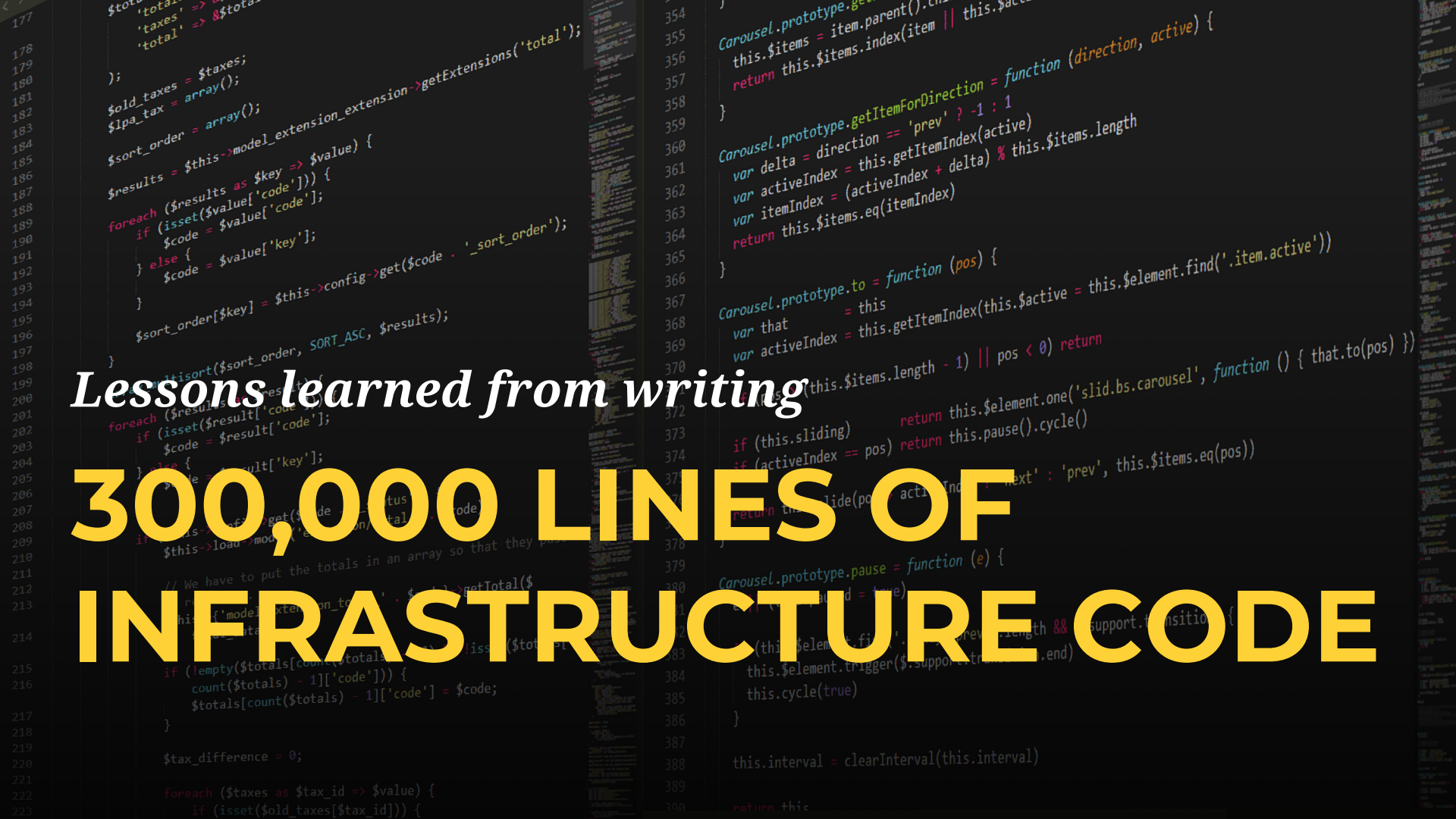

Lessons learned from writing
300,000 LINES OF INFRASTRUCTURE CODE

It’s time for a confession:

DevOps is still in the stone ages


We are trying to build this...

Using this.

If you just read the headlines, it all *sounds* so cutting edge...

Kubernetes, Docker, serverless, microservices, infrastructure as code, distributed tracing, big data systems, data warehouses, data lakes, chaos engineering, zero-trust architecture, streaming architecture, immutable infrastructure, service discovery, service meshes, NoSQL, NewSQL, ChatOps, HugOps, NoOps, DevSecOpsLeanSREAgileWTFBBQ, ...

But to me, it doesn't *feel* cutting edge. It feels more like...

#thisisdevops

#thisisdevops

#thisisdevops

#thisisdevops

Here’s something we don’t admit often enough:

Building production-grade infrastructure is hard.

And stressful.

And time consuming.

Some rough numbers:

Production-grade infrastructure

Project	Examples	Time estimate
Managed service	ECS, ELB, RDS, ElastiCache	1 – 2 weeks
Distributed system (stateless)	nginx, Node.js app, Rails app	2 – 4 weeks
Distributed system (stateful)	Elasticsearch, Kafka, MongoDB	2 – 4 months
Entire cloud architecture	Apps, DBs, CI/CD, monitoring, etc.	6 – 24 months

Fortunately, it’s getting a little bit better


One trend I love: manage (almost) everything as code

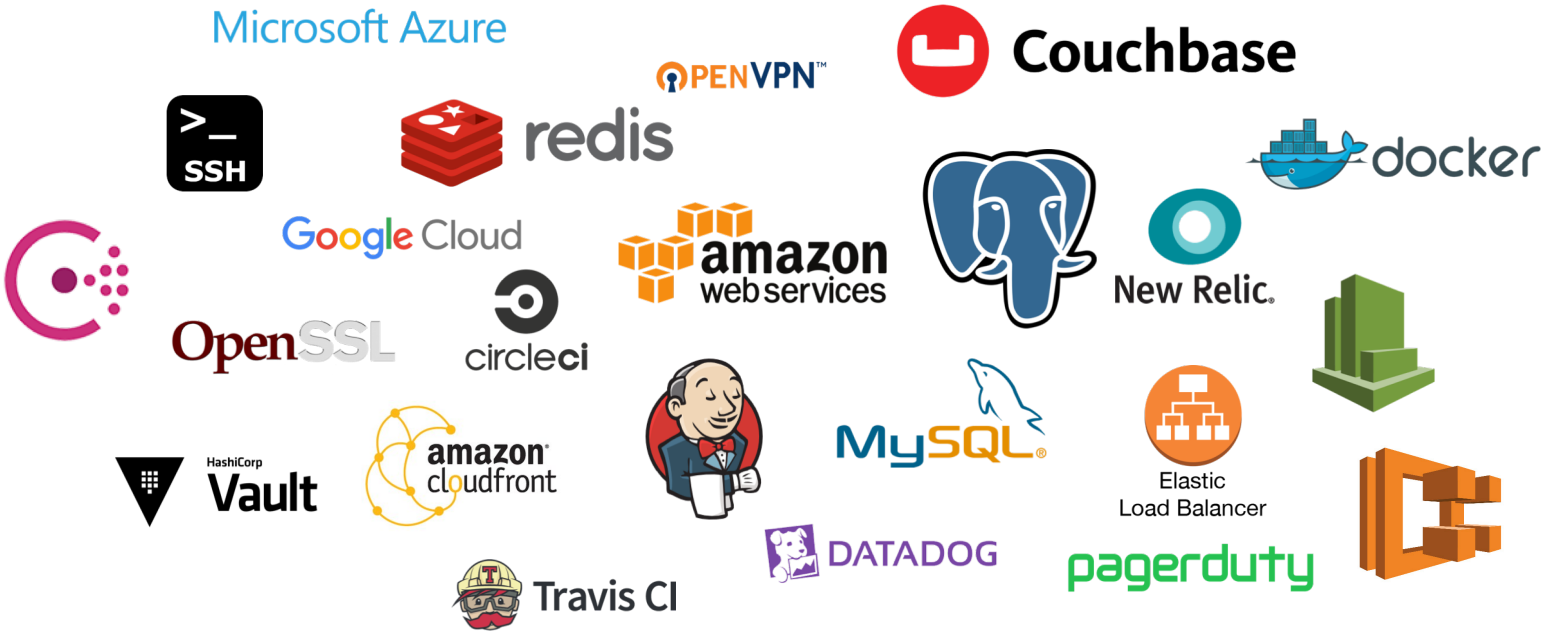
Manual provisioning → Infrastructure as code
Manual server config → Configuration management
Manual app config → Configuration files
Manual builds → Continuous integration
Manual deployment → Continuous delivery
Manual testing → Automated testing
Manual DBA work → Schema migrations
Manual specs → Automated specs (BDD)

The benefits of code:

1. Automation
2. Version control
3. Code review
4. Testing
5. Documentation
6. Reuse

At Gruntwork, we've created a reusable library of infrastructure code

Primarily written in Terraform, Go, Python, and Bash



Off-the-shelf, battle-tested solutions for AWS, Docker, VPCs, VPN, MySQL, Postgres, Couchbase, ElasticSearch, Kafka, ZooKeeper, Monitoring, Alerting, secrets management, CI, CD, DNS, ...

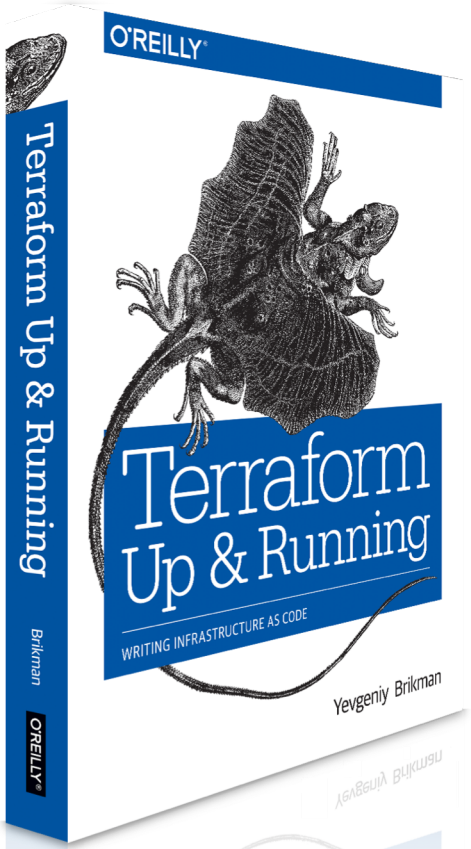
3+ years of development.
300,000+ lines of code.

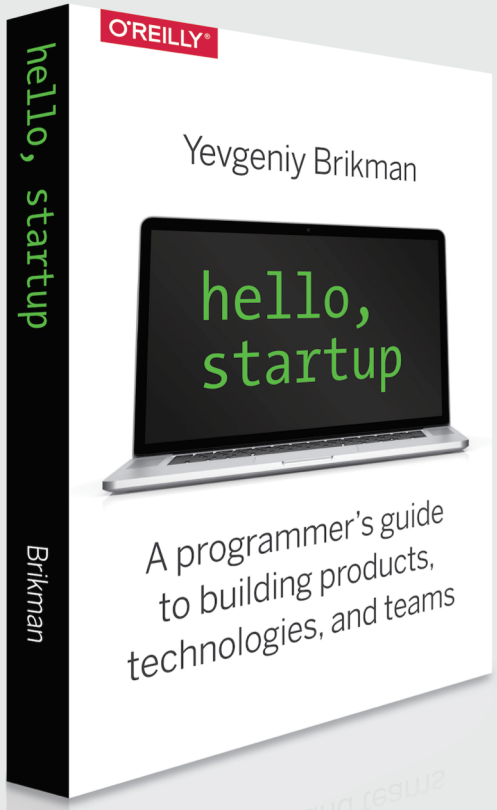
In this talk, I’ll share what we learned along the way!


I’m
Yevgeniy
Brikman
ybrikman.com

gruntwork.io

Co-founder of Gruntwork


O'REILLY
Terraform Up & Running
Brikman
O'REILLY
Terraform
Up & Running
WRITING INFRASTRUCTURE AS CODE
Yevgeniy Brikman


hello, startup
Brikman
O'REILLY
Yevgeniy Brikman
hello,
startup
A programmer's guide
to building products,
technologies, and teams

Author

Outline

1. Checklist
2. Tools
3. Modules
4. Tests
5. Releases

Outline

1. Checklist
2. Tools
3. Modules
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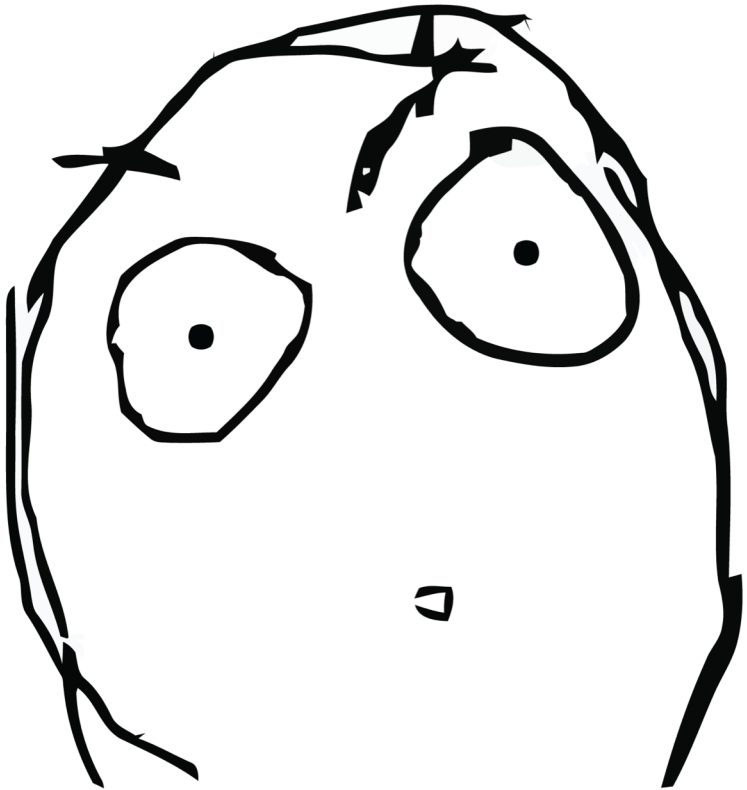
5. Releases

DevOps newbies are always shocked by these numbers:

Production-grade infrastructure

Project	Examples	Time estimate
Managed service	ECS, ELB, RDS, ElastiCache	1 – 2 weeks
Distributed system (stateless)	nginx, Node.js app, Rails app	2 – 4 weeks
Distributed system (stateful)	Elasticsearch, Kafka, MongoDB	2 – 4 months
Entire cloud architecture	Apps, DBs, CI/CD, monitoring, etc.	6 – 24 months

6 – 24 months

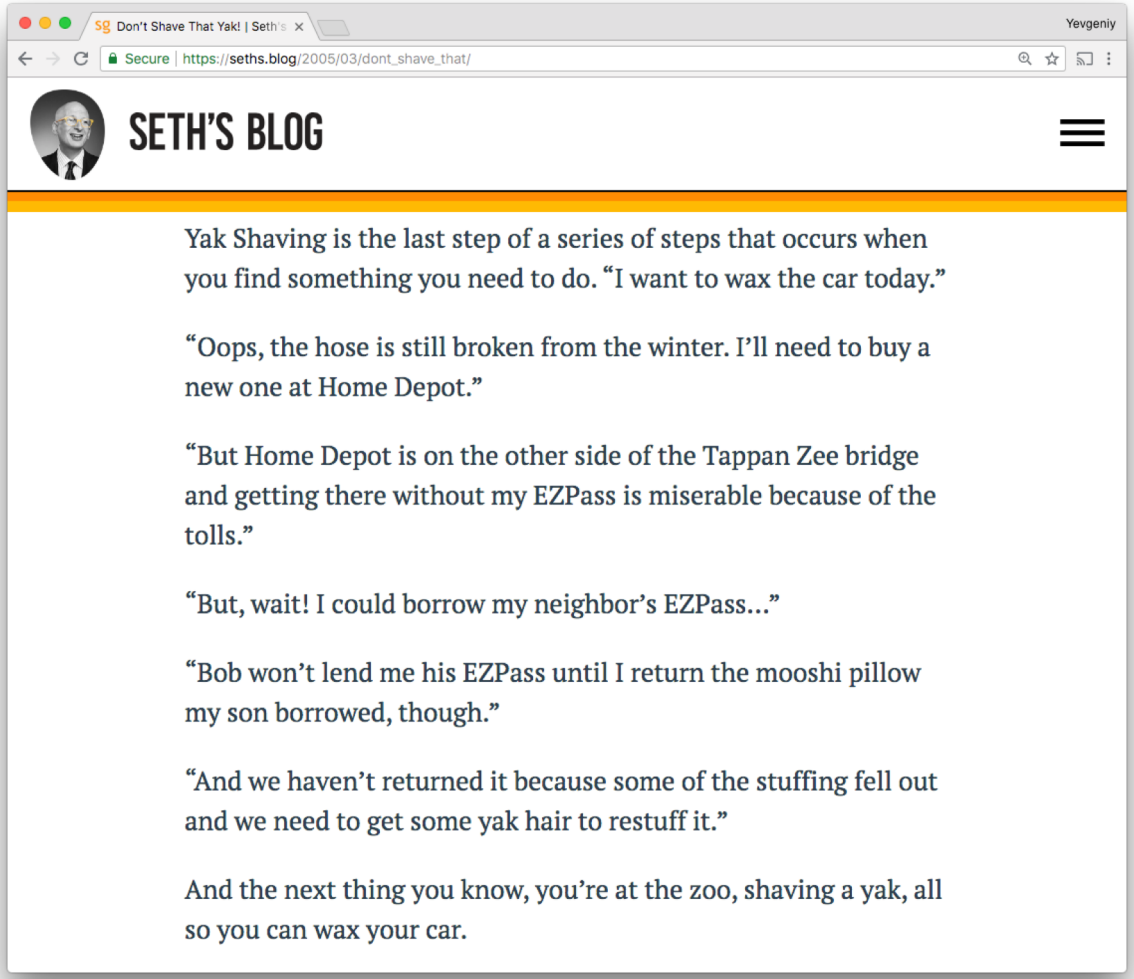


How can it possibly take that long??

Two main reasons:

Reason it takes so long #1: Yak shaving

Yak shaving: a seemingly endless series of small tasks you have to do before you can do what you actually want.



Yak Shaving is the last step of a series of steps that occurs when you find something you need to do. "I want to wax the car today."

"Oops, the hose is still broken from the winter. I'll need to buy a new one at Home Depot."

"But Home Depot is on the other side of the Tappan Zee bridge and getting there without my EZPass is miserable because of the tolls."

"But, wait! I could borrow my neighbor's EZPass..."

"Bob won't lend me his EZPass until I return the mooshi pillow my son borrowed, though."

"And we haven't returned it because some of the stuffing fell out and we need to get some yak hair to restuff it."

And the next thing you know, you're at the zoo, shaving a yak, all so you can wax your car.

Reason it takes so long #2: It’s a long checklist!

Introducing:

The production-grade infrastructure checklist

Production-grade infrastructure checklist, part 1/4

Task	Description	Example tools
Install	Install the software binaries and all dependencies.	Bash, Chef, Ansible, Puppet
Configure	Configure the software at runtime: e.g., configure port settings, file paths, users, leaders, followers, replication, etc.	Bash, Chef, Ansible, Puppet
Provision	Provision the infrastructure: e.g., EC2 Instances, load balancers, network topology, security groups, IAM permissions, etc.	Terraform, CloudFormation
Deploy	Deploy the service on top of the infrastructure. Roll out updates with no downtime: e.g., blue-green, rolling, canary deployments.	Scripts, Orchestration tools (ECS, K8S, Nomad)

Production-grade infrastructure checklist, part 2/4

Task	Description	Example tools
Security	Encryption in transit (TLS) and on disk, authentication, authorization, secrets management, server hardening.	ACM, EBS Volumes, Cognito, Vault, CiS
Monitoring	Availability metrics, business metrics, app metrics, server, metrics, events, observability, tracing, alerting.	CloudWatch, DataDog, New Relic, Honeycomb
Logs	Rotate logs on disk. Aggregate log data to a central location.	CloudWatch Logs, ELK, Sumo Logic, Papertrail
Backup and restore	Make backups of DBs, caches, and other data on a scheduled basis. Replicate to separate region/account.	RDS, ElastiCache, ec2-snapper, Lambda

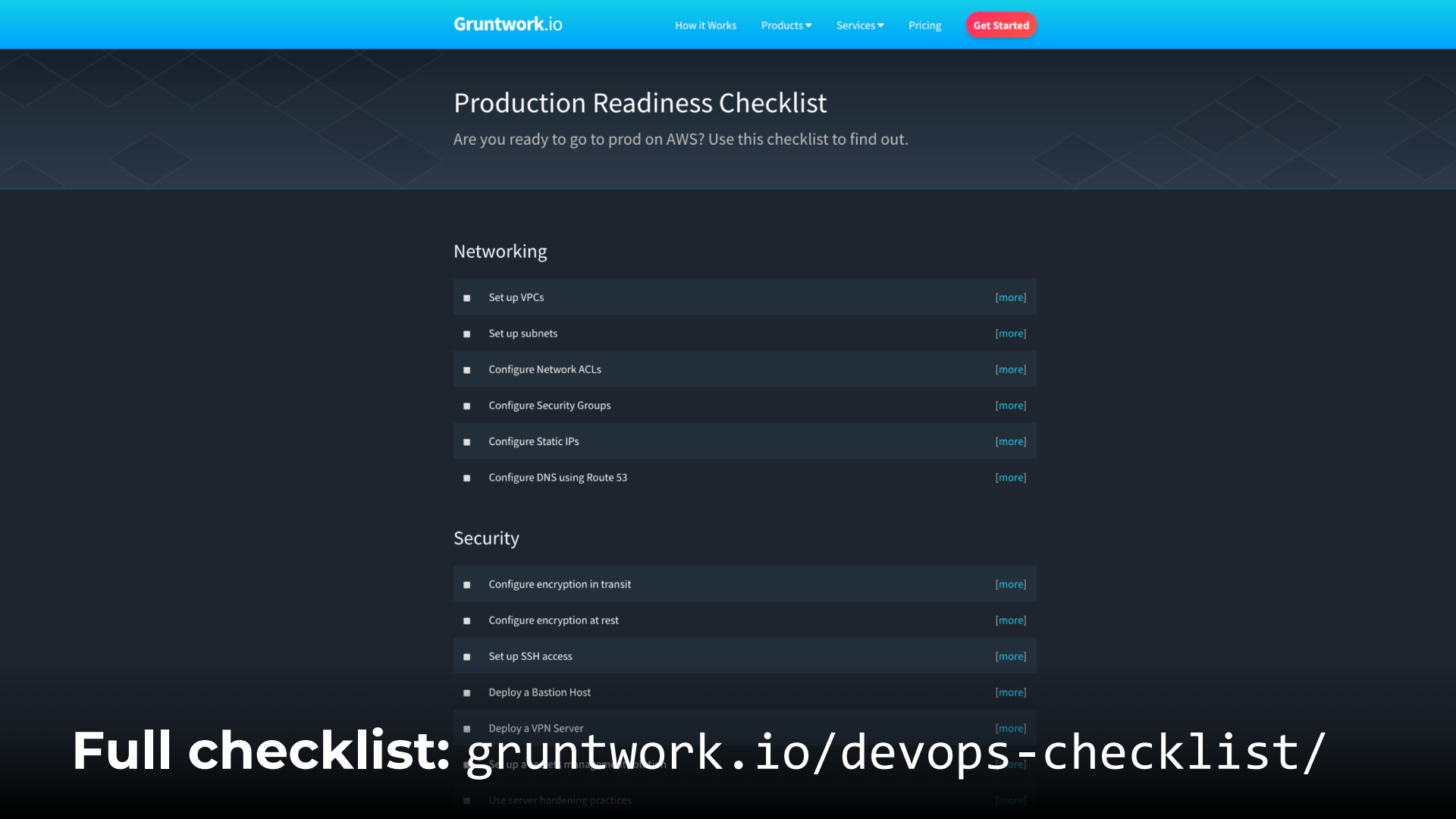
Production-grade infrastructure checklist, part 3/4

Task	Description	Example tools
Networking	VPCs, subnets, static and dynamic IPs, service discovery, service mesh, firewalls, DNS, SSH access, VPN access.	EIPs, ENIs, VPCs, NACLs, SGs, Route 53, OpenVPN
High availability	Withstand outages of individual processes, EC2 Instances, services, Availability Zones, and regions.	Multi AZ, multi-region, replication, ASGs, ELBs
Scalability	Scale up and down in response to load. Scale horizontally (more servers) and/or vertically (bigger servers).	ASGs, replication, sharding, caching, divide and conquer
Performance	Optimize CPU, memory, disk, network, GPU and usage. Query tuning. Benchmarking, load testing, profiling.	Dynatrace, valgrind, VisualVM, ab, Jmeter

Production-grade infrastructure checklist, part 4/4

Task	Description	Example tools
Cost optimization	Pick proper instance types, use spot and reserved instances, use auto scaling, nuke unused resources	ASGs, spot instances, reserved instances
Documentation	Document your code, architecture, and practices. Create playbooks to respond to incidents.	READMEs, wikis, Slack
Tests	Write automated tests for your infrastructure code. Run tests after every commit and nightly.	Terratest

Key takeaway: use a checklist to build production-grade infrastructure.



Full checklist: gruntwork.io/devops-checklist/

Outline

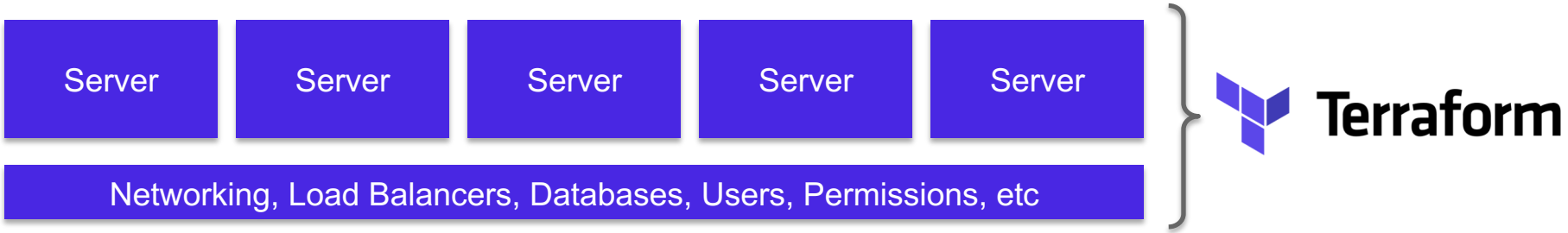
1. Checklist
2. Tools
3. Modules
4. Tests
5. Releases

What tools do you use to implement that checklist?

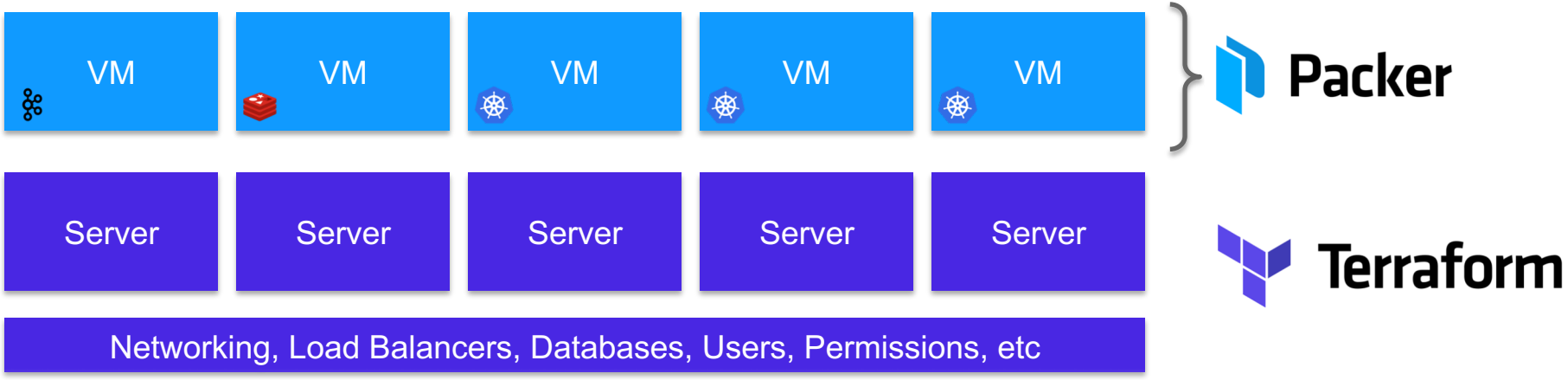
We prefer tools that:

1. Define infrastructure as code
2. Are open source & popular
3. Support multiple providers
4. Support reuse & composition
5. Require no extra infrastructure
6. Support immutable infrastructure

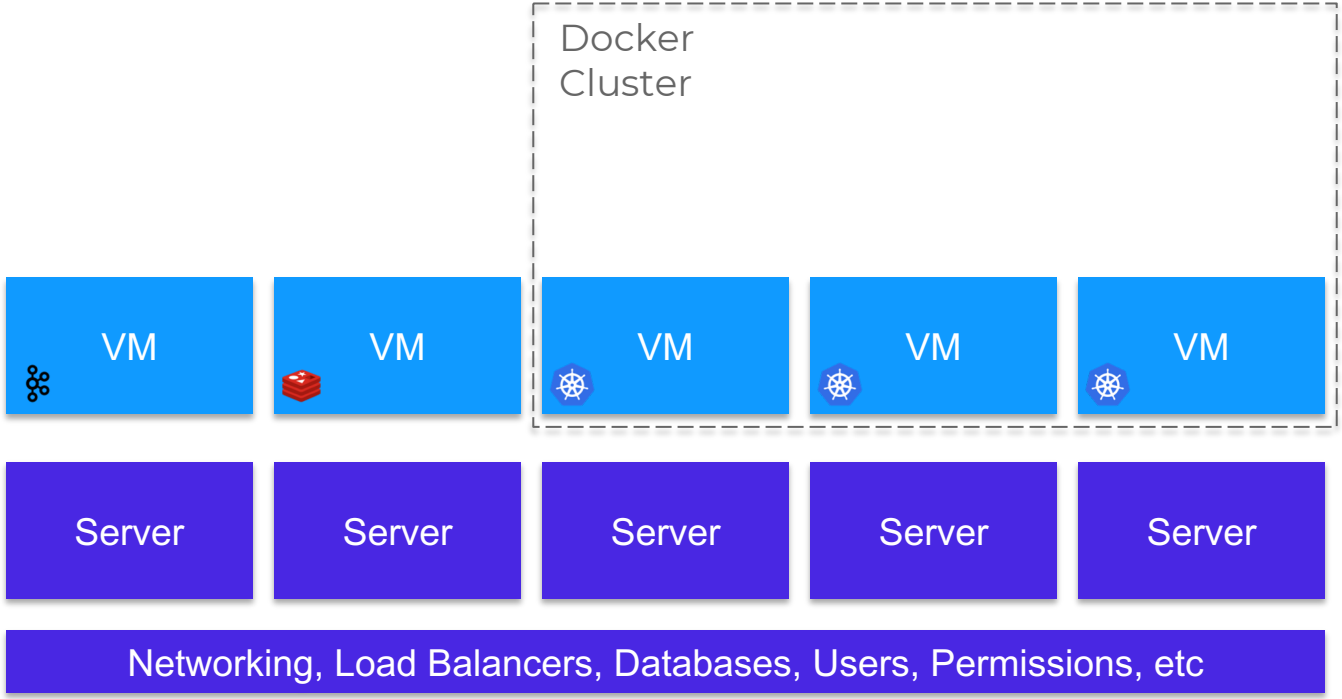
Here’s the toolset we’ve found most effective as of 2019:



1. Deploy all the basic infrastructure using Terraform



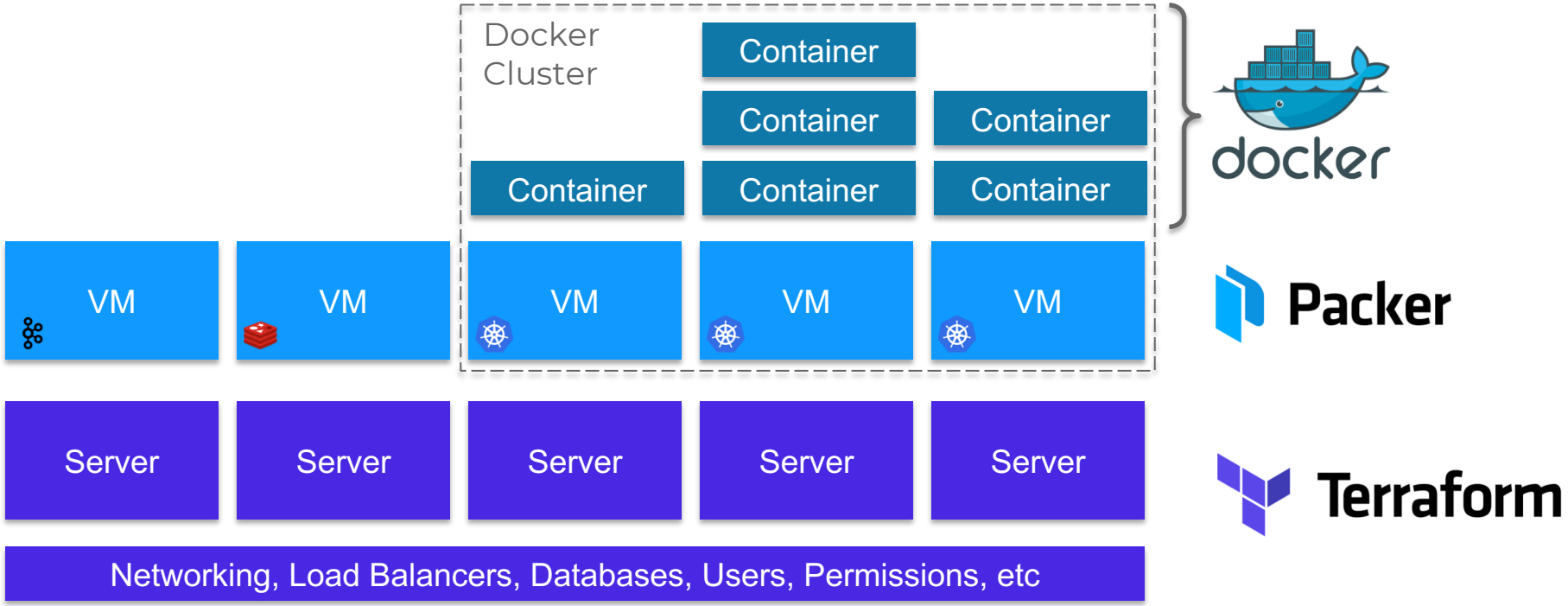
2. Configure the VMs using Packer



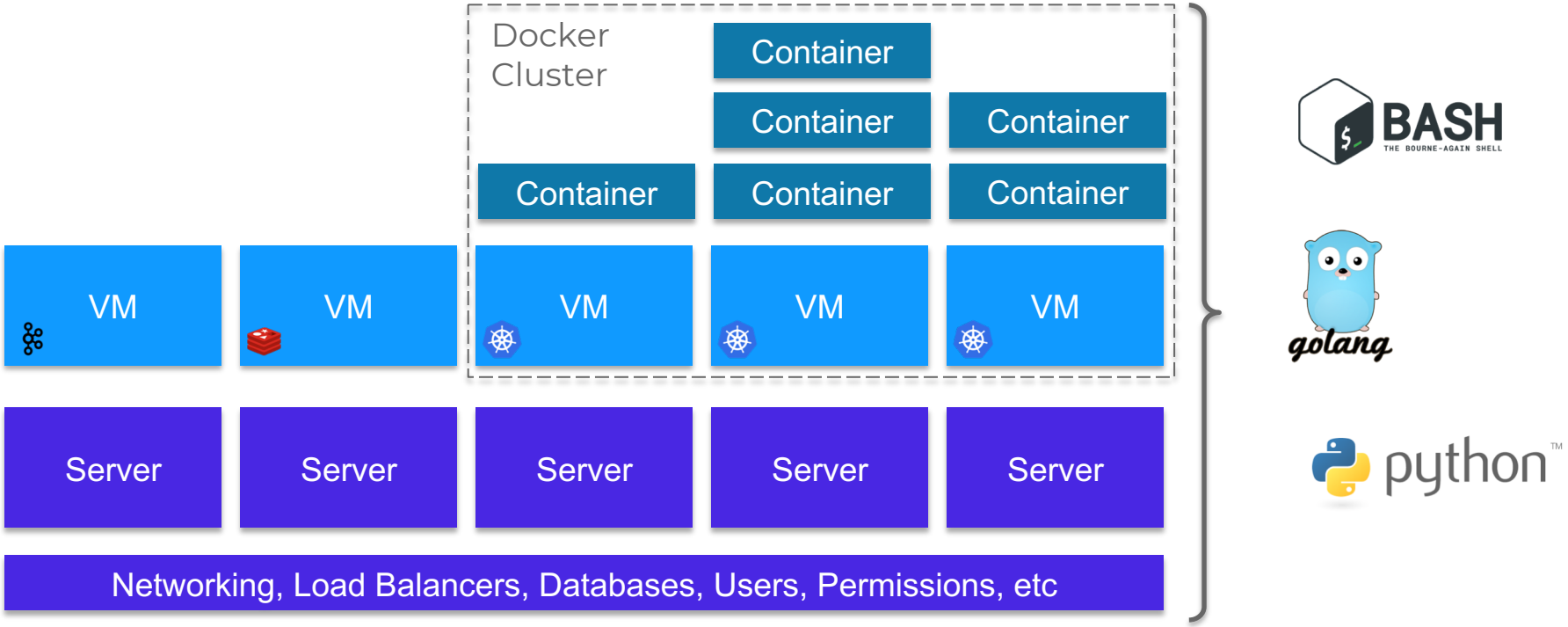
Packer

Terraform

3. Some of the VMs form a cluster (e.g., ECS or Kubernetes cluster)

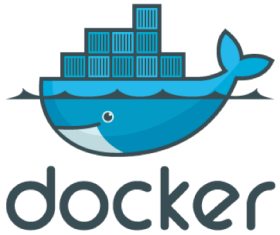


4. We use that Docker cluster to run Docker containers



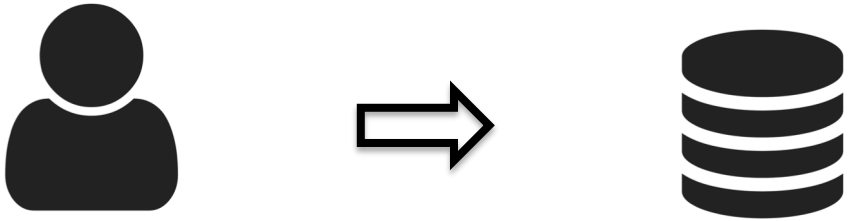
5. Under the hood: Bash, Go, and Python hold everything together

Important note:

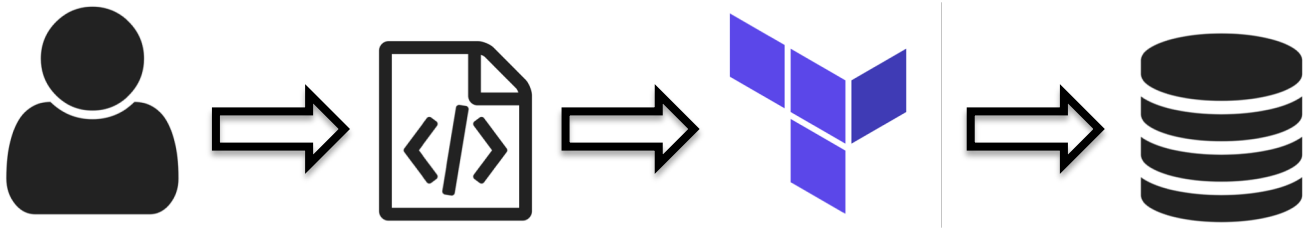


We find these tools useful...

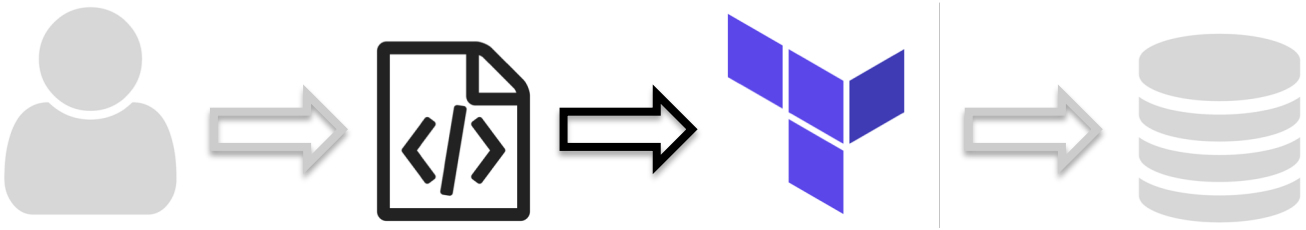
But tools are not enough.
You must change behavior too.



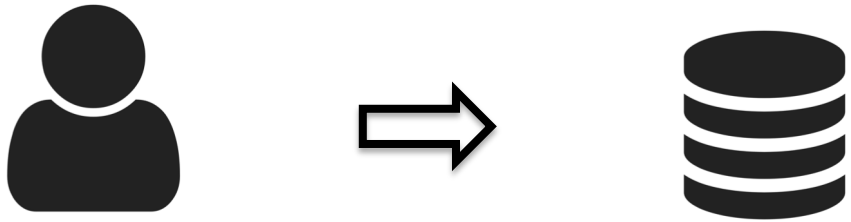
Old way: make changes directly and manually



New way: make changes indirectly and automatically

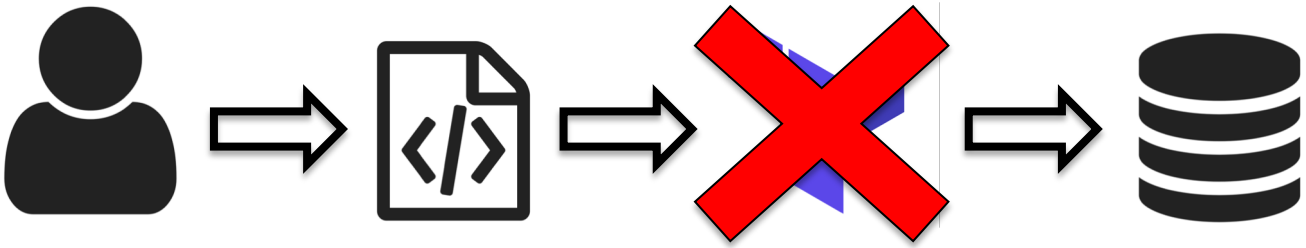


Learning these takes time

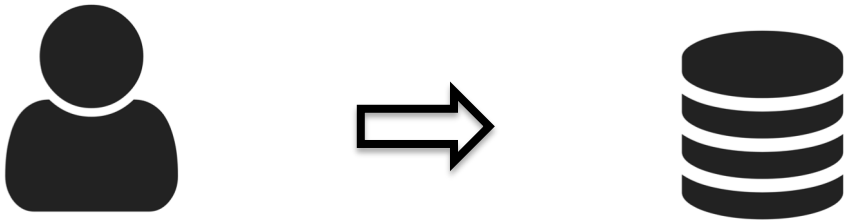


More time than making a change directly...

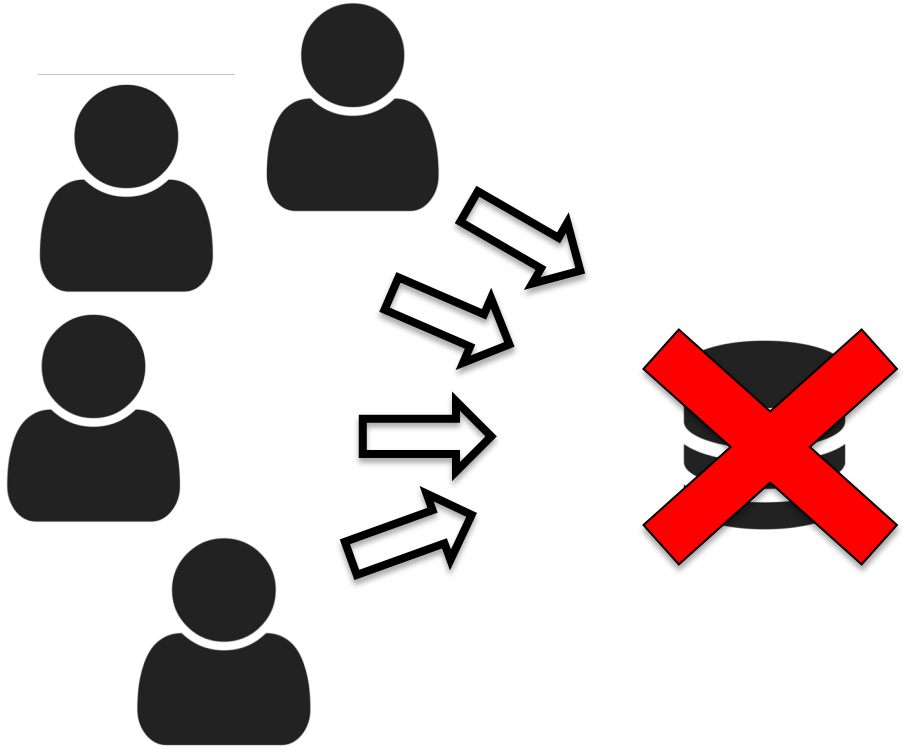
If you make changes manually, the code will not reflect reality.



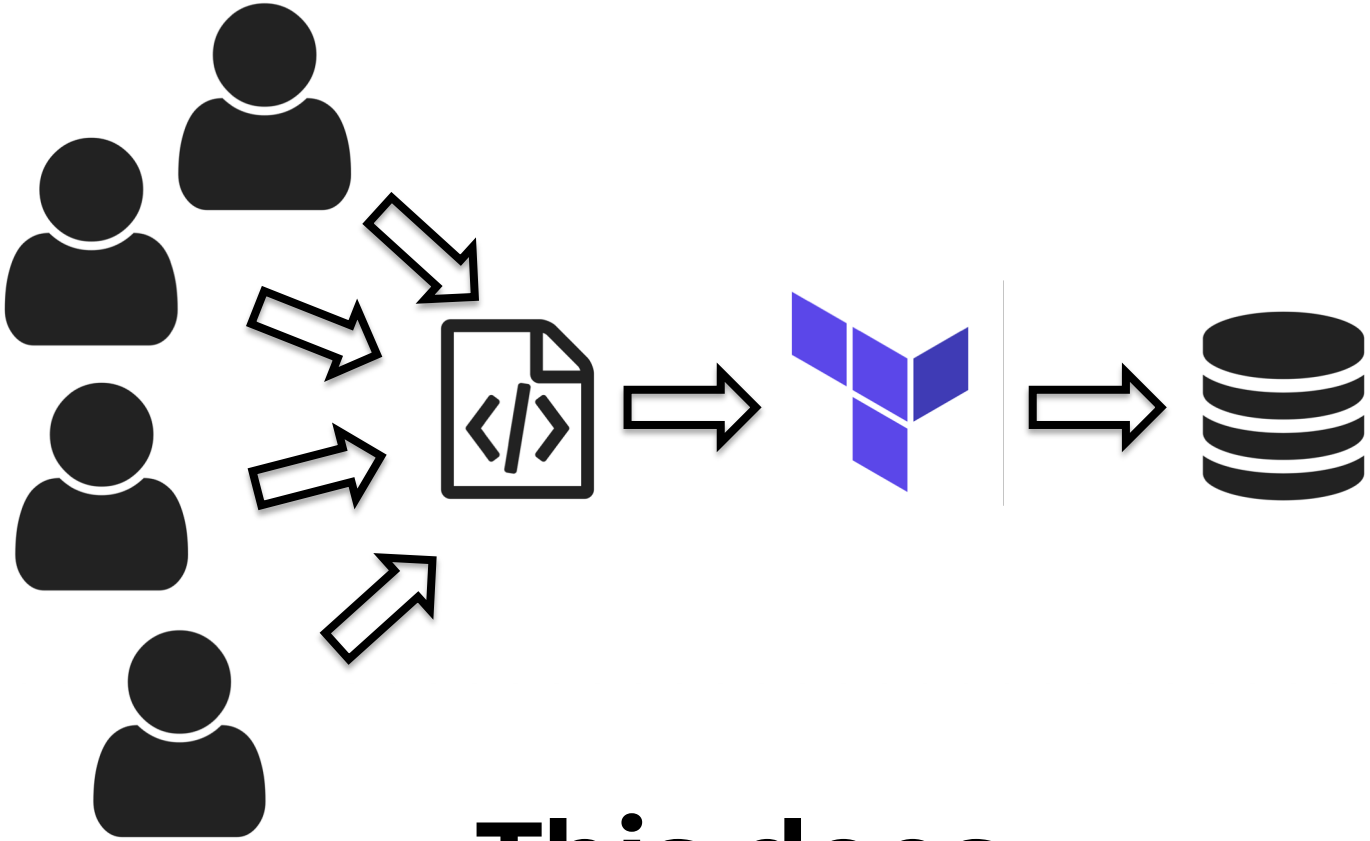
And the next person to try to use it will get errors



So then they'll fall back and make manual changes



But making manual changes does not scale



This does

Key takeaway: tools are not enough. You also need to change behavior.

Outline

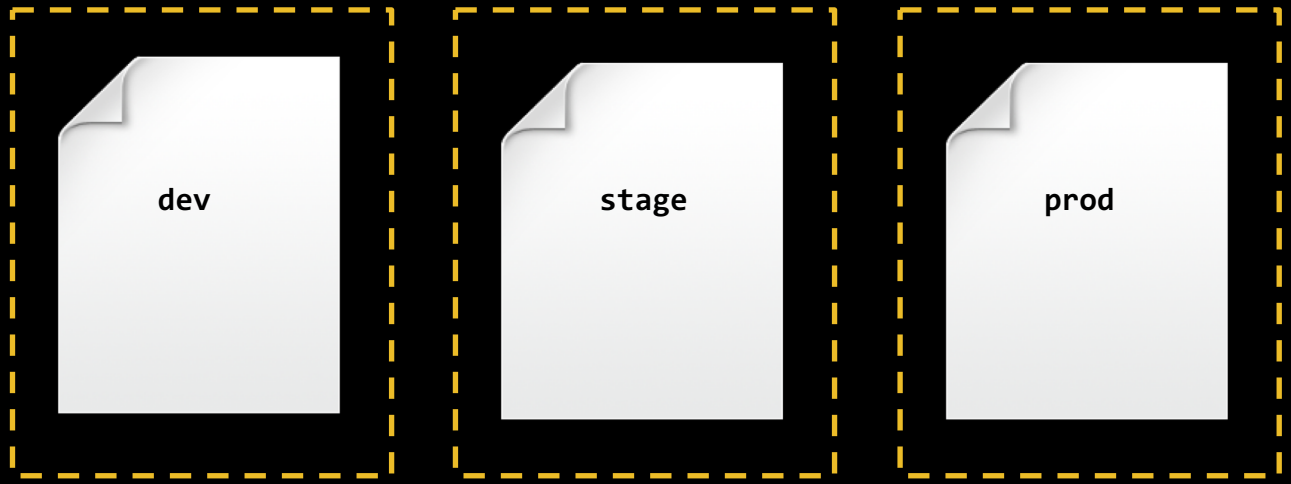
1. [illegible]
2. Tools
3. **Modules**
4. Tests
5. Releases

It’s tempting to define your entire infrastructure in 1 file / folder…

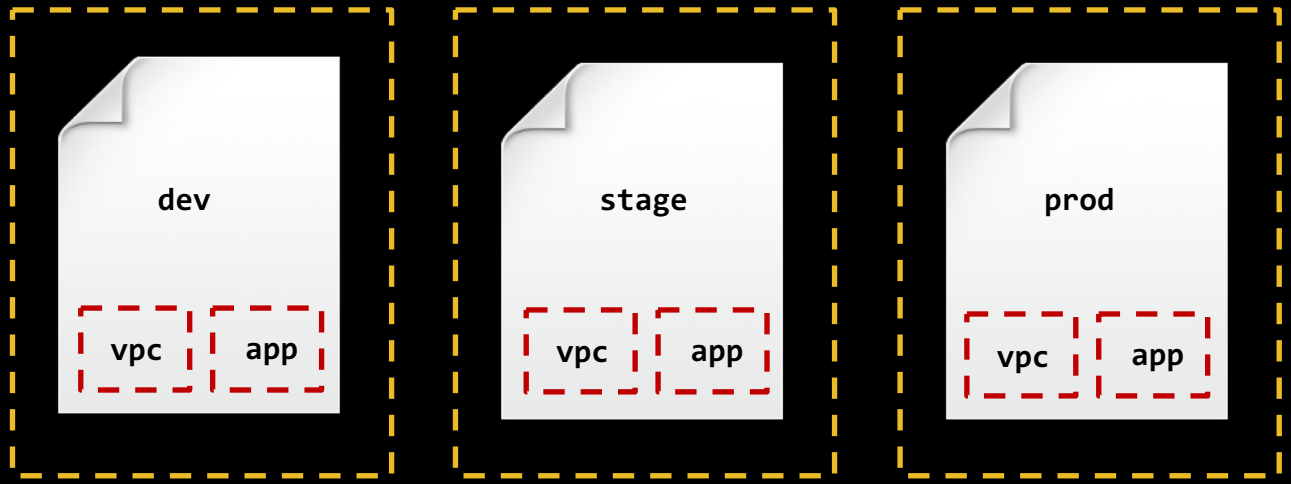
Downsides: runs slower; harder to understand; harder to review (`plan` output unreadable); harder to test; harder to reuse code; need admin permissions; team concurrency limited to 1…

Also, a mistake *anywhere* could break **everything!**

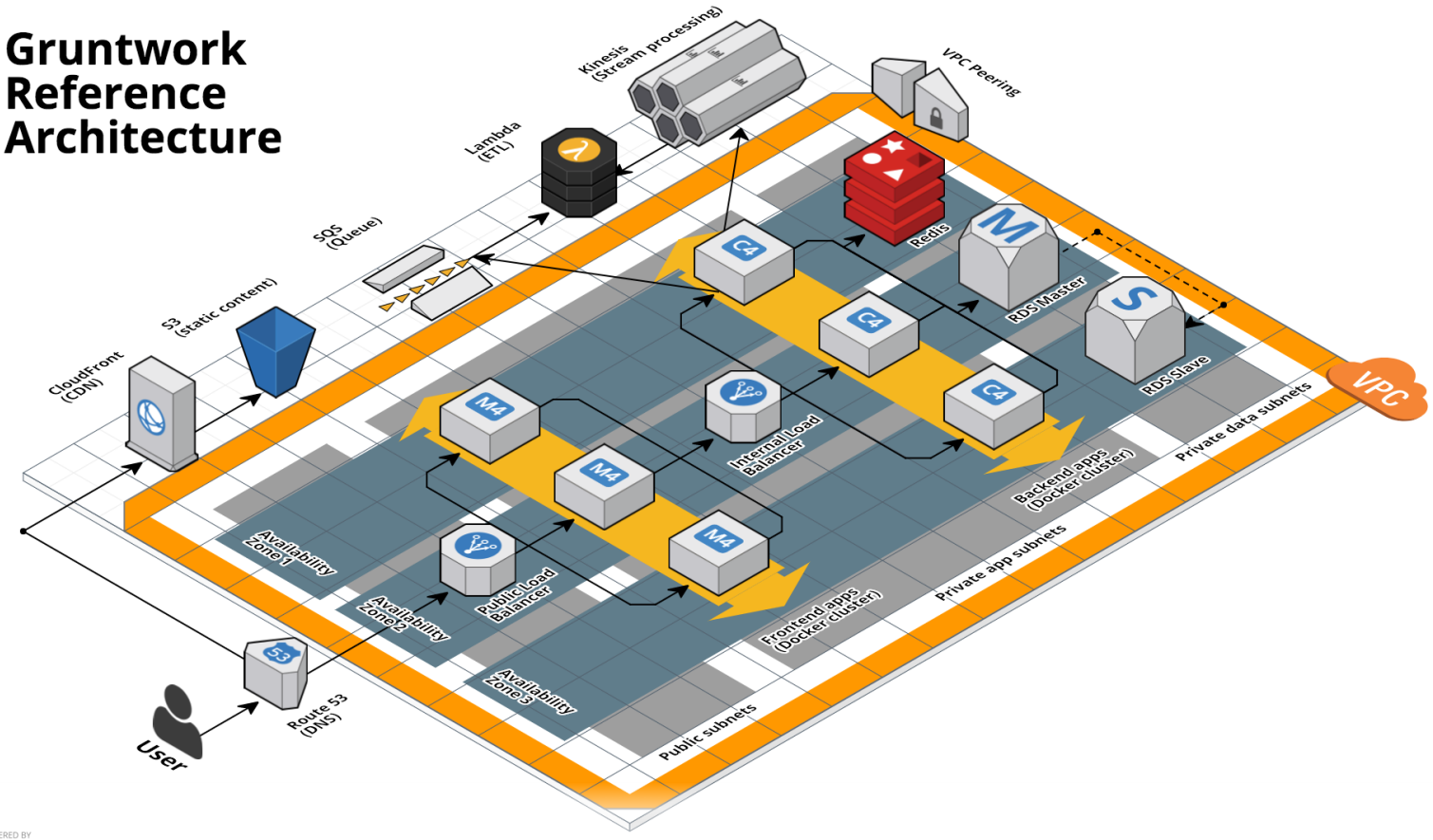
Large modules considered harmful.



What you really want is isolation for each environment

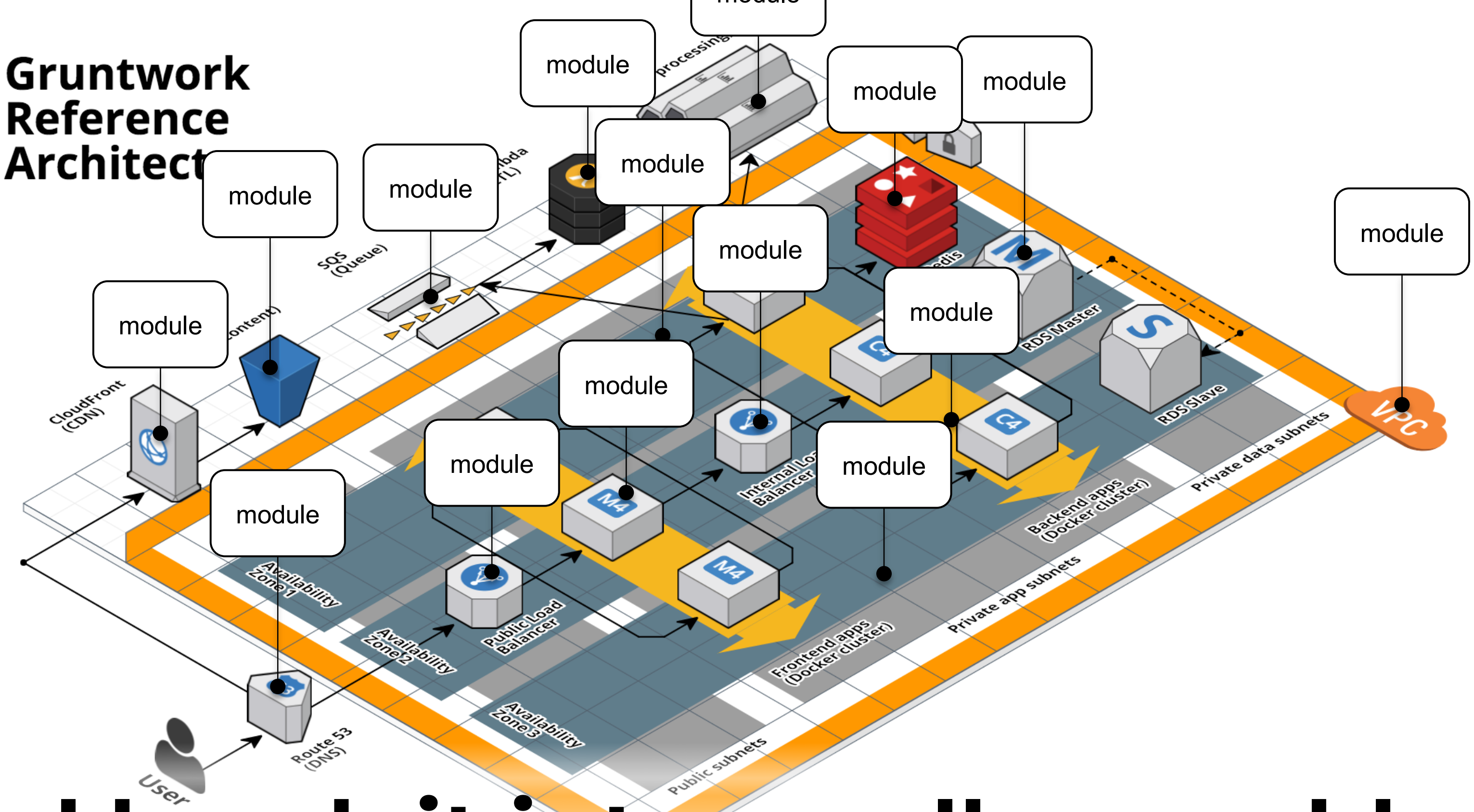


And for each “component”



POWERED BY CLOUDCRAFT.CO

Take your architecture...

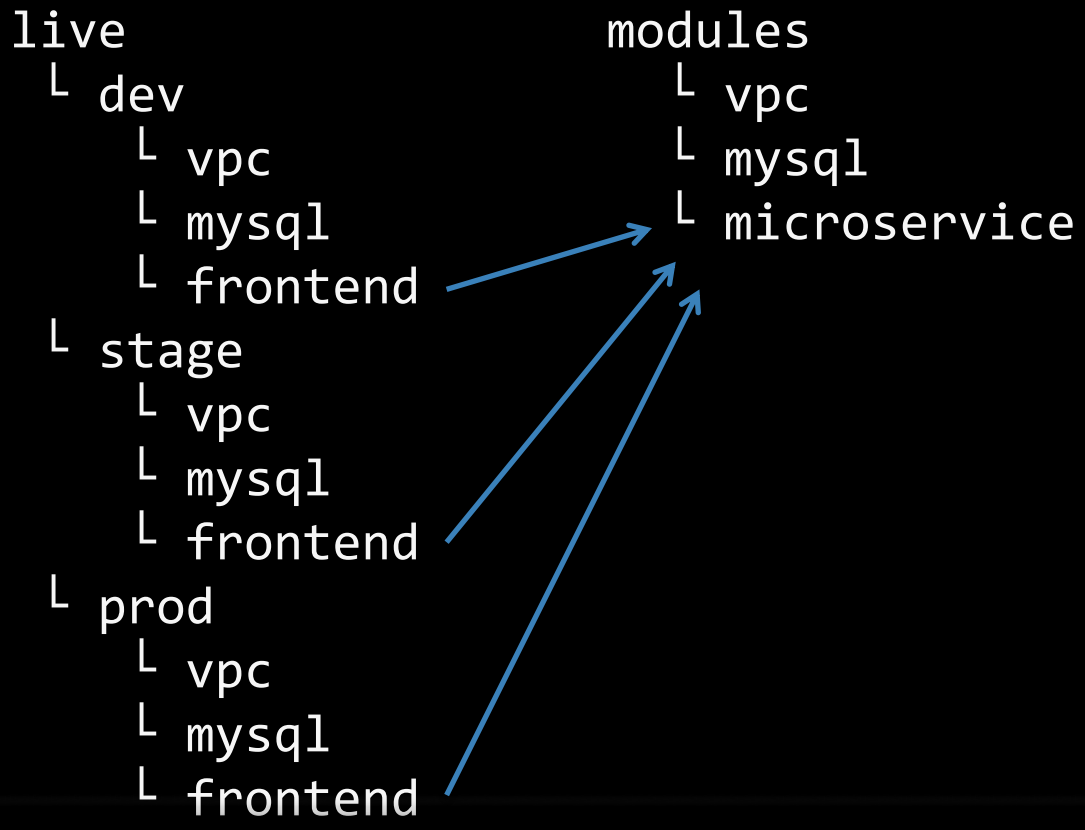


And break it into small, reusable, standalone, tested modules

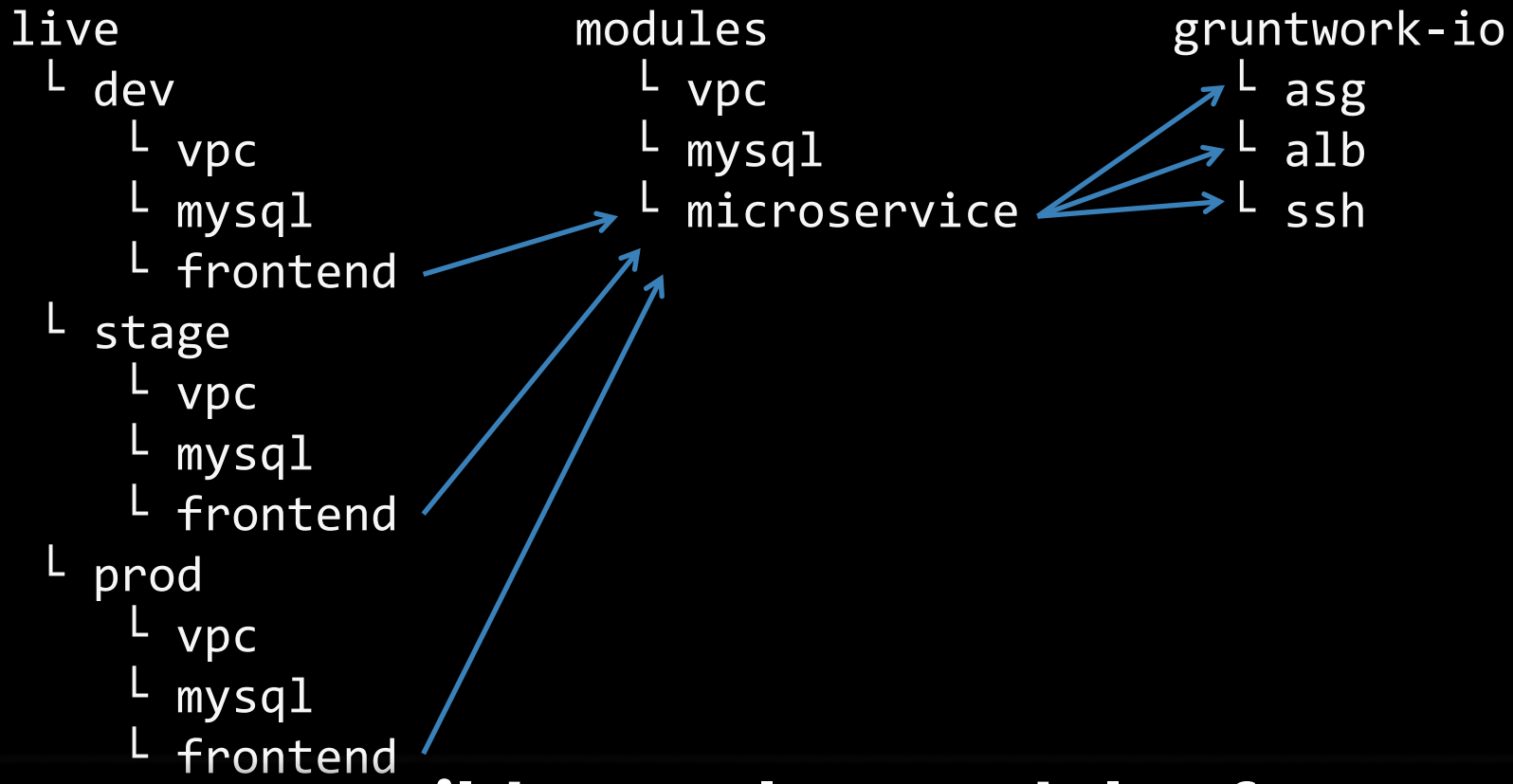
```
live
 └ dev
 └ stage
 └ prod
```

Break architecture down by environment

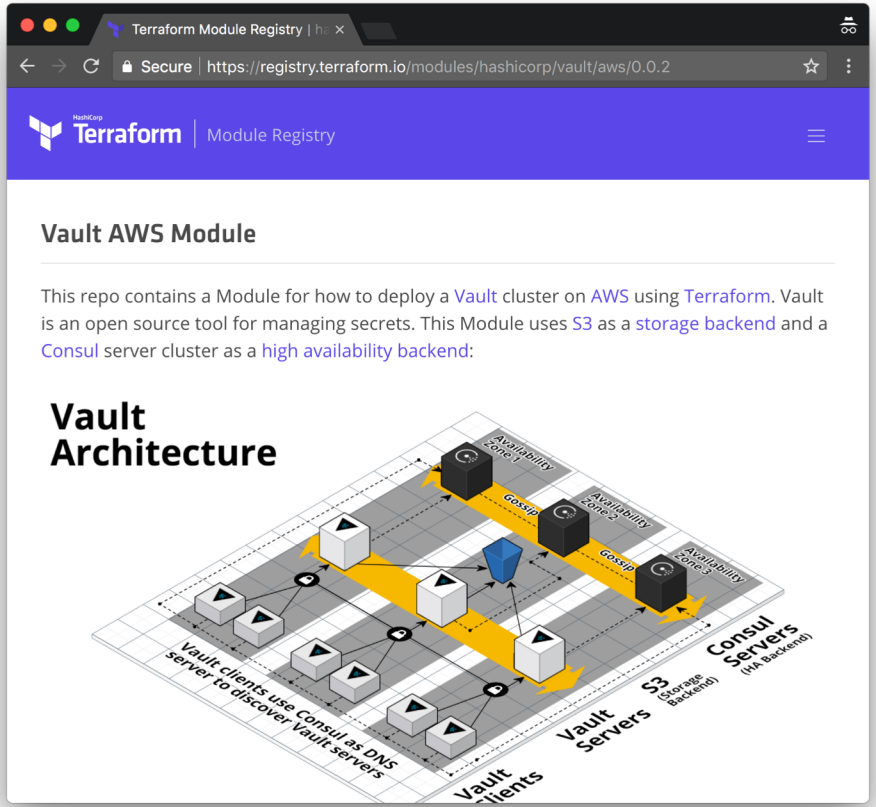
Break environments down by infrastructure type



Implement infrastructure in modules



Build complex modules from simpler modules



Example: Vault Modules

```
terraform-aws-vault
  └ modules
  └ examples
  └ test
  └ README.md
```

Typical repo has three key folders:
`/modules`, `/examples`, `/test`

```
terraform-aws-vault
  └ modules
    └ install-vault
    └ run-vault
    └ vault-cluster
    └ vault-elb
    └ vault-security-group-rules
  └ examples
  └ test
  └ README.md
```

/modules: implementation code, broken down into standalone sub-modules

```
terraform-aws-vault
  └ modules
    └ install-vault
       └ install-vault.sh
    └ run-vault
    └ vault-cluster
    └ vault-security-group-rules
    └ vault-elb
  └ examples
  └ test
  └ README.md
```

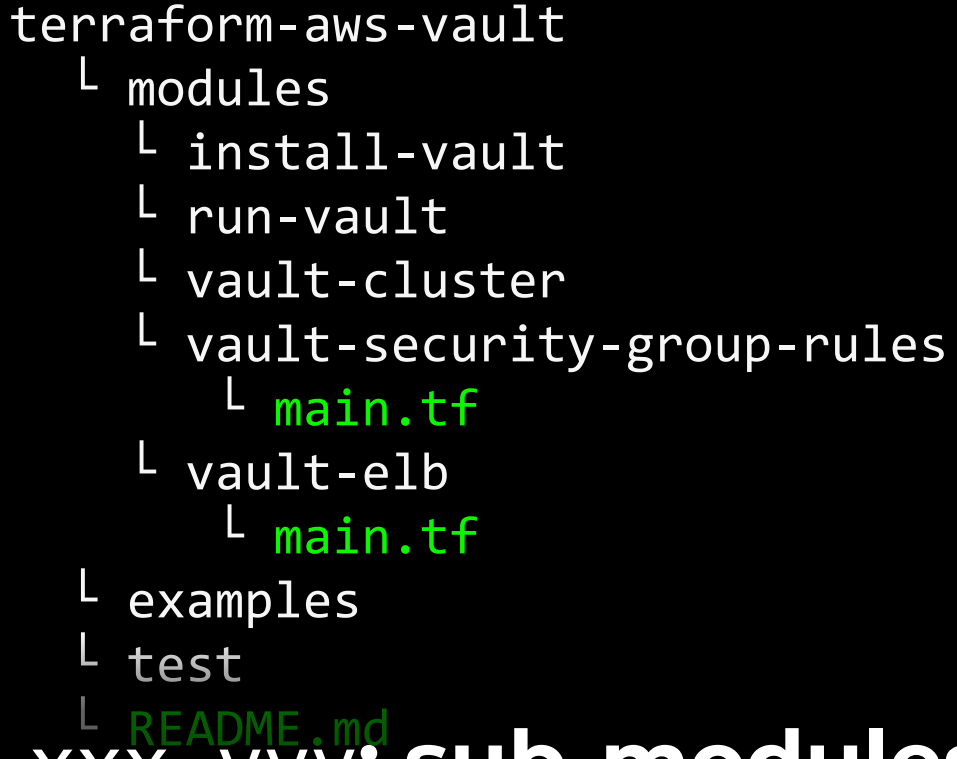
`install-xxx`: **sub-module to install the software (e.g., in Packer or Docker)**

```
terraform-aws-vault
  └ modules
    └ install-vault
    └ run-vault
       └ run-vault.sh
    └ vault-cluster
    └ vault-security-group-rules
    └ vault-elb
  └ examples
  └ test
  └ README.md
```

`run-xxx`: sub-module to launch the software during boot (e.g., in User Data)

```
terraform-aws-vault
  └ modules
    └ install-vault
    └ run-vault
    └ vault-cluster
       └ main.tf
    └ vault-security-group-rules
    └ vault-elb
  └ examples
  └ test
  └ README.md
```

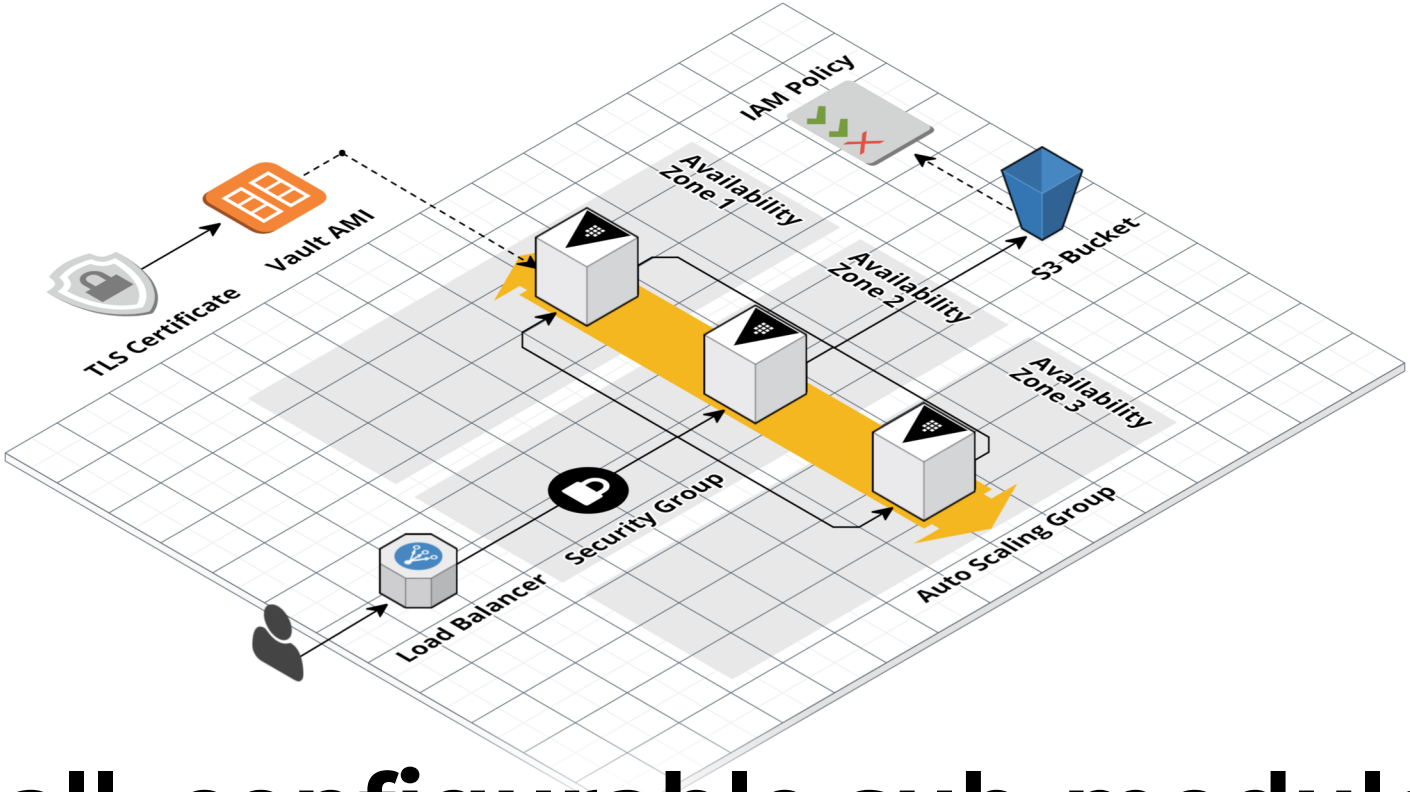
`xxx-cluster`: **sub-module to deploy infrastructure (e.g., into an ASG)**



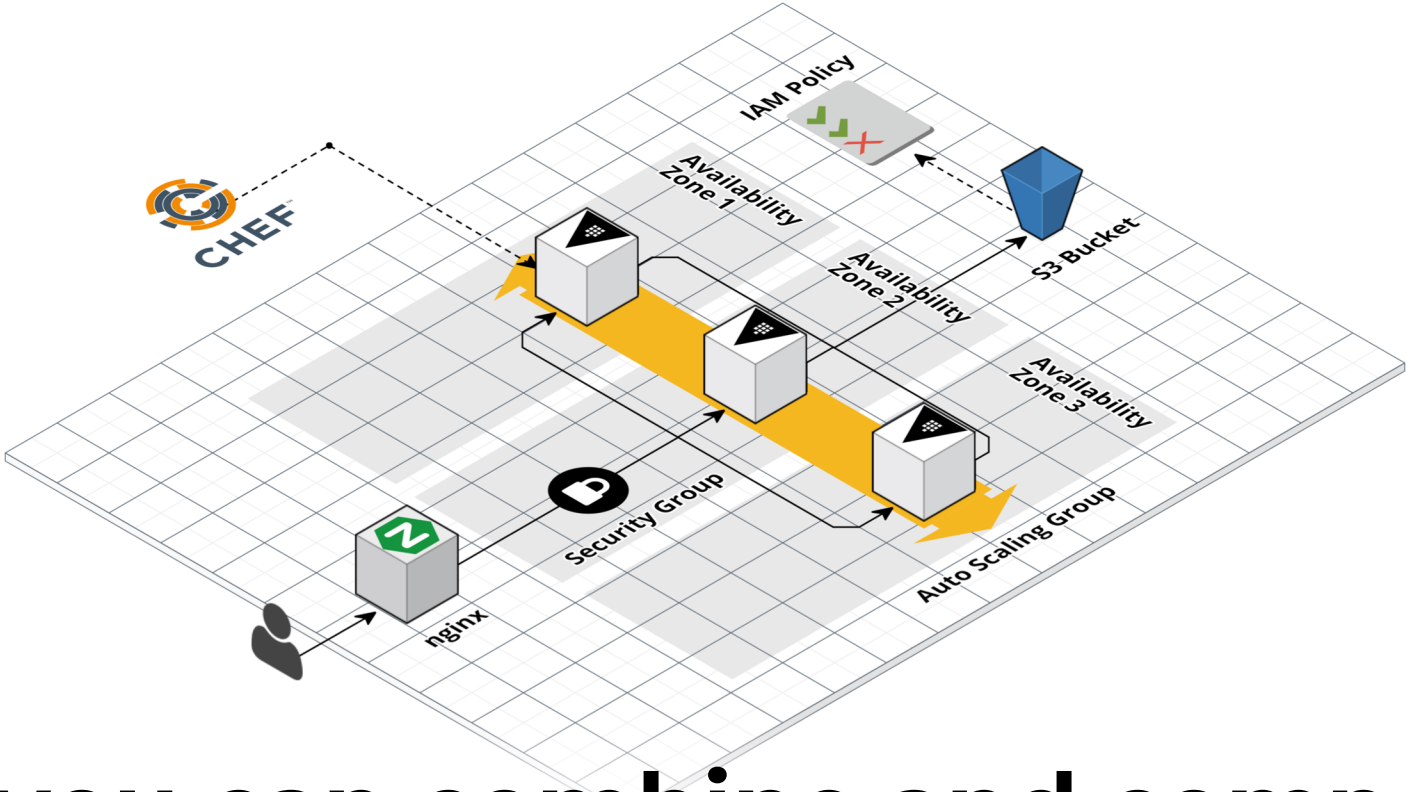
xxx-yyy: **sub-modules with shareable components (e.g., Security Group rules)**

```
variable "cluster_name" {
  description = "Name to use for the Vault cluster"
}

variable "vpc_id" {
  description = "ID of the VPC to use"
}

variable "allowed_inbound_cidr_blocks" {
  description = "IPs allowed to connect to Vault"
  type        = "list"
}
```

Each sub-module exposes variables for configuration and dependencies



Small, configurable sub-modules make code reuse possible



As you can combine and compose them any way you want!

```
terraform-aws-vault
  └ modules
  └ examples
    └ vault-with-elb
    └ vault-s3-backend
    └ vault-ami
  └ test
  └ README.md
```

/examples: Runnable example code for how to use the sub-modules

```
terraform-aws-vault
  └ modules
  └ examples
    └ vault-with-elb
      └ main.tf
    └ vault-s3-backend
      └ main.tf
    └ vault-ami
  └ test
  └ README.md
```

Some examples are Terraform code

```
terraform-aws-vault
  └ modules
  └ examples
    └ vault-with-elb
    └ vault-s3-backend
    └ vault-ami
       └ vault.json
  └ test
  └ README.md
```

Some examples are Packer templates or Dockerfiles

```
terraform-aws-vault
  └ modules
  └ examples
  └ test
     └ vault_with_elb_test.go
     └ vault_s3_backend_test.go
  └ README.md
```

/tests: Automated tests for the sub-modules.

```
terraform-aws-vault
  └ modules
  └ examples
    └ vault-with-elb
    └ vault-s3-backend
  └ test
     └ vault_with_elb_test.go
     └ vault_s3_backend_test.go
  └ README.md
```

Typically, our tests deploy & validate each example! More on this later.

Key takeaway: build infrastructure from small, composable modules.

Outline

1. Checklist
2. Tools
3. Modules
4. Tests
5. Releases

Infrastructure code rots very quickly.

~~Infrastructure code rots very quickly.~~

Infrastructure code without automated tests is broken.

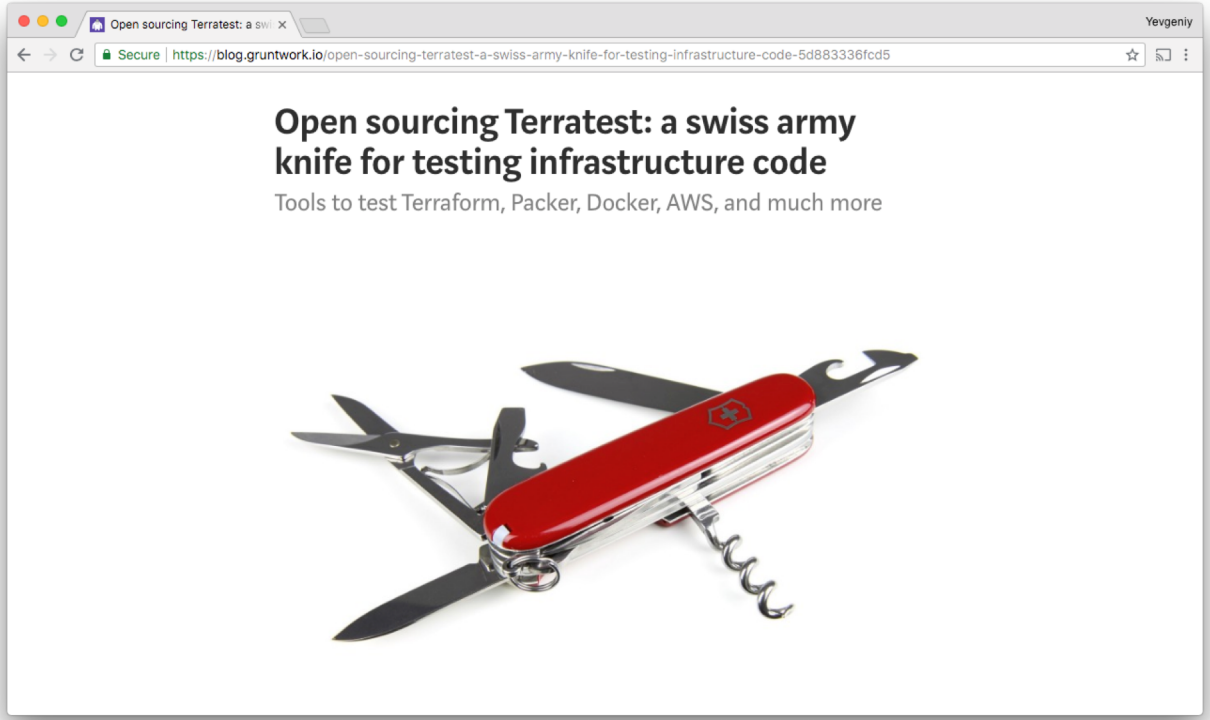
For general-purpose languages, we can run unit tests on localhost

Terraform

For infrastructure as code tools, there is no “localhost” or “unit”

Therefore, the test strategy is:

1. Deploy real infrastructure
2. Validate it works
3. Undeploy the infrastructure



We write these integration tests in Go using Terratest (open source!)

Terratest philosophy: how would you test it manually?

```
terraformOptions := &terraform.Options {
  TerraformDir: "../examples/vault-with-elb",
}

defer terraform.Destroy(t, terraformOptions)

terraform.InitAndApply(t, terraformOptions)

validateServerIsWorking(t, terraformOptions)
```

Typical test structure

```
terraformOptions := &terraform.Options {
  TerraformDir: "../examples/vault-with-elb",
}

defer terraform.Destroy(t, terraformOptions)

terraform.InitAndApply(t, terraformOptions)

validateServerIsWorking(t, terraformOptions)
```

Specify where the code lives

```
terraformOptions := &terraform.Options {
  TerraformDir: "../examples/vault-with-elb",
}

defer terraform.Destroy(t, terraformOptions)

terraform.InitAndApply(t, terraformOptions)

validateServerIsWorking(t, terraformOptions)
```

Run `terraform init` **and** `terraform apply` **to deploy**

```
terraformOptions := &terraform.Options {
  TerraformDir: "../examples/vault-with-elb",
}

defer terraform.Destroy(t, terraformOptions)

terraform.InitAndApply(t, terraformOptions)

validateServerIsWorking(t, terraformOptions)
```

Validate the infrastructure works as expected

```
// Get IPs of servers
aws.GetPublicIpsOfEc2Instances(t, ids, region)

// Make HTTP requests in a retry loop
http.GetWithRetry(t, url, 200, expected, retries, sleep)

// Run command over SSH
ssh.CheckSshCommand(t, host, "vault operator init")
```

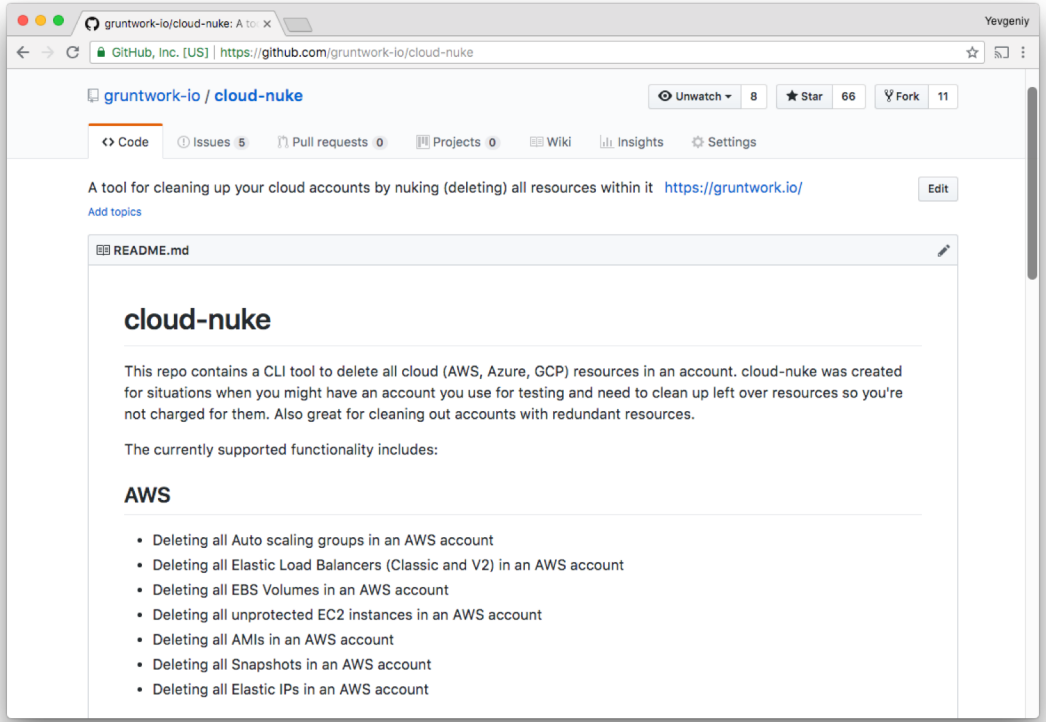
Terratest has many tools built-in for validation

```
terraformOptions := &terraform.Options {
  TerraformDir: "../examples/vault-with-elb",
}

defer terraform.Destroy(t, terraformOptions)

terraform.InitAndApply(t, terraformOptions)

validateServerIsWorking(t, terraformOptions)
```

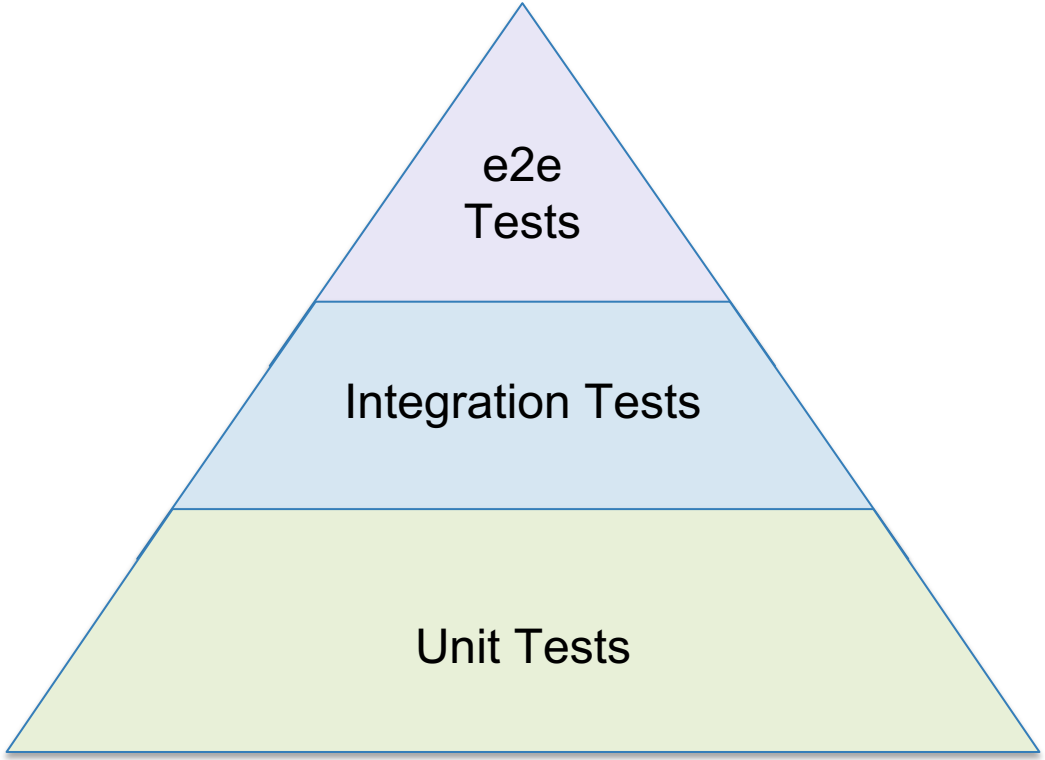
At the end of the test, run `terraform destroy` to clean up

Note: tests create and destroy lots of resources!

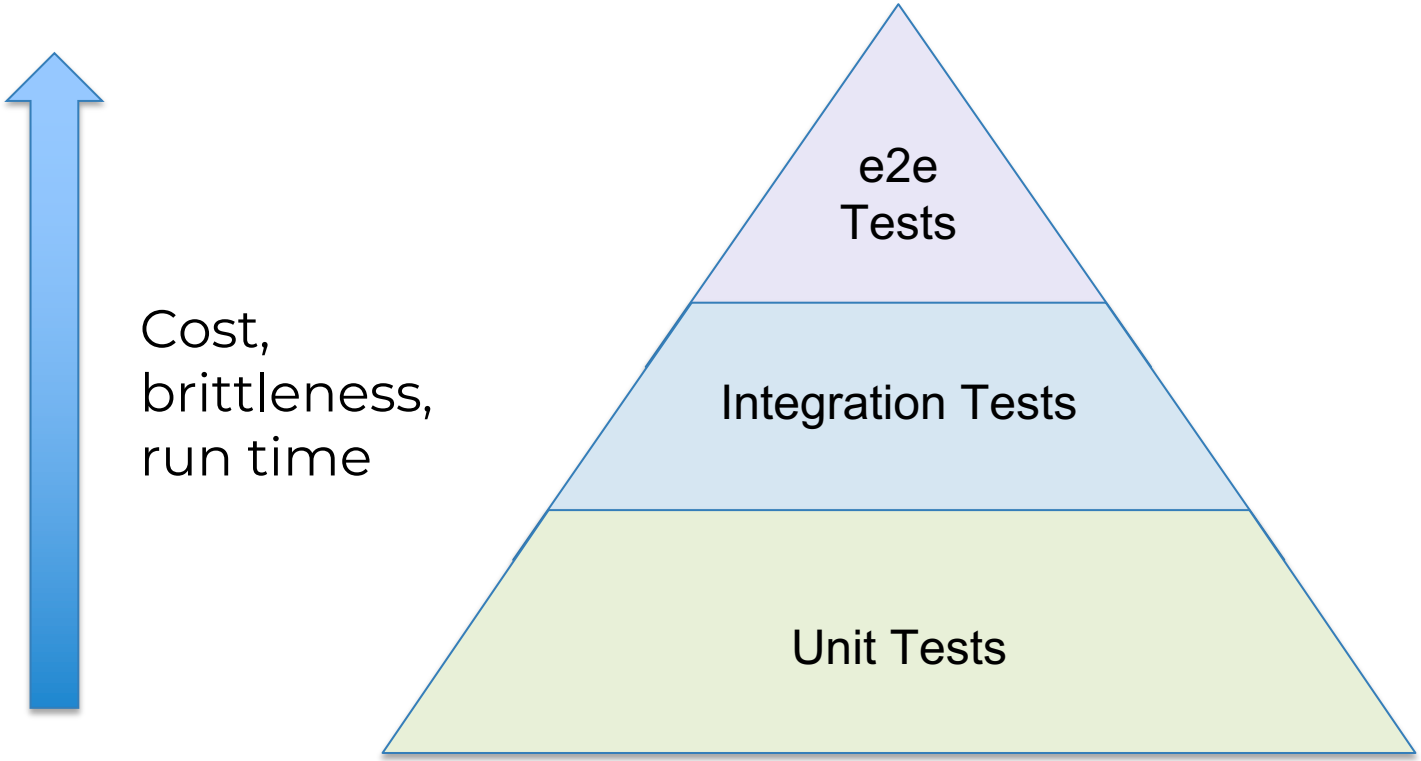

Pro tip #1: run tests in completely separate “sandbox” accounts



Pro tip #2: clean up left-over resources with cloud-nuke.

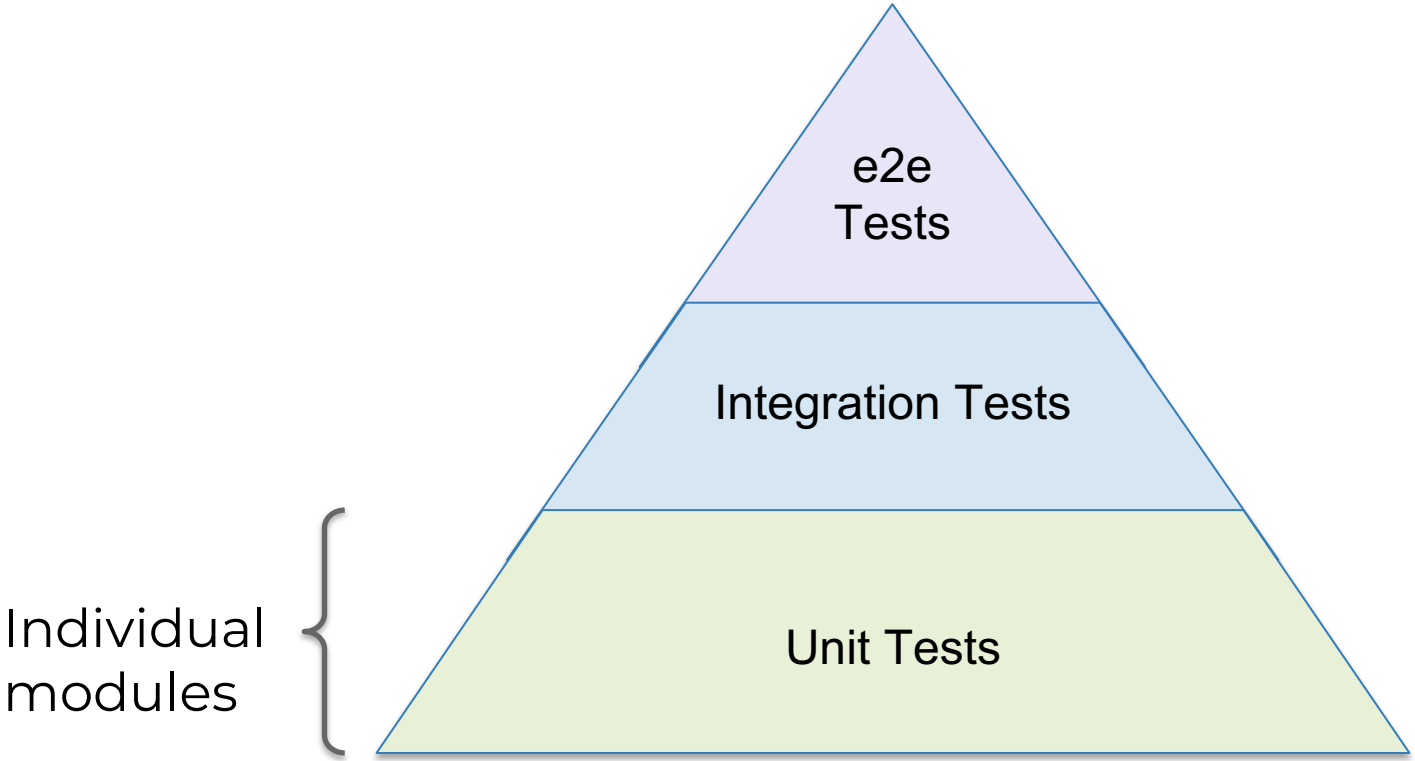


Test pyramid

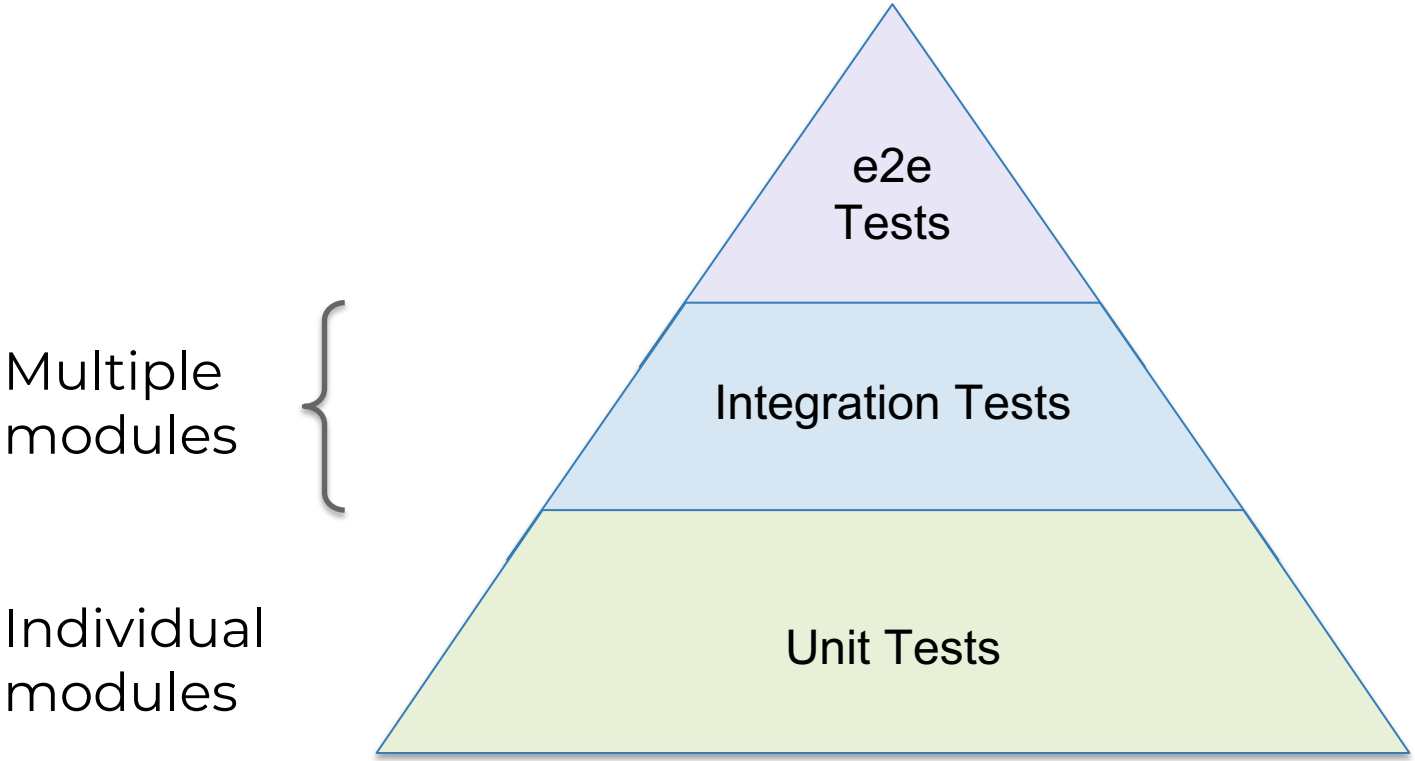


As you go up the pyramid, tests get more expensive, brittle, and slower

How the test pyramid works with infrastructure code:



Unit tests for infrastructure: test individual sub-modules (keep ‘em small!)

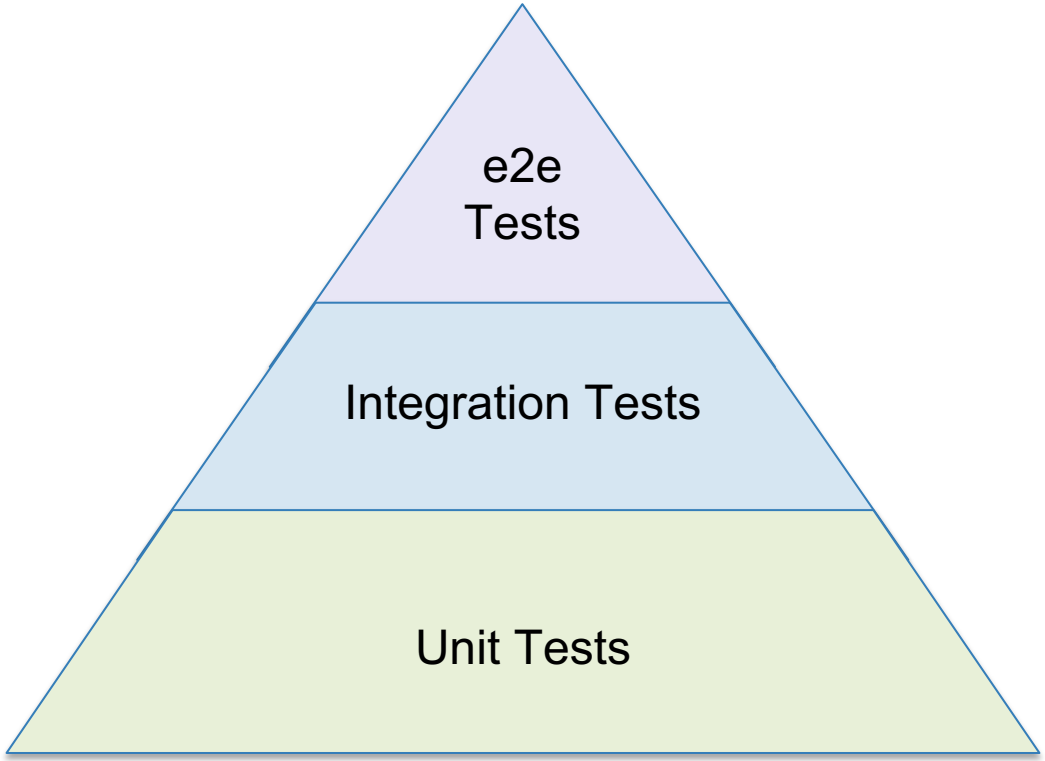


Integration tests for infrastructure: test multiple sub-modules together.

Entire stack

Multiple modules

Individual modules

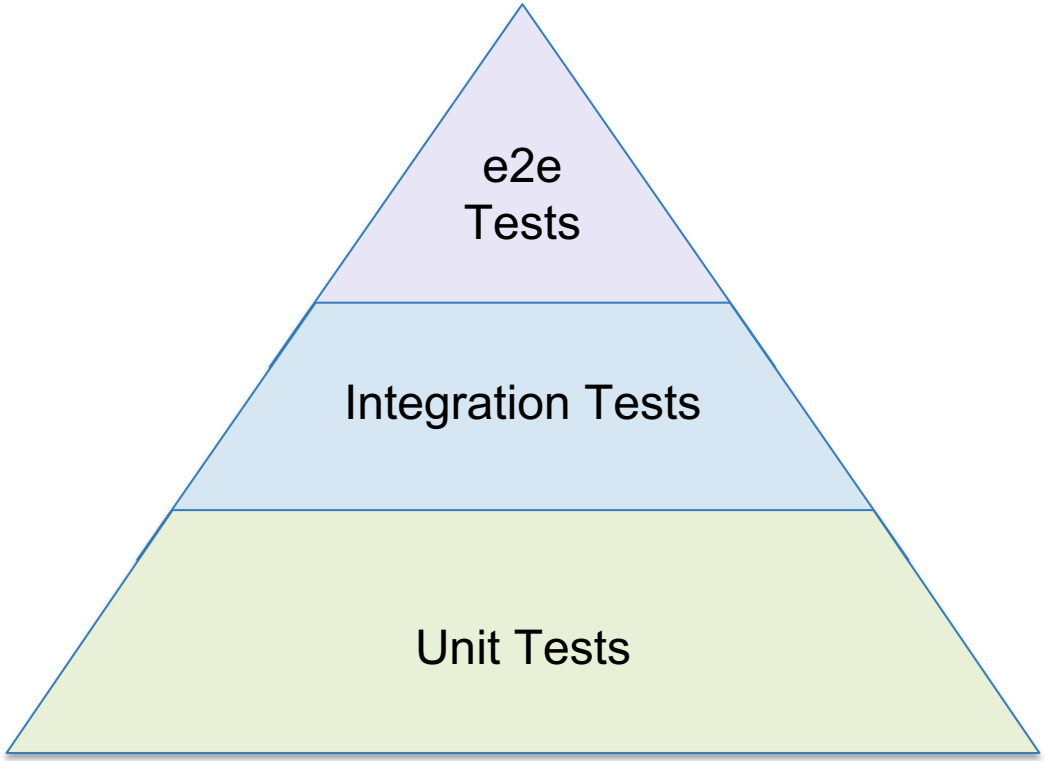


E2E tests for infrastructure code: test entire environments (stage, prod).

30 – 120+ minutes

5 – 60 minutes

1 – 20 minutes



Note the test times! This is another reason to use small modules.

Key takeaway: infrastructure code without automated tests is broken.

Outline

1. Checklist
2. Tools
3. Modules
4. Tests
5. Releases

Let’s put it all together: checklist, tools, modules, tests

Task	Description	Example tools
Security	Encryption in transit (TLS) and on disk, authentication, authorization, secrets management, server hardening.	ACM, EBS Volumes, Cognito, Vault, CiS
Monitoring	Availability metrics, business metrics, app metrics, server, metrics, events, observability, tracing, alerting.	CloudWatch, DataDog, New Relic, Honeycomb
Logs	Rotate logs on disk. Aggregate log data to a central location.	CloudWatch Logs, ELK, Sumo Logic, Papertrail
Backup and restore	Make backups of DBs, caches, and other data on a scheduled basis. Replicate to separate region/account.	RDS, ElastiCache, ec2-snapper, Lambda

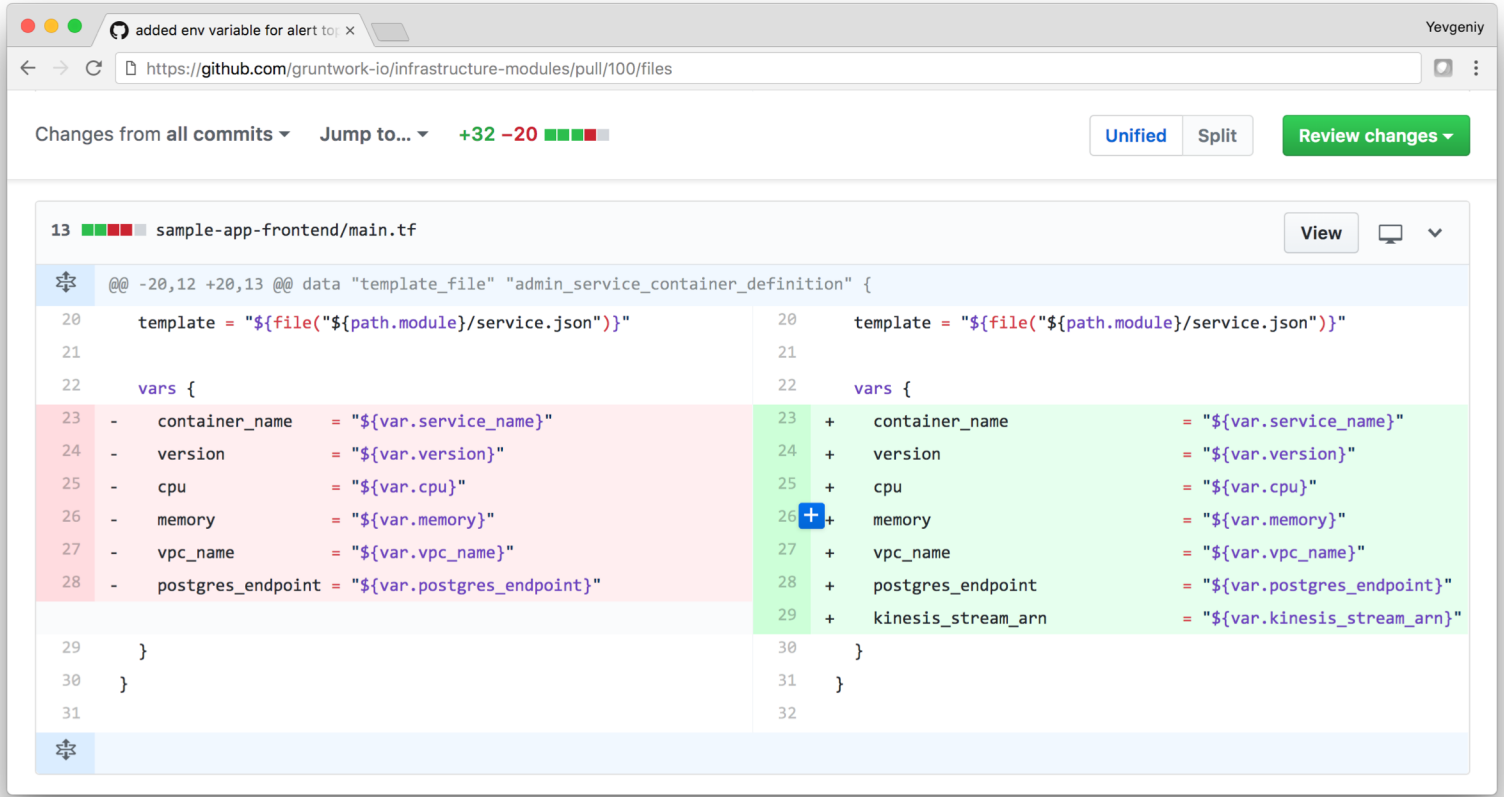
1. Go through the checklist

```
provider "aws" {
  region = "us-east-1"
}

resource "aws_instance" "example" {
  ami           = "ami-408c7f28"
  instance_type = "t2.micro"
}
```

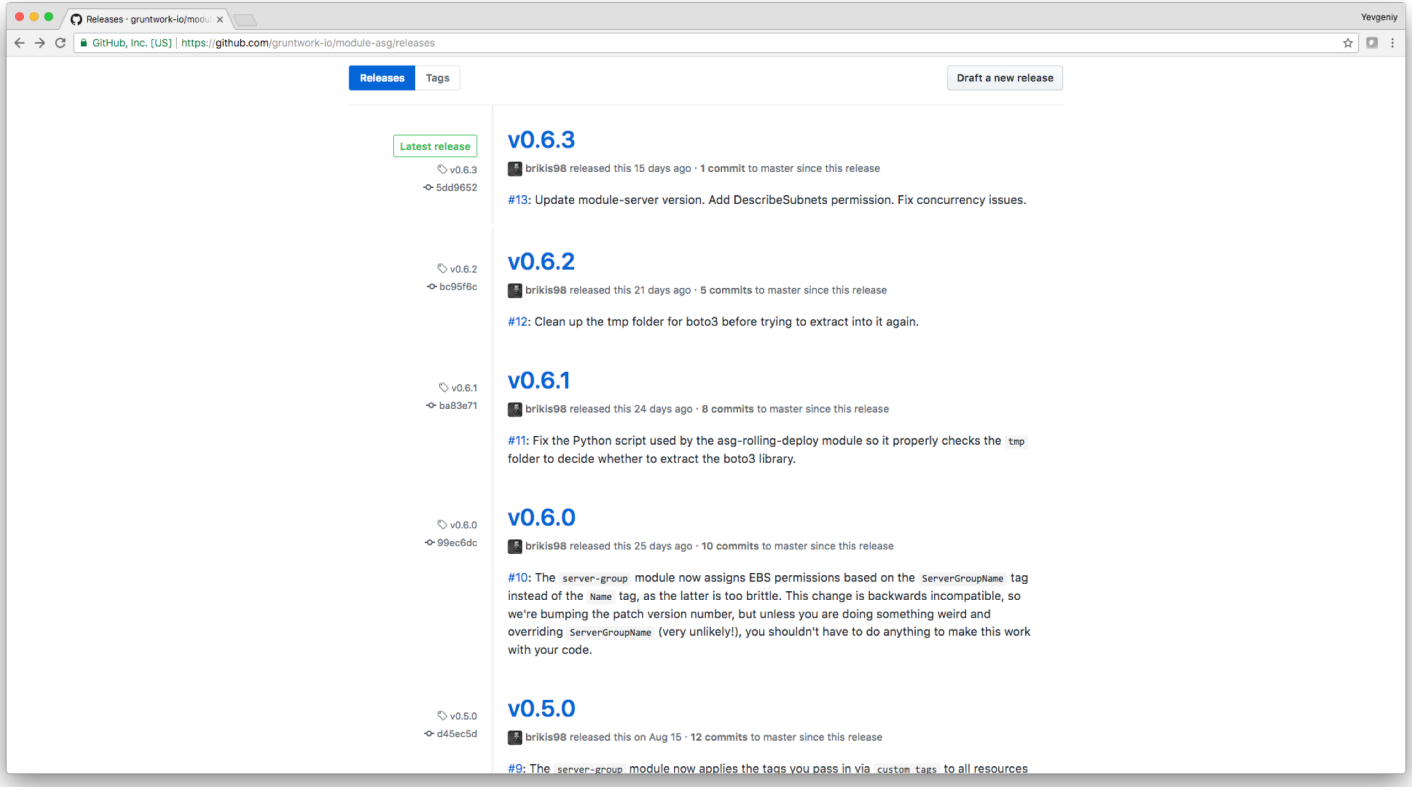
2. Write some code

```
terraformOptions := &terraform.Options {
  TerraformDir: "../examples/vault-with-elb",
}

defer terraform.Destroy(t, terraformOptions)

terraform.InitAndApply(t, terraformOptions)

validateServerIsWorking(t, terraformOptions)
```

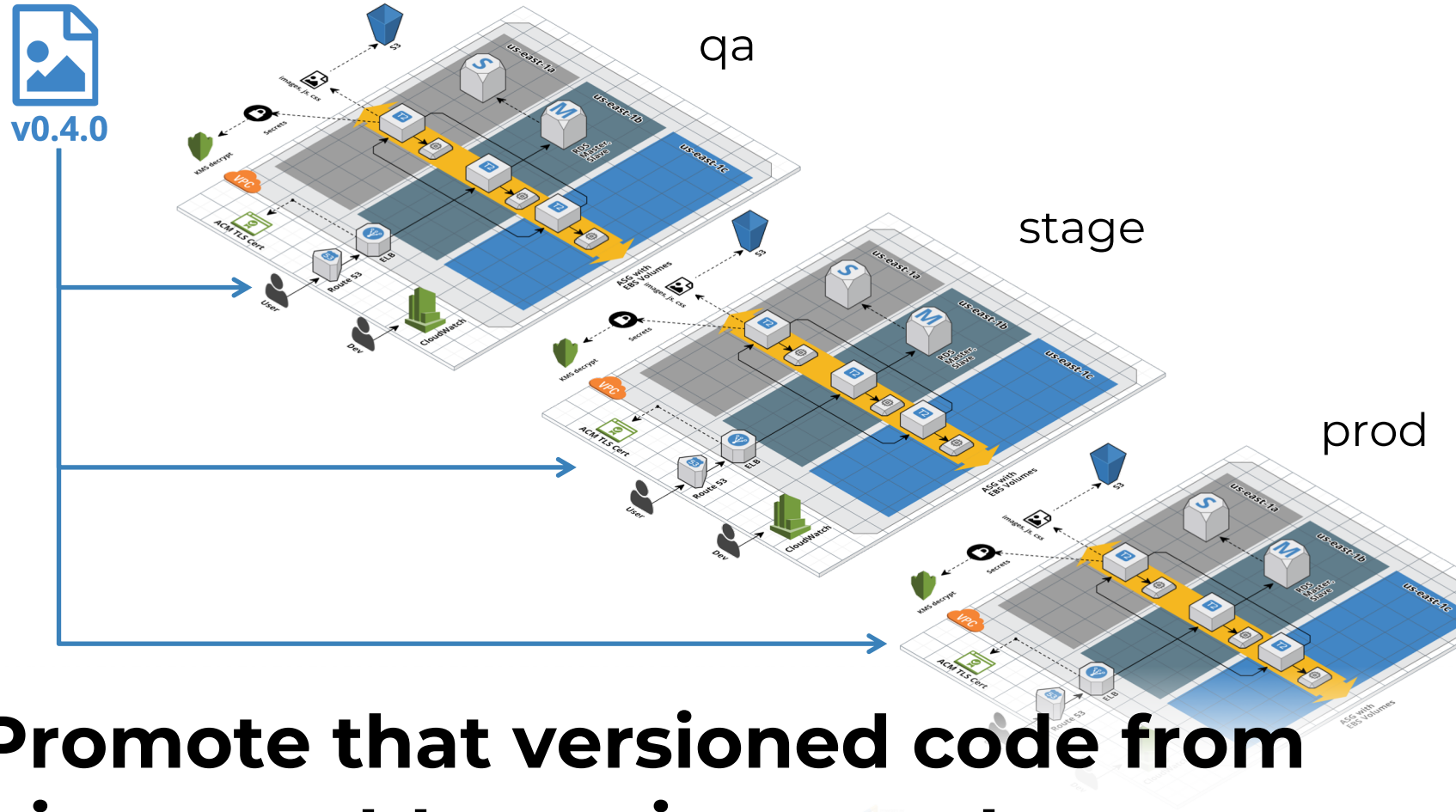
3. Write automated tests



4. Do a code review



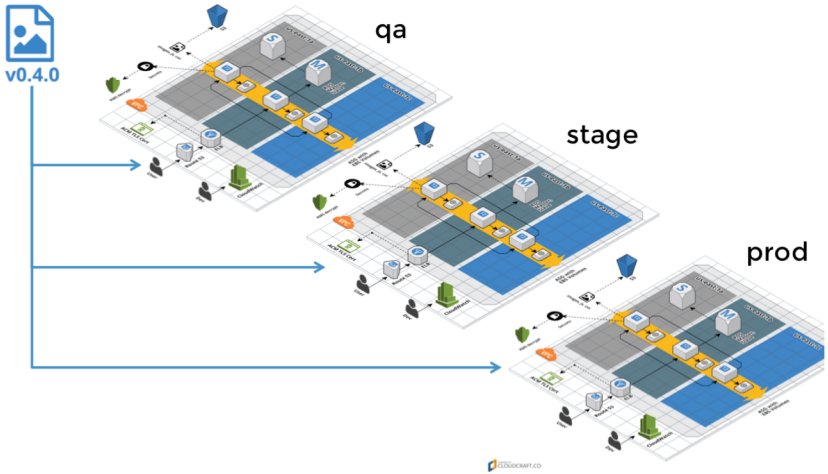
5. Release a new version of your code



6. Promote that versioned code from environment to environment

Key takeaway:

Before...



...After


Questions?
info@gruntwork.io