Managing Upgrades with Ansible catalyst 4

Presented by Travis Holton





About me

- I work at Catalyst here in Wellington
- I write code in
 - Perl (long ago), Python
- Nowadays almost exclusively "devops" related stuff
 - mostly Ansible
 - some Docker
 - tiny amounts of Puppet
- I also do training at Catalyst
 - Ansible
 - Kubernetes

Where to find me

- GitHub: github.com/heytrav
- Twitter: @heytrav
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About this course

- Assumes some experience with Ansible
- Assumes knowledge of basic concepts:
 - playbooks
 - plays
 - tasks
 - variables
- YAML

Goals of this workshop

- Examine different types of cluster deployment
- See how we can use built-in features of Ansible to manage deploying and upgrading
- Provide tools that can be used in any build or CI/CD pipeline

Course Outline

- Setup
- Cloud Signup
- Review basics
- Provisioning Machines
- Deploying the Application
- Upgrade Strategies
- In-place rolling upgrade
- Blue Green
- Closing

Source material

- Keating, Jesse. *Mastering Ansible*. Packt, 2015
- Hochstein, Lorin et al. Ansible Up & Running 2nd Edition. O'Reilly, 2017
- https://docs.ansible.com/ansible/latest/user_guide /playbooks_delegation.html
- Based somewhat on my own experience

Setup

Checkout the code

Clone the course material and sample code

git clone https://github.com/heytrav/ansible-workshop-2019.git

- or follow along on GitHub
 - README -> Course Outline
- ..or follow along in pdf in base directory

Installing Ansible

- For this workshop we'll be using Ansible ≥ 2.8
- Installation options

Setup Python virtualenv

- Requirements
 - ≥ python3.5
 - virtualenv
- Set up local Python environment

```
virtualenv -p `which python3` venv
```

Activate virtualenv as base of Python interpreter

```
source ~/venv/bin/activate
```

Install Dependencies

Update Python package manager (pip)

```
pip install -U pip
```

Install dependencies

```
pip install -r requirements.txt
```

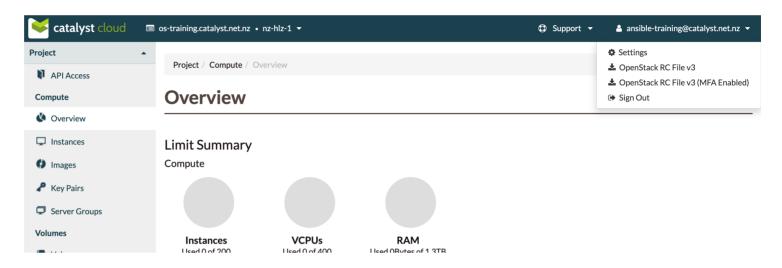
Cloud Provider Account

Catalyst Cloud Registration

- Open https://dashboard.cloud.catalyst.net.nz
- Sign up for an account
- Enter promo code
 - TODO: enter promo code here

Download OpenStack credentials

In upper right corner under your account name



Download OpenStack RC File v3

OpenStack SDK login

- Your terminal will need to be logged in to interact with OpenStack on the Catalyst Cloud
- Activate the OpenStack config in your terminal
- This will prompt you to enter your Catalyst Cloud password

```
source <your account name>.catalyst.net.nz-openrc.sh
Please enter your OpenStack Password for project ...
******
```

Ansible Basics

(quick review)

Terminology

Task

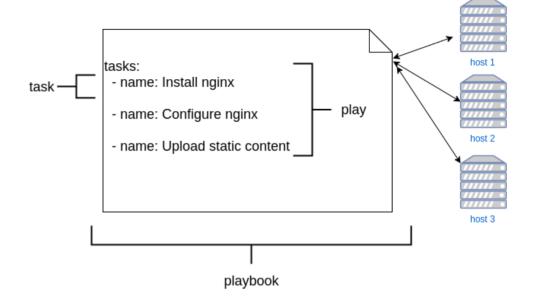
An action to perform

Play

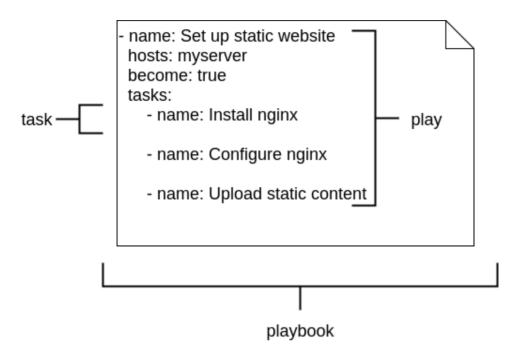
a collection of tasks

Playbook

YAML file containing one or more plays



Ansible Playbook Structure



- A playbook is a YAML file containing a list of plays
- A play is a dictionary object

Ansible Playbook Structure

- A play must contain:
 - hosts
 - A string representing a particular host or *group* of hosts

```
o hosts: localhost
```

∘ hosts: app.mywebsite.com

∘ hosts: appserver

These are what you will configure

Ansible Playbook Structure

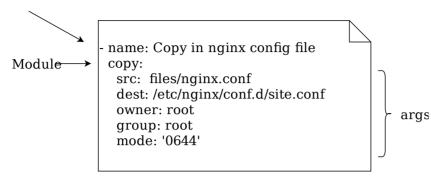
- A play may optionally contain:
 - tasks
 - A list of dictionaries
 - What you want to do
 - name
 - Description of the play
 - vars
 - Variables scoped to the play

Structure of a Task

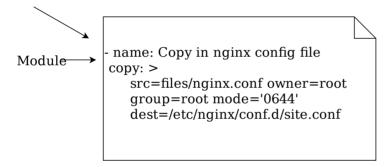
- A task is a dictionary object containing
 - name
 - Describes what the task does
 - Optional but best practice to use
 - module
 - Dictionary object
 - Key represents Python module which will perform tasks
 - May have arguments

Structure of a Task

Description of task



Description of task



- Two styles of module object in tasks
 - string form
 - dictionary form
- Dictionary form is more suitable for complex arguments
- Matter of preference/style

More Terminology

Module

Blob of Python code which is executed to perform task

Inventory

File containing hosts and groups of hosts to run tasks

YAML and indentation

- Ansible is fussy about indentation
- TABS not allowed (Ansible will complain)
- Playbook indentation

```
- name: This is a play
hosts: somehosts  # 2 spaces
tasks:
- name: This is a task  # 4 spaces
module:  # 6 spaces
attr: someattr  # 8 spaces
attr1: someattr
attr2: someattr
```

Task file indentation

```
- name: This is a task

module: somehosts  # 2 spaces

attr1: value1  # 4 spaces

attr2: value2  # 4 spaces

attr3: value3  # 4 spaces

loop: "{{ list_of_items }}"  # 2 spaces
```

• Use an editor that supports YAML syntax

Vim YAML setup

• .vimrcfile

```
syntax on filetype plugin indent on
```

• ~/.vim/after/ftplugin/yaml.vim

```
set tabstop=2 "Indentation levels every two columns
set expandtab "Convert all tabs that are typed to spaces
set shiftwidth=2 "Indent/outdent by two columns
set shiftround "Indent/outdent to nearest tabstop
```

Project Layout

```
ansible
├─ files

    □ rsyslog-haproxy.conf

    group_vars
      – all/
      appcluster.yml
      - app.yml
      bastion.yml
      - cluster/
      - db.yml
      - loadbalancer/
      - private_net.yml
      publichosts.yml
      — web.yml
   inventory
    ├─ cloud-hosts
    — openstack.yml
   lb-host.yml
    app-blue-green-upgrade.yml
  app-rolling-upgrade.yml
  - blue-green-start-switch.yml
  - deploy.yml
   provision-hosts.yml
```

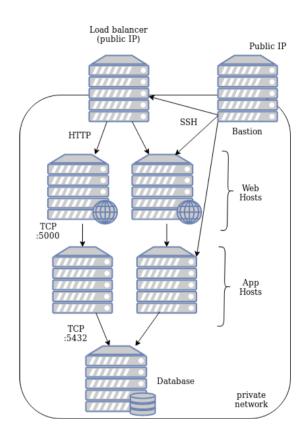
Provisioning Hosts

Creating Our Cluster

- For this tutorial we are going to need seven machines
 - 2 for nginx web server
 - 2 for our web application
 - 1 database host
 - 1 load balancer
 - 1 bastion
- Seems like a lot, but we are trying to simulate upgrades across a cluster

Our cluster

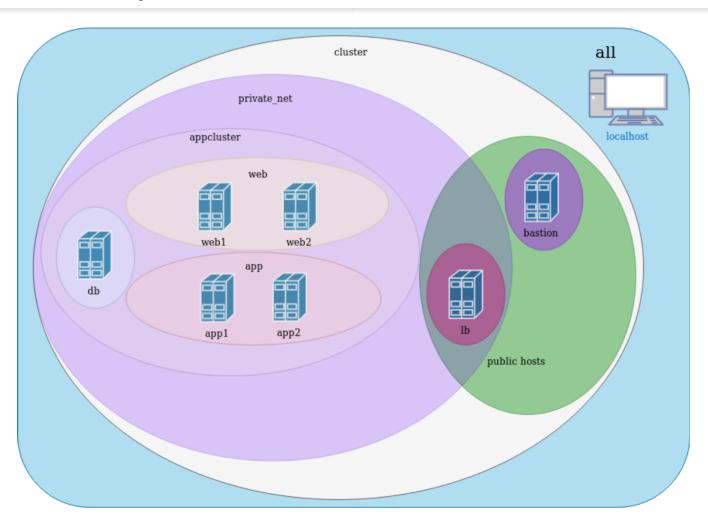
- HTTP traffic reaches web hosts via load balancer
- Application receives traffic from web hosts on port 5000
- DB receives traffic from app hosts on 5432
- SSH traffic
 - only bastion reachable from outside
 - all other hosts only SSH from bastion



Inventory Host Grouping

• Architecture defined using Ansible groups

ansible/inventory/cloud-hosts



Host Inventory

Inventory and groups fundamental to deploying and configuring

```
hosts: web
```

```
localhost ansible_connection=local ansible_python_interpreter="/usr/bin/env
[appcluster]
pycon-web[1:2]
pycon-app[1:2]
pycon-db
[loadbalancer]
pycon-lb
[bastion]
pvcon-bastion
pycon-web[1:2]
[db]
pycon-db
[app]
pycon-app[1:2]
[publichosts:children]
bastion
loadbalancer
[private_net:children]
appcluster
loadbalancer
[cluster:children]
bastion
loadbalancer
appcluster
```

The provision-hosts.yml playbook

- Tasks in the first play are executed on local machine
- We need to tell Ansible names of hosts we want to create

```
name: Provision a set of hosts in Catalyst Cloud
hosts: localhost
gather_facts: false
vars:
    # ADD host_set and security groups
host_set: "{{ groups.cluster }}"
security_groups: "{{ host_set | map('extract', hostvars, 'security_groups') | sum(start=[]) | list | unique }}"
security_group_names: "{{ security_groups | map(attribute='group') | list | unique }}"
tasks:
```

- Extract security groups for specific hosts from inventory
- Add the 3 variables under the comment to the vars dictionary

Cloud Modules

- Cloud deployments typically involve creating resources with a provider
 - Instances
 - Networks
 - Security groups, acls, etc
- We are using OpenStack Modules
 - The modules that start with os

Setting up cloud resources

- Behind the scenes using the OpenStack API
 - same endpoints used by openstacksdk CLI
- Boilerplate for creating multiple cloud hosts
 - log in to cloud provider
 - create router, network, security groups
 - create each host

Using OpenStack cloud modules

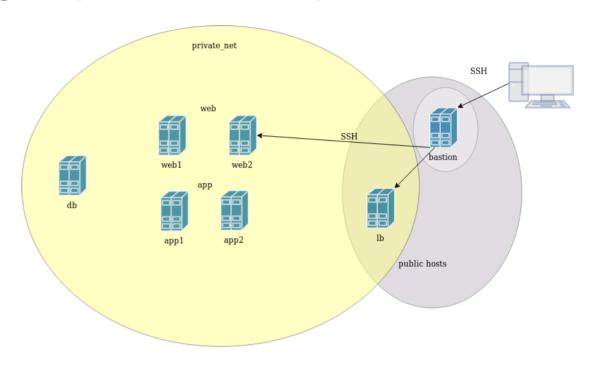
 The first play uses cloud modules to create objects on your tenant

```
    name: Provision a set of hosts in the Catalyst Cloud hosts: localhost gather_facts: false tasks:

            name: Connect to Catalyst Cloud os_auth:
             name: Create keypair os_keypair:
             name: Create network os_network:
             name: Create cluster instances os_server:
```

Using Ansible via a bastion host

- Hosts in private_net group do not have public IP
- Only bastion is directly accessible by SSH
- All other hosts can only be reached from bastion



Traversing a bastion host

- Ansible relies on SSH to talk to remote hosts
- Just need to pass SSH arguments for hosts in private_net group
- Use add_host to assign ansible_ssh_common_args

```
# ADD SSH args
- name: Set ssh args for bastion
 add host:
    name: "{{ item.openstack.name }}"
    ansible ssh common args: "-o StrictHostKeyChecking=no -o ForwardAgent=yes"
 loop: "{{ launch.results }}"
  when: item.openstack.name in groups.bastion
- name: Set ssh args for rest of cluster
 add host:
    name: "{{ item.openstack.name }}"
    ansible_ssh_common_args: >
     -o StrictHostKeyChecking=no
     -o ForwardAgent=yes
      -o ProxyCommand='ssh {{ hostvars[item.openstack.name].ansible_user }}@{{ hostvars[groups.bastion[0]].ansible_host }} exec nc -w300 %h %p'
 loop: "{{ launch.results }}"
 when: item.openstack.name in groups.private_net
```

Additional setup for hosts

- Edit / etc/hosts on each host
 - bastion host to resolve all hosts in cluster for SSH
 - web to resolve app host
 - app host to resolve db
- Set NZ locale, timezone, etc.

Resolving for SSH

Add following to provision-hosts.yml

```
# ADD bastion -> private_net for SSH
- name: Set up the bastion host mapping
hosts: bastion
become: true
tasks:
    - name: Add entry to /etc/hosts for all instances
    lineinfile:
        dest: /etc/hosts
        line: "{{ hostvars[item].ansible_host }} {{ item }}"
    with_items: "{{ groups.private_net }}"
```

Resolving application services

 Set up resolution for application components (i.e. nginx and application)

```
# ADD web -> app for proxy pass
- name: Set up web hosts with mapping to backend
  hosts: web
  become: true
  tasks:
    - name: Map each frontend host to speak to a specific backend
     lineinfile:
        dest: /etc/hosts
        line: "{{ hostvars[groups.app[(group_index | int) - 1]].ansible_host }} backend"
# ADD app -> db for application
- name: Add mapping for db on app boxes
  hosts: app
  become: true
  tasks:
    - name: Map each app host to speak to db
     lineinfile:
        dest: /etc/hosts
        line: "{{ hostvars[item].ansible_host }} {{ item }}"
      with_items: "{{ groups.db }}"
```

Set up locale and timezone

```
# ADD locale and timezone
- name: Set locale and local timezone
hosts: cluster
become: true
tasks:
- name: Add NZ locale to all instances
locale_gen:
    name: en_NZ.UTF-8
    state: present
- name: Set local timezone
timezone:
    name: Pacific/Auckland
```

Provisioning Hosts

Start the provisioning playbook

ansible-playbook -i ansible/inventory/cloud-hosts ansible/provision-hosts.yml

- Should take a few minutes to set up cluster
- In case task fails with SSH error just hit CTRL C and restart

ansible-inventory

- Useful to gather info about hosts
 - public IP
 - groups
- Can use ansible-inventory to gather info about cluster

```
ansible-inventory --list
ansible-inventory --host pycon-bastion
```

Pipe output through tools like jq

Get bastion IP

 We'll need the bastion IP if we want to SSH into hosts in the cluster

```
ansible-inventory --host pycon-bastion | jq '{"publicIP": .openstack.public_v4}'

{
    "publicIP": "202.49.242.143"
}
```

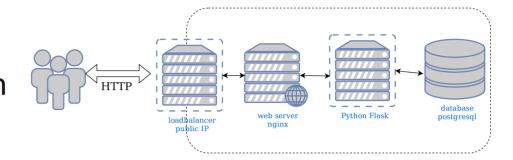
Use this to SSH into cluster

```
ssh -A -t ubuntu@202.49.242.143 ssh pycon-web1
```

Deploying the application

Deploying our application

- The deploy.yml playbook sets up our application
 - Web server running nginx
 - App server running a Python Flask



- Postgresql Database
- HA proxy

Overview of deploy playbook

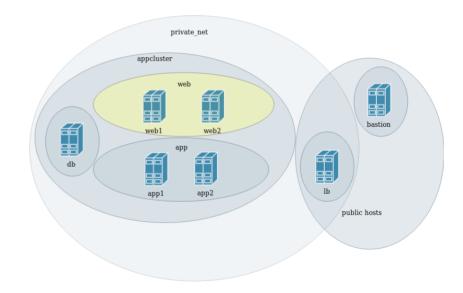
 ansible-playbook --list-tasks <playbook gives an overview of plays and tasks

Role of Inventory and Groups

hosts attribute influences which hosts Ansible interacts with

```
hosts: web
```

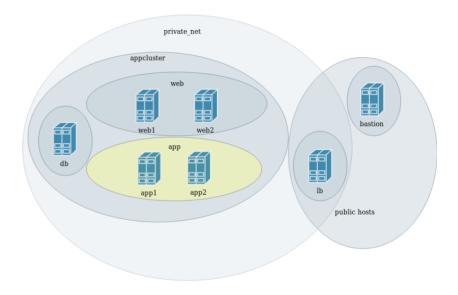
• This will interact with all hosts in the web group



Role of Inventory and Groups

hosts: app

This will interact with all hosts in the app group



Deploying the application

Run the deploy playbook

```
ansible-playbook ansible/deploy.yml
```

 Once deploy is finished you'll need the IP of your loadbalancer

```
ansible-inventory --host pycon-lb | jq '{"publicIP": .openstack.public_v4}'
```

Should be able to open in your browser as:

```
http://<public ip>.xip.io/
```

Viewing HAProxy stats

 HAProxy provides an overview of active web hosts in cluster

```
http://<public ip>.xip.io/haproxy?stats
```

Login details

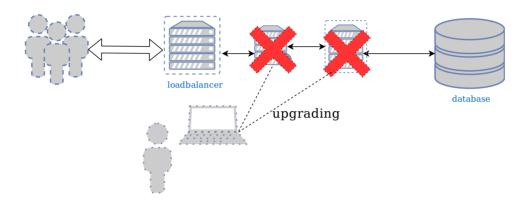
user: admin

password: train

Upgrade strategies

What can go wrong?

 Without some kind of redundancy, we risk of disrupting entire operation



Ideal upgrade scenario

- Minimal or zero downtime during upgrade of application
- Do not deploy a broken version of our application

Upgrade Strategies

- In-place rolling upgrade
- Blue-Green

In-place rolling upgrade

- Traditional approach to upgrading applications across a cluster
 - Creating new infrastructure can be prohibitively expensive
- Operates on infrastructure that already exists
- Minimise downtime by upgrading parts of the cluster at a time

Upgrading applications

ansible-playbook ansible/app-rolling-upgrade.yml -e app_version=v

At the moment there is no real difference to running

```
ansible-playbook ansible/deploy.yml -e app_version=v2 --limit app
```

- Tempting to just rely on idempotent behaviour to do the right thing
- There are two problems with this approach
 - Ansible's default batch management behaviour
 - deploy.yml does not check health of application

Default batch management behaviour

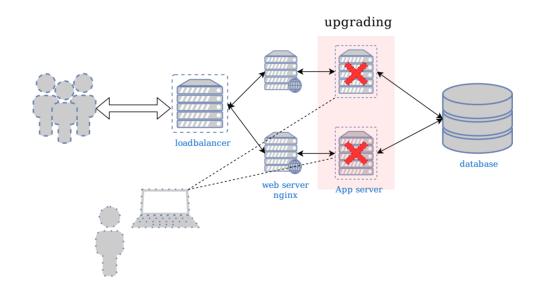
- By default runs each task on all hosts concurrently
- A failed task might leave every host in cluster in a broken state

Tasks	Host1	Host2
task1	ok	ok
task2	ok	ok
task3	fail	fail
task4	-	-

Deploying broken code

- Broken code may not be obvious in task
- *One task leaves application in a broken state
- Run the rolling upgrade playbook with app_version=v3

Tasks	Host1	Host2
task1	ok	ok
task2	ok	ok
task3*	ok	ok
task4	ok	ok



Fixing the batch problem

- The serial attribute can be added to the play attributes
- Determines batch size Ansible will operate in parallel
 - integer

```
∘ serial: 1
```

∘ serial: 3

percentage of cluster

∘ serial: 50%

Controlled batch size

Running with serial attribute set to 1

Tasks	Host1	Host2
task1	ok	ok
task2	ok	ok
task3	ok	ok
task4	ok	ok

Using serial in our upgrade

- Run the app-rolling-upgrade.yml playbook again with -e app_version=v1
- Update app-rolling-upgrade.yml as follows:

```
- name: Upgrade application in place become: true hosts: app # Serial attribute serial: 1
```

Try again with -e app_version=v3

Deploying broken code

Deploying app_version=v3 still breaks the application

Tasks	Host1	Host2
task1	ok	ok
task2	ok	ok
task3*	ok	ok
task4	ok	ok

Reset the environment

• Before we proceed, please reset your environment

ansible-playbook ansible/app-rolling-upgrade.yml -e app_version=v1

Failing fast

- Need to detect broken application and stop deployment
- Verify app is running after upgrade
- The Flask web application that runs on app server listens on port 5000
- Can use wait_for to stop and listen for port to be open before proceeding

Listen on port

• Add following to app-rolling-upgrade.yml

```
# ADD wait for 5000
- name: Make sure gunicorn is accepting connections
wait_for:
   port: 5000
   timeout: 60
```

 We're still missing something so don't run the playbook yet!

Flushing handlers

- The application may not have loaded new configuration
- We need to force handler to restart gunicorn before waiting on port
- Add following to app-rolling-upgrade.yml

```
# ADD flush handlersmeta: flush_handlers
```

Now re-run the playbook with -e app_version=v3

Failing fast

 Playbook stops execution on first host when check on port fails

Tasks	Host1	Host2
task1	ok	-
task2	ok	-
restart gunicorn*	ok	-
wait_for	fail	-

Load balancing and upgrades

- During an upgrade we change configuration and restart the application
- Downtime might be disruptive to users of website
- Following update with app_version=v3 half of the cluster is broken

```
curl --head http://<public ip>.xip.io
HTTP/1.1 502 Bad Gateway
```

Reset the environment

• Before we proceed, please reset your environment

ansible-playbook ansible/app-rolling-upgrade.yml -e app_version=v1

Avoiding disruptions

- Ideally the loadbalancer should not send traffic to the hosts(s) we are updating
- While upgrading app host, need to disable traffic to upstream web host

Host Context

• The hosts: attribute of a play determines context

```
- name: Play on app host
hosts: app
```

- While on host app1, we can call all inventory variables by name, i.e.
 - ansible_host
- If we want variable for a different host, must use hostvars
 - hostvars['otherhost'].ansible_host

Delegation

- Sometimes need to configure one host in the context of another host
- Run a command on server B using inventory from A
 - enable/disable web hosts at the load balancer
- The delegate_to directive is useful for this

Using delegation

• We want to disable host we're updating on pycon-lb

```
# ADD disable application at lb
- name: Disable application at load balancer
haproxy:
   backend: catapp-backend
   host: "{{ web_server }}"
   state: disabled
delegate_to: "{{ item }}"
loop: "{{ groups.loadbalancer }}"
```

Enabling host at loadbalancer

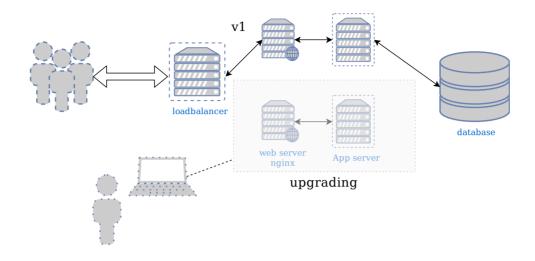
 When we are sure the app is running, we need to reenable traffic to the host

```
# ADD enable application at lb
- name: Re-enable application at load balancer
haproxy:
   backend: catapp-backend
   host: "{{ web_server }}"
   state: enabled
delegate_to: "{{ item }}"
loop: "{{ groups.loadbalancer }}"
```

In Place Rolling Upgrade

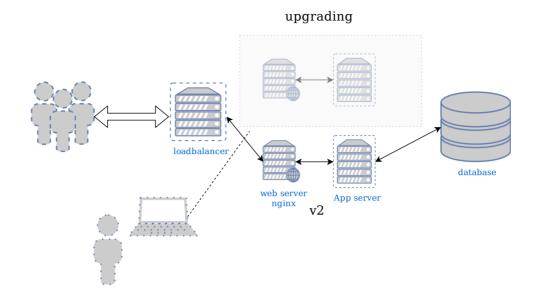
- Run playbook with app version=
 - **■** ∨1
 - **v**2
 - **■** ∨3
- During upgrades
 - curl site url from terminal
 - check HAProxy stats
- Upgrade to v3 should not leave entire cluster (or part of site) broken

First step of in place upgrade



- Disable application at LB (no HTTP requests)
- Upgrade necessary applications, configuration
- Re-enable at LB

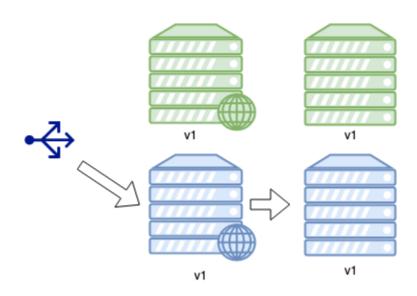
In place rolling upgrade



- Repeat process across pool
- Mixed versions will be running for a period of time

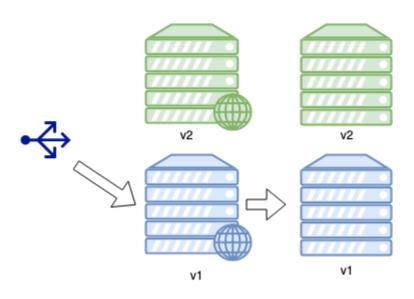
Blue Green Deployments

Blue Green Deployments



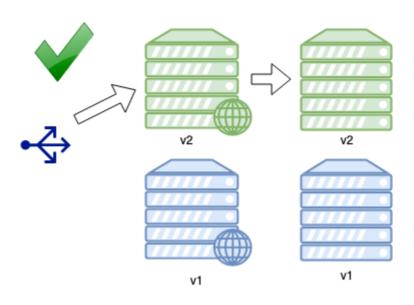
Start with all traffic going to blue hosts

Begin update



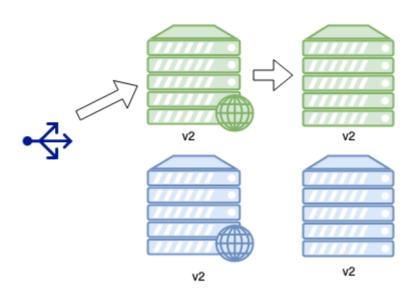
Update traffic on green hosts

Check green is ok



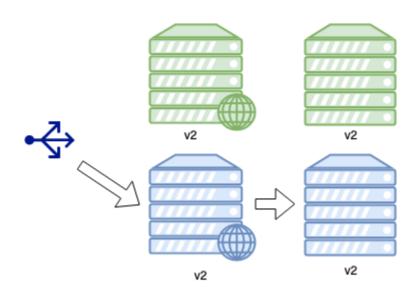
Direct traffic through green and verify ok

Update blue side of cluster



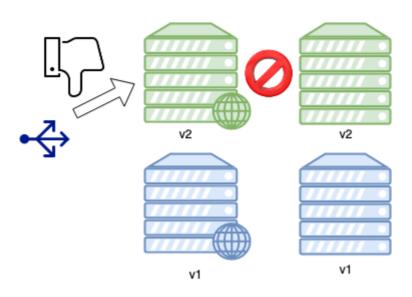
Ok, so update blue side

Reset traffic to blue



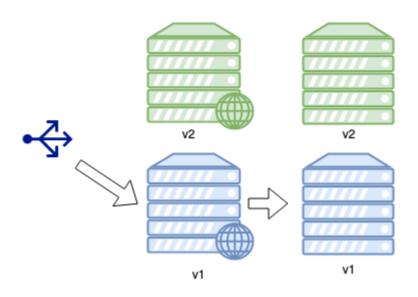
Reset traffic to blue side of cluster

Dealing with failure



Alternative if green app not healthy

Return to original state



Redirect traffic back to blue

Setting up Blue-Green

- We need to do is put our cluster in blue-green mode
- First reset our environment

```
ansible-playbook ansible/app-rolling-upgrade.yml -e app_version=v1
```

Run the following playbook:

```
ansible-playbook ansible/setup-blue-green.yml -e live=blue
```

Verify half of cluster active on HAProxy stats page

Blue green update playbook

For blue green we will use the following playbook

```
ansible/app-blue-green-upgrade.yml
```

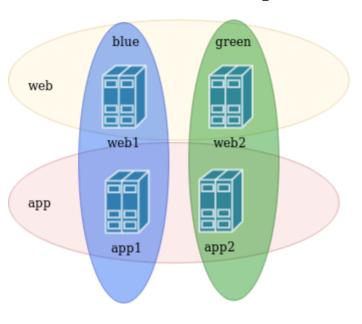
In our inventory

```
# ansible/inventory/cloud-hosts
[blue]
pycon-web1
pycon-app1

[green]
pycon-web2
pycon-app2

[blue_green:children]
blue
green
```

Inventory and groups



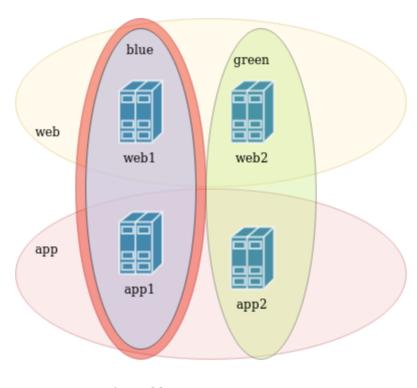
Ad hoc groups

- For blue-green we need to assign active and not active half of cluster
- Can assign groups of hosts to ad hoc groups
- By default we declare blue active
- Add following to app-blue-greenupgrade.yml

```
# ADD set active group
- name: Set live group as active
hosts: localhost
gather_facts: false
vars:
   active: "{{ groups[ live | default('blue') ] }}"
tasks:
   - name: Add active hosts to group
   add_host:
     name: "{{ item }}"
     groups:
        - active
   with_items: "{{ active | default(groups.blue_green) }}"
```

Operating on groups and subgroups

- The play we added creates an ad hoc group called active
- Initially equal to blue group
- We want to update hosts not in the active



active==blue

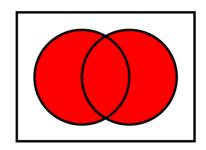
Group set theory

Ansible set theory operators

- The hosts attribute has syntax for set theory operations on inventory
- These enable fine control over which hosts playbooks operate

Union A u B

Combination of hosts in two groups



All hosts in web and db groups

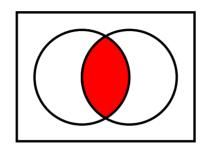
- name: Union of hosts

hosts: web:db

tasks:

Intersection A n B

Hosts that are in first and second group



Hosts that are in both the web and the blue group

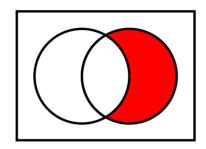
- name: Intersection of hosts

hosts: web:&blue

tasks:

Difference A\B

Set of hosts in first set but not in second set



Hosts that are in the *app* group **but not** in the *active* group

- name: Difference of groups

hosts: app:!active

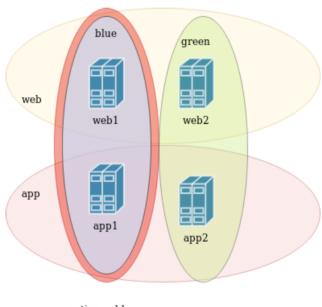
tasks:

Set operators and upgrade

- Update playbook similar to rolling upgrade example
- Update app in inactive part of cluster

```
# ADD set to update hosts: app:!active
```

Should update app2



active==blue

Verify app is running

Restart the app and verify it is listening on port

```
# ADD flush handlers and check port
- meta: flush_handlers
- name: Make sure gunicorn is accepting connections
   wait_for:
        port: 5000
        timeout: 60
```

Enabling traffic to green

 Use delegation to enable traffic to green at loadbalancer

```
# ADD enable traffic to inactive
- name: Enable traffic to updated app server
hosts: web:!active
become: true
tasks:
    - name: Enable application at load balancer
haproxy:
     backend: catapp-backend
     host: "{{ inventory_hostname }}"
     state: enabled
     delegate_to: "{{ item }}"
     loop: "{{ groups.loadbalancer }}"
```

Stop traffic to blue

Now disable blue side at loadbalancer

```
# ADD disable traffic to active side
- name: Stop traffic to initial live group
hosts: web:&active
become: true
tasks:
   - name: Disable application at load balancer
haproxy:
    backend: catapp-backend
    host: "{{ inventory_hostname }}"
    state: disabled
    delegate_to: "{{ item }}"
    loop: "{{ groups.loadbalancer }}"
```

Run blue green upgrade

• Let's run the blue green upgrade playbook

```
ansible-playbook ansible/app-blue-green-upgrade.yml -e app_version=v2
```

Can switch back to blue active by running

```
ansible-playbook ansible/setup-blue-green.yml -e live=blue
```

Try running upgrade with v3 and v4

Additional check

- May want to make additional checks on site
- v4 works but does not display version on site
- Add additional check to play

```
# ADD check version display
- name: Check that the site is reachable via nginx
uri:
    url: "http://{{ ansible_host }}:5000"
    status_code: 200
    return_content: yes
    headers:
        HOST: my-app.cats
    register: app_site
    failed_when: "'version: ' + app_version not in app_site.cc
    delegate_to: "{{ web_server }}"
```

The End

Please do not forget to clean up your clusters!

ansible-playbook ansible/remove-hosts.yml