THE EVERGREEN PROJECT

BUILDING OUR COLLAGE: HOW EVERGREEN’S DOCUMENTATION WORKS

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>> Okay, everybody. It's just about 1:00. We are going to get started. This is track two. If you're looking for part one, I will put that in the chat. My name is Gina. Will be moderating this room. Just a reminder that it is recorded. So anything that appears on screen here will be recorded for your viewing afterwards. And we would like to thank our sponsors first. We would like to think the Evergreen initiative for making this possible. And also for Mobius for being the sponsor for captioning. There is captioning in this track and I have posted a link earlier and I will throughout the presentation.

If you have any questions for our presenter, Jane, thank you so much for putting together this presentation for us, Building Our Collage: How Evergreen's Documentation Works. So if you have any questions for her, but them in the chat and I will make sure she receives them. If you have any general questions, you can look at the event portion of your chat board.

I think that's everything whenever you're ready, Jane, you can get started.

>> Thank you so much, Gina. Thanks for the great introduction and all the work you have been doing behind the scenes. So I am going to try to share my screen. Let me see if I can get this into presenting mode.

All right. Is that screen showing up for everyone?

>> The screen is coming up for us.

>> Great. Thanks, everyone for being here. Thanks for watching me figure out the platform. This talk is called building our collage. The reason I'm talking about collages is I think it's a good way to think about the documentation that Evergreen has. So over 100 people have contributed to Evergreen's documentation of the years. Bits and pieces have been taken from other existing documentation as far as new documentation kind of woven together. And all those different pieces come together to form this big nevus of whole.

I got really excited about this collage idea, and each of the slides does have a collage on it. Those are licensed collages that I found on twitter. So there is metadata and the licensing information on each collage you see in the background.

For example, this collage that you see is called today's progress on circle. And it's license for sharing.

The slides are also very busy. There is a lot going on, and if you first nothing simpler, I also have an alternate format which is available at -- I will show you what that looks like. So each slide has its own second-level heading so you can keep track of the slides that we, and it just has bullet points giving the information on the slide and the first bullet point is always information about the collage so you can enjoy it on your terms. I will quickly put that link into the chat.

And then I'm going back to the slides.

Moving on to the slide called session plan, here is what we are going to be doing for the next 40, 45 minutes. For this presentation, I was asked to walk through the entire process from start to finish, what it takes to improve a piece of documentation for Evergreen or add to a piece of documentation. And the first thing that sprang into my mind was, I'm thinking about Schoolhouse Rock, and how they had that cute video where the bill becomes a law. So what if I wrote my own Schoolhouse Rock, the Evergreen documentation. Accessible ideas on what has and that becomes a beautiful Evergreen manual. It will be so catchy. All the stuff stuck in everyone's head period will be able to put my degree to use.

That never happened. Instead, we will be looking at the human processes that go into making Evergreen's manual step-by-step. And I'm really wanting to focus on what we as people do to contribute to Evergreen's documentation. There is other information about how the machines help us out, how to use Antora, how to navigate GitHub. That into information that necessary as well. Today I want to focus on what we as people do.

I'll be sure to point out ways that you can get involved in intervening to these processes, contributing content to the Evergreen documentation. As well as how you can contribute to improving the process that we have to build this documentation.

We also take a look at the Evergreen documentation that exists outside of the official, and explore other documentation that is within the Evergreen ecosystem.

This is going to be an interactive session. I want to let you all know, we will be actually doing some of these processes are ourselves. A lot of times that will be in the chat room. So prepare yourselves for that. Make sure you're at the chat window and able to participate.

And I'm also going to take 10 seconds at the end, talking on each slide, so we can all enjoy the collage together.

All right. This slide is called four types of documentation. Today I divided Evergreen's documentation into four types. First, there is the Evergreen manual for we will be spending most of our time today. The second I wanted to look at is contextual help. The third is going to be release notes, and the fourth will be documentation that is for developers, not end-users.

Unjustly to open up the Evergreen manual so we have a good visual of what that looks like. I will also throw the link into the chat.

So in broad strokes, there are or steps to adding some new information or providing some existing information in the manual. Step 1 is that a contributor will identify and figure out that there is a gap in the documentation. And go ahead and report that period secondly, it could be the same contributor or another contributor, will actually create the documentation are compiled from some other sources. Get all prepared to be included into the documentation.

The third step is that the contributors will submit that documentation for review. And the fourth step is the documentation committers will review that documentation and incorporate the submissions that are ready.

So step 1, contributors identify and report a gap. We will get more into that process, especially reporting a gap one place it can be reported is on the official Evergreen wiki. So there is this growing list of Evergreen documentation needs. Often times when there is a new release, we will put it into features, and say this feature came in but we don't have enough documentation in the manual for it.

Another place that those gaps can be reported is on watch had, which is Evergreen's official checker. So it is under this tag called documentation. I'm going to open up here and show you some of those documentation gaps that have been identified as well.

Both of those are things that require log in, and familiarity with the system and how we set up. I think one potential improvement is to figure out a lower barrier way for folks to report gaps as they are using Evergreen documentation and make sure that that is publicized pretty widely so that folks without the logins and experience can say you need a chapter on this.

All right. So we are up to our first activity, which has to do with identifying and reporting those gaps. So we are going to divide into teams for this activity. So if you are familiar with either launchpad or the Evergreen wiki, if you already have a log in there, you are automatically on team 2. If you don't have those things or you don't remember your password, you are going to be on team 1. What team 1 will be doing is it's going to be kind of like a really race with team 1 working first. So team 1 will think back on something that has confused you or some of your colleagues or other people you talk to about Evergreen. Something that you just a quite understand.

Then go ahead and certainly manual to see if it's covered in the manual or not. Once you have found something that is not covered, go ahead to the chat and put in that gap that you have identified. Then sit back. Your work is done and you can enjoy this collage.

Team 2, what you will start out with is sitting back and enjoying the collage. Once team 1 has started putting some of those gaps into the chat, what I need for you to do is write a chat message to claim that gap so that other folks know you are working on it. And then make sure to get that back into wiki or launchpad. Are there any questions about this activity? Gina, could you check the chat to see if there are questions?

>> Sure appeared no problem. Nothing just yet. I will chime in if someone does.

>> Sounds good. I think we can get started. Team 1, take it away.

>> We have a question to clarify the teams again.

>> Team 1 is if you don't have log in to the wiki or to launchpad or if you're not feeling familiar with those platforms. Team 2 are folks who do have access, are feeling confident about those platforms. Let's take about 7 or 8 minutes to do this project.

>> We have a question about is it all right to just observe?

>> It's all right, but I would encourage you to even if you don't want to be doing the chat interaction please, I encourage you to follow along with the steps if you're able.

(The activity was performed.)

I'm going to stop sharing for a moment so I can hop into the chat.

>> Here is one. For staff accounts, can staff reset their own passwords or is that ability restricted to admins? I'm not quite sure from the docs which one is expected behavior.

>> That's a fantastic question. Does anyone want to take care of that? I run into that all the time. Thanks, Jennifer.

>> We have one from Donna. I have been told that patients can turn on circulation tracking on their side of the platform. I can't find the documentation that describes how peers just to clarify, is that in the open catalog? So circulation history on their accounts. Jamie that's a great question on how you search the manual. Let me share my screen and we can look at that together. That would be pretty useful for this whole process. Once you're in the manual, you can go up to search docs, and you can say funds, and it will give you a list of results that will pop up here and you can click on them to get to that part of the manual. Make sure that what you're looking for is listed. I think we will wrap it up in about three minutes. So if you're on team 1, be sure to put your things in the chat, the gaps that you found. And team 2, just keep watching that chat and listening to Gina and making sure you are grabbing those opportunities to record those gaps that they found.

>> It's possible -- someone put in the link for the document, the manual. Thank you.

Lynn took another one that was in regards to end in current image or film, and it was for the -- remake. So thank you for doing that.

One minute warning.

>> We got one from Allison, in exporting templates, it's not clear that when you export, you are exporting all templates in one file. There is a link to that.

>> I'm going to start moving us forward, but feel free to wrap up and continue your work on team 1 or team 2 in the background.

Moving on to the slides called step 2, contributors create or compile documentation. This documentation can be sourced from local documentation. If you see levers corporate, one example that comes to mind, there's a library that has some wonderful, fantastic documentation that has made its way into the Evergreen manual. It can be coming from release notes that are included with each new Evergreen release. Sometimes those release notes go really in-depth and actually do provide all the information that a system administrator or an end-user might need to know about a particular feature.

Sometimes it's just coming from different e-mails that folks have sent around the community or questions people have had on launchpad or an IRC chat for developers are found on.

And it could be just brand-new documentation.

I think there are some process improvements on this site as well, especially when we are talking about bringing in documentation from other sources. Mike Hawes has been working with open textbooks, that are used in the classroom. We have had faculty members who, with their students, write a textbook themselves point in chapters from other related types of books that are also under open licenses, making those available to the wider community so that other schools and other faculty members can take the chapters that they need, put that into a custom textbook for their students, and since they are all open licenses, it's all three, reducing textbook costs. It's a really amazing project, and we have the documentation group have a lot to learn from them because they are really using for those open licenses to their full advantage pick so I think it would be helpful to streamline the process and have some good written out procedures about how to incorporate other chapters, other information from other sources into the Evergreen documentation and Evergreen manual.

But also make it easier for others to take those chapters for their own local institution. So if your library doesn't use acquisitions, let's make your version of the documentation that doesn't have the active -- acquisitions chapter in it. If your library uses a particular setting, let's make sure your documentation reflect that setting it doesn't confuse it with all of this information about if you have this setting, do this. If you have that setting, do that.

I would love to see a documentation that would just take and make it suited to your local circumstances.

So we have moved onto the slide, activity 2. This will be a lot shorter, and we don't have teams for this one. Everyone will be doing this on their own -- everyone will be doing this by themselves. So please open up a new tab, find some Evergreen documentation online from a source other than the official manual. Try to track down the license information if there is some available for that documentation. And just throw a link into the chat to that documentation and any information you are able to find out about its license. Any questions about this activity? All right. Let's take three or four minutes to do this one.

(The activity was performed.)

This is great. They are really starting to come in now. It's good to see those creative comments license manual set there.

I have moved on to the next slide, step 3. For contributors can submit documentation that they have either created or compiled. There are various ways to do this. The simplest is to just take that documentation that you have prepared and send it to the Evergreen documentation email list. There is a more involved process as well, which is where you actually use the AsciiDoc markup language and create a GitHub pull request, and that allows the committee to easily bring that into the manual using all of our current technology and processes. There is a more advanced way, and the procedures for doing that are within the manual itself as of last week so I thank Lynn for writing those.

There is an activity associated with this step as well. This is an offshore activity. What the activity is, is to choose one of the following things to do. Either sign up for the Evergreen documentation email list so you would email your documentation that you would like to add, or create your own GitHub account and create a fork of Evergreen, which is the first step of that more advanced process. This is optional. Not everybody is very interested in getting more e-mails, not everybody is interested in getting another account. I totally respect that. I'm wanting you to do one of these two if you haven't already. So put into the chat the thing of how to get onto the e-mails. And I want to put into chat the link to get to Evergreen on GitHub for you can click the fork button and set up an account if you need to and have your own version of Evergreen.

And just take two minutes to participate in this activity. If you are interested in doing so. I'm saying this question, what is GitHub? It's one of the places we keep the code for Evergreen and provides a place to have the code but also have all sorts of communication about the code so you can communicate with us and say change this piece of code. So it's the housing and the communication piece. And the documentation is in there with the code as well.

I'm going to move on to step four, where the documentation committees review and incorporate the submissions. The documentation emitters are the photo actually have the power to bring new admissions into the Evergreen manual. There only two of us right now. Myself and Andrea. So one of the process improve is that I would love to see is to have a bigger team that is able to do that.

Another process improvements that I have been interested in is GitHub has these features were you can automatically generate a preview version of the documentation with your own changes whenever somebody proposes a new request. Both the contributor and the creator are looking at the same output. We can see if there are any issues. We can work on that together from the same reference point.

And that is all I will say about that. Because I'm interested in hearing what questions you have so far about the Evergreen manual.

I'm not seeing any questions right now, so I will move on to another piece of documentation that is outside the manual. And that's contextual help. This is summed documentation within Evergreen itself and within Evergreen screens. So that when you have a small question about how do I pull this field or what does it mean when I press this button rather than having to go out, remember the manual, how to get there, remember how to find that particular piece of the manual. Instead, the help is right there.

One tool that the developers have at their disposal to be able to do that in the staff client, is this component called eg-help-popover. I'm going to go into Evergreen itself and show you an example of what that looks like.

So here we are in the booking module, and we want to go to a meeting room, reservation, let's create that reservation. And you can see here, reservation location. What does that mean? You can click on this question mark icon and that will give you a little definition of what that actually means.

So this is the last activity for today. Which is, there is this eg-help-popover, which is using some screens, but a lot of screens could really use it. But they don't have one of those popovers available. So what I'd like to do is I will just going to Evergreen and I will watch the chat to see which screens people want to look for. And let's work together to find one of the screens that could really benefit from some contextual help in one of those little help popovers. Let's try to collaborate on some of the wording of the placement, where we wanted to be. If we have some time we can get that typed up and put it on launchpad so our help popover can actually be in Evergreen.

So what are some screens in the stock client that we think could use like that? I will watch the chat. Pending patrons. This is when I don't know very much about. Kathleen, firstly confusion where you would want to popover? And that's a good one. In the reports module as well. So the interface, I don't think this has a possibility of having a popover. That's a good tip. Meredith, that is a good when it's over. That would be a fantastic place. What does save and clone even mean?

>> Giving patron credit for bills is a good suggestion.

>> I don't know what that means. This checkbox here?

>> It's a checkbox and that will be the credit that will go on to the account that can be used for other transactions. I wrote up some documentation for that just for our own purposes somewhere because it's kind of an involved process. It's not obvious to staff, so I don't really agree with that one.

>> Can we just choose that one and figure out some brief wording that would be helpful to someone who is just, I'm so fuzzy. I don't know what that even means. I just need a refresher.

>> There is also a suggestion for strict barcode.

>> Allison and April chimed in with some great wording. Actually, Allison, with your permission, after this session I will go into launchpad and open up a ticket, get one of those help popovers with a combination of your wording. It seems like we have lots of great ideas about how others -- maybe through the conference we can add to launchpad about -- here's another thing you should have.

Another process in the documentation is release notes. For new features, developers or the development team will provide those along with the code when they submit for approval. For the bug fix releases, it's the release team who is going to create brief notes about each of those bugs that they fix.

And then the developers also have great need for documentation. So they both need that large-scale conceptual information about how the system is set up and how it works together. But also those just-in-time kind of reference documentation as well. And there has been some incredible docking federal effort over the years to make the developer documentation -- meet developer needs as well so I want to give a shout out to Dan Wells, Remington -- for their long-standing efforts in that area, and also Terran McCanna and the new developers group. Thank you so much for making the developer facing documentation accessible and understandable, they are just starting out as Evergreen developers. They have been putting forth incredible efforts.

So that's all I have to talk to you about today. We've got three call minutes left. Any other questions or discussion topics you would like to bring forward?

>> Everyone wants an explanation on strict barcode.

>> I turned it on by mistake the other day, and it was bad news.

What does strict barcode mean? Does someone want to take a stab at that? Thanks, Blake, Jennifer, and Diane.

Thank you so much, everybody, for joining me and embarking in the interactive pieces. I really appreciated your energy and your thoughts about where we can improve the documentation. Looking forward to more information in the conference.

>> Great. Thank you so much again, Jane, for your awesome presentation on documentation. And again, this is a recorded session so there will be a recording available for you to watch again I would like to thank Mobius for the sponsorship of captioning and of course the Evergreen initiative for the platform sponsor. So this is track to go. If you're staying on for the next presentation with Chris Sharp, SysAdmin interest group, that will start at 2:00 p.m. If you are looking for the picture perfect one, that will be in track 1. So I will post that in a moment. We will be back again at 2:00. So I encourage you to look at the Expo center that is still going on. We will see you in a few minutes.