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# VolSync

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## INSTALLATION

### 1.1 Development

If you are developing VolSync, there are a few options to get up-and-running. All of these options will assume the use of a local `kind` cluster.

Once you have `kind` installed, there is a convenient script in the `hack/` directory that will get a cluster running and properly configured.

```
$ ./hack/setup-kind-cluster.sh
```

Once you have a cluster running, you can either build and deploy the operator in the cluster, or you can run the operator locally against the cluster.

Build & deploy

Run locally

The below command will build all containers (operator and movers) from the local source, inject them into the running `kind` cluster, then use the local helm templates to start the operator.

```
# Build, inject, and run
$ ./hack/run-in-kind.sh
```

The below commands will run the operator binary locally, but the mover containers will be pulled from Quay (`latest` tag). This option is good when developing the operator code since it permits fast rebuilds and easy access to the operator logs.

```
# Install VolSync CRDs into the cluster
$ make install

# Run the operator locally
$ make run
```

If you will be working with the Rclone or Restic movers, you may want to deploy Minio in the `kind` cluster to act as an object repository. It can be started via:

```
$ ./hack/run-minio.sh
```

## 1.2 RBAC permissions

Once the VolSync operator has been installed, it is ready for use in the cluster, but only those with cluster administrator privileges have permission to use it.

In order for the operator to be used, it is necessary to have the ability to access VolSync's ReplicationSource and ReplicationDestination custom resource objects. It is recommended that users be allowed to manage data replication within the namespaces that they are assigned. This enables "self-service" data protection for the cluster's users.

The below RBAC rules give users access to VolSync's CRs within the namespaces that they manage. It also grants access to VolumeSnapshot objects so that users can easily "promote" the latest destination snapshot, if necessary, during recovery/fail-over.

Listing 1: volsync-rbac.yaml

```

---
apiVersion: rbac.authorization.k8s.io/v1
kind: ClusterRole
metadata:
  name: volsync-edit
  labels:
    # Grant access to namespace admins
    rbac.authorization.k8s.io/aggregate-to-admin: "true"
    # Grant access to namespace editors
    rbac.authorization.k8s.io/aggregate-to-edit: "true"
rules:
  # Give users full control of ReplicationSource and ReplicationDestination
  # objects so they can manage data replication
  - apiGroups:
    - volsync.backube
    resources:
    - replicationdestinations
    - replicationsources
    verbs:
    - create
    - delete
    - deletecollection
    - get
    - list
    - patch
    - update
    - watch
  - apiGroups:
    - volsync.backube
    resources:
    - replicationdestinations/status
    - replicationsources/status
    verbs:
    - get
    - list
    - watch
  # Give users the ability to view VolumeSnapshots so they can "promote" the
  # destination snapshots into usable PVCs
  - apiGroups:

```

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```

- snapshot.storage.k8s.io
resources:
- volumesnapshots
- volumesnapshots/status
verbs:
- get
- list
- watch

---
apiVersion: rbac.authorization.k8s.io/v1
kind: ClusterRole
metadata:
  name: volsync-view
  labels:
    # Grant access to namespace viewers
    rbac.authorization.k8s.io/aggregate-to-view: "true"
rules:
  # Give users read access to ReplicationSource and ReplicationDestination
  # objects so they can monitor data replication
  - apiGroups:
    - volsync.backube
    resources:
    - replicationdestinations
    - replicationsources
    - replicationdestinations/status
    - replicationsources/status
    verbs:
    - get
    - list
    - watch
  # Give users the ability to monitor (destination) VolumeSnapshots
  - apiGroups:
    - snapshot.storage.k8s.io
    resources:
    - volumesnapshots
    - volumesnapshots/status
    verbs:
    - get
    - list
    - watch

```

The following directions will walk through the process of deploying VolSync.

---

**Note:** Volume snapshot and clone capabilities are required for some VolSync functionality. It is recommended that you use a CSI driver and StorageClass capable of snapshotting and cloning volumes.

---

There are several methods for installing VolSync. Choose the option that relates to your situation.

**Warning:** VolSync requires the Kubernetes snapshot controller to be installed within a cluster. If the controller is not deployed review the snapshot controller documentation <https://github.com/kubernetes-csi/external-snapshotter>.

### 1.3 Kubernetes & OpenShift

The recommended method for deploying VolSync is via its [Helm chart](#).

```
# Add the Backube Helm repo
$ helm repo add backube https://backube.github.io/helm-charts/

# Deploy the chart in your cluster
$ helm install --create-namespace -n volsync-system volsync backube/volsync
```

Verify VolSync is running by checking the output of `kubectl get deploy`:

```
$ kubectl -n volsync-system get deploy/volsync
NAME      READY   UP-TO-DATE   AVAILABLE   AGE
volsync   1/1     1             1           60s
```

#### 1.3.1 Configuring CSI storage

To make the most of VolSync's capabilities, it's important that the volumes being replicated are using CSI-based storage drivers and that volume snapshotting is properly configured.

The currently configured StorageClasses can be viewed via:

```
$ kubectl get storageclasses
```

And the VolumeSnapshotClasses can be viewed via:

```
$ kubectl get volumesnapshotclasses
```

StorageClasses that carry the `storageclass.kubernetes.io/is-default-class: "true"` and VolumeSnapshotClasses that carry the `snapshot.storage.kubernetes.io/is-default-class: "true"` annotations are marked as the defaults on the cluster, meaning that if the class is not specified, these defaults will be used. However, it is not necessary to set or modify the default on your cluster since the classes can be specified directly in the ReplicationSource and ReplicationDestination objects used by VolSync.

Below are examples of configured CSI storage on a few different platforms. Your configuration may be different.

AWS

Azure

GCP

Longhorn

vSphere

The EBS CSI driver on AWS-based clusters is usually named `gp2-csi` or `gp3-csi`.

```

# List StorageClasses
$ kubectl get storageclasses
NAME                                PROVISIONER                RECLAIMPOLICY   VOLUMEBINDINGMODE   AGE
↪ ALLOWVOLUMEEXPANSION             AGE
gp2 (default)                       kubernetes.io/aws-ebs      Delete           WaitForFirstConsumer true   25m
↪
gp2-csi                              ebs.csi.aws.com           Delete           WaitForFirstConsumer true   25m
↪
gp3-csi                              ebs.csi.aws.com           Delete           WaitForFirstConsumer true   25m
↪

# View details of the gp2-csi SC
$ kubectl get storageclass/gp2-csi -oyaml
allowVolumeExpansion: true
apiVersion: storage.k8s.io/v1
kind: StorageClass
metadata:
  creationTimestamp: "2022-02-08T14:03:20Z"
  name: gp2-csi
  resourceVersion: "5288"
  uid: 24d2cee6-1346-4c3e-8742-39dec08e3e50
parameters:
  encrypted: "true"
  type: gp2
provisioner: ebs.csi.aws.com
reclaimPolicy: Delete
volumeBindingMode: WaitForFirstConsumer

```

The CSI driver on Azure-based clusters is usually named `managed-csi`.

```

# List StorageClasses
$ kubectl get storageclasses
NAME                                PROVISIONER                RECLAIMPOLICY   VOLUMEBINDINGMODE   AGE
↪ ALLOWVOLUMEEXPANSION             AGE
managed-csi                          disk.csi.azure.com         Delete           WaitForFirstConsumer true   45m
↪ WaitForFirstConsumer             true
managed-premium (default)            kubernetes.io/azure-disk   Delete           WaitForFirstConsumer true   46m
↪ WaitForFirstConsumer             true

# View details of the managed-csi SC
$ kubectl get storageclass/managed-csi -oyaml
allowVolumeExpansion: true
apiVersion: storage.k8s.io/v1
kind: StorageClass
metadata:
  creationTimestamp: "2022-02-08T14:57:23Z"
  name: managed-csi
  resourceVersion: "5853"
  uid: 3aeba0d1-6c52-481c-9dc1-786ae84a2f7b
parameters:
  skuname: Premium_LRS
provisioner: disk.csi.azure.com

```

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```
reclaimPolicy: Delete
volumeBindingMode: WaitForFirstConsumer
```

The CSI driver on GCP-based clusters is usually named `standard-csi`.

```
# List StorageClasses
$ kubectl get storageclasses
NAME                                PROVISIONER          RECLAIMPOLICY  VOLUMEBINDINGMODE  ↵
↪ ALLOWVOLUMEEXPANSION  AGE
standard (default)  kubernetes.io/gce-pd  Delete         WaitForFirstConsumer  true↵
↪                               15m
standard-csi       pd.csi.storage.gke.io  Delete         WaitForFirstConsumer  true↵
↪                               15m

# View details of the standard-csi SC
$ kubectl get storageclass/standard-csi -oyaml
allowVolumeExpansion: true
apiVersion: storage.k8s.io/v1
kind: StorageClass
metadata:
  creationTimestamp: "2022-02-08T13:24:53Z"
  name: standard-csi
  resourceVersion: "5976"
  uid: 066a43fc-798f-49a7-b62a-0350e8946364
parameters:
  replication-type: none
  type: pd-standard
provisioner: pd.csi.storage.gke.io
reclaimPolicy: Delete
volumeBindingMode: WaitForFirstConsumer
```

The CSI driver on Longhorn-based clusters are configured based on the underlying storage type. Here, we will assume a default StorageClass named `longhorn`.

```
# List StorageClasses
$ kubectl get storageclasses
NAME                                PROVISIONER          RECLAIMPOLICY  VOLUMEBINDINGMODE  ↵
↪ ALLOWVOLUMEEXPANSION  AGE
longhorn (default)  driver.longhorn.io   Delete         Immediate           true↵
↪                               15m

# View details of the longhorn SC
$ kubectl get storageclass/longhorn -oyaml
kind: StorageClass
apiVersion: storage.k8s.io/v1
metadata:
  name: longhorn
provisioner: driver.longhorn.io
allowVolumeExpansion: true
reclaimPolicy: Delete
```

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```

volumeBindingMode: Immediate
parameters:
  # Your parameters here...

```

The CSI driver on vSphere-based clusters is usually named `thin-csi`.

```

# List StorageClasses
$ kubectl get storageclasses
NAME                PROVISIONER          RECLAIMPOLICY   VOLUMEBINDINGMODE
↪ALLOWVOLUMEEXPANSION  AGE
thin (default)     kubernetes.io/vsphere-volume  Delete          Immediate
↪false                20m
thin-csi           csi.vsphere.vmware.com  Delete          WaitForFirstConsumer
↪true                18m

# View details of the thin-csi SC
$ kubectl get storageclass/thin-csi -oyaml
allowVolumeExpansion: true
apiVersion: storage.k8s.io/v1
kind: StorageClass
metadata:
  creationTimestamp: "2022-02-08T16:48:52Z"
  name: thin-csi
  resourceVersion: "9789"
  uid: 80d45374-8447-47eb-950c-2568af070d6e
parameters:
  StoragePolicyName: openshift-storage-policy-ci-ln-54d2r5t-c1627-jvkws
provisioner: csi.vsphere.vmware.com
reclaimPolicy: Delete
volumeBindingMode: WaitForFirstConsumer

```

You should also verify the presence of a corresponding `VolumeSnapshotClass`. Note that the name of the SC and VSC do not need to be the same, but the provisioner/driver should be.

AWS

Azure

GCP

Longhorn

vSphere

```

# List VolumeSnapshotClasses
$ kubectl get volumesnapshotclasses
NAME                DRIVER          DELETIONPOLICY  AGE
csi-aws-vsc         ebs.csi.aws.com  Delete          23m

# View details of the csi-aws-vsc VSC
$ kubectl get volumesnapshotclass/csi-aws-vsc -oyaml
apiVersion: snapshot.storage.k8s.io/v1
deletionPolicy: Delete
driver: ebs.csi.aws.com

```

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```

kind: VolumeSnapshotClass
metadata:
  annotations:
    snapshot.storage.kubernetes.io/is-default-class: "true"
  creationTimestamp: "2022-02-08T14:03:20Z"
  generation: 1
  name: csi-aws-vsc
  resourceVersion: "5301"
  uid: d990af7b-d2ae-4a49-8cfe-fd5ae93902df

```

---

**Important:** The AWS EBS CSI driver does not support volume cloning. When configuring replication with VolSync, be sure to choose a copyMethod of Snapshot for the source volume. Choosing Clone will not work.

---

```

# List VolumeSnapshotClasses
$ kubectl get volumesnapshotclasses
NAME                DRIVER                DELETIONPOLICY  AGE
csi-azuredisk-vsc  disk.csi.azure.com   Delete           48m

# View details of the csi-azuredisk-vsc VSC
$ kubectl get volumesnapshotclass/csi-azuredisk-vsc -oyaml
apiVersion: snapshot.storage.k8s.io/v1
deletionPolicy: Delete
driver: disk.csi.azure.com
kind: VolumeSnapshotClass
metadata:
  annotations:
    snapshot.storage.kubernetes.io/is-default-class: "true"
  creationTimestamp: "2022-02-08T14:57:23Z"
  generation: 1
  name: csi-azuredisk-vsc
  resourceVersion: "5847"
  uid: 1d105f8c-4e49-48e1-8ead-927f90f4bb2e
parameters:
  incremental: "true"

```

```

# List VolumeSnapshotClasses
$ kubectl get volumesnapshotclasses
NAME                DRIVER                DELETIONPOLICY  AGE
csi-gce-pd-vsc     pd.csi.storage.gke.io  Delete           17m

# View details of the csi-gce-pd-vsc VSC
$ kubectl get volumesnapshotclass/csi-gce-pd-vsc -oyaml
apiVersion: snapshot.storage.k8s.io/v1
deletionPolicy: Delete
driver: pd.csi.storage.gke.io
kind: VolumeSnapshotClass
metadata:
  annotations:
    snapshot.storage.kubernetes.io/is-default-class: "true"

```

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```

creationTimestamp: "2022-02-08T13:24:53Z"
generation: 1
name: csi-gce-pd-vsc
resourceVersion: "5981"
uid: 886de96d-820c-403b-8570-fcfb37939532

```

```

# List VolumeSnapshotClasses
$ kubectl get volumesnapshotclasses
NAME                                DRIVER                                DELETIONPOLICY  AGE
longhorn-snapshot-vsc              driver.longhorn.io                    Delete           10m

# View details of the longhorn-snapshot-vsc VSC
$ kubectl get volumesnapshotclass/longhorn-snapshot-vsc -oyaml
kind: VolumeSnapshotClass
apiVersion: snapshot.storage.k8s.io/v1
metadata:
  annotations:
    snapshot.storage.kubernetes.io/is-default-class: "true"
  name: longhorn-snapshot-vsc
driver: driver.longhorn.io
deletionPolicy: Delete
parameters:
  type: snap # a CSI snapshot maps to a Longhorn snapshot

```

For more information on configuring Longhorn snapshots, see the [Longhorn documentation](#).

At this time (Feb 2022), volume snapshotting is an alpha feature in the vSphere CSI driver and not enabled by default. If you are interested in trying it out, please consult VMware's documentation.

Next, consider *granting users access to VolSync's custom resources* so that they can manage their own data replication.

Continue to the *usage docs*.



## 2.1 Mover permission model

### Contents

#### Mover permission model

- *Affected movers*
- *Controlling mover permissions*
- *Mover's security context*
- *Privilege escalation when using privileged movers*
- *Using rsync-tls with UID 0*

VolSync's data movers are responsible for copying the data from one location to the other. These data movers run as Pods in the user's Namespace, where it can have access to the data PVCs that it needs to replicate.

The data movers need to run with sufficient privileges to be able to read and write the affected data. In most cases, running the mover with the same permissions that are granted to the workload in the Namespace is sufficient.

In some cases, it is necessary to run the data movers with elevated privileges. The main example of this is where the UID/GID of files need to be preserved, particularly for ReadWriteMany PVCs. In this case, the mover Pod needs to be granted sufficient capabilities to read/write files regardless of their ownership and to modify that ownership.

The choice of whether to run the data movers as normal users or with elevated privileges depends on the data to be replicated and the security model for the cluster(s).

### 2.1.1 Affected movers

The current set of movers that support this dual permission model is:

- rclone
- restic
- rsync-tls
- syncthing

---

**Note:** The legacy rsync mover that uses ssh as the transport only supports the elevated permission model.

---

## 2.1.2 Controlling mover permissions

The VolSync operator is responsible for managing the data mover Pods and their associated ServiceAccounts. By default, the supported movers will be run with normal user privileges for movers that support this dual permission model.

To signal that the movers in a particular Namespace should be granted additional permissions, an annotation must be added to the user's Namespace. VolSync checks for the annotation `volsync.backube/privileged-movers` to see if it has a value of `true` before granting elevated privileges to the mover Pods.

For example, the following command will annotate a namespace to allow privileged movers:

```
$ kubectl annotate ns/elevated-demo volsync.backube/privileged-movers=true
namespace/elevated-demo annotated

$ kubectl get ns/elevated-demo -oyaml
apiVersion: v1
kind: Namespace
metadata:
  annotations:
    openshift.io/sa.scc.mcs: s0:c26,c20
    openshift.io/sa.scc.supplemental-groups: 1000690000/10000
    openshift.io/sa.scc.uid-range: 1000690000/10000
    volsync.backube/privileged-movers: "true"
  creationTimestamp: "2022-12-06T16:34:54Z"
  labels:
    kubernetes.io/metadata.name: elevated-demo
    pod-security.kubernetes.io/audit: restricted
    pod-security.kubernetes.io/audit-version: v1.24
    pod-security.kubernetes.io/warn: restricted
    pod-security.kubernetes.io/warn-version: v1.24
  name: elevated-demo
  resourceVersion: "507456"
  uid: 7f3d2184-876b-4f70-9b1d-12462ebda512
spec:
  finalizers:
  - kubernetes
status:
  phase: Active
```

Since the annotation must be added at the Namespace level, cluster administrators can control which Namespaces will have access to movers with elevated permissions.

## 2.1.3 Mover's security context

Kubernetes supports [setting a security context](#) for Pods (and individual containers) that controls security aspects such as which UID or GID they are assigned or which supplemental groups they are a member of. The VolSync movers can also have their security context configured by setting a PodSecurityContext in the `.spec.<mover>.moverSecurityContext` field of ReplicationSource and ReplicationDestination objects. This allows matching the permissions of the mover to that of the primary workload in the Namespace.

As general guidance, if the primary workload specifies a security context, that same security context should be used for VolSync.

## 2.1.4 Privilege escalation when using privileged movers

By default, movers with elevated privileges are not permitted. This is because users with access to the Namespace can leverage the data mover's ServiceAccount to run their own Pods with the same permissions granted to the data mover. In the case of privileged movers, this would allow normal users to run Pods with a UID of 0 (root) and to gain access to the DAC\_OVERRIDE capability, among others.

## 2.1.5 Using rsync-tls with UID 0

When running unprivileged, the data movers explicitly drop all capabilities to conform to the restricted PSS. For Kubernetes distributions that do not automatically assign non-root UIDs, this causes the data movers to run as UID 0, but without any of the normal "superuser" abilities of root. While most movers are able to handle this case easily, the rsync-tls mover cannot due to a limitation of rsync.

When using rsync-tls, ensure that the mover is either running with a non-zero UID or is run with elevated privileges via the VolSync Namespace annotation.

## 2.2 Mover resource requirements

VolSync's data movers do not run with any specific limits or requests by default. Each mover's spec can be modified to set resource requests to set limits or requests.

Note that setting these values can have negative affects as mover pods can fail to be scheduled if requests are set too high or crash due to lack of resources if limits are set.

Each mover spec has a spec section where `moverResources` can be set. Here is an example restic replicationsource that sets resource requests for CPU and memory:

```
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: source
  namespace: "test-ns"
spec:
  sourcePVC: data-source
  trigger:
    manual: once
  restic:
    pruneIntervalDays: 1
    repository: restic-secret
    retain:
      hourly: 3
      daily: 2
      monthly: 1
    copyMethod: Snapshot
    cacheCapacity: 1Gi
    # Set specific resource requests for the mover container
    moverResources:
      requests:
        memory: "64Mi"
        cpu: "250m"
```

For more information about resource requirements and limits in kubernetes, see [Resource Management for Pods and Containers](#).

## 2.3 Triggers

There are three types of triggers in volsync:

1. Always - no trigger, always run.
2. Schedule - defined by a cronspec.
3. Manual - request to trigger once.

See the sections below with details on each trigger type.

### 2.3.1 Always

```
spec:  
  trigger: {}
```

This option is set either by omitting the trigger field completely or by setting it to empty object. In both cases the effect is the same - keep replicating all the time.

When using Rsync-based replication, the destination should be set to always-listen for incoming replications from the source. Therefore, the default configuration for rsync destination is with no trigger, which keeps waiting for the next trigger by the source to connect.

In this case `status.nextSyncTime` will not be set, but `status.lastSyncTime` will be set at the end of every replication.

### 2.3.2 Schedule

```
spec:  
  trigger:  
    schedule: "*/6 * * * *"
```

The synchronization schedule, `.spec.trigger.schedule`, is defined by a [cronspect](#), making the schedule very flexible. Both intervals (shown above) as well as specific times and/or days can be specified.

In this case `status.nextSyncTime` will be set to the next schedule time based on the cronspec, and `status.lastSyncTime` will be set at the end of every replication.

### 2.3.3 Manual

```
spec:  
  trigger:  
    manual: my-manual-id-1
```

Manual trigger is used for running one replication and wait for it to complete. This is useful to control the replication schedule from an external automation (for example using quiesce for live migration).

To use the manual trigger choose a string value and set it in `spec.trigger.manual` which will start a replication. Once replication completes, `status.lastManualSync` will be set to the same string value. As long as these two

values are the same there will be no trigger, and the replication will remain paused, until further updates to the trigger spec.

After setting the manual trigger in spec, the user should watch for `status.lastManualSync` and wait for it to have the expected value, which means that the manual trigger completed. If needed, the user can then continue to update `spec.trigger.manual` to a new value in order to trigger another replication.

Something to keep in mind when using manual trigger - the update of `spec.trigger.manual` by itself does not interrupt a running replication, and `status.lastManualSync` will simply be set to the value from the spec when the current replication completes. This means that to make sure we know when the replication started, and that it includes the latest data, it is recommended to wait until `status.lastManualSync` equals to `spec.trigger.manual` before setting to a new value.

In this case `status.nextSyncTime` will not be set, but `status.lastSyncTime` will be set at the end of every replication.

Here is an example of how to use manual trigger to run two replications:

```
MANUAL=first
SOURCE=source1

# create source replication with first manual trigger (will start immediately)
kubectl create -f - <<EOF
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: $SOURCE
spec:
  trigger:
    manual: $MANUAL
  ...
EOF

# waiting for first trigger to complete...
while [ "$LAST_MANUAL_SYNC" != "$MANUAL" ]
do
  sleep 1
  LAST_MANUAL_SYNC=$(kubectl get replicationsource $SOURCE --template={{.status.
↪lastManualSync}})
  echo " - LAST_MANUAL_SYNC: $LAST_MANUAL_SYNC"
done

# set a second manual trigger
MANUAL=second
kubectl patch replicationsources $SOURCE --type merge -p '{"spec":{"trigger":{"manual":"'
↪$MANUAL'}}}'

# waiting for second trigger to complete...
while [ "$LAST_MANUAL_SYNC" != "$MANUAL" ]
do
  sleep 1
  LAST_MANUAL_SYNC=$(kubectl get replicationsource $SOURCE --template={{.status.
↪lastManualSync}})
  echo " - LAST_MANUAL_SYNC: $LAST_MANUAL_SYNC"
done
```

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```
# after second trigger is done we delete the replication...  
kubect1 delete replicationsources $SOURCE
```

## 2.4 PVC annotations for copy triggers

When doing a replication of a source PVC, it can be desirable to perform some operation such as a quiesce on the application source prior to performing the replication. VolSync has not implemented any hooks in order to do this as they can require privileges such as being able to exec into users containers.

A user can always schedule their replications themselves via manual triggers if they want to perform some automation, but now there's also the option of using annotations on the source PVC.

With a ReplicationSource that uses a CopyMode of Snapshot or Clone, it's possible to use annotations on the Source PVC in order to coordinate when the snapshot or clone gets taken during a replication cycle.

When VolSync schedules a synchronization for the ReplicationSource, if the source has the annotation `volsync.backube/use-copy-trigger`, then VolSync will pause before taking the Snapshot or Clone and wait for the user to indicate/trigger that VolSync can proceed. After which VolSync will also update via pvc annotations once the Snapshot or Clone is complete so that the user can choose to perform actions such as an unquiesce.

### 2.4.1 Source PVC annotations being used

For the user to edit/modify (VolSync will not touch these annotations):

Listing 1: User-level Source PVC annotations

```
volsync.backube/use-copy-trigger  
volsync.backube/copy-trigger
```

For VolSync to edit/modify (Users should not modify these annotations):

Listing 2: VolSync Source PVC annotations

```
volsync.backube/latest-copy-status  
volsync.backube/latest-copy-trigger
```

### 2.4.2 Mover support

The current set of movers that support PVC annotations for copy triggers is:

- rclone
- restic
- rsync-tls
- rsync

### 2.4.3 Example Source PVC annotation coordination with VolSync

Here is an example scenario using a `replicationsource` with `restic` to backup a PVC to a remote store. PVC copy triggers will be used in order to coordinate performing actions on the application using the PVC prior to the snapshot being taken.

Listing 3: Example ReplicationSource

```
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: test-rs
  namespace: test-ns
spec:
  sourcePVC: data-pvc
  trigger:
    schedule: "*/30 * * * *"
  restic:
    pruneIntervalDays: 1
    repository: restic-secret
    retain:
      hourly: 3
      daily: 2
      monthly: 1
    copyMethod: Snapshot
    cacheCapacity: 1Gi
```

The example `replicationsource` will run a sync every 30 minutes and make a snapshot of the source PVC called `data-pvc` every time it syncs.

Listing 4: Source PVC

```
apiVersion: v1
kind: PersistentVolumeClaim
metadata:
  name: data-pvc
  namespace: test-ns
  annotations:
    # If this annotation is set with any value, VolSync will use copy triggers
    volsync.backube/use-copy-trigger: ""
spec:
  accessModes: [ReadWriteOnce]
  resources:
    requests:
      storage: 10Gi
```

When the `replicationsource` runs a sync, it will see the `volsync.backube/use-copy-trigger` annotation on the source PVC and pause before taking a snapshot.

VolSync will then add the `volsync.backube/latest-copy-status` annotation with value `WaitingForTrigger`.

Listing 5: Source PVC - VolSync is waiting for copy trigger before taking snapshot or clone

```
apiVersion: v1
kind: PersistentVolumeClaim
metadata:
  name: data-pvc
  namespace: test-ns
  annotations:
    volsync.backube/use-copy-trigger: ""
    volsync.backube/latest-copy-status: "WaitingForTrigger"
...
```

At this point the user can run commands to pause or quiesce their application.

---

**Note:** VolSync will update the `replicationsource.status.latestMoverStatus` with an error if the user does not set a `copy-trigger` within 10 minutes of setting the `volsync.backube/latest-copy-status` to `WaitingForTrigger`. VolSync will keep reconciling the `replicationsource` however.

---

Now to indicate that VolSync can proceed to create a copy of the source PVC (a snapshot or clone), the user needs to add the annotation `volsync.backube/copy-trigger` to a unique value.

Listing 6: Source PVC - User sets a new unique copy-trigger annotation on the PVC

```
apiVersion: v1
kind: PersistentVolumeClaim
metadata:
  name: data-pvc
  namespace: test-ns
  annotations:
    volsync.backube/use-copy-trigger: ""
    volsync.backube/copy-trigger: "trigger-1" # User updated to unique value
    volsync.backube/latest-copy-status: "WaitingForTrigger"
...
```

VolSync will now start to make the copy of the PVC (a snapshot or clone) and update the `volsync.backube/latest-copy-status` to `InProgress`.

Listing 7: Source PVC - VolSync proceeds to take copy (snapshot or clone)

```
apiVersion: v1
kind: PersistentVolumeClaim
metadata:
  name: data-pvc
  namespace: test-ns
  annotations:
    volsync.backube/use-copy-trigger: ""
    volsync.backube/copy-trigger: "trigger-1"
    volsync.backube/latest-copy-status: "InProgress" # Snapshot is being taken
...
```

Once the snapshot or clone is complete, VolSync will again update the `volsync.backube/latest-copy-status`, this time to `Completed`. VolSync will also add another annotation `volsync.backube/latest-copy-trigger` which will match the value of the `volsync.backube/copy-trigger` set by the user.

Listing 8: Source PVC - VolSync has completed copy (snapshot or clone)

```
apiVersion: v1
kind: PersistentVolumeClaim
metadata:
  name: data-pvc
  namespace: test-ns
  annotations:
    volsync.backube/use-copy-trigger: ""
    volsync.backube/copy-trigger: "trigger-1"
    volsync.backube/latest-copy-status: "Completed" # Snapshot is complete
    volsync.backube/latest-copy-trigger: "trigger-1"
...
```

VolSync will proceed to run the sync at this point, but since the copy has completed, users can now perform actions on their application such as an unquiesce.

Next sync iteration, VolSync will again update the `volsync.backube/latest-copy-status` to `WaitingForTrigger`.

Listing 9: Source PVC - VolSync is again waiting for copy trigger before taking snapshot or clone

```
apiVersion: v1
kind: PersistentVolumeClaim
metadata:
  name: data-pvc
  namespace: test-ns
  annotations:
    volsync.backube/use-copy-trigger: ""
    volsync.backube/copy-trigger: "trigger-1"
    volsync.backube/latest-copy-status: "WaitingForTrigger" # The next sync is waiting
↔ for a new copy-trigger
    volsync.backube/latest-copy-trigger: "trigger-1"
...
```

VolSync will wait before making a copy of the Source PVC until the user updates `volsync.backube/copy-trigger` to a value that does not match the value of `volsync.backube/latest-copy-trigger`.

## 2.5 Metrics & monitoring

In order to support monitoring of replication relationships, VolSync exports a number of metrics that can be scraped with Prometheus. These metrics permit monitoring whether volumes are “in sync” and how long the synchronization iterations take.

### 2.5.1 Available metrics

The following metrics are provided by VolSync for each replication object (source or destination):

#### **volsync\_missed\_intervals\_total**

This is a count of the number of times that a replication iteration failed to complete before the next scheduled start. This metric is only valid for objects that have a schedule (`.spec.trigger.schedule`) specified. For example, when using the `rsync` mover with a schedule on the source but not on the destination, only the metric for the source side is meaningful.

#### **volsync\_sync\_duration\_seconds**

This is a summary of the time required for each sync iteration. By monitoring this value it is possible to determine how much “slack” exists in the synchronization schedule (i.e., how much less is the sync duration than the schedule frequency).

#### **volsync\_volume\_out\_of\_sync**

This is a gauge that has the value of either “0” or “1”, with a “1” indicating that the volumes are not currently synchronized. This may be due to an error that is preventing synchronization or because the most recent synchronization iteration failed to complete prior to when the next should have started. This metric also requires a schedule to be defined.

Each of the above metrics include the following labels to assist with monitoring and alerting:

#### **obj\_name**

This is the name of the VolSync CustomResource

#### **obj\_namespace**

This is the Kubernetes Namespace that contains the CustomResource

#### **role**

This contains the value of either “source” or “destination” depending on whether the CR is a `ReplicationSource` or a `ReplicationDestination`.

#### **method**

This indicates the synchronization method being used. Currently, “rsync” or “rclone”.

As an example, the below raw data comes from a single `rsync`-based relationship that is replicating data using the `ReplicationSource` `dsrc` in the `srcns` namespace to the `ReplicationDestination` `dest` in the `dstns` namespace.

Listing 10: Example raw metrics data

```
$ curl -s http://127.0.0.1:8080/metrics | grep volsync

# HELP volsync_missed_intervals_total The number of times a synchronization failed to
↪complete before the next scheduled start
# TYPE volsync_missed_intervals_total counter
volsync_missed_intervals_total{method="rsync",obj_name="dest",obj_namespace="dstns",
↪role="destination"} 0
volsync_missed_intervals_total{method="rsync",obj_name="dsrc",obj_namespace="srcns",
↪role="source"} 0
# HELP volsync_sync_duration_seconds Duration of the synchronization interval in seconds
(continues on next page)
```

(continued from previous page)

```

# TYPE volsync_sync_duration_seconds summary
volsync_sync_duration_seconds{method="rsync",obj_name="dest",obj_namespace="dstns",role=
↪"destination",quantile="0.5"} 179.725047058
volsync_sync_duration_seconds{method="rsync",obj_name="dest",obj_namespace="dstns",role=
↪"destination",quantile="0.9"} 544.86628289
volsync_sync_duration_seconds{method="rsync",obj_name="dest",obj_namespace="dstns",role=
↪"destination",quantile="0.99"} 544.86628289
volsync_sync_duration_seconds_sum{method="rsync",obj_name="dest",obj_namespace="dstns",
↪role="destination"} 828.711667153
volsync_sync_duration_seconds_count{method="rsync",obj_name="dest",obj_namespace="dstns
↪",role="destination"} 3
volsync_sync_duration_seconds{method="rsync",obj_name="dsrc",obj_namespace="srcns",role=
↪"source",quantile="0.5"} 11.547060835
volsync_sync_duration_seconds{method="rsync",obj_name="dsrc",obj_namespace="srcns",role=
↪"source",quantile="0.9"} 12.013468222
volsync_sync_duration_seconds{method="rsync",obj_name="dsrc",obj_namespace="srcns",role=
↪"source",quantile="0.99"} 12.013468222
volsync_sync_duration_seconds_sum{method="rsync",obj_name="dsrc",obj_namespace="srcns",
↪role="source"} 33.317039014
volsync_sync_duration_seconds_count{method="rsync",obj_name="dsrc",obj_namespace="srcns
↪",role="source"} 3
# HELP volsync_volume_out_of_sync Set to 1 if the volume is not properly synchronized
# TYPE volsync_volume_out_of_sync gauge
volsync_volume_out_of_sync{method="rsync",obj_name="dest",obj_namespace="dstns",role=
↪"destination"} 0
volsync_volume_out_of_sync{method="rsync",obj_name="dsrc",obj_namespace="srcns",role=
↪"source"} 0

```

## 2.5.2 Obtaining metrics

The above metrics can be collected by Prometheus. If the cluster does not already have a running instance set to scrape metrics, one will need to be started.

### Configuring Prometheus

Kubernetes

OpenShift

The following steps start a simple Prometheus instance to scrape metrics from VolSync. Some platforms may already have a running Prometheus operator or instance, making these steps unnecessary.

Start the Prometheus operator:

```

$ kubectl apply -f https://raw.githubusercontent.com/prometheus-operator/prometheus-
↪operator/v0.46.0/bundle.yaml

```

Start Prometheus by applying the following block of yaml via:

```

$ kubectl create ns volsync-system
$ kubectl -n volsync-system apply -f -

```

```

apiVersion: v1
kind: ServiceAccount
metadata:
  name: prometheus
---
apiVersion: rbac.authorization.k8s.io/v1
kind: ClusterRole
metadata:
  name: prometheus
rules:
  - apiGroups: [""]
    resources:
      - nodes
      - services
      - endpoints
      - pods
    verbs: ["get", "list", "watch"]
  - apiGroups: [""]
    resources:
      - configmaps
    verbs: ["get"]
  - nonResourceURLs: ["/metrics"]
    verbs: ["get"]
---
apiVersion: rbac.authorization.k8s.io/v1
kind: ClusterRoleBinding
metadata:
  name: prometheus
roleRef:
  apiGroup: rbac.authorization.k8s.io
  kind: ClusterRole
  name: prometheus
subjects:
  - kind: ServiceAccount
    name: prometheus
    namespace: volsync-system # Change if necessary!
---
apiVersion: monitoring.coreos.com/v1
kind: Prometheus
metadata:
  name: prometheus
spec:
  serviceAccountName: prometheus
  serviceMonitorSelector:
    matchLabels:
      control-plane: volsync-controller
  resources:
    requests:
      memory: 400Mi

```

If necessary, create a [monitoring configuration](#) in the `openshift-user-workload-monitoring` namespace and enable user workload monitoring:

Listing 11: Example user workload monitoring configuration

```
---
apiVersion: v1
kind: ConfigMap
metadata:
  name: user-workload-monitoring-config
  namespace: openshift-user-workload-monitoring
data:
  config.yaml: |
    # Allocate persistent storage for user Prometheus
    prometheus:
      volumeClaimTemplate:
        spec:
          resources:
            requests:
              storage: 40Gi
    # Allocate persistent storage for user Thanos Ruler
    thanosRuler:
      volumeClaimTemplate:
        spec:
          resources:
            requests:
              storage: 40Gi
```

Listing 12: Enabling user workload monitoring

```
---
apiVersion: v1
kind: ConfigMap
metadata:
  name: cluster-monitoring-config
  namespace: openshift-monitoring
data:
  config.yaml: |
    # Allocate persistent storage for alertmanager
    alertmanagerMain:
      volumeClaimTemplate:
        spec:
          resources:
            requests:
              storage: 40Gi
    # Enable user workload monitoring stack
    enableUserWorkload: true
    # Allocate persistent storage for cluster prometheus
    prometheusK8s:
      volumeClaimTemplate:
        spec:
          resources:
            requests:
              storage: 40Gi
```

## Monitoring VolSync

The metrics port for VolSync is (by default) [protected via kube-auth-proxy](#). In order to grant Prometheus the ability to scrape the metrics, its ServiceAccount must be granted access to the `volsync-metrics-reader` ClusterRole. This can be accomplished by (substitute in the namespace & SA name of the Prometheus server):

```
$ kubectl create clusterrolebinding metrics --clusterrole=volsync-metrics-reader --
↪serviceaccount=<namespace>:<service-account-name>
```

Optionally, authentication of the metrics port can be disabled by setting the Helm chart value `metrics.disableAuth` to `false` when deploying VolSync.

A ServiceMonitor needs to be defined in order to scrape metrics. If the ServiceMonitor CRD was defined in the cluster when the VolSync chart was deployed, this has already been added. If not, apply the following into the namespace where VolSync is deployed. Note that the `control-plane` labels may need to be adjusted.

Listing 13: VolSync ServiceMonitor

```
---
apiVersion: monitoring.coreos.com/v1
kind: ServiceMonitor
metadata:
  name: volsync-monitor
  namespace: volsync-system
  labels:
    control-plane: volsync-controller
spec:
  endpoints:
    - interval: 30s
      path: /metrics
      port: https
      scheme: https
      tlsConfig:
        # Using self-signed cert for connection
        insecureSkipVerify: true
  selector:
    matchLabels:
      control-plane: volsync-controller
```

## 2.6 Rclone-based replication

### 2.6.1 Rclone Database Example

The following example will use the Rclone replication method to replicate a sample MySQL database.

First, create the source namespace and deploy the source MySQL database.

```
$ kubectl create ns source
$ kubectl annotate namespace source volsync.backube/privileged-movers="true"
```

**Note:** The second command to annotate the namespace is used to enable the rclone data mover to run in privileged mode. This is because this simple example runs MySQL as root. For your own applications, you can run unprivileged

by setting the `moverSecurityContext` in your `ReplicationSource/ReplicationDestination` to match that of your application in which case the namespace annotation will not be required. See the [permission model documentation](#) for more details.

Deploy the source MySQL database.

```
$ kubectl create -f examples/source-database/ -n source
```

Verify the database is running.

```
$ kubectl get pods -n source
NAME                READY   STATUS    RESTARTS   AGE
mysql-8b9c5c8d8-24w6g  1/1     Running   0           17s
```

Add a new database.

```
$ kubectl exec --stdin --tty -n source $(kubectl get pods -n source | grep mysql | awk '
→{print $1}') -- /bin/bash
$ mysql -u root -p$MYSQL_ROOT_PASSWORD
> show databases;
+-----+
| Database          |
+-----+
| information_schema |
| mysql              |
| performance_schema |
| sys                |
+-----+
4 rows in set (0.00 sec)

> create database synced;
> exit
$ exit
```

Now edit `examples/rclone/rclone.conf` with your rclone configuration, or you can deploy minio as object-storage to use with the examples.

To start minio in your cluster, run:

```
$ hack/run-minio.sh
```

If using minio then you can edit `examples/rclone/rclone.conf` to match the following:

Listing 14: rclone.conf for use with local minio

```
[rclone-bucket]
type = s3
provider = Minio
env_auth = false
access_key_id = access
secret_access_key = password
region = us-east-1
endpoint = http://minio.minio.svc.cluster.local:9000
```

## VolSync

---

Now, deploy the `rclone-secret` followed by `ReplicationSource` configuration.

```
$ kubectl create secret generic rclone-secret --from-file=rclone.conf=./examples/rclone/
↳rclone.conf -n source
$ kubectl create -f examples/rclone/volsync_v1alpha1_replicationsource.yaml -n source
```

To verify the replication has completed describe the `Replication source`.

```
$ kubectl describe ReplicationSource -n source database-source
```

From the output, the success of the replication can be seen by the following lines:

```
Status:
Conditions:
  Last Transition Time: 2021-01-18T21:50:59Z
  Message:             Reconcile complete
  Reason:              ReconcileComplete
  Status:              True
  Type:                Reconciled
  Next Sync Time:     2021-01-18T22:00:00Z
```

At Next Sync Time VolSync will create the next Rclone data mover job.

---

To complete the replication, create a destination, deploy `rclone-secret` and `ReplicationDestination` on the destination.

```
$ kubectl create ns dest
$ kubectl annotate namespace dest volsync.backube/privileged-movers="true"
$ kubectl create secret generic rclone-secret --from-file=rclone.conf=./examples/rclone/
↳rclone.conf -n dest
$ kubectl create -f examples/rclone/volsync_v1alpha1_replicationdestination.yaml -n dest
```

Once the `ReplicationDestination` is deployed, VolSync will create a Rclone data mover job on the destination side. At the end of the each successful iteration, the `ReplicationDestination` is updated with the latest snapshot image.

Now deploy the MySQL database to the `dest` namespace which will use the data that has been replicated.

The PVC uses the VolSync volume populator feature and sets the `ReplicationDestination` as its `dataSourceRef`. This will populate the PVC with the latest snapshot contents from the `ReplicationDestination`.

Create the Deployment, Service, PVC, and Secret.

```
# Start the database
$ kubectl create -n dest -f examples/destination-database/
```

Validate that the `mysql` pod is running within the environment.

```
$ kubectl get pods -n dest
NAME                                READY   STATUS    RESTARTS   AGE
mysql-8b9c5c8d8-v6tg6              1/1    Running   0          38m
```

Connect to the `mysql` pod and list the databases to verify the synced database exists.

```

$ kubectl exec --stdin --tty -n dest $(kubectl get pods -n dest | grep mysql | awk '
↳ {print $1}') -- /bin/bash
$ mysql -u root -p$MYSQL_ROOT_PASSWORD
> show databases;
+-----+
| Database          |
+-----+
| information_schema |
| mysql              |
| performance_schema |
| synced             |
| sys                 |
+-----+
5 rows in set (0.00 sec)

> exit
$ exit

```

## 2.6.2 Understanding rclone-secret

The Rclone Secret provides the configuration details to locate and access the intermediary storage system. It is mounted as a secret on the Rclone data mover pod and provided to the Rclone executable.

The secret should contain the key `rclone.conf` that contains the contents of your `rclone.conf` file. Here is an example `rclone.conf`:

```

[aws-s3-bucket]
type = s3
provider = AWS
env_auth = false
access_key_id = *****
secret_access_key = *****
region = <region>
location_constraint = <region>
acl = private

```

In the above example AWS S3 is used as the backend for the intermediary storage system.

- `[aws-s3-bucket]`: Name of the remote
- `type`: Type of storage
- `provider`: Backend provider
- `access_key_id`: AWS credentials
- `secret_access_key`: AWS credentials
- `region`: Region to connect to
- `location_constraint`: Must be set to match the `region`

For detailed instructions follow the [Rclone documentation](#) on how to create an `rclone.conf` configuration file.

## Deploy rclone-secret

Assuming the above example is placed in a local file, `rclone.conf`, the Secret can be created via:

```
# Create the secret (remember to pass the correct namespace name)
$ kubectl create -n source secret generic rclone-secret --from-file=rclone.conf=rclone.
→conf
$ kubectl get -n source secrets
NAME                                TYPE                                DATA  AGE
default-token-g9vdx                 kubernetes.io/service-account-token 3      20s
rclone-secret                       Opaque                              1      17s
```

This Secret should be created on both the source and the destination locations.

## Using RCLONE\_ environment variables in rclone-secret

Rclone has the ability to set environment variables for configuration. Environment variables that start with `RCLONE_` can be set as key/value pairs in the `rclone-secret` and they will be passed to the `rclone` mover job.

Here is an example `rclone-secret` that sets `RCLONE_BWLIMIT` to 5M:

```
apiVersion: v1
kind: Secret
metadata:
  name: rclone-secret
type: Opaque
stringData:
  # equivalent to the --bwlimit command line flag
  RCLONE_BWLIMIT: 5M
  # rclone.conf
  rclone.conf: |
    [s3-bucket]
    type = s3
    provider = Minio
    env_auth = false
    access_key_id = user1
    secret_access_key = abc123
    region = us-east-1
    endpoint = http://minio.minio.svc.cluster.local:9000
```

For detailed information on Rclone environment variables see the [Rclone environment variable documentation](#).

### Contents

#### Rclone-based replication

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  - *Source status*
  - *Additional source options*
- *Destination configuration*
  - *Destination status*
  - *Additional destination options*
- *Using a custom certificate authority*

Rclone-based replication supports 1:many asynchronous replication of volumes for use cases such as:

- High fan-out data replication from a central site to many (edge) sites

With this method, VolSync synchronizes data from a ReplicationSource to a ReplicationDestination using [Rclone](#) via an intermediary object storage location like AWS S3.

The Rclone method uses a “push” and “pull” model for the data replication. This requires a schedule or other trigger on both the source and destination sides to trigger the replication iterations.

During each synchronization iteration:

- A point-in-time (PiT) copy of the source volume is created using CSI drivers. This copy will be used as the source data.
- The copy is attached to an Rclone data mover job pod which uses the contents of the `rclone-secret` to connect to the intermediary object storage target (e.g., AWS S3).
- The source pod uses `rclone sync` to copy the data to S3.
- On the destination side, a corresponding Rclone mover pod syncs the data from the intermediate object storage into a volume on the destination.
- At the conclusion of the transfer, the destination creates a snapshot copy to preserve a point-in-time copy of the incoming source data.

VolSync is configured via two CustomResources (CRs), one on the source side and one on the destination side of the replication relationship. While there should only be one ReplicationSource pushing data to the intermediate storage, there may be an arbitrary number of ReplicationDestination instances syncing data from the intermediate storage to destination clusters. This enables the model of high fan-out data distribution.

### 2.6.3 Source configuration

An example source configuration is shown below:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: database-source
  namespace: source
spec:
  # The PVC to sync
  sourcePVC: mysql-pv-claim
  trigger:
    # Synchronize every 6 minutes
    schedule: "*/6 * * * *"
  rclone:
    # The configuration section of the rclone config file to use
    rcloneConfigSection: "aws-s3-bucket"
    # The path to the object bucket
    rcloneDestPath: "volsync-test-bucket/mysql-pv-claim"
    # Secret holding the rclone configuration
    rcloneConfig: "rclone-secret"
```

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```

# Method used to generate the PiT copy
copyMethod: Snapshot
# The StorageClass to use when creating the PiT copy (same as source PVC if omitted)
storageClassName: my-sc-name
# The VSC to use if the copy method is Snapshot (default if omitted)
volumeSnapshotClassName: my-vsc-name

```

Since the `copyMethod` specified above is `Snapshot`, the Rclone data mover creates a `VolumeSnapshot` of the source pvc `mysql-pv-claim`. Then it converts this snapshot back into a PVC. If `copyMethod: Clone` were used, the temporary, point-in-time copy would be created by cloning the source PVC to a new PVC directly. This is more efficient, but it is not supported by all CSI drivers.

The synchronization schedule, `.spec.trigger.schedule`, is defined by a `cronspec`, making the schedule very flexible. Both intervals (shown above) as well as specific times and/or days can be specified.

### Source status

Once the `ReplicationSource` is deployed, VolSync updates the `nextSyncTime` in the `ReplicationSource` object.

```

---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
# ... omitted ...
spec:
  rclone:
    copyMethod: Snapshot
    rcloneConfig: rclone-secret
    rcloneConfigSection: aws-s3-bucket
    rcloneDestPath: volsync-test-bucket/mysql-pv-claim
    storageClassName: my-sc-name
    volumeSnapshotClassName: my-vsc-name
  sourcePVC: mysql-pv-claim
  trigger:
    schedule: "*/6 * * * *"
  status:
    conditions:
      lastTransitionTime: 2021-01-18T21:50:59Z
      message: Reconcile complete
      reason: ReconcileComplete
      status: True
      type: Reconciled
    nextSyncTime: 2021-01-18T22:00:00Z

```

## Additional source options

There are a number of more advanced configuration parameters that are supported for configuring the source. All of the following options would be placed within the `.spec.rclone` portion of the ReplicationSource CustomResource.

### accessModes

When using a `copyMethod` of Clone or Snapshot, this field allows overriding the access modes for the point-in-time (PiT) volume. The default is to use the access modes from the source PVC.

### capacity

When using a `copyMethod` of Clone or Snapshot, this allows overriding the capacity of the PiT volume. The default is to use the capacity of the source volume.

### copyMethod

This specifies the method used to create a PiT copy of the source volume. Valid values are:

- **Clone** - Create a new volume by cloning the source PVC (i.e., use the source PVC as the volumeSource for the new volume).
- **Direct** - Do not create a PiT copy. The VolSync data mover will directly use the source PVC.
- **Snapshot** - Create a VolumeSnapshot of the source PVC, then use that snapshot to create the new volume. This option should be used for CSI drivers that support snapshots but not cloning.

### storageClassName

This specifies the name of the StorageClass to use when creating the PiT volume. The default is to use the same StorageClass as the source volume.

### volumeSnapshotClassName

When using a `copyMethod` of Snapshot, this specifies the name of the VolumeSnapshotClass to use. If not specified, the cluster default will be used.

### rcloneConfigSection

This is used to identify the configuration section within `rclone.conf` to use.

### rcloneDestPath

This is the remote storage location in which the persistent data will be uploaded.

Normally the root of this path is the storage bucket name. Any sub paths would be created as folders in the storage bucket.

In the example above, using `volsync-test-bucket/mysql-pv-claim` means that the source pvc will be replicated to the folder called `mysql-pv-claim` in the bucket called `volsync-test-bucket`.

If a unique bucket is used for each PVC to be replicated, then a path with simply the bucket name (such as `volsync-test-bucket`) is sufficient. However if the same bucket will be used for multiple different PVCs (and therefore multiple ReplicationSources), a unique path should be used for each PVC/ReplicationSource.

### rcloneConfig

This specifies the name of a secret to be used to retrieve the Rclone configuration. The *content of the Secret* is an `rclone.conf` file.

### customCA

This option allows a custom certificate authority to be used when making TLS (https) connections to the remote repository.

## 2.6.4 Destination configuration

An example destination configuration is shown here:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: database-destination
  namespace: dest
spec:
  trigger:
    # Every 6 minutes, offset by 3 minutes
    schedule: "3,9,15,21,27,33,39,45,51,57 * * * *"
  rclone:
    rcloneConfigSection: "aws-s3-bucket"
    rcloneDestPath: "volsync-test-bucket/mysql-pvc-claim"
    rcloneConfig: "rclone-secret"
    copyMethod: Snapshot
    accessModes: [ReadWriteOnce]
    capacity: 10Gi
    storageClassName: my-sc
    volumeSnapshotClassName: my-vsc
```

Similar to the replication source, a synchronization schedule is defined `.spec.trigger.schedule`. This indicates when persistent data should be pulled from the remote storage location. It is important that the schedule for the destinations are offset from that of the source to allow the source to finish pushing updates for an iteration prior to the destination attempting to pull them.

In the above example, a 10 GiB RWO volume will be provisioned using the `my-sc` StorageClass to serve as the destination for replicated data. This volume is used by the Rclone data mover to receive the incoming data transfers.

Since the `copyMethod` specified above is `Snapshot`, a VolumeSnapshot of the incoming data will be created at the end of each synchronization interval. It is this snapshot that would be used to gain access to the replicated data. The name of the current VolumeSnapshot holding the latest synced data will be placed in `.status.latestImage`.

### Destination status

VolSync provides status information on the state of the replication via the `.status` field in the ReplicationDestination object:

```
---
API Version: volsync.backube/v1alpha1
Kind: ReplicationDestination
# ... omitted ...
Spec:
  Rclone:
    Access Modes:
      ReadWriteOnce
    Capacity: 10Gi
    Copy Method: Snapshot
    Rclone Config: rclone-secret
    Rclone Config Section: aws-s3-bucket
    Rclone Dest Path: volsync-test-bucket
```

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```

Storage Class Name:      my-sc
Volume Snapshot Class Name: my-vsc
Status:
Conditions:
  Last Transition Time:  2021-01-19T22:16:02Z
  Message:              Reconcile complete
  Reason:               ReconcileComplete
  Status:               True
  Type:                 Reconciled
Last Sync Duration:     7.066022293s
Last Sync Time:        2021-01-19T22:16:02Z
Latest Image:
  API Group:            snapshot.storage.k8s.io
  Kind:                 VolumeSnapshot
  Name:                 volsync-dest-database-destination-20210119221601

```

In the above example,

- `Rclone Dest Path` indicates the intermediary storage system from where data will be transferred to the destination site. In the above example, the intermediary storage system is an S3 bucket.
- No errors were detected (the `Reconciled` condition is `True`).

After at least one synchronization has taken place, the following will also be available:

- `Last Sync Time` contains the time of the last successful data synchronization.
- `Latest Image` references the object with the most recent copy of the data. If the `copyMethod` is `Snapshot`, this will be a `VolumeSnapshot` object. If the `copyMethod` is `Direct`, this will be the PVC that is used as the destination by VolSync.

### Additional destination options

There are a number of more advanced configuration parameters that are supported for configuring the destination. All of the following options would be placed within the `.spec.rclone` portion of the `ReplicationDestination CustomResource`.

#### accessModes

When VolSync creates the destination volume, this specifies the `accessModes` for the PVC. The value should be `ReadWriteOnce` or `ReadWriteMany`.

#### capacity

When VolSync creates the destination volume, this value is used to determine its size. This need not match the size of the source volume, but it must be large enough to hold the incoming data.

#### copyMethod

This specifies how the data should be preserved at the end of each synchronization iteration. Valid values are:

- **Direct** - Do not create a point-in-time copy of the data.
- **Snapshot** - Create a `VolumeSnapshot` at the end of each iteration

#### destinationPVC

Instead of having VolSync automatically provision the destination volume (using `capacity`, `accessModes`, etc.), the name of a pre-existing PVC may be specified here.

### **storageClassName**

When VolSync creates the destination volume, this specifies the name of the StorageClass to use. If omitted, the system default StorageClass will be used.

### **volumeSnapshotClassName**

When using a copyMethod of Snapshot, this value specifies the name of the VolumeSnapshotClass to use when creating a snapshot. If omitted, the system default VolumeSnapshotClass will be used.

### **rcloneConfigSection**

This is used to identify the configuration section within `rclone.conf` to use.

### **rcloneDestPath**

This is the remote storage location in which the persistent data will be downloaded. This should match the `rcloneDestPath` used on the ReplicationSource.

### **rcloneConfig**

This specifies the secret to be used. The secret contains an `rclone.conf` file with the configuration and credentials for the object target.

### **customCA**

This option allows a custom certificate authority to be used when making TLS (https) connections to the remote repository.

For a concrete example, see the [database synchronization example](#).

## 2.6.5 Using a custom certificate authority

Normally, Rclone will use a default set of certificates to verify the validity of remote repositories when making https connections. However, users that deploy with a self-signed certificate will need to provide their CA's certificate via the `customCA` option.

The custom CA certificate needs to be provided in a Secret or ConfigMap to VolSync. For example, if the CA certificate is a file in the current directory named `ca.crt`, it can be loaded as a Secret or a ConfigMap.

Example using a customCA loaded as a secret:

```
$ kubectl create secret generic tls-secret --from-file=ca.crt=./ca.crt
secret/tls-secret created

$ kubectl describe secret/tls-secret
Name:          tls-secret
Namespace:    default
Labels:        <none>
Annotations:   <none>

Type: Opaque

Data
====
ca.crt: 1127 bytes
```

This Secret would then be used in the ReplicationSource and/or ReplicationDestination objects:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
```

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```

name: mydata-backup-with-customca
spec:
  # ... fields omitted ...
rclone:
  # ... other fields omitted ...
customCA:
  secretName: tls-secret
  key: ca.crt

```

To use a customCA in a ConfigMap, specify `configMapName` in the spec instead of `secretName`, for example:

```

---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: mydata-backup-with-customca
spec:
  # ... fields omitted ...
rclone:
  # ... other fields omitted ...
customCA:
  configMapName: tls-configmap-name
  key: ca.crt

```

## 2.7 Restic-based backup

### 2.7.1 Restic Database Example

#### Restic backup

Restic is a fast and secure backup program. The following example will use Restic to create a backup of a source volume.

A MySQL database will be used as the example application.

#### Creating source PVC to be backed up

Create a namespace called `source`

```

$ kubectl create ns source
$ kubectl annotate namespace source volsync.backube/privileged-movers="true"

```

---

**Note:** The second command to annotate the namespace is used to enable the restic data mover to run in privileged mode. This is because this simple example runs MySQL as root. For your own applications, you can run unprivileged by setting the `moverSecurityContext` in your `ReplicationSource/ReplicationDestination` to match that of your application in which case the namespace annotation will not be required. See the [permission model documentation](#) for more details.

---

Deploy the source MySQL database.

```
$ kubectl -n source create -f examples/source-database/
```

Verify the database is running:

```
$ kubectl -n source get pods,pvc,volumesnapshots
```

NAME	READY	STATUS	RESTARTS	AGE
pod/mysql-87f849f8c-n9j7j	1/1	Running	1	58m

NAME	STATUS	VOLUME
→ CAPACITY	ACCESS MODES	STORAGECLASS
→ 4c660d982a0f	2Gi	RWO
persistentvolumeclaim/mysql-pv-claim	Bound	pvc-adbf57f1-6399-4738-87c9-4c660d982a0f
		csi-hostpath-sc
		60m

Add a new database:

```
$ kubectl exec --stdin --tty -n source $(kubectl get pods -n source | grep mysql | awk '
→{print $1}') -- /bin/bash

$ mysql -u root -p$MYSQL_ROOT_PASSWORD

> show databases;
+-----+
| Database           |
+-----+
| information_schema |
| mysql              |
| performance_schema |
| sys                |
+-----+
4 rows in set (0.00 sec)

> create database synced;
> exit

$ exit
```

## Restic Repository Setup

For the purpose of this tutorial we are using minio as the object storage target for the backup.

Start minio:

```
$ hack/run-minio.sh
```

The restic-config Secret configures the Restic repository parameters:

```
---
apiVersion: v1
kind: Secret
metadata:
```

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```

name: restic-config
type: Opaque
stringData:
  # The repository url
  RESTIC_REPOSITORY: s3:http://minio.minio.svc.cluster.local:9000/restic-repo
  # The repository encryption key
  RESTIC_PASSWORD: my-secure-restic-password
  # ENV vars specific to the back end
  # https://restic.readthedocs.io/en/stable/030_preparing_a_new_repo.html
  AWS_ACCESS_KEY_ID: access
  AWS_SECRET_ACCESS_KEY: password

```

The above will backup to a bucket called `restic-repo`. If the same bucket will be used for different PVCs or different uses, then make sure to specify a unique path under `restic-repo`. See [Shared S3 Bucket Notes](#) for more detail.

## ReplicationSource

Start by configuring the source; a minimal example is shown below

```

---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: database-source
  namespace: source
spec:
  sourcePVC: mysql-pv-claim
  trigger:
    schedule: "*/30 * * * *"
  restic:
    pruneIntervalDays: 15
    repository: restic-config
    retain:
      hourly: 1
      daily: 1
      weekly: 1
      monthly: 1
      yearly: 1
    copyMethod: Clone

```

In the above `ReplicationSource` object,

- The PiT copy of the source data `mysql-pv-claim` will be created by cloning the source volume.
- The synchronization schedule, `.spec.trigger.schedule`, is defined by a [cronspec](#), making the schedule very flexible. In this case, it will take a backup every 30 minutes.
- The restic repository configuration is provided via the `restic-config` Secret.
- `pruneIntervalDays` defines the interval between Restic prune operations.
- The `retain` settings determine how many backups should be saved in the repository. Read more about [restic forget](#).

Now, deploy the `restic-config` followed by `ReplicationSource` configuration.

```
$ kubectl create -f examples/restic/source-restic/source-restic.yaml -n source
$ kubectl create -f examples/restic/volsync_v1alpha1_replicationsource.yaml -n source
```

To verify the replication has completed, view the the ReplicationSource .status field.

```
$ kubectl -n source get ReplicationSource/database-source -oyaml

apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: database-source
  namespace: source
spec:
  # ... lines omitted ...
status:
  conditions:
  - lastTransitionTime: "2021-05-17T18:16:35Z"
    message: Reconcile complete
    reason: ReconcileComplete
    status: "True"
    type: Reconciled
  lastSyncDuration: 3m10.261673933s
  lastSyncTime: "2021-05-17T18:19:45Z"
  nextSyncTime: "2021-05-17T18:30:00Z"
  restic: {}
```

In the above output, the lastSyncTime shows the time when the last backup completed.

---

The backup created by VolSync can be seen by directly accessing the Restic repository:

```
# In one window, create a port forward to access the minio server
$ kubectl port-forward --namespace minio svc/minio 9000:9000

# An another, access the repository w/ restic via the above forward
$ AWS_ACCESS_KEY_ID=access AWS_SECRET_ACCESS_KEY=password restic -r s3:http://127.0.0.
↪1:9000/restic-repo snapshots
enter password for repository:
repository 03fd0c91 opened successfully, password is correct
created new cache in /home/jstrunk/.cache/restic
ID          Time                Host      Tags          Paths
-----
caebaa8e   2021-05-17 14:19:42  volsync          /data
-----
1 snapshots
```

There is a snapshot in the restic repository created by the restic data mover.

## Restoring the backup

To restore from the backup, create a destination, deploy restic-config and ReplicationDestination on the destination.

```
$ kubectl create ns dest
$ kubectl annotate namespace dest volsync.backube/privileged-movers="true"
$ kubectl -n dest create -f examples/restic/source-restic/
```

To start the restore, create a empty PVC for the data:

```
$ kubectl -n dest create -f examples/source-database/mysql-pvc.yaml
persistentvolumeclaim/mysql-pv-claim created
```

Create the ReplicationDestination in the dest namespace to restore the data:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: database-destination
spec:
  trigger:
    manual: restore
  restic:
    destinationPVC: mysql-pv-claim
    repository: restic-config
    copyMethod: Direct
```

```
$ kubectl -n dest create -f examples/restic/volsync_v1alpha1_replicationdestination.yaml
```

Once the restore is complete, the `.status.lastManualSync` field will match `.spec.trigger.manual`.

To verify restore, deploy the MySQL database to the dest namespace which will use the data that has been restored from sourcePVC backup.

Create the Deployment, Service, and Secret.

```
$ kubectl create -n dest -f examples/destination-database/mysql-secret.yaml
$ kubectl create -n dest -f examples/destination-database/mysql-deployment.yaml
$ kubectl create -n dest -f examples/destination-database/mysql-service.yaml
```

Validate that the mysql pod is running within the environment.

```
$ kubectl get pods -n dest
NAME                                READY   STATUS    RESTARTS   AGE
mysql-8b9c5c8d8-v6tg6              1/1     Running   0           38m
```

Connect to the mysql pod and list the databases to verify the synced database exists.

```
$ kubectl exec --stdin --tty -n dest $(kubectl get pods -n dest | grep mysql | awk '
↳ {print $1}') -- /bin/bash
$ mysql -u root -p$MYSQL_ROOT_PASSWORD
> show databases;
+-----+
```

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```

| Database          |
+-----+
| information_schema |
| mysql             |
| performance_schema |
| synced           |
| sys              |
+-----+
5 rows in set (0.00 sec)

> exit
$ exit

```

## 2.7.2 Backing up multiple PVCs to the same S3 bucket

If using the same S3 bucket for multiple backups, then be aware of the following:

- Each PVC to be backed up will need its own separate `restic-config` secret.
- Each `restic-config` secret may use the same s3 bucket name in the `RESTIC_REPOSITORY`, but they must each have a unique path underneath.

### Example of backing up 2 PVCs, `pvc-a` and `pvc-b`:

A `restic-config` and `replicationsource` needs to be created for each pvc and each `replicationsource` must refer to the correct `restic-config`.

For `pvc-a`:

```

---
# Restic-config Secret for pvc-a
apiVersion: v1
kind: Secret
metadata:
  name: restic-config-a
type: Opaque
stringData:
  # The repository url with pvc-a-backup as the subpath under the restic-repo bucket
  RESTIC_REPOSITORY: s3:http://minio.minio.svc.cluster.local:9000/restic-repo/pvc-a-
↪backup
  # The repository encryption key
  RESTIC_PASSWORD: my-secure-restic-password-pvc-a
  # ENV vars specific to the back end
  # https://restic.readthedocs.io/en/stable/030_preparing_a_new_repo.html
  AWS_ACCESS_KEY_ID: access
  AWS_SECRET_ACCESS_KEY: password
---
# ReplicationSource for pvc-a
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:

```

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```

name: replication-source-pvc-a
namespace: source
spec:
  sourcePVC: pvc-a
  trigger:
    schedule: "*/30 * * * *"
  restic:
    pruneIntervalDays: 15
    repository: restic-config-a
    retain:
      hourly: 1
      daily: 1
      weekly: 1
      monthly: 1
      yearly: 1
    copyMethod: Clone

```

For pvc-b:

```

---
# Restic-config Secret for pvc-b
apiVersion: v1
kind: Secret
metadata:
  name: restic-config-b
type: Opaque
stringData:
  # The repository url with pvc-b-backup as the subpath under the restic-repo bucket
  RESTIC_REPOSITORY: s3:http://minio.minio.svc.cluster.local:9000/restic-repo/pvc-b-
↪backup
  # The repository encryption key - using a different key from pvc-a. This will not
↪prevent overwrites
  # or deletes of the data for others who have access to the bucket, but will prevent
↪reads/writes
  # to the restic data in the pvc-b-backup folder for those without this encryption key.
  RESTIC_PASSWORD: my-secure-restic-password-pvc-b
  # ENV vars specific to the back end
  # https://restic.readthedocs.io/en/stable/030_preparing_a_new_repo.html
  AWS_ACCESS_KEY_ID: access
  AWS_SECRET_ACCESS_KEY: password
---
# ReplicationSource for pvc-b
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: replication-source-pvc-b
  namespace: source
spec:
  sourcePVC: pvc-b
  trigger:
    schedule: "*/30 * * * *"

```

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```

restic:
  pruneIntervalDays: 15
  repository: restic-config-b
  retain:
    hourly: 1
    daily: 1
    weekly: 1
    monthly: 1
    yearly: 1
  copyMethod: Clone

```

## Contents

### Backing up using Restic

- *Specifying a repository*
- *Configuring backup*
  - *Backup options*
- *Performing a restore*
  - *Restore options*
- *Using a custom certificate authority*

VolSync supports taking backups of PersistentVolume data using the Restic-based data mover. A `ReplicationSource` defines the backup policy (target, frequency, and retention), while a `ReplicationDestination` is used for restores.

The Restic mover is different than most of VolSync’s other movers because it is not meant for synchronizing data between clusters. This mover is specifically designed for data backup.

## 2.7.3 Specifying a repository

For both backup and restore operations, it is necessary to specify a backup repository for Restic. The repository and connection information are defined in a `restic-config` Secret.

Below is an example showing how to use a repository stored on Minio.

```

apiVersion: v1
kind: Secret
metadata:
  name: restic-config
type: Opaque
stringData:
  # The repository url
  RESTIC_REPOSITORY: s3:http://minio.minio.svc.cluster.local:9000/restic-repo
  # The repository encryption key
  RESTIC_PASSWORD: my-secure-restic-password
  # ENV vars specific to the chosen back end
  # https://restic.readthedocs.io/en/stable/030_preparing_a_new_repo.html
  AWS_ACCESS_KEY_ID: access
  AWS_SECRET_ACCESS_KEY: password

```

This Secret will be referenced for both backup (ReplicationSource) and for restore (ReplicationDestination). The key names in this configuration Secret directly correspond to the environment variable names supported by Restic.

**Note:** When providing credentials for Google Cloud Storage, the `GOOGLE_APPLICATION_CREDENTIALS` key should contain the actual contents of the json credential file, not just the path to the file.

The path used in the `RESTIC_REPOSITORY` is the s3 bucket but can optionally contain a folder name within the bucket as well. This can be useful if multiple PVCs are to be backed up to the same S3 bucket.

As an example one restic-config secret could use:

```
RESTIC_REPOSITORY: s3:http://minio.minio.svc.cluster.local:9000/restic-repo/pvc-1-backup
```

While another (saved in a separate restic-config secret) could use:

```
RESTIC_REPOSITORY: s3:http://minio.minio.svc.cluster.local:9000/restic-repo/pvc-2-backup
```

**Note:** If backing up multiple PVCs to the same S3 bucket, the path underneath the bucket must be unique for each PVC. Each PVC will be backed up with a separate ReplicationSource, and each should use its own separate restic-config secret

Note also by sharing the same s3 bucket this means write access to the s3 bucket will be granted to different replication sources.

**Note:** If necessary, the repository will be automatically initialized (i.e., `restic init`) during the first backup.

## 2.7.4 Configuring backup

A backup policy is defined by a ReplicationSource object that uses the Restic replication method.

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: mydata-backup
spec:
  # The PVC to be backed up
  sourcePVC: mydata
  trigger:
    # Take a backup every 30 minutes
    schedule: "*/30 * * * *"
  restic:
    # Prune the repository (repack to free space) every 2 weeks
    pruneIntervalDays: 14
    # Name of the Secret with the connection information
    repository: restic-config
    # Retention policy for backups
    retain:
      hourly: 6
```

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```

daily: 5
weekly: 4
monthly: 2
yearly: 1
# Clone the source volume prior to taking a backup to ensure a
# point-in-time image.
copyMethod: Clone
# The StorageClass to use when creating the PiT copy (same as source PVC if omitted)
#storageClassName: my-sc-name
# The VSC to use if the copy method is Snapshot (default if omitted)
#volumeSnapshotClassName: my-vsc-name

```

## Backup options

There are a number of additional configuration options not shown in the above example. VolSync's Restic mover options closely follow those of Restic itself.

### accessModes

When using a copyMethod of Clone or Snapshot, this field allows overriding the access modes for the point-in-time (PiT) volume. The default is to use the access modes from the source PVC.

### capacity

When using a copyMethod of Clone or Snapshot, this allows overriding the capacity of the PiT volume. The default is to use the capacity of the source volume.

### copyMethod

This specifies the method used to create a PiT copy of the source volume. Valid values are:

- **Clone** - Create a new volume by cloning the source PVC (i.e., use the source PVC as the volumeSource for the new volume.
- **Direct** - Do not create a PiT copy. The VolSync data mover will directly use the source PVC.
- **Snapshot** - Create a VolumeSnapshot of the source PVC, then use that snapshot to create the new volume. This option should be used for CSI drivers that support snapshots but not cloning.

### storageClassName

This specifies the name of the StorageClass to use when creating the PiT volume. The default is to use the same StorageClass as the source volume.

### volumeSnapshotClassName

When using a copyMethod of Snapshot, this specifies the name of the VolumeSnapshotClass to use. If not specified, the cluster default will be used.

### cacheCapacity

This determines the size of the Restic metadata cache volume. This volume contains cached metadata from the backup repository. It must be large enough to hold the non-pruned repository metadata. The default is 1 Gi.

### cacheStorageClassName

This is the name of the StorageClass that should be used when provisioning the cache volume. It defaults to `.spec.storageClassName`, then to the name of the StorageClass used by the source PVC.

### cacheAccessModes

This is the access mode(s) that should be used to provision the cache volume. It defaults to `.spec.accessModes`, then to the access modes used by the source PVC.

**customCA**

This option allows a custom certificate authority to be used when making TLS (https) connections to the remote repository.

**key**

This is the name of the field within the Secret that holds the CA certificate

**secretName**

This is the name of a Secret containing the CA certificate

**pruneIntervalDays**

This determines the number of days between running `restic prune` on the repository. The prune operation repacks the data to free space, but it can also generate significant I/O traffic as a part of the process. Setting this option allows a trade-off between storage consumption (from no longer referenced data) and access costs.

**repository**

This is the name of the Secret (in the same Namespace) that holds the connection information for the backup repository. The repository path should be unique for each PV. Shared backup repositories are not currently supported.

**retain**

This has sub-fields for `hourly`, `daily`, `weekly`, `monthly`, and `yearly` that allow setting the number of each type of backup to retain. There is an additional field, `within` that can be used to specify a time period during which all backups should be retained. See Restic's [documentation on `-keep-within`](#) for more information.

When more than the specified number of backups are present in the repository, they will be removed via Restic's `forget` operation, and the space will be reclaimed during the next prune.

**unlock**

This can be used to perform a `restic unlock` before the next backup. This is useful if the repository has a stale lock that prevents backups from being made. To run an unlock set `unlock` to a string value. Note that this on its own will not schedule a replication (backup), the next replication will happen according to the trigger spec. Once a replication completes, `status.restic.lastUnlocked` will be set to the same string value from `spec.restic.unlock`. Unlock will not be performed again on subsequent replications unless `spec.restic.unlock` is set to a different value.

## 2.7.5 Performing a restore

Data from a backup can be restored using the ReplicationDestination CR. In most cases, it is desirable to perform a single restore into an empty PersistentVolume.

For example, create a PVC to hold the restored data:

```
---
kind: PersistentVolumeClaim
apiVersion: v1
metadata:
  name: datavol
spec:
  accessModes:
    - ReadWriteOnce
  resources:
    requests:
      storage: 3Gi
```

Restore the data into `datavol`:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: datavol-dest
spec:
  trigger:
    manual: restore-once
  restic:
    repository: restic-repo
    # Use an existing PVC, don't provision a new one
    destinationPVC: datavol
    copyMethod: Direct
```

In the above example, the data will be written directly into the new PVC since it is specified via `destinationPVC`, and no snapshot will be created since a `copyMethod` of `Direct` is used.

The restore operation only needs to be performed once, so instead of using a `cronspec`-based schedule, a *manual trigger* is used. After the restore completes, the `ReplicationDestination` object can be deleted.

The example, shown above, will restore the data from the most recent backup. To restore an older version of the data, the `previous` and `restoreAsOf` fields can be used. See below for more information on their meaning.

## Restore options

There are a number of additional configuration options not shown in the above example.

### accessModes

When VolSync creates the destination volume, this specifies the `accessModes` for the PVC. The value should be `ReadWriteOnce` or `ReadWriteMany`.

### capacity

When VolSync creates the destination volume, this value is used to determine its size. This need not match the size of the source volume, but it must be large enough to hold the incoming data.

### copyMethod

This specifies how the data should be preserved at the end of each synchronization iteration. Valid values are:

- **Direct** - Do not create a point-in-time copy of the data.
- **Snapshot** - Create a `VolumeSnapshot` at the end of each iteration

### destinationPVC

Instead of having VolSync automatically provision the destination volume (using `capacity`, `accessModes`, etc.), the name of a pre-existing PVC may be specified here.

### storageClassName

When VolSync creates the destination volume, this specifies the name of the `StorageClass` to use. If omitted, the system default `StorageClass` will be used.

### volumeSnapshotClassName

When using a `copyMethod` of `Snapshot`, this value specifies the name of the `VolumeSnapshotClass` to use when creating a snapshot. If omitted, the system default `VolumeSnapshotClass` will be used.

### cacheCapacity

This determines the size of the Restic metadata cache volume. This volume contains cached metadata from the backup repository. It must be large enough to hold the non-pruned repository metadata. The default is 1 Gi.

**cacheStorageClassName**

This is the name of the StorageClass that should be used when provisioning the cache volume. It defaults to `.spec.storageClassName`, then to the name of the StorageClass used by the source PVC.

**cacheAccessModes**

This is the access mode(s) that should be used to provision the cache volume. It defaults to `.spec.accessModes`, then to the access modes used by the source PVC.

**customCA**

This option allows a custom certificate authority to be used when making TLS (https) connections to the remote repository.

**key**

This is the name of the field within the Secret that holds the CA certificate

**secretName**

This is the name of a Secret containing the CA certificate

**previous**

Non-negative integer which specifies an offset for how many snapshots ago we want to restore from. When `restoreAsOf` is provided, the behavior is the same, however the starting snapshot considered will be the first one taken before `restoreAsOf`.

**repository**

This is the name of the Secret (in the same Namespace) that holds the connection information for the backup repository. The repository path should be unique for each PV.

**restoreAsOf**

An RFC-3339 timestamp which specifies an upper-limit on the snapshots that we should be looking through when preparing to restore. Snapshots made after this timestamp will not be considered. Note: though this is an RFC-3339 timestamp, Kubernetes will only accept ones with the day and hour fields separated by a T. E.g, `2022-08-10T20:01:03-04:00` will work but `2022-08-10 20:01:03-04:00` will fail.

## 2.7.6 Using a custom certificate authority

Normally, Restic will use a default set of certificates to verify the validity of remote repositories when making https connections. However, users that deploy with a self-signed certificate will need to provide their CA's certificate via the `customCA` option.

The custom CA certificate needs to be provided in a Secret or ConfigMap to VolSync. For example, if the CA certificate is a file in the current directory named `ca.crt`, it can be loaded as a Secret or a ConfigMap.

Example using a customCA loaded as a secret:

```
$ kubectl create secret generic tls-secret --from-file=ca.crt=./ca.crt
secret/tls-secret created

$ kubectl describe secret/tls-secret
Name:          tls-secret
Namespace:    default
Labels:        <none>
Annotations:   <none>

Type: Opaque

Data
```

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```
====
ca.crt: 1127 bytes
```

This Secret would then be used in the ReplicationSource and/or ReplicationDestination objects:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: mydata-backup-with-customca
spec:
  # ... fields omitted ...
  restic:
  # ... other fields omitted ...
  customCA:
    secretName: tls-secret
    key: ca.crt
```

To use a customCA in a ConfigMap, specify configMapName in the spec instead of secretName, for example:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: mydata-backup-with-customca
spec:
  # ... fields omitted ...
  restic:
  # ... other fields omitted ...
  customCA:
    configMapName: tls-configmap-name
    key: ca.crt
```

## 2.8 Rsync-based replication (ssh)

### 2.8.1 Rsync Database Example

The following example will use the Rsync replication method to periodically replicate a MySQL database.

First, create the destination Namespace and deploy the ReplicationDestination object.

```
$ kubectl create ns dest
$ kubectl create -n dest -f dest.yaml
```

The ReplicationDestination has the following configuration:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: database-destination
```

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```
spec:
  rsync:
    serviceType: LoadBalancer
    copyMethod: Snapshot
    capacity: 2Gi
    accessModes: [ReadWriteOnce]
    storageClassName: standard-csi
    volumeSnapshotClassName: csi-gce-pd-vsc
```

A LoadBalancer Service is created by VolSync which will be used by the ReplicationSource to connect to the destination. Record the service IP address as it will be used in the ReplicationSource configuration. (*More information on LoadBalancer vs ClusterIP*)

```
$ kubectl get replicationdestination database-destination -n dest --template={{.status.
↪rsync.address}}
34.133.219.189
```

Now it is time to deploy our database.

```
$ kubectl create ns source
$ kubectl create -n source -f examples/source-database
```

Verify the database is running.

```
$ kubectl get pods -n source
NAME                                READY   STATUS    RESTARTS   AGE
mysql-8b9c5c8d8-24w6g             1/1     Running   0           17s
```

Now create the ReplicationSource items. First, we need the ssh secret from the destination namespace. (*SSH Secret copying details*)

```
# Retrieve the Secret from the destination cluster
$ kubectl get secret -n dest volsync-rsync-dest-src-database-destination -o yaml > /tmp/
↪secret.yaml

# Remove unnecessary fields
$ vi /tmp/secret.yaml
# ^^^ change the namespace to "source"
# ^^^ remove the owner reference (.metadata.ownerReferences)

# Insert the Secret into the source cluster
$ kubectl create -f /tmp/secret.yaml
```

Using the IP address that relates to the ReplicationDestination that was recorded earlier. Create a ReplicationSource object:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: database-source
  namespace: source
spec:
```

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```
sourcePVC: mysql-pv-claim
trigger:
  # Replicate every 5 minutes
  schedule: "*/5 * * * *"
rsync:
  # The name of the Secret we just created
  sshKeys: volsync-rsync-dest-src-database-destination
  # The LoadBalancer address from the ReplicationDestination
  address: 34.133.219.189
  copyMethod: Clone
```

Note: You may need to change the `copyMethod` to `Snapshot` and specify both a `storageClassName` and `volumeSnapshotClassName`, depending on your CSI driver's capabilities.

Once the `ReplicationSource` is created, the initial synchronization should begin. To verify the replication has completed describe the `Replication` source.

```
$ kubectl describe ReplicationSource -n source database-source
```

From the output, the success of the replication can be seen by the following lines:

```
Status:
Conditions:
  Last Transition Time: 2023-08-03T16:07:35Z
  Message:             Reconcile complete
  Reason:              ReconcileComplete
  Status:              True
  Type:                Reconciled
Last Sync Duration:   4.511334577s
Last Sync Time:       2023-08-03T16:09:04Z
Next Sync Time:       2023-08-03T16:10:00Z
```

We will modify the source database by creating an additional database in the `mysql` pod running in the source namespace.

```
$ kubectl exec --stdin --tty -n source $(kubectl get pods -n source | grep mysql | awk '
↳ {print $1}') -- /bin/bash
$ mysql -u root -p$MYSQL_ROOT_PASSWORD
> show databases;
+-----+
| Database          |
+-----+
| information_schema |
| mysql              |
| performance_schema |
| sys                |
+-----+
4 rows in set (0.00 sec)

> create database synced;
> exit
$ exit
```

During the next synchronization iteration, these updates will be replicated to the destination.

Now the mysql database will be deployed to the destination namespace which will use the data that has been replicated.

First we need to wait for the next synchronization iteration to complete so the changes made above to add a new database will be replicated to the destination.

```
$ kubectl get replicationdestination database-destination -n dest --template={{.status.  
↪lastSyncTime}}  
2023-08-03T16:29:01Z
```

When the above has been updated to a newer time as in the example above, then we can proceed to create the Deployment, Service, PVC, and Secret.

The PVC uses the VolSync volume populator feature and sets the ReplicationDestination as its dataSourceRef. This will populate the PVC with the latest snapshot contents from the ReplicationDestination.

```
$ kubectl create -n dest -f examples/destination-database/
```

Validate that the mysql pod is running within the environment.

```
$ kubectl get pods -n dest  
NAME                                READY   STATUS    RESTARTS   AGE  
mysql-8b9c5c8d8-v6tg6              1/1     Running   0           38m
```

Connect to the mysql pod and list the databases to verify the synced database exists.

```
$ kubectl exec --stdin --tty -n dest $(kubectl get pods -n dest | grep mysql | awk '  
↪{print $1}')
```

```
-- /bin/bash  
$ mysql -u root -p$MYSQL_ROOT_PASSWORD  
> show databases;  
+-----+  
| Database |  
+-----+  
| information_schema |  
| mysql |  
| performance_schema |  
| synced |  
| sys |  
+-----+  
5 rows in set (0.00 sec)
```

## 2.8.2 Moving data into Kubernetes w/ Rsync

While VolSync is typically used to replicate data between Kubernetes clusters, it is sometimes necessary to replicate data into a cluster from outside. For example, when containerizing a previously standalone workload, that application's data needs to be moved into the cluster and onto a PVC.

In this configuration, VolSync manages the destination (via a ReplicationDestination object), but instead of having a VolSync ReplicationSource as the sender, it will be an external program that plays that role. It will transmit the data to the destination by initiating the Rsync over SSH connection directly.

The VolSync CLI incorporates this functionality via its migration set of sub-commands. For more information and a walk-through of how to perform synchronization of data into a Kubernetes PVC, please see:

- [CLI/kubectl plugin installation](#)

- *VolSync migration command*

### 2.8.3 Manual SSH key generation

Normally, VolSync generates SSH keys upon the deployment of a ReplicationDestination object but SSH keys can also be provided to VolSync rather than generating new ones. The steps below will describe the process to provide VolSync SSH keys.

#### Generating keys

ssh-keygen can be used to generate SSH keys. The keys that are created will be used to create secrets which will be used by VolSync.

Two key pairs need to be generated. The first SSH key will called destination.

```
$ ssh-keygen -t rsa -b 4096 -f destination -C "" -N ""
Generating public/private rsa key pair.
Your identification has been saved in destination
Your public key has been saved in destination.pub
The key fingerprint is:
SHA256:5gRLpIdeu+3CbKSch7qIsEw6tMNPRdVFUe82ihWw5BU
The key's randomart image is:
+---[RSA 4096]-----+
|      ... o*oE. |
|      +. .o + . |
|     oo=.  o . . |
|    ..+++   o |
|   .oooS.  . + |
|.o  . o*.  o o . |
|*o.o +..o  . . |
|+=o  . =.      |
| .o. o...      |
+-----[SHA256]-----+
```

The second SSH key will be called source:

```
$ ssh-keygen -t rsa -b 4096 -f source -C "" -N ""
Generating public/private rsa key pair.
Your identification has been saved in source
Your public key has been saved in source.pub
The key fingerprint is:
SHA256:NEQNMNsgR43Y3c2dWMyit70JagmbCLNrfakWhWORENU
The key's randomart image is:
+---[RSA 4096]-----+
|  .+OX*O o *.. |
|  .oo*B E = = |
|   .o+o o . |
|   ..o.+ . |
|   . S+ . o |
|  +  +  o . |
|   = o + o . o |
|   . . o +  o |
+-----[SHA256]-----+
```

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```
| . |
+----[SHA256]-----+
```

## Creating secrets

Secrets will be created using the SSH keys that were generated above. These keys must reside on the cluster and namespace that serves as the replication source/destination.

The destination needs access to the public and private destination keys but only the public source key:

```
$ kubectl create ns dest
$ kubectl create secret generic volsync-rsync-dest-dest-database-destination --from-
↪file=destination=destination --from-file=source.pub=source.pub --from-file=destination.
↪pub=destination.pub -n dest
```

The source needs access to the public and private source keys but only the public destination key:

```
$ kubectl create ns source
$ kubectl create secret generic volsync-rsync-dest-src-database-destination --from-
↪file=source=source --from-file=source.pub=source.pub --from-file=destination.
↪pub=destination.pub -n source
```

## Replication destination configuration

The last step to use these keys is to provide the value of `sshKeys` to the `ReplicationDestination` object as a field. Since the name of a key Secret is being provided in `.spec.rsync.sshKeys`, the operator will use this Secret instead of generating its own and placing it in the `.status`.

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: database-destination
  namespace: dest
spec:
  rsync:
    # ... other fields omitted ...
    # This is the name of the Secret we created, above
    sshKeys: volsync-rsync-dest-dest-database-destination
```

The `ReplicationDestination` object can now be created:

```
$ kubectl create -f examples/rsync/volsync_v1alpha1_replicationdestination.yaml
```

The above steps should be repeated to set the `sshKeys` field in the `ReplicationSource`.

## Contents

**Rsync-based replication**

- *Destination configuration*
  - *Destination status*
  - *Additional destination options*
- *Source configuration*
  - *Source status*
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- *Rsync-specific considerations*
  - *Copying the SSH key secret*
  - *Choosing between Service types (ClusterIP vs LoadBalancer)*

Rsync-based replication supports 1:1 asynchronous replication of volumes for use cases such as:

- Disaster recovery
- Mirroring to a test environment
- Sending data to a remote site for processing

With this method, VolSync synchronizes data from a ReplicationSource to a ReplicationDestination using Rsync across an ssh connection. By using Rsync, the amount of data transferred during each synchronization is kept to a minimum, and the ssh connection ensures that the data transfer is both authenticated and secure.

**Warning:** Using rsync replication over SSH is deprecated. Users should move to the *TLS-based rsync* replication method.

The Rsync method is typically configured to use a “push” model for the data replication. A schedule or other trigger is used on the source side of the relationship to trigger each replication iteration.

During each iteration, (optionally) a point-in-time (PiT) copy of the source volume is created and used as the source data. The VolSync Rsync data mover then connects to the destination using ssh (*exposed via a Service*) and sends any updates. At the conclusion of the transfer, the destination (optionally) creates a VolumeSnapshot to preserve the updated data.

VolSync is configured via two CustomResources (CRs), one on the source side and one on the destination side of the replication relationship.

## 2.8.4 Destination configuration

Start by configuring the destination; an example is shown below:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: myDest
  namespace: myns
spec:
  rsync:
    copyMethod: Snapshot
    capacity: 10Gi
```

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```

accessModes: ["ReadWriteOnce"]
storageClassName: my-sc
volumeSnapshotClassName: my-vsc

```

In the above example, a 10 GiB RWO volume will be provisioned using the StorageClass `my-sc` to serve as the destination for replicated data. This volume is used by the `rsync` data mover to receive the incoming data transfers.

Since the `copyMethod` specified above is `Snapshot`, a VolumeSnapshot will be created, using the VolumeSnapshot-Class named `my-vsc`, at the end of each synchronization interval. It is this snapshot that would be used to gain access to the replicated data. The name of the current VolumeSnapshot holding the latest synced data will be placed in the `ReplicationDestination`'s `.status.latestImage`.

## Destination status

VolSync provides status information on the state of the replication via the `.status` field in the `ReplicationDestination` object:

```

---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: myDest
  namespace: myns
spec:
  rsync:
    # ... omitted ...
status:
  conditions:
  - lastTransitionTime: "2021-01-14T19:43:07Z"
    message: Reconcile complete
    reason: ReconcileComplete
    status: "True"
    type: Reconciled
  lastSyncDuration: 31.333710313s
  lastSyncTime: "2021-01-14T19:43:07Z"
  latestImage:
    apiGroup: snapshot.storage.k8s.io
    kind: VolumeSnapshot
    name: volsync-dest-test-20210114194305
  rsync:
    address: 10.99.236.225
    sshKeys: volsync-rsync-dest-src-test

```

In the above example,

- No errors were detected (the `Reconciled` condition is `True`)
- The destination `ssh` server is available at the IP specified in `.status.rsync.address`. This should be used when configuring the corresponding `ReplicationSource`.
- The `ssh` keys for the source to use are available in the Secret `.status.rsync.sshKeys`. This Secret will need to be *copied to the source* so that it can authenticate.

After at least one synchronization has taken place, the following will also be available:

- `lastSyncTime` contains the time of the last successful data synchronization.
- `latestImage` references the object with the most recent copy of the data. If the `copyMethod` is `Snapshot`, this will be a `VolumeSnapshot` object. If the `copyMethod` is `Direct`, this will be the PVC that is used as the destination by VolSync.

### Additional destination options

There are a number of more advanced configuration parameters that are supported for configuring the destination. All of the following options would be placed within the `.spec.rsync` portion of the `ReplicationDestination CustomResource`.

#### **accessModes**

When VolSync creates the destination volume, this specifies the accessModes for the PVC. The value should be `ReadWriteOnce` or `ReadWriteMany`.

#### **capacity**

When VolSync creates the destination volume, this value is used to determine its size. This need not match the size of the source volume, but it must be large enough to hold the incoming data.

#### **copyMethod**

This specifies how the data should be preserved at the end of each synchronization iteration. Valid values are:

- **Direct** - Do not create a point-in-time copy of the data.
- **Snapshot** - Create a `VolumeSnapshot` at the end of each iteration

#### **destinationPVC**

Instead of having VolSync automatically provision the destination volume (using `capacity`, `accessModes`, etc.), the name of a pre-existing PVC may be specified here.

#### **storageClassName**

When VolSync creates the destination volume, this specifies the name of the `StorageClass` to use. If omitted, the system default `StorageClass` will be used.

#### **volumeSnapshotClassName**

When using a `copyMethod` of `Snapshot`, this value specifies the name of the `VolumeSnapshotClass` to use when creating a snapshot. If omitted, the system default `VolumeSnapshotClass` will be used.

#### **sshKeys**

This is the name of a `Secret` that contains the ssh keys for authenticating the connection with the source. If not provided, the destination keys will be automatically generated and corresponding source keys will be placed in a new `Secret`. The name of that new `Secret` will be placed in `.status.rsync.sshKeys`.

#### **serviceType**

VolSync creates a `Service` to allow the source to connect to the destination. This field determines the *type of that Service*. Allowed values are `ClusterIP` or `LoadBalancer`. The default is `ClusterIP`.

#### **port**

This determines the TCP port number that is used to connect via ssh. The default is 22.

## 2.8.5 Source configuration

An example source configuration is shown here:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: mySource
  namespace: source
spec:
  sourcePVC: mysql-pv-claim
  trigger:
    schedule: "*/5 * * * *"
  rsync:
    sshKeys: volsync-rsync-dest-src-database-destination
    address: my.host.com
    copyMethod: Clone
```

In the above example, the PVC named `mysql-pv-claim` will be replicated every 5 minutes using the Rsync replication method. At the start of each iteration, a clone of the source PVC will be created to generate a point-in-time copy for the iteration. The source will then use the ssh keys in the named Secret (`.spec.rsync.sshKeys`) to authenticate to the destination. The connection will be made to the address specified in `.spec.rsync.address`.

The synchronization schedule, `.spec.trigger.schedule`, is defined by a [cronspec](#), making the schedule very flexible. Both intervals (shown above) as well as specific times and/or days can be specified.

When configuring the source, the user must manually create the Secret referenced in `.spec.rsync.sshKeys` by *copying the contents* from the Secret generated previously on the destination (and made available in the destination's `.status.rsync.sshKeys`).

Additionally, this ReplicationSource specifies a `copyMethod` of `Clone` which will directly generate a point-in-time copy of the source volume. However, not all CSI drivers support volume cloning (most notably the `ebs-csi` driver). In such cases, the `copyMethod: Snapshot` can be used to indirectly create a copy of the volume by first taking a snapshot, then restoring it. In this case, the user should also provide the `volumeSnapshotClassName: <vsc-name>` option to indicate which VolumeSnapshotClass VolSync should use when creating the temporary snapshot.

### Source status

The state of the replication from the source's point of view is available in the `.status` field of the ReplicationSource:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: mySource
  namespace: source
spec:
  sourcePVC: mysql-pv-claim
  trigger:
    schedule: "*/5 * * * *"
  rsync:
    # ... omitted ...
status:
```

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```

conditions:
- lastTransitionTime: "2021-01-14T19:42:38Z"
  message: Reconcile complete
  reason: ReconcileComplete
  status: "True"
  type: Reconciled
lastSyncDuration: 7.774288635s
lastSyncTime: "2021-01-14T20:10:07Z"
nextSyncTime: "2021-01-14T20:15:00Z"
rsync: {}

```

In the above example,

- No errors were detected (the Reconciled condition is True).
- The last synchronization was completed at `.status.lastSyncTime` and took `.status.lastSyncDuration` seconds.
- The next scheduled synchronization is at `.status.nextSyncTime`.

---

**Note:** The length of time required to synchronize the data is determined by the rate of change for data in the volume and the bandwidth between the source and destination. In order to avoid missed intervals, ensure there is sufficient bandwidth between the source and destination such that `lastSyncTime` remains safely below the synchronization interval (`.spec.trigger.schedule`).

---

## Additional source options

There are a number of more advanced configuration parameters that are supported for configuring the source. All of the following options would be placed within the `.spec.rsync` portion of the `ReplicationSource CustomResource`.

### accessModes

When using a `copyMethod` of `Clone` or `Snapshot`, this field allows overriding the access modes for the point-in-time (PiT) volume. The default is to use the access modes from the source PVC.

### capacity

When using a `copyMethod` of `Clone` or `Snapshot`, this allows overriding the capacity of the PiT volume. The default is to use the capacity of the source volume.

### copyMethod

This specifies the method used to create a PiT copy of the source volume. Valid values are:

- **Clone** - Create a new volume by cloning the source PVC (i.e., use the source PVC as the volumeSource for the new volume).
- **Direct** - Do not create a PiT copy. The VolSync data mover will directly use the source PVC.
- **Snapshot** - Create a `VolumeSnapshot` of the source PVC, then use that snapshot to create the new volume. This option should be used for CSI drivers that support snapshots but not cloning.

### storageClassName

This specifies the name of the `StorageClass` to use when creating the PiT volume. The default is to use the same `StorageClass` as the source volume.

### volumeSnapshotClassName

When using a `copyMethod` of `Snapshot`, this specifies the name of the `VolumeSnapshotClass` to use. If not specified, the cluster default will be used.

**address**

This specifies the address of the replication destination's ssh server. It can be taken directly from the ReplicationDestination's `.status.rsync.address` field.

**sshKeys**

This is the name of a Secret that contains the ssh keys for authenticating the connection with the destination. If not provided, the source keys will be automatically generated and corresponding destination keys will be placed in a new Secret. The name of that new Secret will be placed in `.status.rsync.sshKeys`.

**path**

This determines the path within the destination volume where the data should be written. In order to create a replica of the source volume, this should be left as the default of `/`.

**port**

This determines the TCP port number that is used to connect via ssh. The default is 22.

**sshUser**

This is the username to use when connecting to the destination. The default value is "root".

For a concrete example, see the [database synchronization example](#).

## 2.8.6 Rsync-specific considerations

This section explains some additional considerations when setting up rsync-based replication.

### Copying the SSH key secret

When setting up the replication, it is necessary for the ReplicationSource to have a copy of the SSH keys so that it can connect to the network endpoint created by the ReplicationDestination. While these keys can be *generated manually*, the recommended method is to allow VolSync to generate the keys when setting up the ReplicationDestination. The resulting Secret should then be copied to the source cluster.

Below is an example of a ReplicationDestination object. The VolSync operator has generated the SSH keys that should be used in the source, and it has provided the name of the Secret containing them in the `.status.rsync.sshKeys` field:

Listing 15: ReplicationDestination with SSH key Secret highlighted

```
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  creationTimestamp: "2022-02-17T13:56:16Z"
  generation: 1
  name: database-destination
  namespace: dest
  resourceVersion: "2307"
  uid: 71f0512b-8a6b-438c-9b9a-0dd2c0f4e7b8
spec:
  rsync:
    accessModes:
      - ReadWriteOnce
    capacity: 2Gi
    copyMethod: Snapshot
    serviceType: ClusterIP
status:
```

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```

conditions:
- lastTransitionTime: "2022-02-17T13:56:30Z"
  message: Reconcile complete
  reason: ReconcileComplete
  status: "True"
  type: Reconciled
lastSyncStartTime: "2022-02-17T13:56:16Z"
rsync:
  address: 10.96.150.107
  sshKeys: volsync-rsync-dst-src-database-destination

```

This Secret exists in the same Namespace as the associated Replicationdestination. It has the following contents:

Listing 16: Secret as created by VolSync

```

apiVersion: v1
data:
  destination.pub: c3NoL...
  source: LS0tL...
  source.pub: c3NoLX...
kind: Secret
metadata:
  creationTimestamp: "2022-02-17T13:56:30Z"
  name: volsync-rsync-dst-src-database-destination
  namespace: dest
  ownerReferences:
  - apiVersion: volsync.backube/v1alpha1
    blockOwnerDeletion: true
    controller: true
    kind: ReplicationDestination
    name: database-destination
    uid: 71f0512b-8a6b-438c-9b9a-0dd2c0f4e7b8
  resourceVersion: "2296"
  uid: 61ab5402-318f-46df-b36f-cd209f3d1455
type: Opaque

```

The above Secret contains 3 fields: the source's public, the source's private, and the destination's public keys.

This Secret must be copied to the source cluster, into the same Namespace where the source PVC and ReplicationSource will reside. That can be accomplished as follows:

```

$ kubectl -n dest get secret volsync-rsync-dst-src-database-destination -oyaml > secret.
↪yaml

```

Once saved to the local file, prepare it for the new cluster/namespace by removing the following fields from the metadata area:

- creationTimestamp
- namespace
- ownerReferences
- resourceVersion
- uid

After removing the above fields, the Secret is as follows:

Listing 17: Prepared secret.yaml

```
apiVersion: v1
data:
  destination.pub: c3NoL...
  source: LS0tL...
  source.pub: c3NoLX...
kind: Secret
metadata:
  name: volsync-rsync-dst-src-database-destination
type: Opaque
```

Assuming the source objects will be in Namespace source, this Secret can be added to the source cluster via:

```
$ kubectl -n source create -f secret.yaml
secret/volsync-rsync-dst-src-database-destination created
```

This Secret should then be referenced when creating the corresponding ReplicationSource. For example:

Listing 18: ReplicationSource showing reference to SSH key Secret

```
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: database-source
  namespace: source
spec:
  sourcePVC: mysql-pv-claim
  trigger:
    schedule: "*/10 * * * *"
  rsync:
    sshKeys: volsync-rsync-dest-src-database-destination
    address: my.host.com
    copyMethod: Clone
```

## Choosing between Service types (ClusterIP vs LoadBalancer)

When using Rsync-based replication, the ReplicationSource needs to be able to make a network connection to the ReplicationDestination. This requires network connectivity from the source to the destination cluster.

When a ReplicationDestination object is created, VolSync creates a corresponding Service object to serve as the network endpoint. The type of Service (LoadBalancer or ClusterIP) should be specified in the ReplicationDestination's `spec.rsync.serviceType` field.

Listing 19: ReplicationDestination with service type highlighted

```
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: database-destination
  namespace: dest
spec:
```

(continues on next page)

```

rsync:
  accessModes:
  - ReadWriteOnce
  capacity: 2Gi
  copyMethod: Snapshot
  serviceType: ClusterIP

```

The clusters' networking configuration between the two clusters affects the proper choice of Service type.

If `ClusterIP` is specified, the Service will receive an IP address allocated from the “cluster network” address pool. By default, this collection of addresses are not accessible from outside the cluster, making it a poor choice for cross-cluster replication. However, various networking addons such as `Submariner` bridge the cluster networks, making this a good option.

If `LoadBalancer` is specified, an externally accessible IP address will be allocated. This requires cluster support for load balancers such as those provided by the various cloud providers or `MetalLB` in the case of physical clusters. While this is the easiest method for allocating an accessible address in cloud environments, load balancers tend to incur additional costs and be limited in number.

To summarize the above trade-offs, when running on one of the public clouds, using a `LoadBalancer` is a quick way to get started and will work for replicating small numbers of volumes. If replicating a large number of volumes, an overlay network solution such as `Submariner` in combination with `ClusterIP` addresses will likely be more scalable.

## 2.9 Rsync-TLS-based replication

### 2.9.1 Migrate MySQL w/ TLS-based rsync

#### Contents

##### Migration of MySQL DB

- *Environment*
- *Deploy MySQL*
- *Create a destination Namespace*
- *Create a key to secure the replication*
- *Create the ReplicationDestination*
- *Create the ReplicationSource*
- *Log in to the database*
- *Add a new database*
- *Wait for the changes to replicate*
- *Pause replication*
- *Determine the latest image*
- *Restore the Snapshot*
- *Start the database on the destination*
- *Verify the restored contents*

This tutorial will show how to migrate a MySQL database using VolSync's `rsync-tls` data mover.

## Environment

This example will walk through deploying, setting up replication, then migrating MySQL between two OpenShift clusters in AWS.

Prerequisites:

- Access to two OpenShift clusters (east2 and west2). Optional: just use different Namespaces in the same cluster
- `kubectl` access to the cluster(s).
- VolSync is installed in both clusters
- Working installation of Helm
- A CSI-based StorageClass for the database's persistent data.
- The persistent storage used for the database will come from EBS, using the `ebs-csi` driver:

```
$ kubectl --context east2 get storageclass/gp3-csi -oyaml
allowVolumeExpansion: true
apiVersion: storage.k8s.io/v1
kind: StorageClass
metadata:
  annotations:
    storageclass.kubernetes.io/is-default-class: "true"
  creationTimestamp: "2022-12-01T13:18:24Z"
  name: gp3-csi
  resourceVersion: "5233"
  uid: b7a8872e-f356-4498-8324-7d11061bc043
parameters:
  encrypted: "true"
  type: gp3
provisioner: ebs.csi.aws.com
reclaimPolicy: Delete
volumeBindingMode: WaitForFirstConsumer
```

## Deploy MySQL

The Bitnami Helm chart for MySQL will be used to deploy the database. Start by adding the Bitnami Helm repo:

```
$ helm repo add bitnami https://charts.bitnami.com/bitnami
helm repo add bitnami https://charts.bitnami.com/bitnami
```

Then install the `mysql` chart into the `mysql` namespace:

```
$ helm install --kube-context east2 --create-namespace --namespace mysql \
  --set auth.rootPassword=myspassword \
  --set primary.podSecurityContext.enabled=false \
  --set primary.containerSecurityContext.enabled=false \
  --set primary.persistence.storageClass=gp3-csi \
  mysql bitnami/mysql
NAME: mysql
LAST DEPLOYED: Thu Dec  1 11:46:59 2022
NAMESPACE: mysql
```

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```

STATUS: deployed
REVISION: 1
TEST SUITE: None
NOTES:
CHART NAME: mysql
CHART VERSION: 9.4.4
APP VERSION: 8.0.31

** Please be patient while the chart is being deployed **

Tip:

  Watch the deployment status using the command: kubectl get pods -w --namespace mysql

Services:

  echo Primary: mysql.mysql.svc.cluster.local:3306

Execute the following to get the administrator credentials:

  echo Username: root
  MYSQL_ROOT_PASSWORD=$(kubectl get secret --namespace mysql mysql -o jsonpath="{.data.mysql-root-password}" | base64 -d)

To connect to your database:

  1. Run a pod that you can use as a client:

      kubectl run mysql-client --rm --tty -i --restart='Never' --image docker.io/bitnami/mysql:8.0.31-debian-11-r10 --namespace mysql --env MYSQL_ROOT_PASSWORD=$MYSQL_ROOT_PASSWORD --command -- bash

  2. To connect to primary service (read/write):

      mysql -h mysql.mysql.svc.cluster.local -uroot -p"$MYSQL_ROOT_PASSWORD"
    
```

Ensure that the database has successfully deployed:

```

$ kubectl --context east2 -n mysql get all,pvc
NAME          READY   STATUS    RESTARTS   AGE
pod/mysql-0   1/1    Running   0           3m32s

NAME          TYPE          CLUSTER-IP   EXTERNAL-IP   PORT(S)    AGE
service/mysql      ClusterIP    172.30.81.8  <none>        3306/TCP   3m32s
service/mysql-headless ClusterIP    None         <none>        3306/TCP   3m32s

NAME          READY   AGE
statefulset.apps/mysql  1/1    3m32s

NAME          STATUS   VOLUME
CAPACITY     ACCESS MODES  STORAGECLASS  AGE
persistentvolumeclaim/data-mysql-0  Bound    pvc-e90001a9-8493-45cc-87af-f9b4aefa790d
    
```

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```
→8Gi      RWO      gp3-csi      3m32s
```

## Create a destination Namespace

Create a corresponding Namespace on the destination (west2) cluster:

```
$ kubectl --context west2 create ns mysql
namespace/mysql created
```

## Create a key to secure the replication

Generate a shared key for the replication relationship:

```
$ KEY=1:$(openssl rand -hex 32)
```

Add it as a Secret in the mysql Namespace on both clusters:

```
$ kubectl --context east2 -n mysql create secret generic east-west --from-literal psk.
→txt=$KEY
secret/east-west created
$ kubectl --context west2 -n mysql create secret generic east-west --from-literal psk.
→txt=$KEY
secret/east-west created
```

## Create the ReplicationDestination

This step creates the ReplicationDestination on the west cluster. Since there is no network tunnel between the clusters, you will use a LoadBalancer Service so that the source (east) cluster will be able to connect. You will use a volume size that matches the source (8Gi).

```
$ kubectl --context west2 -n mysql create -f - <<EOF
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: mysql
spec:
  rsyncTLS:
    copyMethod: Snapshot
    capacity: 8Gi
    accessModes: ["ReadWriteOnce"]
    storageClassName: gp3-csi
    volumeSnapshotClassName: csi-aws-vsc
    keySecret: east-west
    serviceType: LoadBalancer
EOF
replicationdestination.volsync.backube/mysql created
```

Verify that the destination has been properly created by looking at the new ReplicationDestination object:

```

$ kubectl --context west2 -n mysql get replicationdestination/mysql -oyaml
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  creationTimestamp: "2022-12-06T13:31:38Z"
  generation: 1
  name: mysql
  namespace: mysql
  resourceVersion: "302334"
  uid: f3149aee-c399-462b-ac92-63ff756f4da8
spec:
  rsyncTLS:
    accessModes:
      - ReadWriteOnce
    capacity: 8Gi
    copyMethod: Snapshot
    keySecret: east-west
    serviceType: LoadBalancer
    storageClassName: gp3-csi
    volumeSnapshotClassName: csi-aws-vsc
status:
  conditions:
    - lastTransitionTime: "2022-12-06T13:31:38Z"
      message: Synchronization in-progress
      reason: SyncInProgress
      status: "True"
      type: Synchronizing
  lastSyncStartTime: "2022-12-06T13:31:38Z"
  rsyncTLS:
    address: abad73aa2ca4441ed8c9e13f1095c453-95258c1d3ff95327.elb.us-west-2.amazonaws.
↪com

```

Above, the `.status.conditions.Synchronizing` status is `True`, and the external address is available in `.status.rsyncTLS.address`. This is the address you will use to configure the source. It may take a few minutes for the `LoadBalancer` address to be assigned and appear in the status.

## Create the ReplicationSource

On the east cluster, you will create the corresponding `ReplicationSource`. Since the EBS CSI driver does not support volume cloning, you will need to specify a `copyMethod` of `Snapshot`.

Create the source:

```

$ kubectl --context east2 -n mysql create -f - <<EOF
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: mysql
spec:
  sourcePVC: data-mysql-0
  trigger:
    schedule: "*/5 * * * *"
  rsyncTLS:

```

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```

keySecret: east-west
address: abad73aa2ca4441ed8c9e13f1095c453-95258c1d3ff95327.elb.us-west-2.amazonaws.
↪COM
copyMethod: Snapshot
volumeSnapshotClassName: csi-aws-vsc
EOF
replicationsource.volsync.backube/mysql created

```

Verify that the source has been created:

```

$ kubectl --context east2 -n mysql get replicationsource/mysql -oyaml
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  creationTimestamp: "2022-12-06T13:33:51Z"
  generation: 1
  name: mysql
  namespace: mysql
  resourceVersion: "438380"
  uid: 5721c629-a1d9-447e-a009-92d752344b3f
spec:
  rsyncTLS:
    address: abad73aa2ca4441ed8c9e13f1095c453-95258c1d3ff95327.elb.us-west-2.amazonaws.
  ↪COM
    copyMethod: Snapshot
    keySecret: east-west
    volumeSnapshotClassName: csi-aws-vsc
  sourcePVC: data-mysql-0
  trigger:
    schedule: '*/* * * * *'
status:
  conditions:
  - lastTransitionTime: "2022-12-06T13:50:21Z"
    message: Waiting for next scheduled synchronization
    reason: WaitingForSchedule
    status: "False"
    type: Synchronizing
  lastSyncDuration: 21.447114717s
  lastSyncTime: "2022-12-06T13:50:21Z"
  nextSyncTime: "2022-12-06T13:55:00Z"
  rsyncTLS: {}

```

Above, you can see that synchronization has completed (`lastSyncTime` is set), and the replication took 21 seconds (`lastSyncDuration`).

Next, you will log into the database and make changes.

## Log in to the database

Exec into the pod, using the password set during deployment (mypassword):

```
$ kubectl --context east2 -n mysql exec -it sts/mysql -- mysql -u root -p
Enter password:
Welcome to the MySQL monitor.  Commands end with ; or \g.
Your MySQL connection id is 660
Server version: 8.0.31 Source distribution

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owners.

Type 'help;' or '\h' for help. Type '\c' to clear the current input statement.

mysql>
```

## Add a new database

List the current databases with the `show` command:

```
mysql> show databases;
+-----+
| Database          |
+-----+
| information_schema |
| my_database       |
| mysql             |
| performance_schema |
| sys               |
+-----+
5 rows in set (0.00 sec)
```

Use the `create` command to add a new database, then log out:

```
mysql> create database newdb;
Query OK, 1 row affected (0.00 sec)

mysql> show databases;
+-----+
| Database          |
+-----+
| information_schema |
| my_database       |
| mysql             |
| newdb             |
| performance_schema |
| sys               |
+-----+
6 rows in set (0.00 sec)
```

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```
mysql> quit;
Bye
```

### Wait for the changes to replicate

The system is configured to replicate every 5 minutes, so check the current time, then wait for the next synchronization interval to run:

```
$ date
Tue Dec  6 08:59:08 AM EST 2022

$ kubectl --context east2 -n mysql get replicationsource/mysql -oyaml
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  creationTimestamp: "2022-12-06T13:33:51Z"
  generation: 1
  name: mysql
  namespace: mysql
  resourceVersion: "442579"
  uid: 5721c629-a1d9-447e-a009-92d752344b3f
spec:
  rsyncTLS:
    address: abad73aa2ca4441ed8c9e13f1095c453-95258c1d3ff95327.elb.us-west-2.amazonaws.com
  copyMethod: Snapshot
  keySecret: east-west
  volumeSnapshotClassName: csi-aws-vsc
  sourcePVC: data-mysql-0
  trigger:
    schedule: '*/5 * * * *'
status:
  conditions:
  - lastTransitionTime: "2022-12-06T14:00:22Z"
    message: Waiting for next scheduled synchronization
    reason: WaitingForSchedule
    status: "False"
    type: Synchronizing
  lastSyncDuration: 22.094321374s
  lastSyncTime: "2022-12-06T14:00:22Z"
  nextSyncTime: "2022-12-06T14:05:00Z"
  rsyncTLS: {}
```

Above, you can see that the lastSyncTime is after the time when the database changes were made, so these changes should now be available on the destination.

The replicated data is now held in a VolumeSnapshot on the destination (west cluster). This needs to be converted to a PVC for use by the database.

## Pause replication

To make it easier to restore the latest replicated image, you should pause replication on the destination cluster.

Add `paused: True` to the `ReplicationDestination`'s `.spec` using `kubectl edit`:

```
$ kubectl --context west2 -n mysql edit replicationdestination/mysql
# ... add "paused: True", and save
replicationdestination.volsync.backube/mysql edited
```

## Determine the latest image

Determine the name of the snapshot that holds the most recent copy of replicated data:

```
$ kubectl --context west2 -n mysql get replicationdestination/mysql -oyaml
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  creationTimestamp: "2022-12-06T13:31:38Z"
  generation: 2
  name: mysql
  namespace: mysql
  resourceVersion: "321738"
  uid: f3149aee-c399-462b-ac92-63ff756f4da8
spec:
  paused: true
  rsyncTLS:
    accessModes:
      - ReadWriteOnce
    capacity: 8Gi
    copyMethod: Snapshot
    keySecret: east-west
    serviceType: LoadBalancer
    storageClassName: gp3-csi
    volumeSnapshotClassName: csi-aws-vsc
status:
  conditions:
    - lastTransitionTime: "2022-12-06T14:15:21Z"
      message: Synchronization in-progress
      reason: SyncInProgress
      status: "True"
      type: Synchronizing
  lastSyncDuration: 5m5.367038355s
  lastSyncStartTime: "2022-12-06T14:15:21Z"
  lastSyncTime: "2022-12-06T14:15:21Z"
  latestImage:
    apiGroup: snapshot.storage.k8s.io
    kind: VolumeSnapshot
    name: volsync-mysql-dst-20221206141521
  rsyncTLS:
    address: abad73aa2ca4441ed8c9e13f1095c453-95258c1d3ff95327.elb.us-west-2.amazonaws.com
```

Above, you can see that the latest Snapshot is `volsync-mysql-dst-20221206141521`.

## Restore the Snapshot

Create a new PVC, using the latestImage from the ReplicationDestination:

```
$ kubectl --context west2 -n mysql create -f - <<EOF
apiVersion: v1
kind: PersistentVolumeClaim
metadata:
  name: restored
spec:
  accessModes: [ReadWriteOnce]
  resources:
    requests:
      storage: 8Gi
  storageClassName: gp3-csi
  dataSource:
    apiGroup: snapshot.storage.k8s.io
    kind: VolumeSnapshot
    name: volsync-mysql-dst-20221206141521
EOF
persistentvolumeclaim/restored created
```

The PVC is now waiting for a Pod to attempt to use the data:

```
$ kubectl --context west2 -n mysql describe pvc/restored
Name:          restored
Namespace:     mysql
StorageClass:  gp3-csi
Status:        Pending
Volume:
Labels:        <none>
Annotations:   <none>
Finalizers:    [kubernetes.io/pvc-protection]
Capacity:
Access Modes:
VolumeMode:    Filesystem
DataSource:
  APIGroup:    snapshot.storage.k8s.io
  Kind:        VolumeSnapshot
  Name:        volsync-mysql-dst-20221206141521
Used By:       <none>
Events:
  Type      Reason              Age           From                    Message
  ----      -
  Normal    WaitForFirstConsumer 6s (x2 over 20s) persistentvolume-controller waiting_
↪ for first consumer to be created before binding
```

## Start the database on the destination

Deploy the MySQL Helm chart on the destination, but instead of provisioning a new PVC for the database, you will use the one you have just restored.

```
helm install --kube-context west2 --namespace mysql \  
  --set auth.rootPassword=mypassword \  
  --set primary.podSecurityContext.enabled=false \  
  --set primary.containerSecurityContext.enabled=false \  
  --set primary.persistence.existingClaim=restored \  
  mysql bitnami/mysql  
NAME: mysql  
LAST DEPLOYED: Tue Dec 6 09:26:39 2022  
NAMESPACE: mysql  
STATUS: deployed  
REVISION: 1  
TEST SUITE: None  
NOTES:  
CHART NAME: mysql  
CHART VERSION: 9.4.4  
APP VERSION: 8.0.31  
  
** Please be patient while the chart is being deployed **  
  
Tip:  
  
  Watch the deployment status using the command: kubectl get pods -w --namespace mysql  
  
Services:  
  
  echo Primary: mysql.mysql.svc.cluster.local:3306  
  
Execute the following to get the administrator credentials:  
  
  echo Username: root  
  MYSQL_ROOT_PASSWORD=$(kubectl get secret --namespace mysql mysql -o jsonpath="{.data.  
↪mysql-root-password}" | base64 -d)  
  
To connect to your database:  
  
  1. Run a pod that you can use as a client:  
  
      kubectl run mysql-client --rm --tty -i --restart='Never' --image docker.io/  
↪bitnami/mysql:8.0.31-debian-11-r10 --namespace mysql --env MYSQL_ROOT_PASSWORD=$MYSQL_  
↪ROOT_PASSWORD --command -- bash  
  
  2. To connect to primary service (read/write):  
  
      mysql -h mysql.mysql.svc.cluster.local -uroot -p"$MYSQL_ROOT_PASSWORD"
```

## Verify the restored contents

Log into the database and verify that newdb is present:

```
$ kubectl --context west2 -n mysql exec -it sts/mysql -- mysql -u root -p
Enter password:
Welcome to the MySQL monitor.  Commands end with ; or \g.
Your MySQL connection id is 34
Server version: 8.0.31 Source distribution

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owners.

Type 'help;' or '\h' for help. Type '\c' to clear the current input statement.

mysql> show databases;
+-----+
| Database          |
+-----+
| information_schema|
| my_database       |
| mysql             |
| newdb             |
| performance_schema|
| sys               |
+-----+
6 rows in set (0.00 sec)

mysql> quit;
Bye
```

Congratulations, you have just migrated the database to the west cluster!

### Contents

#### Rsync-based replication

- *Destination configuration*
  - *Destination status*
  - *Additional destination options*
- *Source configuration*
  - *Source status*
  - *Additional source options*
- *Rsync-specific considerations*
  - *TLS authentication*
  - *Rsync-TLS mover permissions*
  - *Choosing between Service types (ClusterIP vs LoadBalancer)*

Rsync-based replication supports 1:1 asynchronous replication of volumes for use cases such as:

- Disaster recovery
- Mirroring to a test environment
- Sending data to a remote site for processing

With this method, VolSync synchronizes data from a `ReplicationSource` to a `ReplicationDestination` using `Rsync` across a TLS-protected tunnel, provided by `stunnel`. By using `Rsync`, the amount of data transferred during each synchronization is kept to a minimum, and the TLS connection ensures that the data transfer is both authenticated and secure.

---

Rsync-over-TLS uses a “push” model for the data replication. A schedule or other trigger is used on the source side of the relationship to trigger each replication iteration. The destination continuously waits for incoming data.

During each iteration, (optionally) a point-in-time (PiT) copy of the source volume is created and used as the source data. The VolSync Rsync data mover then connects to the destination using `stunnel` (*exposed via a Service*) and sends any updates. At the conclusion of the transfer, the destination (optionally) creates a `VolumeSnapshot` to preserve the updated data.

VolSync is configured via two CustomResources (CRs), one on the source side and one on the destination side of the replication relationship.

### 2.9.2 Destination configuration

Start by configuring the destination; an example is shown below:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: my-dest
  namespace: myns
spec:
  rsyncTLS:
    copyMethod: Snapshot
    capacity: 10Gi
    accessModes: ["ReadWriteOnce"]
    storageClassName: my-sc
    volumeSnapshotClassName: my-vsc
```

In the above example, a 10 GiB RWO volume will be provisioned using the `StorageClass` `my-sc` to serve as the destination for replicated data. This volume is used by the `rsync` data mover to receive the incoming data transfers.

Since the `copyMethod` specified above is `Snapshot`, a `VolumeSnapshot` will be created, using the `VolumeSnapshotClass` named `my-vsc`, at the end of each synchronization interval. It is this snapshot that would be used to gain access to the replicated data. The name of the current `VolumeSnapshot` holding the latest synced data will be placed in the `ReplicationDestination`'s `.status.latestImage`.

## Destination status

VolSync provides status information on the state of the replication via the `.status` field in the `ReplicationDestination` object:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: my-dest
  namespace: myns
spec:
  rsyncTLS:
    # ... omitted ...
status:
status:
  conditions:
  - lastTransitionTime: "2022-11-29T13:27:54Z"
    message: Synchronization in-progress
    reason: SyncInProgress
    status: "True"
    type: Synchronizing
  lastSyncStartTime: "2022-11-29T13:27:54Z"
  rsyncTLS:
    address: 10.96.231.114
    keySecret: volsync-rsync-tls-my-dest
```

In the above example,

- The destination is waiting for data (The Synchronizing condition is True)
- The destination TLS endpoint is available at the IP specified in `.status.rsyncTLS.address`. This should be used when configuring the corresponding `ReplicationSource`.
- The TLS key is available in the Secret `.status.rsyncTLS.keySecret`. This Secret will need to be copied to the source so that it can authenticate.

After at least one synchronization has taken place, the following will also be available:

- `lastSyncTime` contains the time of the last successful data synchronization.
- `latestImage` references the object with the most recent copy of the data. If the `copyMethod` is `Snapshot`, this will be a `VolumeSnapshot` object. If the `copyMethod` is `Direct`, this will be the PVC that is used as the destination by VolSync.

## Additional destination options

There are a number of more advanced configuration parameters that are supported for configuring the destination. All of the following options would be placed within the `.spec.rsyncTLS` portion of the `ReplicationDestination` Custom-Resource.

### accessModes

When VolSync creates the destination volume, this specifies the accessModes for the PVC. The value should be `ReadWriteOnce` or `ReadWriteMany`.

### capacity

When VolSync creates the destination volume, this value is used to determine its size. This need not match the

size of the source volume, but it must be large enough to hold the incoming data.

### copyMethod

This specifies how the data should be preserved at the end of each synchronization iteration. Valid values are:

- **Direct** - Do not create a point-in-time copy of the data.
- **Snapshot** - Create a VolumeSnapshot at the end of each iteration

### destinationPVC

Instead of having VolSync automatically provision the destination volume (using capacity, accessModes, etc.), the name of a pre-existing PVC may be specified here.

### storageClassName

When VolSync creates the destination volume, this specifies the name of the StorageClass to use. If omitted, the system default StorageClass will be used.

### volumeSnapshotClassName

When using a copyMethod of Snapshot, this value specifies the name of the VolumeSnapshotClass to use when creating a snapshot. If omitted, the system default VolumeSnapshotClass will be used.

### keySecret

This is the name of a Secret that contains the TLS-PSK key for authenticating the connection with the source. If not provided, the key will be automatically generated and placed in `.status.rsyncTLS.keySecret`.

### moverSecurityContext

This field allows specifying the [PodSecurityContext](#) that will be used by the data mover. It can be used to customize the user, fsGroup, etc.

### serviceType

VolSync creates a Service to allow the source to connect to the destination. This field determines the *type of that Service*. Allowed values are ClusterIP or LoadBalancer. The default is ClusterIP.

## 2.9.3 Source configuration

An example source configuration is shown here:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: my-source
  namespace: source
spec:
  sourcePVC: mysql-pv-claim
  trigger:
    schedule: "*/5 * * * *"
  rsyncTLS:
    keySecret: volsync-rsync-dest-src-database-destination
    address: my.host.com
    copyMethod: Clone
```

In the above example, the PVC named `mysql-pv-claim` will be replicated every 5 minutes using the rsync-TLS replication method. At the start of each iteration, a clone of the source PVC will be created to generate a point-in-time copy for the iteration. The source will then use the TLS key in the named Secret (`.spec.rsyncTLS.keySecret`) to authenticate to the destination. The connection will be made to the address specified in `.spec.rsyncTLS.address`.

The synchronization schedule, `.spec.trigger.schedule`, is defined by a `cronspec`, making the schedule very flexible. Both intervals (shown above) as well as specific times and/or days can be specified.

When configuring the source, the user must manually create the Secret referenced in `.spec.rsyncTLS.keySecret` by copying the contents from the Secret generated previously on the destination.

Additionally, this ReplicationSource specifies a `copyMethod` of `Clone` which will directly generate a point-in-time copy of the source volume. However, not all CSI drivers support volume cloning (most notably the `ebs-csi` driver). In such cases, the `copyMethod: Snapshot` can be used to indirectly create a copy of the volume by first taking a snapshot, then restoring it. In this case, the user should also provide the `volumeSnapshotClassName: <vsc-name>` option to indicate which VolumeSnapshotClass VolSync should use when creating the temporary snapshot.

## Source status

The state of the replication from the source's point of view is available in the `.status` field of the ReplicationSource:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: mySource
  namespace: source
spec:
  sourcePVC: mysql-pv-claim
  trigger:
    schedule: "*/5 * * * *"
  rsync:
    # ... omitted ...
status:
status:
  conditions:
  - lastTransitionTime: "2022-11-29T17:25:13Z"
    message: Waiting for next scheduled synchronization
    reason: WaitingForSchedule
    status: "False"
    type: Synchronizing
  lastSyncDuration: 28.818695981s
  lastSyncTime: "2022-11-29T17:25:28Z"
  nextSyncTime: "2022-11-29T17:30:00Z"
  rsyncTLS: {}
```

In the above example,

- The last synchronization was completed at `.status.lastSyncTime` and took `.status.lastSyncDuration` seconds.
- The next scheduled synchronization is at `.status.nextSyncTime`.

---

**Note:** The length of time required to synchronize the data is determined by the rate of change for data in the volume and the bandwidth between the source and destination. In order to avoid missed intervals, ensure there is sufficient bandwidth between the source and destination such that `lastSyncDuration` remains safely below the synchronization interval (`.spec.trigger.schedule`).

---

### Additional source options

There are a number of more advanced configuration parameters that are supported for configuring the source. All of the following options would be placed within the `.spec.rsync` portion of the `ReplicationSource` CustomResource.

#### **accessModes**

When using a `copyMethod` of `Clone` or `Snapshot`, this field allows overriding the access modes for the point-in-time (PiT) volume. The default is to use the access modes from the source PVC.

#### **capacity**

When using a `copyMethod` of `Clone` or `Snapshot`, this allows overriding the capacity of the PiT volume. The default is to use the capacity of the source volume.

#### **copyMethod**

This specifies the method used to create a PiT copy of the source volume. Valid values are:

- **Clone** - Create a new volume by cloning the source PVC (i.e., use the source PVC as the volumeSource for the new volume).
- **Direct** - Do not create a PiT copy. The VolSync data mover will directly use the source PVC.
- **Snapshot** - Create a `VolumeSnapshot` of the source PVC, then use that snapshot to create the new volume. This option should be used for CSI drivers that support snapshots but not cloning.

#### **storageClassName**

This specifies the name of the `StorageClass` to use when creating the PiT volume. The default is to use the same `StorageClass` as the source volume.

#### **volumeSnapshotClassName**

When using a `copyMethod` of `Snapshot`, this specifies the name of the `VolumeSnapshotClass` to use. If not specified, the cluster default will be used.

#### **address**

This specifies the address of the replication destination's ssh server. It can be taken directly from the `ReplicationDestination`'s `.status.rsync.address` field.

#### **keySecret**

This is the name of a `Secret` that contains the TLS-PSK key for authenticating the connection with the source. If not provided, the key will be automatically generated and placed in `.status.rsyncTLS.keySecret`.

#### **moverSecurityContext**

This field allows specifying the `PodSecurityContext` that will be used by the data mover. It can be used to customize the user, `fsGroup`, etc.

## 2.9.4 Rsync-specific considerations

This section explains some additional considerations when setting up rsync-TLS-based replication.

## TLS authentication

The TLS connection provided by stunnel is secured using TLS-PSK. This means that the `ReplicationSource` and `ReplicationDestination` need to have access to a shared key. The `keySecret` field in the `CustomResources` determine the location of the key. If the name of a Secret is not provided in `.spec.rsyncTLS.keySecret`, it will be automatically generated and the name of the Secret placed into the `.status.rsyncTLS.keySecret`.

This optional generation means that the key can either be automatically generated, then copied to the other side or it can be pre-generated and supplied to both sides when the replication is configured. The pre-generation approach would be more suitable for gitops-type workflows.

The Secret itself contains a single field, named `psk.txt`. This field follows the [format expected by stunnel](#):

```
<id>:<at least 32 hex digits>
```

For example:

```
1:23b7395fafc3e842bd8ac0fe142e6ad1
```

The corresponding Secret would be:

Listing 20: Example `secret.yaml`

```
apiVersion: v1
data:
  # echo -n 1:23b7395fafc3e842bd8ac0fe142e6ad1 | base64
  psk.txt: MToyM2I3Mzk1ZmFmYzNlODQyYmQ4YWwZmUxNDJlNmFkMQ==
kind: Secret
metadata:
  name: tls-key-secret
type: Opaque
```

## Rsync-TLS mover permissions

Due to limitations of rsync, when run in the normal, unprivileged mode, the data mover Pod must run with a non-zero UID. This may require specifying a Pod Security Context in the `ReplicationSource` and `ReplicationDestination` objects to explicitly set the UID for the mover. Please see the documentation on the [mover permission model](#) for more details.

## Choosing between Service types (ClusterIP vs LoadBalancer)

When using Rsync-TLS-based replication, the `ReplicationSource` needs to be able to make a network connection to the `ReplicationDestination`. This requires network connectivity from the source to the destination cluster.

When a `ReplicationDestination` object is created, VolSync creates a corresponding `Service` object to serve as the network endpoint. The type of `Service` (`LoadBalancer` or `ClusterIP`) should be specified in the `ReplicationDestination`'s `.spec.rsync.serviceType` field.

Listing 21: `ReplicationDestination` with service type highlighted

```
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: database-destination
  namespace: dest
spec:
```

(continues on next page)

```
rsyncTLS:
  accessModes:
  - ReadWriteOnce
  capacity: 2Gi
  copyMethod: Snapshot
  serviceType: ClusterIP
```

The clusters' networking configuration between the two clusters affects the proper choice of Service type.

If `ClusterIP` is specified, the Service will receive an IP address allocated from the “cluster network” address pool. By default, this collection of addresses are not accessible from outside the cluster, making it a poor choice for cross-cluster replication. However, various networking addons such as `Submariner` bridge the cluster networks, making this a good option.

If `LoadBalancer` is specified, an externally accessible IP address will be allocated. This requires cluster support for load balancers such as those provided by the various cloud providers or `MetalLB` in the case of physical clusters. While this is the easiest method for allocating an accessible address in cloud environments, load balancers tend to incur additional costs and be limited in number.

To summarize the above trade-offs, when running on one of the public clouds, using a `LoadBalancer` is a quick way to get started and will work for replicating small numbers of volumes. If replicating a large number of volumes, an overlay network solution such as `Submariner` in combination with `ClusterIP` addresses will likely be more scalable.

## 2.10 Syncthing-based replication

### 2.10.1 Syncthing Dokuwiki Example

**Note:** This tutorial requires the usage of `LoadBalancer` to expose applications from within the cluster. If you are running a `KIND` cluster, please follow this guide to install `metallb` if you haven't already: <https://kind.sigs.k8s.io/docs/user/loadbalancer/>

In this example, we will demonstrate how Syncthing can be used to maintain a synchronized volume across several Dokuwiki application instances.

First, create a namespace for the Dokuwiki application and launch the required resources:

```
kubect1 create ns dokuwiki-east
kubect1 apply -f examples/dokuwiki/ -n dokuwiki-east
```

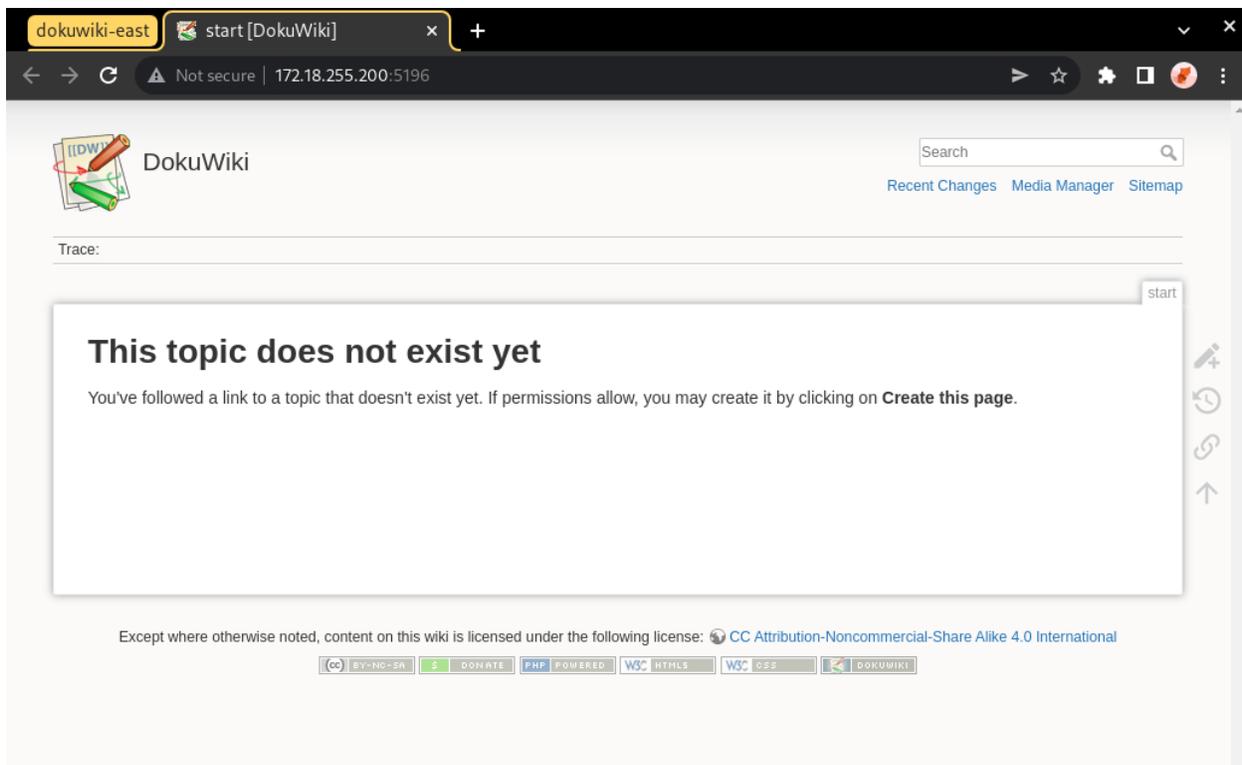
Ensure that we can access the dokuwiki application by obtaining the external IP address:

```
$ kubect1 get service -n dokuwiki-east dokuwiki-service
```

NAME	TYPE	CLUSTER-IP	EXTERNAL-IP	PORT(S)	AGE
dokuwiki-service	LoadBalancer	10.96.231.229	172.18.255.200	5196:30113/TCP	16m

Open your browser and navigate to the value in your `EXTERNAL-IP` field, in our case it is `172.18.255.200:5196`. This should take you to the front-end for the Dokuwiki application. You'll be able to create new wiki pages here, as well as edit existing ones.

Once opened, you should see a page like this:



Now let's populate our DokuWiki with its first page, and what better subject to talk about than the Syncthing data mover?

Create a new page on the DokuWiki website with the following contents:

```
Syncthing is a data mover that allows you to synchronize your data across multiple
→ devices.
It's an awesome tool that you should try out if you haven't already.
```

Now let's create a Syncthing-based ReplicationSource to synchronize the data within our DokuWiki PVC:

```
$ kubectl apply -f examples/syncthing/replicationsource_empty.yaml -n dokuwiki-east
replicationsource.volsync.backube/sync-dokuwiki created
```

Let's retrieve our ReplicationSource's Syncthing information once it becomes available:

```
$ kubectl get replicationsource -n dokuwiki-east sync-dokuwiki \
-o jsonpath='{.status.syncthing}' -w
{"ID": "TMBYRB4-EIINYAW-ZFBX4LV-7FE37NT-BLQPSKB-P2BFIPW-QW6ST3C-PSU7UQD", "address": "tcp://
→ 10.96.217.239:22000"}
```

Once the above data becomes available, let's save the Syncthing ID and address as an environment variable in our shell so that we can reuse it later.

```
export SYNCTHING_EAST_ID=$(kubectl get replicationsource -n dokuwiki-east sync-dokuwiki -
→ o jsonpath='{.status.syncthing.ID}')
export SYNCTHING_EAST_ADDRESS=$(kubectl get replicationsource -n dokuwiki-east sync-
→ dokuwiki -o jsonpath='{.status.syncthing.address}')
```

Now that `dokuwiki-east` is all configured, let's create two other namespaces with their own DokuWiki applications: `dokuwiki-west` and `dokuwiki-central`.

```
kubectl create ns dokuwiki-west
kubectl create ns dokuwiki-central
```

We'll launch a DokuWiki application in each namespace:

```
kubectl apply -f examples/dokuwiki/ -n dokuwiki-west
kubectl apply -f examples/dokuwiki/ -n dokuwiki-central
```

These can now be accessed through their own respective external IP addresses:

Listing 22: Obtaining the External IP for dokuwiki-west

```
$ kubectl get service -n dokuwiki-west dokuwiki-service
NAME                TYPE           CLUSTER-IP    EXTERNAL-IP    PORT(S)          AGE
dokuwiki-service   LoadBalancer  10.96.142.135 172.18.255.202 5196:32364/TCP   114s
```

Listing 23: Obtaining the External IP for dokuwiki-central

```
$ kubectl get service -n dokuwiki-central dokuwiki-service
NAME                TYPE           CLUSTER-IP    EXTERNAL-IP    PORT(S)          AGE
dokuwiki-service   LoadBalancer  10.96.254.251 172.18.255.203 5196:31687/TCP   2m32s
```

Go ahead and open both of these up in their own respective tabs. You should see empty pages for both `dokuwiki-west` and `dokuwiki-central`.

Let's change this by creating Syncthing-based ReplicationSources in each of these namespaces, and configuring them to use `dokuwiki-east` as their introducer node.

Using the information that we obtained from the ReplicationSource in `dokuwiki-east` earlier, create a ReplicationSource with the following contents and apply it in each namespace:

Listing 24: Syncthing-based ReplicationSource using dokuwiki-east as an introducer

```
for ns in dokuwiki-west dokuwiki-central; do
cat <<EOF | kubectl apply -n "${ns}" -f -
kind: ReplicationSource
apiVersion: volsync.backube/v1alpha1
metadata:
  name: sync-dokuwiki
spec:
  sourcePVC: dokuwiki-pvc
  syncthing:
    serviceType: ClusterIP
  peers:
    - ID: ${SYNCTHING_EAST_ID}
      address: ${SYNCTHING_EAST_ADDRESS}
    introducer: true
EOF
done
```

This will create Syncthing-based ReplicationSources in both namespaces configured to sync the PVC which stores DokuWiki's data. These ReplicationSources will be configured to use `dokuwiki-east` as their introducer node.

To complete the process, we must add `dokuwiki-west` and `dokuwiki-central` as peers into the `dokuwiki-east` ReplicationSource. Since both `dokuwiki-west` and `dokuwiki-central` are now configured to use `dokuwiki-east`

as their introducer node, we will not have to do any extra work to get these two connected with each other.

First, let's save the Syncthing information of dokuwiki-west and dokuwiki-central: Wait until the Syncthing information is available in dokuwiki-west, then save it into the respective variables:

```
$ kubectl get replicationsource -n dokuwiki-west sync-dokuwiki -o jsonpath='{.status.
↪syncthing}' -w
$ export SYNCTHING_WEST_ID=$(kubectl get replicationsource -n dokuwiki-west sync-
↪dokuwiki -o jsonpath='{.status.syncthing.ID}')
$ export SYNCTHING_WEST_ADDRESS=$(kubectl get replicationsource -n dokuwiki-west sync-
↪dokuwiki -o jsonpath='{.status.syncthing.address}')
```

Now repeat the same process for dokuwiki-central:

```
$ kubectl get replicationsource -n dokuwiki-central sync-dokuwiki -o jsonpath='{.status.
↪syncthing}' -w
$ export SYNCTHING_CENTRAL_ID=$(kubectl get replicationsource -n dokuwiki-central sync-
↪dokuwiki -o jsonpath='{.status.syncthing.ID}')
$ export SYNCTHING_CENTRAL_ADDRESS=$(kubectl get replicationsource -n dokuwiki-central_
↪sync-dokuwiki -o jsonpath='{.status.syncthing.address}')
```

Now that we have the Syncthing information of both namespaces, let's add them as peers to the dokuwiki-east ReplicationSource:

```
cat <<EOF | kubectl apply -n dokuwiki-east -f -
kind: ReplicationSource
apiVersion: volsync.backube/v1alpha1
metadata:
  name: sync-dokuwiki
spec:
  sourcePVC: dokuwiki-pvc
  syncthing:
    serviceType: ClusterIP
    peers:
      - ID: $SYNCTHING_CENTRAL_ID
        address: $SYNCTHING_CENTRAL_ADDRESS
        introducer: false
      - ID: $SYNCTHING_WEST_ID
        address: $SYNCTHING_WEST_ADDRESS
        introducer: false
EOF
```

Once this configures, we'll see that dokuwiki-east is now connected to both dokuwiki-west and dokuwiki-central:

Listing 25: Peers connected to dokuwiki-east

```
$ kubectl get replicationsource sync-dokuwiki -n dokuwiki-east -o jsonpath='{.status.
↪syncthing.peers}' | jq
[
  {
    "ID": "LMZRG5Y-TPMJ3EW-HJ4C7EQ-IK2JPCY-YHXDWLW-T7G3XIX-VCKB4F6-EQ5X2QI",
    "address": "tcp://10.96.246.238:22000",
    "connected": true,
    "deviceName": "volsync-sync-dokuwiki-f59cd4b9c-r6f4c"
```

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```

},
{
  "ID": "MIOOI4E-5PWWT4F-QRRRSWG-PZAXB4I-E6STCCG-25STARPP-ONTUNLN-QFVQTAE",
  "address": "tcp://10.244.0.27:22000",
  "connected": true,
  "deviceName": "volsync-sync-dokuwiki-f59cd4b9c-dhpjs"
}
]

```

We can also see that `dokuwiki-central` was introduced and connected to `dokuwiki-west` by `dokuwiki-east`:

Listing 26: Peers connected to `dokuwiki-central`

```

$ kubectl get replicationsource sync-dokuwiki -n dokuwiki-central -o jsonpath='{.status.
↪syncthing.peers}' | jq
[
  {
    "ID": "LMZRG5Y-TPMJ3EW-HJ4C7EQ-IK2JPCY-YHXDWLW-T7G3XIX-VCKB4F6-EQ5X2QI",
    "address": "tcp://10.96.246.238:22000",
    "connected": true,
    "deviceName": "volsync-sync-dokuwiki-f59cd4b9c-r6f4c",
    "introducedBy": "TMBYRB4-EIINYAW-ZFBX4LV-7FE37NT-BLQPSKB-P2BFIPW-QW6ST3C-PSU7UQD"
  },
  {
    "ID": "TMBYRB4-EIINYAW-ZFBX4LV-7FE37NT-BLQPSKB-P2BFIPW-QW6ST3C-PSU7UQD",
    "address": "tcp://10.96.217.239:22000",
    "connected": true,
    "deviceName": "volsync-sync-dokuwiki-f59cd4b9c-rhlxh"
  }
]

```

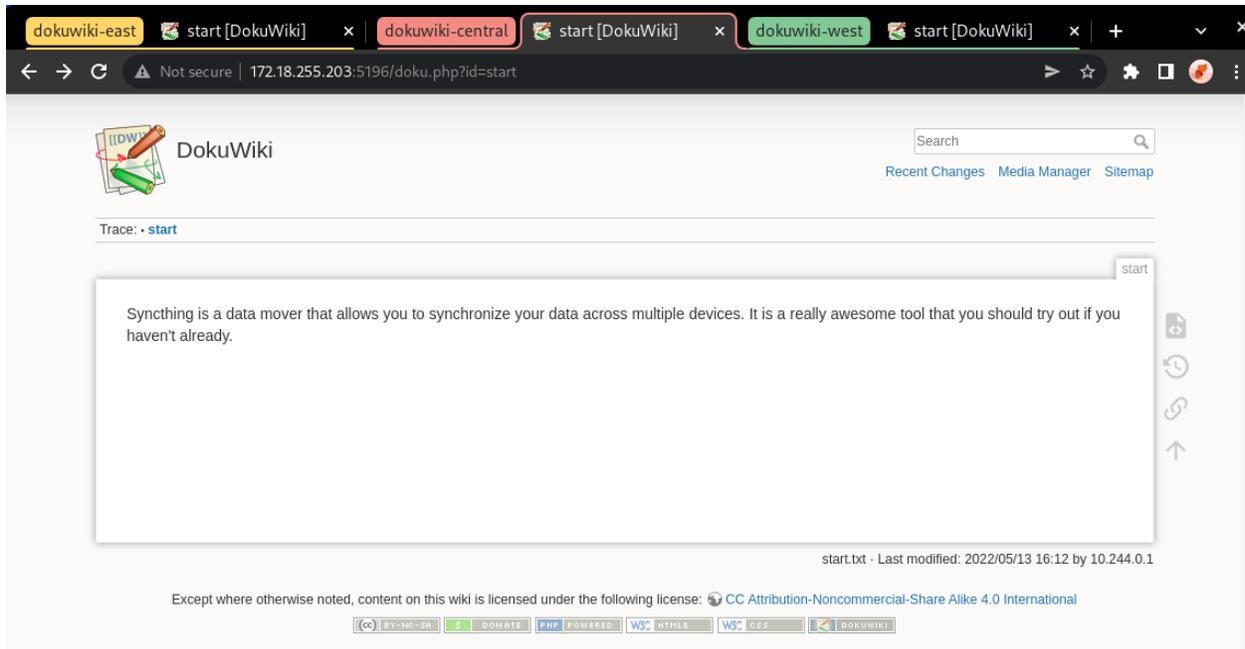
Now, let's get the external IPs to the `dokuwiki-west` and `dokuwiki-central` applications and view them in our browser:

```

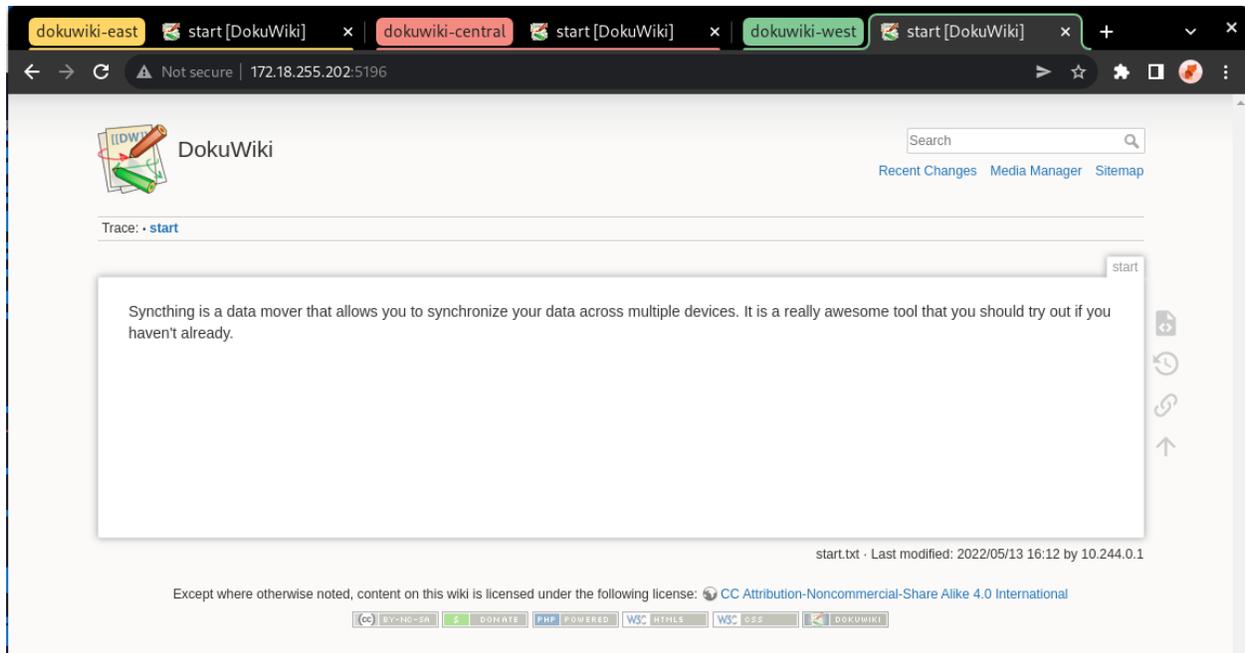
$ kubectl get svc -n dokuwiki-central dokuwiki-service
NAME                TYPE           CLUSTER-IP      EXTERNAL-IP      PORT(S)          AGE
dokuwiki-service    LoadBalancer  10.96.254.251   172.18.255.203   5196:31687/TCP   177m
$ kubectl get svc -n dokuwiki-west dokuwiki-service
NAME                TYPE           CLUSTER-IP      EXTERNAL-IP      PORT(S)          AGE
dokuwiki-service    LoadBalancer  10.96.142.135   172.18.255.202   5196:32364/TCP   177m

```

Here's how the main DokuWiki website appears in the `dokuwiki-central` namespace:



And here's how it looks in the `dokuwiki-west` namespace:

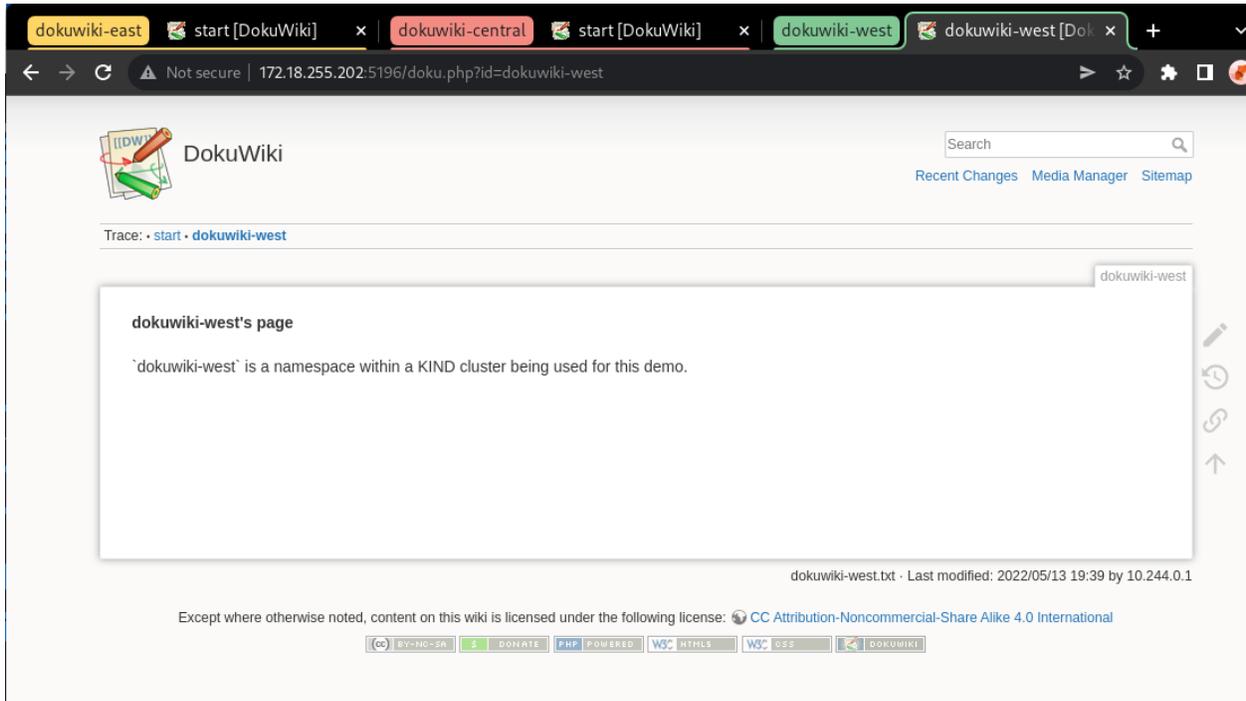


Now let's create a new page from the `dokuwiki-west` namespace, click on the URL bar at the and append /`dokuwiki-west` to the end of the URL, like this:

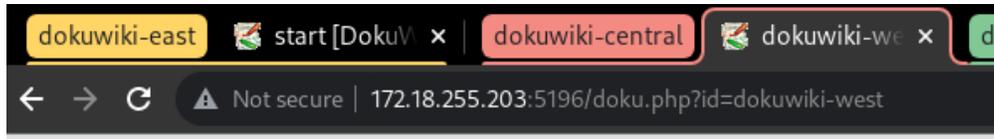
`172.18.255.202:5196/dokuwiki-west`

This should present us with a new page containing the message: “this topic does not exist yet.” Well let's change that: click on the “Create this page” button and fill it with the content of your choosing. In our case, we're going to make a page for our `dokuwiki-west` namespace.

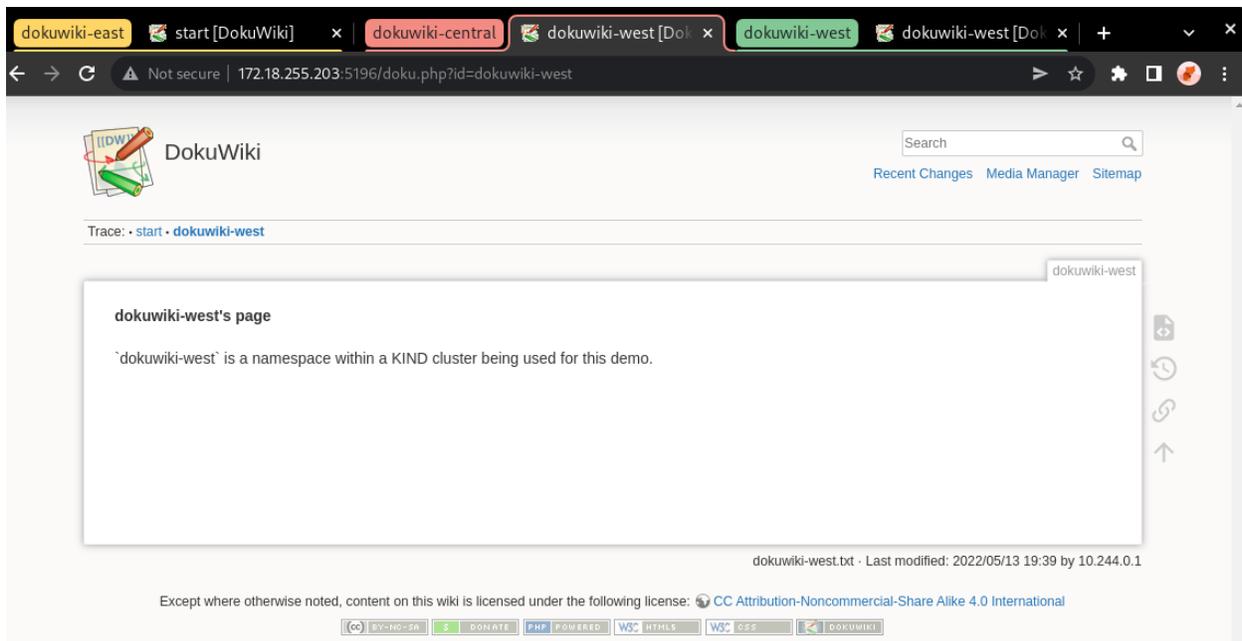
Your end result should resemble something like this:



We can verify that this page has been synced to the DokuWiki instances in other namespaces by going to the `dokuwiki-central` namespace and placing `/doku.php?id=dokuwiki-west` at the end of its URL, like this:



Once you hit Enter, you should see the page we had just created in the `dokuwiki-west` namespace appear in the `dokuwiki-central` tab:



And voila! You have just created a fully-connected Syncthing cluster in Kubernetes using VolSync, and made use of it to synchronize data across a distributed application.

## Contents

### Syncthing-based replication

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- *Communicating With Syncthing*

VolSync supports active-active synchronization of data across several PersistentVolumes using a Syncthing-based data mover. ReplicationSource objects are configured to connect to other Syncthing devices in order to sync data of a provided PVC. Any changes made to the PVC will be propagated to the rest of the peers sharing the volume.

## 2.10.2 How Synching Works In VolSync

Synching connects to a cluster of nodes sharing a synchronized volume. When one of the nodes syncing the volume modifies the data in the PV, the change will be propagated to the rest of the nodes within the Synching cluster. Synching also includes an introducer feature which allows one device to be connected to a cluster of other devices upon configuring a single introducer node. This can be used to create a hub-and-spoke model for replication, or any other kind of network.

When a ReplicationSource is created and configured to sync a PVC with other peers, all of the connected peers will maintain their own Volume containing the synced data. To detect file changes, Synching employs two methods: a filesystem watcher, which notifies Synching of any changes to the local filesystem, and a full filesystem scan which occurs routinely at a specified interval (default is an hour). Since Synching is an “always-on” synchronization system, ReplicationSources will report their synchronization status as always being ‘in-progress’.

VolSync uses a custom-built Synching mover which disables the use of relay servers and global announce, and relying instead on being provided with the addresses of other Synching peers directly.

---

**Note:** Synching is peer-to-peer technology which connects to other peers directly rather than going through intermediary servers. Because Synching lacks centralization, file conflicts are resolved by favoring the **most recent version**.

---

## 2.10.3 Configuring a ReplicationSource

Here’s an example of a Synching-based ReplicationSource.

Listing 27: ReplicationSource object configuring the peers it should connect to.

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: sync-todo-database
spec:
  sourcePVC: todo-database
  synching:
    serviceType: ClusterIP
    # List of peers that this ReplicationSource should connect to.
    peers:
      # The Synching ID of the peer.
      - ID: GVONGZX-6FVQPEY-4QWTVLK-TXNJUHA-5UGA625-UBC7HZQ-P5BG2XJ-EHJ4XQ3
        # The address of the peer - this will be used as a data connection.
        address: tcp://10.96.55.168:22000
        # Whether or not the peer should introduce this ReplicationSource to other peers.
        introducer: false
```

The above ReplicationSource tells VolSync that it should use the Synching replication method in order to sync the todo-database volume.

A service type of ClusterIP is used to expose the Synching data port, allowing us to connect with other peers within the cluster. In order for Synching to connect to peers outside of the cluster, you will need to either use serviceType: LoadBalancer, or a submariner-type cross-cluster networking configuration. A single peer is specified for VolSync to sync the todo-database volume with, however you can specify as many or as few peers as you’d like. To create a simple ReplicationSource without connecting to other peers, simply omit the peers field.

In order for two Synthing-based ReplicationSources to connect to each other, each one must specify the other one in their `peers` list.

**Note:** Synthing combines the set of files in the provided `PersistentVolume` with those from the other peers. When two files have the same name, the file with the most recent data will be favored.

## Synthing options

Here are all of the options that can be specified for the Synthing mover:

### peers

A list of the Synthing devices this ReplicationSource should sync the `sourcePVC` with. The peers being listed must also specify this ReplicationSource's Synthing details in their spec for them to successfully connect with one another. Each peer contains the following fields:

- `ID` - The peer's device ID.
- `address` - The peer's address that we will attempt to connect on. This will usually be a TCP connection.
- `introducer` - Whether this peer should act as an introducer node or not. If true, this peer will automatically connect us to other nodes that also have it set as an introducer.

### serviceType

The type of service used to expose Synthing's data connection. Defaults to `ClusterIP`. Valid values are:

- `ClusterIP` - VolSync will expose the service through a `ClusterIP`; used for in-cluster networking.
- `LoadBalancer` - The Synthing data port is exposed through a `LoadBalancer`, which is used for connecting to other Synthing instances outside of the cluster.

### configCapacity

Amount of storage to be used by the PVC storing Synthing's configuration data. The default is 1Gi when left unspecified.

### configStorageClassName

The name of the storage class to use for the PVC storing Synthing's configuration data. When unspecified, VolSync will default to the storage class being used by the source PVC.

### configVolumeAccessModes

These are used to set the `accessModes` of the config PVC. When unspecified, these default to the `accessModes` present on the source PVC.

## Source Status

Once the ReplicationSource has been deployed and Synthing has properly configured itself, it will populate the `.status.synthing` field with information about your Synthing node.

Here's an example of a ReplicationSource with a status:

Listing 28: ReplicationSource object with the Synthing ID and address highlighted.

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
  name: sync-todo-database
```

(continues on next page)

```

spec:
  sourcePVC: todo-database
metadata:
  syncthing:
    serviceType: ClusterIP
    peers:
      - ID: 7NDBKMJ-XU2GWGG-4JJ5B5M-ONSDVAK-ZDXHKVM-6X7XYB7-ZG4NYDI-ZQ6FHQ4
        address: tcp://10.96.140.222:22000
        introducer: true
status:
  conditions:
    - lastTransitionTime: "2022-04-27T20:26:23Z"
      message: Synchronization in-progress
      reason: SyncInProgress
      status: "True"
      type: Synchronizing
  lastSyncStartTime: "2022-04-27T20:25:32Z"
  syncthing:
    # This ReplicationSource's Syncthing ID.
    ID: GVONGZX-6FVQPEY-4QWTVLK-TXNJUHA-5UGA625-UBC7HZQ-P5BG2XJ-EHJ4XQ3
    # This ReplicationSource's Syncthing address.
    address: tcp://10.96.55.168:22000
    # The Syncthing peers this ReplicationSource is connected to.
    peers:
      - # The Syncthing ID of the peer we're connected to.
        ID: JDKRGMR-HOX3QQ6-N40LXBD-VRLS3D4-2DBFELP-6QKIFYB-4ZP3YSF-Q37KAQU
        # The connected peer's Syncthing address.
        address: tcp://10.96.168.12:22000
        # Whether or not we have an active connection with this peer.
        connected: true
        # The connected device's local name. Here this is another Pod's name.
        deviceName: volsync-syncthing-1-76dfbfb4d7-5fnc8
        # The Syncthing ID of the peer that introduced us to this peer
        introducedBy: 7NDBKMJ-XU2GWGG-4JJ5B5M-ONSDVAK-ZDXHKVM-6X7XYB7-ZG4NYDI-ZQ6FHQ4

```

The above status displays your Syncthing ID in `.status.syncthing.ID` and address which other peers will need to specify in order to connect to this ReplicationSource in `.status.syncthing.address`.

Additionally, it displays a list of peers that this ReplicationSource is connected to. Each peer listing contains the following fields:

**ID**

The connected peer's Syncthing device ID.

**address**

The connected peer's address.

**connected**

A boolean indicating whether or not this ReplicationSource has an active connection to the listed peer.

**deviceName**

Friendly name associated with the other device, configured once upon connection.

**introducedBy**

The Syncthing ID of the peer that introduced us to this peer. This field will only appear for peers that have been introduced to us.

## 2.10.4 Hub and Spoke Synchronization

So far we have shown you have to configure each ReplicationSource with every other peer's information. As you can probably tell, this requires more repetitive configuration as your Syncthing cluster gets larger. Luckily, there is a feature that can be used to simplify this process.

### Introducers To The Rescue

As mentioned in the previous section, VolSync provides an `introducer` setting that can be set on a peer-by-peer basis. When another peer is configured to act as an introducer, it will introduce you to other peers that it's sharing the folder with. These introductions happen automatically, and are automatically removed once the introducer is removed from the `.spec.syncthing.peers` list.

---

**Note:** Introduced peers should be left out of the `.spec.syncthing.peers` list, as it may lead to strange behavior.

---

Because VolSync disables `global announce` and `global discover` as a method of determining how to connect to other peers, introduced Syncthing nodes will only be introduced and connected if they also configured the intermediary node as an introducer. When nodes are introduced to you that did not configure the introducing node to introduce them, their device IDs will still be shared with you, but you will not be able to connect with them as their addresses are not provided.

### Configuring Introducers

For Example, suppose we have the following two ReplicationSources:

Listing 29: Two ReplicationSources configured in the hub-and-spoke pattern.

```
---
# Alice's ReplicationSource
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: alice-rs
spec:
  sourcePVC: alice-data
  syncthing:
    serviceType: ClusterIP
    peers:
      # Bob's ReplicationSource
      - ID: ZQF2PVB-UMNMXCF-HWMQ7DX-ELOWLPZ-OBNF7JM-XQSTFXE-O23GBWH-R5WPOQZ
        address: tcp://bob.address:22000
        introducer: false

# Bob's ReplicationSource
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: bob-rs
spec:
  sourcePVC: bob-data
```

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```

syncthing:
  serviceType: ClusterIP
  peers:
  # Alice's ReplicationSource
  - ID: 7NDBKMJ-XU2GWGG-4JJ5B5M-ONSDVAK-ZDXHKVM-6X7XYB7-ZG4NYDI-ZQ6FHQ4
    address: tcp://alice.address:22000
    introducer: true

```

Here, `alice-rs` is being configured by `bob-rs` to act as an introducer for any nodes that are currently connected to the shared PVC. At the moment, there are only `N=2` Syncthing nodes in the entire cluster.

## Adding More Spokes

Now, let's suppose that we want to connect Charlie to everyone in the current cluster, but without having to append his address and ID to the two other existing nodes.

In order to do this, we will need to update Alice's peers to include Charlie's Syncthing ID and address, as well as update Charlie's peers to include Alice with `introducer: true` set.

Listing 30: Alice's ReplicationSource configured with Bob and Charlie's information.

```

apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: alice-rs
spec:
  sourcePVC: alice-data
  syncthing:
    serviceType: ClusterIP
    peers:
    # Bob's ReplicationSource
    - ID: ZQF2PVB-UMNMXCF-HWMQ7DX-ELOWLPZ-OBNF7JM-XQSTFXE-O23GBWH-R5WPOQZ
      address: tcp://bob.address:22000
      introducer: false
    # Charlie ReplicationSource
    - ID: LUHH7KT-KYD47H5-NJ5LFD3-EF62KHJ-KW65NUI-5NJ6CTD-FL5IE6M-5XW7CQZ
      address: tcp://charlie.address:22000
      introducer: false

```

Listing 31: Charlie's ReplicationSource configured with Alice as a hub.

```

apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: charlie-rs
spec:
  sourcePVC: charlie-data
  syncthing:
    serviceType: ClusterIP
    peers:
    # Alice's ReplicationSource

```

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```
- ID: 7NDBKMJ-XU2GWGG-4JJ5B5M-ONSDVAK-ZDXHKVM-6X7XYB7-ZG4NYDI-ZQ6FHQ4
  address: tcp://alice.address:22000
  introducer: true
```

Once Charlie and Alice connect, Alice introduces Charlie to all of the other peers that have Alice configured as an introducer, in this case she would introduce Charlie and Bob.

Configuring nodes this way allows us to have to only perform two operations anytime that we want to introduce a new node to the rest of the cluster, rather than having to update every node in the cluster.

## Removing Spokes

In order to remove a spoke from the cluster, simply remove it from the Hub's peers list.

For example, if Alice wants to remove Charlie, all she needs to do is remove the entry corresponding to his ID, and the rest of the Syncthing cluster will automatically remove him from their connections.

Listing 32: Alice's ReplicationSource configured to remove Charlie.

```
# Alice's ReplicationSource
apiVersion: volsync.backube/v1alpha1
kind: ReplicationSource
metadata:
  name: alice-rs
spec:
  sourcePVC: alice-data
  syncthing:
    serviceType: ClusterIP
    peers:
      # bob's ReplicationSource
      - ID: ZQF2PVB-UMNMXCF-HWMQ7DX-ELOWLPZ-OBNF7JM-XQSTFXE-O23GBWH-R5WPOQZ
        address: tcp://bob.address:22000
        introducer: false
      # charlie
      #- ID: LUHH7KT-KYD47H5-NJ5LFD3-EF62KHJ-KW65NUI-5NJ6CTD-FL5IE6M-5XW7CQZ
        # address: tcp://charlie.address:22000
        # introducer: false
```

Once applied, Alice — along with all of the nodes that she had introduced to Bob — will remove Charlie from the cluster. As a result, Charlie will be disconnected from the cluster and will no longer be syncing his version of the PVC.

---

**Note:** Using introducers is purely optional, and PVCs can still be synced regardless of how the cluster graph is composed, so long that every node is connected to at least one other node in the cluster.

---

## 2.10.5 More on Introducers

Introducers are a great feature when it comes to usability, but there are some scenarios that users should generally avoid.

### Transitive configuration

For one, Synthing configures the introduced nodes automatically and uses the introducer as their controller. This means that if Alice is the introducer for Bob and Charlie and removes Bob from her list of peers, Charlie's node will automatically remove Bob as well. Since Bob was connected to Charlie through Alice, once Bob loses Alice as the introducer, he loses Charlie along with any other nodes that Alice had introduced him to.

### Cyclic introducers

Synthing introducers also contain a mechanism to automatically re-add introduced nodes if they were disconnected for whatever reason. This means that if you configure two nodes as each other's introducer, you will never be able to disconnect them as they'll continue to re-add each other until the end of time.

## 2.10.6 Communicating With Synthing

Unlike the other data movers, Synthing never stops running. This changes our approach of controlling it to having Synthing always be running, and communicating with it through its REST API.

Synthing has a REST API which handles connections through HTTPS. In order to do this securely, VolSync provisions a self-signed certificate and key for the Synthing REST API, passing the generated certificate and key to Synthing on first launch, and adding the Public Key PEM to VolSync's root CA bundle.

You can provide a custom HTTPS key/certificate pair by overriding the Secret which VolSync uses to store its communication credentials for Synthing.

An example of a Secret which overrides the default Synthing credentials is shown below, all fields must be provided:

Listing 33: Kubernetes Secret preloading custom HTTPS certificates

```
kind: Secret
apiVersion: v1
metadata:
  # this should be in the format: volsync-<REPLICATION_SOURCE_NAME>
  name: volsync-my-replication-source
type: Opaque
# all of these fields must be provided
data:
  # loaded by Synthing
  httpsKeyPEM: <your base64 encoded HTTPS private key>
  # loaded into Synthing and used by VolSync as a root CA
  httpsCertPEM: <your base64 encoded HTTPS certificate>
  # The API key used by VolSync to authenticate API requests
  apikey: <base64-encoded API Key>
  # These fields are solely for securing the Web UI from being accessed.
  username: <base64-encoded username>
  password: <base64-encoded password>
```

Once you have deployed this secret in your intended namespace, you will then need to create the ReplicationSource using the name you specified in the above Secret. For example, a custom secret named "volsync-my-replication-source" would require you to name the ReplicationSource "my-replication-source".

---

**Note:** This Secret must be created **before** creating the ReplicationSource. Otherwise, Syncing will generate its own set of credentials and ignore yours.

---

## 2.11 VolSync CLI / kubectl plugin

### 2.11.1 Migrating data into Kubernetes

```
$ kubectl volsync migration
```

```
Copy data from an external file system into a Kubernetes PersistentVolume.
```

```
This set of commands is designed to help provision a PV and copy data from a directory tree into that newly provisioned volume.
```

```
Usage:
```

```
kubectl-volsync migration [command]
```

```
Available Commands:
```

```
create      Create a new migration destination
delete      Delete a new migration destination
rsync       Rsync data from source to destination
```

#### Example Usage

##### Example steps

- *Create the migration destination*
- *Copy the data into the PVC*
- *Clean up*
- *Use the data in-cluster*

The following example uses the `kubectl volsync migration` subcommand to migrate data from a stand-alone storage system into a Kubernetes PersistentVolumeClaim.

##### External storage

A locally mounted directory tree (could be local disk or network-attached storage such as NFS or GlusterFS)

##### Destination cluster

OpenShift running on GCP with their CSI driver. Note: The VolSync operator must be installed in the destination cluster.

## Create the migration destination

Begin by creating a Namespace to hold the PVC (and eventually the application that will use the data).

```
$ kubectl create ns destination
namespace/destination created
```

Create a target for the data migration. If a capacity and accessModes are provided and the PVC does not already exist, the VolSync CLI will create the PVC. Otherwise, it will use the existing PVC.

```
$ kubectl volsync migration create -r mig-example --capacity 2Gi --accessmodes_
↳ReadWriteOnce --storageclass standard-csi --pvcname destination/mydata
I0302 12:50:42.498947 168200 request.go:665] Waited for 1.007067079s due to client-side_
↳throttling, not priority and fairness, request: GET:https://api.ci-ln-72rwmxb-72292.
↳origin-ci-int-gce.dev.rhcloud.com:6443/apis/project.openshift.io/v1?timeout=32s
I0302 12:50:43.925309 168200 migration_create.go:329] pvc: "mydata" not found, creating_
↳the same
I0302 12:50:43.974092 168200 migration_create.go:267] Namespace: "destination" is found,
↳ proceeding with the same
I0302 12:50:44.021410 168200 migration_create.go:314] Created Destination PVC: "mydata"_
↳in Namespace: "destination" and Cluster: ""
I0302 12:50:44.073745 168200 migration_create.go:357] Created ReplicationDestination:
↳"destination-mydata-migration-dest" in Namespace: "destination" and Cluster: ""

$ kubectl get -n destination pvc/mydata
NAME          STATUS    VOLUME                                     CAPACITY   ACCESS MODES   _
↳STORAGECLASS  AGE
mydata       Bound    pvc-c9040e1f-e3dd-49e4-aa5d-194079181f55  2Gi        RWO            _
↳standard-csi  3m6s
```

## Copy the data into the PVC

Once the destination has been created, we can use the CLI to transfer data into the cluster.

The data currently resides in the /tmp/data directory:

```
$ ls /tmp/data
./  ../  linux-4.1.51/

$ du -sh /tmp/data
643M    /tmp/data
```

Sync this data into the cluster:

```
$ kubectl volsync migration rsync -r mig-example --source /tmp/data/
...
Number of files: 52,680 (reg: 49,453, dir: 3,213, link: 14)
Number of created files: 52,680 (reg: 49,453, dir: 3,213, link: 14)
Number of deleted files: 0
Number of regular files transferred: 49,453
Total file size: 556.98M bytes
Total transferred file size: 556.97M bytes
Literal data: 556.97M bytes
```

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```

Matched data: 0 bytes
File list size: 524.26K
File list generation time: 0.001 seconds
File list transfer time: 0.000 seconds
Total bytes sent: 150.77M
Total bytes received: 961.29K

sent 150.77M bytes  received 961.29K bytes  10.46M bytes/sec
total size is 556.98M  speedup is 3.67

```

Incremental changes can also be transferred:

```

$ echo "hello" > /tmp/data/hi.txt

$ kubectl volsync migration rsync -r mig-example --source /tmp/data/
I0302 13:37:37.698258 174966 request.go:665] Waited for 1.004977118s due to client-side
↳ throttling, not priority and fairness, request: GET:https://api.ci-ln-72rwmxb-72292.
↳ origin-ci-int-gce.dev.rhcloud.com:6443/apis/snapshot.storage.k8s.io/v1beta1?timeout=32s
I0302 13:37:39.093025 174966 migration_rsync.go:132] Extracting ReplicationDestination
↳ secrets
I0302 13:37:39.177009 174966 migration_rsync.go:190] Migrating Data from "/tmp/data/"
↳ to "\destination\mydata"
.d..t..... ./
<f+++++++ hi.txt

Number of files: 52,681 (reg: 49,454, dir: 3,213, link: 14)
Number of created files: 1 (reg: 1)
Number of deleted files: 0
Number of regular files transferred: 1
Total file size: 556.98M bytes
Total transferred file size: 6 bytes
Literal data: 6 bytes
Matched data: 0 bytes
File list size: 0
File list generation time: 0.001 seconds
File list transfer time: 0.000 seconds
Total bytes sent: 806.41K
Total bytes received: 3.60K

sent 806.41K bytes  received 3.60K bytes  147.28K bytes/sec
total size is 556.98M  speedup is 687.61

```

### Clean up

Once all the data has been transferred, the VolSync destination objects can be cleaned up:

```
$ kubectl volsync migration delete -r mig-example
```

### Use the data in-cluster

We can now start a pod attached to the PVC and view the data:

Listing 34: pod.yaml

```
---
kind: Pod
apiVersion: v1
metadata:
  name: busybox
spec:
  containers:
    - name: busybox
      image: busybox
      command: ["/bin/sh", "-c"]
      args: ["sleep 999999"]
      volumeMounts:
        - name: data
          mountPath: "/mnt"
  volumes:
    - name: data
      persistentVolumeClaim:
        claimName: mydata
```

```
$ kubectl -n destination apply -f pod.yaml
pod/busybox created

$ kubectl -n destination exec -it pod/busybox -- ls -al /mnt
total 12
drwx--x--x   3 101587  101587      4096 Mar  2 18:37 .
dr-xr-xr-x   1 root    root          73 Mar  2 18:39 ..
-rw-----   1 101587  101587        6 Mar  2 18:37 hi.txt
drwx--x--x  23 101587  101587     4096 Mar 27 2018 linux-4.1.51

$ kubectl -n destination exec -it pod/busybox -- du -sh /mnt
655.4M      /mnt
```

## 2.11.2 Asynchronous replication

### \$ kubectl volsync replication

Replicate the contents of one PersistentVolume to another.

This set of commands is designed to set up and manage a replication relationship between two different PVCs in the same Namespace, across Namespaces, or in different clusters. The contents of the volume can be replicated either on-demand or based on a provided schedule.

Usage:

```
kubectl-volsync replication [command]
```

Available Commands:

create	Create a new replication relationship
delete	Delete an existing replication relationship
schedule	Set replication schedule for the relationship
set-destination	Set the destination of the replication
set-source	Set the source of the replication
sync	Run a single synchronization

### Example usage

#### Example steps

- *Kubectl configuration*
- *Deploy the application*
- *Set up replication*
- *Examining VolSync resources*
- *Manual synchronization*
- *Removing the replication*

The following example uses the `kubectl volsync replication` subcommand to set up and manage cross-cluster asynchronous replication of a PVC.

#### Application

A simple busybox pod that has a PVC attached

#### Source cluster

Kind cluster running on a local laptop using the hostpath CSI driver

#### Destination cluster

OpenShift running on GCP with their CSI driver

### Kubectl configuration

The following steps assume that you have a kubeconfig defined that will allow access to both clusters (source and destination) by switching between contexts.

```
$ kubectl config get-contexts
CURRENT  NAME          CLUSTER          AUTHINFO          NAMESPACE
*        gcp           ci-ln-nm6319k-72292  admin
        kind       kind-kind        kind-kind
```

A configuration like the above will allow directing requests to the different clusters via `kubectl --context <name>`. Likewise, some of the VolSync CLI commands will refer to this context name (e.g., `<context>/<namespace>/<resource>`).

Please see [the Kubernetes documentation](#) for details on how to set up your kubeconfig to access multiple clusters.

### Deploy the application

The application is a simple busybox pod and an attached PVC.

Listing 35: pvc.yaml

```
---
kind: PersistentVolumeClaim
apiVersion: v1
metadata:
  name: datavol
spec:
  storageClassName: csi-hostpath-sc
  accessModes:
    - ReadWriteOnce
  resources:
    requests:
      storage: 3Gi
```

Listing 36: pod.yaml

```
---
kind: Pod
apiVersion: v1
metadata:
  name: busybox
spec:
  containers:
    - name: ubi
      image: busybox
      command: ["/bin/sh", "-c"]
      args: ["sleep 999999"]
      volumeMounts:
        - name: data
          mountPath: "/mnt"
  volumes:
    - name: data
```

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```
persistentVolumeClaim:
claimName: datavol
```

Create the namespace and application objects:

```
$ kubectl --context kind create ns source
namespace/source created

$ kubectl --context kind -n source create -f pvc.yaml
persistentvolumeclaim/datavol created

$ kubectl --context kind -n source create -f pod.yaml
pod/busybox created
```

## Set up replication

Create a replication relationship. We are naming the relationship “example”:

```
$ kubectl volsync replication -r example create
```

Set the source of the replication:

- The hostpath CSI driver supports volume cloning, so we’ll use “Clone” as our method to create a point-in-time copy
- The name of the PVC to replicate is given as <cluster-context>/<namespace>/<name>

```
$ kubectl volsync replication -r example set-source --copymethod Clone --pvcname kind/
↪source/datavol
```

Set the destination:

```
# Create a namespace on the destination cluster
$ kubectl --context gcp create ns destns
namespace/destns created

$ kubectl volsync replication -r example set-destination --copymethod Snapshot --
↪storageclass standard-csi --volumesnapshotclass csi-gce-pd-vsc --servicetype_
↪LoadBalancer --destination gcp/destns/datavol
```

Begin replicating on a 5 minute schedule:

```
$ kubectl volsync replication -r example schedule --cronspec '*/*5 * * * *'
I0216 13:51:22.165811 275823 replication.go:381] waiting for keys & address of_
↪destination to be available
I0216 13:51:32.296465 275823 replication.go:406] creating resources on Source
```

## Examining VoISync resources

The above commands deployed a ReplicationSource and ReplicationDestination object on the two clusters:

```
$ kubectl --context kind -n source get replicationsource -oyaml
apiVersion: v1
items:
- apiVersion: volsync.backube/v1alpha1
  kind: ReplicationSource
  metadata:
    creationTimestamp: "2022-02-16T20:07:30Z"
    generation: 1
    labels:
      volsync.backube/relationship: 90d56bef-551d-4ede-b6a7-0783cabdafb6
    name: datavol-87srf
    namespace: source
    resourceVersion: "13695"
    uid: 7511b291-b768-4a2e-96cf-2eafd3854469
  spec:
    rsync:
      address: 34.121.93.205
      copyMethod: Clone
      sshKeys: datavol-87srf
      sourcePVC: datavol
      trigger:
        schedule: '*/5 * * * *'
  status:
    conditions:
    - lastTransitionTime: "2022-02-16T20:07:58Z"
      message: Waiting for next scheduled synchronization
      reason: WaitingForSchedule
      status: "False"
      type: Synchronizing
    - lastTransitionTime: "2022-02-16T20:07:30Z"
      message: Reconcile complete
      reason: ReconcileComplete
      status: "True"
      type: Reconciled
    lastSyncDuration: 28.732770544s
    lastSyncTime: "2022-02-16T20:07:58Z"
    nextSyncTime: "2022-02-16T20:10:00Z"
    rsync: {}
  kind: List
  metadata:
    resourceVersion: ""
    selfLink: ""

$ kubectl --context gcp -n destns get replicationdestination -oyaml
apiVersion: v1
items:
```

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```

creationTimestamp: "2022-02-16T20:06:10Z"
generation: 1
labels:
  volsync.backube/relationship: 90d56bef-551d-4ede-b6a7-0783cabdafb6
name: datavol
namespace: destns
resourceVersion: "42743"
uid: 040dc4ad-6f37-43f1-9da4-b28d956f2bb7
spec:
  rsync:
    accessModes:
      - ReadWriteOnce
    capacity: 3Gi
    copyMethod: Snapshot
    serviceType: LoadBalancer
    storageClassName: standard-csi
    volumeSnapshotClassName: csi-gce-pd-vsc
status:
  conditions:
    - lastTransitionTime: "2022-02-16T20:06:10Z"
      message: Reconcile complete
      reason: ReconcileComplete
      status: "True"
      type: Reconciled
    - lastTransitionTime: "2022-02-16T20:08:00Z"
      message: Synchronization in-progress
      reason: SyncInProgress
      status: "True"
      type: Synchronizing
lastSyncDuration: 1m50.209297869s
lastSyncStartTime: "2022-02-16T20:08:00Z"
lastSyncTime: "2022-02-16T20:08:00Z"
latestImage:
  apiGroup: snapshot.storage.k8s.io
  kind: VolumeSnapshot
  name: volsync-datavol-dst-20220216200800
  rsync:
    address: 34.121.93.205
    sshKeys: volsync-rsync-dst-src-datavol
kind: List
metadata:
  resourceVersion: ""
  selfLink: ""

```

When creating the resources, the CLI:

- Created the ReplicationDestination
- Waited for the LoadBalancer address and SSH keys to become available
- Copied the SSH keys from the destination cluster to a Secret in the source cluster
- Created the ReplicationSource referencing the Secret, the remote address, and having the supplied cron schedule

### Manual synchronization

The above steps establish a replication schedule wherein the source is periodically replicated to the destination. During planned migration events, it is desirable to force a synchronization and synchronously wait for completion.

Assuming the CLI has been used as described above, a manual synchronization can be triggered via:

```
$ kubectl volsync replication -r example sync
I0216 15:19:19.832648 290779 replication.go:381] waiting for keys & address of
↳ destination to be available
I0216 15:19:19.954913 290779 replication.go:406] creating resources on Source
I0216 15:19:19.988886 290779 replication_sync.go:90] waiting for synchronization to
↳ complete
```

When this command returns, a new synchronization (and VolumeSnapshot) will have been completed. To resume periodic synchronization, re-issue the `kubectl volsync replication schedule` command.

### Removing the replication

When the replication relationship is no longer needed, it can be removed via:

```
$ kubectl volsync replication -r example delete
```

The above command removes the VolSync CRs and the SSH key Secret.

VolSync provides a CLI interface to assist in performing common operations using the VolSync operator.

All the tasks that can be accomplished via this CLI can also be performed by directly manipulating VolSync's ReplicationSource and ReplicationDestination objects. It is meant as a simple shortcut for common operations:

- *Setting up asynchronous data replication*
- *Migrating data into Kubernetes*

### 2.11.3 Installation

The VolSync CLI (kubectl plugin) can be installed in several ways:

- Via krew (easiest)
- Downloading the latest released binary from GitHub
- From source (requires a working golang installation)

Krew

Binary release

Source

[Krew](#) is a plugin manager for the `kubectl` command. It automates the process of downloading, installing, and updating `kubectl` plugins.

If you have Krew installed, you can install the VolSync plugin via:

```
# Install the VolSync plugin
$ kubectl krew install volsync
Updated the local copy of plugin index.
```

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```

Installing plugin: volsync
Installed plugin: volsync
\
| Use this plugin:
|   kubectl volsync
| Documentation:
|   https://github.com/backube/volsync
/
WARNING: You installed plugin "volsync" from the krew-index plugin repository.
  These plugins are not audited for security by the Krew maintainers.
  Run them at your own risk.

# Use it...
$ kubectl volsync --version
volsync version v0.4.0+b710c5f

```

The plugin can be uninstalled via:

```

# Uninstall the VolSync plugin
$ kubectl krew uninstall volsync
Uninstalled plugin: volsync

```

Future upgrades are also possible via `kubectl krew upgrade volsync`.

The plugin is available on the [VolSync Releases](#) page. Download the `kubectl-volsync.tar.gz` and place the included `kubectl-volsync` binary into your `PATH`. The plugin should then be available as a sub-command of `kubectl`:

```

$ kubectl volsync --version
volsync version v0.4.0+b710c5f

```

To uninstall, just delete the `kubectl-volsync` binary.

The plugin can be installed directly from source. This requires a working `golang` environment, but it also allows easily choosing the version to be installed (even the latest code from `main`).

The latest **Released** version can be installed via:

```

$ go install github.com/backube/volsync/kubectl-volsync@latest
go: downloading github.com/backube/volsync v0.4.0

$ which kubectl-volsync
~/go/bin/kubectl-volsync

```

The **latest code from main** can be installed via:

```

$ go install github.com/backube/volsync/kubectl-volsync@main
go: downloading github.com/backube/volsync v0.3.1-0.20220512205923-e33a7e4d88b6

```

Once installation is complete, navigate to one of the documentation sub-pages for some CLI usage examples.

## 2.12 ReplicationDestination Volume Populator

### Contents

#### ReplicationDestination Volume Populator

- *Configuring a PVC with ReplicationDestination Volume Populator*

When a PVC is created that directly references a ReplicationDestination object, VolSync's Volume Populator controller will automatically fill the PVC with the most recent replicated data, alleviating the need to manually specify the name of the Snapshot.

**Note:** The VolumePopulator feature of VolSync is available with kubernetes v1.22 and above with the *AnyVolumeDataSource* feature gate enabled. The *AnyVolumeDataSource* feature gate is enabled by default as of v1.24.

When replicating or restoring a PVC via a ReplicationDestination using a VolumeSnapshot, the end result is a VolumeSnapshot that contains the latestImage from the last successful synchronization. Previously to create a PVC with the synchronized data, you needed to create a PVC with a dataSourceRef that points to the VolumeSnapshot created by the ReplicationDestination. The VolSync volume populator means you can instead point the dataSourceRef of a PVC to the VolSync ReplicationDestination resource. VolSync will take care of finding the latestImage available in the ReplicationDestination (or waiting for it to appear after replication completes) and then populating the PVC with the contents of the VolumeSnapshot.

### 2.12.1 Configuring a PVC with ReplicationDestination Volume Populator

This example will assume you have a working ReplicationDestination setup that is replicating/synchronizing data. The example used here uses the Rclone mover, but other movers could be used. For more information about setting up the replication itself, refer to the docs for the mover you are interested in.

**Note:** The ReplicationDestination used with the volume populator must use a copyMethod of *Snapshot*.

Here's an example of a ReplicationDestination.

Listing 37: ReplicationDestination object

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: rclone-replicationdestination
  namespace: dest
spec:
  trigger:
    # Every 6 minutes, offset by 3 minutes
    schedule: "3,9,15,21,27,33,39,45,51,57 * * * *"
  rclone:
    rcloneConfigSection: "aws-s3-bucket"
    rcloneDestPath: "volsync-test-bucket/mysql-pvc-claim"
```

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```

rcloneConfig: "rclone-secret"
copyMethod: Snapshot
accessModes: [ReadWriteOnce]
capacity: 10Gi
storageClassName: my-sc
volumeSnapshotClassName: my-vsc
status:
  lastSyncDuration: 30.038338887s
  lastSyncTime: "2023-08-13T07:29:36Z"
  latestImage:
    apiGroup: snapshot.storage.k8s.io
    kind: VolumeSnapshot
    name: volsync-rclone-replicationdestination-dest-20230813072935

```

Now a PVC can be created that uses this ReplicationDestination. This PVC will be populated with the contents of the VolumeSnapshot indicated in the `status.latestImage` of the ReplicationDestination.

Listing 38: PVC object

```

---
apiVersion: v1
kind: PersistentVolumeClaim
metadata:
  name: restored-pvc
  namespace: dest
spec:
  accessModes: [ReadWriteOnce]
  dataSourceRef:
    kind: ReplicationDestination
    apiGroup: volsync.backube
    name: rclone-replicationdestination
  resources:
    requests:
      storage: 10Gi
  storageClassName: my-sc

```

The `.spec.dataSourceRef.kind` must be set to `ReplicationDestination` and the `.spec.dataSourceRef.apiGroup` must be set to `volsync.backube`.

`.spec.dataSourceRef.name` should be the name of your `ReplicationDestination`.

The VolSync volume populator controller will start to populate the volume with the latest available snapshot indicated in the `ReplicationDestination` at `.status.latestImage`. In the above example `ReplicationDestination` this would be: `volsync-rclone-replicationdestination-dest-20230813072935`.

**Note:** If no `latestImage` exists yet, then the PVC will remain in pending state until the `ReplicationDestination` completes and a snapshot is available. In this way you could create a `ReplicationDestination` and a PVC that uses the `ReplicationDestination` at the same time. The PVC will only start the volume population process after the `ReplicationDestination` has completed a replication and a snapshot is available (as seen in `.status.latestImage`).

Additionally, if the storage class used (`my-sc` in the example) has a `volumeBindingMode` of `WaitForFirstConsumer`, the volume populator will need to wait until there is a consumer of the PVC before it gets populated. When a consumer does come along (for example a pod that wants to mount the PVC), then the volume will be populated at that time. At this point the VolSync volume populator controller will take the `latestImage`

from the ReplicationDestination, which may have been updated if additional replications have occurred since the PVC was created.

---

Once the PVC has been populated, the status should be updated and it can be used. Here is an example of the PVC after it has been populated.

Listing 39: PVC object after volume population complete

```
---
apiVersion: v1
kind: PersistentVolumeClaim
metadata:
  annotations:
    pv.kubernetes.io/bind-completed: "yes"
    pv.kubernetes.io/bound-by-controller: "yes"
    volume.beta.kubernetes.io/storage-provisioner: hostpath.csi.k8s.io
    volume.kubernetes.io/storage-provisioner: hostpath.csi.k8s.io
  creationTimestamp: "2023-08-13T07:24:23Z"
  finalizers:
  - kubernetes.io/pvc-protection
  name: restored-pvc
  namespace: dest
  resourceVersion: "4520"
  uid: 55f748d8-538c-4457-b36f-ad1f956290d2
spec:
  accessModes: [ReadWriteOnce]
  dataSource:
    kind: ReplicationDestination
    apiGroup: volsync.backube
    name: rclone-replicationdestination
  dataSourceRef:
    kind: ReplicationDestination
    apiGroup: volsync.backube
    name: rclone-replicationdestination
  resources:
    requests:
      storage: 10Gi
  storageClassName: my-sc
  volumeMode: Filesystem
  volumeName: pvc-dec29e3a-6f21-4eb0-84b2-b9d9d875f486
status:
  accessModes:
  - ReadWriteOnce
  capacity:
    storage: 10Gi
  phase: Bound
```

There are four different replication methods built into VolSync. Choose the method that best fits your use-case:

### *Rclone replication*

Use Rclone-based replication for multi-way (1:many) scenarios such as distributing data to edge clusters from a central site.

### *Restic backup*

Create a Restic-based backup of the data in a PersistentVolume.

### *Rsync replication (via TLS)*

Use Rsync-based replication for 1:1 replication of volumes in scenarios such as disaster recovery, mirroring to a test environment, or sending data to a remote site for processing.

### *Rsync replication (via ssh)*

This is the original rsync-based mover for 1:1 data replication. New deployments should favor the TLS-based implementation since the mover requires fewer privileges.

### *Syncthing replication*

Use Syncthing-based replication for multi-way (many:many), live, eventually consistent data replication in scenarios where the data is spread-out and updated in real-time, such as a wiki application, or a private distributed file-store.

## 2.13 Permission model

The data replication mover Pods run in the user's source and destination Namespaces. The permissions that are given to these Pods control what data can be replicated. They also affect the security of the cluster. Please see the [permission model documentation](#) for more details.

## 2.14 Resource requirements

The data replication mover Pods can be configured to set specific resource requirements. This can include CPU and memory resource requirements or resource limits. Please see the [resource requirements documentation](#) for more details.

## 2.15 Triggers

VolSync *supports several types of triggers* to specify when to schedule the replication.

## 2.16 PVC Annotations for Copy Triggers

VolSync *supports source PVC annotations* to coordinate triggering when VolSync takes a copy (snapshot or clone) for a replication.

## 2.17 Metrics

VolSync *exposes a number of metrics* that permit monitoring the status of replication relationships via Prometheus.

## 2.18 Volume Populator

VolSync provides a *Volume Populator* to allow creation of PVCs that reference a ReplicationDestination as a data-SourceRef.

## ENHANCEMENT PROPOSALS

### 3.1 A case for VolSync

#### Contents

- *A case for VolSync*
  - *Motivation*
  - *Use cases*
  - *Proposed solution*
  - *Initial implementation*

#### 3.1.1 Motivation

As Kubernetes is used in an increasing number of critical roles, businesses are in need of strategies for being able to handle disaster recovery. While each business has its own requirements and budget, there are common building blocks employed across many DR configurations. One such building block is asynchronous replication of storage (PV/PVC) data between clusters.

While some storage systems natively support async replication (e.g, Ceph's RBD or products from Dell/EMC and NetApp), there are many that lack this capability, such as Ceph's cephfs or storage provided by the various cloud providers. Additionally, it is sometimes advantageous to have different storage systems for the source and destination, making vendor-specific replication schemes unworkable. For example, it can be advantageous to have different storage in the cloud vs. on-prem due to resource or environmental constraints.

This project proposes to create a general method for supporting asynchronous, cross-cluster replication that can work with any storage system supporting a CSI-based storage driver. Given a single configuration interface, the controller would implement replication using the most efficient method available. For example, a simplistic CSI driver without snapshot capabilities should still be supported via a best-effort data copy, but a storage system w/ inbuilt replication capabilities should be able to use those mechanisms for fast, efficient data transfer.

### 3.1.2 Use cases

While disaster recovery is the most obvious use for asynchronous storage replication, there are a number of different scenarios that could benefit.

#### Case (1) - Async DR

As an application owner, I'd like to ensure my application's data is replicated off-site to a potentially different secondary cluster in case there is a failure of the main cluster. The remote copy should be crash-consistent such that my application can restart at the remote site.

Once a failure has been repaired, I'd like to be able to "reverse" the synchronization so that my primary site can be brought back in sync when the systems recover.

#### Case (2) - Off-site analytics

As a data warehouse owner, I'd like to periodically replicate my primary data to one or more secondary locations where it can be accessed, read-only, by a scale-out ML or analytics platform.

#### Case (3) - Testing w/ production data

As a software developer, I'd like to periodically replicate the data from the production environment into an isolated staging environment for continuous testing with real data prior to deploying application updates.

#### Case (4) - Application migration

As an application owner, I'd like to migrate my production stateful application to a different storage system (either on the same or different Kubernetes cluster) with minimal downtime. I'd like to have the bulk of the data synchronized in the background, allowing for minimal downtime during the actual switchover.

### 3.1.3 Proposed solution

Using CustomResources, it should be possible for a user to designate a PersistentVolumeClaim on one cluster (the source) to be replicated to a secondary location (the destination), typically on a different cluster. An operator that watches this CR would then initialize and control the replication process.

As stated above, remote replication should be supported regardless of the capabilities of the underlying storage system. To accomplish this, the VolSync operator would have one or more built-in generic replication methods plus a mechanism to allow offloading the replication directly to the storage system when possible.

Replication by VolSync is solely targeted at replicating PVCs, not objects. However, the source and destination volumes should not need to be of the same volume access mode (e.g., RWO, RWX), StorageClass, or even use the same CSI driver, but they would be expected to be of the same volume mode (e.g., Block, Filesystem).

## Potential replication methods

For specific storage systems to be able to optimize, the replication and configuration logic must be modular. The method to use will likely need to be specified by the user as there's no standard Kubernetes method to query for capabilities of CSI drivers or vendor storage systems. When evaluating the replication method, if the operator does not recognize the specified method as one internal to the operator, it would ignore the replication object so that a different (storage system-specific) operator could respond. This permits vendor-specific replication methods without requiring them to exist in the main VolSync codebase.

There are several methods that could be used for replication. From (approximately) least-to-most efficient:

### 1) Copy of live PVC into another PVC

- This wouldn't require any advanced capabilities of the CSI driver, potentially not even dynamic provisioning
- Would not create crash-consistent copies. Volume data would be inconsistent and individual files could be corrupted. (Gluster's georep works like this, so it may have some value)
- For RWO volumes, the copy process would need to be co-scheduled w/ the primary workload
- Copy would be via rsync-like delta copy

### 2) Snapshot-based replication

- Requires CSI driver to support snapshot
- Source would be snapshotted, the snapshot would be used to create a new volume that would then be replicated to the remote site
- Copy would be via rsync-like delta copy
- Remote site would snapshot after each complete transfer

### 3) Clone-based replication

- Requires CSI driver to support clone
- Source would be cloned directly to create the source for copying
- Copy would be via rsync-like delta copy
- Remote site would snapshot after each complete transfer

### 4) Storage system specific

- A storage system specific mechanism would need to both set up the relationship and handle the sync.
- Our main contribution here would be a unifying API to provide a more consistent interface for the user.

## Built-in replication

With the exception of the storage system specific method, the other options require the replication to be handled by VolSync, copying the data from the source to the destination volume.

It is desirable for VolSync's replication to be relatively efficient and only transfer data that has changed. As a starting point for development, it should be possible to use a pod running `rsync`, transferring data over an ssh connection.

### 3.1.4 Initial implementation

The initial VolSync implementation should be focused on providing a minimal baseline of functionality that provides value. As such, the focus will be providing clone-based replication via an `rsync data mover`, and this implementation will assume both the source and destination are Kubernetes clusters.

## 3.2 Configuration and CRDs

This document covers the rationale for how VolSync is configured and the structure of the CustomResourceDefinitions.

### Contents

- *Configuration and CRDs*
  - *Representation of relationships*
  - *Proposed CRDs*

### 3.2.1 Representation of relationships

One of the main interaction points between users and VolSync will be centered around configuring the replication relationships between volumes. When looking at the *use cases* presented in the overview of VolSync, there are several commonalities and differences.

#### Replication triggers

Depending on the use case, the “trigger” for replication may be different. For example, in the case of asynchronous replication for disaster recovery, it is desirable to have the volume(s) replicated at some predictable frequency (e.g., every five minutes). This bounds the amount of data loss that would be incurred during a failover. Some of the other use cases could benefit from scheduled replication (e.g., every day at 3:00am) such as the case of replicating from production to a testing environment. Still other cases may want the replication to be triggered on-demand or via a webhook since it may be desirable to replicate data once a certain action or processing has completed.

#### Bi-directional vs. uni-directional

Use cases such as disaster recovery naturally desire the replication to be bi-directional (i.e., reversible) so that once the primary site recovers, it can be brought back into sync and the application transitioned back. However, many of the other use cases only desire uni-directional replication—the primary will always remain so.

Further, when volumes are being actively replicated-to (i.e., they are the secondary), they are not in a usable state. Some storage systems actively block their usage until they are “promoted” to an active state, halting or reversing the replication. At best, even if not blocked, the secondary should not be used while replication is ongoing due to the potential of accessing inconsistent data. This has implications on the representation of the “volume” within a Kubernetes environment. For example, it is assumed that a PV/PVC, if bound, is usable by a pod, so exposing a secondary volume as a PV/PVC pair to the user is likely to cause confusion.

Based on the above, a clean interface for the user is likely to be one where a primary PVC is replicated to a destination location as a uni-directional relationship, and the secondary is not visible as a PVC until a “promotion” action is taken.

The lack of a secondary PVC until promotion is what precludes the bi-directional relationship. Instead, two uni-directional relationships could be created. The second, “reverse” relationship would not initially be active since its source PVC would not exist until a secondary volume is promoted.

### 3.2.2 Proposed CRDs

Since one of the main objectives in the design is to allow storage system specific replication methods, this must be considered when designing the CRDs that will control replication. In order to accommodate separate release timelines and licensing models, it is also desirable for those replication methods to be external to the main VolSync operator. Only a baseline, general replication method needs to be directly integrated.

To achieve the desired flexibility, the CRDs can be structured similar to the Kubernetes `StorageClass` object which defines a “provisioner” and permits a set of provisioner-specific parameters passed as an arbitrary set of key/value strings.

With the above considerations in mind, the primary side of the replication relationship could be defined as:

Listing 1: CRD defining the source volume to replicate

```

apiVersion: volsync/v1alpha1
kind: Source
metadata:
  name: myVolMirror
  namespace: myNamespace
spec:
  # Source PVC to replicate
  source: my-pvc
  # When/how often to replicate
  trigger:
    # Cronspec for mirroring frequency or schedule
    schedule: "*/10 * * * * *"
  # Method of replication. Either built-in "rsync" or an external method
  # (e.g., "ceph.io/rbd-async")
  replicationMethod: Rsync
  # Method-specific configuration parameters
  parameters: # map[string]string
    param1: value2
status:
  # Method-specific status
  methodStatus: # map[string]string
    status1: value2
  conditions: # general conditions

```

The secondary side is configured similarly to the primary, but without the trigger specification:

Listing 2: CRD defining the replication destination

```

apiVersion: volsync/v1alpha1
kind: Destination
metadata:
  name: myVolMirror
  namespace: myNamespace
spec:
  replicationMethod: Rsync

```

(continues on next page)

```
parameters:
  param1: value2
status:
  methodStatus:
    status1: value2
conditions:
```

## 3.3 Rsync-based data mover

This document covers the design of the rsync-based data mover.

### Contents

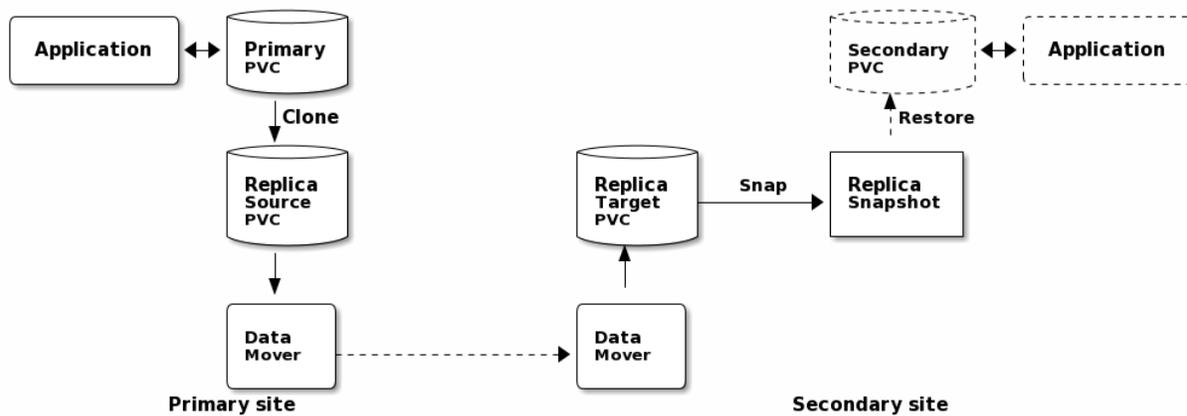
- *Rsync-based data mover*
  - *Overview*
  - *Replication flow*
  - *Setup*

### 3.3.1 Overview

To meet the goal of being able to replicate arbitrary volumes, VolSync must have a built-in, baseline replication method. *Rsync* is a well-known and reasonably efficient method to synchronize file data between two locations. It supports both data compression as well as differential transfer of data. Further, its support of ssh as a transport allows the data to be transferred securely, authenticating both sides of the communication.

### 3.3.2 Replication flow

- 1) A point-in-time image of the primary application's data is captured by cloning the application's PVC. This new "replica source" PVC serves as the source for one iteration of replication.
- 2) A data mover pod is started on the primary side that syncs the data to a data mover pod on the secondary side. The data is transferred via rsync (running in the mover pods) over ssh. A shared set of keys allows mutual authentication of the data movers.
- 3) After successfully replicating the data to a target PVC on the secondary, the secondary PVC is snapshotted to create a point-in-time copy that is identical to the image captured in step 1.
- 4) The process can be repeated, beginning again with step 1. Subsequent transfers will only need to transfer changed data since the target PVC on the secondary is re-used with each iteration.



## Failover

When the primary application has failed, the secondary site should take over. In order to start the application on the secondary site, the synchronized data must be made accessible in a PVC.

As a part of bringing up the application, its PVC is created from the most recent “replica snapshot”. This promotion of the snapshot to a PVC is only necessary during failover. The majority of the time (i.e., while the primary is properly functioning), old replica snapshots will be replaced with a new snapshot at the end of each round of synchronization.

## Resynchronization

After the primary site recovers, its data needs to be brought back in sync with the secondary (currently the active site). This is accomplished by having a reverse synchronization path identical to the flow above but with data flowing from the secondary site to the primary.

The replication from secondary to primary can be configured a priori, with the data movement only happening after failover. For example, the reverse replication would use “Secondary PVC” from the above diagram as the volume to replicate. In normal operation, this volume would not exist, idling the reverse path. Once the secondary site becomes the active site, that PVC would exist, allowing the reverse synchronization to flow, resulting in replicated snapshots on the primary side. These can later be used to recreate the “Primary PVC”, thus restoring the application to the primary site.

### 3.3.3 Setup

As a part of configuring the rsync replication, a CustomResource needs to be created on both the source and destination cluster. This configuration must contain:

#### Connection information

Synchronization is handled via a push model— the source creates the connection to the destination cluster. As such, the source must be provided with the host/port information necessary to contact the destination.

#### Authentication credentials

An ssh connection is used to carry the rsync traffic. This connection is made via shared public keys between both sides of the connection. This allows the destination (ssh server) to authenticate the source (client) as well as allowing the source to validate the destination (by checking an associated ssh host key).

In order to make the configuration as easy as possible, the destination CR should be created first. When reconciling, the operator will generate the appropriate ssh keys and connection information in a Kubernetes Secret, placing a reference to that secret in the Destination CR's `status.methodStatus` map.

This Secret will then be copied to the source cluster and referenced in `spec.parameters` when creating the Source CR.

### 3.4 Restic-based data mover

---

#### Enhancement status

Status: Proposed

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This is a proposal to add [Restic](#) as an additional data mover within VolSync. Restic is a data backup utility that copies the data to an object store (among other options).

While the main purpose of VolSync is to perform asynchronous data replication, there are some use cases that are more “backup oriented” but that don't require a full backup application (such as Velero). For example, some users may deploy and version control their application via GitOps techniques. These users may be looking for a simple method that allows preserving (off-cluster) snapshots of their storage so that it can be restored if necessary.

#### 3.4.1 Considerations

The `ReplicationSource` and `ReplicationDestination` CRs of VolSync would correspond to the `backup` and `restore` operations, respectively, of Restic. Furthermore, there are repository maintenance operations that need to be addressed. For example, Restic manages the retention of old backups (via its `forget` operation) as well as freeing objects that are no longer used (via its `prune` operation).

While both Restic and Rclone read/write to object storage, their strengths are significantly different. The Rclone data mover is primarily designed for managing 1-to-many replication relationships, using the object store as an intermediary. On each sync, Rclone updates the object bucket to be identical to the current version of the source volume, making no attempt to preserve previous images. This works well for replication scenarios, but it may not be desirable when protection from accidental data deletion is desired. On the other hand, Restic is well suited for maintaining a series of historical versions in an efficient manner, but it is not designed for syncing data. The restore operation makes no allowance for small delta transfers.

#### 3.4.2 CRD for Restic mover

In the normal case, the expected usage would be to have a `ReplicationSource` that controls the periodic backups of the data. It would use the same “common volume options” that Rsync and Rclone use to create a point-in-time image prior to copying the data.

## Backup

Given that in the normal case, only the ReplicationSource would be used, the repository maintenance options should be set there.

```

---
apiVersion: volsync/v1alpha1
kind: ReplicationSource
metadata:
  name: source
  namespace: myns
spec:
  sourcePVC: pvcname
  trigger:
    schedule: "0 * * * *" # hourly backups
  restic:
    ### Standard volume options
    # ReplicationSourceVolumeOptions

    ### Restic-specific options
    pruneIntervalDays: # How often to prune the repository (*int)
    repository: # Secret name containing repository info (string)
    # Retention policy for the backups
    retain:
      last: # Keep the last n snapshots (*int)
      hourly: # Keep n hourly (*int)
      daily: # Keep n daily (*int)
      weekly: # Keep n weekly (*int)
      monthly: # Keep n monthly (*int)
      yearly: # Keep n yearly (*int)
      within: # Keep all within this duration (e.g., "3w15h") (*string)

```

The `.spec.restic.repository` Secret reference in the above structure refers to a Secret in the same Namespace of the following format. The Secret's "keys" correspond directly to the environment variables supported by Restic.

```

---
apiVersion: v1
kind: Secret
metadata:
  name: resticRepo
type: Opaque
data:
  # The repository url
  RESTIC_REPOSITORY: s3:s3.amazonaws.com/bucket_name
  # The repository encryption key
  RESTIC_PASSWORD: XXXXX
  # ENV vars specific to the back end
  # https://restic.readthedocs.io/en/stable/030_preparing_a_new_repo.html
  AWS_ACCESS_KEY_ID: (access key)
  AWS_SECRET_ACCESS_KEY: (secret key)

```

### Restore

For now, with VolSync, the intention is to only support restoring the latest version of the backed-up data. For retrieving previous backups (that are still retained), Restic can be directly run against the repository, using the same information as in the Secret, above.

Restore would be handled by the following ReplicationDestination:

```
---
apiVersion: volsync.backube/v1alpha1
kind: ReplicationDestination
metadata:
  name: dest-sample
spec:
  trigger:
    schedule: "30 * * * *"
  restic:
    ### Standard volume options
    # ReplicationDestinationVolumeOptions

    ### Restic-specific options
    repository: # Secret name containing repository info (string)
```

There are comparatively few configuration options for Restore.

### 3.4.3 Open issues

The following items are open questions:

- Should ReplicationDestination support scheduling or should it be based on a single restore (i.e., it “syncs” once then never again)? This could also be simulated by having an arbitrarily long schedule since the 1st sync is immediate.
- Are Restic operations fast enough to make this viable?
  - The prune operation is documented as being rather slow
  - How long does it take to scan the storage to determine what needs to be backed up?
- Restic uses locks on the repository. Does the lack of concurrency present a problem for us? (Some can be done w/o locks... which ones?)
- What is the right way to expose prune?
  - It is the method for freeing space in the repo, but may be too expensive to run frequently

## 3.5 RWO volume affinity

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**RWO volume affinity**

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This document presents the design for co-scheduling data movers with application Pods so that ReadWriteOnce volumes can be live-replicated.

**3.5.1 Problem**

It is sometimes desirable to configure VolSync to sync data (ReplicationSource) from a “live” volume (i.e., one that is currently being used by the application). This corresponds to a `copyMethod: Direct` setting in the ReplicationSource. Some scenarios where this is useful include:

- When the CSI driver backing the source volume does not support clones or snapshots
- If the CSI driver is very inefficient at clone/snapshot objects (i.e., it internally performs a full data copy)
- If the source volume is not backed by a CSI driver

If the volume to be replicated has an `accessMode` of `ReadWriteMany` (RWX), the live volume can easily be replicated since there are no problems with the application and the VolSync mover accessing the same PVC simultaneously.

However, in the case of `ReadWriteOnce` (RWO) volumes, the PVC may only be accessed by a single Node at a time. If multiple Pods are to simultaneously access the volume, they must be co-scheduled to the same Node. Unfortunately, the Kubernetes scheduler does not take this into account when scheduling Pods. The result is that the VolSync mover pod is unlikely to be assigned to the same node as the primary application. This will result in it failing to start since the PVC will not be able to be mounted.

**3.5.2 Approach**

In cases where the ReplicationSource is configured with `copyMethod: Direct` and the sourcePVC has `accessMode: ReadWriteOnce`, VolSync should ensure the mover Pod is placed on the same Node as the primary workload. The below discussion only applies to such cases; all others will not be intentionally co-scheduled.

**Finding Pods**

Given a ReplicationSource and its associated sourcePVC, it is necessary to locate any Pods that are using the PVC. Unfortunately, there is no direct way to locate the Pod(s) directly from the PVC object.

Since PVCs are namespaced, it is guaranteed that any users of the PVC reside within that same Namespace. We need to list all Pods in the Namespace and search their `.spec.volumes[]` list to determine whether it contains a `persistentVolumeClaim.name` that matches sourcePVC. A number of scenarios are possible:

**No Pods are found to be using the PVC**

The mover can be scheduled without concern for affinity.

### Exactly one Pod is using the PVC

The mover should be scheduled to the same Node.

### Multiple Pods are using the PVC

If multiple Pods are **successfully** using the PVC, they must be scheduled to the same node. Therefore, any Pod that is currently in the `.status.phase: Running` can be used to determine the proper Node for scheduling purposes. It is possible that other Pods are *attempting to use* the PVC but are `Pending` because they cannot mount the volume. To handle this case, when looking for matching Pods, preference must be given to the `Running` Pods.

### Co-scheduling the mover

Given the name of a Pod with which the mover needs to be co-scheduled, the scheduling can be handled by directly assigning the mover to the same node. The current node for the application can be read from `.spec.nodeName`. This can be copied into the mover's `.spec.nodeName` (within the Job template). By directly specifying the node name, it will skip the scheduling pass and be directly picked up by kubelet on the named node.

In addition to directly specifying the name of the Node, it is important that the mover pod have the same set of tolerations as the application Pod to ensure it has access to the same set of Nodes. This can be handled by directly copying the list of tolerations from `.spec.tolerations` to the mover.

### Scheduling changes

The application's Pod(s) can be rescheduled for a number of reasons, and VolSync must be able to adapt in order to avoid interfering with the application. To this end, it is necessary to periodically re-scan the Pods and adjust the mover placement appropriately. These changes follow the logic documented above, potentially adding, removing, or changing the `.spec.nodeName` field in the Job template.

## 3.5.3 Limitations

These are some limitations of the proposed approach.

### Resource constraints

The Node that is being used by the application may not have sufficient resources to run the mover Pod. This will prevent the mover from starting until resources become available (if ever). The only way to handle this would be to re-schedule the application Pod to a Node that has more free resources. Adjusting the application in this way is beyond the scope of VolSync.

Is there a way that we could allow the user to reliably intervene?

### Interrupting the mover w/ rescheduling

While it is important to ensure that VolSync does not prevent the application from running, there is a trade-off between responding to changes and needlessly interrupting the mover. In this design, we err on the side of interrupting the mover. Since synchronization cycles are typically short, restarting the mover is unlikely to lose much work. Additionally, application restarts are expected to be rare, further lowering the cost.

While we could choose to allow the mover to run to completion prior to updating the node & tolerations, there would need to be special cases for long-running movers like Syncthing.

### Rescheduling delay

It will be necessary for VolSync to periodically re-reconcile while movement is InProgress so that updates to the scheduling can be detected and performed. This is planned to be handled in a time-based manner as opposed to setting up a Watch on Pods. This can potentially introduce a scheduling delay for the application of up to the re-reconcile interval (e.g., 1 minute) in cases where the mover is running and the application gets (re)scheduled.

This may be able to be handled via a Watch on the application Pod. However, it would be necessary to annotate the application Pod. It's unclear how feasible this would be.

#### *Asynchronous volume replication for Kubernetes CSI storage*

VolSync is a Kubernetes operator that performs asynchronous replication of persistent volumes within, or across, clusters. The replication provided by VolSync is independent of the storage system. This allows replication to and from storage types that don't normally support remote replication. Additionally, it can replicate across different types (and vendors) of storage.

To get started, see the *installation instructions*.

Check us out on GitHub <https://github.com/backup/volsync>