



SERVICE DESCRIPTION

Puppet Code Review

In-depth review of your Puppet code and recommendations on how to upgrade, improve, refactor, or replace it.

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Overview

The goal of the Puppet Code Review is to give the Customer a firm understanding of the state of their Puppet codebase and clear recommendations based on opportunities and challenges discussed during the engagement.

Puppet Consultants will use a combination of stakeholder interviews and manual and automated code review tooling to provide the Customer with a report on the state of their code, specific issues identified, suggestions for remediation, and recommendations for future improvements.

Recommended for

- Customers using Puppet Code in Puppet Enterprise or Puppet Open Source for 6+ months
- Customers wanting an expert review of their existing Puppet code
- Customers wanting an expert recommendation on next steps to take based on this code review

Consulting Services Description

Puppet will provide the following services related to the implementation of a Code Review:

1. Pre-engagement planning and preparation

- a. Discovery call(s)
- b. Identify 3-5 Puppet-related stakeholders/subject matter experts (SMEs) to interview during engagement and confirm their availability
- c. Other preparation items as needed (research, testing, etc.)
 - i. Access to Puppet code base
 - ii. Prepare Puppet Enterprise installation to gather performance data
- d. To be completed by the Customer prior to the start of the engagement:
 - i. Confirm full-time availability of at least one technical contact for the duration of the engagement
 - ii. Confirm systems and version control access will be ready for engagement
 - iii. If information on code changes between major releases is desired, ensure that server resources are available to install, configure and test code with the Puppet Parser
 - iv. Turn on profiling for performance data

2. Engagement kickoff

- a. Review goals of engagement and project plan
- b. Discuss current usage of Puppet
 - i. History of usage
 - ii. What is/isn't working related to Puppet code
 - iii. Customer's specific goals for this Puppet Code Review
 - iv. Customer's future plans for managing additional items with Puppet
 - v. Other background information to make the engagement most useful

3. Initial automated code review

- a. Use automated tools to collect baseline data on Customer codebase, such as puppet-lint warnings, performance, and other static analysis-determined findings

- b. Use automated code review output to create appendix for leave-behind documentation

4. Interview identified stakeholders/SMEs

- a. Interview the stakeholders/SMEs identified in the pre-engagement or kickoff meeting to learn about current Puppet usage and areas of challenge and opportunity with the Puppet codebase
- b. Briefly discuss problem areas, potential workarounds, and newer features that may help, if applicable
- c. Note relevant items in leave-behind report

5. Manual review of Puppet code

- a. Review Customer's current and planned use of Puppet, with a focus on technical and non-technical topics related to Puppet code, such as:
 - i. Workflows
 - ii. Module development and testing
 - iii. Security
 - iv. Classification and data
 - v. Upgrade path
 - vi. Other areas determined during the engagement
- b. Manually review Customer's Puppet code, as time allows, for structure, version, compatibility, style, adherence to module design best practices, and other related practices
 - i. This review will focus on Customer-created or customized modules and manifests
 - ii. Customer should provide a list of specific modules to be reviewed, or guidance on selecting a representative sample

6. Findings review

- a. Recap meeting to review the draft report findings, reinforce concepts covered, and close out the engagement
- b. Areas of greatest interest from this meeting will impact the areas of emphasis in the final report

7. Final report revisions and engagement close-out

- a. Complete the final version of the report and send to Customer within 5 business days of the end of the engagement

Deliverables

1. Expert review of Puppet codebase and related processes and workflows
2. Post-engagement documentation, including:
 - a. Summary of finding and recommendations
 - b. Detailed report of finding and recommendations
 - c. Appendices of additional data gathered

Delivery Approach

Our delivery approach combines automated and manual collection of data about the Customer's Puppet Enterprise installation as well as in-depth interviews of multiple stakeholders to understand the technical and business goals and problems being faced. This approach allows for a high level of detail to be gathered in a short amount of time, enabling both very specific recommendations for technical issues and also a high-level perspective for non-technical items.

Phase 0: Kickoff call, prep, & initial discovery

The Puppet Consultant will spend up to half a day performing preparation and discovery work prior to the engagement. This includes pre-engagement call(s) with the Customer to discuss logistics and begin the discovery phase, project planning and preparation.

Phase 1: Engagement kickoff and automated discovery

The Puppet Consultant collaborates with the Customer to understand their technical and business goals. The consultant runs the Puppet code analysis tooling that gathers various detailed technical information and creates an appendix for the initial report that will be added to as the engagement progresses.

Phase 2: Interviewing

The Puppet Consultant and Customer stakeholders have in-depth discussions on technical and business struggles and successes that impact configuration management efforts. These interviews provide the Puppet Consultant with the detail needed to tailor the focus of the manual discovery.

Phase 3: Manual code review

The Puppet Consultant manually reviews the Customer's Puppet code with a focus on areas of opportunity or concern identified in the previous phases.

Phase 4: Findings review meeting

The Puppet Consultant meets with the Customer team to review the findings from manual and automated code review activities. The areas of Customer interest and focus from this meeting will impact the areas of emphasis in the final report.

Phase 5: Documentation

The Puppet Consultant will provide engagement documentation within five (5) business days of the end of the engagement, and will consist of the following:

- Summary of finding and recommendations
- Detailed report of findings and recommendations
- Appendices of additional data gathered

Timeline

Phases 1-4 of the Puppet Code Review (as outlined in this service description) require 4 days (32 hours), delivered over one week, to complete. In addition, 8 hours are set aside for preparation and documentation, with each requiring approximately 4 hours.

Fees

The fees for this project will be a fixed price for a maximum of 40 hours. Puppet will use best efforts to complete the Services within this timeframe, but this project will be deemed completed if the maximum number of hours is reached.

Key Assumptions

The following assumptions are reflected in the services, timeline, and estimated effort outlined in this service description:

1. Phases 1-4 of the engagement (as outlined in this service description) will be performed in one week during normal business hours (Monday through Friday, 8:00 a.m. - 5:00 p.m. local time) unless otherwise agreed to in writing by the parties.
2. Customer will provide prompt feedback on all deliverables.
3. Customer will provide prompt access to all systems and resources that Puppet will need to complete the work.
4. Customer must provide a single point of contact that will be available at least 75% of the time throughout the duration of the engagement.
5. Customer will provide Puppet with documentation and access to subject matter experts for non-Puppet systems/ software within the scope of the engagement.
6. Customer will have identified key personnel prior to the beginning of the engagement.
7. Customer will have all necessary security exceptions, firewall rules, network routers, computer and storage resources available prior to the start of the engagement, as detailed in Appendix 1 of this service description.
8. Puppet does not provide support for third-party software that is implemented as part of a Puppet solution, such as version control systems, repository management, packaging, and other software that is not part of the Puppet stack.
9. Services for this engagement will be provided remotely, unless Customer and Puppet mutually agree the Services will be performed on-site. In addition to the fees above, Customer will be responsible for travel and expenses for on-site Services.

Appendix 1 - Engagement Technical Requirements

A successful consulting engagement requires advance preparation. Failure to meet these pre-engagement requirements will have a direct impact on the completion of all the goals of the engagement.

The Customer is expected to review all requirements. Any requirements that are not met should be reported during the pre- engagement call or earlier. Puppet and the Customer will discuss the issues and determine whether to delay the engagement or attempt to work around the issue during the engagement.

The Puppet Code Review requires the following:

- Access to the version control system used to store Puppet Code
- Access to any other systems, documents, workflows, etc. which Customer would like reviewed as part of this engagement