7: Desired State and Data



Objectives



After completing this module, you should be able to

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

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



Cleaner Recipes

In the last section we updated our two cookbooks to display information about our node.

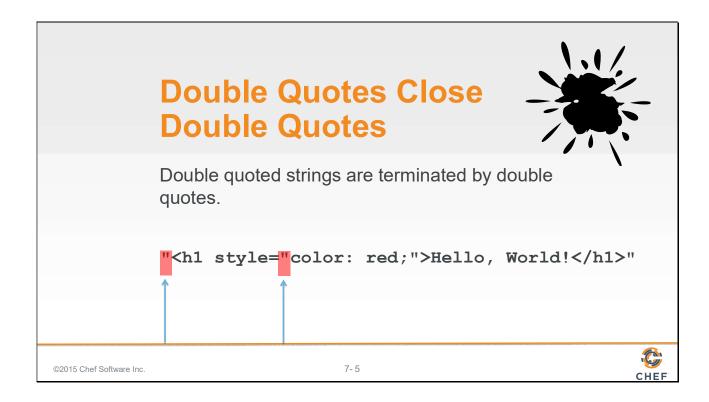
We added this content to the file resource in their respective recipes.

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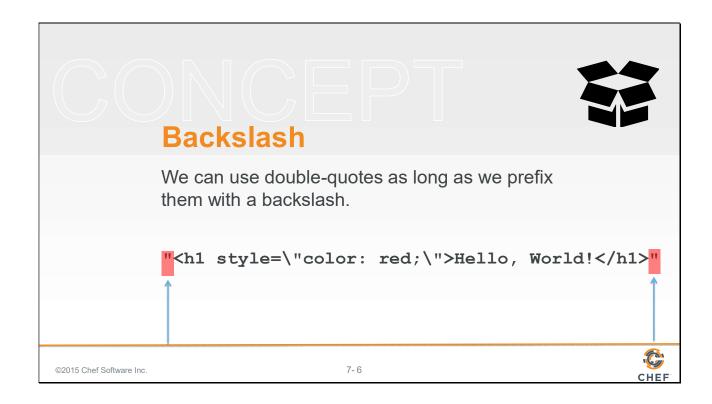


What if new changes are given to us for the website splash page? For each new addition we would need to return to this recipe and carefully paste the contents of the new HTML into the string value of the content attribute.

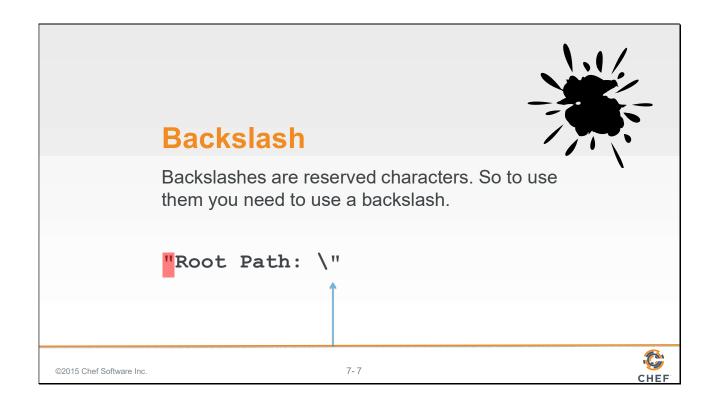


There are some things that you need to be careful of when working with double-quoted strings in Ruby:

Double-quoted strings are terminated by double-quotes so if any of the text that we paste into this content field has double quotes it is going to have to be escaped.



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



That also brings up an issue with continually-pasting text. You will also need to keep an eye out for backslash characters because backslash characters are now the escape character.

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



So every time text is pasted into the string value of the content attribute, you will need to find and replace all backslashes with double-backslashes and then replace all double-quotes with backslash double-quotes.

Unexpected Formatting file '/etc/motd' do content 'This is the first line of the file. This is the second line. If I try and line it up... Don't even think about pasting ASCII ART in here! end This is the first line of the file. This is the second line. If I try and line it up... Don't even think about pasting ASCII ART in here!

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

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

Copy Paste

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

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This could sound like a bug waiting to happen.

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

What We Need



We need the ability to store the data in another file, which is in the native format of the file we are writing out but that still allows us to insert ruby code...

...specifically, the node attributes we have defined.

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

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



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



GE: Let's Check the Docs...

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

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

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

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

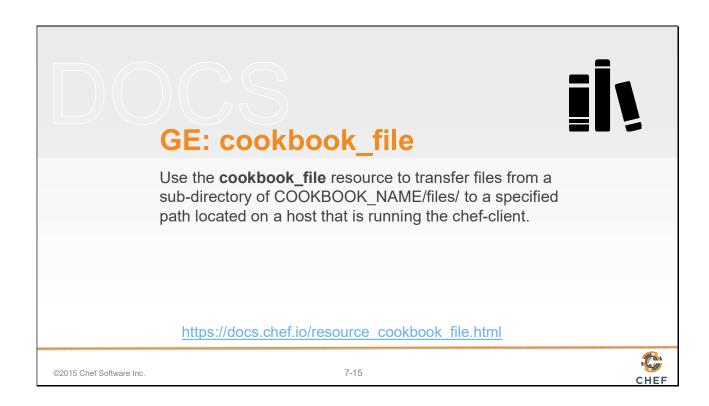
The file resource documentation suggests a couple of alternatives to using the file resource: cookbook file resource; template resource; and remote file resource.

Let's start with the remote_file resource.



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

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



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

```
Demo: cookbook_file's Source Match Up

$ tree cookbooks/apache/files/default
files/default
index.html

0 directories, 1 file
cookbook_file '/var/www/index.html' do
source 'index.html'
end
```

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

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

Template



A cookbook template is an Embedded Ruby (ERB) template that is used to generate files ... Templates may contain Ruby expressions and statements and are a great way to...

Use the template resource to add cookbook templates to recipes; place the corresponding Embedded Ruby (ERB) template in a cookbook's /templates directory.

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

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Let's explore templates.

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

```
Demo: Template File's Source Matches Up

$ tree cookbooks/apache/templates/default
templates/default

index.html.erb

0 directories, 1 file

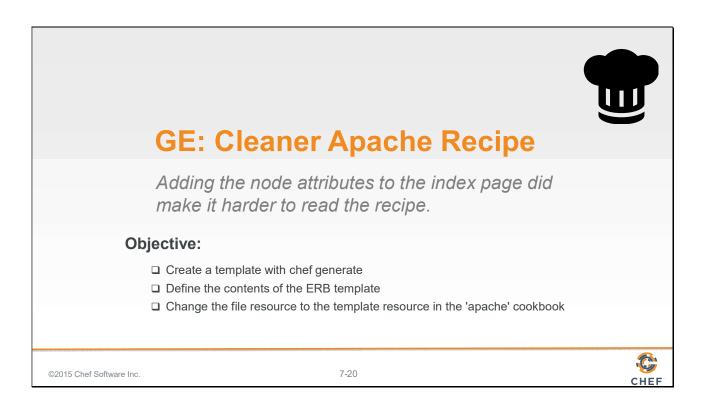
template 'var/www/index.html' do
source 'index.html.erb'
end
```

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

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

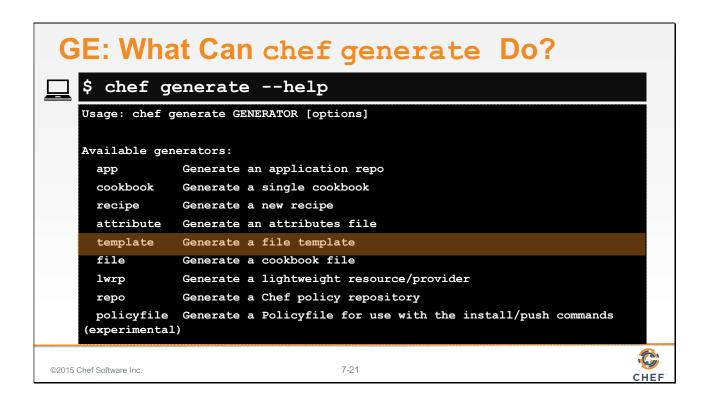


And if we look at the bottom section about "Using Templates", we'll see more information about what is required and how we can use them to escape out to execute ruby code.



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

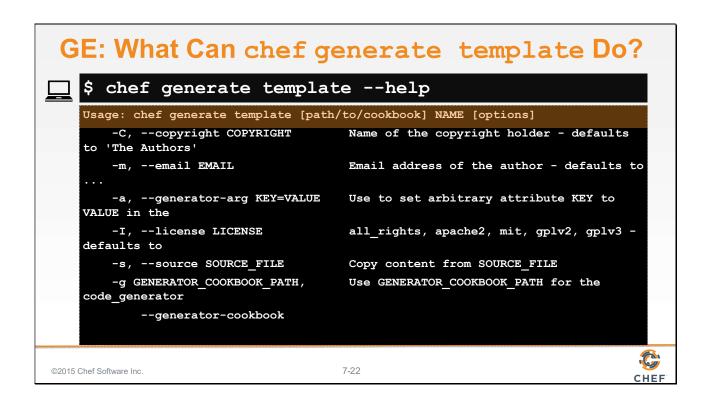
Let's start by creating the actual template file and then we will update the recipe.



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

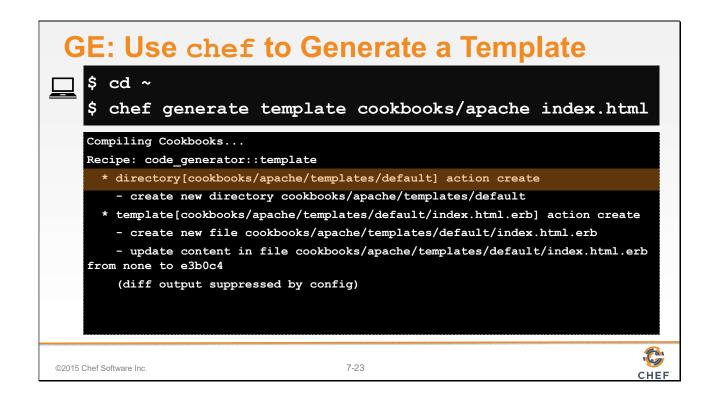
Templates and files (for cookbook_files) are a few of the other things it can generate for us.

Let's use help to review the command again. And let's ask for help about the 'generate' subcommand.

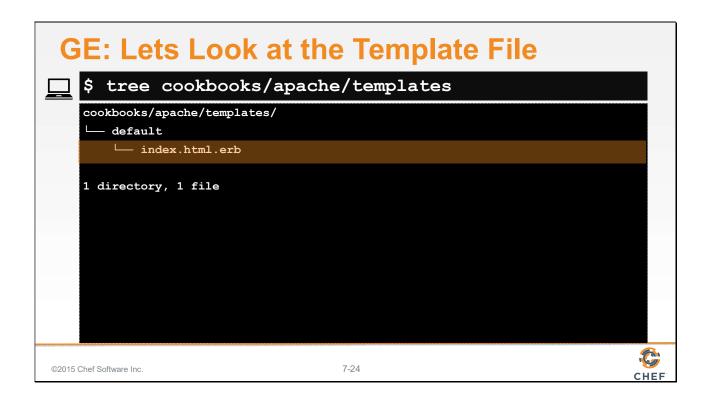


Finally let's ask for help for generating templates.

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



Use 'chef generate template' to create a template in the apache cookbook found in the cookbooks/apache directory and the file we want to create is named index.html.



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



Cleaner Recipes

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

Objective:

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

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Now we need to understand what ERB means.



An Embedded Ruby (ERB) template allows Ruby code to be embedded inside a text file within specially formatted tags.

Ruby code can be embedded using expressions and statements.

https://docs.chef.io/templates.html#variables

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

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Text Within an ERB Template <

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

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

Text Within an ERB Template

```
<% if (50 + 50) == 100 %>
50 + 50 = <%= 50 + 50 %>
<% else %>
At some point all of MATH I learned in school changed.
<% end %>.
```

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

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

Text Within an ERB Template <

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

Text Within an ERB Template

```
<% if (50 + 50) == 100 %>
50 + 50 = <%= 50 + 50 %>
<% else %>
At some point all of MATH I learned in school changed.
<% end %>
```

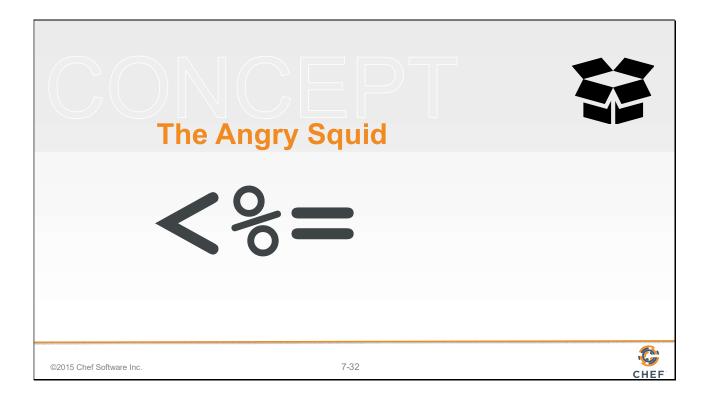
Executes the ruby code within the brackets and display the results.

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



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

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

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

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

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



Cleaner Recipes

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

Objective:

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

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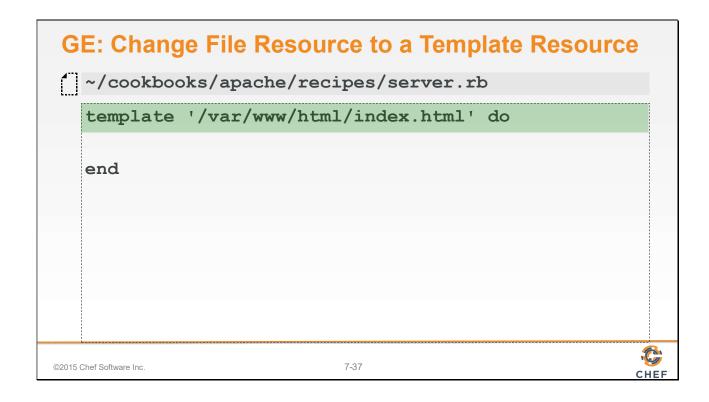
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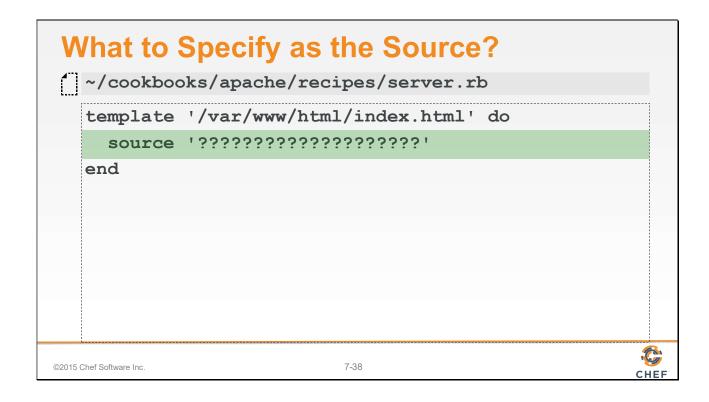
The template is created and the contents are correctly defined. It is time to update the recipe.

Let's open the apache cookbook's recipe named 'server'.

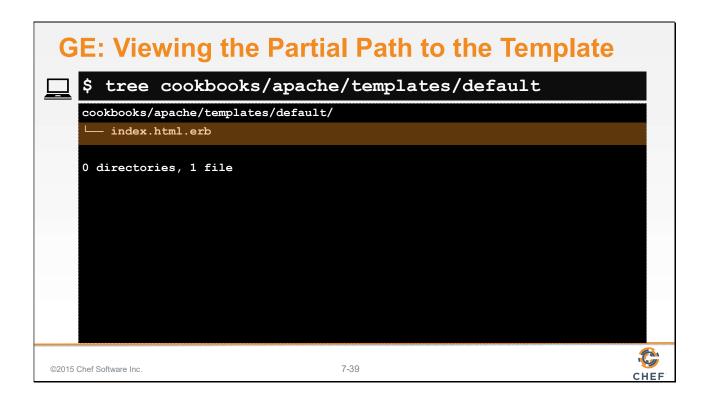
We will want to remove the content attribute from the file resource. Because that content is now in the template. But only if we use a template resource.



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

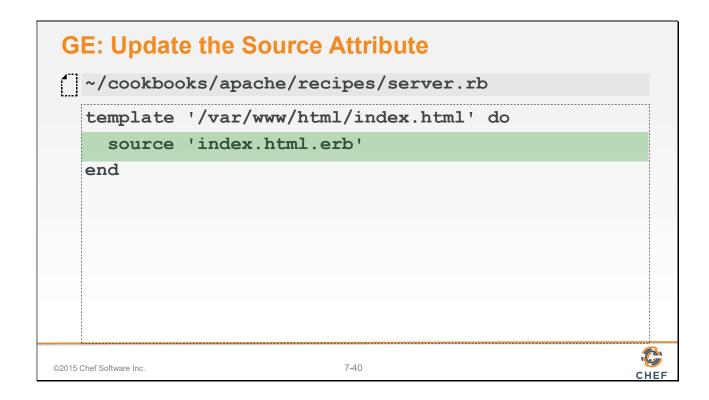


Lastly we need to specify a source attribute which contains that path to the template we generated. This path is relative starting from within the cookbook's template directory.



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

And we see the filepath index.html.erb.



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



Cleaner Recipes

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

Objective:

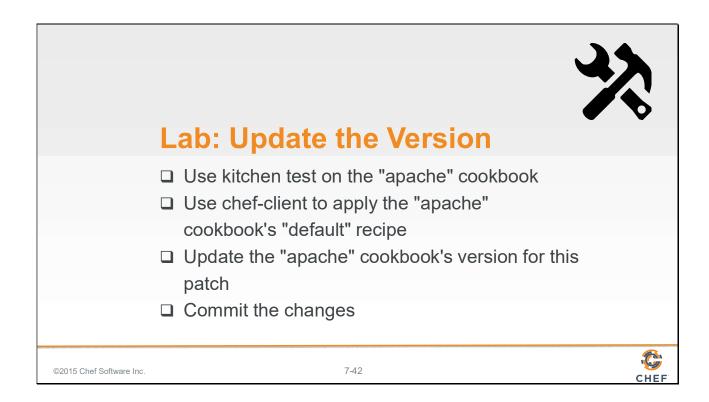
- ✓ Create a template with chef generate
- ✓ Define the contents of the ERB template
- ✓ Change the file resource to the template resource in the 'apache' cookbook

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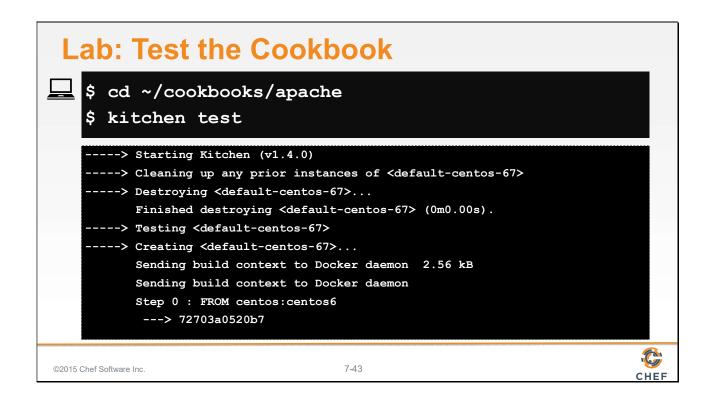
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We hopefully haven't changed the original goal of our recipe but we have made some changes.

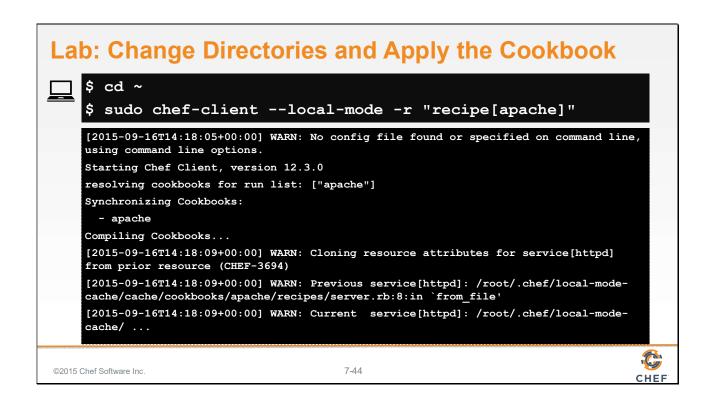


In this lab, you will use 'kitchen' to verify the cookbook and use 'chef-client' to apply the cookbook. If everything is working then update the patch number and commit the changes to version control.



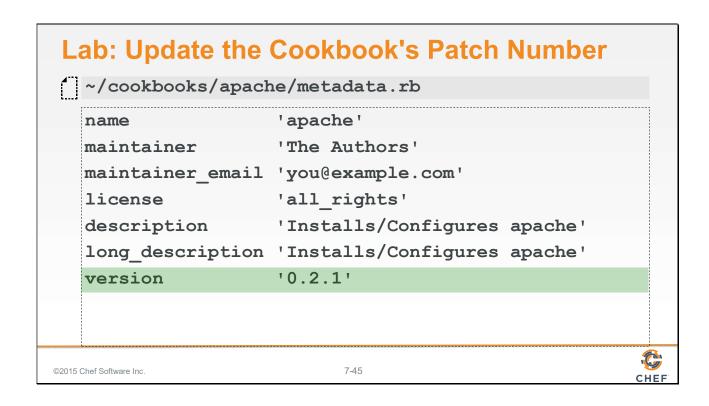
Since kitchen is a cookbook testing tool, you need to move into the cookbook's directory.

Then run the 'kitchen test' command, addressing any issues if they show up.

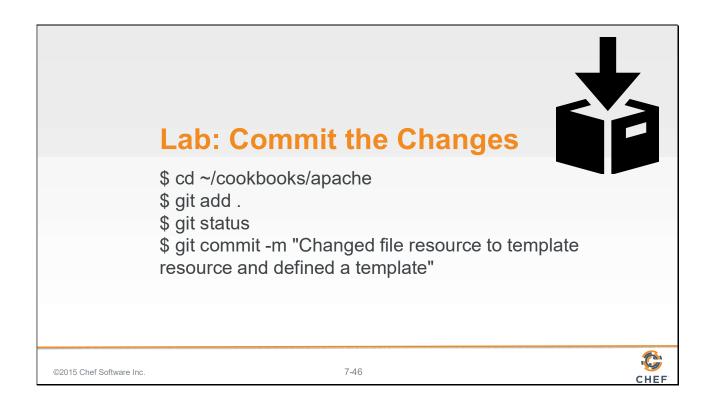


When all the tests pass, return to the home directory, so you can execute 'chef-client'.

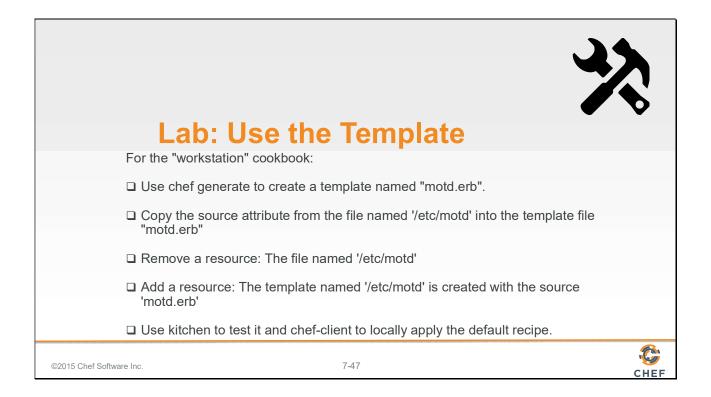
And then apply the apache cookbook's default recipe to the local system.



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



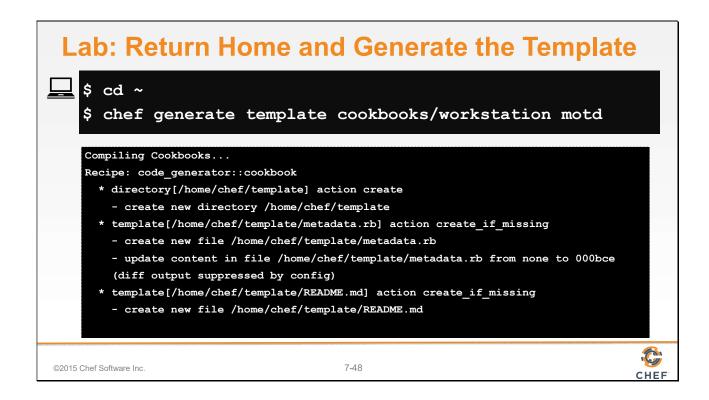
Return to the cookbook directory and add all the changed files and commit them with a message.



It's time to do that again--this time for the workstation cookbook.

Generate a template named 'motd', copy in the source attribute from the file resource, and then update it to use ERB tags.

Then come back to the recipe. Change it to a template resource and then add a source attribute whose value is that partial path to the new template you created.



Return to the home directory. Run the command to generate the template named 'motd' in the workstation cookbook.

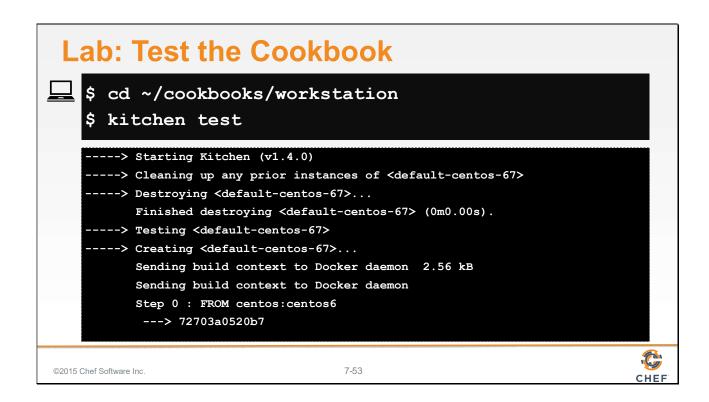
We can start by copying and pasting the existing content for the Message of the Day file into the template file.

Lab: Update the motd.erb to Use ERB "/cookbooks/workstation/templates/default/motd.erb Property of ... IPADDRESS: <%= node['ipaddress'] %> HOSTNAME : <%= node['hostname'] %> MEMORY : <%= node['memory']['total'] %> CPU : <%= node['cpu']['0']['mhz'] %> CPU : <%= node['cpu']['0']['mhz'] %>

Replace all the string interpolation with ERB tags.

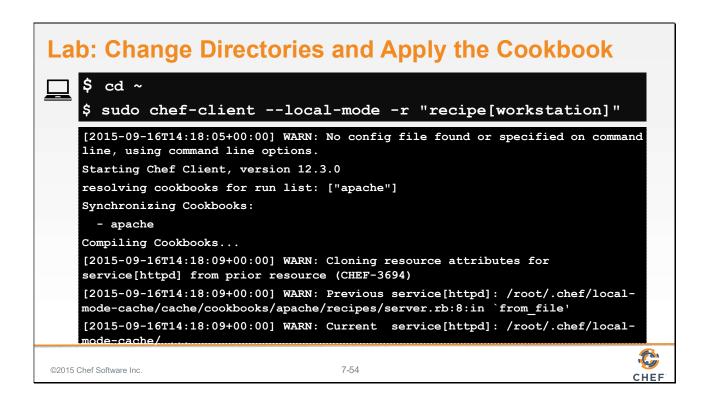
Remove the file resource from the setup recipe.

...and replace it with the Template resource. The source attribute specifies the file path 'motd.erb' - the new template file that was created.



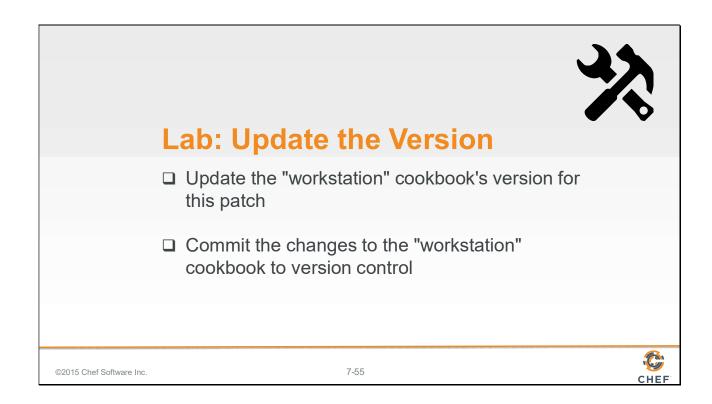
Since kitchen is a cookbook testing tool, you need to move into the cookbook's directory.

Then run the 'kitchen test' command, addressing any issues if they show up.

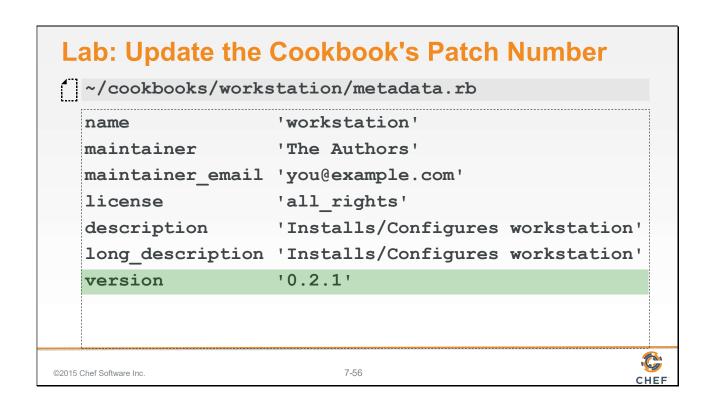


When all the tests pass, return to the home directory, so you can execute 'chef-client'.

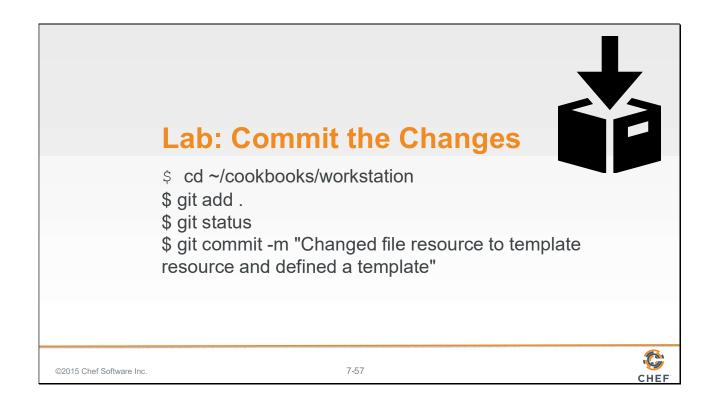
And then apply the workstation cookbook's default recipe to the local system.



With everything working it is time to update the patch version and commit the changes.



Update the patch version number for the workstation cookbook.



Add and then commit the changes to the workstation cookbook.

DISCUSSION



Discussion

What is the benefit of using a template over defining the content within a recipe? What are the drawbacks?

What do each of the ERB tags accomplish?

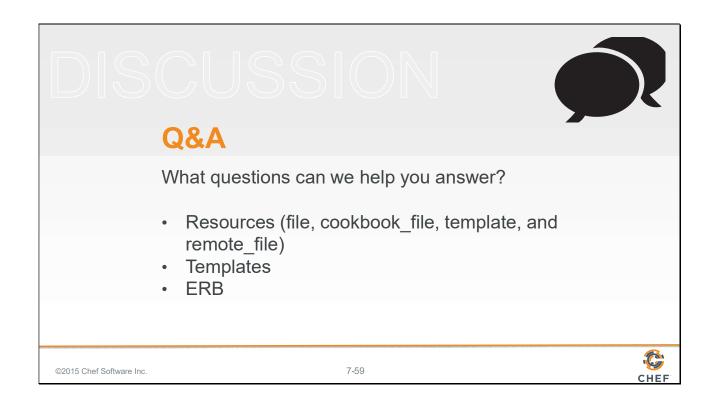
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Answer these questions.

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



What questions can we help you answer?

Generally or specifically about resources, templates, and ERB.

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