



Puppet Code Review Service Description

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 Enterprise for 6+ months OR which are bringing a codebase from open source Puppet
- 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 Puppet Enterprise:

1. Pre-engagement planning and preparation

- a. Discovery call
- 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 (systems access, logistics, 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 that at least one technical contact has committed to be available for the duration of the engagement
 - ii. Confirm systems and version control access will be ready for engagement
 - iii. If 3.x → 4.x parser upgrade information is desired, confirm that a server is available for this
 - 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 Enterprise, 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 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
- c. Note findings in leave-behind report

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 findings and recommendations
 - b. Detailed report of findings 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 4 hours 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, and creation and review of an initial project plan.

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 spend four (4) hours completing engagement documentation. The final documentation deliverable will be provided to Customer within five (5) business days of the end of the engagement, and will consist of the following:

- Summary of findings 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. The chart below reflects the expected project timeline.

| Phase | Pre-engagement | Day 1 | Day 2 | Day 3 | Day 4 | Post-engagement |
|---------------------------------|----------------|-------|-------|-------|-------|-----------------|
| Preparation | | | | | | |
| Kickoff & automated code review | | | | | | |
| Interviewing | | | | | | |
| Manual code review | | | | | | |
| Findings review | | | | | | |
| Documentation | | | | | | |

Fees

| Product description | Hours | Cost |
|---------------------|----------|-------------|
| Puppet Code Review | Up to 40 | \$11,995.00 |

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.

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. A travel and expense estimate will be provided on the quote and billed at actuals not to exceed the estimate, unless otherwise specified in the quote that travel and expenses will be invoiced in full at the time of purchase. Any quote that does not include a travel and expense estimate will be performed remotely.

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 Thursday, 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 in order 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 Enterprise solution, such as version control systems, repository management, packaging, and other software that is not part of the Puppet Enterprise stack.

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

Appendix 2 - Summary of roles & responsibilities

- Puppet Consultant:** This refers to the Puppet Consultant who will be responsible for the delivery of the engagement. They will be involved in most if not all aspects of the engagement.
- Puppet Practitioner:** The Puppet Practitioner is the Customer’s technical point of contact who is primarily responsible for the Puppet Enterprise implementation and is assumed to be championing the continued expansion of the usage of Puppet Enterprise post-engagement. They bear the majority of the responsibility for working with Puppet during the engagement and are expected to be present for ~75% of the engagement. Their schedule should be adjusted to ensure they are able to give the engagement the focus necessary.
- Manager/Director:** This is most often the buyer or project sponsor at the Customer. Their role is to be aware of what is happening as part of the engagement and act as a point of contact/escalation should any assistance be needed from other groups, or if work is blocked at a level that the Practitioner cannot resolve.
- Stakeholders/Subject Matter Experts:** Subject Matter Experts are the technical specialists in non-Puppet systems/software who are aware of but may not be heavily involved in the use of Puppet Enterprise. This may include networking, provisioning, database, application, and development teams, or any other group that might be valuable to speak with as part of this engagement.

Note: Any group that has the potential to block progress during the engagement should be informed that the engagement is taking place so they are equipped to respond to any urgent requests.

| Responsibilities (? = may need to be involved) | Puppet Consultant | Puppet Practitioner | Manager/ Director | SME |
|---|-------------------|---------------------|----------------------|-----|
| Preparation | | | | |
| Review and verify pre-engagement requirements are met via email | | ✓ | ? | ? |
| Pre-engagement preparation | ✓ | ✓ | ✓ | ? |
| Pre-engagement kickoff call | ✓ | ✓ | ✓ | ? |
| Pre-engagement discovery call(s) | ✓ | ✓ | | ? |
| Kickoff and automated code review | | | | |
| Kickoff/discovery meeting | ✓ | ✓ | ✓ | ✓ |
| Finalize project plan | ✓ | ✓ | ✓ | |

| | | | | |
|--|---|---|---|---|
| Run automated code review tooling against Puppet code | ✓ | ? | | |
| Interviewing | | | | |
| Interview 3-5 Customer Subject Matter Experts | ✓ | ? | | ? |
| Manual code review | | | | |
| Manually inspect Puppet code | ✓ | ? | | |
| Review other related systems | ✓ | ✓ | | ? |
| Review related goals, processes, workflows | ✓ | ✓ | | ? |
| Other review areas TBD during engagement | ✓ | ✓ | | ? |
| Findings review | | | | |
| Findings review meeting | ✓ | ✓ | ✓ | ? |
| Documentation | | | | |
| Create final documentation | ✓ | | | |
| Review and check-in final documentation to version control | | ✓ | ? | |

? = May be needed

✓ = Required