

Chapter 7

Configuration Management

The entropy of an isolated system never decreases.
– Second Law of Thermodynamics

7.1 Introduction

As much as we would like them to be, computer systems are not static: files are created, modified, or removed; users log in and run commands; services are started or terminated. In addition, the requirements of the systems, dictated at least in part by evolving business needs or emerging technologies are changing all too frequently as well. This leads to new software being added, patched or upgraded; user accounts are added or removed; jobs are scheduled or their frequency changed; interactions with other systems are enabled or prevented. In other words, our systems do continuously undergo change.

On a single host, such changes are made by local modification of system configuration files, invocation of specific commands, and the installation or tuning of different applications. As we configure our machines, we may create detailed documentation about how to set up a given service, and the more systems we have, the more often we have to repeat the same steps to configure them, to upgrade software, or to rebuild them when they inevitably fail. Updating documentation to reflect the changes we may have made after the latest software update is tedious and error prone – it would be much easier to initially identify the changes, document them, and then have them be applied so that our hosts' configuration reflects the documentation, not the

other way around.

Taking this approach even further, we begin to build not only a document outlining what commands to execute, but a central inventory of what hosts perform which functions, which services are running and which software needs to be installed to produce, for example, a running web server suitable for serving production traffic.

We rarely operate on a single host only, and the larger our infrastructure, the more important it becomes to be able to discover systems by their attributes. For example: in order to apply a security update to our web servers, we need to first know exactly which of our many hosts are running the vulnerable version, and then perform the same steps of upgrading the service on them. Since we cannot possibly keep track of hundreds of changes across thousands of systems ourselves, we delegate the task of applying well defined sets of changes to (possibly very large) numbers of systems to a class of software known as Software Configuration Management (SCM) systems, or “CMs”.

We have hinted at the capabilities of such solutions before: near the end of Chapter 5, we explained that by the time the OS is installed on a host, we already have to perform at least a minimal amount of custom configuration. We also noted that in order to be able to add software on a host, CM requires a tight integration with the system’s package manager.

Following that, we discussed user accounts in the previous chapter, another example of our system’s changing characteristics: the set of users that should be allowed access to a given host changes regularly and frequently as people join or leave the organization.¹ Regardless of whether you use an LDAP or Active Directory (AD) service or whether you push changes to each hosts’ `/etc/passwd` file, certain modifications are necessary on each server.

It is the ironic fate of many a system administrator to have, at one time or another, written a set of programs to allow changes to all of their machines. These programs tend to start out as simple shell scripts that loop over all hostnames in the inventory, using `ssh(1)` and `rsync(1)` to copy files from one host to many, but as the environment grows, the painful realization that

¹Depending on the size of the organization, this data needs to be tightly integrated with a larger staff directory as well as various other systems such as payroll, your benefits related databases, or perhaps an external index of who should get keycards for the offices. Integration of these services, many of which are nowadays outsourced to third party providers, is well beyond the scope of this chapter, however. Once again, we’re scratching the surface of additional complex topics.

this approach does not scale starts to set in. We begin to understand that configuration management is not only about shuffling files around, but it tracks and enforces *state* on a system. We also need to be able to control running services and react to changes in the environment.

Fortunately, a number of mature and flexible CM solutions have emerged over the last few years. Today's junior system administrators are already likely to start out using tools like *CFEngine*[1], *Chef*[2], *Puppet*[3], or *Ansible*[4] to automate configuration changes across both small and large sets of hosts. But even the most advanced solution requires a fair amount of customization to be integrated into your environment as you scale up, and you will almost certainly learn valuable lessons as you try to avoid writing your own CM system.

Being able to fully take advantage of configuration management requires, not surprisingly, an initial learning curve as well as some careful consideration of how to organize and categorize your data as well as your physical assets. In this chapter, we will take a look at how best to do this. We will discuss the principles on which configuration management systems operate, as well as the significant benefits they provide.

While reading this chapter, it may be useful to remember the Second Law of Thermodynamics, quoted at the beginning: our systems are in fact constantly approaching an increased state of disorder. Let us find out, how configuration management systems can counter this effect and help to restore order...

Danger! Acronym Overload!



The acronym *SCM* may also be used for *Source Control Management*, i.e. the tracking of code changes in a repository. Since we are talking entirely about *Software Configuration Management*, and in an attempt to minimize confusion, we will use the acronym *CM* for both the terms “configuration management” as well as “configuration management systems” throughout this book. When talking about revision control, we will use the acronym (for Version Control System). Admittedly, it doesn't help that often times our CM files are stored in a VCS such as CVS...

7.2 Services, not Single Points of Failure

In many large environments, it used to be common to find at least one or two ancient systems that system administrators were afraid to touch. Often these servers provided a number of critical services, and their configuration was as equal parts custom scripts, undocumented dependencies, combined with some black magic. Making *any* change on such a system required tribal knowledge, manual editing of configuration files, could wreak havoc, and cause significant downtime.

You still find symptoms of this approach to system administration in many organizations, but – necessity being the mother of invention – most organizations nowadays have found ways to make their services slightly more resilient (although certainly no less complex). “Cattle, not pets” is a common phrase expressing this shift in mindset: instead of grooming and coddling individual systems, we should regard any one server as replacable, easy to tear down and recreate on a moment’s notice. Instead of focusing on any individual host, we now begin by defining a *service*, identifying its requirements and then applying the required changes to any suitable hardware system. What used to be a unique, fragile, Single Point of Failure (SPOF) becomes a flexible, easily repeatable process to recreate the functionality provided by any given host.

Consider the example of a single server providing authentication services to your organization. Since it is such a crucial component of the infrastructure, carefully maintained with custom scripts developed over the years we may be averse to changing anything on the host so as not to impact the reliability of the service it provides.

We may provide added availability by installing a failover instance or using a fault-tolerant protocol allowing communication with multiple such hosts, but downtime is eventually unavoidable, and hardware failure may strike at any time. Rebuilding such special “snowflake” systems – a term often used to convey both their uniqueness and fragility – is painful and time consuming. On the other hand, if we have a well-defined procedure to build an authentication server, we can easily replace it at any time with minimal effort.²

²Experience has shown us that *any* process that carries increased risk ought to be automated and performed *frequently*. This may initially seem paradoxical, as our instincts tell us to avoid risk. However, the less frequently we perform a given task, the more likely we are to make mistakes; on the flip side, the more often we perform it, the more likely we

Shifting your perception away from *host* to *service* management allows you to abstract requirements and define behaviour in a scalable manner. This way, fault tolerance improves, since in case of an emergency another host can quickly be bootstrapped into providing the given service in a short amount of time. Hosts become expendable rather than individual, irreplaceable components, that can be put into (or out of) production use through other automated means. Advanced systems that combine system deployment, configuration management and service monitoring react to fluctuations in traffic demands or individual components' uptime by shifting traffic to and from these parts, or they may possibly initiate the instantiation of additional service nodes. This process is sometimes referred to as "Service Orchestration" (more on that in Section 15.2); configuration management is an integral part of such larger system.

7.3 Defining Services and Requirements

System administrators tend to be very practically oriented and are likely to start out setting up a new service by installing the required software to evaluate, tune it, change it, adapt it to the needs of the environment and in this fashion end up with a functional server. If we wish to document this process, so as to allow us to repeat it in the future or possibly to automate it altogether, it is necessary to trace back the decisions made in the process, identify the changes made to the software and its configuration files and codify all of this in a repeatable manner.

This takes discipline and practice. Documenting the steps taken, as discussed in Section 3.3.1, is a good start. We often are able to use this documentation as both a way to double-check our process as well as a template from which to derive instructions for our configuration management system. The tricky part is making explicit the various assumptions we make about the capabilities of the server on which the service is to run. Let us consider a few examples.

are to develop a routine, to automate the task to be completed unattended, a non-event. This is a critically important point, which we will repeat in Chapter 8.

7.3.1 Example Service: Syslog

To illustrate how a service might be defined, let us walk through a simple, yet common example: every organization needs a way to collate, correlate and monitor all sorts of different events, a topic we will discuss in more detail in Chapter 14. A common solution involves the use of a central `loghost`, running the ubiquitous `syslogd(8)` daemon or perhaps one of its more modern variants, such as the `syslog-ng` or `rsyslog` software.

In its simplest setup, the daemon accepts incoming messages over the network via UDP port 514 and writes them to local files with different permissions or ownerships, based on its configuration. In order to be able to accommodate the high volume of messages typically seen by a syslog server, the OS may require a larger network buffer queue than the other systems in the environment. Finally, all the data needs to be stored somewhere, so we require a large file system to be mounted and log files to be periodically compressed and archived.

Using these high-level requirements, we can identify a few configuration steps necessary for this service that may then get translated into a service definition in the CM system’s *Domain Specific Language (DSL)*. As an example, a *Puppet* “manifest” for the *syslog* service might look as shown in Listing 7.1. This description of requirements is of course non-exhaustive, but it suffices to illustrate the general approach we would like to take: all we need is to let the CM system – *puppet*, in this case – take these steps and translate them into the commands to execute on the target host. With that in place, we can easily and reliably bring up a new host to perform the “syslog” service.³

³Note that all of these steps are by and large independent of the particular Unix flavor the CM runs on. By abstracting the individual steps, such as the installation of a package from their implementation (i.e. *how* to invoke the package manager), we gain the flexibility to repeat this as needed in different environments.

```
class syslog {
  include cron
  include logrotate

  package {
    'syslog-ng':
      ensure => latest ,
      require => Service['syslog-ng'];
  }

  service {
    'syslog-ng':
      ensure => running ,
      enable => true;
  }

  file {
    '/etc/syslog-ng/syslog-ng.conf':
      ensure => file ,
      source => 'puppet:///syslog/syslog-ng.conf' ,
      mode => '0644' ,
      owner => 'root' ,
      group => 'root' ,
      require => Package['syslog-ng'] ,
      notify => Service['syslog-ng'];

    '/etc/logrotate.d/syslog-ng':
      ensure => file ,
      source => 'puppet:///syslog/logrotate-syslog-ng' ,
      mode => '0644' ,
      owner => 'root' ,
      group => 'root' ,
      require => Package['logrotate'];
  }
}
```

Listing 7.1: Excerpt of a Puppet “manifest” defining the ‘syslog’ service.

7.3.2 Example Requirements: LDAP Client Configuration

Our “syslog” example illustrated the definition of a single service. Despite our efforts to make this service easy to replicate, we anticipate only a small number of servers to be providing this service. On the other hand, we can also identify requirements that will be applicable to a very large set of hosts, quite possibly to every single host in our environment.

Let us consider the use case of account management in an environment using a central LDAP directory. We need to ensure that every host is configured

to authenticate local access against the central service. Our high-level configuration steps include the installation of the LDAP client package, changes to the authentication module's configuration file to accept (and require) LDAP authentication, and a configuration file pointing to the central LDAP server. Listing 7.2 illustrates the translation of these steps into a *Chef* “recipe”.

As before, all of these steps apply to all different operating systems or OS flavors. What is different about this example is that it may well apply to other hosts, including the previous *syslog* example. It is useful to identify each of the specific cases and define them independently instead of trying to create monolithic definitions for every single host. In particular, we often define a “base” configuration for all of our systems, including default packages, security settings, authentication methods and the like; individual service definitions depend on this base configuration and bring in new requirements applied to only those hosts providing the given service.

That is, system and service definitions are *additive*, and configuration management systems determine and apply the appropriate final union of settings needed for any combination.

```
package "ldap-utils" do
  action :upgrade
end

template "/etc/ldap.conf" do
  source "ldap.conf.erb"
  mode 00644
  owner "root"
  group "root"
end

%w{ account auth password session }.each do |pam|
  cookbook_file "/etc/pam.d/common-#{pam}" do
    source "common-#{pam}"
    mode 00644
    owner "root"
    group "root"
    notifies :restart, resources(:service => "ssh"), :delayed
  end
end
```

Listing 7.2: Excerpt of a Chef “recipe” defining LDAP client authentication configuration. Note the conceptual similarities to the Puppet DSL shown earlier.

7.3.3 CM Requirements

Different CM systems allow you to specify your service requirements in different ways. Due to their particular evolution, choice of programming language, and internal architecture, they differ significantly in detail, but exhibit conceptual similarities. Effectively, each CM system uses its own DSL, and you will have to get used to the proper syntax to express your requirements.

Looking at the previous two examples, we can identify some required concepts in configuration management systems. Generally speaking, the following (OS agnostic) capabilities are required:

Software Installation

The CM needs to be able to install software on the hosts it manages. More specifically, it needs to be able to assure that software of a given version is installed (or perhaps *not* installed). It does not need to duplicate the capabilities of the package management system – rather, it relies on the package manager as a tool to accomplish the desired result.

The system administrator provides a definition of which packages need to be present on the system, optionally specifying the exact version or perhaps simply requesting the “latest” available version. In order to accomplish this, the CM needs to have support for the package manager in use on the target system.

However, as we discussed in Chapter 5, it is important to avoid introducing conflicts if you allow the CM to install the “latest” version of a package, possibly introducing a non-backwards compatible change – keep your configuration files in sync with the software version they target!

Service Management

The CM needs to be able to define which software services are supposed to be running on a given host. A machine functioning as a web server, for example, had better be running an HTTP daemon. In order for some configuration changes to take effect, this daemon may need to be restarted, and in order to make certain other changes, one may need to (temporarily) shut down a service.

As starting, stopping, restarting and generally *supervising* running processes is both software- and OS dependent, the CM may fall back on the

package manager or system provided service management mechanisms, such as `/etc/rc.d` or `/etc/init.d` scripts, as well as more modern frameworks such as Solaris’s “Service Management Facility” or Mac OS X’s `launchd(8)`.

Coordinating service restarts across multiple systems may require additional capabilities or settings within the CM systems. As noted above, CM may develop or integrate with more formal service orchestration functionality across a larger infrastructure.

File Permissions and Ownerships

The CM needs to be able to set file permissions and ownerships. If these are not explicitly defined for a given resource, then most systems will simply use the OS defaults. In the Unix world, this means falling back on the default *umask* for permissions and inheritance of ownership from the parent directory via standard Unix semantics.

It is worth noting that asserting file ownerships has additional implications: the user- and/or group-ID of the given file owner need to be present on the system. Some CMs allow you to also manage user accounts (they may add or remove users), while other systems merely assert the existence of a given account and produce an error if a specified file owner is not present on the host in question.

That is, user management by itself may be performed by the CM directly (that is, the CM systems adds or removes users, adjust their account settings, creates home directories etc.), or it may be handled via a central account management system which the CM system configures the host for. Listing 7.2 illustrates the latter case: Chef configures the host to use LDAP for account management, and does not further concern itself with account creation.

In addition, the distinction between “regular” user accounts and service accounts – see Chapter 6.2 – may further play a role here: a central authentication service such as LDAP may only provide information about “regular” users, and system accounts not included in the base OS may be added by e.g. the package manager. As you can tell, the interactions between all these systems is becoming quite complex.

Installation of static files

The CM needs to be able to install a given, static file on all hosts. This is an obvious requirement: the management of local files lies at the heart of every

CM system, but it is worth identifying a few distinct use cases. Here, we provide a single file that will be identical across all systems. For example, let us assume that you wish to provide a list of SSH host keys as a system-wide `known_hosts` entries under `/etc/ssh/ssh_known_hosts`. The contents of this file will be the same across all of your individual systems.

The CM system ensures that this file will be installed – as provided, with no further modifications – on the hosts. If any local modifications were made since the last time the CM ran, those will be overwritten.

The ability to modify an existing file on the target system may seem like an important requirement for any CM, as this is how we configure our systems manually. However, this approach carries significant complexity: For many different configuration files, it requires an understanding of that file’s syntax, and the risk of conflicts introduced by letting local modifications remain in place.

With our strong preference of simpler solutions over more complex ones, it is a better approach to let the CM completely “own” all the files it manages. That is, define the contents of a file as derived from the target system’s properties (such as hostname, network segment, etc.) and generate a new, static file in a central place.

Generation of host-specific data

The CM needs to be able to install host-specific files. For example, you may have different DNS or Syslog servers available to your servers based on the subnet they are deployed in. Or you may wish to add some information determined at runtime on the system itself. For example, you might want to include the current `uptime(1)` in the file `/etc/motd`.

That is, some of the changes to a given file can be determined in advance by the software, as in the case of the DNS server setting: by knowing the IP address of the host, you know which DNS server to write to `/etc/resolv.conf`. Other changes cannot be known in advance: unless you are logged in on the server in question, you can’t well know the uptime it would report.

To allow the system administrator to define dynamic files with variable sections and actions, the CM needs to provide a templating language as well as a means of expanding these templates either prior to deployment based on certain properties of the host (e.g. the subnet it will reside on) or at execution time on the system itself.

Some systems allow the use of a general purpose programming language in building these templates. This has the advantage of being able to provide great flexibility in data generation. On the other hand, it also opens up room for unneeded complexity and may reduce the readability or maintainability of the templates. The use of a DSL can help avoid common pitfalls and stir the user into the best direction to solve a given problem. “Constraints are friends.” [9]

As a general rule of thumb, it is desirable to have these templates be applied and the resulting files be generated centrally, rather than on the hosts themselves. It is easy to assume that a CM needs to execute within a host’s context in order to take into account that particular system’s full state to apply the correct settings. However, when managing more than just a few hundred hosts it actually becomes reasonable (and less error prone!) to have configuration management dictate the state on the host *completely*. While this requires the CM to have full knowledge of a lot of the target systems’ state, this reduces the probability of any errors or unpredicted events interfering with or changing the state of the host, yielding undesired results.

Nevertheless, it remains a core requirement to be able to generate a host-specific configuration file on the target system, which is why all CM systems do provide this functionality. See Listing 7.3 for an example of a change description that dynamically expands a template on the host in question, conditionally restarting the given service if (and only if!) the resulting file was modified.

Command Execution

The CM needs to be able to run a given command. This is about as generic a requirement as we can define, but at the same time it is both one of the most important as well as one of the most dangerous. In order to perform system configuration, the software needs to run with superuser privileges, so any command it may run could have disastrous consequences (especially when run on every single host in your organization).

The majority of the commands a CM needs to run are well-defined and abstracted within its DSL. That is, we can express the desired outcome without detailed knowledge of the implementation, the commands that are actually executed on the target system. For example, we ensure packages are installed not by running the actual package manager commands, but simply by using the DSL expression, such as e.g. `require => Package['logrotate']`.

```

bundle agent sshd(parameter) {
  files:
    "/tmp/sshd_config.tpl"
      perms    => mog("0600", "root", "root"),
      copy_from => secure_cp("/templates/etc/ssh/sshd_config",
                            "cf-master.example.com");

    "/etc/ssh/sshd_config"
      perms    => mog("0600", "root", "root"),
      create   => true,
      edit_line => expand_template("/tmp/sshd_config.tpl"),
      classes  => if_repaired("restart_sshd");

  commands:
    restart_sshd::
      "/etc/rc.d/sshd restart"
}

```

Listing 7.3: An “agent bundle”, CFEngine’s way to express user defined change descriptions that install an `sshd_config(5)` file by way of copying a template from the configuration master to the local system and expanding it in place before finally restarting `sshd(8)` if necessary.

Still, there will always be cases where we need to run an arbitrary command.⁴ By allowing the system administrator to centrally define commands to execute on groups of hosts, the CM allows for powerful control of large groups of hosts across your entire infrastructure. The more rapidly a change propagates from the central source of truth to all controlled systems, the more impactful this feature becomes. But beware: with this great power does indeed come great responsibility!

Finally, let us note a related, but easily overlooked requirement for the CM in this context: it needs to be able to collect and report back the output of a command it ran. All too often do we need to execute a set of commands to collect some information about (a subset of) our systems. Doing so allows the CM to gather important information about the state of the system as well as to discover important metrics. We’ll get back to this topic in Chapter 14, when we discuss system monitoring and gaining visibility into the state of our systems.

⁴By using the term “arbitrary”, we mean a command that was not previously defined within the configuration management system’s DSL, rather than a “random” command.

7.4 Of States and Sets

All problems in computer science can be solved by another level of indirection.

– David Wheeler

7.4.1 States

In the previous section we talked about making changes to a running system, but upon further consideration, we are not so much interested in *making changes*, as we are in the results, the outcomes of these changes. Some of the changes we have defined may not be necessary on a given host. What we really care about is the current *state* of the system. That is, we want to answer the question of whether the host is configured correctly, and then apply only those changes necessary to get it to that state. The CM's primary goal is therefore *asserting state*; making (optional) changes to a system just happens to be the method by which this is accomplished.

We wish to control the effects of (software) entropy on the systems such that it is consistently brought back into a well-defined and desired state. Throughout its lifetime, a host may then go through a number of distinct states as illustrated in Figure 7.1:

Unconfigured

A host in this state does not have a CM system installed or the installed CM has never run. The most common example of hosts in this state is new hardware that does not yet have an OS installed. Large environments often have pools of new hardware delivered, racked, and set up in their data center, awaiting allocation. Such systems are frequently in this *unconfigured* state.

Configured

The CM has run successfully and applied all required changes for the given system. All required packages are installed, configured properly, and all services on the host are running. The system is ready for production.

In Service

The host has been put into production. That is, it accepts traffic, provides the service for which it was configured, and is relied upon; it is in active use. Technically speaking, this is a subcategory of the “configured” state; a host may be put into service by other systems than the CM – we mentioned the concept of “Service Orchestration – but only a “configured” host may enter this state.

Out of Service

The system has explicitly been taken out of service; it is no longer serving production traffic. Unlike the remaining states, this is a well-defined and known state. The CM is running and may even have placed the system into this state as a reaction to a system or network failure, possibly one outside of

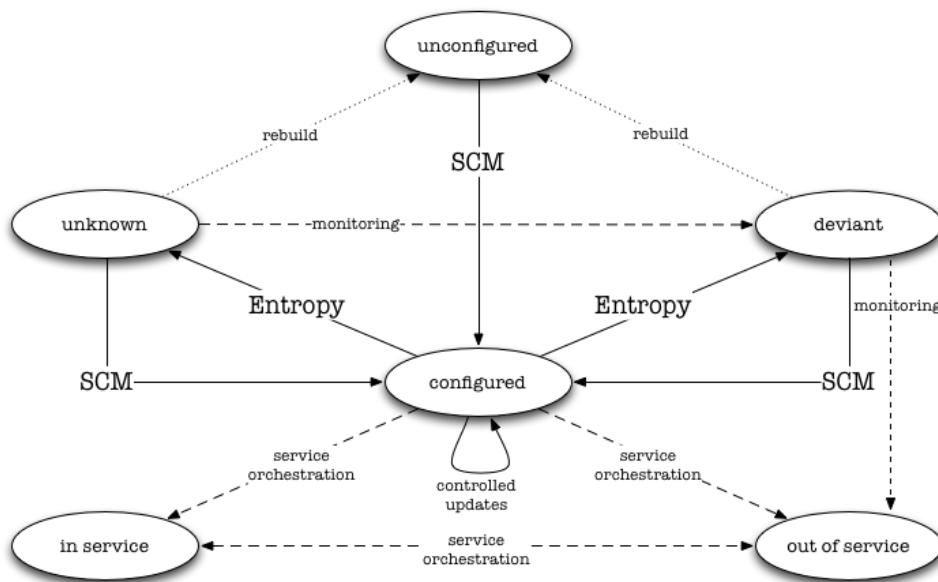


Figure 7.1: Different states a host may be in. The CM tries to counter the effects of Entropy, while Service Orchestration controls e.g. whether a host takes traffic. Monitoring of the systems may allow us to discover an “unknown” state or trigger a removal from service, while rebuilding a host allows us to “start from scratch”.

this host. That is, this state is also a subcategory of the “configured” state. Once again, the host may be taken out of service by another system than the CM.

Deviant

The host is no longer in the desired configuration state. Entropy has taken its toll: changes made to the system either manually or as a side-effect of the traffic it takes, from individual users or possibly even through a mistake in the CM state model itself have caused a faulty configuration. In this case, the configuration management system may need to revert or otherwise correct these changes to revert to the previous state. Storing the rules for the CM in a Version Control System makes such a “roll back” easier.

Unknown

The CM may have stopped running on the host or may erroneously be applying the wrong configuration. The host may have been shut down, the network disconnected, an intruder may have taken over control, or rats may have gnawed through the power cable. We simply don’t know. What’s worse, we may not even know that this host is in an unknown state! Not all failures are immediately obvious.

Describing a service in detail, as we discussed earlier in this chapter, and then applying the required changes to a new host covers the steps to get a system from the “unconfigured” state towards “in service”. This involves a set of well-defined steps, and the system remains in equally well-defined and known states.

Much more challenging for both the CM as well as the system administrators in charge are the prevention and detection of the last two states, “deviant” and “unknown”. In order to recover and return the system back to production, the software needs to be able to identify error conditions and determine the steps to correct them. Automatic recovery from certain failure scenarios is possible, and in fact what we wish for our CM to provide. However, most software solutions can only handle previously defined error scenarios; the nature of our systems inevitably leads to unexpected failure modes. Being able to *detect* such deviant states is by itself a huge win, as we can move from here into the much preferred “out of service” state before

resolving the root cause and finally returning the host back into production. In some cases it may be easier and/or faster to reinstall the host from scratch to bring it into a compliant state.

7.4.2 Sets

Running any CM requires system administrators to create and maintain a complex model of how services are defined, what changes are required to enable or disable a given component, and to keep track of all of your systems in different environments with different requirements. The key to solving this puzzle is to *simplify*: we take a step back and attempt to identify the essential logical components of the system.

In the previous section we have classified the different *states* that our systems may be in, and we have said that the role of a CM is the assertion of a given state. But before we can express the changes required to bring a host into a given state, we need to have defined the role of each system.

Different CMs use different terms in their application of several concepts that we borrow from Set Theory: each solution allows for the grouping of certain resources that can be combined using unions, intersections, set differences, etc. For example, sets of changes or service definitions may be called “manifests”, “promises”, or “recipes”, while sets of hosts may be referred to as “roles”, “node groups”, or they may be defined through the use of “attributes” or “tags”.

I’ve found it useful to remember the visual description of defining these sets as “drawing circles around things”: this is quite literally what developers and system administrators often end up doing on their whiteboards. Looking at these whiteboards or state diagrams immediately conjures the Venn Diagram, an easy way for us to visualize relationships between different groups.

As we define services as a set of changes, or hosts as being grouped together by certain attributes, we can build an inheritance model using further and further abstraction of common properties into subsets. By performing set operations such as unions, intersections and set differences, we gain significant flexibility in determining common and service specific definitions.

Let us take a look at the different kinds of resources we might draw circles around:

Sets of changes

Moving beyond maintenance of a few individual hosts, we realize that changes made on our systems fall, broadly speaking, into two categories: those that need to be applied to *all* systems⁵ (as might be the case illustrated by our LDAP Client Configuration example from Section 7.3.2), and those that need to be applied to only a *subset* of systems, possibly a subset of one. This realization is fundamental: we begin to view system configuration no longer as a task performed on an individual host, but as *defining the changes* that may need to be applied.

In addition, there are changes that are made to all system *in exactly the same way* (e.g. the `/etc/ssh_config` file is updated on all hosts to disable `PasswordAuthentication`) as well as changes that are made taking specific properties of the target environment into account (e.g. the use of a different default route or DNS server depending on the network the system is in). The astute reader will recognize parallels to the four classes of data we identified earlier: “static”, “variable”, “shareable” and “unshareable” (compare Table 5.1).

It is important to be consistent in the application of this model: even a single service running on a single host should be well-defined and explicitly described as such a set – a set of one. This allows us to easily recreate the service in case of emergency, when more resources are added, or when an additional instance of the service is created, for example in a new data center.

Figure 7.2 shows how different change sets can be combined via an inheritance model to help define more complex services.

Sets of hosts

Any host may, at any point in time, perform multiple roles, offer multiple services, or meet multiple requirements. Grouping hosts according to their properties, attributes, or functionality makes it possible to apply the previously identified sets of changes. But groups of hosts are not only defined by the services they provide; you can also categorize hosts by different criteria even within a single service definition. It is common (and good practice) to

⁵Ok, we are cheating a bit here: there rarely are properties applying to absolutely *all* your systems. In System Administration in large scale environments, exceptions are the single universal rule.

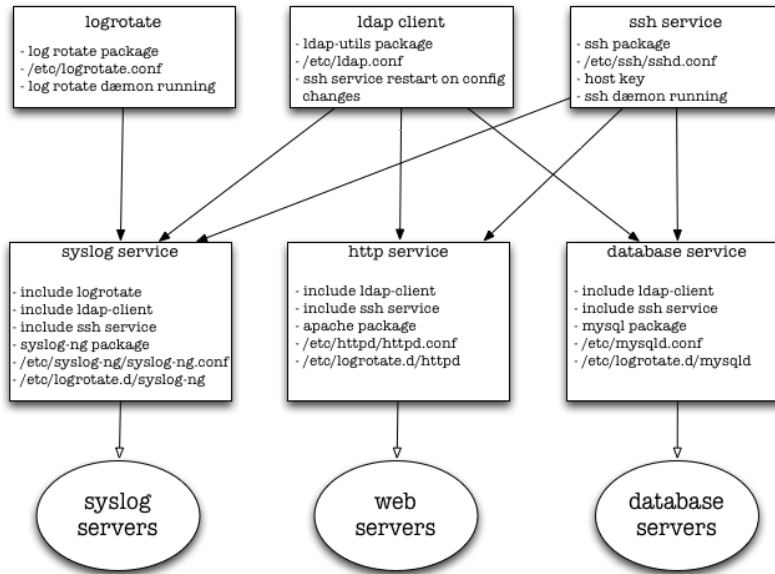


Figure 7.2: An illustration of how abstract change sets help define different services. Common modules are included in more complex definitions before being applied to groups of hosts. Some “base” modules (ssh and ldap in this example) are included on all hosts.

have for each service a small number of hosts – some of which do not take any production traffic – on which to test any changes that we plan on rolling out. Many organizations use the terms “dev” (development), “qa” (quality assurance), “testing”, “staging” or “canary”, and “prod” (production) for the different stages of software development. Likewise, it may be useful to group hosts by geographical location to allow for a carefully staged deployment on a global scale.

Software deployment – an inherently risky business, as we are willfully introducing entropy into a running and stable system – can thus be carefully orchestrated through the use of a CM and clearly defined roles.

In fact, CMs themselves usually allow you to *branch* your changes in the same way that a software development project may track different development efforts before merging changes back into the main line. In order to take advantage of this approach, divide your hosts into sets that are on a different branch: a relative small number of hosts would receive all changes immediately, allowing the system administrators to rapidly test all their changes; a

larger host sample (ideally including a cross section of all possible host group definitions) should follow the “staging” branch to which changes which need to be tested would be deployed. All remaining hosts track the “stable” or “production” branch, receiving changes only after they have gone through the previous stages and found to be without errors.

See Section 7.5.1 for a more detailed description of this approach.

Sets of users

Finally, account management is perhaps the most obvious application of the principles of set theory within configuration management.

As noted in Section 6.3, user accounts may be grouped together by their required access privileges. Regardless of whether user accounts are managed centrally via a directory service or whether individual accounts are explicitly created on each system, the decision to grant access is based on a user’s group membership ; user groups are then mapped to different sets of hosts as previously illustrated in Figure 6.1a.

Note that different users can be simultaneously members of multiple groups. In our previous example, we showed how users in the `wheel` group were given full `sudo(1)` privileges on all hosts, while members of the `dev` group might only get user level access to a small subset of all hosts. These mappings are non-exclusive: a user may well be in both the `dev` and the `wheel` groups at the same time.

7.5 Fighting entropy

Configuration management asserts state. That is, we try to keep a system from deteriorating into an undefined state and to (re-)establish more order. We continuously fight entropy. But we are also introducing change, and the changes we apply may have side-effects. CMs have the potential to completely bring down an entire infrastructure if the wrong kinds of changes are introduced. It is therefore important to look at a few safeguards and techniques that allow us to prevent such disaster scenarios.

7.5.1 Deployment roles

Managing infrastructure code, as it turns out, is not very different from traditional software development. The final product needs to be tested before

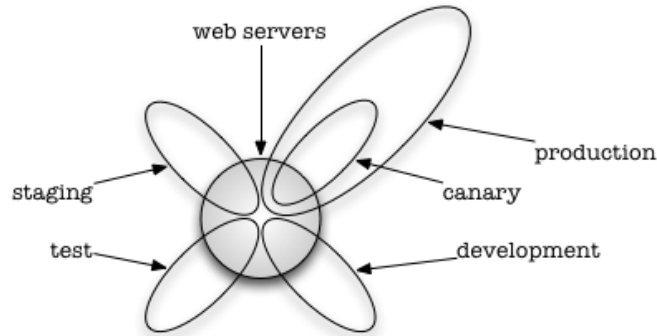


Figure 7.3: An illustration of the different deployment roles a host may be in. Of all hosts in the “web server” group, some are in the “development” environment, some are in the “test” and “staging” environments, and some are serving production traffic. Of those, a small subset performs the role of the “canary”.

it is shipped to the customers. In the context of configuration management, this might be a service definition that has to be verified to not inadvertently break the systems on which it should be deployed, including new releases of the service software.

As a result of this similarity, we usually employ similar strategies and create development, test, and pre-production environments on which to iterate through a series of assertions to ensure the correctness of the installation and configuration. In the previous section we already mentioned the grouping of hosts into these conceptual roles – and the number of stages you require a change to propagate through before it reaches production may depend on the size of your environment – but in general, it is a good idea to have the configuration management development process to include the following deployment roles. As you read through the description of these roles, reference Figure 7.3 for an illustration.

Development

These hosts serve as the playground where all prototypes are initially set up as proofs of concept before being properly packaged and turned into a

defined services. All new changes are initially developed and tested in this environment. Hosts in this role are often in a state of flux, and it is not uncommon for a system administrator to break a service in the process of testing a new configuration management module. For this reason, these systems do not serve production traffic.

Test

A small number of hosts on which to perform end-to-end tests after initial development make up the test environment. Once we have defined a new service, created a new package, or made any other changes to our CM, we let them be applied in this environment. The most important difference to the “development” environment is that *we do not perform any manual changes here*: everything goes through the full configuration management cycle. This allows us to make sure that the module we put together does in fact include all required changes, can be applied by the configuration management software, and does not cause any obvious problems.

In a heterogenous environment it is import to ensure that all major operating system versions are represented in this group.

Pre-Production

Once testing has determined that the changes we plan to roll out do indeed yield the desired state, we can push them into the pre-production environment, sometimes referred to as “staging”. This group consists of a representative sample of all production serving hosts, including different hardware configurations and different operating systems. For each major service, a sample of hosts are placed into this role to ensure compatibility of any new changes within the given software stack.

Systems in this role do not usually take full production traffic, but may be used internally to test your products. In some environments, a small percentage of actual production traffic is shifted to these systems to ensure that all crucial code paths that might be encountered once the change is deployed are executed.

Often times we define automated checks and tests that run against these hosts to ensure no unexpected side effects were introduced by the changes we made.

Production

All hosts serving production traffic or providing a crucial (possibly internal only) service. Any changes made here should have gone through the previous stages, and in some cases may require explicit “change management” practices, including advance notification of all stakeholders, service owners, and customers.

Since this group of systems can range in size from only a handful of hosts (for a particular service) to literally hundreds of thousands of machines (providing multiple services), deployment of any changes is inherently risky and needs to be coordinated carefully. Especially in very large environments these changes are often deployed in a staged manner: starting with a small number of machines the percentage of all hosts that will receive the change is slowly ramped up.

Canary

Sometimes it is difficult to account for all eventualities, and experience has shown that some errors cannot (easily) be reproduced or triggered in a controlled staging environment. This is largely due to the fact that actual production traffic is so difficult to simulate. Hence, it may be a good idea to create a so-called “canary” role as a special method of detecting possible errors in your configuration: individual hosts that are part of the actual production environment and that do take production traffic will get code deployments earlier than the bulk of the production hosts. This way, errors can be detected before they might be deployed everywhere else. Like the canary in the coal mine, these hosts serve as an early warning system for potentially dangerous changes.

Security Roles



Please note that the definitions given here are also helpful in deciding access control as well as traffic flow from a security perspective. For example, hosts in a *development* role may be accessed by all developers, while production systems may not. Similarly, traffic may be allowed from hosts in the “test” role to other hosts in the same role only, but access of production data may be restricted to production systems only.

Even though there is a certain overlap in defining deployment roles and in defining roles related to security, they are not always congruent. While access restrictions may be derived from the deployment model, finer grained control and additional restrictions or definitions are often necessary. Nevertheless, the model of *sets* applies here as well. Only this time, we are, for example, drawing circles around host- and network based ACL and intersecting these security roles with host- and user groups.

7.5.2 Idempotence and Convergence

Configuration management asserts state. To this end, it must reliably produce a defined state without side-effects and needs to be able to run under different circumstances, yet yield the same outcome. If you run your CM on an unconfigured system, it will produce the same end-result as if you run it repeatedly, over and over, in its final, configured state.

Operations that can be performed multiple times yet always produce the same result are called *idempotent*. To illustrate, unary mathematical operations are idempotent if the following definition holds:

$$f(f(x)) \equiv f(x)$$

That is, a function applied twice to any value will produce the same result as if applied only once. A common example here is taking the absolute value of x :

$$|| - 1 || \equiv | - 1 |$$

How does this property translate into practical applications within the scope of configuration management? As we are moving the system from one state to another, we are applying certain changes. Executing these steps must not yield different results depending on the previous system state. Reviewing the required capabilities we identified as CM requirements in Section 7.3.3 – software installation, service management, file permissions and ownerships, installation of static files, generation of host-specific data, and command execution – we find that each may or may not be implemented in a manner that satisfies this requirement. As one example, assertion of an existing file's ownership and permissions, is an inherently idempotent operation: no matter


```

$ cd etc # not idempotent
$ rm resolv.conf # idempotent
$ echo "nameserver 192.168.0.1" > resolv.conf # idempotent
$ echo "nameserver 192.168.0.2" >> resolv.conf # not idempotent
$ chown root:wheel resolv.conf # idempotent
$ chmod 0644 resolv.conf # idempotent

```

Listing 7.4: Idempotent and non-idempotent commands.

how often you execute these commands, and no matter what the permissions and ownership on the file were before, the end result will be the same.

Other typical tasks within configuration management are not quite as obviously idempotent, and some – updating an existing file on a host with parameters determined at runtime, for example – may in fact not be. For any command executed within a configuration management system, you can ask yourself the question of whether or not the outcome will be the same if you either run the command under different circumstances, or if you repeat the command over and over. See Listing 7.4 for a few trivial examples. Note that sometimes a command may behave idempotently only if a special flag is given, and that under some circumstances the only thing that makes a command *not* idempotent may be the exit status. (We will revisit the importance of idempotence within the context of building scalable tools again in Chapter 9.)

In many cases the CM may aid in defining actions in such a manner as to preserve idempotence – *CFEngine*, for example, explicitly discourages the use of free shell commands and leads the user to abstract their requirements into so-called “promises” [10] – but in the end it is up to the system administrator to carefully evaluate the service definitions and change sets she creates and applies to ensure that no side-effects are possible.

Idempotence goes hand in hand with the philosophy of asserting state, rather than making changes. Writing system tools and defining changes that are idempotent takes great care and consideration, especially when one considers the possibility of simultaneous execution of commands or programs outside of our control. The time and effort spent on identifying these and creating a tool that can cope with these factors yield significant benefits: System stability increases as we are able to reliably repeat the same commands without fear or unwanted side-effects.

It is important to note that idempotence does *not* imply that an operation

is *only* performed when it is necessary, only that the *outcome* will remain the same. That is, idempotence does not guarantee efficiency nor necessarily continuous service availability. Consider two systems, one brand new and unconfigured, one already in a desired state, i.e. a production service. In order to get the first system into the state of the second system, the CM needs to make a lot of rather intrusive changes: software packages have to be installed, configuration files updated, and the host may need to be rebooted, possibly multiple times. Performing all of these steps again when the end state would be the same as the current state seems like a bad idea. At best, we'd be wasting CPU cycles; at worst, we'd introduce temporary instability or service downtime.

This is where the concept of *convergence* comes into play: A configuration management system should only perform those operations and apply only those changes that are necessary. Idempotence and Convergence are easily conflated, and within a CM, both are desired properties. But it is important to be aware of the difference:

Consider the `chown(8)` and `chmod(1)` example code from Listing 7.4. Despite being idempotent, running the commands may not be necessary at all if the permissions and ownerships are already as desired. That is, the configuration management system could first test for the desired end-state, and then only execute the steps missing. In this particular example, the difference is negligible, but the practice of checking whether commands actually need to be executed becomes more important when we consider how our system may assert the presence of a certain software package.

That is, if a package of the required version is already installed, the CM (possibly by way of the package manager it invokes) will likely perform a no-op instead of fetching the same package and re-installing it. This is *not* the same as performing the installation again: for example, all too frequently poorly packaged software may overwrite your carefully tuned existing configuration file with a new template or example file. A good package manager, and a carefully written package, may be able to prevent this from happening, but you cannot always rely on this.

Different CMs provide different features, and being able to use them all to your advantage requires practice. In some systems, the responsibility of defining convergent operations is pushed on the system administrator; other CMs go to great lengths to avoid unnecessary changes. Idempotence is crucial for all operations within a CM, but allowing the system to reach the end state in a convergent manner improves stability and reduces the possibility for

service interruptions on the way from state A to state B. Both principles are often fully understood and appreciated only after a lot of practical experience and a perhaps a few “interesting” error scenarios, but try to keep them in mind as you develop and deploy your CM solution.

7.5.3 Quis custodiet ipsos custodes?

The latin phrase “*Quis custodiet ipsos custodes?*” – translated: “Who will guard the guards themselves?” – expresses a fundamental dilemma we encounter when we give full control to any person, government body or, in our case, a piece of software. That is, configuration management asserts state, but what ensures that the configuration management system functions properly?

In fact, CM systems usually control *themselves*. After all, configuration management is a software service just like any other, and needs to be controlled and monitored the same way. This, however, introduces a rather significant risk factor, as changes made to the CM itself have the ability to either wreak havoc across the entire infrastructure or to simply halt any progress if it breaks down.

For this reason, it is important to put in place safeguards and practices to reduce the probability of such errors. The risk of potential disaster is one of the side effects of a high degree of automation. We will discuss this and a number of possible risk mitigating techniques in detail in Chapter 8.

7.6 Even more formal process definitions

Today’s CM systems exhibit a noticeable overlap with concepts discussed in the Information Technology Infrastructure Library (ITIL)[5], a set of practices underlying the first international standard for IT Service Management, ISO/IEC 20000. As a formalized standard trying to cover generally applicable practices, these documents offer a far from thrilling reading experience and have seen limited voluntary adoption in the private sector. The main criticisms are similar to those applied to similar standard documents and regulations (such as the notorious PCI DSS): good intentions and sound general advice is lost amidst lengthy rationale and overly bureaucratic and much too broad definitions.

As perhaps a form of social commentary, one might be further inclined

to seek parallels between modern CM systems and a general Silicon Valley startup culture of rapid invention and quick iteration versus an as “old and stuffy” dismissed IT process represented by the formality of ITIL. As so often, software systems reflect the organizational and cultural hierarchies under which they are developed⁶; most System Administrators with sufficient experience will find some humor in the fact that nevertheless, even these different methodologies become eventually convergent.

That is, despite being easily dismissed as not flexible enough for practical application, many of the recommendations or best practices outlined in ITIL do underly or correlate to the operations of modern CMs. For example, large scale configuration management has evolved to effectively implement or require a repository of all information about the various systems in an organization, the Configuration Management Database (or CMDB). When you read up on this topic, you will hopefully be able to relate those documents to a number of concepts discussed here.

7.7 Summary

We have covered a lot of ground in this chapter, much of it theoretical. The examples shown were taken from some of the more popular configuration management solutions currently in use: CFEngine, Chef, and Puppet. All three implement their own Domain Specific Language, with striking similarities amongst them.

We identified as one crucial concept in configuration management the idea that services are abstracted from the hosts that provide them. This abstraction allows us to define not individual changes, but rather self-contained change sets describing what is required to provide a given functionality. These change sets, in turn, can be applied to groups of hosts; with those sufficiently abstracted and clearly defined, we are able to combine attributes of host groups and describe its members’ final state using set operations. Much like on a white board or the proverbial paper napkin in a restaurant, we draw circles around things. Giving those circles descriptive names, configuration management then becomes a question of creating unions or intersections of service descriptions with host collections.

Using this model, we determined that configuration management is really not about *applying changes*, but about *asserting state*, ensuring that a host

⁶See “Conway’s Law”, derived from [16].

meets a certain set of criteria. We have looked at the functional requirements any CM needs to provide in order to yield a desired state as well as the essential concepts of idempotence and convergence: all changes we make must have well-defined and predictable outcomes that do not change if applied repeatedly; at the same time, we only want to perform those changes that are necessary.

When building our infrastructure we face a choice between a custom, home-grown system that integrates perfectly with other system components, and deploying an “Off The Shelf” solution. Many commercial products exist that promise to manage all of your systems with ease. Some of them offer free versions; some systems are available as open source software, while others are closed.

Knowing our infrastructure needs inside and out, we often fall into the trap of writing our own solutions. In small environments, the benefits of a complex product do not seem worth the cost of adapting our infrastructure to abide by the product’s configuration model. It is for this reason that every growing company inevitably undergoes a phase during which large parts of the initial infrastructure are ripped out and replaced by more scalable solutions – including a mature configuration management system.

In very large environments, on the other hand, our requirements are so unique as to not likely to be matched trivially by any available solution; we will need to write a significant amount of “glue” code around the product anyway – why not just implement our own system? But therein lies a frequent fallacy: as any software engineer knows, the best code is the one we do not have to write ourselves.

Fortunately, development on a number of flexible CMs has yielded several viable solutions for almost any scale. A small environment benefits from the rigorous structure imposed by a mature configuration management system able to grow with the infrastructure; in large environments, it is useful to be able to rely on a proven technology and focus on the end point integration with other systems.

The area of configuration management has become one of the most important fields in large scale system administration and has opened up room for a lot of interesting research. As this chapter hints at, there is significant overlap between configuration management, software provisioning, and the many related tasks in ensuring reliable service availability. All of these moving parts are sometimes referred to as “Service Orchestration”, by now

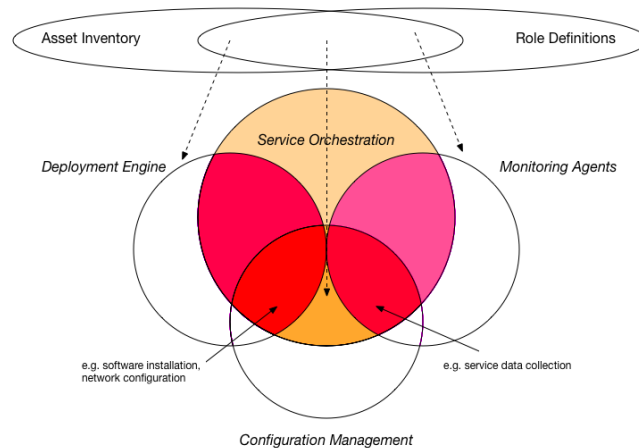


Figure 7.4: Configuration Management overlaps and intersects several other areas of System Administration, many of which depend on a central asset database and comprehensive service definitions.

its own field of research covering the theory of how complex systems fail, in how far we can achieve automatic recovery or guarantee service availability, and the concept of autonomous state configuration across large scale deployments with literally hundreds of thousands of hosts. See Figure 7.4 for an illustration of these relationships.

As so often, we can only focus on the fundamental concepts with just enough references to more advanced topics to entice the reader to continue their research. We will revisit some of these topics in section 15.2, when we try to catch up on missed topics and tie together some of our loose ends.

Throughout this chapter, we have focused primarily on configuration management of host-type systems. But our infrastructure consists of more than just “hosts”: we have large amounts of network equipment as well as a number of appliances that sit somewhere in between the traditional networking gear and a “normal” host: we have routers and switches, load balancers and firewalls, storage devices and intrusion detection systems... the list goes on. All of these devices *also* require configuration management, and it is unfortunate that integrating them into your existing CM is often difficult, if not impossible.

Our approach to divide resources into grouped sets and describe changes

as service definitions does in fact translate to non-host systems as well. All we need is for a programmatic method to access them – ideally, though not necessarily via a programmable interface such as a well-documented API – and we can add support for them to our CM. A positive development in recent years has lead some of the configuration management tools we mentioned to now allow you to manage at least some non-host type systems, even though we are still a ways from the same level of control.

The fundamental value configuration management provides as we move from individual systems to easily replicated services is perhaps best summarized by this quote:

“The test we use when designing infrastructures is ”Can I grab a random machine that’s never been backed up and throw it out the tenth-floor window without losing sysadmin work?” If the answer to this was ”yes”, then we knew we were doing things right.” [15]

Granted, one would hope that people entering your datacenter and throwing machines out of the window is not a regular event. But Murphy’s famous law – commonly cited as “Anything that can go wrong, will go wrong.” – acts as viciously, and we must view software failure as the functional equivalent. All software has bugs, and it is only a question of time until your complex service encounters a fatal error. Similarly, hardware fails as well – and not too infrequently. This becomes painfully obvious in very large environments with hundreds of thousands of machines, as the probability of encountering a hardware failure increases proportionally to the number of hosts in service. “One in a million is next Tuesday.” [17]

With properly defined services, correctly grouped hosts, and a well running CM individual hosts do become expendable. Any system-, software-, or hardware failure has significantly reduced impact on our overall service availability. In other words: configuration management lies at the heart of any well-managed infrastructure and makes large scale deployments ultimately maintainable.

Problems and Exercises

Problems

1. Review your own environment, your infrastructure, and your essential services. Do you think they could be rebuilt from scratch? With how much effort? Which components seem completely and easily replaceable, and which would you fear most to lose?
2. Identify the configuration management system currently in use on the systems you have access to. Can you determine which components or services are controlled by the CM in question and which resources are not? Contact your system administrator and ask her about details.
3. Review the documentation for one of the popular CMs. Most of them can quickly and easily be tried out using just a few virtual machines. Set up a CM and try to define a simple service. How does this system implement the features and concepts we discussed?
4. Pick a popular service provided in your environment – for example a DNS-, web- or file server – and create a complete service definition for it. Make sure to identify the smaller required modules this service relies on. How far does it make sense to abstract the individual components?
5. When deploying a new service, identify the different categories into which each step falls. Is software installation sufficiently covered by executing the right commands using your package manager? Do additional files need to be created or existing configuration files modified? Does the configuration file differ from host to host within a service group?

6. Review how your existing package management system handles reinstallation of a package of either the same or a different version. How are configuration files handled? Are these actions idempotent?
7. Consider the agent bundle shown in Listing 7.3. What kind of parameters in the `sshd_config` file would you expect to be expanded when this code is executed? Using CFEngine’s online documentation, create a suitable template.
8. Review the commands shown in Listing 7.4. Do you agree with their classification as being idempotent or not? Try to argue for or against their classification.
9. Consider the command “`mv this there`” – under what circumstances is this particular invocation idempotent? Is it ever? What, if any, checks or changes can you add to a script that includes this command to ensure the outcome *is* idempotent?
10. A common test of a new CM consists of updating the `/etc/motd` file with information from the running host. This operation incurs a very small risk, as no application relies on this file, yet it can easily show that the system is running and operating properly.

Create a script or command to update the `/etc/motd` file on a system to include the hostname of the system, the time since the host was last rebooted, and the time this script was last executed. Can you translate this script into a template in the DSL of your configuration management system?
11. Review the different states your systems may go through. How do you currently define a properly operating host? How would you go about identifying a *deviant* host?
12. Every System Administrator has a virtual tool chest full of scripts, commands, and utilities used during the configuration and maintenance of their systems. Review your peers’ tools as well as your own and identify in how far they assure *idempotence* or *convergence*. Compare these to the common tools provided by your Unix systems (such as the scripts found under `/etc/rc.d` or `/etc/init.d`) or shipped with a given software package.

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