### Table of Contents

1. About this Guide
   1.1. Other sources of information ........................................ 2

2. Creating a new Switch via a Template
   2.1. Using web admin .................................................. 3
   2.2. Using CLI ......................................................... 3
   2.3. Required Parameters ............................................. 3
   2.4. RADIUS scope Parameters ...................................... 3
   2.5. Additional parameters ........................................... 4
   2.6. Comments .................................................................. 4
   2.7. Defining RADIUS Attributes .................................... 4
   2.8. Dynamic RADIUS Attribute Value Syntax ..................... 4

3. Documentation ................................................................... 15

4. Asciidoctor documentation
   4.1. Documentation Conventions ....................................... 16
   4.2. Checklist to create a new guide .................................. 21

5. Golang environment
   5.1. PacketFence Golang libraries .................................... 22

6. Code conventions
   6.1. Code style .................................................................. 26

7. HTTP JSON API
   7.1. How to use the API ................................................. 28

8. Customizing PacketFence
   8.1. Captive Portal ...................................................... 30
   8.2. Adding custom fields to the database ......................... 32
   8.3. VLAN assignment .................................................. 32

9. SNMP
   9.1. Introduction ......................................................... 34
   9.2. Obtaining switch and port information ....................... 34

10. Supporting new network hardware
    10.1. Switch ................................................................ 35
    10.2. Wireless Access-Points or Controllers ..................... 38
    10.3. The "adding a new network device module in PacketFence" checklist ................................................. 40

11. PacketFence builds
    11.1. Packer .................................................................. 41
    11.2. Anatomy of Packer template .................................. 41
    11.3. How to build Docker images? .................................. 41
    11.4. Troubleshooting .................................................. 42

12. Developer recipes
    12.1. Virtual environment .............................................. 43
    12.2. Running development version .................................. 44

13. Running tests
    13.1. Unit tests ............................................................ 46
    13.2. Integration tests .................................................. 47

14. Contributing
    14.1. Creating patches .................................................. 54
    14.2. Translations ....................................................... 54
1. About this Guide

This guide will help you modifying PacketFence to your particular needs. It also contains information on how to add support for new switches.

The latest version of this guide is available at https://packetfence.org/documentation/.

1.1. Other sources of information

**Clustering Guide**
- Covers installation in a clustered environment.

**Installation Guide**
- Covers installation and configuration of PacketFence.

**Network Devices Configuration Guide**
- Covers switches, WiFi controllers and access points configuration.

**Upgrade Guide**
- Covers compatibility related changes, manual instructions and general notes about upgrading.
  - PacketFence News Covers noteworthy features, improvements and bug fixes by release.

These files are included in the package and release tarballs.
2. Creating a new Switch via a Template

2.1. Using web admin

You can directly create or edit switch templates in Configuration → Integration → Switch Templates menu.

2.2. Using CLI

To create a new Switch Template you must create a template file in the /usr/local/pf/lib/pf/Switch directory. The file must have the following pattern

```
/usr/local/pf/lib/pf/Switch/<Vendor>/<SwitchName>.def
```

For example to create a template for the vendor Cyberdyne and switch Switchinator 800. The file name is /usr/local/pf/lib/pf/Switch/Cyberdyne/Switchinator800.def The file name must must only consist of alphanumeric characters and underscores and must begin with a letter.

Once you have completed your switch template, you will need to perform the following commands so it can be used:

```
/usr/local/pf/addons/dev-helpers/bin/generator-template-switches-defaults.pl
/usr/local/pf/bin/pfcmd configreload hard
/usr/local/pf/bin/pfcmd service pf restart
```

The file consist of parameter names and their values. There is no sections but RADIUS scope parameters act like this.

No scopes are inherited from a base switch template, you need to define each scope you want to use.

You can find a full working example below. Other examples are available in /usr/local/pf/lib/pf/Switch/ folder.

2.3. Required Parameters

- description - The description of the switch.
- radiusDisconnect - The RADIUS disconnect methods to use. Must be one of the following values coa|disconnect|coaOrDisconnect.

2.4. RADIUS scope Parameters

- acceptVlan - Attributes for accept vlan scope
- acceptRole - Attributes for accept role scope.
• reject - Attributes for rejection scope.
• disconnect - Attributes for disconnect scope (required if radiusDisconnect is 'disconnect' or 'coaOrDisconnect')
• coa - Attributes for CoA scope (required if radiusDisconnect is 'coa' or 'coaOrDisconnect')
• voip - Attributes for VOIP scope (If VOIP is enabled)
• bounce - Attributes for bounce scope

2.5. Additional parameters

• snmpDisconnect - If SNMP protocol should be use to disconnect (values: enabled or disabled)

2.6. Comments

The line of a comment must begin with a '#' For example:

# This is a comment

2.7. Defining RADIUS Attributes

```
scopeName = <<EOT
  Attribute-Name1 = value1
  Attribute-Name2 = value2
EOT
```

2.8. Dynamic RADIUS Attribute Value Syntax

Some values depends on the context of the current request. So here is mini templating language
to format values.

• Text replacement: $name
• Embedded text replacement: start-$name-end
• Functions: ${f1("",$var, f2())}

2.8.1. Available variables for RADIUS scope

• acceptRole - (Same as acceptVlan)
• reject - (Same as acceptVlan)
• acceptVlan
  ◦ autoreg
  ◦ connection_sub_type
  ◦ connection_type
- eap_type
- fingerbank_info.device_name
- fingerbank_info.device fq
- fingerbank_info.device_hierarchy_names
- fingerbank_info.device_hierarchy_ids
- fingerbank_info.score
- fingerbank_info.version
- fingerbank_info.mobile
- ifDesc
- ifIndex
- isPhone
- last_accounting.acctsessionid
- last_accounting.username
- locationlog.connection_sub_type
- locationlog.connection_type
- locationlog.dot1x_username
- locationlog.end_time
- locationlog.ifDesc
- locationlog.mac
- locationlog.port
- locationlog.realm
- locationlog.role
- locationlog.session_id
- locationlog.ssid
- locationlog.start_time
- locationlog.stripped_user_name
- locationlog.switch
- locationlog.switch_ip
- locationlog.switch_ip_int
- locationlog.switch_mac
- locationlog.vlan
- locationlog.voip
- mac
- nas_port_id
- nas_port_type
- node_info.autoreg
- node_info.status
- node_info.bypass_vlan
- node_info.bandwidth_balance
- node_info.regdate
- node_info.bypass_role
- node_info.device_class
- node_info.device_type
- node_info.device_version
- node_info.device_score
- node_info.pid
- node_info.machine_account
- node_info.category
- node_info.mac
- node_info.last_arp
- node_info.lastskip
- node_info.last_dhcp
- node_info.user_agent
- node_info.computername
- node_info.dhcp_fingerprint
- node_info.detect_date
- node_info.voip
- node_info.notes
- node_info.time_balance
- node_info.sessionid
- node_info.dhcp_vendor
- profile._access_registration_when_registered
- profile._always_use_redirecturl
- profile._autoregister
- profile._block_interval
- profile._description
- profile._dot1x_recompute_role_from_portal
- profile._dot1x_unset_on_unmatch
- profile._dpsk
- profile._locale
- profile._network_logoff
- profile._network_logoff_popup
- profile._preregistration
- profile._redirecturl
- profile._reuse_dot1x_credentials
- profile._root_module
- profile._self_service
- profile._sms_pin_retry_limit
- profile._sms_request_limit
- profile._status
- profile._unreg_on_acct_stop
- profile._vlan_pool_technique
- radius_request.<Radius Attribute Name>
- realm
- session_id
- source_ip
- ssid
- stripped_user_name
- switch._ExternalPortalEnforcement
- switch._RoleMap
- switch._VpnMap
- switch._SNMPAuthPasswordRead
- switch._SNMPAuthPasswordTrap
- switch._SNMPAuthPasswordWrite
- switch._SNMPAuthProtocolRead
- switch._SNMPAuthProtocolTrap
- switch._SNMPAuthProtocolWrite
- switch._SNMPCommunityRead
- switch._SNMPCommunityTrap
- switch._SNMPCommunityWrite
- switch._SNMPEngineID
- switch._SNMPPrivPasswordRead
- switch._SNMPPrivPasswordTrap
- switch._SNMPPrivPasswordWrite
- switch._SNMPPrivProtocolRead
- switch._SNMPPrivProtocolTrap
- switch._SNMPPrivProtocolWrite
- switch._SNMPPUserNameRead
- switch._SNMPPUserNameTrap
- switch._SNMPPUserNameWrite
- switch._SNMPVersion
• switch_SNMPVersionTrap
• switch_TenantId
• switch_UrlMap
• switch_VlanMap
• switch_VoIPEnabled
• switch_cliEnablePwd
• switch_cliPwd
• switch_cliTransport
• switch_cliUser
• switch_coaPort
• switch_controllerIp
• switch_deauthMethod
• switch_disconnectPort
• switch_id
• switch_inlineTrigger
• switch_ip
• switch_macSearchesMaxNb
• switch_macSearchesSleepInterval
• switch_mode
• switch_roles
• switch_switchIp
• switch_switchMac
• switch_uplink
• switch_useCoA
• switch_vlans
• switch_wsPwd
• switch_wsTransport
• switch_wsUser
• switch_ip
• switch_mac
• time
• user_name
• user_role
• vlan
• wasInline
• coa
  • last_accounting.acctsSessionId
  • last_accounting.username
* mac
* locationlog.connection_sub_type
* locationlog.connection_type
* locationlog.dot1x_username
* locationlog.end_time
* locationlog.ifDesc
* locationlog.mac
* locationlog.port
* locationlog.realm
* locationlog.role
* locationlog.session_id
* locationlog.ssid
* locationlog.start_time
* locationlog.stripped_user_name
* locationlog.switch
* locationlog.switch_ip
* locationlog.switch_ip_int
* locationlog.switch_mac
* locationlog.vlan
* locationlog.voip
* role

* disconnect
  * disconnectIp
  * last_accounting.acctsessionid
  * last_accounting.username
  * locationlog.connection_sub_type
  * locationlog.connection_type
  * locationlog.dot1x_username
  * locationlog.end_time
  * locationlog.ifDesc
  * locationlog.mac
  * locationlog.port
  * locationlog.realm
  * locationlog.role
  * locationlog.session_id
  * locationlog.ssid
  * locationlog.start_time
  * locationlog.stripped_user_name
• locationlog.switch
• locationlog.switch_ip
• locationlog.switch_ip_int
• locationlog.switch_mac
• locationlog.vlan
• locationlog.voip
• mac

• voip
  • switch._ExternalPortalEnforcement
  • switch._RoleMap
  • switch._VpnMap
  • switch._SNMPAuthPasswordRead
  • switch._SNMPAuthPasswordTrap
  • switch._SNMPAuthPasswordWrite
  • switch._SNMPAuthProtocolRead
  • switch._SNMPAuthProtocolTrap
  • switch._SNMPAuthProtocolWrite
  • switch._SNMPCommunityRead
  • switch._SNMPCommunityTrap
  • switch._SNMPCommunityWrite
  • switch._SNMPEngineID
  • switch._SNMPPrivPasswordRead
  • switch._SNMPPrivPasswordTrap
  • switch._SNMPPrivPasswordWrite
  • switch._SNMPPrivProtocolRead
  • switch._SNMPPrivProtocolTrap
  • switch._SNMPPrivProtocolWrite
  • switch._SNMPUserNameRead
  • switch._SNMPUserNameTrap
  • switch._SNMPUserNameWrite
  • switch._SNMPVersion
  • switch._SNMPVersionTrap
  • switch._TenantId
  • switch._UrlMap
  • switch._VlanMap
  • switch._VoIPEnabled
  • switch._cliEnablePw
  • switch._cliPwd
- switch._cliTransport
- switch._cliUser
- switch._coaPort
- switch._controllerIp
- switch._deauthMethod
- switch._disconnectPort
- switch._id
- switch._inlineTrigger
- switch._ip
- switch._macSearchesMaxNb
- switch._macSearchesSleepInterval
- switch._mode
- switch._roles
- switch._switchIp
- switch._switchMac
- switch._uplink
- switch._useCoA
- switch._vlans
- switch._wsPwd
- switch._wsTransport
- switch._wsUser
- vlan
- bounce
  - disconnectIp
  - ifIndex
  - last_accounting.acctsSessionId
  - last_accounting.username
  - locationlog.connection_sub_type
  - locationlog.connection_type
  - locationlog.dot1x_username
  - locationlog.end_time
  - locationlog.ifDesc
  - locationlog.mac
  - locationlog.port
  - locationlog.realm
  - locationlog.role
  - locationlog.session_id
  - locationlog.ssid
• locationlog.start_time
• locationlog.stripped_user_name
• locationlog.switch
• locationlog.switch_ip
• locationlog.switch_ip_int
• locationlog.switch_mac
• locationlog.vlan
• locationlog.voip
• mac
• switch._cliEnablePwd
• switch._cliPwd
• switch._cliTransport
• switch._cliUser
• switch._coaPort
• switch._controllerIp
• switch._deauthMethod
• switch._disconnectPort
• switch._ExternalPortalEnforcement
• switch._id
• switch._inlineTrigger
• switch._ip
• switch._macSearchesMaxNb
• switch._macSearchesSleepInterval
• switch._mode
• switch._RoleMap
• switch._VpnMap
• switch._roles
• switch._SNMPAuthPasswordRead
• switch._SNMPAuthPasswordTrap
• switch._SNMPAuthPasswordWrite
• switch._SNMPAuthProtocolRead
• switch._SNMPAuthProtocolTrap
• switch._SNMPAuthProtocolWrite
• switch._SNMPCommunityRead
• switch._SNMPCommunityTrap
• switch._SNMPCommunityWrite
• switch._SNMPEngineID
• switch._SNMPPrivPasswordRead
• switch._SNMPPrivPasswordTrap
• switch._SNMPPrivPasswordWrite
• switch._SNMPPrivProtocolRead
• switch._SNMPPrivProtocolTrap
• switch._SNMPPrivProtocolWrite
• switch._SNMPUserNameRead
• switch._SNMPUserNameTrap
• switch._SNMPUserNameWrite
• switch._SNMPVersion
• switch._SNMPVersionTrap
• switch._switchIp
• switch._switchMac
• switch._TenantId
• switch._uplink
• switch._UrlMap
• switch._useCoA
• switch._VlanMap
• switch._vlans
• switch._VoIPEnabled
• switch._wsPwd
• switch._wsTransport
• switch._wsUser

2.8.2. Available functions

• macToEUI48($mac) - format a mac to AA-BB-CC-DD-FF-EE format
• uc($string) - uppercases a string
• lc($string) - lowercases a string
• log($string) - log a message to the log
• substr($str, $offset, $len) - Extracts a substring from a string
• split($sep, $str) - Split a string by a seperator.
• join($sep, $a, $b, ..) - Join a list of string with a seperator.
• replace($str, $old, $new) - Replace the old string with a new string.

2.8.3. Full Working Example
description = The Switchinator 800
radiusDisconnect = disconnect

acceptVlan = <<EOT
Tunnel-Medium-Type = 6
Tunnel-Type = 13
Tunnel-Private-Group-Id = $vlan
EOT

acceptRole = <<EOT
Filter-Id = $role
EOT

reject = <<EOT
Reply-Message = Hasta la vista, baby.
EOT

disconnect = <<EOT
Calling-Station-Id= ${macToEUI48($mac)}
NAS-IP-Address = $disconnectIp
EOT

coa = <<EOT
Calling-Station-Id= ${macToEUI48($mac)}
NAS-IP-Address = $disconnectIp
Filter-Id = $role
EOT

bounce= <<EOT
Cisco-AVPair = subscriber:command=bounce-host-port
Acct-Session-Id = $last_accounting.acctsessionid
EOT
3. Documentation

The in-depth or more technical documentation is always as close to the code as possible. Always look at the POD doc[^1]. To do so, the preferred way is using the `perldoc` command as follows:

```
perldoc lib/pfconfig/cached.pm
```

[^1]: Perl's Plain Old Documentation: [http://perldoc.perl.org/perlpod.html](http://perldoc.perl.org/perlpod.html)
4. Asciidoctor documentation

4.1. Documentation Conventions

4.1.1. Shell commands in code blocks

To ease copy-paste of shell commands:

- Remove useless characters in code blocks like # or $
- Split long lines with \

4.1.2. Titles

We use Asciidoctor tags for section titles (headings) in place of AsciiDoc tags, see table below for equivalence:

<table>
<thead>
<tr>
<th>Level</th>
<th>AsciiDoc syntax (old)</th>
<th>Asciidoctor syntax (new)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 0 (Document title)</td>
<td>=========</td>
<td>=</td>
</tr>
<tr>
<td>Level 1</td>
<td>=========</td>
<td>==</td>
</tr>
<tr>
<td>Level 2</td>
<td>=~</td>
<td>===</td>
</tr>
<tr>
<td>Level 3</td>
<td>^^^</td>
<td>====</td>
</tr>
<tr>
<td>Level 4</td>
<td>+</td>
<td>=========</td>
</tr>
</tbody>
</table>

4.1.3. Other Conventions

\* (asterisk) for important vocabulary. Ex: *This Part* is important

_ (underscore) for menus. Ex: _Configuration → Policies and Access Control → Connection Profile → Profile Name_

backquotes ` for buttons. Ex: Click on `Save`

4.1.4. Inter-document cross references

We use inter-document cross references feature to make links between all PacketFence guides. When we need to link to a specific section of a document, we use automatic anchors feature to have a correct display in PDF.

4.1.5. List of Asciidoctor tags used

Source: AsciiDoc Mark-up Quick Reference for Red Hat Documentation
NOTE

Some markup examples used in this overview are based on new Asciidoctor features and they are not a part of the standard set of elements. Please, use the :experimental: tag in the header of your document to enable this functionality.

<table>
<thead>
<tr>
<th>Element</th>
<th>Mark-up</th>
<th>Example rendered output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application name</td>
<td>No special markup</td>
<td>The foo application.</td>
</tr>
</tbody>
</table>
| Code blocks      | [source,golang] ----
|                  | package main
|                  | import "fmt"
|                  | func main()
|                  |   fmt.Println("Hello World!")
|                  | ----
|                  | package main
|                  | import "fmt"
|                  | func main()
|                  |   fmt.Println("Hello World!")
|                  | }
|                  | ----
|                  | print("Hello, World!")
| Code - inline    | `print("Hello, World!")`
| Command block    | ----
|                  | $ echo "Hello, World!" > hello.txt
|                  | ----
|                  | $ echo "Hello, World!" > hello.txt
| Command - inline | Use the [command]`oc get`
|                  | command to get a list of services.
<p>| Emphasis for a term | Use <em>this</em> approach.                                            | Use this approach.     |</p>
<table>
<thead>
<tr>
<th>Element</th>
<th>Mark-up</th>
<th>Example rendered output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filenames or directory paths</td>
<td>Edit the <code>pf.conf</code> file as required and save your changes. The <code>networks.conf</code> configuration file is located in the <code>/usr/local/pf/</code> directory.</td>
<td>Edit the <code>pf.conf</code> file as required and save your changes. The <code>networks.conf</code> configuration file is located in the <code>/usr/local/pf/</code> directory.</td>
</tr>
<tr>
<td>GUI Text</td>
<td>The web browser displays <em>404</em> for an unreachable URL.</td>
<td>The web browser displays 404 for an unreachable URL.</td>
</tr>
<tr>
<td>GUI Button (experimental feature, Asciidoctor only)</td>
<td>Click btn:[Save As] to save the file under a different name.</td>
<td>Click btn:[Save As] to save the file under a different name.</td>
</tr>
<tr>
<td>GUI button and menu (non-experimental)</td>
<td>Navigate to Configuration <em>-&gt; Policies and Access Control</em></td>
<td>Navigate to Configuration <em>-&gt; Policies and Access Control</em></td>
</tr>
<tr>
<td>Element</td>
<td>Mark-up</td>
<td>Example rendered output</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Inline Image</td>
<td>image::pf-logo.png[width=25px]</td>
<td></td>
</tr>
<tr>
<td>Block Image</td>
<td>.PacketFence image::pf-logo.png[width=25px]</td>
<td>Figure 1. PacketFence</td>
</tr>
<tr>
<td>Inline operations and user input</td>
<td>The ‘GET’ operation can be used to do something.</td>
<td>The GET operation can be used to do something. Answer by typing Yes or No when prompted.</td>
</tr>
<tr>
<td></td>
<td>Answer by typing ‘Yes’ or ‘No’ when prompted.</td>
<td></td>
</tr>
<tr>
<td>Keyboard shortcuts</td>
<td>kbd:[Ctrl+Alt+Del]</td>
<td>kbd:[Ctrl+Alt+Del]</td>
</tr>
<tr>
<td>(experimental feature, Asciidoctor only)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Link (external)</td>
<td>link:<a href="http://www.packetfence.org%5BPacketFence">http://www.packetfence.org[PacketFence</a>]</td>
<td>PacketFence</td>
</tr>
<tr>
<td>Element</td>
<td>Mark-up</td>
<td>Example rendered output</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------------------------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Lists</td>
<td><strong>.Ordered list</strong></td>
<td><strong>Ordered list</strong></td>
</tr>
<tr>
<td></td>
<td><strong>. First item</strong></td>
<td>1. First item</td>
</tr>
<tr>
<td></td>
<td><strong>. Second item</strong></td>
<td>2. Second item</td>
</tr>
<tr>
<td></td>
<td><strong>. Third item</strong></td>
<td>3. Third item</td>
</tr>
<tr>
<td></td>
<td><strong>.Unordered list</strong></td>
<td><strong>Unordered list</strong></td>
</tr>
<tr>
<td></td>
<td><strong>• This</strong></td>
<td>• This</td>
</tr>
<tr>
<td></td>
<td><strong>• That</strong></td>
<td>• That</td>
</tr>
<tr>
<td></td>
<td><strong>• The other</strong></td>
<td>• The other</td>
</tr>
<tr>
<td></td>
<td><strong>.Definition or labeled list</strong></td>
<td><strong>Definition or labeled list</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Term A: description</strong></td>
<td><strong>Term A</strong> description</td>
</tr>
<tr>
<td></td>
<td><strong>Term B: description</strong></td>
<td><strong>Term B</strong> description</td>
</tr>
<tr>
<td></td>
<td><strong>.Checklist</strong></td>
<td><strong>Checklist</strong></td>
</tr>
<tr>
<td></td>
<td><strong>[ ] first step</strong></td>
<td>☑ first step</td>
</tr>
<tr>
<td></td>
<td><strong>[ ] first task</strong></td>
<td>☑ first task</td>
</tr>
<tr>
<td></td>
<td><strong>[ ] second task</strong></td>
<td>☑ second task</td>
</tr>
<tr>
<td></td>
<td><strong>[ ] second step</strong></td>
<td>☑ second step</td>
</tr>
<tr>
<td></td>
<td><strong>[ ] third step</strong></td>
<td>☑ third step</td>
</tr>
<tr>
<td></td>
<td><strong>Literal value</strong></td>
<td>The function returns <strong>true</strong>. The function returns <strong>true</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Element</th>
<th>Mark-up</th>
<th>Example rendered output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Package</td>
<td><strong>Install the [package]`packetfence` package.</strong></td>
<td><strong>Install the packetfence package.</strong></td>
</tr>
<tr>
<td>Product name</td>
<td><strong>No special markup. Use {nbsp} in the company and product names. Example: Inverse{nbsp}Inc.</strong></td>
<td><strong>Inverse Inc.</strong></td>
</tr>
</tbody>
</table>
### Element | Mark-up | Example rendered output
--- | --- | ---
Reference to PacketFence guides | See the PacketFence link:guide-url[@Installation Guide] for more information. | See the PacketFence Installation Guide for more information.
System or software variable to be replaced by the user | Use the following command to roll back a deployment, specifying the deployment name: `oc rollback _deployment_`. | Use the following command to roll back a deployment, specifying the deployment name: `oc rollback deployment`.
System or software configuration parameter or environment variable | Use the `_IP_ADDRESS_` environment variable for the server IP address. | Use the `IP_ADDRESS` environment variable for the server IP address.
System item, daemon, or service | Include the `pf::Switch` library. Stop the `pfqueue` daemon. Start the `iptables` service. | Include the `pf::Switch` library. Stop the `pfqueue` daemon. Start the `packetfence-iptables` service.

### 4.2. Checklist to create a new guide

- create PacketFence_GUIDENAME.asciidoc based on PacketFence Template Guide
- update all target in Makefile
- update packaging (if necessary)
- update website listing to add a new guide
5. Golang environment

5.1. PacketFence Golang libraries

5.1.1. Basic setup

This is a guide on how to setup/use the PacketFence Golang libraries.

In order to bootstrap your environment:

```bash
cd /usr/local/pf/go
make go-env
```

If you work directly on sources, you can run:

```bash
cd go
GO_REPO=${PWD} make go-env
```

This will install Golang version use to build PacketFence Golang binaries and check if all modules defined in `go.mod` are available.

You should then source your `.bashrc` to get the new environment variables:

```bash
source ~/.bashrc
```

You can get a complete overview of your Golang environment with `go env` command.

5.1.2. Pulling the dependencies

Dependencies use go modules and will be fetched automatically during build time.

You will also need `ipset-devel` and `pkgconfig` libraries which can be installed using the following command:

**RHEL-based systems**

```bash
yum install ipset-devel pkgconfig
```

**Debian-based systems**

```bash
apt install libipset-dev pkg-config
```
5.1.3. Update dependencies

After you add or remove Golang dependencies, you should run the following command in the `go` directory to update `go.mod` and `go.sum` files:

```
go mod tidy
```

5.1.4. Building the code

All code should be built into a Caddy middleware which we'll then use in a `Caddyfile` to create our recipes. Only reason for not using Caddy would be that the binaries doesn't interact using HTTP (which Caddy can handle at some point). For now, we'll focus only on services using HTTP until we're comfortable with Caddy.

A local version of Caddy is in `caddy/caddy`. This is a vendored version of Caddy which includes the plugins and middlewares for PacketFence.

In order to build the Caddy HTTP service (`pfhttpd`):

```
make pfhttpd
```

Do the same to build `pfdns`, `pfhcp`, `pfdetect` and `pfstats`:

```
make all
make copy
```

5.1.5. Creating a service

Once you've built `pfhttpd`, you can use a `Caddyfile` to load your middleware and bind it on a specific port:

```
localhost:1234 {
    logger {
        requesthistory 100
        level DEBUG
    }
    statsd {
        proto udp
        prefix pfsso
    }
    pfsso
}
```

This file should be put in `/usr/local/pf/conf/caddy-services/pfexample.conf`

Note how you can control the logger configuration from the `Caddyfile`. If your middleware (in
this example `pfsso` uses or calls the logger, you must declare it in your Caddyfile.

If your middleware uses `statsd`, you don't have to configure `statsd` in your Caddyfile which will result in the packets just not being sent (a dummy `statsd` client will be created).

You can start `pfhttpd` with your Caddyfile using the following command:

```
/usr/local/pf/sbin/pfhttpd -conf /usr/local/pf/conf/caddy-services/pfexample.conf
```

Once you have ascertained that the service is working correctly, you need to create an instance of `pf::services::manager` for it. You will also need to create a unitfile for it in `conf/systemd` like the following:

```
[Unit]
Description=PacketFence Example Service
Wants=packetfence-base.target packetfence-config.service packetfence-iptables.service
After=packetfence-base.target packetfence-config.service packetfence-iptables.service
Before=packetfence-pfexample.service

[Service]
PIDFile=/usr/local/pf/var/run/pfexample.pid
ExecStart=/usr/local/pf/sbin/pfhttpd -conf /usr/local/pf/conf/caddy-services/pfexample.conf
Restart=on-failure
Slice=packetfence.slice

[Install]
WantedBy=packetfence.target
```

Make sure that the packaging is also updated to copy those files in the `/usr/lib/systemd/system` directory.

### 5.1.6. Running the tests

Like the perl unit tests, the Golang tests rely on the presence of the test `pfconfig` process to execute properly.

In order to start the test `pfconfig` process:

```
cd /usr/local/pf/t && ./pfconfig-test
```

You can proceed to execute all or some of the Golang unit tests:
cd /usr/local/pf/go
  go test ./...

cd /usr/local/pf/go/firewallsso/lib
  go test

In order to run all the tests easily you can also do:

cd /usr/local/pf/go
  make test
6. Code conventions

6.1. Code style

**CAUTION** Work in progress.

We are slowly migrating away from an automated `perltidy` code style. The reason we are not doing another pass of tidy is that it messes up code history and makes maintainer’s job more complicated than it should be. Every new change uses the new guidelines so over time the old code style will slowly disappear.

- Lines of 120 character width maximum
- No tab characters
- Stay consistent with surrounding white spaces
- Document each subroutine in POD format (`perldoc perlpod`)
- Use constants instead of hard coded strings or numbers (use `constant` or `Readonly` modules)
- in object-oriented modules we use CamelCase notation (ex: `$radiusRequest getVoIpAttributes();`)
- in procedural modules we use Perl’s usual notation (ex: `$node_info{'pid'} = $current_request{'pid'};`)
- regular expressions should be documented (with the `/x` modifier)

```perl
if ($phone_number =~ /
  ^\(?([2-9]\d{2})\)?    # captures first 3 digits allows parens
  (?:-.|\s)?             # separator -, ., space or nothing
  \d{3}                 # captures 3 digits
  (?:-.|\s)?             # separator -, ., space or nothing
  \d{4}$                # captures last 4 digits
  /x) {
  return "$1$2$3";
}
```

- **SQL** should be capitalized, properly indented and always use named fields (no `*`)

Copyright © Inverse inc.
$node_statements->{'node_add_sql'} = get_db_handle()->prepare('"SQL"
SQL

7. HTTP JSON API

PacketFence provides an HTTP JSON API which exposes most of its functionality.

The full API specification for:

- the latest stable release is available from: https://packetfence.org/doc/api/
- the latest devel release is available from: https://packetfence.org/doc/api-devel/

The API is exposed on 127.0.0.1 (localhost) as well as the management interface of the server for remote calls. Users access the API on TCP port 9999 over a secure connection (HTTPS).

Authentication can be done using either the webservices credentials or any credentials that are valid on the web admin interface.

7.1. How to use the API

7.1.1. On a PacketFence server

The pfperl-api command located in /usr/local/pf/sbin/ directory can be use directly from a PacketFence server to query the API without having to specify an authentication token and extra-parameters.

Example to get your general configuration:

```
/usr/local/pf/sbin/pfperl-api get /api/v1/config/base/general \
| python -m json.tool
```

Example to create a node:

```
/usr/local/pf/sbin/pfperl-api get -M POST /api/v1/nodes/ \
| python -m json.tool
```

Example to create a node with JSON payload in a dedicated file:

```
example.json

```
7.1.2. On a different computer

NOTE The API specification mentionned above provides ready-to-use curl commands through the “Try it out” button.

First, get an authentication token with the webservices credentials or an admin account:

```
curl -X POST "https://PF_MANAGEMENT_IP:9999/api/v1/login" \
   -H "accept: application/json" \
   -H "Content-Type: application/json" \
   -d "{"username":"admin","password":"admin"}" \
   --insecure | 
   python -m json.tool
```

You will get following response:

```
{
   "token": "MY_TOKEN"
}
```

Then use this token to query the API. The following example fetches the general configuration:

```
curl -X GET "https://PF_MANAGEMENT_IP:9999/api/v1/config/base/general" \
   -H "accept: application/json" \
   -H "Authorization: MY_TOKEN" \
   --insecure | 
   python -m json.tool
```

Although the API should mostly stay the same, backward compatibility is not 100% guaranteed for the moment until the v1 API reaches full maturity.
8. Customizing PacketFence

8.1. Captive Portal

8.1.1. Presentation

**XHTML Templates**

Captive portal content use Template Toolkit templates. The default template files are located in `/usr/local/pf/html/captive-portal/templates`. You can freely edit the HTML code in these files.

Each template relies on `layout.html` for the common top and bottom portions of the page.

**Internationalized AUP**

In the event that you need an Acceptable Usage Policy that should be translated in different languages in the captive portal, you can create specially named templates that will be used for different languages.

For example, if the browser locale is `es_ES`, creating a template named `aup_text.es.html` will display this AUP when it detects this locale. Same goes for a browser with locale `en_US`, where creating a template named `aup_text.en.html` will be used for English browsers.

The template `aup_text.html` is used as the final fallback for all locales.

Note that you cannot use the full locale in the template name (i.e. `aup_text.en_US.html`) as only the two letter prefix should be used.

**CSS**

The default stylesheet is the result of processing some Sass files structured around the solid inuitcss architectural foundation.

- `/usr/local/pf/html/common/Gruntfile.js` — the task runner configuration file
- `/usr/local/pf/html/common/package.js` — the npm dependencies required to process the Sass files
- `/usr/local/pf/html/common/scss/` — the directory containing the Sass source files
- `/usr/local/pf/html/common/styles.css` — the generated stylesheet

In order to prepare your environment to process the Sass files, you need to install grunt (the task runner) and additional nodejs modules, including the various inuitcss components:
sudo npm install -g grunt-cli

cd /usr/local/pf/html/common

npm install

Once all modules are downloaded, you can customize the Sass files and generate a new stylesheet:

    grunt dist

To change the color palette of the captive portal, modify the file `scss/_settings.colors.scss`.

Workflow

When a HTTP request is received by the Apache web server, the following workflow happens:

1. URL is compared against the redirection instructions in `/usr/local/pf/conf/httpd.conf.d/captive-portal-cleanurls.conf`
2. Requested CGI script in `/usr/local/pf/html/captive-portal/` is executed
3. CGI script calls a `generate_<type>` which is defined in `/usr/local/pf/lib/pf/web.pm`
4. The `generate_<type>` function populate the proper template in `/usr/local/pf/html/captive-portal/templates` in order to render the page

Remediation Pages

The remediation page shown to the user during isolation are specified through the URL parameter of the given security event in `/usr/local/pf/conf/security_events.conf`. In its default configuration, PacketFence uses Template Toolkit to render text provided in the directory `/usr/local/pf/html/captive-portal/templates/security_events` and obeys to everything mentioned in the Presentation section.

Translations

The language of the user registration pages is selected through the `general.locale` configuration parameter. Translatable strings are handled differently for the Remediation pages and the rest of the captive portal:

- Remediation pages

Strings defined in the security event pages (in `/usr/local/pf/html/captive-portal/templates/security_events`) will be looked up in the translation files in `/usr/local/pf/conf/locale/..` and if a translation is available the translated string will be the one visible on the captive portal.

Also, if you create a security event template with the name of your locale in `/usr/local/pf/html/captive-portal/templates/security_events` in the format: `<template_name>.<locale_name>.html`. It will be loaded instead of the default `<template_name>.html` and so you can put strings and HTML directly in your target language without the hassle of escaping everything properly as you would need to do with gettext.

For example, if `malware.es_ES.html` exists and you are using the `es_ES` (Spanish) locale then it
will be loaded instead of malware.html on a security event set to load the malware template.

- Rest of the captive portal

In the templates, if a string is in a \texttt{i18n()} call it will be translated. Also \texttt{pf::web} takes care of performing some of the other translations.

8.2. Adding custom fields to the database

You can, if needed, add additional fields to the PacketFence database. Keep in mind though that this might lead to more work when you upgrade to the next PacketFence version. Depending on the degree of integration of these fields with PacketFence, you'll have to execute one or more of the following steps

8.2.1. Adding a field to the database only

In this case, the field is part of one of the main PacketFence tables, but PacketFence is unaware of it. PacketFence won't consult the field and won't be able to modify it. A possible usage scenario would be a 3rd party application which maintains this field.

Since PacketFence doesn't have to know about the field, all you have to do is execute your SQL \texttt{ALTER TABLE} query and you are done.

8.2.2. Adding a field and giving PacketFence read-only access

In this case, PacketFence can show the contents of the table using both \texttt{pfcmd} but won't be able to modify the contents of the field.

Start by modifying the database table using an \texttt{SQL ALTER TABLE} query.

Then, modify the Perl module having the same name as the table you have added the field to, i.e. If you added the field to the node table, then edit /usr/local/pf/lib/pf/node.pm. You'll have to modify the \texttt{SQL SELECT} queries at the beginning of the file to include your new field and, possibly the functions using these queries. If your new field should be used in reports, the dashboard or graphs, you'll also have to modify the queries in /usr/local/pf/lib/pf/pfcmd/graph.pm, /usr/local/pf/lib/pf/pfcmd/report.pm and /usr/local/pf/lib/pf/pfcmd/dashboard.pm.

8.2.3. Adding a field and giving PacketFence read-write access

Start by creating the read-only field as described above.

Then, modify the \texttt{SQL UPDATE} and \texttt{INSERT} queries in the database tables' Perl module, as well as the associated functions.

8.3. VLAN assignment

PacketFence uses the \texttt{getRegisteredRole} function defined in \texttt{pf::role::custom} to determine a node’s VLAN. Here's the default function:
sub getRegisteredRole {
    #$switch is the switch object (pf::Switch)
    #$ifIndex is the ifIndex of the computer connected to
    #$mac is the mac connected
    #$node_info is the node info hashref (result of pf::node's node_view on
    #$mac)
    #$conn_type is set to the connection type expressed as the constant in
    pf::config
    #$user_name is set to the RADIUS User-Name attribute (802.1X Username or
    MAC address under MAC Authentication)
    #$ssid is the name of the SSID (Be careful: will be empty string if radius
    non-wireless and undef if not radius)
    my ($self, $switch, $ifIndex, $mac, $node_info, $connection_type,
    $user_name, $ssid) = @_;

    my $logger = Log::Log4perl->get_logger();

    return $switch->getVlanByName('normalVlan');
}
9. SNMP

9.1. Introduction


When working with SNMP, you'll sooner or later (in fact more sooner than later) be confronted with having to translate between OIDs and variable names. When the OIDs are part of the Cisco MIBs, you can use the following tool to do the translation: http://tools.cisco.com/Support/SNMP/public.jsp. Otherwise, you'll have to use snmptranslate for example and setup your own collection of MIBs, provided (hopefully) by the manufacturer of your network equipment.

9.2. Obtaining switch and port information

Below are some example of how to obtain simple switch and port information using SNMP. We'll assume that your switch understands SNMP v2, has the read community public defined and is reachable at 192.168.1.10.

9.2.1. Switch Type

snmpwalk -v 2c -c public 192.168.1.10 sysDescr

9.2.2. Switchport indexes and descriptions

snmpwalk -v 2c -c public 192.168.1.10 ifDescr

9.2.3. Switchport types

snmpwalk -v 2c -c public 192.168.1.10 ifType

9.2.4. Switchport status

snmpwalk -v 2c -c public 192.168.1.10 ifAdminStatus
snmpwalk -v 2c -c public 192.168.1.10 ifOperStatus
10. Supporting new network hardware

PacketFence is designed to ease the addition of support for new network hardware referred to as Network Devices. All supported network devices are represented through Perl objects with an extensive use of inheritance. Adding support for a new product comes down to extending the pf::Switch class ([in](/usr/local/pf/lib/pf)).

The starting point to adding support for a new network device should be the vendor’s documentation! First of all, you'll have to figure out the exact capabilities of the switch and how these capabilities will fit into PacketFence. Is it a Switch, an Access-Point or a Wireless Controller?

10.1. Switch

Will you be able to use only link change traps? Does your switch allow you to use MAC notification traps? Port Security? MAC Authentication? 802.1X?

10.1.1. Link change capabilities

You need to define a new class which inherits from pf::Switch and defines at least the following functions:

- getMacAddrVlan
- getVersion
- getVlan
- getVlans
- isDefinedVlan
- parseTrap
- _getMacAtIfIndex
- _setVlan

The parseTrap function will need to return an hash with keys trapType and trapIfIndex. The associated values must be up or down for trapType and the traps' ifIndex for trapIfIndex. See a similar switch’s implementation for inspiration. Usually recent modules are better coded than older ones.

10.1.2. MAC notification capabilities

In addition to the functions mentioned for link change, you need to define the following function:

- isLearntTrapsEnabled

Also, your parseTrap function will need to return trapOperation, trapVlan and trapMac keys in addition to trapType equals mac. See a similar switch’s implementation for inspiration. Usually recent modules are better coded than older ones.
10.1.3. Port security capabilities

In addition to the functions mentioned for link change, you need to define the following functions:

- `isPortSecurityEnabled`
- `authorizeMAC`

In this case, the `parseTrap` function needs to return `secureMacAddrViolation` for the `trapType` key. See a similar switch's implementation for inspiration. Usually recent modules are better coded than older ones.

10.1.4. MAC Authentication

**NOTE** Work in progress

**NAS-Port translation**

Often the `ifIndex` provided by the switch in a RADIUS `Access-Request` is not the same as it's real world physical equivalent. For example in Cisco requests are in the 50xxx while physical `ifIndex` are 10xxx. In order for PacketFence to properly shut the port or request re-authentication a translation between the two is required. To do so provide an implementation of the following interface:

- `NasPortToIfIndex`

**MAC Authentication re-evaluation**

MAC Authentication re-evaluation is necessary in order to provoke a VLAN change in the PacketFence system. This happens for instance when a node is isolated based on an IDS event or when the user successfully authenticates through the captive portal. The default implementation in `pf::Switch` will bounce the port if there is no Voice over IP (VoIP) devices connected to the port. Otherwise it will do nothing and send an email. If your device has specific needs (for example it doesn't support RADIUS Dynamic VLAN Assignments) override:

- `handleReAssignVlanTrapForWiredMacAuth`

Please note that the default implementation works 99% of the time. If you are unsure whether to override, it means you don’t need to override.

Once the MAC Authentication works, add the Wired MAC Auth capability to the switch’s code with:

```
sub supportsWiredMacAuth { return $TRUE; }
```
NAS-Port translation

Often the ifIndex provided by the switch in a RADIUS Access-Request is not the same as it's real world physical equivalent. For example in Cisco requests are in the 50xxx while physical ifIndex are 10xxx. In order for PacketFence to properly shut the port or request re-authentication a translation between the two is required. To do so provide an implementation of the following interface:

- NasPortToIfIndex

So far the implementation has been the same for MAC Authentication and 802.1X.

Force 802.1X re-authentication

802.1X re-authentication is necessary in order to provoke a VLAN change in the PacketFence system. This happens for instance when a node is isolated based on an IDS event or when the user successfully authenticates through the captive portal. The default implementation in \texttt{pf::Switch} uses SNMP and the standard IEEE8021-PAE-MIB and is generally well supported. If the default implementation to force 802.1X re-authentication doesn’t work override:

- dot1xPortReauthenticate

Proper 802.1X implementations will perform re-authentication while still allowing traffic to go through for supplicants under re-evaluation.

Once the 802.1X works, add the Wired Dot1X capability to the switch’s code with:

```perl
sub supportsWiredDot1x { return $TRUE; }
```

10.1.6. RADIUS Dynamic Authorization (RFC3576)

\textbf{NOTE} RADIUS Dynamic Authorization implementation is not recommended on the wired side at this point.

RADIUS Dynamic Authorization also known as RADIUS Change of Authorization (CoA) or RADIUS Disconnect Messages is supported by PacketFence starting with version 3.1.

On wired network devices CoA can be used to change the security posture of a MAC and perform other functions like bounce a port. So far we only encountered support for CoA on the wired side on the Cisco hardware. For an implementation example check \_radiusBounceMac in \texttt{pf::Switch::Cisco}.

10.1.7. Floating Network Devices Support

Floating Network Devices are described in the Administration Guide under "Floating Network Devices" in the "Optional Components" section. Refer to this documentation if you don’t know what Floating Network Devices are.

In order to support Floating Network Devices on a switch, you need to implement the following methods:

- setPortSecurityEnableByIfIndex($ifIndex, $enable)
• isTrunkPort($ifIndex)
• setModeTrunk($ifIndex, $enable)
• setTaggedVlans($ifIndex, $switch_locker_ref, @vlans)
• removeAllTaggedVlans($ifIndex, $switch_locker_ref)

You might need to implement the following:

• enablePortConfigAsTrunk($mac, $switch_port, $switch_locker, $taggedVlans)
  Provided by pf::Switch core as the glue between setModeTrunk(), setTaggedVlans() and removeAllTaggedVlans(). Override if necessary.

• disablePortConfigAsTrunk($switch_port)
  Provided by pf::Switch core as the glue between setModeTrunk(), setTaggedVlans() and removeAllTaggedVlans(). Override if necessary.

• enablePortSecurityByIfIndex($ifIndex)
  Provided by pf::Switch core as a slim accessor to setPortSecurityEnableByIfIndex(). Override if necessary.

• disablePortSecurityByIfIndex($ifIndex)
  Provided by pf::Switch core as a slim accessor to setPortSecurityEnableByIfIndex(). Override if necessary.

• enableIfLinkUpDownTraps($ifIndex)
  Provided by pf::Switch core as a slim accessor to setIfLinkUpDownTrapEnable. Override if necessary.

• disableIfLinkUpDownTraps($ifIndex)
  Provided by pf::Switch core as a slim accessor to setIfLinkUpDownTrapEnable. Override if necessary.

Once all the required methods are implemented, enable the capability in the switch's code with:

```perl
sub supportsFloatingDevice { return $TRUE; }
```

### 10.2. Wireless Access-Points or Controllers

#### 10.2.1. Minimum hardware requirements

PacketFence's minimum requirements regarding Wireless hardware is:

• definition of several SSID with several VLANs inside every SSID (minimum of 2 VLANs per SSID)
• RADIUS authentication (MAC Authentication / 802.1X)
• Dynamic VLAN assignment through RADIUS attributes
• a means to de-associate or de-authenticate a client through CLI (Telnet or SSH), SNMP, RADIUS Dyn-Auth[^3] or WebServices

Most of these features are available on enterprise grade Access Points (AP) or Controllers. Where the situation starts to vary wildly is for deauthentication support.

### 10.2.2. De-authentication techniques

#### CLI (SSH or Telnet)

An error prone interface and requires preparation for the SSH access or is insecure for Telnet. Not recommended if you can avoid it.

#### SNMP

SNMP de-authentication works well when available. However Vendor support is not consistent and the OID to use are not standard.

#### RADIUS Dynamic Authorization (RFC3576)

RADIUS Dynamic Authorization also known as RADIUS Change of Authorization (CoA) or RADIUS Disconnect Messages is supported by PacketFence starting with version 3.1. When supported it is the preferred technique to perform de-authentication. It is standard and requires less configuration from the user.

An actual implementation can be found in pf::Switch::Aruba.

### 10.2.3. Template module

Start with a copy of the template module pf/lib/pf/Switch/WirelessModuleTemplate.pm and fill in appropriate documentation and code.

### 10.2.4. Required methods

You need to implement at least:

#### getVersion()

Fetches firmware version

#### parseTrap()

Parses the SNMP Traps sent by the hardware. For wireless hardware an empty method like the one in pf::Switch::WirelessModuleTemplate is ok.

#### deauthenticateMac()

Performs deauthentication

#### supportsWirelessMacAuth()

Return $TRUE if MAC-Authentication is supported

#### supportsWirelessDot1x()

Return $TRUE if 802.1X (aka WPA-Enterprise) is supported

[^3]: RADIUS Dyn-Auth
10.2.5. Override methods

If default implementation of the following methods doesn't work you will need to override them:

```javascript
extractSsid()
```
Extract SSID from RADIUS Request

10.2.6. Special case: bridged versus tunneled modes and deauthentication

It is important to validate the Access-Point (AP) to Controller relationship when operating in bridged mode versus when operating in tunneled mode. For example, some hardware will send the RADIUS Access-Request from the AP when in bridged mode even though it is controlled by a controller. This behavior impacts deauthentication because it still needs to be performed on the controller. To support this behavior a switches.conf parameter was introduced: `controller_ip`.

When adding a new Wireless module try to validate the bridged versus tunneled behavior and modify `deauthenticateMac()` to honor `controller_ip` if required.

10.3. The "adding a new network device module in PacketFence" checklist

Here’s a quick rundown of the several files you need to edit in order to add a new switch into PacketFence. There’s a plan to reduce this amount of work in progress see issue #1085.

- Tested model and firmware version should be documented in module’s POD
- Any bugs and limitations should be documented in module’s POD
- Make sure that all tests pass
- Add configuration documentation to the Network Devices Guide
- Add switch to the Network Devices Guide’s switch chart
- Add switch to the chart in README.network-devices

[3] RADIUS Dynamic Authorization (RFC 3576) aka Change of Authorization (CoA) or Disconnect-Messages (DM aka PoD)
11. PacketFence builds

11.1. Packer

To build PacketFence, we use Packer to create Docker images that are then used in a GitLab pipeline.

11.2. Anatomy of Packer template

PacketFence rely on gitlab-buildpkg images to run GitLab pipeline with gitlab-buildpkg-tools. Packer template (pfbuild.json) use these images as base to build inverseinc Docker images.

11.2.1. Custom build dependencies

To start building PacketFence, we need to install specific things in images like:

- custom repositories and GPG keys to install RPM or DEB packages at build time
- install and configure upstream softwares necessary to build PacketFence if we can't use packages

We use Ansible and shell scripts to cover these steps. It's possible because Python is already installed in gitlab-buildpkg images.

11.2.2. Build dependencies in packages specs

Build dependencies need to be install in Docker images before starting build process. We rely on gitlab-buildpkg-tools to automatically install those dependencies based on packages specifications file. Consequently, all build requires need to be define in packages specifications file.

11.2.3. Golang environment

We use Packer to set up a Golang environment in order to build Golang binaries in Docker images.

We also set environment variables in Docker images, using ENV directives, to simplify usage of go commands.

11.2.4. Clean up

To make Docker images lightweight, we make a clean up at end of the process.

11.3. How to build Docker images?

Docker images are built inside a GitLab pipeline.
11.3.1. Prerequisites

*Install following softwares:*

- Packer (>=1.6.5)
- Docker
- Ansible (>=2.10)

11.3.2. Makefile

Because we run build inside a GitLab pipeline, many environment variables can be set to change build behavior. A Makefile and a wrapper are provided to simplify creation of a new Docker images based on environment variables.

*Example usage of Makefile*

```
GOVERSION=go1.16.4 ACTIVE_BUILDS=pfbuild-bullseye PF_MINOR_RELEASE=11.0 \
make -e -C ci/packer
```

11.4. Troubleshooting

You can troubleshoot issues in Packer builds by setting environment variable `$PACKER_LOG` environment variable to `1`. 
12. Developer recipes

12.1. Virtual environment

To test PacketFence on several distributions, we used Vagrant virtual machines. You can set up a similar environment to develop.

12.1.1. Virtual environment: prerequisites

Install following softwares:

- **Vagrant (>= 2.2.10)** provided by Hashicorp
- **libvirt, KVM/QEMU and vagrant-libvirt** if you want to use libvirt as a provider for Vagrant
- **pywinrm > 0.3.0** if you want to use ad virtual machine
- **Ansible = 2.10.X**

12.1.2. Virtual environment: initial setup

Install Ansible and Ansible code

**RHEL-based systems**

```bash
yum install -y python3-pip
```

**Debian-based systems**

```bash
apt update
apt install -y python3-pip
```

Then install Ansible through **pip**:

```bash
pip3 install --user ‘ansible<3’
```

After installing Ansible through **pip**, you need to add `$HOME/.local/bin/` to your PATH.

Using **ansible-galaxy** command, you can then pull PacketFence’s collection and Ansible roles:

```bash
cd packetfence/addons/vagrant
ansible-galaxy install -r requirements.yml
```
12.2. Running development version

12.2.1. Bleeding edge

For day to day development one can run a checkout of the current development branch in `/usr/local/pf/` and develop there within a working setup.

12.2.2. Not so bleeding edge

If you prefer to use packages, you can install latest PacketFence packages from nightly builds.

Initial setup

Install prerequisites and follow initial setup then start `pf*dev` machines.

These machines will be auto-configured to install nightly builds from development repositories.

Packages from PPA

If you want to install latest packages built in the pipeline, available on GitLab, you can use following commands:

```bash
CI_PROJECT_NAME="ppa" CI_PAGES_URL="http://inverse-inc.gitlab.io/packetfence"
vagrant up VM_NAME
```

**WARNING** Packages available here could be build on other branches than devel.

Day to day usage

To keep your machine up-to-date, you can run the following commands:

```bash
vagrant provision --provision-with=install VM_NAME
```

Make sure you read the Upgrade Guide after every upgrades to avoid any surprises.

Running an Ansible playbook against Vagrant virtual machines

If you want to use Ansible directly against Vagrant virtual machines (already started), you can use following commands:

```bash
ansible-playbook site.yml --limit VM_NAME
```

It’s possible because we use a static Ansible inventory. This inventory is also used by Vagrant to start virtual machines.

Specific version of a package

If you want to install a specific version of a package, you can create a YAML file that override
default inventory, for example:

cat >> extra.yml << EOF
packetfence_install__centos_packages:
   - packetfence-9.2.0-20191126180126.98740132.0007.el7
EOF
ansible-playbook site.yml --limit VM_NAME -e @extra.yml
13. Running tests

13.1. Unit tests

13.1.1. Unit tests: prerequisites

Prerequisites to run unit tests:

- MariaDB up and running
- PacketFence package(s) installed with all dependencies in `/usr/local/pf` directory
- Fingerbank API key configured
- Environment variables defined:
  - `PF_TEST_MGMT_INT`
  - `PF_TEST_MGMT_IP`
  - `PF_TEST_MGMT_MASK`
- Golang environment

You can meet these prerequisites by starting a `pf*dev` Vagrant virtual machine using instructions in Virtual environment: initial setup section.

Inside `pf*dev` virtual machines, `t` directory will be available under `/usr/local/pf/t`.

13.1.2. Running all unit tests

After a `vagrant up` command, unit tests should have been run. If you want to run them again, execute following command:

```
vagrant provision --provision-with=run-unit-tests VM_NAME
```

This will upload `run-tests.sh` script on virtual machine to run it.

**IMPORTANT**

Don't forget to run a `vagrant rsync VM_NAME` before running unit tests again if you modify `t` directory on your host. This will upload latest changes made to `/src/t` directory in `VM_NAME`.

13.1.3. Running Perl unit tests

If you want to run only Perl unit tests, disable Golang unit tests using `GOLANG_UNIT_TESTS` environment variable:

```
GOLANG_UNIT_TESTS=no vagrant provision --provision-with=run-unit-tests VM_NAME
```
13.1.4. Running Golang unit tests

If you want to run only Golang unit tests, disable Perl unit tests using `PERL_UNIT_TESTS` environment variable:

```
PERL_UNIT_TESTS=no vagrant provision --provision-with=run-unit-tests VM_NAME
```

You can get more details on Golang unit tests in Golang section.

13.1.5. Wrapper

In `ci/lib/test`, you will find a `Makefile` used as a wrapper to start, test and destroy virtual machines. Examples:

**Usage of Makefile**

```
make -C ci/lib/test test-pfcen7dev-dev
make -e -C ci/lib/test test-pfcen7dev-dev
make PF_VM_NAME=pfdeb9dev PERL_UNIT_TESTS=no -C ci/lib/test test
make PF_VM_NAME=pfdeb9dev clean
```

13.2. Integration tests

The aim of integration tests is to test common PacketFence scenarios and integrations in a pipeline.

Integration tests rely on:

- Virtual environment
- network topologies built using `libvirt`[^1]
- virtual machines different than PacketFence to test integrations

13.2.1. Network subnets and IP addresses

**Table 2. Subnet table**

<table>
<thead>
<tr>
<th>Network name</th>
<th>Subnet</th>
<th>VLAN ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>172.17.17.0/24</td>
<td>17</td>
</tr>
<tr>
<td>Registration</td>
<td>172.17.2.0/24</td>
<td>2</td>
</tr>
<tr>
<td>Isolation</td>
<td>172.17.3.0/24</td>
<td>3</td>
</tr>
<tr>
<td>Inline L2</td>
<td>172.17.6.0/24</td>
<td>6</td>
</tr>
<tr>
<td>Inline L3</td>
<td>172.17.18.0/24</td>
<td>18</td>
</tr>
<tr>
<td>Internet</td>
<td>192.168.121.0/24</td>
<td>100</td>
</tr>
</tbody>
</table>

 Management network is used to provision each virtual machine using Ansible to put them in a

[^1]: "[libvirt](#)"
desired state.

Table 3. IP addresses assigned to virtual machines

<table>
<thead>
<tr>
<th>Virtual machine</th>
<th>Network name</th>
<th>IP address</th>
</tr>
</thead>
<tbody>
<tr>
<td>pfel8dev</td>
<td>Management</td>
<td>172.17.17.10</td>
</tr>
<tr>
<td>pfel8stable</td>
<td>Management</td>
<td>172.17.17.14</td>
</tr>
<tr>
<td>pfdeb11dev</td>
<td>Management</td>
<td>172.17.17.12</td>
</tr>
<tr>
<td>pfdeb11stable</td>
<td>Management</td>
<td>172.17.17.16</td>
</tr>
<tr>
<td>ad</td>
<td>Management</td>
<td>172.17.17.100</td>
</tr>
<tr>
<td>linux01</td>
<td>Management</td>
<td>172.17.17.101</td>
</tr>
<tr>
<td>linux02</td>
<td>Management</td>
<td>172.17.17.102</td>
</tr>
<tr>
<td>switch01</td>
<td>Management</td>
<td>172.17.17.201</td>
</tr>
<tr>
<td>wireless01</td>
<td>Management</td>
<td>172.17.17.210</td>
</tr>
<tr>
<td>node01</td>
<td>Management</td>
<td>172.17.17.251</td>
</tr>
<tr>
<td>node02</td>
<td>Management</td>
<td>172.17.17.252</td>
</tr>
<tr>
<td>pf<em>dev or pf</em>stable</td>
<td>Registration</td>
<td>172.17.2.2</td>
</tr>
<tr>
<td>pf<em>dev or pf</em>stable</td>
<td>Isolation</td>
<td>172.17.3.2</td>
</tr>
<tr>
<td>pf<em>dev or pf</em>stable</td>
<td>Inline L2</td>
<td>172.17.6.2</td>
</tr>
<tr>
<td>switch01</td>
<td>Inline L2</td>
<td>172.17.6.3</td>
</tr>
<tr>
<td>switch01</td>
<td>Inline L3</td>
<td>172.17.18.254</td>
</tr>
</tbody>
</table>

NOTE  First IP address (.1) in each subnet is reserved for libvirt hypervisor.

13.2.2. Wired network topology
Initial Provisioning

switch01, node01 and node02 are provisioned using Vagrant like this:

- a first boot with basic shell provisioning to configure interfaces remap and networks
- a second boot that handles interface remap
- an Ansible provisioning

Provisioning is deliberately minimalist to make the most during integration tests.

Inventory Information

Table 4. IPAM table

<table>
<thead>
<tr>
<th>Virtual machine</th>
<th>Interfaces</th>
<th>MAC address</th>
</tr>
</thead>
<tbody>
<tr>
<td>switch01</td>
<td>swp48, bridge, bridge.6, bridge.17, bridge.18, bridge.100</td>
<td>Same MAC, automatically generated</td>
</tr>
<tr>
<td>switch01</td>
<td>swp1</td>
<td>a0:00:00:00:00:01</td>
</tr>
<tr>
<td>switch01</td>
<td>swp2</td>
<td>44:38:39:00:00:02</td>
</tr>
<tr>
<td>switch01</td>
<td>swp3</td>
<td>44:38:39:00:00:03</td>
</tr>
<tr>
<td>switch01</td>
<td>swp6</td>
<td>44:38:39:00:00:06</td>
</tr>
<tr>
<td>switch01</td>
<td>swp11</td>
<td>44:38:39:00:00:11</td>
</tr>
<tr>
<td>switch01</td>
<td>swp12</td>
<td>44:38:39:00:00:12</td>
</tr>
</tbody>
</table>
13.2.3. Wireless network topology

Figure 3. Wireless network topology

Inventory Information

Table 5. IPAM table

<table>
<thead>
<tr>
<th>Virtual machine</th>
<th>Interfaces</th>
<th>MAC address</th>
</tr>
</thead>
<tbody>
<tr>
<td>wireless01</td>
<td>wlan0 (hostapd managed</td>
<td>02:00:00:00:00:00</td>
</tr>
<tr>
<td></td>
<td>interface)</td>
<td></td>
</tr>
<tr>
<td>wireless01</td>
<td>wlan0.XXX (with XXX VLAN</td>
<td>02:00:00:00:00:00</td>
</tr>
<tr>
<td></td>
<td>VLAN returned by PacketFence in RADIUS reply)</td>
<td></td>
</tr>
<tr>
<td>wireless01</td>
<td>wlan1 (wpa_supplicant</td>
<td>02:00:00:00:01:00</td>
</tr>
<tr>
<td></td>
<td>interface)</td>
<td></td>
</tr>
</tbody>
</table>

On wireless01:
• wlan0 is the interface which represents an access point (NAS for PacketFence)
• wlan1 is the interface which represents a supplicant (node for PacketFence)

13.2.4. Virtual machines

Active Directory Server

Virtual machine called ad will be auto-provisioned with:

• a DNS domain
• an Active Directory domain
• Active Directory Certificate Services (AD CS) with auto-enrollment using a GPO
• a `vagrant-domain` account, member of Domain admins group, with VagrantPass1 as password
• a `packetfence` account, member of Domain users group, with P@ck3tF3nc3pass as password

Several reboots are necessary before machine can be provisioned by Ansible. During initial Ansible provisioning, several reboots will occur too. It takes like 10 minutes to have a machine up and running.

Vagrant admin accounts:

```yaml
---
domain_setup__domain_name: '{{ dns_domain }}'
domain_setup__safe_mode_password: VagrantPass1
domain_setup__username: vagrant-domain
domain_setup__password: VagrantPass1
```

PacketFence domain account:

```yaml
---
packetfence_domain_account: 'packetfence'
packetfence_domain_email: 'packetfence@{{ domain_setup__domain_name }}'

# be careful with password restrictions
packetfence_domain_password: 'P@ck3tF3nc3pass'

packetfence_domain_default_groups:
  - Domain Users
packetfence_domain_groups:
  - sponsor
  - IT
```

Switch01

`switch01` is a virtual switch that uses Cumulus Linux 3.7 system.

This switch is configured using a VLAN aware-bridge to manage VLAN on interfaces
hostapd is the daemon responsible to send 802.1X and MAC Authentication requests to RADIUS server (as described in 802.1X Cumulus Linux documentation). We configured this daemon using Ansible with RADIUS server informations. However, daemon will be started during integration tests when switch interfaces are involved.

Node01 and Node02

node01 is a Debian Buster virtual machine used as node to test wired PacketFence features like 802.1X, MAC authentication, registration, isolation and inline scenarios.

node02 is identical to node01 but is only used to test inline L3 features of PacketFence.

These machines have an Internet access only during its first boot to emulate a node connected to a switch controlled by PacketFence. After the reboot, machines are only reachable using management network: `vagrant ssh node01` will not work.

All interfaces of node01 and node02 are up after initial provisionning. We rely on switch01 configuration to trigger specific scenario.

Because node01 and node02 have no IP on management network during first boot, Ansible provisioning through Vagrant is specific and made in two steps:

- pre-provisioning using dynamic inventory generated by Vagrant and a specific playbook
- post-provisioning identical to other Vagrant VMs (but without any Internet access)

Pre-provisioning playbooks should be used to install everything that require an Internet access.

Pre-provisioning step will not use variables defined in common Ansible inventory: variables need to be defined directly in playbooks that run during this step. Variables defined in common Ansible inventory and in playbooks need to be consistent to avoid an override during post-provisioning.

Wireless01

wireless01 is a Debian Buster virtual machine used as a virtual switch and node. It is used to test Wireless PacketFence features like 802.1X, MAC authentication.

hostapd is the daemon responsible to send 802.1X and MAC Authentication requests to RADIUS server. It is using the kernel module mac80211_hwsim, a software simulator of 802.11 radio(s) for mac80211 (as described in Linux Wireless mac80211_hwsim). We configured this daemon using Ansible with RADIUS server informations.

Two daemons are available. One for an Open SSID and the other for a Secure SSID. Both are set to not run at the same time.

wpa_supplicant utility is an implementation of the WPA Supplicant component with support for WPA and WPA2 (IEEE 802.11i / RSN). Supplicant is the IEEE 802.1X/WPA Supplicant for wireless network devices. It implements key negotiation with a WPA Authenticator which controls the roaming and IEEE 802.11 authentication/association of the wlan driver.

Linux servers

Linux servers are used to:
• provide infrastructure services to PacketFence server(s)
• host services to test integration with PacketFence

They are provisioned using Ansible.
14. Contributing

Here are some golden rules of contributing to PacketFence:

• Be active on the developer mailing list

The place to be if you want to contribute to the PacketFence project is our developers mailing list: https://lists.sourceforge.net/lists/listinfo/packetfence-devel. Let us know your issues, what you are working on and how you want to solve your problems. The more you collaborate the greater the chances that your work will be incorporated in a timely fashion.

• Use the issue tracker: https://packetfence.org/bugs/

Good chances that the bug you want to fix or the feature you want to implement is already filed and that information in the ticket will help you.

• Please provide small, focused and manageable patches or pull-requests

If you plan on doing a lot of code, use git and track our current stable branch called stable. Develop the feature in small chunks and stay in touch with us. This way it'll be merged quickly in our code base. Ideally there would be no big code dumps after finishing a feature.

14.1. Creating patches

NOTE Since we migrated to git / github, using these tools is recommended over sending patches by hand.

Patches should be sent in unified diff format. This can be obtained from the diff or git tools.

```
diff -u oldfile newfile
```

or from a checkout of the PacketFence source code from git:

```
git diff
```

14.2. Translations

The internationalization process uses gettext. If you are new to gettext, please consult http://www.gnu.org/software/gettext/manual/gettext.html#Overview for a quick introduction.

The PO files are stored in /usr/local/pf/conf/locale. List that directory to see the languages we currently have translations for.
14.2.1. Online using Transifex

We use the hosted service Transifex to translate PacketFence’s PO files. It offers the possibility to translate all the strings online as well as providing a command-line tool to push your changes. It’s very convenient.

To use Transifex, you must first sign up for a free account here: https://www.transifex.net/plans/signup/free/

- Once registered, request a new team for your language
- Once authorized, you’ll be able to start/continue translating PacketFence in your language

If you need further help about using Transifex, you might want to have a look here.

14.2.2. Using traditional method

If you want to add support for a new language, please follow these steps:

1. create a new language subdirectory in /usr/local/pf/conf/locale
2. change into your newly created directory
3. create a new subdirectory LC_MESSAGES
4. change into your newly created directory
5. copy the file /usr/local/pf/conf/locale/en/LC_MESSAGES/packetfence.po into your directory
6. translate the message strings in packetfence.po
7. create the MO file by executing:

   /usr/bin/msgfmt packetfence.po

Submit your new translation to the PacketFence project by contacting us at packetfence-devel@lists.sourceforge.net.
15. Additional Information

For more information, please consult the mailing archives or post your questions to it. For details, see:

- **packetfence-announce@lists.sourceforge.net**: Public announcements (new releases, security warnings etc.) regarding PacketFence
- **packetfence-devel@lists.sourceforge.net**: Discussion of PacketFence development
- **packetfence-users@lists.sourceforge.net**: User and usage discussions
16. Commercial Support and Contact Information

For any questions or comments, do not hesitate to contact us by writing an email to: support@inverse.ca.

Inverse (https://inverse.ca) offers professional services around PacketFence to help organizations deploy the solution, customize, migrate versions or from another system, performance tuning or aligning with best practices.

Hourly rates or support packages are offered to best suit your needs.

Please visit https://inverse.ca/ for details.
17. GNU Free Documentation License

Please refer to http://www.gnu.org/licenses/fdl-1.2.txt for the full license.