Guided Lab: How to install CloudFormation helper scripts on Ubuntu

Description

CloudFormation helper scripts are essential tools provided by AWS to simplify and automate the setup and management of resources defined in CloudFormation templates. Unlike AWS-provided Linux AMIs, which come with pre-installed tools, an Ubuntu instance requires manual installation of these scripts. This guide will walk you through the process of installing CloudFormation helper scripts on Supported Ubuntu Versions.

- **Ubuntu 16.04 LTS**
- **Ubuntu 18.04 LTS**
- **Ubuntu 20.04 LTS**
- **Ubuntu 22.04 LTS**

Prerequisites

This lab assumes you have experience creating an Amazon EC2 Instance and has knowledge of basic fundamentals of the command line.

If you find any gaps in your knowledge, consider taking the following labs:

- **Creating an Amazon EC2 instance (Linux)**
- **Setting up a Web server on an EC2 instance**

Objectives

By the end of this guide, you will have successfully installed the AWS CloudFormation helper scripts on your Ubuntu instance, allowing you to leverage these tools for managing your CloudFormation stacks.

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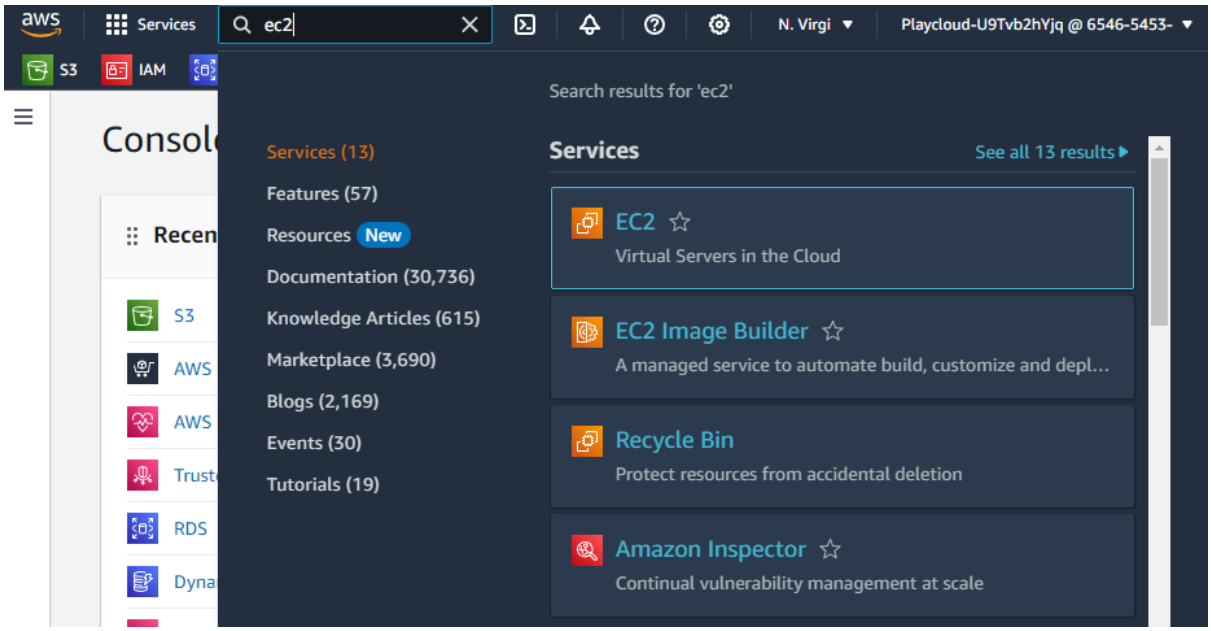
Lab Steps

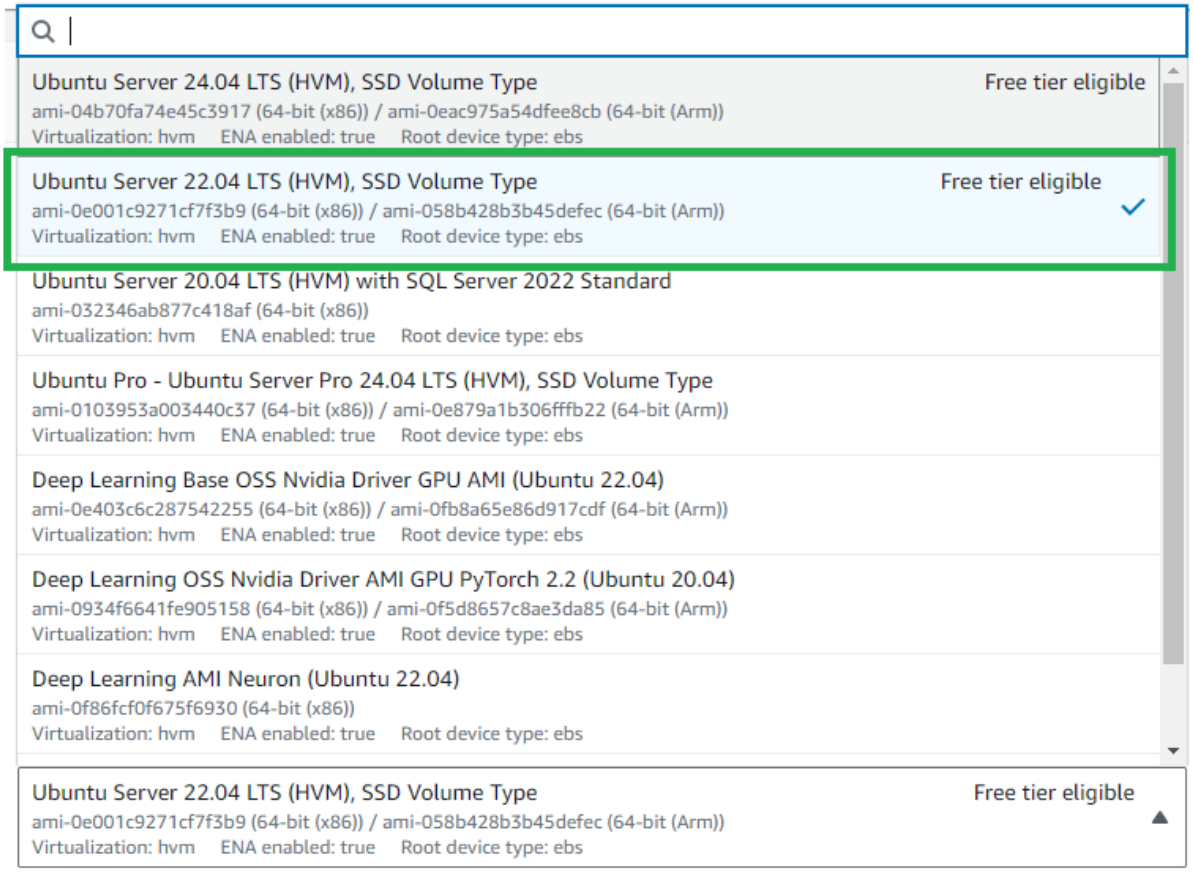
Launching your EC2 Instance

1. Search '*ec2*' in the AWS Management Console search bar. Click EC2 on the search results.



2. Launch EC2 instance with the following configurations.

- **Name: td-installing-cloudformation-helper**
- **AMI: Ubuntu Server 22.04 LTS**



- **Instance type: t2.micro**

- **Key pair:**
    - **Click on Create new key pair and name it myKeyPair**
      Take note where you downloaded your keypair
- **Network settings:**
    - **Allow SSH traffic from: (In production environment, normally, you choose My IP for best practice. However, for simplicity of this lab lets choose Anywhere)**
    - **Auto-assign public IP: Enable**

3. Click on Launch instance

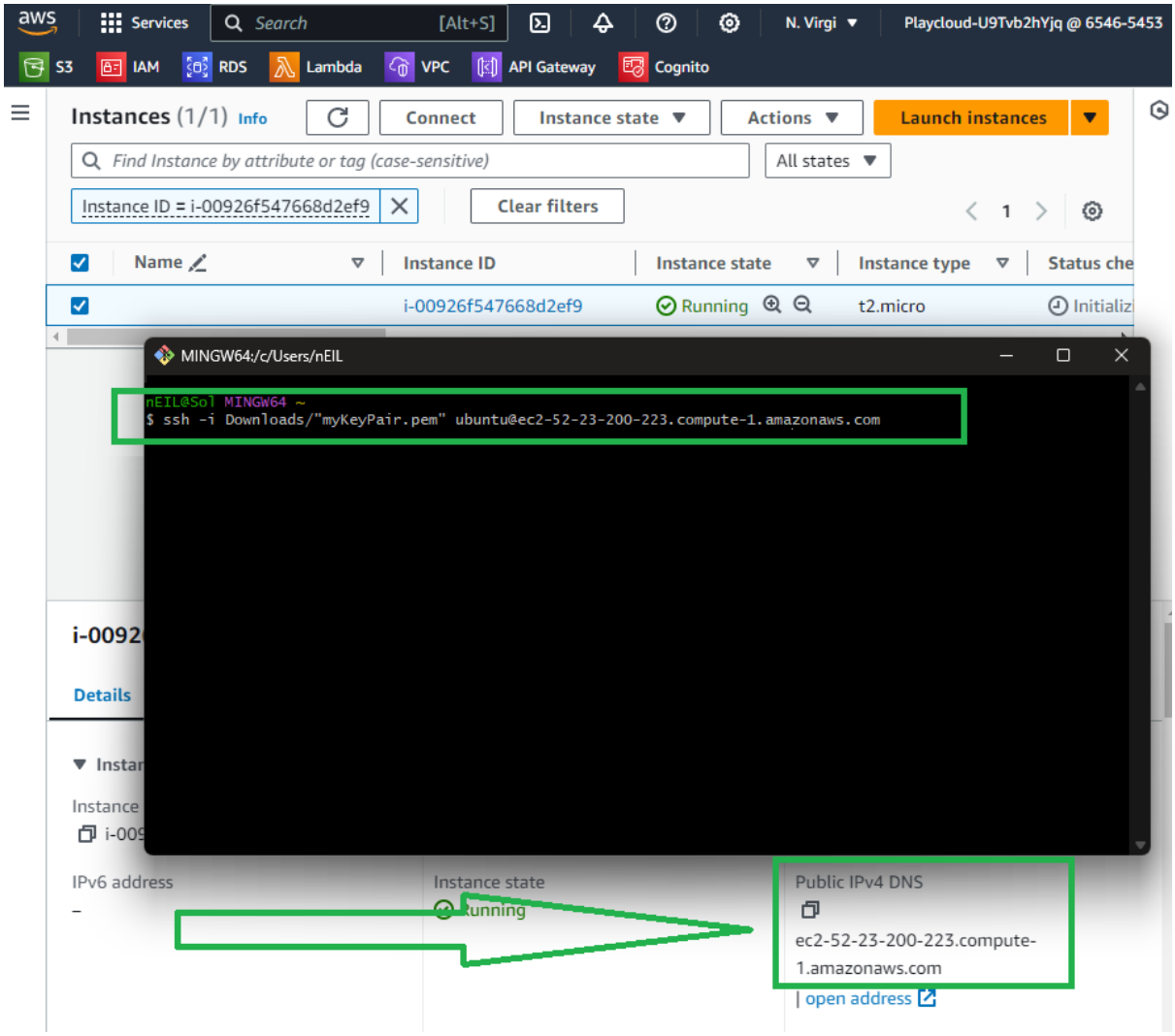
Installing the CloudFormation Helper Scripts

1. **Connect to Your EC2 Instance via SSH**

- Open your terminal/Git bash and connect to your EC2 instance using SSH:

ssh -i <directory_of_your_keypair>/"myKeyPair.pem"
ubuntu@<your_ec2_instance_Public_IPv4_DNS>

Do not forget to change the
placheolders <directory_of_your_keypair> *and* <your_ec2_instance_Public_IPv4_DNS>

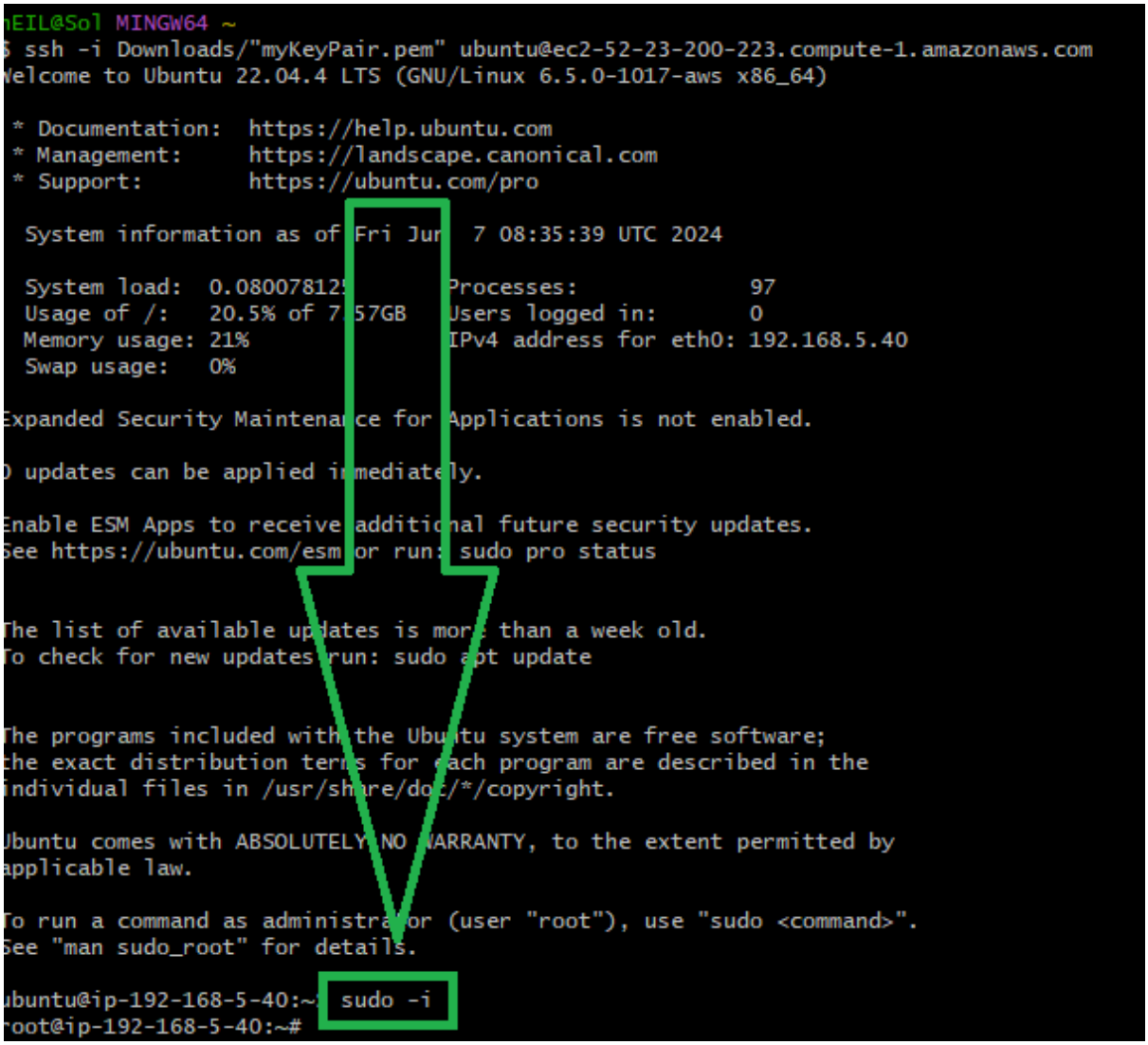


- You will receive a command response, saying:
  "Are you sure you want to continue connecting (yes/no/[fingerprint])? "
-
    - Type "**yes**"

2. **Switch to Root User**

- Elevate your privileges by switching to the root user:

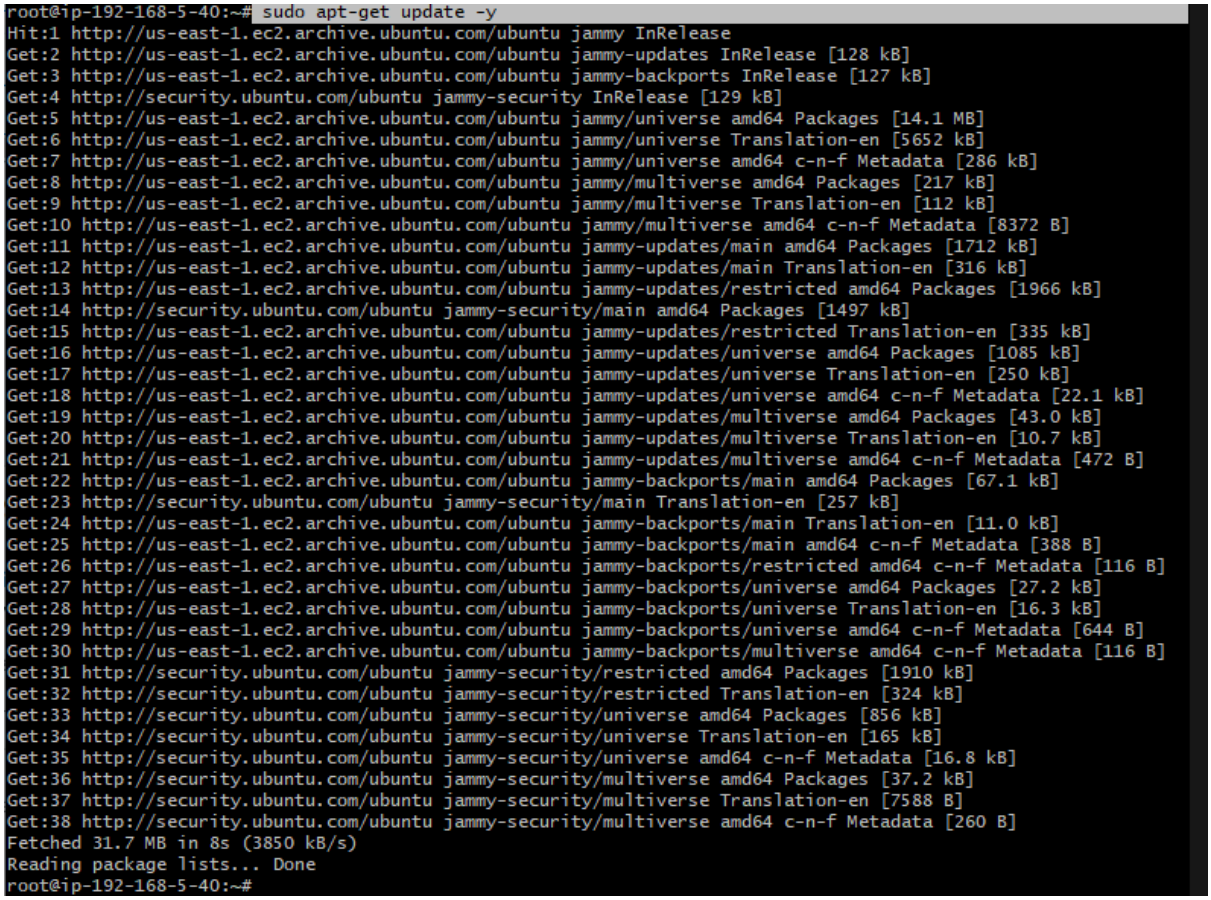
sudo -i



3. **Update Package Repository:**

- Ensure that the package repository is up to date by running:

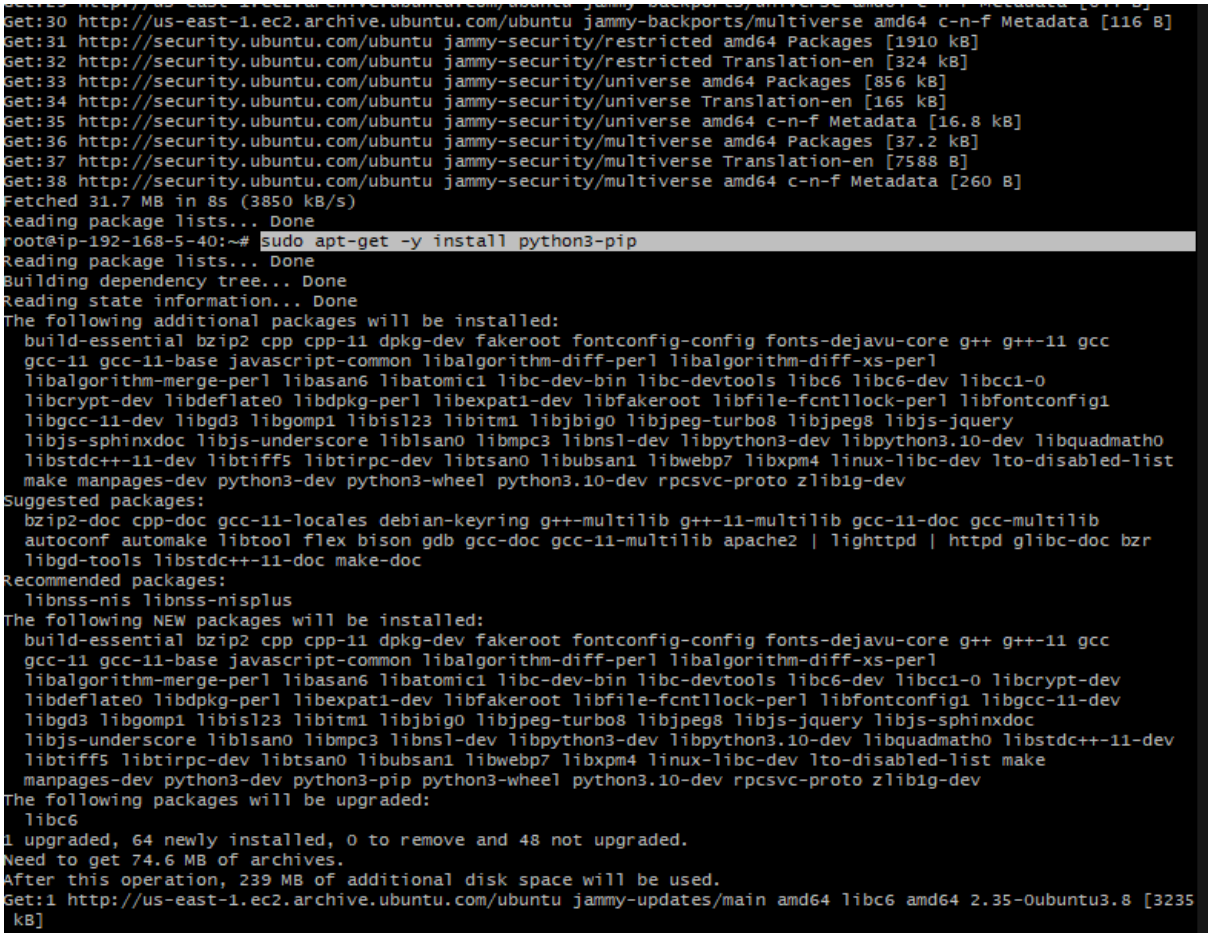
sudo apt-get update -y



4. . **Install Python3 and pip:**

- CloudFormation helper scripts require Python3 and pip. Install them using the following command:

sudo apt-get -y install python3-pip

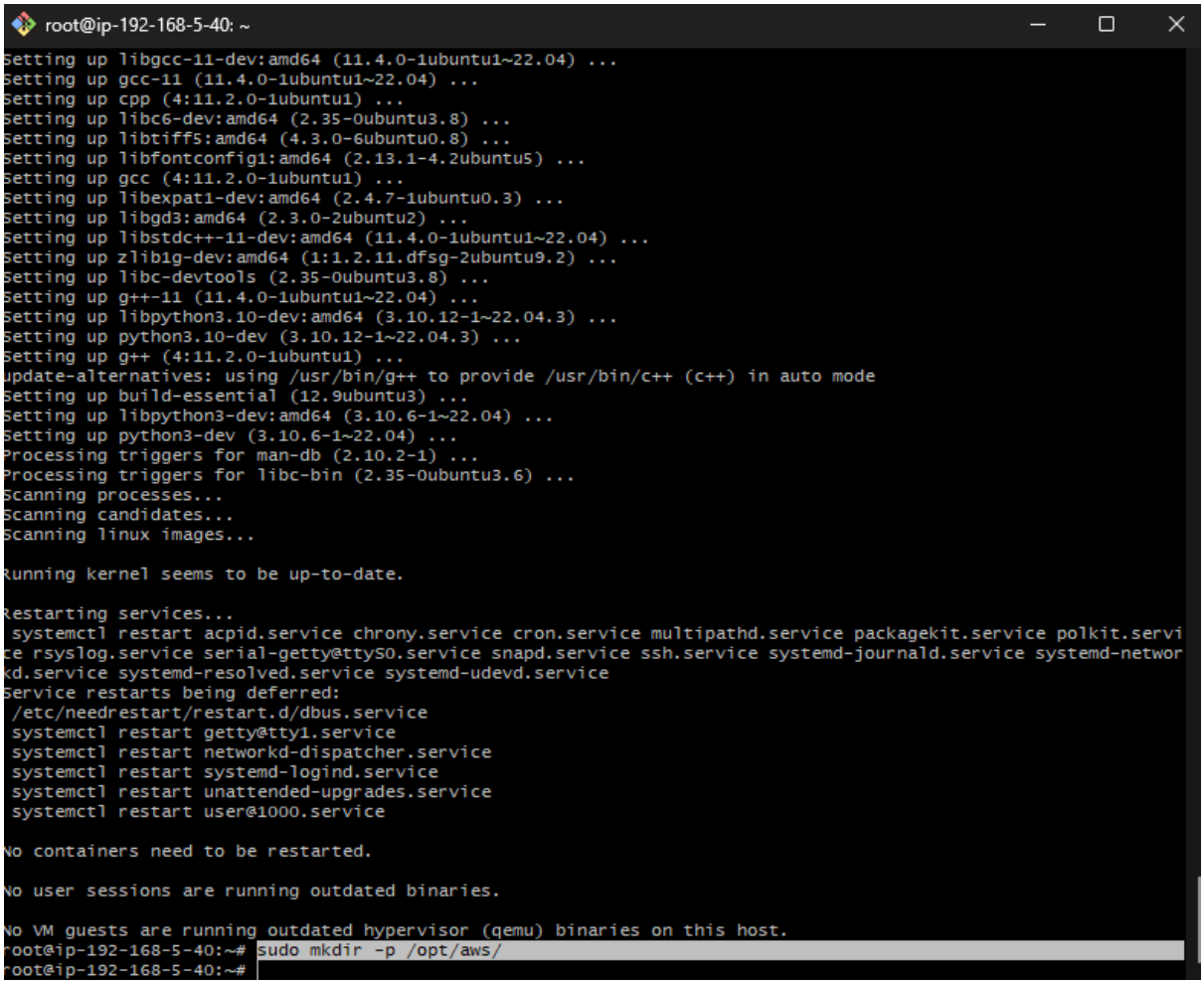


- If you receive a command response, just press **ENTER.**

5. **Create Directory for CloudFormation Helper Scripts:**

- Create a directory to store the CloudFormation helper scripts.

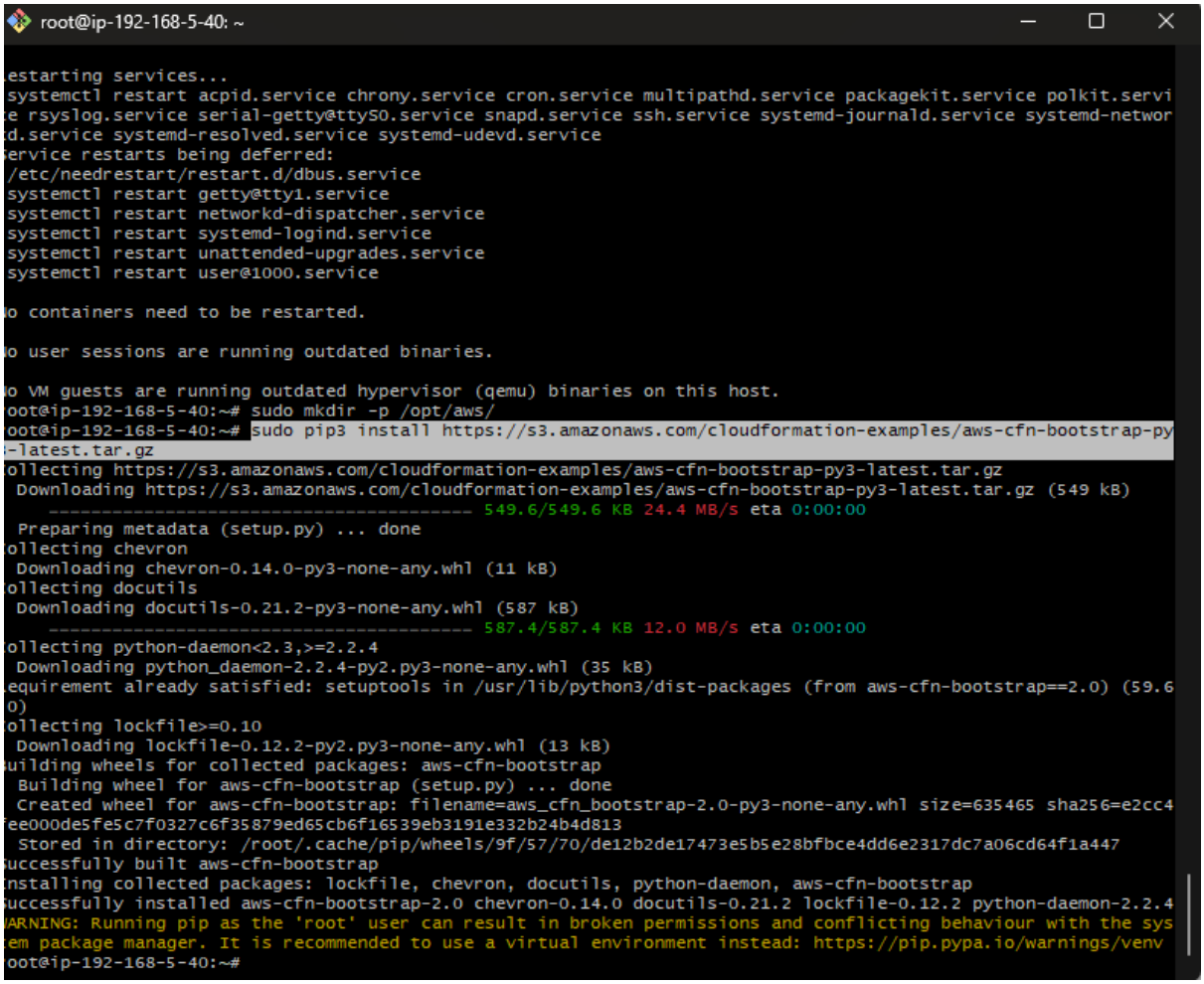
sudo mkdir -p /opt/aws/



6. **Install CloudFormation Helper Scripts:**

- Use pip to install the CloudFormation helper scripts.

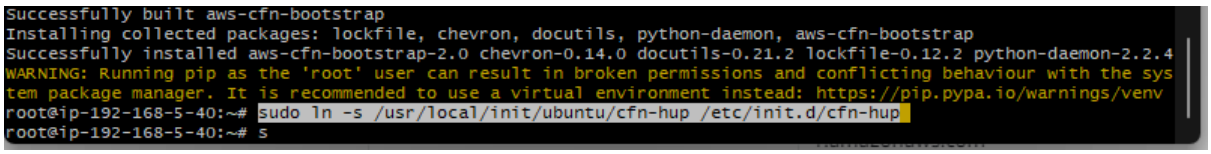
sudo pip3 install https://s3.amazonaws.com/cloudformation-examples/aws-cfn-bootstrap-py3-latest.tar.gz



7**. Create Symbolic Link:**

- Create a symbolic link for the CloudFormation helper scripts to ensure they are accessible.

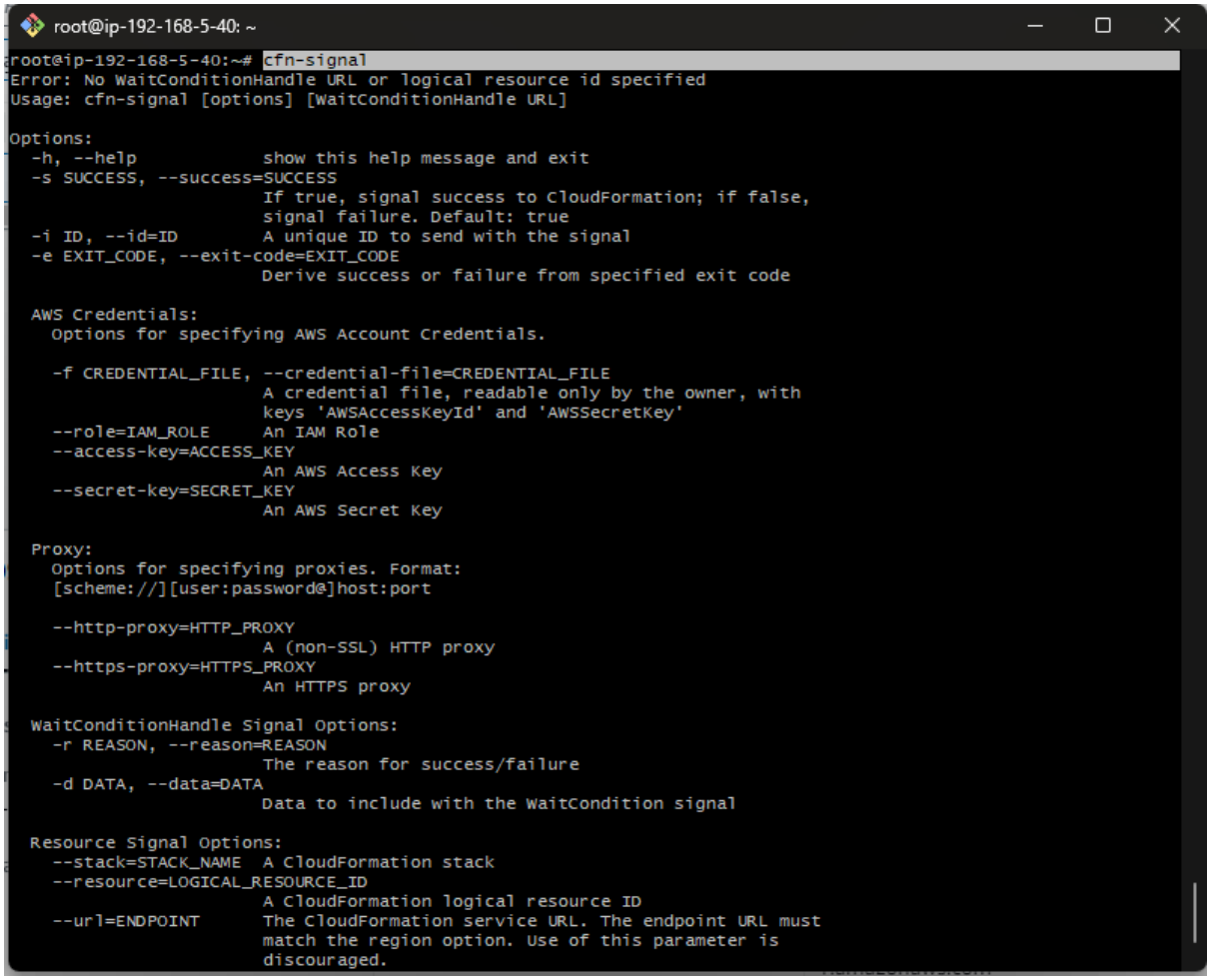
sudo ln -s /usr/local/init/ubuntu/cfn-hup /etc/init.d/cfn-hup



8. **Verification:**

- To verify that the installation was successful, try running the following commands:

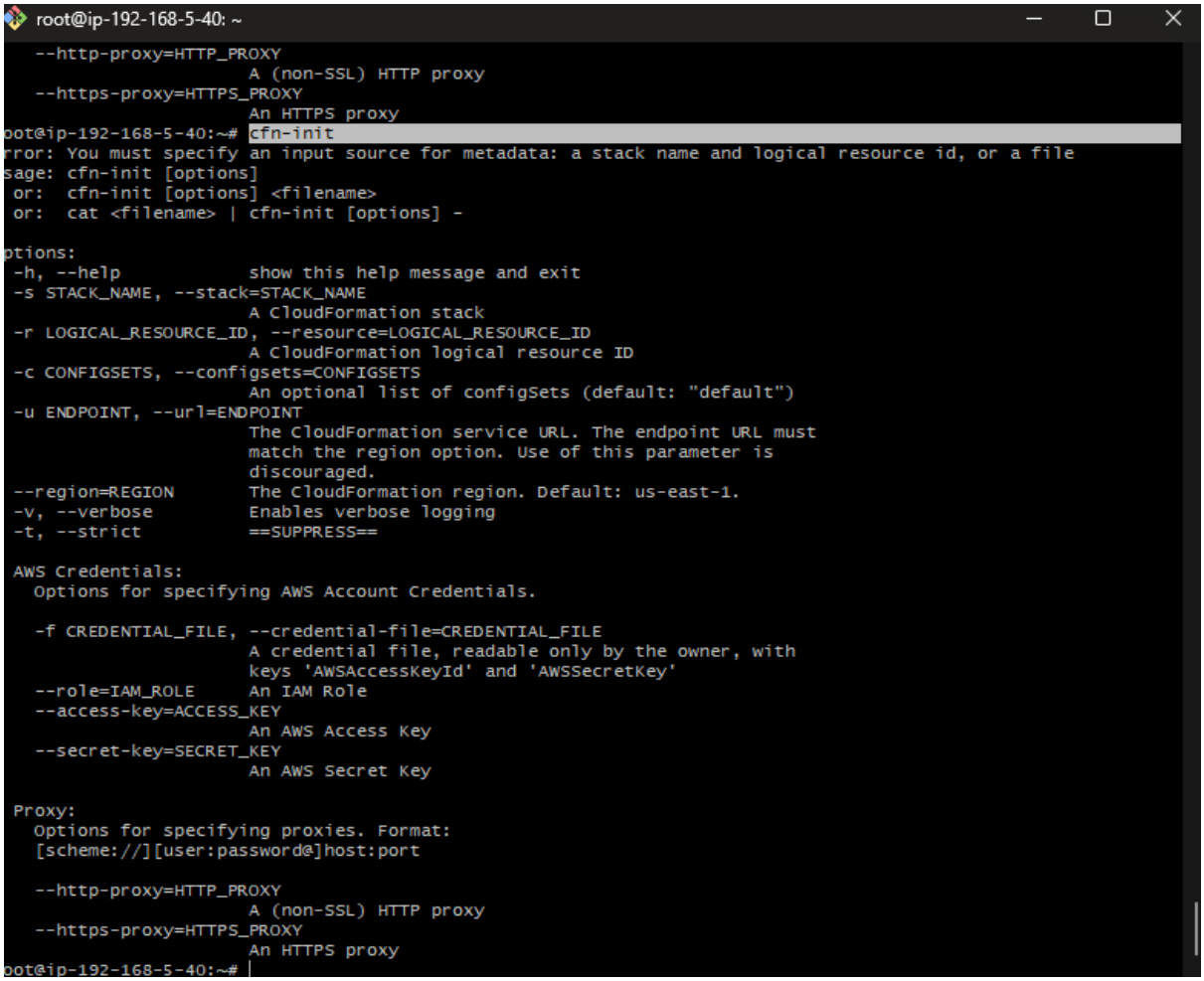
cfn-signal



cfn-get-metadata

```
                        discouraged.
    --region=REGION     The CloudFormation region. Default: us-east-1.
root@ip-192-168-5-40:~# cfn-get-metadata
Error: You must specify both a stack name and logical resource id
Usage: cfn-get-metadata [options]

Options:
  -h, --help            show this help message and exit
  -s STACK_NAME, --stack=STACK_NAME
                        A CloudFormation stack
  -r LOGICAL_RESOURCE_ID, --resource=LOGICAL_RESOURCE_ID
                        A CloudFormation logical resource ID
  -k KEY, --key=KEY     Retrieve the value at <key> in the Metadata object;
                        must be in dotted object notation (parent.child.leaf)
  -u ENDPOINT, --url=ENDPOINT
                        The CloudFormation service URL. The endpoint URL must
                        match the region option. Use of this parameter is
                        discouraged.
  --region=REGION       The CloudFormation region. Default: us-east-1.
  -v, --verbose         Enables verbose logging

  AWS Credentials:
    Options for specifying AWS Account Credentials.

    -f CREDENTIAL_FILE, --credential-file=CREDENTIAL_FILE
                        A credential file, readable only by the owner, with
                        keys 'AWSAccessKeyId' and 'AWSSecretKey'
    --role=IAM_ROLE     An IAM Role
    --access-key=ACCESS_KEY
                        An AWS Access Key
    --secret-key=SECRET_KEY
                        An AWS Secret Key

  Proxy:
    Options for specifying proxies. Format:
    [scheme://][user:password@]host:port

    --http-proxy=HTTP_PROXY
                        A (non-SSL) HTTP proxy
    --https-proxy=HTTPS_PROXY
                        An HTTPS proxy
```

cfn-init



That's it. Now you can fully leverage the capabilities of your Ubuntu instance installed with CloudFormation helper scripts within your CloudFormation templates. One common use case is creating an Amazon Machine Image (AMI) out of this instance, which you can then utilize in your EC2 resource declarations. This ensures consistency and repeatability in your deployments.

Alternatively, you can integrate the manual steps we've performed here into your EC2 resource using User Data. By embedding these commands directly into your EC2 instance's User Data section, you can automate the setup process entirely within your CloudFormation template. This approach streamlines deployment and reduces manual intervention, enhancing the efficiency of your infrastructure management.

Whether you choose to create an AMI or utilize User Data, the installation of CloudFormation helper scripts empowers you to automate tasks, configure resources dynamically, and maintain a standardized deployment process across your AWS environment.

One last thing! It is a good practice to clean up the resources created during this lab. Not only will it make you a better professional, but you will also become a more organized person. Happy learning!