System Principles

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Chapter 1

System Principles

1.1 System Principles

1.1.1 Starting the System

An Erlang runtime system is started with the command `erl`:

```
% erl
Erlang (BEAM) emulator version 5.2.3.5 [hipe] [threads:0]
Eshell V5.2.3.5 (abort with ^G)
```

`erl` understands a number of command line arguments, see `erl(1)`. A number of them are also described in this chapter.

Application programs can access the values of the command line arguments by calling one of the functions `init:get_argument(Key)`, or `init:get_arguments()`. See `init(3)`.

1.1.2 Restarting and Stopping the System

The runtime system can be halted by calling `halt/0,1`. See `erlang(3)`.

The module `init` contains function for restarting, rebooting and stopping the runtime system. See `init(3)`.

```
init:restart()
init:reboot()
init:stop()
```

Also, the runtime system will terminate if the Erlang shell is terminated.
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1.1.3 Boot Scripts

The runtime system is started using a boot script. The boot script contains instructions on which code to load and which processes and applications to start.

A boot script file has the extension .script. The runtime system uses a binary version of the script. This binary boot script file has the extension .boot.

Which boot script to use is specified by the command line flag -boot. The extension .boot should be omitted. Example, using the boot script start_all.boot:

```
% erl -boot start_all
```

If no boot script is specified, it defaults to ROOT/bin/start, see Default Boot Scripts below.

The command line flag -init debug makes the init process write some debug information while interpreting the boot script:

```
% erl -init_debug
default,progress,preloaded
{progress,kernel_load_completed}
default,progress,modules_loaded
{start,heart}
debug,error_logger
...```

See script(4) for a detailed description of the syntax and contents of the boot script.

Default Boot Scripts

Erlang/OTP comes with two boot scripts:

```
start_clean.boot  Loads the code for and starts the applications Kernel and STDLIB.
start_sasl.boot   Loads the code for and starts the applications Kernel, STDLIB and SASL.
```

Which of `start_clean` and `start_sasl` to use as default is decided by the user when installing Erlang/OTP using `install`. The user is asked “Do you want to use a minimal system startup instead of the SASL startup”. If the answer is yes, then `start_clean` is used, otherwise `start_sasl` is used. A copy of the selected boot script is made, named `start.boot` and placed in the `ROOT/bin` directory.

User-Defined Boot Scripts

It is sometimes useful or necessary to create a user-defined boot script. This is true especially when running Erlang in embedded mode, see Code Loading Strategy [page 3].

It is possible to write a boot script manually. The recommended way to create a boot script, however, is to generate the boot script from a release resource file `Name.rel`, using the function `systools:make_script/1,2`. This requires that the source code is structured as applications according to the OTP design principles. (The program does not have to be started in terms of OTP applications but can be plain Erlang).

Read more about .rel files in OTP Design Principles and rel(4).

The binary boot script file `Name.boot` is generated from the boot script file `Name.script` using the function `systools:script2boot(File)`. 

---

2 System Principles
1.1.4 Code Loading Strategy

The runtime system can be started in either embedded or interactive mode. Which one is decided by the command line flag `-mode`.

```
% erl -mode embedded
```

Default mode is interactive.

- In embedded mode, all code is loaded during system start-up according to the boot script. (Code can also be loaded later by explicitly ordering the code server to do so).
- In interactive mode, code is dynamically loaded when first referenced. When a call to a function in a module is made, and the module is not loaded, the code server searches the code path and loads the module into the system.

Initially, the code path consists of the current working directory and all object code directories under `ROOT/lib`, where `ROOT` is the installation directory of Erlang/OTP. Directories can be named `Name[-Vsn]` and the code server, by default, chooses the directory with the highest version number among those which have the same `Name`. The `-Vsn` suffix is optional. If an `ebin` directory exists under the `Name[-Vsn]` directory, it is this directory which is added to the code path.

The code path can be extended by using the command line flags `-pa Directories` and `-pz Directories`. These will add `Directories` to the head or end of the code path, respectively. Example

```
% erl -pa /home/arne/mycode
```

The code server module `code` contains a number of functions for modifying and checking the search path, see `code(3)`.  

1.1.5 File Types

The following file types are defined in Erlang/OTP:

<table>
<thead>
<tr>
<th>File Type</th>
<th>File Name/Extension</th>
<th>Documented in</th>
</tr>
</thead>
<tbody>
<tr>
<td>module</td>
<td>.erl</td>
<td>Erlang Reference Manual</td>
</tr>
<tr>
<td>include file</td>
<td>.hrl</td>
<td>Erlang Reference Manual</td>
</tr>
<tr>
<td>release resource file</td>
<td>.rel</td>
<td>rel(4)</td>
</tr>
<tr>
<td>application resource file</td>
<td>.app</td>
<td>app(4)</td>
</tr>
<tr>
<td>boot script</td>
<td>.script</td>
<td>script(4)</td>
</tr>
<tr>
<td>binary boot script</td>
<td>.boot</td>
<td></td>
</tr>
<tr>
<td>configuration file</td>
<td>.config</td>
<td>config(4)</td>
</tr>
<tr>
<td>application upgrade file</td>
<td>.appup</td>
<td>appup(4)</td>
</tr>
<tr>
<td>release upgrade file</td>
<td>relup</td>
<td>relup(4)</td>
</tr>
</tbody>
</table>

Table 1.1: File Types
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1.2 Error Logging

1.2.1 Error Information From the Runtime System

There is a system process with the registered name error_logger. This process receives all error messages from the Erlang runtime system and, by default, writes them to the terminal (tty):

```plaintext
=ERROR REPORT==== 9-Dec-2003::13:25:02 ===
Error in process <0.27.0> with exit value: {{badmatch,[1,2,3]},{m,f,1},{shell,eval_loop,2}}
```

The exit values used by the runtime system are described in Erlang Reference Manual, in the chapter about Errors and Error Handling.

The process error_logger and its user interface (with the same name) are described in error_logger(3). Among other things, it is possible to define that error information should be written to a specified file instead of the tty.

The error logger is part of the Kernel application and it is also possible to use the Kernel configuration parameter error_logger to define if error information should be written to terminal, file or not be written at all. See kernel(6).

During system start-up, errors are written unformatted to standard out and also kept in a buffer. All buffered errors are written again when the intended handler (tty or file) is installed.

When the error_logger process is notified about an error, the message is passed to the the error_logger on the node which is the group leader process for the process which caused the error.

1.2.2 User Defined Error Information

The user can use the standard error_logger process to report errors in the application code by calling the error_logger module interface functions error_msg/1, error_msg/2, info_msg/1, info_msg/2, format/2, error_report/1, and info_report/1. See error_logger(3).

For example, some of the OTP applications call these functions to report serious errors.

1.2.3 Logging To Disk

The standard configuration of the error logger supports the logging of errors to the tty, or to a specified file. There is also a multi-file logger which logs all events, not only the standard error events, to several files. See log_mfl(3).
1.2.4 Adding A Customized Event Handler To Error Logger

The error_logger process is an event manager, implemented using the standard behaviour gen_event. See OTP Design Principles and gen_event(3).

It is thus possible to add customized error report event handlers. This may be desirable in order to satisfy one of the following purposes:

- to perform additional processing of standard error messages,
- to override the standard behaviour (the standard event handlers must be deleted), or
- to handle new types of error messages.

The following two functions are used to add and delete handlers:

- add_report_handler to add a handler, and
- delete_report_handler to delete a handler.

New types of error message can be reported with the error_logger:error_report/2 and error_logger:info_report/2 functions. Errors which are reported this way are ignored by the standard error logger event handlers.

The following event is generated by a process Pid calling error_logger:error_report(Type, Report):

{error_report, Gleader, {Type, Pid, Report}}

Gleader is the group leader for the process where the call originated, i.e. normally Pid unless, for example, the function was evaluated using rpc:call/4.

The following event is generated by a process Pid calling error_logger:info_report(Type, Report):

{info_report, Gleader, {Type, Pid, Report}}

Example:

-module(my_error_logger_h).
-behaviour(gen_event).
-export([start/0, stop/0]).
-export([report/1]).
-export([init/1, handle_event/2, terminate/2]).

start() ->
    error_logger:add_report_handler(my_error_logger_h).

stop() ->
    error_logger:delete_report_handler(my_error_logger_h).

report(MyError) ->
    error_logger:error_report(my_error, MyError).

init(_Arg) ->
    {ok, []}.

handle_event({error_report, GL, {Pid, my_error, MyError}}, State) ->
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1.2.5 SASL Error Logging

The application SASL provides additional error information in the form of crash reports, which are especially useful in a system structured according to the OTP Design Principles. See SASL User's Guide for more information.

1.3 Creating a First Target System

1.3.1 Introduction

When creating a system using Erlang/OTP, the most simple way is to install Erlang/OTP somewhere, install the application specific code somewhere else, and then start the Erlang runtime system, making sure the code path includes the application specific code.

Often it is not desirable to use an Erlang/OTP system as is. A developer may create new Erlang/OTP compliant applications for a particular purpose, and several original Erlang/OTP applications may be irrelevant for the purpose in question. Thus, there is a need to be able to create a new system based on a given Erlang/OTP system, where dispensable applications are removed, and a set of new applications that are included in the new system. Documentation and source code is irrelevant and is therefore not included in the new system.

This chapter is about creating such a system, which we call a target system.

In the following sections we consider creating target systems with different requirements of functionality:

- a basic target system that can be started by calling the ordinary erl script,
- a simple target system where also code replacement in run-time can be performed, and
- an embedded target system where there is also support for logging output from the system to file for later inspection, and where the system can be started automatically at boot time.

We only consider the case when Erlang/OTP is running on a UNIX system.

There is an example Erlang module target_system.erl that contains functions for creating and installing a target system. That module is used in the examples below. The source code of the module is listed at the end of this chapter.
1.3.2 Creating a Target System

It is assumed that you have a working Erlang/OTP system structured according to the OTP Design Principles.

Step 1. First create a .rel file (see rel(4)) that specifies the erts version and lists all applications that should be included in the new basic target system. An example is the following mysystem.rel file:

```erlang
%% mysystem.rel
{release, 
 {"MYSYSTEM", "FIRST"},
 {erts, "5.1"},
 [{kernel, "2.7"},
  {stdlib, "1.10"},
  {sasl, "1.9.3"},
  {pea, "1.0"}].
```

The listed applications are not only original Erlang/OTP applications but possibly also new applications that you have written yourself (here exemplified by the application pea).

Step 2. From the directory where the mysystem.rel file reside, start the Erlang/OTP system:

```erlang
erl -pa /home/user/target_system/myapps/pea-1.0/ebin
```

where also the path to the pea-1.0 ebin directory is provided.

Step 2. Now create the target system:

```erlang
1> target_system:create("mysystem").
```

The target_system:create/1 function does the following:

1. Reads the mysystem.rel file, and creates a new file plain.rel which is identical to former, except that it only lists the kernel and stdlib applications.
2. From the mysystem.rel and plain.rel files creates the files mysystem.script, mysystem.boot, plain.script, and plain.boot through a call to systools:make_script/2.
3. Creates the file mysystem.tar.gz by a call to systools:make_tar/2. That file has the following contents:

   erts-5.1/bin/
   releases/FIRST/start.boot
   releases/mysystem.rel
   lib/kernel-2.7/
   lib/stdlib-1.10/
   lib/sasl-1.9.3/
   lib/pea-1.0/

   The file releases/FIRST/start.boot is a copy of our mysystem.boot, and a copy of the original mysystem.rel has been put in the releases directory.
4. Creates the temporary directory tmp and extracts the tar file mysystem.tar.gz into that directory.
5. Deletes the erl and start files from tmp/erts-5.1/bin. XXX Why.
6. Creates the directory tmp/bin.
7. Copies the previously creates file plain.boot to tmp/bin/start.boot.
8. Copies the files `epmd`, `run_erl`, and `to_erl` from the directory `tmp/erts-5.1/bin` to the directory `tmp/bin`.

9. Creates the file `tmp/releases/start_erl.data` with the contents “5.1 FIRST”.

10. Recreates the file `mysystem.tar.gz` from the directories in the directory `tmp`, and removes `tmp`.

### 1.3.3 Installing a Target System

Step 3. Install the created target system in a suitable directory.

```erlang
3> target_system:install("mysystem", "/usr/local/erl-target").
```

The function `target_system:install/2` does the following:

1. Extracts the tar file `mysystem.tar.gz` into the target directory `/usr/local/erl-target`.
2. In the target directory reads the file `releases/start_erl.data` in order to find the Erlang runtime system version (“5.1”).
3. Substitutes `%FINAL_ROOTDIR%` and `%EMU%` for `/usr/local/erl-target` and `beam`, respectively, in the files `erl.src`, `start.src`, and `start.erl.src` of the target `erts-5.1/bin` directory, and puts the resulting files `erl`, `start`, and `run_erl` in the target `bin` directory.
4. Finally the target `releases/RELEASES` file is created from data in the `releases/mysystem.rel` file.

### 1.3.4 Starting a Target System

Now we have a target system that can be started in various ways.

We start it as a basic target system by invoking

```erlang
/usr/local/erl-target/bin/erl
```

where only the `kernel` and `stdlib` applications are started, i.e. the system is started as an ordinary development system. There are only two files needed for all this to work: `bin/erl` file (obtained from `erts-5.1/bin/erl.src`) and the `bin/start.boot` file (a copy of `plain.boot`).

We can also start a distributed system (requires `bin/epmd`).

To start all applications specified in the original `mysystem.rel` file, use the `-boot` flag as follows:

```erlang
/usr/local/erl-target/bin/erl -boot /usr/local/erl-target/releases/FIRST/start
```

We start a simple target system as above. The only difference is that also the file `releases/RELEASES` is present for code replacement in run-time to work.

To start an embedded target system the shell script `bin/start` is used. That shell script calls `bin/run_erl`, which in turn calls `bin/start_erl` (roughly, `start_erl` is an embedded variant of `erl`).

The shell script `start` is only an example. You should edit it to suite your needs. Typically it is executed when the UNIX system boots.

`run_erl` is a wrapper that provides logging of output from the run-time system to file. It also provides a simple mechanism for attaching to the Erlang shell (`to_erl`).

`start_erl` requires the root directory (“/usr/local/erl-target”), the releases directory (“/usr/local/erl-target/releases”), and the location of the `start_erl.data` file. It reads the
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run-time system version ("5.1") and release version ("FIRST") from the start.erl.data file, starts the run-time system of the version found, and provides -boot flag specifying the boot file of the release version found ("releases/FIRST/start.boot").

start.erl also assumes that there is sys.config in release version directory ("releases/FIRST/sys.config"). That is the topic of the next section (see below). The start.erl shell script should normally not be altered by the user.

1.3.5 System Configuration Parameters

As was pointed out above start.erl requires a sys.config in the release version directory ("releases/FIRST/sys.config"). If there is no such a file, the system start will fail. Hence such a file has to added as well.

If you have system configuration data that are neither file location dependent not site dependent, it may be convenient to create the sys.config early, so that it becomes a part of the target system tar file created by target_system:create/1. In fact, if you create, in the current directory, not only the mysystem.rel file, but also a sys.config file, that latter file will be tacitly put in the appropriate directory.

1.3.6 Differences from the Install Script

The above install/2 procedure differs somewhat from that of the ordinary Install shell script. In fact, create/1 makes the release package as complete as possible, and leave to the install/2 procedure to finish by only considering location dependent files.

1.3.7 Listing of target_system.erl

-module(target_system).
-include_lib("kernel/include/file.hrl").
-export([create/1, install/2]).
-define(BUFSIZE, 8192).

%%% Note: RelFileName below is the *stem* without trailing .rel, %%.script etc.  
%%% create(RelFileName)

create(RelFileName) ->
    RelFile = RelFileName ++ ".rel",
    io:fwrite("Reading file: \"~s\" ...\n", [RelFile]),
    {ok, [RelSpec]} = file:consult(RelFile),
    io:fwrite("Creating file: \"~s\" from \"~s\" ...\n",
               ["plain.rel", RelFile]),
    {release, 
      {RelName, RelVsn}, 
      {erts, ErtsVsn}, 
      AppVsns} = RelSpec, 
    PlainRelSpec = {release, 
                    {RelName, RelVsn}, 
                    {erts, ErtsVsn}, 
                    AppVsns},
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```erlang
lists:filter(fun({kernel, _}) ->
    true;
   ({stdlib, _}) ->
    true;
   (_) ->
    false
end, AppVsns)
},
{ok, Fd} = file:open("plain.rel", [write]),
io:fwrite(Fd, "p."n", [PlainRelSpec]),
file:close(Fd),

io:fwrite("Making \"plain.script\" and \"plain.boot\" files ...\n"),
make_script("plain"),

io:fwrite("Making \"s.script\" and \"s.boot\" files ...\n"),
make_script(RelFileName),

TarFileName = io_lib:fwrite("~s.tar.gz", [RelFileName]),
io:fwrite("Creating tar file \"s\" ...\n", [TarFileName]),
make_tar(RelFileName),

io:fwrite("Creating directory \"tmp\" ...\n"),
file:make_dir("tmp"),

io:fwrite("Extracting \"s\" into directory \"tmp\" ...\n", [TarFileName]),
extract_tar(TarFileName, "tmp"),

TmpBinDir = filename:join(["tmp", "bin"]),
ErtsBinDir = filename:join(["tmp", "erts-" ++ ErtsVsn, "bin"]),
io:fwrite("Deleting \"erl\" and \"start\" in directory \"s\" ...\n", [ErtsBinDir]),
file:delete(filename:join([ErtsBinDir, "erl"])),
file:delete(filename:join([ErtsBinDir, "start"])),

io:fwrite("Creating temporary directory \"s\" ...\n", [TmpBinDir]),
file:make_dir(TmpBinDir),

io:fwrite("Copying file \"plain.boot\" to \"s\" ...\n",
filename:join([TmpBinDir, "start.boot"])),
copy_file("plain.boot", filename:join([TmpBinDir, "start.boot"])),

io:fwrite("Copying files \"epmd\", \"run_erl\" and \"to_erl\" from \n""
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```

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```
StartErlDataFile = filename:join(["tmp", "releases", "start_erl.data"]),
io:fwrite("Creating \"s\" ...\n", [StartErlDataFile]),
StartErlData = io_lib:fwrite("s ~s\n", [ErtsVsn, RelVsn]),
write_file(StartErlDataFile, StartErlData),

io:fwrite("Recreating tar file \"s\" from contents in directory "
"tmp\" ...\n", [TarFileName]),
{ok, Tar} = erl_tar:open(TarFileName, [write, compressed]),
{ok, Cwd} = file:get_cwd(),
file:set_cwd("tmp"),
erl_tar:add(Tar, "bin", []),
erl_tar:add(Tar, "erts-" ++ ErtsVsn, []),
erl_tar:add(Tar, "releases", []),
erl_tar:add(Tar, "lib", []),
erl_tar:close(Tar),
file:set_cwd(Cwd),
io:fwrite("Removing directory \"tmp\" ...\n"),
remove_dir_tree("tmp"),
ok.
```

```
install(RelFileName, RootDir) ->
    TarFile = RelFileName ++ ".tar.gz",
io:fwrite("Extracting ~s ...\n", [TarFile]),
extract_tar(TarFile, RootDir),
StartErlDataFile = filename:join([RootDir, "releases", "start_erl.data"]),
{ok, StartErlData} = read_txt_file(StartErlDataFile),
[ErtsVsn, RelVsn] = string:tokens(StartErlData, "\n"),
ErtsBinDir = filename:join([RootDir, "erts-" ++ ErtsVsn, "bin"]),
BinDir = filename:join([RootDir, "bin"]),
io:fwrite("Substituting in erl.src, start.src and start_erl.src to\n""form erl, start and start_erl ...\n"),
subst_src_scripts(["erl", "start", "start_erl"], ErtsBinDir, BinDir, [["FINAL_ROOTDIR" RootDir], ["EMU", "beam"],
[preserve]],
io:fwrite("Creating the RELEASES file ...
"),
createRELEASES(RootDir,
filename:join([RootDir, "releases", RelFileName]))).
```

%% LOCALS

%% make_script(RelFileName)
%% make_script(RelFileName) ->
    Opts = [no_module_tests],
    systools:make_script(RelFileName, Opts).

%% make_tar(RelFileName)
%% make_tar(RelFileName) ->
    RootDir = code:root_dir(),
    systools:make_tar(RelFileName, [erts, RootDir])

```

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%% extract_tar(TarFile, DestDir)
%%
extract_tar(TarFile, DestDir) ->
erl_tar:extract(TarFile, [{cwd, DestDir}, compressed]).

create_RELEASES(DestDir, RelFileName) ->
release_handler:create_RELEASES(DestDir, RelFileName ++ ".rel").

subst_src_scripts(Scripts, SrcDir, DestDir, Vars, Opts) ->
lists:foreach(fun(Script) ->
    subst_src_script(Script, SrcDir, DestDir, Vars, Opts)
end, Scripts).

subst_src_script(Script, SrcDir, DestDir, Vars, Opts) ->
subst_file(filename:join([SrcDir, Script ++ ".src"],
filename:join([DestDir, Script]),
Vars, Opts).

subst_file(Src, Dest, Vars, Opts) ->
{ok, Conts} = read_txt_file(Src),
NConts = subst(Conts, Vars),
write_file(Dest, NConts),
case lists:member(preserve, Opts) of
    true ->
        {ok, FileInfo} = file:read_file_info(Src),
        file:write_file_info(Dest, FileInfo);
    false ->
        ok
end.

%% subst(Str, Vars)
%% Vars = [{Var, Val}]
%% Var = Val = string()
%% Substitute all occurrences of %Var% for Val in Str, using the list
%% of variables in Vars.
%%
%% subst(Str, Vars) ->
%% subst(Str, Vars, []).

subst([%, C| Rest], Vars, Result) when $A =< C, C =< $Z ->
    subst_var([C| Rest], Vars, Result, []);
subst([%, C| Rest], Vars, Result) when $a =< C, C =< $z ->
    subst_var([C| Rest], Vars, Result, []);
subst([%, C| Rest], Vars, Result) when C == $_ ->
    subst_var([C| Rest], Vars, Result, []);
subst([C| Rest], Vars, Result) ->
    subst(Rest, Vars, [C| Result]);
subst([], _Vars, Result) ->
    lists:reverse(Result).

subst_var([%| Rest], Vars, Result, VarAcc) ->
    Key = lists:reverse(VarAcc),
    subst(Rest, Vars, [Key| Result]).
case lists:keysearch(Key, 1, Vars) of
    {value, {Key, Value}} ->
        subst(Rest, Vars, lists:reverse(Value, Result));
false ->
    subst(Rest, Vars, [$\%$| VarAcc ++ [$\%$| Result]])
end;
subst_var([C| Rest], Vars, Result, VarAcc) ->
    subst_var(Rest, Vars, Result, [C| VarAcc]);
subst_var([], Vars, Result, VarAcc) ->
    subst([], Vars, [VarAcc ++ [$\%$| Result]]).
copy_file(Src, Dest) ->
    copy_file(Src, Dest, []).
copy_file(Src, Dest, Opts) ->
    {ok, InFd} = file:rawopen(Src, {binary, read}),
    {ok, OutFd} = file:rawopen(Dest, {binary, write}),
    do_copy_file(InFd, OutFd),
    file:close(InFd),
    file:close(OutFd),
    case lists:member(preserve, Opts) of
        true ->
            {ok, FileInfo} = file:read_file_info(Src),
            file:write_file_info(Dest, FileInfo);
        false ->
            ok
    end.
do_copy_file(InFd, OutFd) ->
    case file:read(InFd, ?BUFSIZE) of
        {ok, Bin} ->
            file:write(OutFd, Bin),
            do_copy_file(InFd, OutFd);
        eof ->
            ok
    end.
write_file(FName, Conts) ->
    {ok, Fd} = file:open(FName, [write]),
    file:write(Fd, Conts),
    file:close(Fd).
read_txt_file(File) ->
    {ok, Bin} = file:read_file(File),
    {ok, binary_to_list(Bin)}.
remove_dir_tree(Dir) ->
    remove_all_files(".", [Dir]).
remove_all_files(Dir, Files) ->
    lists:foreach(fun(File) ->
        FilePath = filename:join([Dir, File]),
        {ok, FileInfo} = file:read_file_info(FilePath),
        ... end.
case FileInfo#file_info.type of
directory ->
  {ok, DirFiles} = file:list_dir(FilePath),
  remove_all_files(FilePath, DirFiles),
  file:del_dir(FilePath);
  ->
  file:delete(FilePath)
end
end, Files).
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