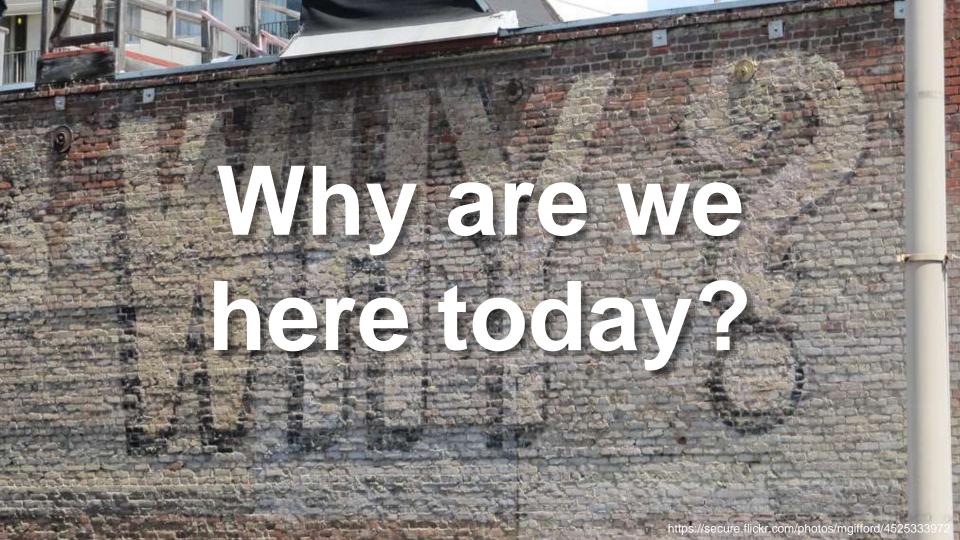


DevOps on AWS Deep Dive on Infrastructure as Code

Hubert Cheung, Solutions Architect

September 2016





Why are we here today?

Moving to cloud based infrastructure opens doors to building and managing infrastructure in completely new ways:

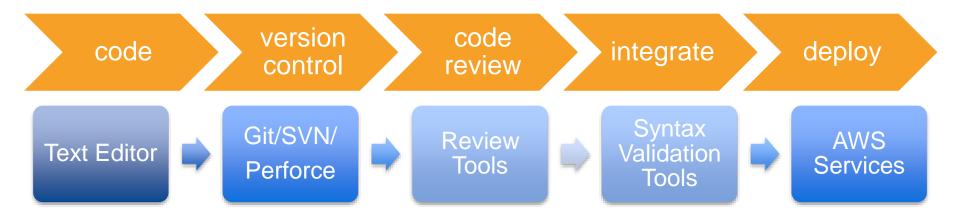
- Infrastructure can be provisioned in seconds
- Scale can be achieved without complicated capacity planning
- Being API driven means we can interact with our infrastructure via languages typically used in our applications

Infrastructure as Code is a practice by where traditional infrastructure management techniques are supplemented and often replaced by using code based tools and software development techniques.

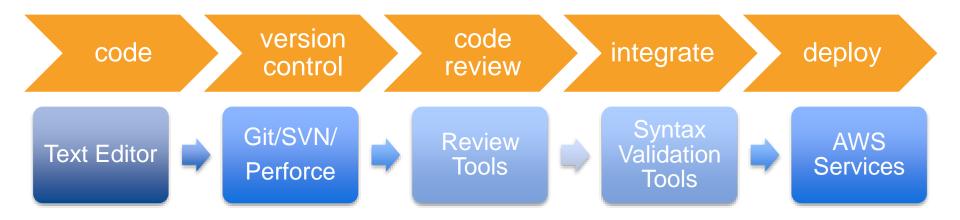
Infrastructure as Code workflow



Infrastructure as Code workflow



Infrastructure as Code workflow



"It's all software"

"It's all software"

Application Configuration

Operating System and Host Configuration

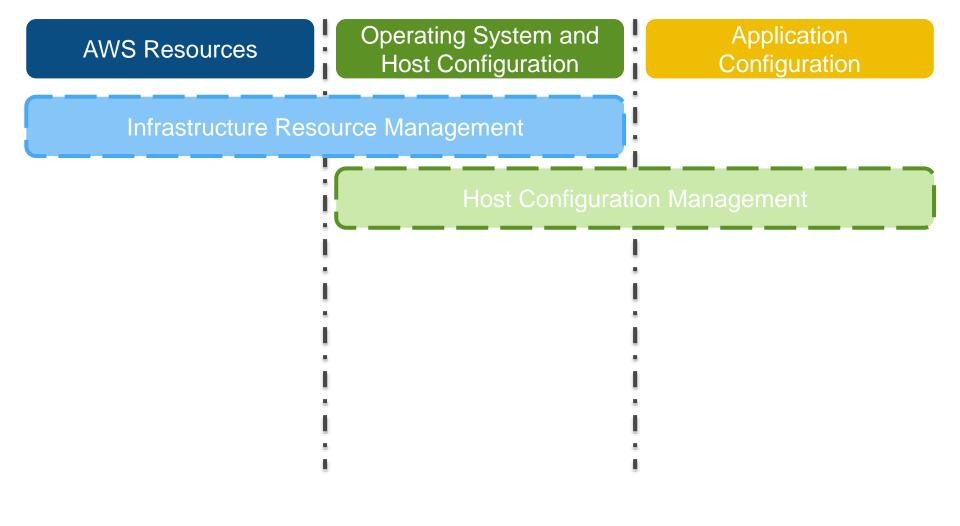
AWS Resources

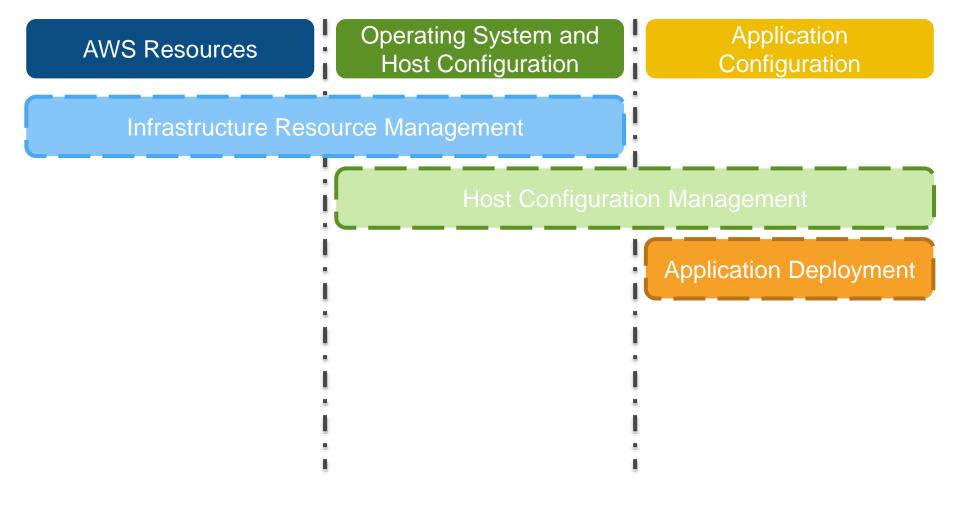
Operating System and Application **AWS Resources Host Configuration** Configuration AWS Resources

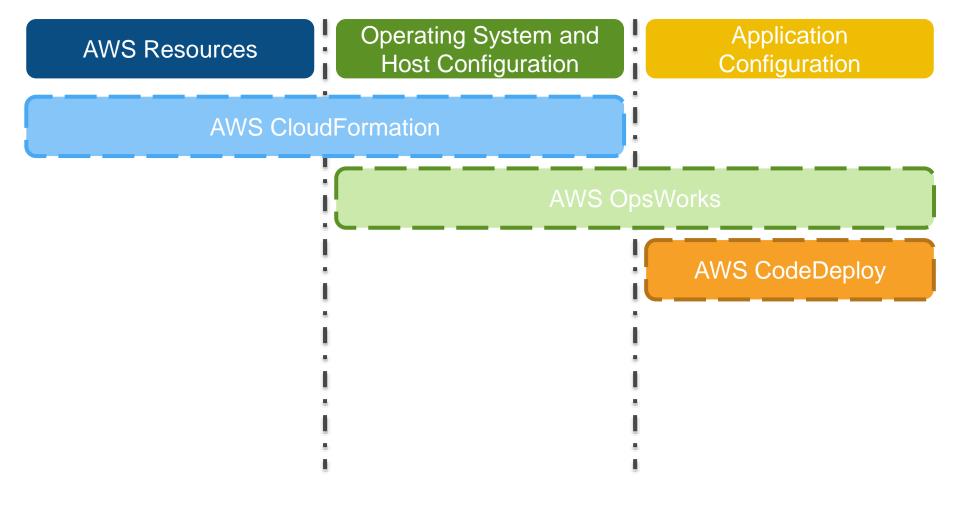
Operating System and Host Configuration

Application Configuration

Infrastructure Resource Management







AWS Resources

Operating System and **Host Configuration**

Application Configuration

AWS CloudFormation

Amazon Virtual Private Cloud (VPC) Amazon Elastic Compute Cloud (EC2) **AWS Identity and Access** Management (IAM) Amazon Relational Database Service (RDS) Amazon Simple Storage Service (S3) AWS CodePipeline

Windows Registry **Linux Networking** OpenSSH LDAP

AD Domain Registration

Centralized logging

System Metrics

Deployment agents

Host monitoring

AWS CodeDeploy

Application dependencies

Application configuration

Service registration

Management scripts

Database credentials





Create templates of your infrastructure

CloudFormation provisions AWS resources based on dependency needs

Version control/replicate/update templates like code

Integrates with development, CI/CD, management tools

Launched in 2010

CloudFormation – Components & Technology



JSON formatted file

Parameter definition
Resource creation
Configuration actions

Framework

Stack creation
Stack updates
Error detection and rollback

Configured AWS resources

Comprehensive service support
Service event aware
Customizable

Anatomy of a template

Declarative language

JSON

Perfect for Plain text version control JSON Validatable

```
"Description": "AWS CloudFormation Sample Template EC2InstanceSample: **WARNING** This template an Amazon EC2 instances. You will be billed for the AWS resources used if
you create a stack from this template.",
 "Parameters" : {
  "KeyName" : {
   "Description": "Name of an existing EC2 KeyPair to enable SSH access to the instance",
   "Type": "String"
  "Environment": {
   "Type" : "String"
   "Default": "Dev".
   "AllowedValues": ["Mgmt", "Dev", "Staging", "Prod"],
    "Description": "Environment that the instances will run in."
"Mappings" : {
  "RegionMap": {
   "us-east-1" : { "AMI" : "ami-7f418316" },
   "us-west-2" : { "AMI" : "ami-16fd7026" }
"Conditions": {
  "EnableEBSOptimized": {"Fn::Equals": [{"Ref": "Environment"}, "Prod"]},
 "Resources": {
  "Ec2Instance" : {
   "Type": "AWS::EC2::Instance",
   "Properties": {
    "KeyName" : { "Ref" : "KeyName" },
    "EbsOptimized": {"Fn::If":["EnableEBSOptimized", {"true"}, {"false"}]},
    "ImageId": { "Fn::FindInMap": [ "RegionMap", { "Ref": "AWS::Region" }, "AMI" ]},
    "UserData" : { "Fn::Base64" : "80" }
 "Outputs": {
  "InstanceId": {
   "Description": "Instanceld of the newly created EC2 instance",
   "Value": { "Ref": "Ec2Instance" }
  "PublicDNS": {
   "Description": "Public DNSName of the newly created EC2 instance",
   "Value": { "Fn::GetAtt": [ "Ec2Instance", "PublicDnsName" ] }
```

"AWSTemplateFormatVersion": "2010-09-09".

```
"Description": "AWS CloudFormation Sample Template EC2InstanceSample: **WARNING** This template an Amazon EC2 instances. You will be billed for the AWS resources used if
vou create a stack from this template.".
 "Parameters" : {
  "KevName" : {
   "Description": "Name of an existing EC2 KeyPair to enable SSH access to the instance".
   "Environment": {
   "Type": "String"
    "Default" : "Dev"
   "AllowedValues": ["Mgmt", "Dev", "Staging", "Prod"].
    "Description": "Environment that the instances will run in."
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  "RegionMap": {
   "us-east-1" : { "AMI" : "ami-7f418316" }
                 : { "AMI" : "ami-16fd7026" }
   "us-west-2"
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   "EnableEBSOptimized": {"Fn::Equals": [{"Ref": "Environment"}, "Prod"]}.
 "Resources" : {
  "Ec2Instance" : {
   "Type": "AWS::EC2::Instance",
   "Properties" : {
    "KeyName" : { "Ref" : "KeyName" },
    "EbsOptimized": {"Fn::If": [" EnableEBSOptimized", {"true"}, {"false"}]},
    "ImageId": { "Fn::FindInMap": [ "RegionMap", { "Ref": "AWS::Region" }, "AMI" ]},
    "UserData" : { "Fn::Base64" : "80" }
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   "Description": "Instanceld of the newly created EC2 instance".
   "Value": { "Ref": "Ec2Instance" }
  "PublicDNS": {
   "Description": "Public DNSName of the newly created EC2 instance",
   "Value": { "Fn::GetAtt": [ "Ec2Instance", "PublicDnsName" ] }
```

"AWSTemplateFormatVersion": "2010-09-09".

HEADERS

PARAMETERS

MAPPINGS CONDITIONALS

RESOURCES

OUTPUTS

Description of what your stack does, contains, etc. **HEADERS** Provision time values that add structured flexibility and **PARAMETERS** customization **MAPPINGS** Pre-defined conditional case statements Conditional values set via evaluations of passed references CONDITIONALS **RESOURCES** AWS resource definitions **OUTPUTS** Resulting attributes of stack resource creation

Templates (in action):

```
"ImageId": { "Fn::FindInMap": [ "AWSRegionVirt2AMI", { "Ref": "AWS::Region" }, { "Fn::FindInMap": ["AWSInstanceType2Virt", { "Ref": "myInstanceType" }, "Virt"]} ]},
```

"AWSRegionVirt2AMI" Map

Templates (in action):

```
"ImageId": { "Fn::FindInMap": [ "AWSRegionVirt2AMI", { "Ref": "AWS::Region" }, { "Fn::FindInMap": ["AWSInstanceType2Virt", { "Ref": "myInstanceType" }, "Virt"]} ]},
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"AWSRegionVirt2AMI" Map

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```

"AWSInstanceType2Virt" Map

"AWSRegionVirt2AMI" Map

Templates (in action):

```
"ImageId": { "Fn::FindInMap": [ "AWSRegionVirt2AMI", { "Ref": "AWS::Region" }, { "Fn::FindInMap": ["AWSInstanceType2Virt", { "Ref": "myInstanceType" }, "Virt"]} ]},

"myInstanceType"

"AWSInstanceType2Virt" Map Parameter
```

"AWSRegionVirt2AMI" Map

Templates (in action):

AWS::Region Pseudo

Parameter

```
"ImageId": { "Fn::FindInMap": [ "AWSRegionVirt2AMI", { "Ref": "AWS::Region" }, { "Fn::FindInMap": ["AWSInstanceType2Virt", { "Ref": "myInstanceType" }, "Virt"]} ]},

"AWSInstanceType2Virt" Map

"myInstanceType"
Parameter
```

Parameters:

```
"myInstanceType" : {
    "Type" : "String",
    "Default" : "t2.large",
    "AllowedValues" : ["t2.micro", "t2.small",
"t2.medium", "t2.large"],
    "Description" : "Instance type for instances created,
must be in the t2 family."
```

Mappings:

```
"AWSInstanceType2Virt": {
    "t2.micro": {"Virt": "HVM"},
    "t2.small": {"Virt": "HVM"},
    "t2.medium": {"Virt": "HVM"},
    "t2.large": {"Virt": "HVM"},
}
```

Mappings:

```
"AWSRegionVirt2AMI": {
     "us-east-1": {
       "PVM": "ami-50842d38",
        "HVM": "ami-08842d60"
     "us-west-2": {
        "PVM": "ami-af86c69f",
        "HVM": "ami-8786c6b7"
     "us-west-1": {
        "PVM": "ami-c7a8a182",
        "HVM": "ami-cfa8a18a"
```

Bootstrapping Applications & Handling Updates

Option 1: Use EC2 UserData, which is available as a property of AWS::EC2::Instance resources

```
"Resources" : {
    "Ec2Instance" : {
      "Type" : "AWS::EC2::Instance",
      "Properties" : {
        "KeyName" : { "Ref" : "KeyName" },
        "SecurityGroups" : [ { "Ref" : "InstanceSecurityGroup" } ],
        "ImageId" : { "Fn::FindInMap" : [ "RegionMap", { "Ref" : "AWS::Region" }, "AMI" ]},
        "UserData" : { "Fn::Base64" : { "Fn::Join" : ["",[
            "#!/bin/bash -ex","\n",
            "yum -y install gcc-c++ make", "\n",
            "yum -y install mysql-devel sqlite-devel","\n",
            "yum -y install ruby-rdoc rubygems ruby-mysql ruby-devel", "\n",
            "gem install --no-ri --no-rdoc rails","\n",
            "gem install --no-ri --no-rdoc mysql","\n",
            "gem install --no-ri --no-rdoc sqlite3","\n",
            "rails new myapp", "\n",
            "cd myapp","\n",
            "rails server -d","\n"]]}}
```

Bootstrapping Applications & Handling Updates

Option 2: AWS CloudFormation provides helper scripts for deployment within your EC2 instances



Cfn-init reads this metadata key and installs the packages listed in this key (e.g., httpd, mysql, and php). Cfn-init also retrieves and expands files listed as sources.

Use AWS::CloudFormation::Init with cfn-init to help bootstrap instances:

```
"Metadata": {
  "AWS::CloudFormation::Init" : {
        "config" : {
          "packages" : {
          "sources" : {
          "commands" : {
          "files" : {
          "services" : {
          "users" : {
          "groups" : {
```

Install packages with the native package management tool:

```
"WebAppHost" : {
      "Type" : "AWS::EC2::Instance",
      "Metadata" : {
        "AWS:CloudFormation::Init" : {
            "config" : {
                "packages" : {
                     "yum" : {
                     "gcc" : [],
                     "gcc-c++" : [],
                     "make" : [],
                     "automake" : [],
```

Manage a wide range of AWS services & resources

- Amazon EC2
- Amazon EC2 Container Service
- Amazon EC2 Simple Systems Manager (New)
- > AWS Lambda (including event sources)
- ➤ Auto Scaling (including Spot Fleet)
- > Amazon VPC
- ➤ Elastic Load Balancing
- > Amazon Route 53
- Amazon CloudFront
- > AWS WAF (New)
- > Amazon RDS
- > Amazon Redshift
- > Amazon DynamoDB
- Amazon ElastiCache
- > Amazon RDS (including Aurora)
- > Amazon S3

- Amazon IAM (including managed policies)
- > Amazon Simple AD / Microsoft AD (New)
- > Amazon Kinesis
- > Amazon SNS
- > Amazon SQS
- > AWS CloudTrail
- > Amazon CloudWatch
- > AWS Config (New)
- ➤ AWS Key Management Service (New)
- > AWS Data Pipeline
- > AWS Elastic Beanstalk
- > AWS OpsWorks
- > AWS CodeDeploy
- > AWS CodePipeline (New)
- > Amazon Workspaces

Many Stacks & Environments from One Template

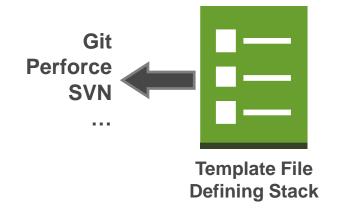


The entire infrastructure can be represented in an AWS CloudFormation template.

Defining Stack

Many Stacks & Environments from One Template

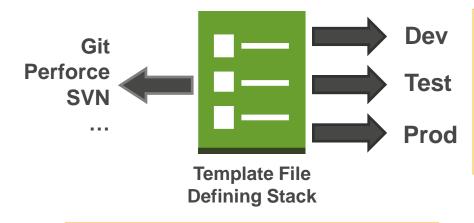
Use the version control system of your choice to store and track changes to this template



The entire infrastructure can be represented in an AWS CloudFormation template.

Many Stacks & Environments from One Template

Use the version control system of your choice to store and track changes to this template



Build out multiple environments, such as for Development, Test, Production and even DR using the same template

The entire infrastructure can be represented in an AWS CloudFormation template.

AWS CloudFormation

Versioning!

You track changes within your code

Do it within your infrastructure!

- What is changing?
- Who made that change?
- When was it made?
- Why was it made?(tied to ticket/bug/project systems?)

Self imposed, but you need to be doing this!

AWS CloudFormation

Testing:

- Validate via API/CLI
 - \$ aws cloudformation validate-template confirm CF syntax
 - Use something like Jsonlint (http://jsonlint.com/) to find JSON issues like missing commas, brackets!

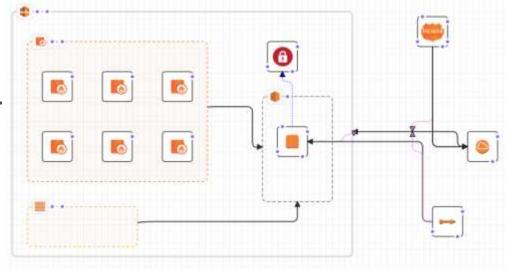
 Throw this into your testing/continuous integration pipelines!

AWS CloudFormation Designer

 Visualize template resources

 Modify template with dragdrop gestures

 Customize sample templates



AWS CloudFormation

Deploy & update via console or API/command line:

Just a couple of clicks

OR

 aws cloudformation create-stack --stack-name myteststack --template-body file:///home//local//test//sampletemplate.json -parameters
 ParameterKey=string,ParameterValue=string

But what do we do once things are up and running?

Ongoing Management

- Updates/patches?
- New software?
- New configurations?
- New code deploys?
- Pool specific changes?
- Environment specific changes?
- Run commands across all hosts?
- Be on top of all running resources?

Could we do this with AWS CloudFormation?

Sure! But potentially tricky to do at scale:

- Try changing a vhost configuration on every web server across multiple environments (dev, stage, prod)
- Install a package on certain hosts, but not others to test out newer versions
- Need to change LDAP config on every running Amazon EC2 Linux host, but they are across 25 different AWS CloudFormation templates?

We need a tool to interact with each host that we manage, to make our lives easier doing the previously mentioned tasks



AWS OpsWorks Configuration management solution for automating operational tasks

Model, control and automate applications of nearly any scale and complexity

Manage Linux and Windows the same way

Supports both AWS and on-premises

Launched in 2013

AWS OpsWorks



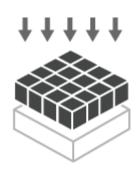
A **stack** represents the cloud infrastructure and applications that you want to manage together.



A **layer** defines how to setup and configure a set of instances and related resources.



Decide how to scale: manually, with **24/7** instances, or automatically, with **load-based** or **time-based** instances.



Then deploy your app to specific instances and customize the deployment with Chef recipes.

AWS OpsWorks Instance Lifecycle

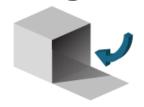


Agent on each instance understands a set of commands that are triggered by OpsWorks. The agent then runs Chef.

Setup



Configure



Deploy



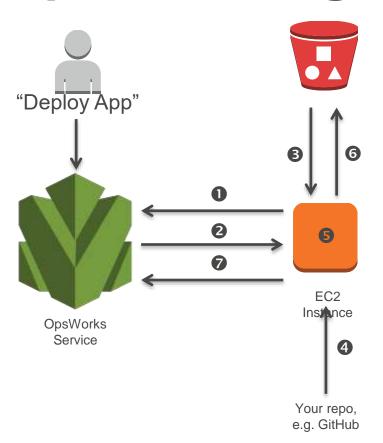
Undeploy



Shutdown



OpsWorks Agent Communication



- Instance connects with OpsWorks service to send keep alive heartbeat and receive lifecycle events
- 2. OpsWorks sends lifecycle event with pointer to configuration JSON (metadata, recipes) in S3 bucket
- 3. Download configuration JSON
- 4. Pull cookbooks and other build assets from your repo
- 5. Execute recipe
- 6. Upload Chef log
- 7. Report Chef run status

How OpsWorks Bootstraps the EC2 instance

Instance is started with IAM role

- UserData passed with instance private key, OpsWorks public key
- Instance downloads and installs OpsWorks agent

Agent connects to instance service, gets run info

- Authenticate instance using instance's IAM role
- Pick-up configuration JSON from the OpsWorks instance queue
- Decrypt & verify message, run Chef recipes
- Upload Chef log, return Chef run status

Agent polls instance service for more messages

AWS OpsWorks + Chef

OpsWorks uses Chef to configure the software on the instance

OpsWorks provides many Chef Server functions to users.

- Associate cookbooks with instances
- Dynamic metadata that describes each registered node in the infrastructure

Supports "Push" Command and Control Client Runs Support for community cookbooks



Working with Chef

Similar to CloudFormation and application code:

- Mixture of Json and a Ruby DSL
- Tools exist to do linting and syntax checking
- Versioning
 - Built in cookbook versioning
 - Some manual/processes scripted abilities
 - But still use source control!
- Tie in with continuous integration systems just like AWS CloudFormation and the rest of your code!

Working with Chef

Basics:

- Nodes
 - Roles
- Cookbooks
 - Recipes
- Attributes
- Data bags
- Environments

Host Configuration Management with Chef

Examples:

```
package "ntp" do
  action :install
end
service "ntpd" do
  supports :status => true, :restart => true,
:reload => true
  action [ :enable, :start ]
end
cookbook file "/etc/ntp.conf" do
    source "ntp.conf"
    owner "root"
    group "root"
   mode 00644
   # Restart ntp.conf if /etc/ntp.conf changes
    notifies :restart, resources(:service =>
"ntpd")
end
```

```
group "ganglia" do
  gid 499
end
user "ganglia" do
  home "/var/lib/ganglia"
  shell "/sbin/nologin"
 uid 499
  gid "ganglia"
end
directory "/etc/ganglia" do
  action :create
end
```

Host Configuration Management with Chef

Examples:

```
template "/etc/ganglia/gmond.conf" do
  source "gmond.conf.erb"
 owner "root"
 group "root"
 mode 00644
 notifies :restart, resources(:service => "gmond")
 variables(
    :gmetad name => node[:ganglia][:gmetad name],
    :cluster name => node[:ganglia][:cluster name]
end
cron "all-gmetrics" do
  command "for FILE in `ls /opt/bin/gmetric-*`; do command $FILE; done >/dev/null 2>&1"
end
```

Host Configuration Management with Chef

```
"opsworks": {
 "data bags": {
    "myapp": {
      "mysql": {
        "username": "default-user",
        "password": "default-pass"
```

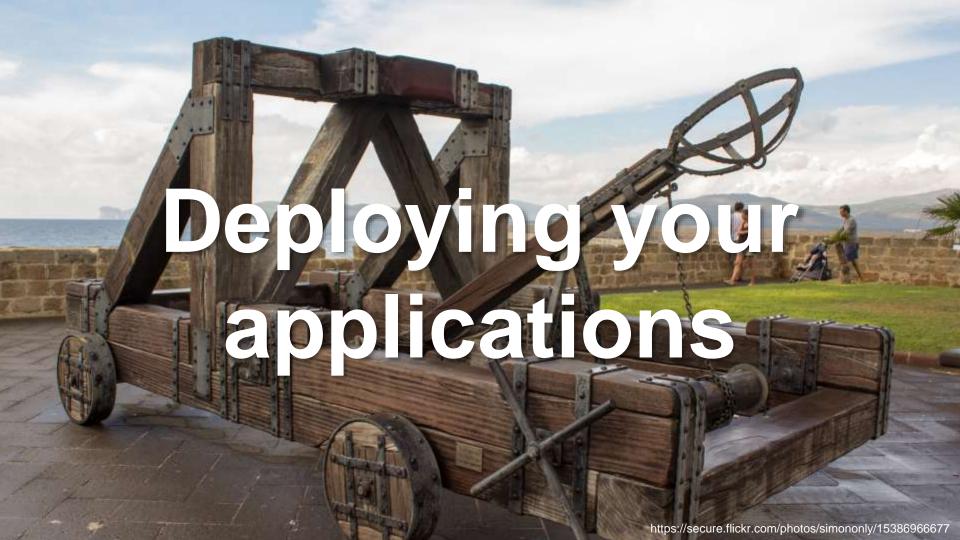
Custom JSON

```
mything = data_bag_item("myapp", "mysql")
Chef::Log.info("username: #{mything['username']}")
```

Recipe

AWS OpsWorks







Rolling deploys with zero downtime

Perform host management as part of a deploy

Deploy applications in any language on any Operating System

Deploy to any instance: AWS or on-premises

Treat all environments the same

Launched in 2014

appspec.yml Example

```
version: 0.0
os: linux
files:
  - source: /
    destination: /var/www/html
permissions:
  - object: /var/www/html
    pattern: "*.html"
    owner: root
    group: root
    mode: 755
hooks:
  ApplicationStop:
    - location: scripts/deregister from elb.sh
  BeforeInstall:
    location: scripts/install dependencies.sh
  ApplicationStart:
    - location: scripts/start_httpd.sh
 ValidateService:
    - location: scripts/test_site.sh
    location: scripts/register with elb.sh
```

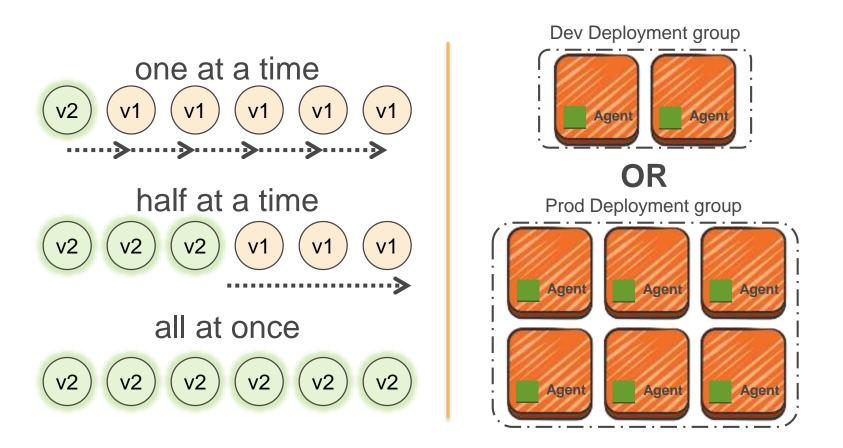
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  ApplicationStart:
    - location: scripts/start_httpd.sh
  ValidateService:
    - location: scripts/test_site.sh
    location: scripts/register with elb.sh
```

- Send application files to one directory and configuration files to another
- Set specific permissions on specific directories & files

- Remove/Add instance to ELB
- Install dependency packages
- Start Apache
- Confirm successful deploy
- More!

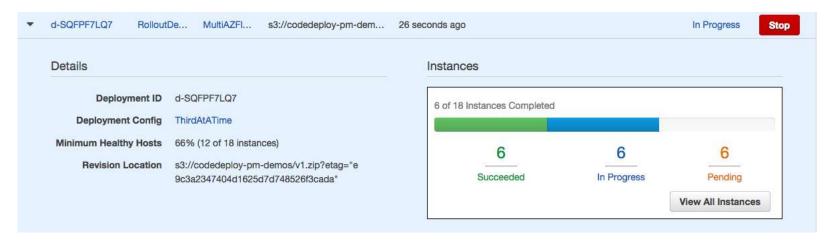
Choose deployment speed & group



Deploy!

AWS CLI & SDKs AWS Console AWS CodePipeline CI / CD Partners GitHub

```
aws deploy create-deployment \
--application-name MyApp \
--deployment-group-name TargetGroup \
--s3-location bucket=MyBucket,key=MyApp.zip
```





CloudFormation + OpsWorks + CodeDeploy!

- Create/update/manage AWS resources configuration and properties with CloudFormation
 - You can configure OpsWorks and CodeDeploy via CloudFormation
- Use OpsWorks for ongoing tweaks to software/configuration of host based applications and the operating system
 - You can configure and deploy CodeDeploy's agent with OpsWorks
- Use CodeDeploy to deploy your applications and their configurations

CloudFormation + OpsWorks + CodeDeploy!

- Your CloudFormation templates and Chef cookbooks should go in their own repositories
- Include appspec.yml file and related scripts in your application's code repositories
- Every commit should cause an execution of your continuous delivery pipeline to lint, validate and/or test
- Use each related service's CLI/console/APIs to update or deploy as necessary

AWS Resources

Operating System and Host Configuration

Application Configuration

AWS CloudFormation

Amazon Virtual Private Cloud (VPC) Amazon Elastic Compute Cloud (EC2) **AWS Identity and Access** Management (IAM) Amazon Relational Database Service (RDS) Amazon Simple Storage Service (S3) AWS CodePipeline

AWS OpsWorks

Windows Registry
Linux Networking
OpenSSH

LDAP

AD Domain Registration

Centralized logging

System Metrics

Deployment agents

Host monitoring

AWS CodeDeploy

Application dependencies

Application configuration

Service registration

Management scripts

Database credentials

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AWS Resources

Operating System and Host Configuration

Application Configuration

AWS CloudFormation

Amazon Virtual Private Cloud (VPC)

Amazon Flastic Coma Aws Coffee

Management (IAM)
Amazon Relational
Database Service (RDS)
Amazon Simple Storage
Service (S3)
AWS CodePipeline

AWS OpsWorks

Vince we Registry

Sort Decree

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AD Domain Registration Centralized logging

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Who is iTMethods?



- Founded in 2005 by Paul Goldman
 - ✓ Founder of Arqana Technologies. Built from 0 to \$75M. Acquired by TELUS (NYSE: TU)
- Customer Centric Partnership Approach
- Helping organizations execute their Digital Strategies
 - ✓ Deploy new, refactor and optimize existing applications on AWS
 - ✓ Streamline outcomes with Automation & DevOps
 - ✓ Certified Deploy/Migrate, Automate & Managed AWS Services
- Strategic Partnership with Amazon Web Services (AWS)
 - ✓ Certified AWS Managed Service Partner
 - ✓ Advanced Consulting Partner
 - ✓ Authorized Channel Reseller
 - ✓ Authorized Government Reseller, AWS Direct Connect Partner



User Story – An EHR Healthcare Provider

Customer Requirements:

Rapid Transition from on-premises infrastructure into AWS while leveraging HIPAA-eligible services

- On-premises infrastructure consists of:
 - 5+ critical application workloads
 - 30+ bare-metal Microsoft SQL Servers
 - Managed virtualized platform
- Managed entirely on a per-server basis (no fleet-management)
- Not currently using any automated software deployment mechanisms

- AWS Implementation
 - Designed for HIPAA compliance using secure design principles
- Deployed environment using Infrastructure as Code (Ansible/CloudFormation)
 - Leveraged HIPAA-eligible services, employing encryption and dedicated tenancy while enforcing strict change management processes
- CloudFormation invoked by Ansible to deploy redundant Microsoft SQL Enterprise Clusters
- Deployed entire Windows environment, including Active Directory and supporting components using Ansible

Value Provided by iTMethods

Achieved full infrastructure implementation and automation

- Leveraged Ansible and Cloudformation
- Full stack management of infrastructure and applications

Consolidated entire Infrastructure as Code deployment and management into single package

- Reduced the overhead for ongoing maintenance and changes
- Modular design of IaC package to enable distributed team-based efforts

Provide DevOps automation expertise for automated service deployment & management

But wait, there's more!

Resources to learn more:

- CloudFormation
 - https://aws.amazon.com/cloudformation/
 - https://aws.amazon.com/documentation/cloudformation/
 - https://aws.amazon.com/cloudformation/aws-cloudformation-templates/
- OpsWorks
 - https://aws.amazon.com/opsworks/
 - https://aws.amazon.com/documentation/opsworks/
 - https://github.com/aws/opsworks-cookbooks
- CodeDeploy
 - https://aws.amazon.com/codedeploy/
 - https://aws.amazon.com/documentation/codedeploy/
 - https://github.com/awslabs/aws-codedeploy-samples



Thank you!

