

Evergreen International Online Conference 2020

Thursday Track 1

June 11, 2020

Dev Update

>> DEBBIE LUCHENBILL: Good morning-- or good afternoon depending on where you are. On behalf of the Evergreen international conference committee and outreach committee, I would like to welcome you to day three of the Evergreen international online conference. We would like to thank Mobius for sponsoring track one today and equinox open library initiative for sponsoring the closed captioning for the conference. If you are not familiar with Zoom's webinar controls please take a moment to acquaint yourself with them now. Feel free to use the Q&A or chat for questions or use the raise and button to be called to speak. The chat is a good place to make comments and interact with other attendees but if you are not familiar, in the chat window, please choose a drop-down to all panelists and attendees, otherwise you'll just be sending messages to the panelists. This session is being recorded, and the recording will be available on the Evergreen project YouTube channel after the conference sometime. Without further ado, I would like to introduce Galen Charlton, who is going to begin developers update.

>> GALEN CHARLTON: Okay, greetings everybody. Thank you for taking the time to attend. And to learn more about what the Evergreen development community has been up to.

Of course, in many respects, it has been a strange year and a strange past few months in particular. But the work of the project continues, of course. Since the previous conference, we have achieved major releases for both OpenSRF and Evergreen. Evergreen 3.4.0 came out in October, at the same time, we did a release of OpenSRF 3.2.0 and the Evergreen 3.5 cycle is underway. With the beta release released in March with work proceeding for the general release later in the next few days.

More about 2.5 will come later during the presentation, where the code release manager Chris Sharp will be speaking.

This development update session, which we have been holding for several years, has lent itself to Evergreen's own calendar, in particular, we have been going from one conference to the next as the reporting period for development.

One of the things that I like to do with these updates is to talk a little bit about the numbers. Now, of course, in one sense, we might be cheating a little bit since, due to the unfortunate cancellation of the in-person conference, we have had a few more weeks when that would have been held and this online conference. By the way, big shout out to the Evergreen outreach committee for organizing this online conference at effectively the last minute.

As far as Evergreen development is concerned, we have been keeping up a steady pace. The numbers for this cycle are comparable to the numbers for last year. So, 781 individual commits and evergreens master branch since the conference in Pennsylvania. With a total of 49 patch authors.

One thing I should mention is both Evergreen documentation updates and code updates are stored in the same code repository, so the commit and patch author accounts, in fact, both coding work and documentation work. And that is a very appropriate thing since code and documentation necessarily-- or at least should -- go hand in hand.

The work of coding, force, also needs a lot of checking. So many, many thanks to the 66 people who have helped participate in direct testing by signing off after reviewing patches.

In addition to the input, the output for the cycle has been two OpenSRF releases including betas and 23 Evergreen releases, including beta releases. And that includes major releases which come out twice a year, one in the spring and one in Autumn. As well as maintenance releases.

One of the things about the development immunity is that it is not just a matter of people on the one handwriting code, then passing the code over to the people writing the documentation and then tossing it back in an eternal game of ping-pong. This is a project that tries to bring in far more people to do the very important task of testing the changes that get made. One of the mechanisms that we use to do this is bug squashing week. A great big shout out to Terran McCanna of the Georgia Public Library service for organizing these bug squashing weeks.

What is a bug squashing week? It is an organized event, where critical bugs get identified. The fixes get made available on staging servers and shout out to the MOBIUS consortium for doing an excellent job of putting up staging systems. And inviting people during an intensive week to

go through -- look at the fixes and see which ones work and ensure they get signed off and merged into Evergreen.

There were two primary bug squashing weeks since the previous conference. One in May 2019, and another in September 2019. There was also an effort to do one in March, although events ran into that.

What happens in a bug squashing week? Bugs get reported, people comment on the bug tracking system called Launchpad. Patches get submitted to update those bugs and how they address them. And in some cases patches that had been submitted a while back get updated to ensure they work against the current state of the Evergreen code base. And patches also get signed off and I'm there, they get merged--- from there they get merged into the core, and subsequently get released.

So, the efforts have been healthy in the past couple of bug squashing weeks. There's a tiny bit of squeaking us in that new bugs have been reported and the number of participants in the bug cycles were the same. Now bug squashing of course, is something that is also a background activity of the community, obviously, you can fix a bug or bug folks at any time. Bugs watching weeks is an excellent opportunity to get concentrated effort onto the ongoing task of flattening or-- these bugs.

Bug squashing week is not the only way of addressing -- or doing concentrated feedback. Another event that has been done is the so-called feedback fast. This is a different event than bug squashing week in that it intentionally aims at addressing the queue of pull requests or changes to the Evergreen code base that stack up as bugs get fixed but also as new features get developed. So the notion for feedback fast, there is a focus on the pull requests, and we go through as a community, although feedback fast is developer centric, and figure out which ones can be merged and figure out which ones may need additional work.

In both cases, there is again this slightly creepy numeric synchronicity in both the May and July timeframes. We have 55 pull requests that got some sort of action on them. An average about 20 pull requests merged in each cycle. So, one thing I will say, and I should have said this at the beginning of the update, is if you have questions about any of the jargon I am using, please do not hesitate to ask. You know, the chat or the Q&A feature.

There were two feedback tests-- fests, festi? leading up to Evergreen 2.4 but there was also a feedback fast--fest for the 3.5 cycle in February with quite a few patches signed off, 31 merged, and a number of bugs that got feedback.

You know, both bug squashing week and the feedback fest are an important way of helping to ensure the work of developing Evergreen continues to move forward.

I would like to give a shout out to everybody who collectively dissipated in bug-- participated in bug squashing weekend feedback fest, and a special shout out to the new developers group.

One of the things that I think makes the Evergreen community --great is development is not purely the domain of the people writing the code, it is something where we are looking to have everybody who has an interest in using Evergreen, be able to participate in the development process and to give feedback.

Now, there is also a hidden agenda between -- behind bug squashing weekend feedback fest, the documentation code and feedback patches and I want to give a shout out to these people that have identified as being first time code or documentation patch offers since last year's conference, you know, many thanks to these intrepid people. And I hope I got it right. If your name should be on here please do not hesitate to reach out to me and I will make sure that it shows up on the final version of this slide deck that will be put on the Evergreen website.

You know, again, this is something that you too can join this list. The healthy -- we would be happy to have many.

If you have an interest in writing code or writing documentation or both, please do not hesitate to reach out. Specific ways you can do so is writing to the Evergreen development mailing list or joining the documentation interest group are participating in the IRC channel. Also any of the coordinators and DIG people would be happy to be contacted as well.

Moving on with this, I would also like to give a shout out to Jeff Davis of the BC Libraries Coop in British Columbia who during this cycle was named our newest core committer, so many thanks to Jeff for years of solid development work and being nominated as a committer.

And I agree, Chris, we should have an applause feature on Zoom.

Now that we have talked about the most important part of this presentation, namely, the people who are contributing to making Evergreen awesome, let's move on to discussing the effort -- what the effort is focused on. I will talk a bit about Evergreen 2.4,--3.4 what made it into the release, and give a very brief peek at some of the functionality. And then after I talk about Evergreen 3.4, we will lean on Chris Sharp and Bill Erickson as co- release managers of 3.5 to talk about 3.5.

But onto Evergreen 3.4. One of the significant new features was 12 agent billings and payments. Aging in this context is Evergreen's feature to separately link between a transaction and that patron who made it, to help promote and protect patron privacy. Evergreen has for many years had features to age loans and hold requests on a schedule controlled by the library or consortium. Bill Erickson spearheaded a feature to apply this to billings as well, namely once a patron has concluded their financial location to a library, they should not be followed around indefinitely so many thanks to Bill for devising the future and also many, many thanks to Jason Stephenson for leading the effort to resolve some bugs with the initial deployment of that feature.

Another feature of note is an Action Trigger event definition, for fines, to give them a notification if a patron is owing privileges would be suspended because they have hit the limit set by the library for the fine balance standing penalty.

Another big theme of Evergreen 3.4 was Angularization, this does not mean it is being turned into something spiky and sharper. It is rather the ongoing effort to modernize the web staff interface, using the Angular JavaScript framework. New interfaces that were converted to angular during the three forced cycle include various administrative interfaces including the organizational unit, standing penalty and permission group, admin pages as well as most of the local administration in general. A new future was also devised to do server managed print templates grade this is a work in progress but when it comes to full fruition it will make it easier to do things like define templates-- receipt -- templates. And whenever user is using the same template.

There has also been a fair amount of work improving the Angular upgrade including adding support for filtering fields on the grids.

I want to step back one moment and surface something from the chat and give a shot shout out to John Anderson who did work with testing and web fixing for billing aging.

Jumping onto other things in Evergreen 3.4, the Angular staff catalog got several updates including a new tab for listing holds on a title, a browse feature and features to set up search templates so you could repeat searches and keep a list of past searches in the staff interface.

Another big aspect of Evergreen 3.4 was a refresh of the booking module. Led by Jane Sandberg which resulted not only in the booking module looking much better but turning it into something that I think many more libraries will start to adapt. So kudos to Jane for leaving that effort.

Another feature in Evergreen we .4 because we should not forget about the after all. If patrons-- is the booking carousels to OPAC. And configuring what details about fines can be mitigated over the SIP server which will make the lives of people setting up and using various third-party payment gateways easier. To avoid things like the patrons being told, hey, the library three -- and what those fees are for. You can service another shout out is one to Christina Burns for also doing work on the module -- refresh. There are no cat pictures in the deck and I apologize.

We have an opportunity for a bad pun MeV the cataloging features in 3.4 do you have some nice little additions including the ability to back out of and edit if your back if you are editing a record in the record merge interface, the ability to export records from the staff catalog basket, some additional -- options for overlay during copy import. And just laying codes in the physical characteristics wizard. If we move on to some of these screenshots, this is an example of one of the new booking interfaces. In this case the Angular interface for managing reservations.

For the staff catalog, what we have here are examples of the holds tab in the Angular staff catalog. An example of the drop down for setting up a search template. So this search template in the example will, is set up to pre-fill the search form to limit them to sound recordings as well as a screenshot of the Angular browse looks like.

I don't have an actual cat cameo -- sadly I have my door close but there may be possibilities for a cat cameo.

Let's take a look at the carousels. This is an example from a library in Pennsylvania actually using the carousels, they currently have this displayed on the OPAC homepage. For this they have set it up to display new items. But the carousels feature has flexibility beyond that, you can set up a carousel that you maintain manually with the contents of the record bucket, they can display recently circulated items, as well as new items. Carousels can be cycled through manually by the patron hitting the next or previous button, they can also be animated.

Chris, do not encourage my cats to crawl through the ventilation. Let's look at cataloging, what we have here are examples of exporting records from the basket in the staff interface. The cancel -- merge interface as well as the physical characteristics wizard, displaying not only the label of a fixed field value, but also the code.

Jumping forward to the Angular administrative interfaces, we have examples of the permission group interface. As you can see the various profiles on the left-hand side as well as interfaces for setting the permissions that apply to that profile.

The working editor, again, has a similar tree of organizational units and you can set things like the org unit name, hours of operations and addresses. But one of the big benefits of the Angular unit interface it is much improved. As well we have a screenshot of the part of the index page for local administration.

That is it for 3.4. So, at this point, I would like to have Chris Sharp and Bill Erickson took a bit about 3.5 and just let me know what you want me to advance the slides.

>> CHRIS SHARP: I will speak for a moment about my experience being a co- release manager which is a new model for managing releases. This was suggested back at the hackaway in November in Indiana to both take the load off the main release manager and to provide an opportunity people who had not done the job before to learn without having it foisted on them with no--no training or examples. So our original release schedule at Evergreen 3.5 heading towards March.

I will step back and say a lot of you all know this but Bill Erickson and I grew up in the same hometown and we knew each other as children. We went to different school system so we didn't see each other for a long time and reacquainted ourselves with in the Evergreen world but it was a pleasure working with Bill and I've always seen him to be competent and a great leader in the community so I was excited to get that opportunity to work with Bill on this project.

Unfortunately, the March release schedule was shot to pieces as was everybody's March schedules. Because of the pandemic. So, several things got pushed back. I think Jason Stephenson said earlier in the chat that the final release, I agree, will be better for the delay because we had a few things to work out but there are exciting features and I will hand it over to Bill to talk about those.

>> BILL ERICKSON: Thank you, Chris, for the kind words and I agree, the corm was a good idea and I look forward to working with that in the future. Everyone got scattered to the wind in the last few months and there were a lot of things people were working on dealing with and it did force us to delay the release. I also agree that the final product will be significantly better because of it. We were able to get quite a bit more bug fixes in that would -- X would not have made it into a later release -- I will mention some of the features that were -- we are looking forward to in 2.5.--3.5 next slide, please.

We will start with a bullet here and we will look at some screen caps of these afterwards. An action trigger hook for patient self-registration had we have an interface and Evergreen Regency depending patients that have registered via the online form and it's possible to set up notifications of staff can be notified of these and so it is not necessarily require that they check the interface. Another continuing theme of course is the Angularization, making things pointy. We already had partial MARC editor support in Angular as part of the Angular -- the experimental Angular catalog and now at 3.5 we have the enriched MARC editor, the full or Front editor or the main editor but this is the one at gives you the sort of context information and the fixed fields which have been broken out in a way that makes it easier to edit or gives you more guidance.

Other staff catalog changes -- the search highlighting was ported over and that's or recent addition to Evergreen in general and now it is brought over to the staff catalog as well. There had been a button in the catalog that was disabled for searching for patients during holds

placement and be enabled the button [Laughter] and behind that button actually is a dialogue that allows you to search for patrons. And then to select a patron for which to place a hold from the catalog.

Another one -- there was a lot of enthusiasm around -- was there record detail phase, there were tabs for holds and holdings maintenance now there's another one that shows the patron view since the staff catalog is different than the patron catalog, we wanted to make it easy for staff at a glance to see what the patient will see for a specific record.

That was added. The update hold notification information, I am happy about this and it is-- as been in discussion and IRC for years and I was glad to see this was finally coded and added then we will see a picture of it in a second but the general ideas we stamp old requests, the phone notification number, and if the patron later changes the phone number there are various entry points where you could say hey, you have a hold that will use a different phone number do you want us to use the new ones of those can be updated in batch at the time the phone number is changed.

Lastly, there are hooks that have been added to make the patron catalog easier to sort of the May style to your local needs via CSS without having to get quite so involved in the code itself, you can sort of add CSS to make simple tweaks.

We have pictures of some things I mentioned. We have the search highlighting, it will be similar to the way the patron catalog handles that. And then on the right is another view of the search highlighting and below that is a view of the patron you tab. So, it essentially gives you a picture of the patient catalog right under that tab in a read only frame so you can compare that to what you see in the staff catalog.

The button I mentioned before, that was disabled and now enabled, the search for patron button in the staff catalog holds placement form.

Various shots of the Angular MARC editor, it brings overall functionality of the MARC editor we know and love. We have the physical characteristics wizard, it walks you to the 007 compilation, the context menus are there. That will be in for various tags and subfields and sometimes the actual content of the field and we have the authority links so this -- as before -- this will launch a

form from the MARC editor for a controlled field and bring up the authority browse and let you go through there and select from existing options or create new authority records for the bib record.

Here is the hold notification updates. At the top, we have catalog view, and this is a situation where the patrons can apply the updates and then below we have staff view where the staff can apply the updates at a number change time basically.

At this point, I'll hand it back to Galen but before you want to give huge thanks to Galen for corralling this whole presentation, as always, I really appreciate it, back to you, Galen.

>> GALEN CHARLTON: Thank you very much. I'm going to take the baton and immediately and it too broken to talk a bit about the hackaway.

>> ROGAN HAMBY: The hackaway is an annual event where the developers sort of put the screens to the side and meet face-to-face and for about 2.5 days' work, in a concentrated fashion but also get to remove the impediments of IRC and email and all those other things, and have live discussions, both to do specific work and you will see that reflected in the numbers here. The last line at the bottom that says a great deal of coffee and discussion, encompasses a lot of what the hackaway is about and we had a lot of great discussions this year, Blake presented earlier in the conference on Antora and a lot of the discussion happened at the hackaway. There were a lot of discussions about the call release manager which Chris talked about and has borne fruit as well as architectural things related to Evergreen itself so I want to thank Evergreen Indiana, they are the hosts every other year and amazing. They deserve all the applause in the world for what they do for us in the Evergreen community.

We will be back there -- knock on wood if you have actual wood near you -- the world will be in shape so we can be back there next year.

That brings us to what about the hackaway this year? There was serious consideration to canceling it. The public health situation is still evolving in the US. We do not know what it will look like by October. But after deliberation and discussion, there seems to be a feeling that there was a desire to have some event even if it was not as ideal as having people meet in person.

Honestly, since the hackaway first began, electronic meeting tools have become much better and they have become better in just the last few months due to the pressure and need for them and greater society.

What I will be doing is in early July, after the conference is over and dust has settled, I will reach out to a group of volunteers, these are not selected yet so feel free to volunteer yourselves. We will start planning the online hackaway. My main criteria for this are I will be looking for tools that are not top-down driven, in other words not creating a strict schedule or regimented group of presentations. But will allow people to easily move from group to group and self-create working groups to facilitate what the hackaway has always been which is very much user and participant driven bid so that is all I have for now but I will be sending out more to the mailing list in early July. Thank you, Gail and I will toss it back to you.

>> GALEN CHARLTON:, Thank you, Rogan. Give me a moment let it not be said I don't occasionally bow to popular pressure.

First, I would like to thank everybody for their time and attention. And it looks like that we have a few minutes for any questions that would like to ask about Evergreen development. You can do so via chat or via the Q&A feature.

>> DEBBIE LUCHENBILL: We have one person with their hand up. Laura, I have on me to do if you would like to ask a question.

>> LAURA: That was an accident. I am sorry.

>> DEBBIE LUCHENBILL: No problem.

>> GALEN CHARLTON: Andrea asks, is that George doing a downlow high five? I think I took that picture after interrupting Freddie, the one on the left, in the process of grooming George the kitten.

Okay, well, not same any other questions. Again, I would like to thank everybody for their time and attention. I see that Rogan is getting a lot of volunteers to help out with the hackaway so these do not hesitate to reach out to him. I would also like to thank everybody involved in the Evergreen development project for spending a lot of time, energy and passion in service to libraries and their patrons. So thank you very much. And onward to the next set of presentations.

>> DEBBIE LUCHENBILL:, Thank you Galen and Chris and Bill and Rogan for that informative presentation per thank you for attending, the next session will start on the hour, 1 PM Eastern, 12 Central, 10 Pacific. If you would like to continue chatting, in that chat we are recording through this whole thing. So feel free to continue to interact with one another and we will be back here for the consortium leaders Roundtable, is next on the track. Thank you.