

# Hands-On Enterprise Automation on Linux

Efficiently perform large-scale Linux infrastructure automation with Ansible



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James Freeman

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**James Freeman**



**BIRMINGHAM - MUMBAI**

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*This book is dedicated to everyone who has inspired me to follow my dreams,  
my passions, and live my truth, especially Lyndon Rees, Eleonora Guantini, Elane Slade,  
and the late Sirdar Khan.*



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# Foreword

Few would disagree when I say that the world of technology has grown ever more complex over the last couple of decades since the internet came to prominence. More and more products have arrived, promising us solutions to tame the growing complexity. Along with the promises come a raft of experts, there to help us through what is actually yet more complexity.

2012 saw the first release of Ansible. By 2013, it was gaining significant traction since its promise of power through simplicity was not an empty one. Here was a technology rooted in a simple truth—solving problems with technology really means solving problems for people. Therefore, people matter. A tool that is easy to pick up and learn? What an amazing thought! Early adopters were those who saw through the functionality list to realize that here was a people-pleasing game changer.

I first met James at one of his technical Ansible talks a few years ago. It was still relatively early days for Ansible, although we'd just been acquired by Red Hat. At that first meeting, I realized that here was a fellow who understood the link between people and Ansible's powerful simplicity. I've been lucky enough to see James speak on a number of occasions since, with two standout talks coming to mind.

At AnsibleFest 2018 in Austin, Texas, James gave a great talk about a client engagement where he presided over a business-critical database upgrade—on a Friday afternoon. What's the golden rule we all tout in tech? Don't make business-critical changes on a Friday! Yet James's charismatic storytelling had the audience enthralled. The second occasion was more recent, at an Ansible London meetup. Taking a very different approach to the usual tech-heavy talks, James presented the audience with a tale of positive psychology, a story that had Ansible as the underlying tool supporting people. It turned out to be a great success, sparking a lively interaction across the audience during the Q&A session that followed.

Scalability isn't just about a technology; it is about people. If you want a technology to scale, it must be easy for people to adopt, to master, and to share. James is a model of scalability himself, as he so readily shares his knowledge. He also shows in this book that Ansible is an orchestrator, a conductor of the symphony if you like, with the ability to span an enterprise. I'm sure you'll enjoy reading it as much as I've enjoyed every interaction I've had with James.

**Mark Phillips**

Product Marketing Manager, Red Hat Ansible

I've worked alongside James for several years and consider him to be one of the foremost Ansible experts in the world. I've been witness to his help in the digital modernization efforts of large and small organizations with the help of automation and DevOps practices.

In *Hands-On Enterprise Automation on Linux*, James generously shares his experience with a practical, no-nonsense approach to managing heterogeneous Linux environments. If you learn best through a hands-on approach, then this is the book for you. James provides plenty of in-depth examples in each chapter so that you can cement your understanding and feel prepared to take Ansible into a live environment.

Ready to become an automation rockstar and revolutionize your IT ops team? Then read on!

**Ben Strauss**

Security Automation Manager, MindPoint Group

# Contributors

## About the author

**James Freeman** is an accomplished IT consultant and architect with over 20 years' experience in the technology industry. He has more than 7 years of first-hand experience of solving real-world enterprise problems in production environments using Ansible, frequently introducing Ansible as a new technology to businesses and CTOs for the first time. He has a passion for positive psychology and its application in the world of technology and, in addition, has authored and facilitated bespoke Ansible workshops and training sessions, and has presented at both international conferences and meetups on Ansible.



## About the reviewers

**Gareth Coffey** is an automation consultant for Cachesure, based in London, developing bespoke solutions to enable companies to migrate services to public and private cloud platforms. Gareth has been working with Unix/Linux-based systems for over 15 years. During that time, he has worked with a multitude of different programming languages, including C, PHP, Node.js, and various automation and orchestration tool sets. As well as consulting, Gareth runs his own start-up – Progressive Ops, developing cloud-based services aimed at helping start-up companies deploy resources across multiple cloud providers, with a focus on security.

*Thanks to my wife and daughter for putting up with the late nights and early mornings.*

**Iain Grant** is a senior engineer with over 20 years' experience as an IT professional, in both small and enterprise companies, where he has held a wide variety of positions, including trainer, programmer, firmware engineer, and system administrator. During this time, he has worked on multiple operating systems, ranging from OpenVMS, through Windows, to Linux, where he has also contributed to the Alpha Linux kernel. He currently works in an enterprise environment looking after over 300 Linux servers, with responsibility for their automation and management.

*I would recommend this book as standard reading for any professional or senior engineer working with Linux. The areas covered provide you with excellent guidance and examples of a controlled build, as well as a managed and secure environment, resulting in an easier life for anyone looking after small or large Linux estates.*

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# Table of Contents

<b>Preface</b>	1
<b>Section 1: Core Concepts</b>	
<b>Chapter 1: Building a Standard Operating Environment on Linux</b>	8
<b>Understanding the challenges of Linux environment scaling</b>	9
Challenges of non-standard environments	9
Early growth of a non-standard environment	9
Impacts of non-standard environments	10
Scaling up non-standard environments	10
Addressing the challenges	11
Security	12
Reliability	13
Scalability	13
Longevity	14
Supportability	15
Ease of use	16
<b>What is an SOE?</b>	16
Defining the SOE	16
Knowing what to include	18
<b>Exploring SOE benefits</b>	20
Example benefits of an SOE in a Linux environment	20
Benefits of SOE to software testing	22
<b>Knowing when to deviate from standards</b>	24
<b>Ongoing maintenance of SOEs</b>	25
<b>Summary</b>	26
<b>Questions</b>	27
<b>Further reading</b>	27
<b>Chapter 2: Automating Your IT Infrastructure with Ansible</b>	28
<b>Technical requirements</b>	29
<b>Exploring the Ansible playbook structure</b>	29
<b>Exploring inventories in Ansible</b>	35
<b>Understanding roles in Ansible</b>	42
<b>Understanding Ansible variables</b>	47
<b>Understanding Ansible templates</b>	52
<b>Bringing Ansible and the SOE together</b>	56
<b>Summary</b>	57
<b>Questions</b>	58
<b>Further reading</b>	58

<b>Chapter 3: Streamlining Infrastructure Management with AWX</b>	59
<b>Technical requirements</b>	60
<b>Introduction to AWX</b>	60
AWX reduces training requirements	61
AWX enables auditability	61
AWX supports version control	62
AWX helps with credential management	63
Integrating AWX with other services	63
<b>Installing AWX</b>	64
<b>Running your playbooks from AWX</b>	70
Setting up credentials in AWX	71
Creating inventories in AWX	72
Creating a project in AWX	75
Creating a template in AWX	79
Running a playbook from AWX	80
<b>Automating routine tasks with AWX</b>	84
<b>Summary</b>	88
<b>Questions</b>	88
<b>Further reading</b>	89
<b>Section 2: Standardizing Your Linux Servers</b>	
<hr/>	
<b>Chapter 4: Deployment Methodologies</b>	91
<b>Technical requirements</b>	92
<b>Knowing your environment</b>	92
Deploying to bare-metal environments	92
Deploying to traditional virtualization environments	93
Deploying to cloud environments	95
Docker deployments	98
<b>Keeping builds efficient</b>	100
Keeping your builds simple	100
Making your builds secure	102
Creating efficient processes	103
<b>Ensuring consistency across Linux images</b>	103
<b>Summary</b>	106
<b>Questions</b>	107
<b>Further reading</b>	107
<b>Chapter 5: Using Ansible to Build Virtual Machine Templates for Deployment</b>	108
<b>Technical requirements</b>	109
<b>Performing the initial build</b>	109
Using ready-made template images	110
Creating your own virtual machine images	112
<b>Using Ansible to build and standardize the template</b>	120

Transferring files into the image	121
Installing packages	125
Editing configuration files	130
Validating the image build	133
Putting it all together	137
<b>Cleaning up the build with Ansible</b>	139
<b>Summary</b>	141
<b>Questions</b>	142
<b>Further reading</b>	142
<b>Chapter 6: Custom Builds with PXE Booting</b>	143
<b>Technical requirements</b>	144
<b>PXE booting basics</b>	144
Installing and configuring PXE-related services	145
Obtaining network installation images	149
Performing your first network boot	152
<b>Performing unattended builds</b>	158
Performing unattended builds with kickstart files	158
Performing unattended builds with pre-seed files	167
<b>Adding custom scripts to unattended boot configurations</b>	171
Customized scripting with kickstart	171
Customized scripting with pre-seed	172
<b>Summary</b>	173
<b>Questions</b>	173
<b>Further reading</b>	174
<b>Chapter 7: Configuration Management with Ansible</b>	175
<b>Technical requirements</b>	176
<b>Installing new software</b>	176
Installing a package from operating system default repositories	177
Installing non-native packages	182
Installing unpackaged software	183
<b>Making configuration changes with Ansible</b>	184
Making small configuration changes with Ansible	185
Maintaining configuration integrity	187
<b>Managing configuration at an enterprise scale</b>	189
Making scalable static configuration changes	190
Making scalable dynamic configuration changes	196
<b>Summary</b>	203
<b>Questions</b>	203
<b>Further reading</b>	203
<b>Section 3: Day-to-Day Management</b>	
<b>Chapter 8: Enterprise Repository Management with Pulp</b>	205

<b>Technical requirements</b>	206
<b>Installing Pulp for patch management</b>	206
Installing Pulp	207
<b>Building repositories in Pulp</b>	214
Building RPM-based repositories in Pulp	214
Building DEB-based repositories in Pulp	220
<b>Patching processes with Pulp</b>	223
RPM-based patching with Pulp	224
DEB-based patching with Pulp	230
<b>Summary</b>	234
<b>Questions</b>	235
<b>Further reading</b>	235
<b>Chapter 9: Patching with Katello</b>	236
<b>Technical requirements</b>	236
<b>Introduction to Katello</b>	237
<b>Installing a Katello server</b>	239
Preparing to install Katello	239
<b>Patching with Katello</b>	242
Patching RPM-based systems with Katello	243
Patching DEB-based systems with Katello	261
<b>Summary</b>	266
<b>Questions</b>	267
<b>Further reading</b>	267
<b>Chapter 10: Managing Users on Linux</b>	268
<b>Technical requirements</b>	268
<b>Performing user account management tasks</b>	269
Adding and modifying users with Ansible	270
Removing users with Ansible	276
<b>Centralizing user account management with LDAP</b>	277
Microsoft AD	278
FreeIPA	281
<b>Enforcing and auditing configuration</b>	284
Managing sudoers with Ansible	284
Auditing user accounts with Ansible	286
<b>Summary</b>	288
<b>Questions</b>	289
<b>Further reading</b>	289
<b>Chapter 11: Database Management</b>	290
<b>Technical requirements</b>	291
<b>Installing databases with Ansible</b>	291
Installing MariaDB server with Ansible	291
Installing PostgreSQL Server with Ansible	300

<b>Importing and exporting data</b>	306
Automating MariaDB data loading with Ansible	306
<b>Performing routine maintenance</b>	318
Routine maintenance on PostgreSQL with Ansible	318
<b>Summary</b>	322
<b>Questions</b>	322
<b>Further reading</b>	323
<b>Chapter 12: Performing Routine Maintenance with Ansible</b>	324
<b>Technical requirements</b>	325
<b>Tidying up disk space</b>	325
<b>Monitoring for configuration drift</b>	331
<b>Understanding process management with Ansible</b>	337
<b>Rolling updates with Ansible</b>	342
<b>Summary</b>	346
<b>Questions</b>	346
<b>Further reading</b>	347
<b>Section 4: Securing Your Linux Servers</b>	
<hr/>	
<b>Chapter 13: Using CIS Benchmarks</b>	349
<b>Technical requirements</b>	350
<b>Understanding CIS Benchmarks</b>	350
What is a CIS Benchmark?	350
Exploring CIS Benchmarks in detail	352
<b>Applying security policy wisely</b>	355
Applying the SELinux security policy	356
Mounting of filesystems	356
Installing Advanced Intrusion Detection Environment (AIDE)	357
Understanding CIS Service benchmarks	358
X Windows	358
Allowing hosts by network	358
Local firewalls	359
Overall guidance on scoring	359
<b>Scripted deployment of server hardening</b>	360
Ensuring SSH root login is disabled	360
Ensuring packet redirect sending is disabled	365
Running CIS Benchmark scripts from a remote location	368
<b>Summary</b>	371
<b>Questions</b>	371
<b>Further reading</b>	372
<b>Chapter 14: CIS Hardening with Ansible</b>	373
<b>Technical requirements</b>	373
<b>Writing Ansible security policies</b>	374

Ensuring remote root login is disabled	375
Building up security policies in Ansible	378
Implementing more complex security benchmarks in Ansible	385
Making appropriate decisions in your playbook design	388
<b>Application of enterprise-wide policies with Ansible</b>	390
<b>Testing security policies with Ansible</b>	394
<b>Summary</b>	397
<b>Questions</b>	397
<b>Further reading</b>	398
<b>Chapter 15: Auditing Security Policy with OpenSCAP</b>	399
<b>Technical requirements</b>	400
<b>Installing your OpenSCAP server</b>	400
Running OpenSCAP Base	401
Installing the OpenSCAP Daemon	402
Running SCAP Workbench	403
Considering other OpenSCAP tools	404
<b>Evaluating and selecting policies</b>	405
Installing SCAP Security Guide	406
Understanding the purpose of XCCDF and OVAL policies	408
Installing other OpenSCAP policies	410
<b>Scanning the enterprise with OpenSCAP</b>	412
Scanning the Linux infrastructure with OSCAP	412
Running regular scans with the OpenSCAP Daemon	422
Scanning with SCAP Workbench	426
<b>Interpreting results</b>	428
<b>Summary</b>	432
<b>Questions</b>	432
<b>Further reading</b>	433
<b>Chapter 16: Tips and Tricks</b>	434
<b>Technical requirements</b>	434
<b>Version control for your scripts</b>	435
Integrating Ansible with Git	436
Organizing your version control repositories effectively	438
Version control of roles in Ansible	440
<b>Inventories – maintaining a single source of truth</b>	444
Working with Ansible dynamic inventories	445
Example – working with the Cobbler dynamic inventory	448
<b>Running one-off tasks with Ansible</b>	452
<b>Summary</b>	457
<b>Questions</b>	457
<b>Further reading</b>	458
<b>Assessments</b>	459

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<b>Other Books You May Enjoy</b>	472
<b>Index</b>	475



# Preface

Welcome to *Hands-On Enterprise Automation on Linux*, your guide to a collection of the most valuable processes, methodologies, and tools for streamlining and efficiently managing your Linux deployments at enterprise scale. This book will provide you with the knowledge and skills required to standardize your Linux estate and manage it at scale, using open source tools including Ansible, AWX (Ansible Tower), Pulp, Katello, and OpenSCAP. You will learn about the creation of standard operating environments, and how to define, document, manage, and maintain these standards using Ansible. In addition, you will acquire knowledge of security hardening standards, such as the CIS Benchmarks. Throughout the book, practical, hands-on examples will be provided for you to try for yourself, on which you can build your own code, and to demonstrate the principles being covered.

## Who this book is for

This book is for anyone who has a Linux environment to design, implement, and care for. It is intended to appeal to a wide range of open source professionals, from infrastructure architects through to system administrators, including professionals up to C level. Proficiency in the implementation and maintenance of Linux servers and familiarity with the concepts involved in building, patching, and maintaining a Linux server infrastructure are assumed. Prior knowledge of Ansible and other automation tools is not essential but may be beneficial.

## What this book covers

Chapter 1, *Building a Standard Operating Environment on Linux*, provides a detailed introduction to standardized operating environments, a core concept that will be referred to throughout this hands-on book, and which is essential understanding in order for you to embark on this journey.

Chapter 2, *Automating Your IT Infrastructure with Ansible*, provides a detailed, hands-on breakdown of an Ansible playbook, including inventories, roles, variables, and best practices for developing and maintaining playbooks; a crash course enabling you to learn just enough Ansible to begin your automation journey.

Chapter 3, *Streamlining Infrastructure Management with AWX*, explores, with the help of practical examples, the installation and utilization of AWX (also available as Ansible Tower) so as to build good business processes around your Ansible automation infrastructure.

Chapter 4, *Deployment Methodologies*, enables you to understand the various methods available in relation to large-scale deployments in Linux environments, and how to leverage these to the best advantage of the enterprise.

Chapter 5, *Using Ansible to Build Virtual Machine Templates for Deployment*, explores the best practices for deploying Linux by building virtual machine templates that will be deployed at scale on a hypervisor in a practical and hands-on manner.

Chapter 6, *Custom Builds with PXE Booting*, looks at the process of PXE booting for when the templated approach to server builds may not be possible (for example, where bare-metal servers are still being used), and how to script this to build standard server images over the network.

Chapter 7, *Configuration Management with Ansible*, provides practical examples of how to manage your build once it enters service, so as to ensure that consistency remains a byword without limiting innovation.

Chapter 8, *Enterprise Repository Management with Pulp*, looks at how to perform patching in a controlled manner to prevent inconsistencies re-entering even the most carefully standardized environment through the use of the Pulp tool.

Chapter 9, *Patching with Katello*, builds on our work involving the Pulp tool by introducing you to Katello, providing even more control over your repositories whilst providing a user-friendly graphical user interface.

Chapter 10, *Managing Users on Linux*, provides a detailed look at user account management using Ansible as the orchestration tool, along with the use of centralized authentication systems such as LDAP directories.

Chapter 11, *Database Management*, looks at how Ansible can be used both to automate deployments of databases, and to execute routine database management tasks, on Linux servers.

Chapter 12, *Performing Routine Maintenance with Ansible*, explores some of the more advanced on-going maintenance that Ansible can perform on a Linux server estate.

Chapter 13, *Using CIS Benchmarks*, provides an in-depth examination of the CIS server hardening benchmarks and how to apply them on Linux servers.

Chapter 14, *CIS Hardening with Ansible*, looks at how a security hardening policy can be rolled out across an entire estate of Linux servers in an efficient, reproducible manner with Ansible.

Chapter 15, *Auditing Security Policy with OpenSCAP*, provides a hands-on look at the installation and use of OpenSCAP to audit Linux servers for policy violations on an on-going basis, since security standards can be reversed by either malicious or otherwise well-meaning end users.

Chapter 16, *Tips and Tricks*, explores a number of tips and tricks to keep your Linux automation processes running smoothly in the face of the ever-changing demands of the enterprise.

## To get the most out of this book

To follow the examples in this book, it is recommended that you have access to at least two Linux machines for testing on, though more may be preferable to develop the examples more fully. These can be either physical or virtual machines—all examples were developed on a set of Linux virtual machines, but should work just as well on physical ones. In Chapter 5, *Using Ansible to Build Virtual Machine Templates for Deployment*, we make use of nested virtualization on a KVM virtual machine to build a Linux image. The exact hardware requirements for this are listed at the beginning of this chapter. This will require either access to a physical machine with the appropriate CPU to run the examples on, or a hypervisor that supports nested virtualization (for example, VMware or Linux KVM).

Please be aware that some examples in this book could be disruptive to other services on your network; where there is such a risk, this is highlighted at the beginning of each chapter. I recommend you try out the examples in an isolated test network unless/until you are confident that they will not have any impact on your operations.

Although other Linux distributions are mentioned in the book, we focus on two key Linux distributions—CentOS 7.6 (though if you have access to it, you are welcome to use Red Hat Enterprise Linux 7.6, which should work just as well in most examples), and Ubuntu Server 18.04. All test machines were built from the official ISO images, using the minimal installation profile.

As such, where additional software is required, we take you through the steps needed to install it so that you can complete the examples. If you choose to complete all the examples, you will install software such as AWX, Pulp, Katello, and OpenSCAP. The only exception to this is FreeIPA, which is mentioned in Chapter 10, *Managing Users on Linux*. Installing a directory server for your enterprise is a huge topic that sadly requires more space than we have in this book—hence, you may wish to explore this topic independently.

The text assumes that you will run Ansible from one of your Linux test machines, but Ansible can actually be run on any machine with Python 2.7 or Python 3 (versions 3.5 and higher) installed (Windows is supported for the control machine, but only through a Linux distribution running in the **Windows Subsystem for Linux (WSL)** layer available on newer versions of Windows. Supported operating systems for Ansible include (but are not limited to) Red Hat, Debian, Ubuntu, CentOS, macOS, and FreeBSD.

This book uses the Ansible 2.8.x.x series release, although a few examples are specific to Ansible 2.9.x.x, which was released during the course of writing. Ansible installation instructions can be found at [https://docs.ansible.com/ansible/intro\\_installation.html](https://docs.ansible.com/ansible/intro_installation.html).

## Download the example code files

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