodb
      image: mongo:3.4.24
      command:
        - mongod
        - --replSet
        - rs0
      ports:
        - containerPort: 27017
          name: peer

```

As you can see, the definition is similar to the ReplicaSet definitions we've seen previously. The only changes are in the `apiVersion` and `kind` fields.

Create the StatefulSet:

```
$ kubectl apply -f mongo-simple.yaml
```

Once created, the differences between a ReplicaSet and a StatefulSet become apparent. Run `kubectl get pods` and you will likely see:

NAME	READY	STATUS	RESTARTS	AGE
mongo-0	1/1	Running	0	1m
mongo-1	0/1	ContainerCreating	0	10s

There are two important differences between this and what you would see with a ReplicaSet. The first is that each replicated Pod has a numeric index (0, 1, ...), instead of the random suffix that is added by the ReplicaSet controller. The second is that the Pods are being slowly created in order, not all at once as they would be with a ReplicaSet.

Once the StatefulSet is created, we also need to create a “headless” service to manage the DNS entries for the StatefulSet. In Kubernetes a service is called “headless” if it doesn’t have a cluster virtual IP address. Since with StatefulSets each Pod has a unique identity, it doesn’t really make sense to have a load-balancing IP address for the replicated service. You can create a

headless service using `clusterIP`: `None` in the service specification ([Example 12-11](#)).

*Example 12-11. mongo-service.yaml*

---

```
apiVersion: v1
kind: Service
metadata:
  name: mongo
spec:
  ports:
  - port: 27017
    name: peer
  clusterIP: None
  selector:
    app: mongo
```

Once you create that service, there are usually four DNS entries that are populated. As usual, `mongo.default.svc.cluster.local` is created, but unlike with a standard service, doing a DNS lookup on this hostname provides all the addresses in the StatefulSet. In addition, entries are created for `mongo-0.mongo.default.svc.cluster.local` as well as `mongo-1.mongo` and `mongo-2.mongo`. Each of these resolves to the specific IP address of the replica index in the StatefulSet. Thus, with StatefulSets you get well-defined, persistent names for each replica in the set. This is often very useful when you are configuring a replicated storage solution. You can see these DNS entries in action by running the following commands in one of the Mongo replicas:

```
$ kubectl run -it --rm --image busybox busybox ping mongo-1.mongo
```

Next, we're going to manually set up Mongo replication using these per-Pod hostnames.

We'll choose `mongo-0.mongo` to be our initial primary. Run the `mongo` tool in that Pod:

```
$ kubectl exec -it mongo-0 mongo
> rs.initiate( {
  _id: "rs0",
  members: [ { _id: 0, host: "mongo-0.mongo:27017" } ]
```

```
});  
OK
```

This command tells mongoDB to initiate the ReplicaSet `rs0` with `mongo-0.mongo` as the primary replica.

### NOTE

The `rs0` name is arbitrary. You can use whatever you'd like, but you'll need to change it in the `mongo-simple.yaml` StatefulSet definition as well.

Once you have initiated the Mongo ReplicaSet, you can add the remaining replicas by running the following commands in the `mongo` tool on the `mongo-0.mongo` Pod:

```
> rs.add("mongo-1.mongo:27017");  
> rs.add("mongo-2.mongo:27017");
```

As you can see, we are using the replica-specific DNS names to add them as replicas in our Mongo cluster. At this point, we're done. Our replicated MongoDB is up and running. But it's really not as automated as we'd like it to be—in the next section, we'll see how to use scripts to automate the setup.

## Automating MongoDB Cluster Creation

To automate the deployment of our StatefulSet-based MongoDB cluster, we're going to add an additional container to our Pods to perform the initialization.

To configure this Pod without having to build a new Docker image, we're going to use a ConfigMap to add a script into the existing MongoDB image..

We are going to run this script using an *initialization container*. Initialization containers (or “init” containers) are specialized containers that

run once at the startup of a Pod. They are generally used for cases like this where there is a small amount of setup work that is useful to do before the main application runs. In the Pod definition there is a separate `initContainers` list where init containers can be defined. An example of this is given below.

```
...
  initContainers:
  - name: init-mongo
    image: mongo:3.4.24
    command:
      - bash
      - /config/init.sh
    volumeMounts:
      - name: config
        mountPath: /config
...
  volumes:
  - name: config
    configMap:
      name: "mongo-init"
```

Note that it is mounting a ConfigMap volume whose name is `mongo-init`. This ConfigMap holds a script that performs our initialization. First, the script determines whether it is running on `mongo-0` or not. If it is on `mongo-0`, it creates the ReplicaSet using the same command we ran imperatively previously. If it is on a different Mongo replica, it waits until the ReplicaSet exists, and then it registers itself as a member of that ReplicaSet.

**Example 12-12** has the complete ConfigMap object.

---

*Example 12-12. mongo-configmap.yaml*

```
apiVersion: v1
kind: ConfigMap
metadata:
  name: mongo-init
data:
  init.sh: |
    #!/bin/bash

    # Need to wait for the readiness health check to pass so that
```

```

the
# mongo names resolve. This is kind of wonky.
until ping -c 1 ${HOSTNAME}.mongo; do
    echo "waiting for DNS (${HOSTNAME}.mongo) ..."
    sleep 2
done

until /usr/bin/mongo --eval 'printjson(db.serverStatus())'; do
    echo "connecting to local mongo..."
    sleep 2
done
echo "connected to local."

HOST= mongo-0.mongo:27017

until /usr/bin/mongo --host=${HOST} --eval
'printjson(db.serverStatus())'; do
    echo "connecting to remote mongo..."
    sleep 2
done
echo "connected to remote."

if [[ "${HOSTNAME}" != 'mongo-0' ]]; then
    until /usr/bin/mongo --host=${HOST} --
eval="printjson(rs.status())" \
        | grep -v "no replset config has been received"; do
        echo "waiting for replication set initialization"
        sleep 2
    done
    echo "adding self to mongo-0"
    /usr/bin/mongo --host=${HOST} \
        --eval="printjson(rs.add('${HOSTNAME}.mongo'))"
fi

if [[ "${HOSTNAME}" == 'mongo-0' ]]; then
    echo "initializing replica set"
    /usr/bin/mongo --eval="printjson(rs.initiate(\`\
        {'_id': 'rs0', 'members': [{}{'_id': 0, \
        'host': 'mongo-0.mongo:27017'}]}))"
fi
echo "initialized"

```

You'll notice that this script immediately exits. This is important when using `initContainers`. Each initialization container waits until the previous container is done, before running. The main application container

waits until all of the initialization containers are done. If this script didn't exit, the main mongo server would never start up.

Putting it all together, [Example 12-13](#) is the complete StatefulSet that uses the ConfigMap.

*Example 12-13. mongo.yaml*

---

```
apiVersion: apps/v1
kind: StatefulSet
metadata:
  name: mongo
spec:
  serviceName: "mongo"
  replicas: 3
  selector:
    matchLabels:
      app: mongo
  template:
    metadata:
      labels:
        app: mongo
    spec:
      containers:
        - name: mongodb
          image: mongo:3.4.24
          command:
            - mongod
            - --replSet
            - rs0
          ports:
            - containerPort: 27017
              name: web
          # This container initializes the mongodb server, then sleeps.
        - name: init-mongo
          image: mongo:3.4.24
          command:
            - bash
            - /config/init.sh
          volumeMounts:
            - name: config
              mountPath: /config
      volumes:
        - name: config
          configMap:
            name: "mongo-init"
```

Given all of these files, you can create a Mongo cluster with:

```
$ kubectl apply -f mongo-config-map.yaml
$ kubectl apply -f mongo-service.yaml
$ kubectl apply -f mongo-simple.yaml
```

Or if you want, you can combine them all into a single YAML file where the individual objects are separated by ---. Ensure that you keep the same ordering, since the StatefulSet definition relies on the ConfigMap definition existing.

## Persistent Volumes and StatefulSets

For persistent storage, you need to mount a persistent volume into the /data/db directory. In the Pod template, you need to update it to mount a persistent volume claim to that directory:

```
...
volumeMounts:
- name: database
  mountPath: /data/db
```

While this approach is similar to the one we saw with reliable singletons, because the StatefulSet replicates more than one Pod you cannot simply reference a persistent volume claim. Instead, you need to add a *persistent volume claim template*. You can think of the claim template as being identical to the Pod template, but instead of creating Pods, it creates volume claims. You need to add the following onto the bottom of your StatefulSet definition:

```
volumeClaimTemplates:
- metadata:
    name: database
  annotations:
    volume.alpha.kubernetes.io/storage-class: anything
  spec:
    accessModes: [ "ReadWriteOnce" ]
    resources:
```

```
requests:  
  storage: 100Gi
```

When you add a volume claim template to a StatefulSet definition, each time the StatefulSet controller creates a Pod that is part of the StatefulSet it will create a persistent volume claim based on this template as part of that Pod.

### NOTE

In order for these replicated persistent volumes to work correctly, you either need to have autoprovioning set up for persistent volumes, or you need to prepopulate a collection of persistent volume objects for the StatefulSet controller to draw from. If there are no claims that can be created, the StatefulSet controller will not be able to create the corresponding Pods.

## One Final Thing: Readiness Probes

The final piece in productionizing our MongoDB cluster is to add liveness checks to our Mongo-serving containers. As we learned in “[Health Checks](#)”, the liveness probe is used to determine if a container is operating correctly. For the liveness checks, we can use the mongo tool itself by adding the following to the Pod template in the StatefulSet object:

```
...  
livenessProbe:  
  exec:  
    command:  
      - /usr/bin/mongo  
      - --eval  
      - db.serverStatus()  
  initialDelaySeconds: 10  
  timeoutSeconds: 10  
...
```

## Summary

Once we have combined StatefulSets, persistent volume claims, and liveness probing, we have a hardened, scalable cloud-native MongoDB installation running on Kubernetes. While this example dealt with MongoDB, the steps for creating StatefulSets to manage other storage solutions are quite similar and similar patterns can be followed.

# Chapter 13. Accessing Kubernetes from Common Programming Languages

---

## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the authors’ raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 18th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

Though most of this book is dedicated to using declarative YAML configurations either directly via `kubectl` or through tools like Helm, there are situations when it is necessary to interact with the Kubernetes API directly from a programming language. For example the authors of the Helm tool itself needed to write that application in a programming language. More generally this is common if you need to write some additional tool, like a `kubectl` plugin, or a more complex piece of code, like a Kubernetes operator.

While much of the Kubernetes ecosystem is written in the Go programming language, and indeed the Go client for Kubernetes has the richest and most extensive client. There are a high quality clients for most common programming languages (and even some uncommon ones as well). Because

there is so much documentation, code and examples of how to use the Go client already out on the internet, this chapter will cover the basics of interacting with the Kubernetes API server with examples in Python, Java and C#.

## The Kubernetes API: A client's perspective

At the end of the day, the Kubernetes API server is just an HTTP(S) server and that is exactly how each client library perceives it. Though each client has a lot of additional logic that implements the various API calls and serializes to and from JSON. Given this, you might be tempted to simply use a plain HTTP client to work with the Kubernetes APIs, but the client libraries wrap these various HTTP calls into meaningful APIs (e.g. `readNamespacedPod(...)`) that make your code more readable, and meaningful typed object-models (e.g. `Deployment`) which facilitate static type-checking and therefore fewer bugs. Perhaps more importantly, the client libraries also implement Kubernetes specific capabilities like loading authorization information from a “Kubeconfig” file or from a Pod’s environment. The clients also provide implementations of the non RESTful parts of the Kubernetes API surface area like port-forward, logs and watches. We’ll describe these advanced capabilities in later sections.

## OpenAPI and generated client libraries

The set of resources and functions in the Kubernetes API is huge. There are many different resources in different api groups and many different operations on each of these resources. Keeping up with all of these different resources and resource versions would be a massive (and unmistakeably boring) undertaking if developers had to hand-author all of these API calls. Especially when considering that clients have to be hand-written across each of the different programming languages. Instead the clients take a different approach and the basics of interacting with the Kubernetes API server are all generated by a computer program that is sort of like a compiler in reverse. The code generator for the API clients takes a data

specification for the Kubernetes API and uses this specification to generate a client for a specific language.

The Kubernetes API is expressed in a format known as OpenAPI (or previously as Swagger) which is the most common schema for representing RESTful APIs. To give you a sense of the size of the Kubernetes API, the OpenAPI specification found on GitHub

(<https://github.com/kubernetes/kubernetes/blob/master/api/openapi-spec/swagger.json>) is over four megabytes in size. That's a pretty big text file! The official Kubernetes client libraries are all generated using the same core code generation logic, which can be found on GitHub at <https://github.com/kubernetes-client/gen>. It is unlikely that you will actually have to generate the client libraries yourself, but nonetheless it is useful to understand the process by which these libraries are created. In particular, because most of the client code is generated, updates and fixes can't be made directly in the generated client code, since it would be overwritten the next time the API was generated. Instead, when an error in a client is found, fixes need to be made to either the OpenAPI specification (if the error is in the specification itself) or in the code generator (if the error is in the generated code). Although this process can seem excessively complex, it is the only way that a small number of Kubernetes client authors can keep up with the breadth of the Kubernetes API.

## But what about `kubectl x . . .`?

When you start implementing your own logic for interacting with the Kubernetes API, it probably won't be long before you find yourself asking how to do `kubectl x`. Most people start with the `kubectl` tool when they begin learning Kubernetes and they consequently expect that there is a 1-1 mapping between the capabilities in `kubectl` and the Kubernetes API. While it is the case that some commands (e.g. `kubectl get pods`) are directly represented in the Kubernetes API. Most of the more sophisticated features are actually a larger number of API calls with complex logic in the `kubectl` tool.

This balance between client side and server side features has been a design trade-off since the beginning of Kubernetes. Many features that are now present in the API server began as client side implementations in `kubectl`. For example, the rollout capabilities now implemented on the server by the Deployment resource were previously implemented in the client. Likewise until very recently `kubectl apply ...` was only available within the command line tool, but was migrated to the server as the server side apply capabilities that will be discussed later in this chapter.

Despite the general trajectory towards server side implementations, there are still significant capabilities which remain in the client. For these capabilities, there has been significant work in some of the clients (e.g. the `io.kubernetes.client.extended.kubectl` package in the Java client) that attempt to emulate many of the `kubectl` capabilities.

If you can't find the functionality that you are looking for in your client library, a useful trick is to add the `--v=10` flag to your `kubectl` command which will turn on verbose logging including all of the HTTP requests and responses sent to the Kubernetes API server. You can use this logging to reconstruct much of what `kubectl` is doing. If you still need to dig deeper, the `kubectl` source code is also available within the Kubernetes repository.

## Programming the Kubernetes API

Now you have a deeper perspective about how the Kubernetes API works and the client and server interact. In the following sections we'll go through how to authenticated to the Kubernetes API server, interact with resources and finally close with advanced topics from writing operators to interacting with Pods for interactive operations.

### Installing the client libraries

Before you can start programming with the Kubernetes API you need to find the client libraries. We will be using the official client libraries

produced by the Kubernetes project itself, though there are also a number of high-quality clients developed as independent projects. The client libraries are all hosted under the `kubernetes-client` repository on Github:

- Python
- Java
- Javascript
- .NET

Each of these projects features a compatibility matrix to show which versions of the client work with which versions of the Kubernetes API and also give instructions for installing the libraries using the package managers (e.g. `npm`) associated with a particular programming language.

## Authenticating to the Kubernetes API

The Kubernetes API server wouldn't be very safe if it allowed anyone in the world to access it and read or write the resources that it orchestrates. Consequently the first step in programming the Kubernetes API is connecting to it and identifying yourself for authentication. Because the API server is an HTTP server at its core, these methods of authentication are core HTTP authentication methods. The very first implementations of Kubernetes used basic HTTP authentication via a user and password combination, but this approach has been deprecated in favor of more modern authentication infrastructure.

If you have been using the `kubectl` command line tool for your interactions with Kubernetes, you may not have considered the implementation details of authentication. Fortunately the client libraries generally make it easy to connect to the API. However, a basic understanding of how Kubernetes authentication works is still useful for debugging when things go wrong.

There are two basic ways that the `kubectl` tool and clients obtain authentication information:

- \* From a “`kubeconfig`” file
- \* From the context of a Pod within the Kubernetes cluster.

Code that is not running inside a Kubernetes cluster requires a “kubeconfig” file to provide the necessary information for authentication. By default the client searches for this file in  `${HOME} / .kube/config` or the `$KUBECONFIG` environment variables. If the `KUBECONFIG` variable is present it takes precedence over any config located in the default home location. The kubeconfig file contains all of the information necessary to access the Kubernetes API server. The clients all have easy to use calls to create a client either from the default locations, or from a Kubeconfig file supplied in the code itself:

### *Java*

```
ApiClient client = Config.defaultClient();
Configuration.setDefaultApiClient(client);
```

### *Python*

```
config.load_kube_config()
```

### *.NET*

```
var config = KubernetesClientConfiguration.BuildDefaultConfig();
var client = new Kubernetes(config);
```

#### **NOTE**

Authentication for many cloud providers occurs via an external executable which knows how to generate a token for the Kubernetes cluster. This executable is often installed as part of the cloud providers command line tooling. When you write code to interact with the Kubernetes API, you need to make sure that this executable is also available in the context where the code is running so that it can be executed to obtain the token.

Within the context of a Pod in a Kubernetes cluster, the code running in the Pod has access to a Kubernetes service account which is associated with that Pod. The files containing the relevant token and certificate authority are placed into the Pod by Kubernetes as a volume when the Pod is created and

within a Kubernetes cluster, the api server is always available at a fixed DNS name, generally `kubernetes`. Because all of the necessary data is present in the Pod a `kubeconfig` file is unnecessary and the client can synthesize its configuration from its context. The clients all have easy to use calls to create such an “in cluster” client:

### *Java*

```
ApiClient client = ClientBuilder.cluster().build();
Configuration.setDefaultApiClient(client);
```

### *Python*

```
config.load_incluster_config()
```

### *.NET*

```
var config = KubernetesClientConfiguration.InClusterConfig();
var client = new Kubernetes(config);
```

#### **NOTE**

The default service account associated with Pods has minimal roles (RBAC) granted to it. This means that by default the code running in a Pod can’t do much with the Kubernetes API. If you are getting authorization errors you may need to adjust the service account to one that is specific to your code and has access to the necessary roles in the cluster.

## **Accessing the Kubernetes API**

The most common ways that people interact with the Kubernetes API is via basic operations like creating, listing and deleting resources. Because all of the clients are generated from the same OpenAPI specification they all follow the same rough pattern. Before diving into the code, there are a couple more details of the Kubernetes API that are necessary to understand.

The first is that in Kubernetes there is a distinction between “namespaced” and “cluster” level resources. *Namespaced* resources exist within a

Kubernetes namespace, for example a Pod or Deployment may exist in the `kube-system` namespace. *Cluster-level* resources exist once throughout the entire cluster. The most obvious example of such a resource is a Namespace, but other cluster-level resources include CustomResourceDefinitions and ClusterRoleBindings. This distinction is important because it is preserved in the function calls that you use to access the resources. For example, to list pods in the `default` namespace in Python you would write

```
api.list_namespaced_pods('default'). To list Namespaces you would write api.list_namespaces().
```

The second concept you need to understand is an *API group*. In Kubernetes all of the resources are grouped into different sets of APIs. This is largely hidden from users of the `kubectl` tool, though you may have seen it within the `apiVersion` field in a YAML specification of a Kubernetes object. When programming against the Kubernetes API this grouping becomes important, because often each API group has its own client for interacting with that set of resources. For example, create a client to interact with a Deployment resource (which exists in the “`apps/v1`” API group and version) you create a new `AppsV1Api()` object which knows how to interact with all resources in the `apps/v1` API group and version. An example of how to create a client for an API group is shown in the following section.

## Putting it all together: Listing & Creating Pods in Python, Java and .NET

We’re now ready to actually write some code. First we begin by creating a client object, then we use that to list the Pods in the “`default`” namespace, here is code to do that in Python, Java and .NET.

*Python*

```
config.load_kube_config()
api = client.CoreV1Api()
pod_list = api.list_namespaced_pod('default')
```

## *Java*

```
ApiClient client = Config.defaultClient();
Configuration.setDefaultApiClient(client);
CoreV1Api api = new CoreV1Api();
V1PodList list = api.listNamespacedPod("default");
```

## *.NET*

```
var config = KubernetesClientConfiguration.BuildDefaultConfig();
var client = new Kubernetes(config);
var list = client.ListNamespacedPod("default");
```

Once you have figured out how to list, read and delete objects, the next common task is creating new objects. The API call to create the object is easy enough to figure out (e.g. `create_namespaced_pod` in Python), but actually defining the new Pod resources can be more complicated.

Here's how you create a Pod in Python, Java and .NET:

## *Python*

```
container = client.V1Container(
    name="myapp",
    image="my_cool_image:v1",
)

pod = client.V1Pod(
    metadata = client.V1ObjectMeta(
        name="myapp",
    ),
    spec=client.V1PodSpec(containers=[container]),
)
```

## *Java*

```
V1Pod pod =
    new V1PodBuilder()
        .withNewMetadata().withName("myapp").endMetadata()
        .withNewSpec()
            .addNewContainer()
```

```

    .withName("myapp")
    .withImage("my_cool_image:v1")
    .endContainer()
.endSpec()
.build();

```

.NET

```

var pod = new V1Pod()
{
    Metadata = new V1ObjectMeta{ Name = "myapp", },
    Spec = new V1PodSpec
    {
        Containers = new[] { new V1Container() { Name = "myapp",
Image = "my_cool_image:v1", }, }, },
    };
}

```

## Creating & Patching objects

One thing that you will notice when you explore the client API for Kubernetes is that there are seemingly three different ways to manipulate resources, namely `create`, `replace` and `patch`. All three different verbs represent slightly different semantics for interacting with resources.

### *Create*

As you can tell from the name, creates a new resource. However, it will fail if the resource already exists.

### *Replace*

Replaces an existing resource completely, without looking at the existing resource. When you use `replace` you have to specify a complete resource.

### *Patch*

Modifies an existing resource leaving untouched parts of the resource the same as they were. When using `patch` you use a special patch

resource rather than sending the resource (e.g. the Pod) that you are modifying.

## NOTE

Patching a resource can be complicated. In many cases it is easier to just replace it. However, in some cases, especially with large resources, patching the resource can be much more efficient in terms of network bandwidth and API server processing. Additionally, multiple different actors can patch different parts of the resource simultaneously without worrying about write conflicts, which reduces overhead.

To patch a Kubernetes resource you have to create a Patch object representing the change that you want to make to the resource. There are three different formats for this patch supported by Kubernetes: “JSON patch”, “JSON merge patch” and “strategic merge patch”. The first two patch formats are RFC standards used in other places, the third is a Kubernetes developed patch format. Each of the patch formats has advantages and disadvantages. In these examples we will use JSON Patch because it is the simplest to understand.

Here’s how you patch a Deployment to increase the replicas to three:

*Java*

```
// JSON-patch format
static String jsonPatch =
  ""
[{"op": "replace", "path": "/spec/relicas", "value": 3}];

V1Deployment patched =
    PatchUtils.patch(
        V1Deployment.class,
        () ->
            api.patchNamespacedDeploymentCall(
                "my-deployment",
                "some-namespace",
                new V1Patch(jsonPatchStr),
                null,
                null,
                null,
```

```
        null,
        null),
V1Patch.PATCH_FORMAT_JSON_PATCH,
api.getApiClient());
```

## Python

```
deployment.spec.replicas = 3

api_response = api_instance.patch_namespaced_deployment(
    name="my-deployment",
    namespace="some-namespace",
    body=deployment)
```

## .NET

```
var jsonPatch = @""
[{
    ""op"": ""replace"",
    ""path"": ""/spec/replicas"",
    ""value"": 3
}];

client.PatchNamespacedPod(new V1Patch(patchStr,
V1Patch.PatchType.JsonPatch), "my-deployment", "some-namespace");
```

In each of these code samples, the Deployment resource has been patched to set the number of replicas in the deployment to three.

## Watching Kubernetes APIs for changes

Resources in Kubernetes are declarative. They represent the desired state of the system. To make that desired state a reality a program must watch the desired state for changes and take action to make the current state of the world match the desired state.

Because of this pattern, one of the most common tasks when programming against the Kubernetes API is to watch for changes to a resource and then take some action based on those changes. The easiest way to do this is through polling. *Polling* simply calls the list function described above at a

constant interval (such as every 60 seconds) and enumerates all of the resources that the code is interested in. While this code is easy to write, it has numerous drawbacks for both the client code and the API server.

Polling introduces unnecessary latency, since waiting for the polling cycle to come around introduces delays for changes that occur just after the previous poll completed. Additionally, polling causes heavier load on the API server, because it repeatedly returns resources that haven't changed. While many simple clients begin by using polling, too many clients polling the API server can overload it and add latency.

To solve this problem the Kuberentes API also provides “watch” or event-based semantics. Using a watch call, you can register interest in specific changes with the API server and instead of repeatedly polling, the API server will send notifications whenever a change occurs. In practice terms, the client performs a hanging GET to the HTTP API Server. The TCP connection that underlies this HTTP request stays open for the duration of the watch and the server writes a response to that stream (but does not close the stream) whenever a change occurs.

From a programmatic perspective, Watch semantics enable event-based programming, changing a while loop that repeatedly polls into a collection of callbacks. Here are examples of watching Pods for changes:

Java

```

        null,
        60,
        Boolean.TRUE);
new TypeToken<Watch.Response<V1Pod>>() {}.getType()));

try {
    for (Watch.Response<V1Pod> item : watch) {
        System.out.printf("%s : %s%n", item.type,
item.object.getMetadata().getName());
    }
} finally {
    watch.close();
}

```

## *Python*

```

config.load_kube_config()
api = client.CoreV1Api()
w = watch.Watch()

for event in w.stream(v1.list_namespaced_pods, "some-namespace"):
    print(event)

```

## *.NET*

```

var config =
KubernetesClientConfiguration.BuildConfigFromConfigFile();
var client = new Kubernetes(config);

var watch =
client.ListNamespacedPodWithHttpMessagesAsync("default", watch:
true);
using (watch.Watch<V1Pod, V1PodList>((type, item) =>
{
    Console.WriteLine(item);
})

```

In each of these examples, rather than a repetitive polling loop, the watch API call delivers each change to a resource to a callback provided by the user. This both reduces latency and load on the Kubernetes API server.

## Interacting with Pods

The Kubernetes API also provides functions for directly interacting with the applications running in a Kubernetes Pod. The `kubectl` tool provides a number of commands for interacting with Pods, namely `logs`, `exec` and `port-forward` and it is possible to use each of these from within custom code as well.

### NOTE

Because the `logs`, `exec` and `port-forward` APIs are non-standard in a RESTful sense, they require custom logic in the client libraries and are thus somewhat less consistent between the different clients. Unfortunately there is no option other than learning the implementation for each language.

When getting the logs for a Pod you have to decide if you are going to read the pod logs to get a snapshot of their current state or if you are going to stream them to receive new logs as they happen. If you stream the logs (the equivalent of `kubectl logs -f ...`) then you create an open connection to the API server and new log lines are written to this stream as they are written to the pod. If not, you simply receive the current contents of the logs.

Here's how you both read and stream the logs:

#### *Java*

```
V1Pod pod = ...; // some code to define or get a Pod here
PodLogs logs = new PodLogs();
InputStream is = logs.streamNamespacedPodLog(pod);
```

#### *Python*

```
config.load_kube_config()
api = client.CoreV1Api()
log = api_instance.read_namespaced_pod_log(name="my-pod",
namespace="some-namespace")
```

#### *.NET*

```
IKubernetes client = new Kubernetes(config);
var response = await
client.ReadNamespacedPodLogWithHttpMessagesAsync(
    "my-pod", "my-namespace", follow: true);
var stream = response.Body;
```

Another common task is to execute some command within a Pod and get the output of running that task. You can use the `kubectl exec ...` command on the command line. Under the hood the API that implements this is creating a WebSocket connection to the API server. WebSockets enable multiple streams of data (in this case `stdin`, `stdout` & `stderr`) to co-exist on the same HTTP connection. If you've never had experience with WebSockets before, don't worry, the details of interacting with WebSockets are handled by the client libraries.

Here's how you exec the `ls /foo` command in a Pod:

### *Java*

```
ApiClient client = Config.defaultClient();
Configuration.setDefaultApiClient(client);
Exec exec = new Exec();
final Process proc =
    exec.exec("some-namespace", "my-pod", new String[] {"ls",
"/foo"}, true, true /*tty*/);
```

### *Python*

```
cmd = [ 'ls', '/foo' ]
response = stream(
    api_instance.connect_get_namespaced_pod_exec,
    "my-pod",
    "some-namespace",
    command=cmd,
    stderr=True,
    stdin=False,
    stdout=True,
    tty=False)
```

### *.NET*

```

var config =
KubernetesClientConfiguration.BuildConfigFromConfigFile();
IKubernetes client = new Kubernetes(config);
var webSocket =
    await client.WebSocketNamespacedPodExecAsync("my-pod", "some-
namespace", "ls /foo", "my-container-name");
var demux = new StreamDemuxer(webSocket);
demux.Start();
var stream = demux.GetStream(1, 1);

```

In addition to running commands in a pod, you can also port-forward network connections from a Pod to code running on the local machine. Like exec, the port forwarded traffic goes over a WebSocket. It is up to your code what it does with this port forwarded socket. You could simply send a single request and receive a response as a string of bytes, or you could build a complete proxy server (like what `kubectl port-forward` does) to serve arbitrary requests through this proxy.

Regardless of what you intend to do with the connection, here's how you set up port-forwarding:

### *Java*

```

PortForward fwd = new PortForward();

List<Integer> ports = new ArrayList<>();
int localPort = 8080;
int targetPort = 8080;
ports.add(targetPort);
final PortForward.PortForwardResult result =
    fwd.forward("some-namespace", "my-pod", ports);

```

### *Python*

```

pf = portforward(
    api_instance.connect_get_namespaced_pod_portforward,
    'my-pod', 'some-namespace',
    ports='8080',
)

```

### *.NET*

```
var config =
KubernetesClientConfiguration.BuildConfigFromConfigFile();
IKubernetes client = new Kubernetes(config);
var webSocket = await
client.WebSocketNamespacedPodPortForwardAsync("some-namespace",
"my-pod", new int[] {8080}, "v4.channel.k8s.io");
var demux = new StreamDemuxer(webSocket, StreamType.PortForward);
demux.Start();
var stream = demux.GetStream((byte?)0, (byte?)0);
```

Each of these examples creates a connection for from port 8080 in a Pod to port 8080 in your program. The code returns the byte-streams necessary communicating across this port-forwarding channel. You can use these streams for sending and receiving messages.

## Conclusion

The Kubernetes API provides rich and powerful functionality for you to write custom code. Writing your applications in the language that best suits a task or a persona shares the power of the orchestration API with as many Kubernetes users as possible. When you're ready to move beyond scripting calls to the `kubectl` executable, the Kubernetes client libraries provide a way to dive deep into the API to build an operator, a monitoring agent, a new user interface or what ever your imagination can dream up.

# Chapter 14. Securing Pods

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## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the author’s raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 19th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

Providing a secure platform to run your workloads is critical for Kubernetes to be broadly used in production. Thankfully, Kubernetes ships with many different security focused APIs that allow you to construct a secure operating environment. The challenge being there are many different security APIs that you have to declaratively opt-in to using them. Using these different security focused APIs can be cumbersome and convoluted which makes it difficult to achieve your desired security goals. It’s important to understand the following concepts when working with securing Pods in Kubernetes, “defense in depth” and “principle of least privilege”. Defense in depth is a concept where you utilize multiple layers of security controls across your computing systems which include Kubernetes. The principle of least privilege means giving your workloads only access to resources that are required for it to operate. Both these concepts are not destinations but instead are constantly applied to the everchanging computing system landscape. In this chapter we will take a look at security focused Kubernetes APIs that can be incrementally applied to help secure your workloads at the Pod level.

# Understanding SecurityContext

At the core of securing Pods is `SecurityContext` which is an aggregation of all security focused fields that may be applied at both the Pod and container specification level. Here are some example security controls covered by `SecurityContext`:

- User permissions and access control. eg setting User ID and Group ID
- Read only root filesystem
- Allow privilege escalation
- Seccomp, AppArmor, and Selinux profile and label assignments
- Run as privileged or unprivileged

Let's take a look at an example Pod with a `SecurityContext` defined:

---

*Example 14-1. kuard-pod-securitycontext.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
spec:
  securityContext:
    runAsNonRoot: true
    runAsUser: 1000
    runAsGroup: 3000
    fsGroup: 2000
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      securityContext:
        allowPrivilegeEscalation: false
        readOnlyRootFilesystem: true
        privileged: false
      ports:
        - containerPort: 8080
          name: http
          protocol: TCP
```

You can see in the example above that there is a `SecurityContext` at both the Pod and the container level. Many of the security controls can be applied at both the Pod and the container levels. In the case that they are applied in both the container level configuration takes precedence. Let's take a look at fields we have defined in the Pod specification above and the impact they have on securing your workload:

- **runAsNonRoot** - The Pod or container must run as a non-root user. The container will fail to start if it is running as a root user. Running as a non-root user is considered best practice as many misconfigurations and exploits happen via the container runtime conflating the container process running as the root user with the host root user. This can be set at both the `PodSecurityContext` and the `SecurityContext`. The `kuard` container image is configured to run as user `nobody` as defined in the [Dockerfile](#). It's always best practice to run your container as a non root user however if you are running a container downloaded from another source that doesn't explicitly set the container user you may have to extend the original Dockerfile to do so. This method doesn't always work as the application may have other requirements that needs to be considered.
- **runAsUser/runAsGroup** - This setting overrides the user and group that the container process is run as. Container images may have this configured as part of the Dockerfile.
- **fsgroup** - Configures Kubernetes to change the group of all files in a volume when they are mounted into a Pod. An additional field `fsGroupChangePolicy` may be used to configure the exact behavior.
- **allowPrivilegeEscalation** - configures whether a process in a container can gain more privileges than it's parent. This is a common vector for attack and it's important to explicitly set this to false. It's also important to understand that this will be set to true if `privileged: true`.

- **privileged** - Runs the container as privileged which elevates the container to the same permissions as the host.
- **readOnlyRootFilesystem** - mounts the container root filesystem to ready-only. This is a common attack vector and is best practice to enable. Any data or logs that the workloads needs write access to can be mounted via a volume.

The fields in the above example aren't a complete list of all the security controls available however they represent a good starting point when working with `SecurityContext`. We will cover some more in context later in this chapter.

Let's now create the Pod by saving the example above to a file called `kuard-pod-securitycontext.yaml`. We will demonstrate how the `SecurityContext` configuration is being applied to a running Pod. Create the Pod using the following command:

```
$ kubectl create -f kuard-pod-securitycontext.yaml
pod/kuard created
```

Now we'll start a shell inside the `kuard` container and check which user ID and group ID the processes are running as.

```
$ kubectl exec -it kuard -- ash
/ $ id
uid=1000 gid=3000 groups=2000
/ $ ps
 PID  USER      TIME  COMMAND
   1  1000      0:00  /kuard
   30  1000      0:00  ash
   37  1000      0:00  ps
/ $ touch file
touch: file: Read-only file system
```

We can see that the shell that we started, `ash`, is running as user id (uid) 1000, group id (gid) 3000, and is in group 2000. We can also see that the `kuard` process is running as user 1000 as defined by the `SecurityContext` in the Pod specification. We also confirmed that we

aren't able to create any new files as the container is ready-only. If you only apply the following changes to your workloads you're already off to a great start.

We will now introduce several other security controls covered by `SecurityContext` that enable even more fine grained control over what access and privileges your workloads have. First we will introduce the operating system level security controls and then how to configure them via `SecurityContext`. It's important to note that many of these controls are host operating system dependent. This means that they may only apply to containers running on Linux operating systems as opposed to other supported Kubernetes operating systems like Windows. Here are a list of the core set of operating system controls that are covered by `SecurityContext`:

- **Capabilities** - Allow either the addition or removal of groups of privilege that may be required for a workload to operate. For example your workload may configure the hosts' network configuration. Rather than configuring the Pod to be privileged which is effectively host root access you could add the specific capability to configure the host networking configuration (`NET_ADMIN` is the specific capability name). This follows the principle of least privilege.
- **AppArmor** - controls which files processes can access. AppArmor profiles can be applied to containers via the addition of an annotation of  
`container.apparmor.security.beta.kubernetes.io/<container_name>: <profile_ref>` to the Pod specification. Acceptable values for the `<profile_ref>` include `runtime/default`, `localhost/<path_to_profile>`, or `unconfined`. The default is `unconfined` which explicitly sets no profile to be applied.
- **Seccomp** - Seccomp (Secure Computing) profiles allows the creation of syscall filters. These filters allow specific syscalls to be

allowed or blocked which limits the surface area of the Linux kernel that is exposed to the processes in the Pods.

- **SELinux** - defines access controls for files and processes. SELinux operators using labels that are grouped together to create a security context (Not to be mistaken with a Kubernetes SecurityContext) which is used to limit access to a process. By default, Kubernetes allocates a random SELinux context for each container however you may choose to set one via SecurityContext.

### NOTE

Both AppArmor and Seccomp have the ability to set the runtime default profile to be used. Each container runtime ships with a default AppArmor and Seccomp profile that has been carefully curated to reduce the attack surface area by removing syscalls and file access they are known to be attack vectors or aren't commonly used by applications. These defaults are rarely workload impacting and offer a great starting point.

In order to demonstrate how these security controls are applied to a Pod we are going to use a tool called **amicontained** “Am I contained” written by Jess Frazelle. Save the following Pod specification to a file called amicontained-pod.yaml. The first Pod has no SecurityContext applied and will be used to show the what security controls are applied to a Pod by default. Your output may look different as different Kubernetes distributions and managed services provide different defaults.

#### *Example 14-2. amicontained-pod.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: amicontained
spec:
  containers:
    - image: r.j3ss.co/amicontained:v0.4.9
      name: amicontained
      command: [ "/bin/sh", "-c", "--" ]
      args: [ "amicontained" ]
```

Create the amicontainer Pod.

```
$ kubectl apply -f amicontained-pod.yaml
pod/amicontained created
```

Let's review the Pod logs to examine the output of the amicontained tool.

```
$ kubectl logs amicontained
Container Runtime: kube
Has Namespaces:
  pid: true
  user: false
AppArmor Profile: docker-default (enforce)
Capabilities:
  BOUNDING -> chown dac_override fowner fsetid kill setgid
  setuid setpcap net_bind_service net_raw sys_chroot mknod
  audit_write setfcap
Seccomp: disabled
Blocked Syscalls (21):
  SYSLOG SETPGID SETSID Vhangup PIVOT_ROOT ACCT
  SETTIMEOFDAY Umount2 SWapon SWaPOFF REBOOT SETHOSTNAME
  SETDOMAINNAME INIT_MODULE DELETE_MODULE LOOKUP_DCOOKIE KEXEC_LOAD
  FANOTIFY_INIT OPEN_BY_HANDLE_AT FINIT_MODULE KEXEC_FILE_LOAD
Looking for Docker.sock
```

From the output above we see that the AppArmor runtime default is being applied. We also see the capabilities that are allowed by default along with Seccomp being disabled. Finally, we see that a total of 21 syscalls are being blocked by default. Now that we have a baseline, let's apply Seccomp, AppArmor, and Capabilities security controls to the Pod specification. Create a file called amicontained-pod-securitycontext.yaml with the following contents:

*Example 14-3. amicontained-pod-securitycontext.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: amicontained
  annotations:
    container.apparmor.security.beta.kubernetes.io/amicontained:
      "runtime/default"
spec:
```

```

securityContext:
  runAsNonRoot: true
  runAsUser: 1000
  runAsGroup: 3000
  fsGroup: 2000
  seccompProfile:
    type: RuntimeDefault
containers:
  - image: r.j3ss.co/amicontained:v0.4.9
    name: amicontained
    command: [ "/bin/sh", "-c", "--" ]
    args: [ "amicontained" ]
    securityContext:
      capabilities:
        add: [ "SYS_TIME" ]
        drop: [ "NET_BIND_SERVICE" ]
      allowPrivilegeEscalation: false
      readOnlyRootFilesystem: true
      privileged: false

```

First, we need to delete the existing amicontained Pod.

```

$ kubectl delete pod amicontained
pod "amicontained" deleted

```

Now we can create the new Pod with the SecurityContext applied. We are specifically declaring that the runtime default AppArmor and Seccomp profiles be applied. In addition, we have added and dropped a Capability.

```

$ kubectl apply -f amicontained-pod-securitycontext.yaml
pod/amicontained created

```

Let's again review the Pod logs to examine the output of the amicontained tool.

```

$ kubectl logs amicontained
Container Runtime: kube
Has Namespaces:
  pid: true
  user: false
AppArmor Profile: docker-default (enforce)
Capabilities:

```

```
        BOUNDING -> chown dac_override fowner fsetid kill setgid
setuid setpcap net_raw sys_chroot sys_time mknod audit_write
setfcap
Seccomp: filtering
Blocked Syscalls (67):
    SYSLOG SETUID SETGID SETPGID SETSID SETREUID SETREGID
SETGROUPS SETRESUID SETRESGID USELIB USTAT SYSFS VHANGUP
PIVOT_ROOT _SYSCTL ACCT SETTIMEofday MOUNT UMOUNT2 SWAPON SWAPOFF
REBOOT SETHOSTNAME SETDOMAINNAME IOPL IOPERM CREATE_MODULE
INIT_MODULE DELETE_MODULE GET_KERNEL_SYMS QUERY_MODULE QUOTACTL
NFSSERVCTL GETPMSG PUTPMSG AFS_SYSCALL TUXCALL SECURITY
LOOKUP_DCOOKIE VSERVER MBIND SET_MEMPOLICY GET_MEMPOLICY
KEXEC_LOAD ADD_KEY REQUEST_KEY KEYCTL MIGRATE_PAGES FUTIMESAT
UNSHARE MOVE_PAGES PERF_EVENT_OPEN FANOTIFY_INIT
NAME_TO_HANDLE_AT OPEN_BY_HANDLE_AT SETNS PROCESS_VM_READV
PROCESS_VM_WRITEV KCMP FINIT_MODULE KEXEC_FILE_LOAD BPF
USERFAULTFD PKEY_MPROTECT PKEY_ALLOC PKEY_FREE
Looking for Docker.sock
```

This time we can again confirm that the runtime default (called docker-default) AppArmor profile has been applied (same as the default). In the list of Capabilities we see that `net_bind_service` is no longer in the list and that `sys_time` has been added. The Seccomp status is now set to filtering and 67 syscalls are now being block (increased from the default of 21).

## SecurityContext Challenges

As you can see, you need to understand a lot of understanding needed in order to use `SecurityContext` and it is not easy to apply a baseline set of security controls by directly configuring all fields of every Pod. The creation and management of AppArmor, Seccomp, and SELinux profiles and contexts is no easy and is error prone. The cost of an error is breaking the ability for an application to perform its function. There are several tools out there which create a way to generate a Seccomp profile from a running Pod which can then be applied using `SecurityContext`. One such project is the [Security Profiles Operator](#) which makes it easy to generate and manage Seccomp profiles. We will now take a look at other security

APIs that make the management of how `SecurityContext` is applied consistently across a cluster.

## Pod Security Admission

Now that we've taken a look at `SecurityContext` as a way to manage security controls applied to Pods and containers, we will now cover how to make sure that a set of `SecurityContext` values are applied at scale. Kubernetes has a now deprecated Pod Security Policy (PSP) API which enabled both validation and mutation. Validation will not allow the creation of Kubernetes resources unless they have a specific `SecurityContext` applied. Mutation on the other hand will change Kubernetes resources and apply a specific `SecurityContext` based on criteria applied via the Pod Security Policy. Given that PSP is deprecated and will be removed in Kubernetes v1.25 we will not cover it in depth but will instead cover it's successor, Pod Security Admission. One of the main differences between Pod Security Admission and it's predecessor PSP is Pod Security Admission only performs validation and not mutation. If you want to learn more about mutation then we encourage you to take a look at chapter 21.

### What is Pod Security Admission?

Pod Security Admission allows you to declare different security profiles to Pods. These security profiles are known as Pod Security Standards and are applied at the namespace level. Pod Security Standards are a collection of security sensitive fields in a Pod specification (including but not limited to `SecurityContext`) and their associated values. There are three different standards that range from restricted to permissive. The idea is that you can apply a general security posture to all Pods in a given namespace. The three Pod Security Standards are as follows:

- **Baseline** - Most common privilege escalation while enabling easier onboarding.

- **Restricted** - Highly restricted covering security best practices.  
May cause workloads to break.
- **Privileged** - open and unrestricted.

*Example 14-4.*

---

Pod Security Admission is currently an alpha feature as of Kubernetes v1.22 and needs to be explicitly enabled on a Kubernetes cluster to use. Kubernetes features that are in alpha aren't typically enabled by public cloud managed Kubernetes offerings for stability reasons. You should consult your Kubernetes distribution or service providers' documentation to see if alpha features can be enabled. The API is also subject to change when the feature is in alpha so these commands may change but the concept the feature enables will be consistent.

Each Pod Security Standard defines a list of fields in the Pod specification and their allowed values. Here are some fields that are covered by these standards:

- `spec.securityContext`
- `spec.containers[*].securityContext`
- `spec.containers[*].ports`
- `spec.volumes[*].hostPath`

You can view the complete list of fields covered by each Pod Security Standard on the [official documentation](#).

Each standard is applied to a namespace using a given mode. There are three different modes a policy may be applied. They are as follows:

- **Enforce** - Any Pods that violate the policy will be denied
- **Warn** - Any Pods that violate the policy will be allowed and a warning message will be displayed to the user

- **Audit** - Any Pods that violate the policy will generate an audit message in the audit log

## Apply Pod Security Standards

Pod Security Standards are applied to a namespace using labels. The labels are as follows:

- `pod-security.kubernetes.io/<MODE>: <LEVEL>`  
REQUIRED
- `pod-security.kubernetes.io/<MODE>-version: <VERSION>` OPTIONAL (defaults to latest)

The following namespace illustrates how you may use multiple modes to enforce at one standard (baseline in this example) and audit and warn at another (restricted). Using multiple modes allows you to deploy a policy with a lower security posture and audit which workloads violate a standard with a more restricted policy. You can then remediate the policy violations before enforcing the more restricted standard. You can also pin a mode to a specific version eg. v1.22. This allows the policy standards to change with each Kubernetes release and allow you to pin a specific version. In the example below we are enforcing the baseline standard and both warning and auditing the restricted standard. All modes are pinned to the v1.22 version of the standard.

### *Example 14-5. baseline-ns.yaml*

---

```
apiVersion: v1
kind: Namespace
metadata:
  name: baseline-ns
  labels:
    pod-security.kubernetes.io/enforce: baseline
    pod-security.kubernetes.io/enforce-version: v1.22

    pod-security.kubernetes.io/audit: restricted
    pod-security.kubernetes.io/audit-version: v1.22
    pod-security.kubernetes.io/warn: restricted
    pod-security.kubernetes.io/warn-version: v1.22
```

Deploying policy for the first time can be a daunting task. Thankfully Pod Security Admission has made it easier to see which existing workloads violate a Pod Security Standard with a single dry-run command.

```
$ kubectl label --dry-run=server --overwrite ns --all pod-security.kubernetes.io/enforce=baseline
Warning: kuard: privileged
namespace/default labeled
namespace/kube-node-lease labeled
namespace/kube-public labeled
Warning: kube-proxy-vxjwb: host namespaces, hostPath volumes,
privileged
Warning: kube-proxy-zxqzz: host namespaces, hostPath volumes,
privileged
Warning: kube-apiserver-kind-control-plane: host namespaces,
hostPath volumes
Warning: etcd-kind-control-plane: host namespaces, hostPath
volumes
Warning: kube-controller-manager-kind-control-plane: host
namespaces, hostPath volumes
Warning: kube-scheduler-kind-control-plane: host namespaces,
hostPath volumes
namespace/kube-system labeled
namespace/local-path-storage labeled
```

The command above evaluates all Pods on a Kubernetes cluster against the baseline Pod Security Standard and reports violations as warning messages in the output.

Let's see Pod Security Admission in action. Create a file called `baseline-ns.yaml` with the following content.

*Example 14-6. `baseline-ns.yaml`*

---

```
apiVersion: v1
kind: Namespace
metadata:
  name: baseline-ns
  labels:
    pod-security.kubernetes.io/enforce: baseline
    pod-security.kubernetes.io/enforce-version: v1.22

    pod-security.kubernetes.io/audit: restricted
    pod-security.kubernetes.io/audit-version: v1.22
```

```
pod-security.kubernetes.io/warn: restricted
pod-security.kubernetes.io/warn-version: v1.22
```

```
$ kubectl apply -f baseline-ns.yaml
namespace/baseline-ns created
```

Create a file called kuard-pod.yaml with the following content:

---

*Example 14-7. kuard-pod.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
  labels:
    app: kuard
spec:
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      ports:
        - containerPort: 8080
          name: http
          protocol: TCP
```

Create the Pod and review the output with the following command:

```
$ kubectl apply -f kuard-pod.yaml --namespace baseline-ns
Warning: would violate "v1.22" version of "restricted"
PodSecurity profile: allowPrivilegeEscalation != false (container
"kuard" must set securityContext.allowPrivilegeEscalation=false),
unrestricted capabilities (container "kuard" must set
securityContext.capabilities.drop=["ALL"]),
runAsNonRoot != true
(pod or container "kuard" must set
securityContext.runAsNonRoot=true),
seccompProfile (pod or
container "kuard" must set securityContext.seccompProfile.type to
"RuntimeDefault" or "Localhost")
pod/kuard created
```

In the output above you can see that the pod was successfully created however it violated the restricted Pod Security Standard and the details of the violations are provided in the output so that you can remediate. We can also see the message in the api server audit log because we configured the audit mode

```
{"kind": "Event", "apiVersion": "audit.k8s.io/v1", "level": "Metadata",  
,"auditID": "b1950de2-a3c8-4454-bde8-  
269ee2692665", "stage": "ResponseComplete", "requestURI": "/api/v1/namespaces/baseline-ns/pods?fieldManager=kubectl-client-side-apply", "verb": "create", "user": {"username": "kubernetes-admin"}, "groups":  
["system:masters", "system:authenticated"]}, "sourceIPs":  
["172.18.0.1"], "userAgent": "kubectl/v1.22.1 (darwin/amd64)  
kubernetes/632ed30", "objectRef":  
{"resource": "pods", "namespace": "baseline-ns", "name": "kuard", "apiVersion": "v1"}, "responseStatus":  
{"metadata": {}, "code": 201}, "requestReceivedTimestamp": "2021-09-03T04:29:15.481133Z", "stageTimestamp": "2021-09-03T04:29:15.497475Z", "annotations":  
{"authorization.k8s.io/decision": "allow", "authorization.k8s.io/reason": "", "pod-security.kubernetes.io/audit": "allowPrivilegeEscalation != false  
(container \\"kuard\\" must set securityContext.allowPrivilegeEscalation=false), unrestricted capabilities  
(container \\"kuard\\" must set securityContext.capabilities.drop=[\\\"ALL\\\"]), runAsNonRoot != true  
(pod or container \\"kuard\\" must set securityContext.runAsNonRoot=true), seccompProfile  
(pod or container \\"kuard\\" must set securityContext.seccompProfile.type to \\"RuntimeDefault\\" or \\"Localhost\\""}}
```

Pod Security Admission is a great way to manage the security posture of your workloads by applying policy at the namespace level and only allowing Pods to be created if they don't violate the policy. It's flexible and offers different prebuilt policies from permissive to restricted along with tooling to easily rolling out policy changes without the risk of breaking workloads.

## Service Account Management

Service accounts are Kubernetes resources that provide an identity to workloads that run inside Pods. RBAC can be applied to service accounts to control what resources via the Kubernetes API the identity has access to. Please see the RBAC chapter to learn more. If your application doesn't require access to the Kubernetes API you should disable access following the least privilege principle. By default, Kubernetes creates a default service

account in each namespace which is automatically set as the service account for all Pods. This service account contains a token that is automounted in each Pod and is used to access the Kubernetes API. To disable this behavior, you must add `automountServiceAccountToken: false` to the service account configuration. [Example 14-8](#) demonstrates how this can be done for the default service account. This must be done in each namespace.

#### *Example 14-8. service-account.yaml*

---

```
apiVersion: v1
kind: ServiceAccount
metadata:
  name: default
automountServiceAccountToken: false
```

Service accounts are often overlooked when considering Pod security however they allow direct access to the Kubernetes API and without adequate RBAC could allow an attacker access to Kubernetes. It's important to understand how to limit access by making a simple change to how service accounts tokens are handled.

## Role Based Access Control

We would be remiss not to mention Kubernetes Role Based Access Control (RBAC) in a chapter about securing Pods. Everything you need to know about RBAC can be found in the RBAC chapter and can be applied to compliment your workload's security posture.

## RuntimeClass

Kubernetes interacts with the container runtime on the node's operating system via the Container Runtime Interface (CRI). The creation and standardization of this interface has allowed for an ecosystem of container runtimes to exist. These container runtimes may offer different levels of isolation which include stronger security guarantees based on how they are implemented. Projects like Kata containers, Firecracker, and gVisor are

based on different isolation mechanisms from nested virtualization to more sophisticated syscall filtering. These security and isolation guarantees provide a Kubernetes administrator the flexibility to allow users to select a container runtime based on their workload type. For example, if you workload needs stronger security guarantees then you can choose to run in a Pod that uses a different container runtime.

The RuntimeClass API was introduced to allow container runtime selection. It allows users to select one of a supported list of container runtimes in the cluster. [Figure 14-1](#) depicts how RuntimeClass functions

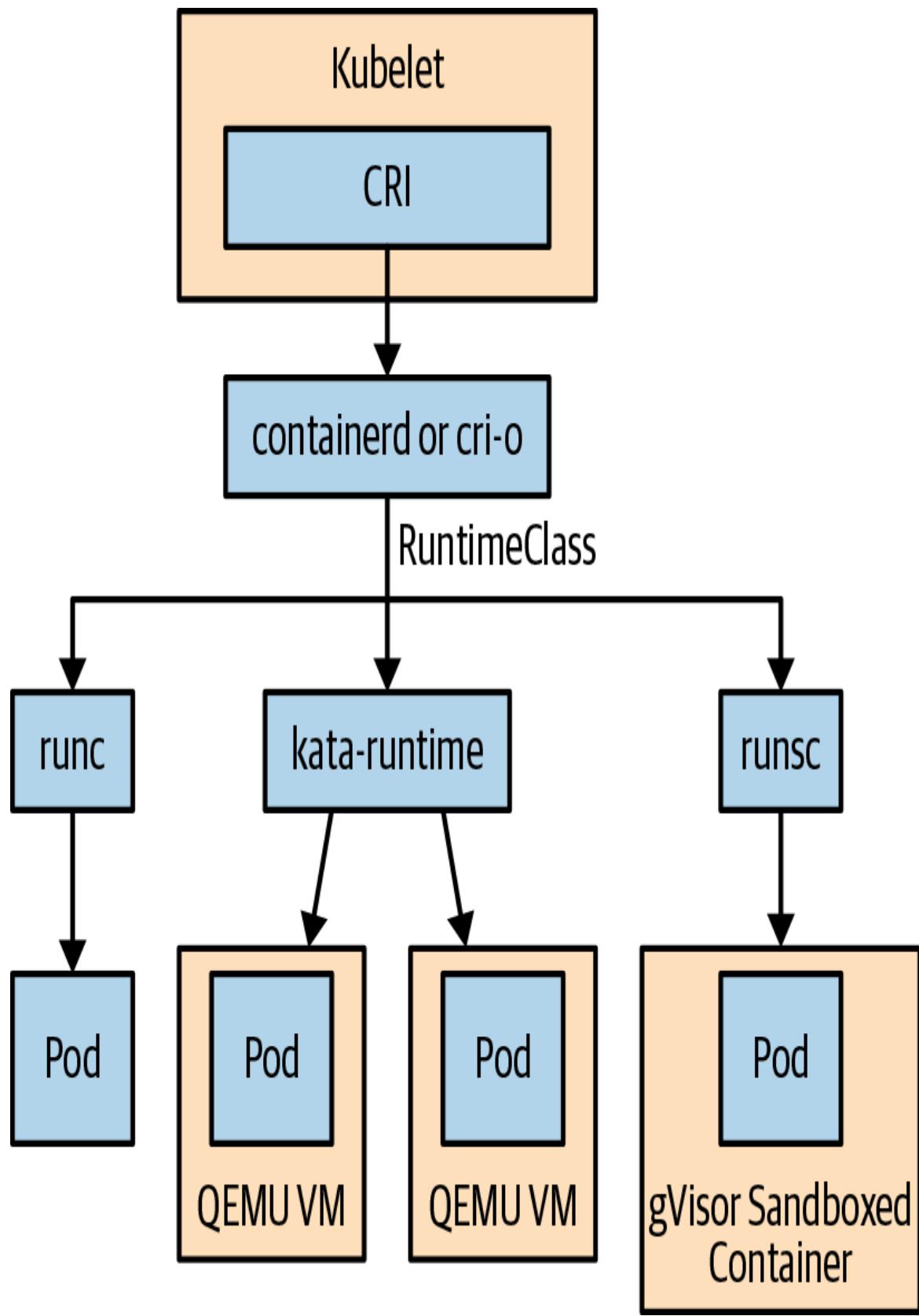


Figure 14-1. RuntimeClass flow diagram

## NOTE

Different RuntimeClass must be configured by a cluster administrator and may require specific nodeSelectors or tolerations on your workload in order to be scheduled to the correct node.

You can use a RuntimeClass by specifying runtimeClassName in the Pod specification. [Example 14-9](#) is an example Pod that specifies a RuntimeClass.

### *Example 14-9. kuard-pod-runtimeclass.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
  labels:
    app: kuard
spec:
  runtimeClassName: firecracker
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      ports:
        - containerPort: 8080
          name: http
          protocol: TCP
```

RuntimeClass allows users to select different container runtimes that may have different security isolation. Using RuntimeClass can help compliment the overall security of your workloads especially if workloads are processing sensitive information or run untrusted code.

## Network Policy

Kubernetes also has a NetworkPolicy API that allows you to create both ingress and egress network policies for your workload. Network policies are configured using labels which allow you to select specific Pods and define how they can communicate with other Pods and endpoints.

`NetworkPolicy` like `Ingress` doesn't actually ship with an associated Kubernetes controller. This means that you can create `NetworkPolicy` resources but if you haven't installed a controller that acts upon the creation of `NetworkPolicy` resources then they will not be enforced.

`NetworkPolicy` resources are implemented by network plugins. Some example network plugins include Calico, Cilium, and Weave Net.

The `NetworkPolicy` resource is namespaced and is structured with the `podSelector`, `policyTypes`, `ingress`, and `egress` sections with the only required field being `podSelector`. If the `podSelector` field is empty the policy matches all Pods in a namespace. This field may also contain a `matchLabels` section which functions the in the same way as a Service resource allowing you to add a set of labels to match a specific set of Pods.

There are several idiosyncrasies when using `NetworkPolicy` that you need to be aware of. If a Pod is matched by any `NetworkPolicy` resource then any ingress or egress communication must be explicitly defined, otherwise it will be blocked. If a Pod matches multiple `NetworkPolicy` resources then the policies are additive. If a Pod isn't matched by any `NetworkPolicy` then traffic is allowed. This decision was intentionally made to ease onboarding of new workloads. If you do however want all traffic to be blocked by default you can create a default deny rule per namespace. **Example 14-10** is an example default deny rule that can be applied per namespace.

---

*Example 14-10. `networkpolicy-default-deny.yaml`*

---

```
apiVersion: networking.k8s.io/v1
kind: NetworkPolicy
metadata:
  name: default-deny-ingress
spec:
  podSelector: {}
  policyTypes:
    - Ingress
```

The `ingress` and `egress` sections are a list of rules composed of `podSelectors`, `NamespaceSelectors`, network address ranges, port

ranges, and protocols which allow you to filter the source (for ingress) or destination (for egress) you want to allow. If these sections are explicitly defined then it's a default deny. The `policyTypes` field connects which direction `ingress` or `egress` to apply the rules. There is some defaulting if this is left blank however we suggest being explicit so that the behavior is predictable and is in line with declarative configuration.

Let's walk through an example set of network policies to demonstrate how you can use them to secure your workloads. First, create a namespace to test using the following command:

```
$ kubectl create ns kuard-networkpolicy
namespace/kuard-networkpolicy created
```

Create a file named `kuard-pod.yaml` with the following contents:

*Example 14-11. kuard-pod.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
  labels:
    app: kuard
spec:
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      ports:
        - containerPort: 8080
          name: http
          protocol: TCP
```

Create the `kuard` Pod in the `kuard-networkpolicy` namespace.

```
$ kubectl apply -f kuard-pod.yaml --namespace kuard-networkpolicy
pod/kuard created
```

Expose the `kuard` Pod as a service.

```
$ kubectl expose pod kuard --port=80 --target-port=8080 --
namespace kuard-networkpolicy
```

```
pod/kuard created
```

Now we can use kubectl run to spin up a Pod to test as our source and test access to the kuard Pod without applying any NetworkPolicy.

```
$ kubectl run test-source --rm -ti --image busybox /bin/sh --  
namespace kuard-networkpolicy  
If you don't see a command prompt, try pressing enter.  
/ # wget -q kuard -O -  
<!doctype html>  
  
<html lang="en">  
<head>  
  <meta charset="utf-8">  
  
  <title><KUAR Demo></title>  
...
```

We can successfully connect to the kuard Pod from our test-source Pod. Now let's apply a default deny policy and test again. Create a file called networkpolicy-default-deny.yaml with the following contents.

*Example 14-12. networkpolicy-default-deny.yaml*

---

```
apiVersion: networking.k8s.io/v1  
kind: NetworkPolicy  
metadata:  
  name: default-deny-ingress  
spec:  
  podSelector: {}  
  policyTypes:  
  - Ingress
```

Now apply the default deny network policy.

```
$ kubectl apply -f networkpolicy-default-deny.yaml --namespace  
kuard-networkpolicy  
networkpolicy.networking.k8s.io/default-deny-ingress created
```

Now let's test access to the kuard Pod from the test-source Pod.

```
$ kubectl run test-source --rm -ti --image busybox /bin/sh --  
namespace kuard-networkpolicy
```

```
If you don't see a command prompt, try pressing enter.  
/ # wget -q --timeout=5 kuard -O -  
wget: download timed out
```

We can no longer access the kuard pod from the test-source Pod due to the default deny NetworkPolicy. Create a NetworkPolicy that allows access from the test-source to the kuard Pod. Create a file called networkpolicy-kuard-allow-test-source.yaml with the following contents.

*Example 14-13. networkpolicy-kuard-allow-test-source.yaml*

---

```
kind: NetworkPolicy  
apiVersion: networking.k8s.io/v1  
metadata:  
  name: access-kuard  
spec:  
  podSelector:  
    matchLabels:  
      app: kuard  
  ingress:  
  - from:  
    - podSelector:  
      matchLabels:  
        run: test-source
```

Apply the NetworkPolicy.

```
$ kubectl apply -f code/chapter-security/networkpolicy-kuard-  
allow-test-source.yaml --namespace kuard-networkpolicy  
networkpolicy.networking.k8s.io/access-kuard created
```

Again, verify that the test-source Pod can indeed access the kuard Pod.

```
$ kubectl run test-source --rm -ti --image busybox /bin/sh --  
namespace kuard-networkpolicy  
If you don't see a command prompt, try pressing enter.  
/ # wget -q kuard -O -  
<!doctype html>  
  
<html lang="en">  
<head>  
  <meta charset="utf-8">
```

```
<title><KUAR Demo></title>
...

```

Clean up the namespace by running the following command.

```
$ kubectl delete namespace kuard-networkpolicy
namespace "kuard-networkpolicy" deleted
```

Applying NetworkPolicy provides and extra layer of security for your workloads and continues to build on the defense in depth and principle of least privilege concepts.

## Service Mesh

Service Mesh can also be used to increase your workloads security posture. Service meshes offer both access policies which allow the configuration of protocol aware policies based on services. For example, your access policy might declare that ServiceA connects to ServiceB via HTTPS on port 443. In addition, service meshes typically implement mutual TLS on all service to service communication which means that not only is the communication encrypted but the service identities are also verified. If you would like to learn more about service meshes and how they can be used to secure your workloads please checkout the Service Mesh chapter.

## Security Benchmark tools

There are several open source tools that allow you to run a suite of security benchmarks against your Kubernetes cluster to determine if your configuration meets a predefined set of security baselines. Once such tool is called **kube-bench**. Kube-bench can be used to run the **CIS Benchmarks** for Kubernetes. Tools like Kube-bench running the CIS Benchmarks aren't specifically focused on Pod security however they can certainly expose any cluster misconfigurations and help identify remediations. Kube-bench can be run using the following command:

```
$ kubectl apply -f  
https://raw.githubusercontent.com/aquasecurity/kube-  
bench/main/job.yaml  
job.batch/kube-bench created
```

You can then review the benchmark output and remediations via the Pod logs.

```
$ kubectl logs job/kube-bench  
[INFO] 4 Worker Node Security Configuration  
[INFO] 4.1 Worker Node Configuration Files  
[PASS] 4.1.1 Ensure that the kubelet service file permissions are  
set to 644 or more restrictive (Automated)  
[PASS] 4.1.2 Ensure that the kubelet service file ownership is  
set to root:root (Automated)  
[PASS] 4.1.3 If proxy kubeconfig file exists ensure permissions  
are set to 644 or more restrictive (Manual)  
[PASS] 4.1.4 Ensure that the proxy kubeconfig file ownership is  
set to root:root (Manual)  
[PASS] 4.1.5 Ensure that the --kubeconfig kubelet.conf file  
permissions are set to 644 or more restrictive (Automated)  
[PASS] 4.1.6 Ensure that the --kubeconfig kubelet.conf file  
ownership is set to root:root (Manual)  
[PASS] 4.1.7 Ensure that the certificate authorities file  
permissions are set to 644 or more restrictive (Manual)  
[PASS] 4.1.8 Ensure that the client certificate authorities file  
ownership is set to root:root (Manual)  
[PASS] 4.1.9 Ensure that the kubelet --config configuration file  
has permissions set to 644 or more restrictive (Automated)  
[PASS] 4.1.10 Ensure that the kubelet --config configuration file  
ownership is set to root:root (Automated)  
[INFO] 4.2 Kubelet  
[PASS] 4.2.1 Ensure that the anonymous-auth argument is set to  
false (Automated)  
[PASS] 4.2.2 Ensure that the --authorization-mode argument is not  
set to AlwaysAllow (Automated)  
[PASS] 4.2.3 Ensure that the --client-ca-file argument is set as  
appropriate (Automated)  
[PASS] 4.2.4 Ensure that the --read-only-port argument is set to  
0 (Manual)  
[PASS] 4.2.5 Ensure that the --streaming-connection-idle-timeout  
argument is not set to 0 (Manual)  
[FAIL] 4.2.6 Ensure that the --protect-kernel-defaults argument  
is set to true (Automated)  
[PASS] 4.2.7 Ensure that the --make-iptables-util-chains argument  
is set to true (Automated)
```

```
[PASS] 4.2.8 Ensure that the --hostname-override argument is not set (Manual)
[WARN] 4.2.9 Ensure that the --event-qps argument is set to 0 or a level which ensures appropriate event capture (Manual)
[WARN] 4.2.10 Ensure that the --tls-cert-file and --tls-private-key-file arguments are set as appropriate (Manual)
[PASS] 4.2.11 Ensure that the --rotate-certificates argument is not set to false (Manual)
[PASS] 4.2.12 Verify that the RotateKubeletServerCertificate argument is set to true (Manual)
[WARN] 4.2.13 Ensure that the Kubelet only makes use of Strong Cryptographic Ciphers (Manual)

== Remediations node ==
4.2.6 If using a Kubelet config file, edit the file to set protectKernelDefaults: true.
If using command line arguments, edit the kubelet service file /etc/systemd/system/kubelet.service.d/10-kubeadm.conf on each worker node and
set the below parameter in KUBELET_SYSTEM_PODS_ARGS variable.
--protect-kernel-defaults=true
Based on your system, restart the kubelet service. For example:
systemctl daemon-reload
systemctl restart kubelet.service

4.2.9 If using a Kubelet config file, edit the file to set eventRecordQPS: to an appropriate level.
If using command line arguments, edit the kubelet service file /etc/systemd/system/kubelet.service.d/10-kubeadm.conf on each worker node and
set the below parameter in KUBELET_SYSTEM_PODS_ARGS variable.
Based on your system, restart the kubelet service. For example:
systemctl daemon-reload
systemctl restart kubelet.service
...
```

Using tools like Kube-bench with the CIS benchmarks can help identify if your Kubernetes cluster meets a security baseline and provide remediations if needed.

## Summary

In this chapter we covered many different security focused APIs and resources that can be composed to improve the security posture of your

workloads. By practicing defense in depth and principle of least privilege you can incrementally improve the baseline security of your Kubernetes cluster. It's never too late to start practicing better security and this chapter provides everything you need to be confident that you have an understanding of the security controls Kubernetes offers.

# Chapter 15. Policy and Governance for Kubernetes Clusters

---

## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the authors’ raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 20th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

Throughout this book we have introduced many different Kubernetes resource types, each with a specific purpose. It doesn’t take long before the resources on a Kubernetes cluster go from several, for a single microservice application, to hundreds and thousands, for a complete distributed application. In the context of a production cluster it isn’t hard to imagine the challenges associated with managing thousands of resources.

In this chapter we introduce the concepts of policy and governance. Policy is a set of constraints and conditions for how Kubernetes resources can be configured. Governance provides the ability to verify and enforce organizational policies for all resources deployed to a Kubernetes cluster, such as ensuring all resources utilize current best practices, comply with security policy, or adhere to company conventions. Whatever your case may

be, your tooling needs to be flexible and scalable so that all resources defined on a cluster comply with your organization's defined policies.

## Why Policy and Governance Matter

There are many different types of policies in Kubernetes. For example, `NetworkPolicy` allows you to specify what network services and endpoints a Pod can connect to. `PodSecurityPolicy` enables fine-grained control over the security elements of a Pod. Both configure network or container runtime.

However, you might even want to enforce policy before Kubernetes resources are even created. This is the problem policy and governance solve. At this point, you might be thinking, “Isn’t this what Role-Based Access Control does?”. However, as you’ll see in this chapter, RBAC isn’t granular enough to restrict specific fields within resources from being set.

Here are some common examples of policies that cluster administrators often configure:

- All containers MUST only come from a specific container registry.
- All Pods MUST be labelled with the department name and contact information.
- All Pods MUST have both CPU and memory resource limits set.
- All Ingress hostnames must be unique across a cluster.
- A certain service MUST not be made available on the Internet.
- Containers MUST not listen on privileged ports.

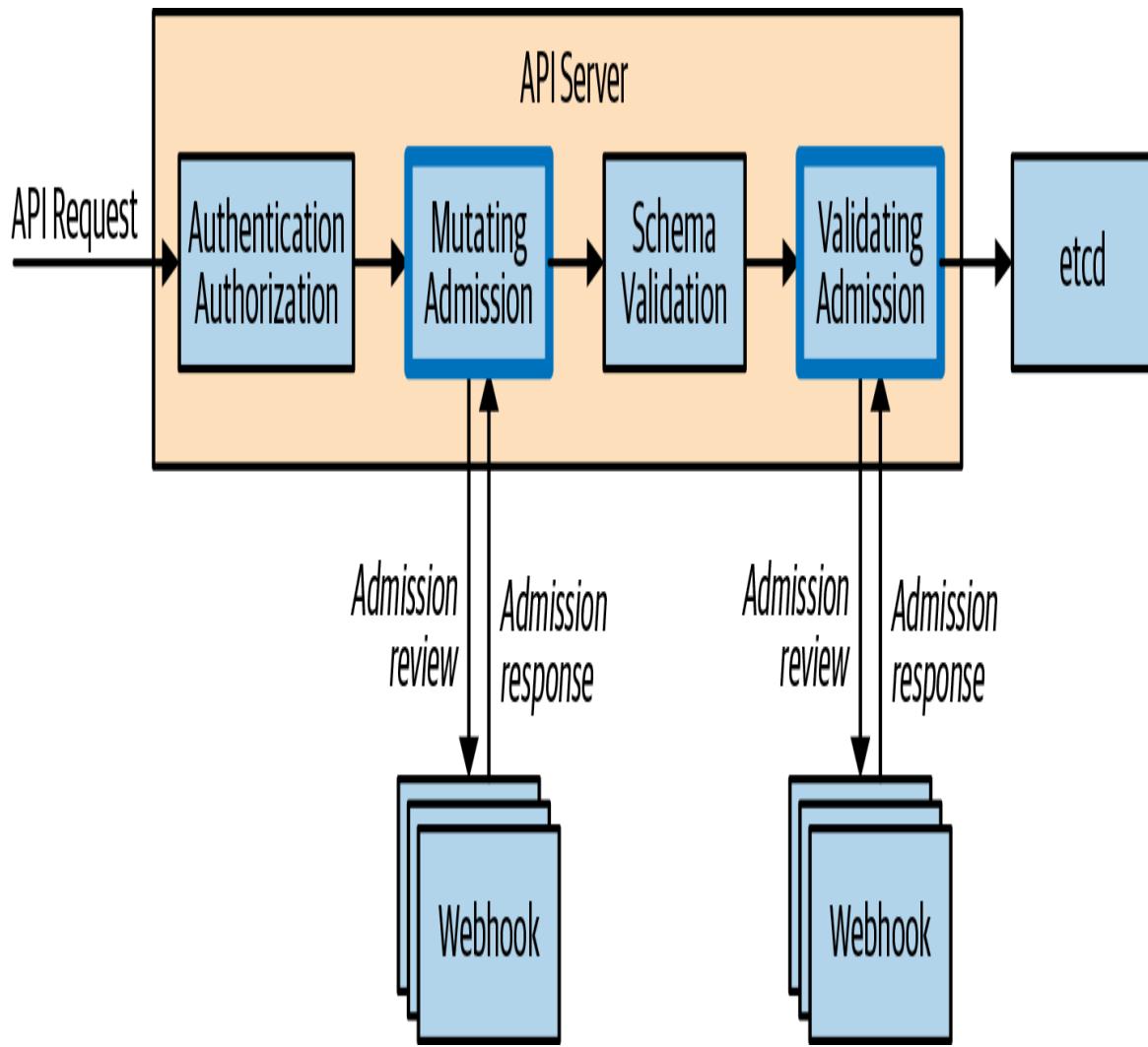
Cluster administrators may also want to audit existing resources on a cluster, perform dry-run policy evaluations, or even mutate a resource based on a set of conditions --for example, applying labels to a Pod if they aren’t present.

It's very important for cluster administrators to be able to define policy and perform compliance audits without interfering with the developers' ability to deploy applications to Kubernetes. If developers are creating non compliant resources, you need a system to make sure they get the feedback and remediation they need to bring their work into compliance.

Let's take a look at how to achieve policy and governance by leveraging core extensibility components of Kubernetes.

## Admission Flow

To understand how policy and governance ensures resources are compliant before they are created in your Kubernetes cluster, you must first understand the request flow through the Kubernetes API server. [Figure 15-1](#) depicts the flow of an API request through the API server. Here, we'll focus on mutating admission, validating admission, and webhooks.



*Figure 15-1. API Request flow through the Kuberentes API*

Admission controllers operate inline as an API request flows through the Kubernetes API server and are used to either mutate or validate the API request resource before it's saved to storage. Mutating admission controllers allow the resource to be modified; validating admission controllers do not. There are many different types of admission controllers; this chapter focuses on admission webhooks, which are dynamically configurable. They allow a cluster administrator to configure an endpoint for the API server to send requests for evaluation by creating either a `MutatingWebhookConfiguration` or `ValidatingWebhookConfiguration` resource. The admission

webhook will respond with an “admit” or “deny” directive to let the API server know whether to save the resource to storage.

## Policy and Governance with Gatekeeper

Let’s dive into how to configure policies and ensure that Kubernetes resources are compliant. The Kubernetes project doesn’t provide any controllers that enable policy and governance, but there are open-source solutions. Here, we will focus on a open source ecosystem project called [Gatekeeper](#).

Gatekeeper is a Kubernetes-native policy controller that evaluates resources based on defined policy and determines whether to whether to allow a Kubernetes resource to be created or modified. These evaluations happen server-side as the API request flows through the Kubernetes API server, which means each cluster has a single point of processing. Processing the policy evaluations server-side means that you can install Gatekeeper on existing Kubernetes clusters without changing developer tooling, workflows, or continuous delivery pipelines.

Gatekeeper uses *custom resource definitions* (CRDs) to define a new set of Kubernetes resources specific to configuring it, which allows cluster administrators to use familiar tools like kubectl to operate Gatekeeper. In addition, it provides real-team meaningful feedback to the user on why a resource was denied and how to remediate the problem. These Gatekeeper-specific custom resources can be stored in source control and managed using GitOps workflows.

Gatekeeper also performs *resource mutation* (resource modification based on defined conditions) and auditing. It is highly configurable and offers fine-grained control over what resources to evaluate and in which namespaces.

## What is Open Policy Agent?

At the core of Gatekeeper is [Open Policy Agent](#), a cloud native open source policy engine that is extensible and allows policy to be portable across different applications. Open Policy Agent is responsible for performing all policy evaluations and returning either an admit or deny. This gives Gatekeeper access to an ecosystem of policy tooling: for example, [confest](#), which enables you to write policy tests and implement them in continuous integration pipelines before deployment.

Open Policy Agent exclusively uses a native query language called [Rego](#) for all policies. One of the core tenets of Gatekeeper is to abstract the inner workings of Rego from the cluster administrator and present a structured API in the form of a Kubernetes CRD to create and apply policy. This lets you share parameterized policies across organizations and the community. The Gatekeeper project maintains a policy library solely for this purpose (discussed later in this chapter).

## Installing Gatekeeper

Before you start configuring policies, you'll need to install Gatekeeper. Gatekeeper components run as Pods in the `gatekeeper-system` namespace and configures a webhook admission controller.

### WARNING

Do not install Gatekeeper on a Kubernetes cluster without first understanding how to safely create and disable policy. You should also review the installation YAML before installing Gatekeeper to ensure that you are comfortable with the resources it creates.

You can install Gatekeeper with a simple one-line invocation:

```
$ kubectl apply -f https://raw.githubusercontent.com/open-policy-agent/gatekeeper/release-3.5/deploy/gatekeeper.yaml
namespace/gatekeeper-system created
resourcequota/gatekeeper-critical-pods created
customresourcedefinition.apiextensions.k8s.io/configs.config.gatekeeper.sh created
customresourcedefinition.apiextensions.k8s.io/constraintpodstatus
```

```
es.status.gatekeeper.sh created
customresourcedefinition.apiextensions.k8s.io/constrainttemplatep
odstatuses.status.gatekeeper.sh created
customresourcedefinition.apiextensions.k8s.io/constrainttemplates
.templates.gatekeeper.sh created
serviceaccount/gatekeeper-admin created
Warning: policy/v1beta1 PodSecurityPolicy is deprecated in
v1.21+, unavailable in v1.25+
podsecuritypolicy.policy/gatekeeper-admin created
role.rbac.authorization.k8s.io/gatekeeper-manager-role created
clusterrole.rbac.authorization.k8s.io/gatekeeper-manager-role
created
rolebinding.rbac.authorization.k8s.io/gatekeeper-manager-
rolebinding created
clusterrolebinding.rbac.authorization.k8s.io/gatekeeper-manager-
rolebinding created
secret/gatekeeper-webhook-server-cert created
service/gatekeeper-webhook-service created
deployment.apps/gatekeeper-audit created
deployment.apps/gatekeeper-controller-manager created
Warning: policy/v1beta1 PodDisruptionBudget is deprecated in
v1.21+, unavailable in v1.25+; use policy/v1 PodDisruptionBudget
poddisruptionbudget.policy/gatekeeper-controller-manager created
validatingwebhookconfiguration.admissionregistration.k8s.io/gatek
eepер-validating-webhook-configuration created
```

## NOTE

Gatekeeper installation requires cluster-admin permissions and is version specific.  
Please refer to the official documentation for the latest release of [Gatekeeper](#)

Once the installation is complete, confirm that Gatekeeper is up and running:

```
$ kubectl get pods -n gatekeeper-system
NAME                               READY   STATUS
RESTARTS   AGE
gatekeeper-audit-54c9759898-ljwp8      1/1    Running
0          1m
gatekeeper-controller-manager-6bcc7f8fb5-4nbkt   1/1    Running
0          1m
gatekeeper-controller-manager-6bcc7f8fb5-d85rn   1/1    Running
0          1m
```

```
gatekeeper-controller-manager-6bcc7f8fb5-f8m8j      1/1      Running
0          1m
```

You can also review how the webhook is configured using the command below:

```
$ kubectl get validatingwebhookconfiguration -o yaml
apiVersion: admissionregistration.k8s.io/v1
kind: ValidatingWebhookConfiguration
metadata:
  labels:
    gatekeeper.sh/system: "yes"
  name: gatekeeper-validating-webhook-configuration
webhooks:
- admissionReviewVersions:
  - v1
  - v1beta1
  clientConfig:
    service:
      name: gatekeeper-webhook-service
      namespace: gatekeeper-system
      path: /v1/admit
    failurePolicy: Ignore
    matchPolicy: Exact
    name: validation.gatekeeper.sh
    namespaceSelector:
      matchExpressions:
      - key: admission.gatekeeper.sh/ignore
        operator: DoesNotExist
  rules:
- apiGroups:
  - '*'
  apiVersions:
  - '*'
  operations:
  - CREATE
  - UPDATE
  resources:
  - '*'
  sideEffects: None
  timeoutSeconds: 3
  ....
```

Under the `rules` section of the output above, we see that all resources are being sent to the webhook admission controller, running as a service named

`gatekeeper-webhook-service` in the `gatekeeper-system` namespace. Only resources from namespaces that aren't labelled `admission.gatekeeper.sh/ignore` will be considered for policy evaluation. Finally, the `failurePolicy` is set to `Ignore` which means that this is a *fail open configuration*: if the Gatekeeper service doesn't respond within the configured timeout of 3 seconds, the request will be admitted.

## Configuring policies

Now that you have Gatekeeper installed, you can start configuring policies. We will first go through a canonical example and demonstrate how the cluster administrator creates policies. Then we'll look at the developer experience when creating compliant and non compliant resources. We will then expand on each step to gain a deeper understanding. We'll walk you through the process of creating a sample policy stating that container images can only come from one specific registry. This example is based on the [Gatekeeper policy library](#).

First, you'll need to configure the policy we first need to create a custom resource called a *constraint template*. This is usually done by a cluster administrator. The constraint template in [Example 15-1](#) requires you to provide a list of container repositories as parameters that Kubernetes resources are allowed to use.

### Example 15-1. `allowedrepos-constraint-template.yaml`

---

```
apiVersion: templates.gatekeeper.sh/v1beta1
kind: ConstraintTemplate
metadata:
  name: k8sallowedrepos
  annotations:
    description: Requires container images to begin with a repo
string from a specified
list.
spec:
  crd:
    spec:
      names:
        kind: K8sAllowedRepos
```

```

validation:
  # Schema for the `parameters` field
openAPIV3Schema:
  properties:
    repos:
      type: array
      items:
        type: string
targets:
  - target: admission.k8s.gatekeeper.sh
    rego: |
      package k8sallowedrepos

      violation[{"msg": msg}] {
        container := input.review.object.spec.containers[_]
        satisfied := [good | repo = input.parameters.repos[_] ;
good = startswith(container.image, repo)]
        not any(satisfied)
        msg := sprintf("container <%v> has an invalid image repo
<%v>, allowed repos are %v", [container.name, container.image,
input.parameters.repos])
      }

      violation[{"msg": msg}] {
        container := input.review.object.spec.initContainers[_]
        satisfied := [good | repo = input.parameters.repos[_] ;
good = startswith(container.image, repo)]
        not any(satisfied)
        msg := sprintf("container <%v> has an invalid image repo
<%v>, allowed repos are %v", [container.name, container.image,
input.parameters.repos])
      }

```

Create the constraint template using the following command:

```

$ kubectl apply -f allowedrepos-constraint-template.yaml
constrainttemplate.templates.gatekeeper.sh/k8sallowedrepos
created

```

Now you can create a constraint resource to put the policy into effect (again, playing the role of the cluster administrator). The constraint in **Example 15-2** allows all containers with the prefix of gcr.io/kuar-demo/ in the default namespace. The enforcementAction is set to “deny”: any noncompliant resources will be denied.

---

*Example 15-2. allowedrepos-constraint.yaml*

---

```
apiVersion: constraints.gatekeeper.sh/v1beta1
kind: K8sAllowedRepos
metadata:
  name: repo-is-kuar-demo
spec:
  enforcementAction: deny
  match:
    kinds:
      - apiGroups: [""]
        kinds: ["Pod"]
    namespaces:
      - "default"
  parameters:
    repos:
      - "gcr.io/kuar-demo/"
```

```
$ kubectl create -f allowedrepos-constraint.yaml
k8sallowedrepos.constraints.gatekeeper.sh/repo-is-kuar-demo
created
```

The next step is to create some Pods to test that the policy is indeed working. [Example 15-3](#) creates a Pod using a container image, `gcr.io/kuar-demo/kuard-amd64:blue`, that complies with the constraint we defined in the previous step. Workload resource creation is typically performed by the developer responsible for operating the service or a continuous delivery pipeline.

---

*Example 15-3. compliant-pod.yaml.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: kuard
spec:
  containers:
    - image: gcr.io/kuar-demo/kuard-amd64:blue
      name: kuard
      ports:
        - containerPort: 8080
          name: http
          protocol: TCP
```

```
$ kubectl apply -f compliant-pod.yaml
pod/kuard created
```

What happens if we create a noncompliant Pod? [Example 15-4](#) creates a Pod using a container image, `nginx`, that is NOT compliant with the constraint we defined in the previous step and will be created. Workload resource creation would typically be performed by the developer or continuous delivery pipeline responsible for operating the service. Note the output below:

*Example 15-4. noncompliant-pod.yaml.yaml*

---

```
apiVersion: v1
kind: Pod
metadata:
  name: nginx-noncompliant
spec:
  containers:
    - name: nginx
      image: nginx
```

```
$ kubectl apply -f noncompliant-pod.yaml
Error from server ([repo-is-kuar-demo] container <nginx> has an
invalid image repo <nginx>, allowed repos are ["gcr.io/kuar-
demo/"]): error when creating "noncompliant-pod.yaml": admission
webhook "validation.gatekeeper.sh" denied the request: [repo-is-
kuar-demo] container <nginx> has an invalid image repo <nginx>,
allowed repos are ["gcr.io/kuar-demo/"]
```

[Example 15-4](#) show that this returns an error is returned the user with details on why the resource was not created and how to remediate the issue. Cluster administrators can configure the error message in the constraint template.

### NOTE

If your constraint's scope is Pods and you create a resource that generates Pods, such as ReplicaSets, Gatekeeper will return an error. However, it won't be returned to you, the user, but to the controller trying to create the Pod. To see these error messages, look in the event log for the relevant resource

## Understanding Constraint Templates

Now that we have walked through a canonical example, let's take a closer look at the constraint template in [Example 15-5](#) which takes a list of container repositories that are allowed in Kubernetes resources.

*Example 15-5. allowedrepos-constraint-template.yaml*

---

```
apiVersion: templates.gatekeeper.sh/v1beta1
kind: ConstraintTemplate
metadata:
  name: k8sallowedrepos
  annotations:
    description: Requires container images to begin with a repo
      string from a specified
      list.
spec:
  crd:
    spec:
      names:
        kind: K8sAllowedRepos
      validation:
        # Schema for the `parameters` field
        openAPIV3Schema:
          properties:
            repos:
              type: array
              items:
                type: string
      targets:
        - target: admission.k8s.gatekeeper.sh
          rego: |
            package k8sallowedrepos

            violation[{"msg": msg}] {
              container := input.review.object.spec.containers[_]
              satisfied := [good | repo = input.parameters.repos[_] ;
                good = startswith(container.image, repo)]
              not any(satisfied)
              msg := sprintf("container <%v> has an invalid image repo
                <%v>, allowed repos are %v", [container.name, container.image,
                input.parameters.repos])
            }

            violation[{"msg": msg}] {
              container := input.review.object.spec.initContainers[_]
              satisfied := [good | repo = input.parameters.repos[_] ;
```

```

good = startswith(container.image, repo) ]
    not any(satisfied)
    msg := sprintf("container <%v> has an invalid image repo
<%v>, allowed repos are %v", [container.name, container.image,
input.parameters.repos])
}

```

This constraint template has an `apiVersion` and `kind` that are part of the custom resources used only by Gatekeeper. Under the `spec` section, you'll see the name `K8sAllowedRepos`: remember that name, because you'll use it as the constraint kind when creating constraints. You'll also see a schema that defines an array of strings for the cluster administrator to configure. This is done by providing a list of allowed container registries. It also contains the raw Rego policy definition (under the `target` section). This policy evaluates containers and initContainers to ensure that the container repository name starts with the values provided by the constraint. The `msg` section defines the message that is sent back to the user if the policy is violated.

## Creating Constraints

In order to instantiate a policy, you must create a constraint that provides the template's required parameters. There may be many constraints that match the kind of a specific constraint template. Let's take a closer look at the constraint we used in [Example 15-6](#), which allows only container images that originate from `gcr.io/kuar-demo/`.

---

### *Example 15-6. allowedrepos-constraint.yaml*

```

apiVersion: constraints.gatekeeper.sh/v1beta1
kind: K8sAllowedRepos
metadata:
  name: repo-is-kuar-demo
spec:
  enforcementAction: deny
  match:
    kinds:
      - apiGroups: [""]
        kinds: ["Pod"]
  namespaces:
    - "default"

```

**parameters:**

**repos:**

- "gcr.io/kuar-demo/"

You may notice that the constraint is of the kind “K8sAllowedRepos”, which was defined as part of the constraint template. It also defines an enforcementAction of “deny”, meaning that noncompliant resources will be denied. enforcementAction also accepts “dryrun” and “warn”: “dryrun” uses the audit feature to test policies and verify their impact; “warn” sends a warning back to the user with the associated message, but allows them to create or update. The match portion defines the scope of this constraint; all Pods in the default namespace. Finally, the parameters section is required to satisfy the constraint template (an array of strings). The following demonstrates the user experience when the enforcementAction is set to “warn”:

```
$ kubectl apply -f noncompliant-pod.yaml
Warning: [repo-is-kuar-demo] container <nginx> has an invalid
image repo <nginx>, allowed repos are ["gcr.io/kuar-demo/"]
pod/nginx-noncompliant created
```

## WARNING

Constraints are only enforced on resource CREATE and UPDATE events. If you already have workloads running on a cluster, Gatekeeper will not re-evaluate them until a CREATE or UPDATE event takes place.

Here is a real-world example to demonstrate: Say you create a policy that only allows containers from a specific registry. All workloads that are already running on the cluster will continue to do so. If you scale the workload Deployment from 1 to 2, the ReplicaSet will attempt to create another Pod. If that Pod doesn’t have a container from an allowed repository, then it will be denied. It’s important to set the enforcementAction to “dryrun” and audit to confirm that any policy violations are known before setting the enforcementAction to “deny”.

## Audit

Being able to enforce policy on new resources is only one piece of the policy and governance story. Policies often change over time, and you can

also use Gatekeeper to confirm that everything currently deployed is still compliant. Additionally, you may already have a cluster full of services and wish to install Gatekeeper to bring these resources into compliance. Gatekeeper's audit capabilities allow cluster administrators to get a list of current noncompliant resources on a cluster.

In order to demonstrate how auditing works, let's look at an example. We're going to update the `repo-is-kuar-demo` constraint to have an `enforcementAction` action of "dryrun" (as shown in [Example 15-7](#)). This will allow users to create non-compliant resources. We will then determine which resources are noncompliant using audit.

---

*Example 15-7. allowedrepos-constraint-dryrun.yaml*

---

```
apiVersion: constraints.gatekeeper.sh/v1beta1
kind: K8sAllowedRepos
metadata:
  name: repo-is-kuar-demo
spec:
  enforcementAction: dryrun
  match:
    kinds:
      - apiGroups: [""]
        kinds: ["Pod"]
    namespaces:
      - "default"
  parameters:
    repos:
      - "gcr.io/kuar-demo/"
```

Update the constraint by running the following command:

```
$ kubectl apply -f allowedrepos-constraint-dryrun.yaml
k8sallowedrepos.constraints.gatekeeper.sh/repo-is-kuar-demo
configured
```

Create a non-compliant Pod using the following command:

```
$ kubectl apply -f noncompliant-pod.yaml
pod/nginx-noncompliant created
```

To audit the list of noncompliant resources for a given constraint, run a `kubectl get constraint` on that constraint and specify that you want the output in YAML format as follows:

```
$ kubectl get constraint repo-is-kuar-demo -o yaml
apiVersion: constraints.gatekeeper.sh/v1beta1
kind: K8sAllowedRepos
....
spec:
  enforcementAction: dryrun
  match:
    kinds:
      - apiGroups:
          - ""
            kinds:
              - Pod
  namespaces:
    - default
  parameters:
    repos:
      - gcr.io/kuar-demo/
status:
  auditTimestamp: "2021-07-14T20:05:38Z"
  ...
  totalViolations: 1
  violations:
    - enforcementAction: dryrun
      kind: Pod
      message: container <nginx> has an invalid image repo <nginx>,
      allowed repos are
        ["gcr.io/kuar-demo/"]
      name: nginx-noncompliant
      namespace: default
```

Under the `status` section, you can see the `auditTimestamp`, which is the last time the audit was run. `totalViolations` lists the number of resources that violate this constraint. The `violations` section lists the violations. We can see that the `nginx-noncompliant` Pod is in violation and the message with the details why.

## NOTE

Using a constraint enforcementAction of “dryrun” along with audit is a powerful way to confirm that your policy is having the desired impact. It also creates a workflow to bring resources into compliance.

## Mutation

So far we have covered how you can use constraints to validate if a resource is compliant. What about modifying resources to make them compliant? This is handled via the mutation feature in Gatekeeper. Earlier in this chapter we discussed two different type of admission webhooks, mutating and validating. By default, Gatekeeper is only deployed as a validating admission webhook, but it can be configured to operate as a mutating admission webhook.

## NOTE

Mutation features in Gatekeeper are in beta state and may change. We share them to demonstrate Gatekeeper’s upcoming capabilities. The installation steps in this chapter do not cover enabling mutation. Please refer to the Gatekeeper project for more information on [enabling mutation](#).

Let’s walk through an example to demonstrate the power of mutation. In this example we will set the `imagePullPolicy` to “Always” on all Pods. We will assume that Gatekeeper is configured correctly to support mutation. The example in [Example 15-8](#) defines a mutation assignment that matches all Pods except in the “system” namespace, and assigns a value of “Always” to `imagePullPolicy`:

---

*Example 15-8. `imagepullpolicyalways-mutation.yaml`*

---

```
apiVersion: mutations.gatekeeper.sh/v1alpha1
kind: Assign
metadata:
  name: demo-image-pull-policy
spec:
  applyTo:
```

```
- groups: []
  kinds: ["Pod"]
  versions: ["v1"]
match:
  scope: Namespaced
  kinds:
    - apiGroups: ["*"]
      kinds: ["Pod"]
    excludedNamespaces: ["system"]
location: "spec.containers[name:*].imagePullPolicy"
parameters:
  assign:
    value: Always
```

Create the mutation assignment:

```
$ kubectl apply -f imagepullpolicyalways-mutation.yaml
assign.mutations.gatekeeper.sh/demo-image-pull-policy created
```

Now create a Pod. This Pod doesn't have `imagePullPolicy` explicitly set so by default this field is set to "IfNotPresent". However, we expect Gatekeeper to mutate this field to "Always".

```
$ kubectl apply -f compliant-pod.yaml
pod/kuard created
```

Validate that the `imagePullPolicy` has been successfully mutated to "Always" by running the following:

```
$ kubectl get pods kuard -o=jsonpath="
{.spec.containers[0].imagePullPolicy}"
Always
```

### NOTE

Mutating admission happens before validating admission so create constraints that validate the mutations you expect to apply to the specific resource.

Delete the Pod using the following command:

```
$ kubectl delete -f compliant-pod.yaml
pod/kuard deleted
```

Delete the mutation assignment using the following command:

```
$ kubectl delete -f imagepullpolicyalways-mutation.yaml
assign.mutations.gatekeeper.sh/demo-image-pull-policy deleted
```

Unlike validation, mutation provides a way to remediate noncompliant resources automatically on behalf of the cluster administrator.

## Data Replication

When writing constraints you may want to compare the value of one field to the value of a field in another resource. A specific example of when you might need to do this is making sure that ingress hostnames are unique across a cluster. By default, Gatekeeper can only evaluate fields within the current resource: if comparisons across resources are required to fulfill a policy, it must be configured. Gatekeeper can be configured to cache specific resources into Open Policy Agent to allow comparisons across resources. The resource in [Example 15-9](#) configures Gatekeeper to cache Namespace and Pod resources.

### *Example 15-9. config-sync.yaml*

---

```
apiVersion: config.gatekeeper.sh/v1alpha1
kind: Config
metadata:
  name: config
  namespace: "gatekeeper-system"
spec:
  sync:
    syncOnly:
      - group: ""
        version: "v1"
        kind: "Namespace"
      - group: ""
        version: "v1"
        kind: "Pod"
```

## NOTE

You should only cache the specific resources needed to perform a policy evaluation. Having hundreds or thousands of resources cached in OPA will require more memory and may also have security implications.

The constraint template in [Example 15-10](#) demonstrates how to compare something in the Rego section (in this case, unique ingress hostnames). Specifically, “data.inventory” refers to the cache resources, as opposed to “input”, which is the resource sent for evaluation from the Kubernetes API server as part of the admission flow. This example is based on the [Gatekeeper policy library](#).

### *Example 15-10. uniqueingresshost-constraint-template.yaml*

---

```
apiVersion: templates.gatekeeper.sh/v1beta1
kind: ConstraintTemplate
metadata:
  name: k8suniqueingresshost
  annotations:
    description: Requires all Ingress hosts to be unique.
spec:
  crd:
    spec:
      names:
        kind: K8sUniqueIngressHost
  targets:
    - target: admission.k8s.gatekeeper.sh
      rego: |
        package k8suniqueingresshost

        identical(obj, review) {
          obj.metadata.namespace ==
review.object.metadata.namespace
          obj.metadata.name == review.object.metadata.name
        }

        violation[{"msg": msg}] {
          input.review.kind.kind == "Ingress"
          re_match("^extensions|networking.k8s.io)$",
input.review.kind.group)
          host := input.review.object.spec.rules[_].host
          other := data.inventory.namespaces[ns][otherapiversion]
          ["Ingress"] [name]
```

```
        re_match("^(extensions|networking.k8s.io)/.+$",  
otherapiversion)  
            other.spec.rules[_].host == host  
            not identical(other, input.review)  
            msg := sprintf("ingress host conflicts with an existing  
ingress <%v>", [host])  
    }
```

Data replication is a powerful tool that allows you to make comparisons across Kubernetes resources. We recommend only configuring it if you have policies that require it to function. If you use it, scope it only to the relevant resources.

## Metrics

Gatekeeper emits metrics in Prometheus format to enable continuous resource compliance monitoring. You can view simple metrics regarding Gatekeeper's overall health , such as the numbers of constraints, constraint templates, and requests being set to Gatekeeper.

In addition, details on policy compliance and governance are also available:

- The total number of audit violations
- Number of constraints by enforcementAction
- Audit duration

### NOTE

Completely automating the policy and governance process is the ideal goal state, so we strongly recommended that you monitor Gatekeeper from an external monitoring system and set alerts based on resource compliance.

## Policy Library

One of the core tenets of the Gatekeeper project is to create reusable policy libraries that can be shared between organizations. Being able to share policies reduces boilerplate policy work and allows cluster administrators to

focus on applying policy rather than writing it. The Gatekeeper project has a great [policy library](#). It contains a general library with the most common policies as well as a pod-security-policy library that models the capabilities of the PodSecurityPolicy API as Gatekeeper policy. The great thing about this library is that it is always expanding and is open source, so feel free to contribute any policies that you write.

## Summary

In this chapter you've learned about policy and governance and why they are important as more and more resources are deployed to Kubernetes. We covered the Gatekeeper project, a Kubernetes-native policy controller built on Open Policy Agent, and showed you to use it to meet your policy and governance requirements. From writing policies to auditing, you are now equipped with the know-how to meet your compliance needs.

# Chapter 16. Multi-cluster Application Deployments

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## A NOTE FOR EARLY RELEASE READERS

With Early Release ebooks, you get books in their earliest form—the author’s raw and unedited content as they write—so you can take advantage of these technologies long before the official release of these titles.

This will be the 21th chapter of the final book. Please note that the GitHub repo will be made active later on.

If you have comments about how we might improve the content and/or examples in this book, or if you notice missing material within this chapter, please reach out to the editor at [sgrey@oreilly.com](mailto:sgrey@oreilly.com).

Twenty chapters into this book it should be clear that Kubernetes can be a complex topic, though of course we hope that if you have made it thus far it is less murky than it was. Given the complexities of building and running an application in a single Kubernetes cluster, why would you incur the added complexity of designing and deploying your application into multiple clusters?

The truth is that the demands of the real world mean that multi-cluster application deployment is a reality for most applications. There are many different reasons for this and it is likely that your application fits under at least one of these requirements.

The first requirement is one of redundancy and resiliency. Whether in the cloud or on-premise, a single datacenter is generally a single failure domain. Whether it is a hunter using a fiber-optic cable for target practice, a power outage from an ice storm or simply a botched software rollout, any application deployed to a single location can fail completely and leave your users without a recourse. In many cases a single Kubernetes cluster is tied to a single location and thus is a single failure domain.

In some cases, especially in cloud environments, the Kubernetes cluster is designed to be *regional*. Regional clusters span across multiple independent zones and are thus resilient to the problems in the underlying infrastructure described above. It would be tempting then to assume that such regional clusters are sufficient for resiliency and they might be except for the fact that Kubernetes itself can be a single point of failure. Any single Kubernetes cluster is tied to a specific version of Kubernetes (e.g. 1.21.3) and it is very possible for an upgrade of the cluster to break your application. From time to time Kubernetes deprecates APIs or changes the behavior of those APIs. These changes are infrequent, and the Kubernetes community takes care to make sure that they are communicated ahead of time. Additionally, despite a great deal of testing, bugs do creep into a release from time to time. Though it is unlikely for any one issue to affect your application, viewed over the lifespan of most application (years) it’s probably that your application will be affected at some point. For most applications that’s not a risk that is acceptable.

In addition to resiliency requirements, another strong driver of multi-cluster deployments is some business or application need for regionaly affinity. For example, game servers have a strong need to be near to the players to reduce network latency and improve the playing experience. Other applications may be subject to legal or regulatory requirements that demand that data be located within specific geographic regions. Since any Kubernetes cluster is tied to a specific place, these needs for application deployment to specific geographies means that applications must span multiple clusters.

Finally, though there are numerous ways to isolate users within a single cluster (e.g. Namespaces, RBAC, Node Pools), a Kubernetes cluster is still largely a single cooperative space. For some teams and some products the

risks of a different team impacting their application, even by accident, are not worth it and they would rather take on the complexity of managing multiple clusters.

At this point you can see that regardless of your application its very likely that either now or sometime in the near future your application will need to span multiple different clusters. The rest of this chapter will help you understand how to accomplish that.

## Before you even begin

As you think about multi-cluster deployments of your application it is critical that you have the right foundation in place in a single cluster deployment before you consider moving to multiple clusters. There is inevitably a list of *TODO* items that everyone has for their set-up, but such short-cuts and problems are magnified in a multi-cluster deployment. Similarly, fixing foundational problems in your infrastructure is ten times harder when you have ten clusters. Furthermore if adding an additional cluster incurs significant extra work, you will resist adding additional clusters, when (for all of the reasons above) it is the right thing to do for your application.

When we say “foundations” what do we mean? The most important part to get right is automation. Importantly this includes both automation to deploy your application(s), but also automation to create and manage the clusters themselves. When you have a single cluster, it is consistent with itself by definition. However, when you add in additional clusters you add the possibility of version skew between all of the pieces of your cluster. You could have clusters with different Kubernetes versions, different versions of your monitoring and logging agents or even something as basic as the container runtime. All of this variance should be viewed as something that makes your life harder. Differences in your infrastructure make your system “weirder.” Knowledge gained in one cluster does not transfer over to other clusters, and problems sometimes only occur seemingly at random in certain places because of this variability. One of the most important parts of maintaining a stable foundation is maintaining consistency across all of your clusters.

The only way to achieve this consistency is automation. You may think “I always create clusters this way” but experience has taught us that this is simply not true. The next chapter discusses at length the value of infrastructure as code for managing your applications, but the same things apply to managing your clusters. Don’t use a GUI or CLI tool to create your cluster. It may seem cumbersome at first to push all changes through source control and CI/CD, but the stable foundation pays significant dividends.

The same thing is true of the foundational components that you deploy into your clusters. These components are things like monitoring, logging and security scanners which need to be present before any application is deployed. These tools also need to be managed using infrastructure as code tools like Helm and deployed using automation.

Moving beyond the shape of your clusters, there are other aspects of consistency that are necessary. The first is using a single identity system for all of your clusters. Though Kubernetes supports simple certificate-based authentication, we strongly suggest using integrations with a global identity provider such as Azure Active Directory or any other OpenID Connect compatible identity provider. Ensuring that everyone uses the same identity when accessing all of the clusters is a critical part of maintaining security best practices and avoiding dangerous behaviors like sharing certificates. Additionally, most of these identity providers make available additional security controls like two-factor authentication which enhance the security of your clusters.

Just like identity, it is also critical to ensure consistent access control to your clusters. In most clouds, this means using cloud-based RBAC where the RBAC roles and bindings are stored in a central cloud location rather than in the clusters themselves. Defining RBAC in a single location prevents mistakes like leaving permissions behind in one of your clusters or failing to add permissions to some single cluster. Unfortunately if you are defining RBAC for on-premise clusters the situation is somewhat more complicated than it is for identity. There are some solutions (e.g. Azure Arc for Kubernetes) that can provide RBAC for on-premise

clusters, but if such a service is not available in your environment, defining RBAC in source control and using infrastructure as code to apply the rules to all of your clusters can ensure consistent privileges are applied across your fleet.

Similarly, when you think about defining policy for your clusters, it's critical to define those policies in a single place and have a single dashboard for viewing the compliance state of all clusters. As with RBAC such global services are often available via your cloud provider, but for on-premise there are limited options. Using infrastructure as code for policies as well can help close this gap and ensure that you can define your policies in a single place.

Just like setting up the right unit testing and build infrastructure is critical to your application development, setting the right foundation for managing multiple Kubernetes clusters sets the stage for stable application deployments across a broad fleet of infrastructure. In the coming sections we'll talk about how to build your application to operate successfully in a multi-cluster environment.

## Starting at the top with a load-balancing approach

Once you begin to think about deploying your application into multiple locations it becomes essential to think about how users get access to your application. Typically this is through a domain name (e.g. my.company.com). Though we will spend a great deal of time discussing how to construct your application for operation in multiple locations, a more important place to start is how access is implemented. This is both because obviously enabling people to use your application is essential, but also because the design of how people access your application can improve your ability to quickly respond and re-route traffic in the case of unexpected load or failures.

Access to your application starts with a domain name. This means that the start of your multi-cluster load-balancing strategy starts with a DNS lookup. This DNS lookup is the first choice in your load balancing strategy. In many traditional load-balancing approaches, this DNS lookup was used for routing traffic to specific locations. This is generally referred to as "GeoDNS". In GeoDNS, the IP address returned by the DNS lookup is tied to the physical location of the client. The IP address is generally the regional cluster that is closest to the client.

Though Geo DNS is still prevalent in many applications and may be the only possible approach for on-premise applications, it has a number of drawbacks. The first is that DNS is cached in various places throughout the internet and though you can set the time-to-live (TTL) for a DNS lookup, there are many places where this TTL is ignored in pursuit of higher performance. In steady state operation this caching isn't a big deal since DNS is generally pretty stable regardless of the TTL. However it becomes a very big deal when you need to move traffic from one cluster to another, for example in response to an outage in a particular data center. In such urgent cases, the fact that DNS lookups are cached can significantly extend the duration and impact of the outage. Additionally since GeoDNS is guessing your physical location based on your client's IP address, it is frequently confused and guesses the wrong locations when many different clients egress their traffic from the same firewall's IP address despite being in many different geographic locations.

The other alternative to using DNS to select your cluster is a load-balancing technique known as "Anycast". With Anycast networking a single static IP address is advertised from multiple locations around the internet using core routing protocols. While traditionally we think of an IP address mapping to a single machine, with Anycast networking the IP address is actually a virtual IP address that is routed to a different location depending on your network location. Your traffic is routed to the "closest" location based on the distance in terms of network performance rather than geographic distance. Anycast networking generally produces better results, but it is not always available in all environments.

One final consideration as you design your load-balancing is whether the load-balancing happens at the TCP or HTTP level. So far we have only discussed TCP level balancing, but for web-based applications there are

significant benefits for load-balancing at the HTTP layer. If you are writing an HTTP-based application (as most applications these days are), then using a global HTTP-aware load balancer enables you to be aware of more details of the client communication. For example you can make load-balancing decisions based on cookies that have been set in the browser. Additionally a load balancer that is aware of the protocol can make smarter routing decisions since it sees each HTTP request instead of just a stream of bytes across a TCP connection.

Regardless of which approach you choose, ultimately the location of your service is mapped from a global DNS endpoint to a collection of regional IP addresses representing the entry point to your service. These IP addresses are generally the IP address of a Kubernetes Service or Ingress resource that you have learned about in previous chapters of the book. Once the user traffic hits that endpoint it will flow through your cluster based on the design of your application.

## Building applications for multiple clusters.

Once you have load balancing sorted out, the next challenge for designing a multi-cluster application is thinking about state. Ideally your application doesn't require state, or all of the state is read-only. In such circumstances there is little that you need to do to support multiple cluster deployments. Your application can be deployed individually to each of your clusters, a load balancer added to the top and your multi-cluster deployment is complete. Unfortunately, for most applications there is state that must be managed in a consistent way across the replicas of your application. If you don't handle state correctly, your users will end up with a confusing, flawed experience.

To understand how replicated state impacts user experience, let's use a simple retail shop as an example. It's obvious to see that if you only store a customer's order in one of your multiple clusters, the customer may have the unsettling experience of being unable to see their order when their requests move to a different region, either because of load-balancing, or because they physically move geographies. So it is clear that a user's state needs to be replicated across regions. It may be somewhat less clear that the approach to replication also can impact the customer experience. The challenges of replicated data and customer experience is succinctly captured by the question: "Can I read my own write?" It may seem obvious that the answer should be "yes" but achieving this is harder than it seems. Consider for example a customer who places an order on their computer, but then immediately tries to view it on their phone. They may be coming at your application from two entirely different networks and consequently landing on two completely different clusters. A user's expectation around their ability to see an order that they just placed are an example of data *consistency*.

Consistency governs how you think about replicating data. We assume that we want our data to be consistent, that is that we will be able to read the same data regardless of where we read from, but the complicating factor is time. How quickly must our data be consistent? And do we get any sort of error indication when it is not consistent? There are two basic models of consistency: *Strong consistency*, which guarantees that a write doesn't succeed until it has been successfully replicated and *eventual consistency* where a write always succeeds immediately and is only guaranteed to be successfully replicated at some later point in time. Some systems also provide the ability for the client to chose their consistency needs per request. For example Azure's CosmosDB implements *bounded consistency* where there are some assurances about how stale data may be in an eventually consistent system. Google's Cloud Spanner enables clients to specify that they are willing to tolerate stale reads in exchange for better performance.

It might seem that everyone would choose strong consistency, as it is clearly an easier model to reason about, the data is always the same everywhere. But strong consistency comes at a price. It takes much more effort to guarantee the replication at the time of the write and many more writes will fail when replication isn't possible. Strong consistency is more expensive and can support many fewer simultaneous transactions relative to eventual consistency. Eventual consistency is cheaper and can support much higher write load, but it is more complicated for the application developer and may expose some edge conditions to the end user. Both because

some storage systems only support one or the other consistency model, or the consistency model must be chosen at the time of creating the storage and because the choice has significant implications for end-user experience. Chosing your consistency model is an important first step before designing your application for multiple environments.

#### NOTE

Deploying and managing replicated stateful storage is a complicated task that requires a dedicated team with domain expertise to setup, maintain and monitor. You should strongly consider using cloud-based storage for a replicated data store so that this burden is carried by the depth of a large team at the cloud provider rather than your own teams. In an on-premise environment, you can also offload support of storage to a company that has focused expertise on running the storage solution that you choose. Only when you are at large scale does it make sense to invest in building your own team to manage storage.

Once you have determined your storage layer, the next step is to build up your application design.

### **Replicated silos: The simplest cross-regional model**

The simplest way to replicate your application across multiple clusters and multiple regions is simply to copy your application into every region. Each instance of your application is an exact clone and looks exactly alike no matter which cluster it is running in. Because there is a load balancer at the top spreading customer requests and you have implemented data replication in the places where you need state, your application doesn't need to change much in order to support this model. Depending on the consistency model for your data that you choose, you will need to deal with the fact that data may not be replicated quickly between regions, but especially if you opt for strong consistency this won't require major application re-factoring.

When you design your application this way each region is its own silo. All of the data that it needs is present within the region and once a request enters that region it is served entirely by the containers running in that one cluster. This has significant benefits in terms of reduced complexity, but as is always the case, this comes at the cost of efficiency.

To understand how the silo approach impacts efficiency, consider an application that is distributed to a large number of geographic regions around the world in order to deliver very low latency to their users. The reality of the world is that some geographic regions have large populations and some regions have small populations. If every silo in each cluster of the application is exactly the same, then every silo has to be sized to meet the needs of the largest geographic region. The result of this is that most replicas of the application in regional clusters are massively over-provisioned and thus cost efficiency for the application is low. The obvious solution to this excess cost is to reduce the size of the resources used by the application in the smaller geographic regions. While it might seem easy to resize your application, it's not always feasible due to bottlenecks or other requirements (e.g. maintaining at least three replicas).

Especially when taking an existing application from single-cluster to multi-cluster a replicated silos design is the easiest approach to use, but it is worth understanding that it comes with costs that may be sustainable initially but eventually will require your application to be refactored.

### **Sharding: Regional data**

As your application scales one of the pain points that you are likely to encounter with a regional silo approach is that globally replicating all of your data becomes increasingly expensive and also increasingly wasteful. While replicating data for reliability is a good thing, it is unlikely that all of the data for your application needs to be co-located in every cluster where you deploy your application. Most users will only access your application from a small number of geographic regions.

Additionally, as your application grows around the world you may encounter regulatory and other legal requirements around data locality. There may be external restrictions on where you store a user's data depending on their nationality or other considerations. The combination of these requirements means that eventually you will need to think about regional data sharding. Sharding your data across regions means that not all data is present in all of the clusters where your application is present and this (obviously) impacts the design of your application.

As an example of what this looks like, imagine that our application is deployed into six regional clusters (A, B, C, D, E, F). We take the data set for our application and we break the data into three subsets or *shards* (1, 2, 3).

Our data shard deployment then might look as follows:

	A	B	C	D	E	F
1	✓	-	-	✓	-	-
2	-	✓	-	-	✓	-
3	-	-	-	✓	-	✓

Each shard is present in two regions for redundancy, but each regional cluster can only serve one third of the data. This means that you have to add an additional routing layer to your service whenever you need to access the data. The routing layer is responsible for determining whether the request needs to go to a local or cross-regional data shard.

While it might be tempting to simply implement this data routing as part of a client library that is linked into your main application, we strongly recommend that the data routing be built as a separate micro-service. While introducing a new micro-service might seem to introduce complexity, it actually introduces an abstraction that simplifies things. Instead of every service in your application worrying about data routing, you have a single service that encapsulates those concerns and all other services simply access the data service. Applications that are separated into independent micro-services provide significant flexibility in multi-cluster environments.

## Better flexibility: Micro-service routing

When we discussed the regional silo approach to multi-cluster application development we gave an example of how it might reduce the cost-efficiency of your deployed multi-cluster application. But there are other impacts to flexibility as well. In creating the silo, you are creating at a larger scale the same sort of monoliths that containers and Kubernetes seeks to break up. Further-more you are forcing every micro-service within an application to scale at the same time to the same number of regions.

If your application is small and contained, this may make sense, but as your services become larger and especially when they may start being shared between multiple applications, the monolithic approach to multi-cluster begins to significantly impact your flexibility. If a cluster is the unit of deployment and all of your CI/CD is tied to that cluster, you will force every team to adhere to the same roll-out process and schedule even if it is a bad fit.

To see a concrete example of this, suppose you have one very large application that is deployed to thirty cluster and a small new application under development. It doesn't make sense to force the small team developing a new application to immediately reach the scale of your larger application, but if you are too rigid in your application design, this can be exactly what happens.

A better approach is to treat each microservice within your application as a public facing service in terms of it's application design. It may never be expected to actually be public facing, but it should have it's own global load balancer as described in the sections above, it should manage it's own data replication service. For all intents and purposes the different micro-services should be independent of each other. When a service calls into a different service, it's load is balanced in the same way that external load would be. With this abstraction in place, each team can scale and deploy their multi-cluster service independently, just like they do within a single cluster.

Of course, doing this for every single micro-service within an application can become a significant burden on your teams and can also increase costs via the maintenance of a load-balancer for each service and also possibly cross-regional network traffic. Like everything in software design there is a trade-off between complexity and performance and you will need to determine for your application the right places to add the isolation of a service boundary, and where it makes sense to group services into a replicated silo. Just like micro-services in the single cluster context, this design is likely to change and adapt as your application changes and grows. Expecting (and designing for) with this fluidity in mind will help ensure that your application can adapt without requiring massive re-factoring.

## **Summary**

Though deploying your application to multiple clusters adds complexity, the requirements and user expectations in the real-world make this complexity necessary for most applications that you build. Designing your application and your infrastructure from the ground up to support multi-cluster application deployments will greatly increase the reliability of your application and significantly reduce the probability of a costly refactor as your application grows. One of the most important pieces of a multi-cluster deployment is managing the configuration and deployment of the application to the cluster. Whether it is regional or multi-cluster the following chapter will help ensure that you can quickly and reliably deploy your application.

## About the Authors

**Brendan Burns** is the cofounder of the Kubernetes open source project. He is also a Distinguished Engineer at Microsoft on the Azure team.

**Joe Beda** is the lead engineer for the Google Compute Engine project. He has been at Google for ~8 years and, besides GCE, Joe has worked on Google Talk, Goog-411 and Adwords keyword suggestions. Before Google, Joe was an engineer at Microsoft working on IE and WPF.

**Kelsey Hightower** has worn every hat possible throughout his career in tech and enjoys leadership roles focused on making things happen and shipping software. Kelsey is a strong open source advocate focused on building simple tools that make people smile. When he isn't slinging Go code, you can catch him giving technical workshops covering everything from programming to system administration.

**Lachlan Evenson** is a principal program manager on the container compute team at Microsoft Azure. He's helped numerous people onboard to Kubernetes through both hands-on teaching and conference talks.