





# CONGA Overview General concepts and usage

PVTRAIN-145 Technical Training – wcm.io

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# About CONGA

**CONfiguration GenerAtor** 





## Yet Another Configuration Generator?

- A lot of configuration generator tools already exist
- IT Automation Tools like Ansible, Puppet, Chef have their own concepts and tools for generating configuration files from templates
- But: None of them knows the specialties of AEM, Sling and OSGi
- It's very quite hard to generate AEM-specific configuration with them because the target is **not a simple text-based format**
- We want a tool that is well-integrated with Maven and typical Java CI/CD infrastructures

## CONGA targets system configuration

- CONGA focuses on **System Configuration** that is usually defined at deployment time and is static at runtime.
  - It is not targeted to "runtime configuration" like site configuration, tenant configuration that can be changed at any time by authorized users
- CONGA is <u>not</u> a deployment automation tool it focuses only on configuration generation.
  - can be integrated in an automated deployment process
  - or used for manual or simple script-based deployment

## **CONGA** is flexible

- CONGA is **not limited to a specific type of application** or runtime environment, any system that relies on system configuration stored somewhere can be provisioned with this tool.
  - Typical target systems we had in mind when designing the tool are:
     AEM, AEM Dispatcher, Apache Tomcat and Apache HTTPd
- It **generates files** of any type, e.g.
  - Plain text files e.g. Properties, Scripts, Webserver configuration
  - JSON files
  - XMI files
  - OSGi configuration snippets
  - Sling Provisioning Model
  - AEM Content Packages containing OSGi configurations

## CONGA technology stack

- Implemented with Java 8
- Maven Plugin (standalone CLI available as well)
- Handlebars templating
- YAML files for role and environment definitions
- CONGA has a modular and plugin-based architecture
- Knowledge of new config formats can easily be added
- Generic formats like JSON and XML are supported out-of-the-box
- Plugins for Sling and AEM are provided





## **CONGA** is Open Source

- Apache 2.0 License
- Sources on Github: <a href="https://github.com/wcm-io-devops/conga">https://github.com/wcm-io-devops/conga</a>
- Documentation: <u>http://devops.wcm.io/conga/</u>
- First published in 2015
- Regular releases
- Maintained by pro!vision







# **General Concepts**

Terminology and concepts





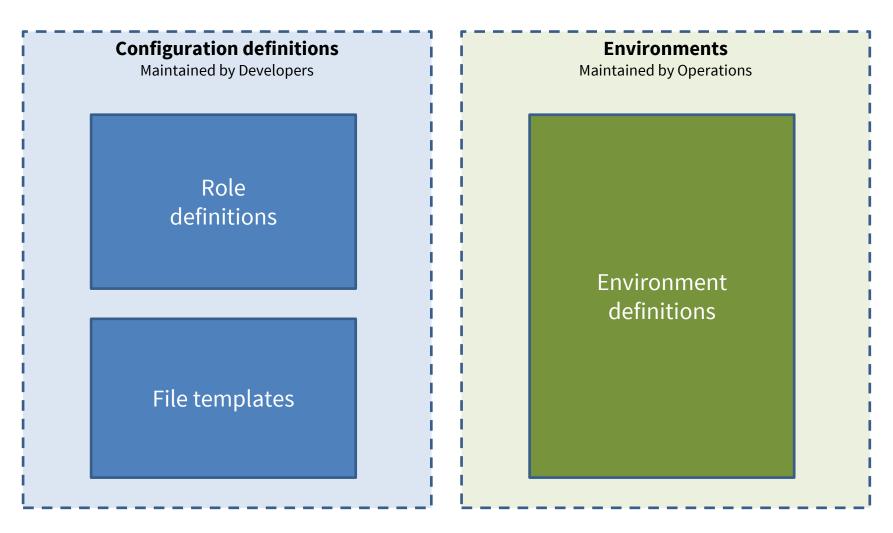
## Built for DevOps

- CONGA separates the templates for the generated files from the actual configuration values needed for each environment
- For each target environment only a "high-level" parameter file needs to be maintained
- CONGA generates the complete configuration from them
- Ideal for integrated DevOps teams, but it also provides a good level of separation of concerns if Dev and Op-Teams are separated organizationally





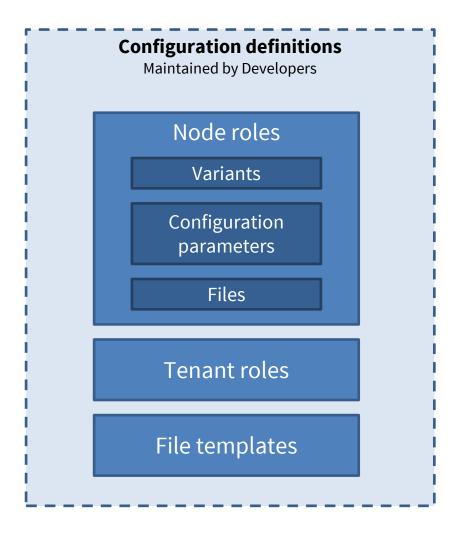
## Configuration meta model

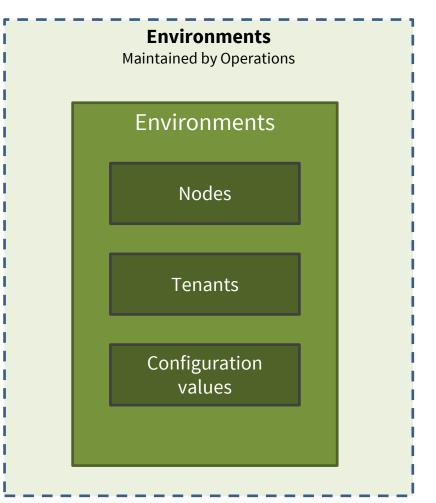






## Configuration definition model

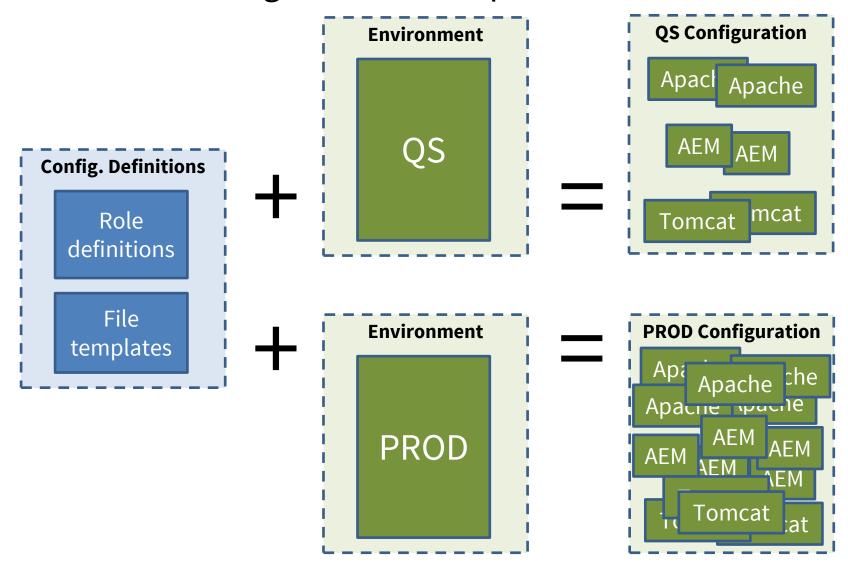








## Generated configuration example



#### **Environments**

- **Environment**: Environment for a specific project or group of projects with a selection of nodes that work together, e.g. "QS", "Prelive", "Prod" etc.
- **Node**: A system to deploy to, e.g. a physical machine, virtual machine, Docker container or any other deployment target.
  - For each node multiple roles can be assigned
  - For each role one or multiple variants
- **Tenant**: List of tenants in the environment and their configuration
  - For each tenant multiple tenant roles can be assigned
- **Configuration value**: Configuration value for a configuration parameter in context of environments, nodes, roles and tenants.



## Configuration definitions

- **Node role**: A set of functionality/application part that can be deployed to a node/machine, e.g. "AEM CMS", "AEM Dispatcher", "Tomcat Service Layer"
  - Variant: Variants of a role with same deployment artifacts but different configuration; e.g. "Author", "Publish", "Importer".
  - Configuration parameter: Definition of configuration parameters that can be set for each environment. The configuration parameter values are merged with the file templates when generating the configuration.
  - File: Defines file to be generated for Role/Variant based on a File Template
- **Tenant role**: Allows to define features required for a tenant, e.g. Tenant Website with or without additional applications
- **File template**: Script-based template the contains static configuration parts and placeholders for the configuration parameter values



## Multitenancy

- Often a single infrastructure environment is used to host applications and websites for multiple tenants (e.g. for multiple markets or different brands)
- Most of this multi-tenancy aspects are managed outside the system configuration (e.g. in content hierarchy and content pages, context-aware configuration in repository)
- But in some occasions the system configuration is affected as well, e.g.
  - One vhost file for each tenant's website in the webserver configuration
  - Short URL Mapping in Dispatcher and AEM for each website
- To support this **tenants** may be defined in each environment, and it is possible to override some of the configuration parameters with tenant-specific values
- Using the "Tenant Multiply" plugin it is possible to generate multiple configuration files (one per tenant) based on a single file template.
- Tenants are independent from roles and role variants from the configuration definition. Tenant roles are specific to tenants and allow to express different characteristics of tenants e.g. with or without a specific feature-set.





### File headers

- CONGA automatically adds a file header to each file/artifact it generates to notice that it is automatically generated.
- Additionally the header contains information which environment, role, variant and versions were used to generate this file.
- CONGA detects the file format automatically and applies the appropriate comment syntax.

#### Example:





# How to run CONGA

**CONGA** tooling





#### Run CONGA

- You have two alternatives to run CONGA
  - Via Maven (recommended)
  - Directly from the command line (via CLI)
- When executing via Maven you have more features like
  - Building maven artifacts with CONGA definitions
  - Use Maven versioning for configuration management
  - Use Maven repositories to distribute configuration definitions

#### Run CONGA via Maven

The CONGA plugin hooks into the Maven lifecycle:

- mvn validate
  - Validate definition files for syntax errors
- mvn generate-resources
  - Generate configurations
- mvn package
  - Package definitions or generated configurations as ZIP file
- mvn install
  - Install definitions or generated configurations in local Maven repository

## Configure CONGA in your pom.xml

Define the CONGA Maven Plugin

- Create a dedicated Maven module for your configuration definitions
  - With <packaging>config-definition</packaging>
  - This module is usually part of your application's Maven POM hierarchy
- And a separate Maven project for your environments
  - With <packaging>config</packaging>
  - This is usually not part of your application

## Maven project folder structure

Folder conventions used by CONGA:

#### **Configuration definitions**

- src/main/roles
  - Role definitions with available configuration parameters
- src/main/templates
  - Handlebars templates for generating files

#### **Environments**

- src/main/environments
  - Environment files with nodes, role references and configuration parameters
- target
  - Configuration is generated to the target folder





## Exercise

#### Execute exercise

#### **PVTRAIN-148-01 See CONGA in action**

- Execute CONGA via Maven
- Have a first look at the role definitions, templates and environments
- Inspect the generated configuration





# YAML syntax

Short introduction of YAML syntax

## About YAML syntax

- CONGA uses YAML 1.1 syntax for role and environment definition metadata.
- Here is a good introduction of YAML syntax basics: <a href="http://docs.ansible.com/ansible/YAMLSyntax.html">http://docs.ansible.com/ansible/YAMLSyntax.html</a>
- Normally you do not need to quote strings, even if they contain special chars like spaces.
  - If you want to quote them, use single quotes ' for a 1:1 representation of the string, or double quotes " if you want to interpret control chars like \n.
- Never use tabs in YAML files.
  - Configure your text editor to always insert spaces instead of tabs (not only for YAML files)
  - Use default tab width of 2 characters





# **CONGA Environments**

Configure nodes, tenants and parameters



#### **CONGA Environment**

A CONGA environment consists of

- List of nodes (target machines)
- **List of roles** for each node (= what is installed on each node)
- Role-specific global configuration (optional)
- Global configuration (optional)
- Tenant definitions (optional)

An environment is described using a YAML file.

#### Full documentation in JavaDocs:

http://devops.wcm.io/conga/generator/apidocs/io/wcm/devops/conga/model/environment/Environment.html





### **Define nodes**

- Defines two nodes with one role each without further configuration
- Node name is either a symbolic name, or a real host name
- Role and variant names are defined in the configuration definition

```
# Defines an environment
nodes:

# Example node with 1 role
- node: services-2
  roles:
  - role: tomcat-services
    variants:
    - services

# Example node with 1 role
- node: webserver
  roles:
  - role: webserver
```

Generate configuration for role **tomcat-services**But only files assigned to variant **services** 



### **Define nodes**

• Defines one nodes with two roles and config parameters

```
# Example node with 2 roles
- node: services-1
  # Config for all roles in this node
  config:
    jvm.heapspace.max: 2048m
    topologyConnectorPath: /specialConnector
  roles:
  - role: tomcat-services
    # Variants allow to pick a specific sub-configuration of a role
   variants:
    - importer
    # Config only for this role
    config:
      topologyConnectors:
      # Merge with list defined already for this parameter
      merge
      - http://host3${topologyConnectorPath}
  - role: tomcat-backendconnector
```





## Global configuration

Configuration parameters can be defined globally for all nodes and roles

```
# Global configuration
config:
    # It is possible to use a shortcut definition for nested maps.
    # jvm.heapspace.max: 4096m
    # is equivalent to
    # jvm:
    # heapspace:
    # max: 4096m
    jvm.heapspace.max: 4096m
    # Configuration entries can be used as variables for other entries topologyConnectorPath: /connector topologyConnectors:
    - http://host1${topologyConnectorPath}
    - http://host2${topologyConnectorPath}
```



## Role-specific global configuration

Configuration parameters can be defined globally for roles (on any node)

```
# Role-specific global configuration
roleConfig:
- role: role1
  config:
    var1: v1
```



### **Tenant definitions**

- You can specify a list of tenants used for the configuration generation
- Example: One vhost file for each tenant in the httpd configuration

```
tenants:
# Tenant with two tenant roles (can be used for filtering file multiply)
- tenant: tenant1
  roles:
  - website
  - application
  config:
    domain: mysite.de
   website.hostname: www.${domain}
 Tenant with one tenant role
- tenant: tenant2
  roles:
  - website
  config:
    domain: mysite.fr
   website.hostname: www.${domain}
```





## Flexible config map definition

- For nested maps a short notation is supported by using a "." notation.
- Both examples express the same configuration





### Variable references

Reference config parameter values with this "variable" syntax:

```
${myvariable}
${mygroup.myvariable}
```

Resolving a variable fails when it is not set – unless you specify a default value:

```
${myvariable:defaultValue}
${myvariable:defaultListItem1,item2,item3}
```

You can also reference values from external sources (provided via plugins), e.g. from Java System Parameters:

```
${system::my.system.parameter}
${system::my.system.parameter:defaultValue}
```

## Configuration parameter inheritance

- Configuration parameter maps are inherited to "deeper levels" within the YAML structure, and the maps are merged on each level.
- The configuration parameters on the "deeper levels" overwrite the parameters from the higher level inheritance order:
  - 1. Global configuration parameters from role definition
  - 2. Configuration from role variant definition
    - If multiple variants are assigned to a node/role their configs are merged, first variants have higher precedence
  - 3. Global configuration from environment
  - 4. Node configuration from environment
  - 5. Global role configuration from environment
  - 6. Role configuration from node
  - 7. Variant configuration from node
  - 8. Configuration from multiply plugins, e.g. the tenant-specific configuration
- Special support for list parameters: If you insert the keyword <u>\_merge\_</u> as list item on either of the list values, they are merged and the special keyword entry is removed.





## Default context properties

• A set of default context properties are defined automatically by CONGA and merged with the parameter maps. Examples:

Property	Description
version	Environment version
nodeRole	Current node role name
nodeRoleVariant	Current node role variant name (only set if the role has exactly one variant)
nodeRoleVariants	List of current node role variant names
environment	Environment name
node	Current node name
tenant	Current tenant name. This is only set if the tenant multiple plugin is used.

 The full list can be found at <u>http://devops.wcm.io/conga/yaml-definitions.html</u>





## Exercise

#### Execute exercise

#### **PVTRAIN-148-02 Configure CONGA environments**

- Create a new environment
- Define multiple nodes
- Change configuration parameters





## **CONGA Roles**

Define roles and templates

#### **CONGA Role**

A CONGA role definition consists of

- List of variants supported by the role (optional)
- Directory where the template files are stored
- List of files to be generated
- Definition of configuration parameters with default values

A role is described using a YAML file.

#### Full documentation in JavaDocs:

http://devops.wcm.io/conga/generator/apidocs/io/wcm/devops/conga/model/role/Role.html



## Define variants and template root path

- A role can define variants that are supported
- Switching between different variants in the environment may
  - activate/deactivate individual files the role
  - or affect conditions in the templates that generate the files
- The template path is always relative to the src/main/templates folder

```
# Variants supported by this role
variants:
- variant: services
- variant: importer

# Relative path to lookup the template files
templateDir: tomcat
Define variants
supported by this role
```



## Configuration parameters with default values

- Defines all configuration parameters (with default values) used by the role
- This acts also as "parameter documentation" for users of the role
  - Optional parameters should be documented as well (commented out)

```
# Defines configuration parameters and default values
config:
  tomcat:
    path: /path/to/tomcat
                                       "Flexible config map definition" rules and
  jvm:
    path: /path/to/java
                                       support for variable placeholders apply here
    heapspace:
                                       as well
      min: 512m
      max: 2048m
    permgenspace:
      max: 256m
  topologyConnectors:
    - http://localhost:8080/libs/sling/topology/connector
  # Optional - enable debug mode
  #debug: true
```



## File generation

- Mandatory parameters for each generated file:
  - file: Destination file name
  - dir: Relative path for destination directory
  - template: Handlebar template name
- Optional parameters:
  - variants: Generate the file only for a given list of role variants
  - charset: Define file encoding (default: UTF-8)
  - condition: Condition whether the file should be generated
    - The condition is a single variable placeholder
    - The condition is true if the resulting string of the variable is not empty and does not match "false".
  - lineEndings: Define line endings unix (default), windows or macos

## Plugins for file generation

- Optionally you can control which plugins should be applied:
  - validators: Validates the syntax of the generated file.
    - If not set, a plugin that accepts the file extension is chosen automatically.
  - validatorOptions: Options for the validator plugins
  - postProcessors: Post-process files (e.g. transform in different format)
  - postProcessorOptions: Options for post processor plugins
  - fileHeader: Adds a file header to the generated file
    - If not set, a plugin that accepts the file extension is chosen automatically.
  - escapingStrategy: Rules for escaping the inserted values
    - If not set, a plugin that accepts the file extension is chosen automatically.
  - multiply: Generate multiple files instead of one single file
  - multiplyOptions: Options for multiply plugins



## Generate single file

Generating single files

```
# Define a single file to be generated for all role variants
- file: seteny.sh
  dir: bin
  template: setenv.sh.hbs
  # Default charset is UTF-8 unless specified otherwise
  charset: ISO-8859-1
# Define a single file to be generated for role variant 'services'
- file: ROOT xml
 variants:
  - services
  dir: conf/Catalina/localhost
  template: ROOT.xml.hbs
  # Allows to define special validators.
  # If missing the best-match validator is picked automatically.
 validators:
  - xm1
```

#### Generate file for selected variants

 Files can be generated depending on variants given for a node/role combination in the environment definition

To generate a file when **any** of the given variants is defined (OR):

```
- file: file1.xml
variants:
- variant1
- variant2
template: file1.xml.hbs
```

To generate a file when **all** of the given variants is defined (AND):

```
- file: file2.xml
variants:
- variant1*
- variant2*
template: file2.xml.hbs
File is generated only when both
"variant1" and "variant2" are given
```



## Generate multiple files

- Generate multiple files with the sample template
- E.g. one file for each tenant (different multiply plugins may exist)

```
# Define a file to be generated per tenant
- file: "${tenant}_vhost.conf"
    dir: vhosts
    template: tenant_vhost.conf.hbs
    # Multiply file for each tenant that has the given roles
    multiply: tenant
    multiplyOptions:
        roles:
        - website
```





## Download/Copy files

- As an alternative to generating the files it is possible to download and copy files into the target directory.
- They are not generated via handlebars, but may be post-processed as well.

```
# Copy file from classpath
- file: mysample.txt
  dir: download
  url: classpath:/sample.txt
  modelOptions:
      customOption1: value1
      customOption2: 123

# Download file from maven repository, use artifact filename.
# Derive version from maven project.
- url: mvn:x.y.myapp/x.y.myapp.complete-package//zip
  dir: packages
```

### Sources for download/copy files

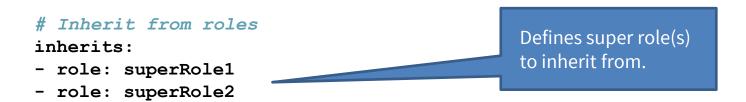
- The following URL prefixes are supported out of the box:
  - file: Absolute filesystem path
  - classpath: Classpath resource reference
  - http://orhttps://-External URL
  - mvn: Maven Artifact coordinates
    - only supported when CONGA runs inside Maven)
    - Maven Coordinates Syntax 1 (Maven-style): groupId:artifactId[:packaging][:classifier]:version
    - Maven Coordinates Syntax 2 (SlingStart-style):
       groupId/artifactId/version[/type][/classifier]
    - classifier and type are optional.
    - If the version is empty in the role file it is resolved from the Maven project.
- If no prefix is specified the URL is interpreted as relative path in the local filesystem.





#### Role Inheritance

- A role can inherit from one or multiple other roles
  - The current role inherits all configuration and files from the super role(s).
  - Configuration maps are merged, the config of the current role has higher precedence.
  - If the super role defines variants, the current has to define the same variants as well.
  - Files in the current role with the same target file name as a file in a super role have higher precedence than the files from the super role.







## Handlebars quickstart

Template language for CONGA





# handlebars



Handlebars provides the power necessary to let you build **semantic templates** effectively with no frustration.

Handlebars is largely compatible with Mustache templates. In most cases it is possible to swap out Mustache with Handlebars and continue using your current templates.

Handlebars templates look like regular HTML, with embedded handlebars expressions.

```
<div class="entry">
  <h1>{{title}}</h1>
  <div class="body">
    {{body}}
  </div>
</div>
```

A handlebars expression is a [{{ |, some contents, followed by a |}}]

http://handlebarsjs.com/

http://jknack.github.io/handlebars.java/





#### About handlebars

- CONGA uses **handlebars** (Java) as template engine for file generation
- All handlebar language features can be used
- CONGA adds some additional expressions
- You can add your own expressions as well (via CONGA plugins)



#### Handlebars basics: Variable references

To insert a variable from configuration parameter maps with escaping (escaping strategy depending on file type):

```
{{group1.param1}}
```

To insert a variable without escaping (you have to take care of generating a valid file yourself):

```
{{group1.param1}}}
```

#### Handlebars basics: Conditions

To conditionally generate a block: {{#if group1.flag1}} condition met block... {{/if}} Optionally you can define an else block: {{#if group1.flag1}} condition met block... {{else}} condition not met block... {{/if}}

## Handlebars basics: For each loop

```
To loop about a list of values:
{{#each group1.list}}
  {{this.param1}}
{ { /each } }
If you want to add a separator between each item but not after the last:
{{#each group1.list}}
  "{{this.param1}}"{{#unless @last}},{{/unless}}
{{/each}}
To insert the list index from the for each loop:
{{#each group1.list}}
  "prop{{@index}}": "{{this.param1}}",
{ { /each } }
```

## Handlebars basics: Whitespace handling

You can control whitespace handling around handlebar expressions by inserting ~ at the beginning or end of the handlebars expression. On the side of this expression all whitespaces are removed up to the next handlebars expression or non-white space content.

Example: Remove all whitespaces inside the expression:

```
{{#if group1.flag1 ~}}
  conditional block...
{{~/if}}
```

Example: Remove all whitespaces around the expression:

```
{{~#if group1.flag1}}
  conditional block...
{{/if ~}}
```

#### Handlebars basics: Partials and blocks

If you want to modularize your templates and reused a shared set of content or expressions in multiple templates you can use partials and blocks.

Example of a file with shared content/expressions using blocks:

```
{{#block "serverName"}}
ServerName {{group1.serverName}}
{{/block}}

{{#block "documentRoot"}}
DocumentRoot "{{group1.rootPath}}"
{{/block}}
```



#### Handlebars basics: Partials and blocks

You can include this file in another and overwrite parts from the shared file by overwriting single blocks with a partial:

```
... main template start
{{#partial "serverName"}}
 ServerName {{group1.otherServerName}}
 ServerAlias {{group1.aliasName}}
{{/partial}}
{{> role1/mypartialtemplate.conf.hbs}}
... main template end
```





#### Handlebars basics: Comments

To include a comment that is stripped from the generated file:

```
{{!-- my comment --}}
```



## CONGA-specific handlebar expressions:

- regexQuote To insert a variable expression and applying regex quoting
- **join** To join a list of values with a separator character
- ifEquals Conditional if statement with separate argument
- **defaultIfEmpty** Inserts default value if expression not set
- eachIf Conditional for each loop
- eachIfEquals Conditional for each loop with separate argument
- **contains** Checks for presence of a given value in a list
- ensureProperties Ensure that mandatory properties are set

The CONGA-specific expressions are documented here: <a href="http://devops.wcm.io/conga/handlebars-quickstart.html">http://devops.wcm.io/conga/handlebars-quickstart.html</a>

### Mandatory properties

Your role may require mandatory properties that the user has to specify in the environment, otherwise the configuration build should fail.

In CONGA, this is controlled by using the **ensureProperties** expression the templates.

#### Example:

```
{ {ensureProperties
    "httpd.serverNameSsl"
    "httpd.ssl.certificateKeyFile"
~} }
Build fails if any of these properties are not set.
```

The expression can also be used in conditional blocks – making properties mandatory only when a certain condition is met.





## **CONGA Extensibility model**

Plugin Architecture





## CONGA Extensibility model

- The CONGA architecture is very modular
- Most functionality provided by CONGA itself is implemented by plugins shipped with CONGA
- More functionality is provided by Plugins e.g. for Sling and AEM
- You can easily write your own CONGA plugins to add support for new file formats or other special features

## Conga SPI

CONGA allows to provider custom plugins that are applied on generated files:

- File Header Plugin: Adds a file header to each generated file. \*)
- Validator Plugin: Validate file syntax after generation. \*)
- Handlebars Escaping Strategy Plugin: How to escape special characters in the generated file. \*)
- **Post Processor Plugin**: Plugin that operates on a generated file, e.g. to convert it to a binary file.

<sup>\*)</sup> These plugins detect files with certain extensions, and are executed automatically on them.



## Conga SPI

#### Other plugins:

- Multiply Plugin: Generate multiple files with a single template.
- Value Provider Plugin: Allows to provide values form external sources, which can be referenced like variables.
- Node Model Export Plugin: Export "model data" for IT automation tools.
- URL File Plugin: Define new sources to download/copy files from.
- Handlebars Helper Plugin: Define your own handlebar expressions.

#### For a list of all built-in plugins see:

http://devops.wcm.io/conga/extensibility.html
http://devops.wcm.io/conga/plugins/sling/extensions.html
http://devops.wcm.io/conga/plugins/aem/extensions.html





## **Advanced Maven Topics**

Use CONGA and Maven effectively



## Configure the CONGA Maven plugin

#### You can configure:

- the paths to look up roles, templates and environments
- whether to generate configuration for all or only for a single environment
- whether to create a single ZIP file for all environments, or one for each
- whether to export model data (model.yaml) per node or not

Full documentation of the CONGA Maven plugin:

http://devops.wcm.io/conga/tooling/conga-maven-plugin/plugin-info.html



## Combine multiple configuration definitions

- You are not limited to use only one single artifact which contains the CONGA configuration definitions (roles, templates)
- You can reference multiple of them in your environment POM and use and mix the roles as required
  - You will see examples of this in the next training "PVTRAIN-146 AEM Configuration with CONGA"
- You can also overlay templates files from referenced artifacts with modified versions from your own
  - In this case the dependency order in the Maven projects controls which file is loaded from the classpath if multiple exists with the same name
  - You should only overlay files this way if the file from the original role is designed for this, e.g. by using Handlebars partials and blocks

## Deploy CONGA Maven artifacts

- Usually only the CONGA configuration definition artifacts are deployed to a central maven repository.
- The environments are kept in a source code management repository as well, but neither the environment definitions nor the generated configuration should be uploaded to a maven repository because they may contain sensitive data (e.g. passwords).
- The configuration definition is released and versioned together with the application. Thus it is possible to rollback to a previous version of the application together with the matching configuration definition, but still using the latest environment parameter values.
- The version of application (and configuration definition) that should be deployed is configured in the POM of the environment definition.





#### Exercise

#### Execute exercise

#### **PVTRAIN-148-03 Define CONGA Roles and Templates**

- Update roles and introduce variants
- Change templates
- Create new parameters
- Define tenants