



GIL User Group Meeting

Georgia Southern University

Introduction to Open Source Community Governance

Wilhelmina Randtke & Justin Barnett / 13-14 May, 2024

What We'll Be Talking About

- Ways to contribute with open source
- Specific ways of communicating with open source communities
- Specifics of how FOLIO uses some of those methods
- How to write up and explain a software issue

How to Contribute to an Open Source Community

Time-Based

- Committees
- Bug reports
- Feedback on in-development features
- Testing software releases
- Contributing code
- Writing/revising the instruction manual

Money-Based

- Membership fees to the organization coordinating the open source software community.
 - (Usually, some committees are open to organizational members only.)
- Hiring a consultant to build out a new feature and walk it through.



Community and Technical Aspects

Committees by Another Name

Overview of the FOLIO SIGs

What is a “SIG”? Special Interest Groups

- Subject experts on different aspects of librarianship
- Meetings to determine [better] ways for FOLIO to handle aspects, or dealing with bugs / problems in the current workflow and fixing them.

Why to attend?

If you want to get involved *shaping* the development of FOLIO or see changes made to how it does something.

What are they NOT for?

Help and support. Individually, members may be helpful, but these are not Q&A sessions or training workgroups; look in documentation, contact the mailing list, or hop on Slack.

List of Active Special Interest Groups

Acquisitions

App
Interaction

Consortia

ERM

Implementers

Metadata
Management

Open Access

Privacy

Reporting

Resource
Access

Support

Systems
Operations

User
Management

Workflow

Learn more about SIGs and get involved at:

<https://folio-org.atlassian.net/wiki/.../Special+Interest+Groups>



Specific Communication Tools



GitHub

- Showcasing targeted public contributions: emphasis on public and publishing unique contributions.
- Development vs Operations: GitHub is oriented towards development, not much for operations.
- More of a publishing platform than a working tool.
 - GitHub release vs TarBall release.
 - git language vs GitHub website

Open Journal Systems

build failing Scrutinizer 7.48

Open Journal Systems (OJS) is open source software developed by the [Public Knowledge Project](#) to manage scholarly journals. [Learn More](#)

Usage

Read one of these guides to get started using OJS:

- Read the [Admin Guide](#) to learn how to install and configure the application from an official release package. Use this guide to deploy to production.
- Read the [Getting Started](#) guide to learn how to install the application from this source repository. Use this guide for local development.

Visit our [Documentation Hub](#) for user guides, tutorials, and technical documentation.

Bugs / Feature Requests

⚠ If you have found a security risk or vulnerability, please read our [security policy](#).

All issues should be filed at the [pkp/pkp-lib](#) repository. Feature requests can be made at our [Community Forum](#). Learn more about how to [report a problem](#).

Tarball
release

VS

GitHub



GitHub website vs git language

main 33 Branches 117 Tags

Go to file

Code

asmecher Submodule update 5b7bce6 · yesterday 21,285 Commits		
.github/workflows	ojs ojs main main github actions support	last week
.husky	pkp/pkp-lib#8919 WIP moving from webpack to vite	8 months ago
api/v1	Fix DoiController name typo	5 days ago
cache	pkp/pkp-lib#8922 removed .gitignore file from cache/opcache	last year
classes	Permit single-journal reindexing	last week
controllers	pkp/pkp-lib#9566 Laravel auth system integration	3 weeks ago
cypress	Show locale in url in multilingual contexts	2 weeks ago
dbscripts/xml	pkp/pkp-lib#9860 add editorial masthead nav menu item at ...	4 days ago
docs	pkp/pkp-lib#9566 Laravel auth system integration	3 weeks ago
jobs	Bugfix/stable 3 4 0/9762 handle deadlock (#4200)	2 months ago
js	pkp/pkp-lib#9527 Update Vite dependencies to address css ...	4 months ago
lib	Submodule update	yesterday
locale	Merge remote-tracking branch 'translations/stable-3_4_0' int...	yesterday
pages	Show locale in url in multilingual contexts	2 weeks ago
plugins	Merge remote-tracking branch 'translations/stable-3_4_0' int...	yesterday
public	Re-add accidentally deleted public index file	3 months ago
registry	pkp/pkp-lib#9860 Public masthead page	last week
schemas	Make submission language selection and metadata forms ind...	2 months ago
styles	Copyright dates	3 years ago

About

Open Journal Systems is open source software to manage scholarly journals.

pkp.sfu.ca/software/ojs

- Readme
- Security policy
- Activity
- Custom properties
- 785 stars
- 112 watching
- 899 forks
- Report repository

Releases

117 tags

Packages

No packages published

Contributors 243



+ 229 contributors

Languages



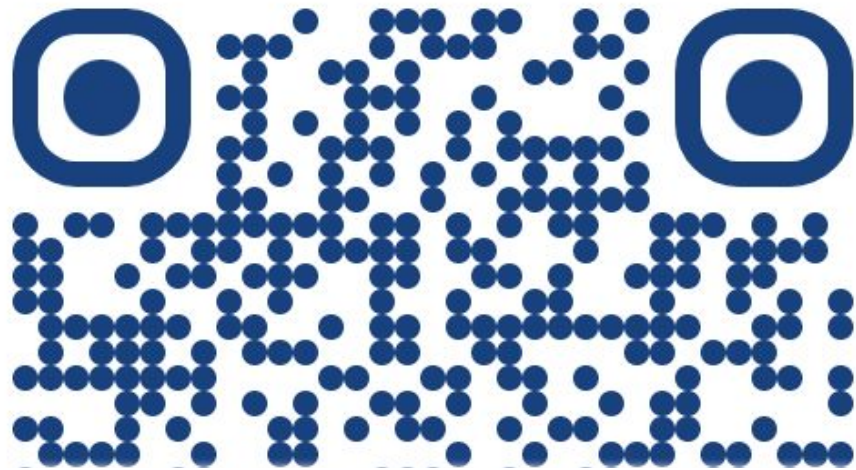


What is it?

- Group real-time text-based communication, texting-style
- Slack 'instances' are called Workgroups, and collect multiple channels (discussion topics) around a shared theme.

What is it good for?

- Quick discussions and pointers towards specific resources
- Getting an idea of who is involved in particular aspects of a project.



<https://slack-invitation.folio.org/>



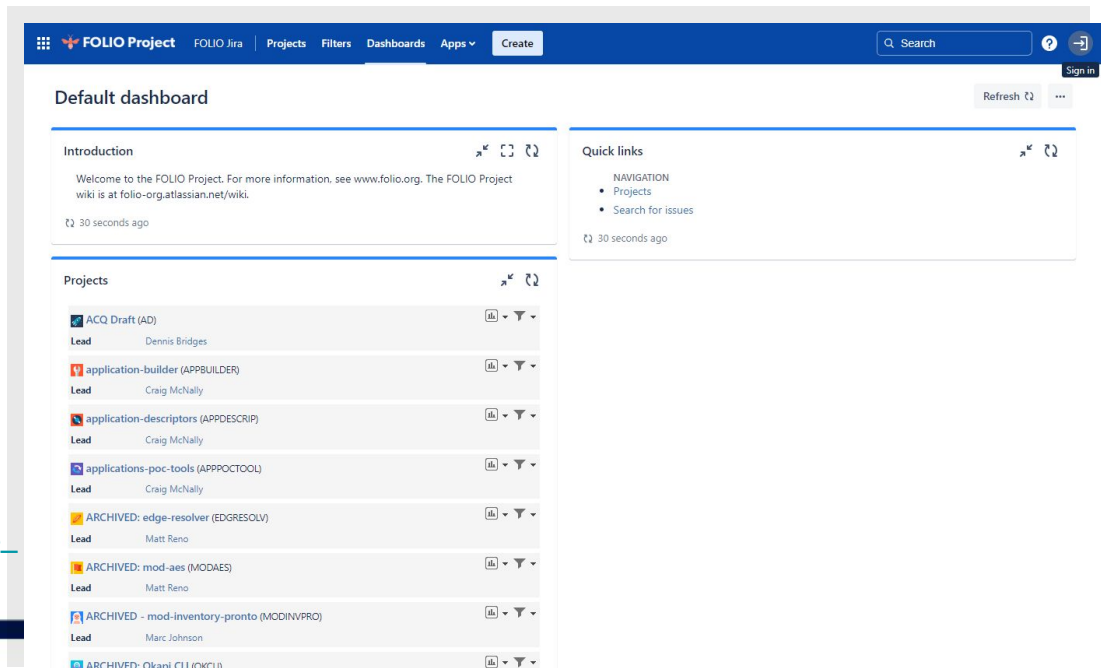
Confluence

- Confluence = Atlassian's wiki software.
- Used for posting public information / documentation.



Where to sign up
for FOLIO LSP's
Confluence

https://folio-org.atlassian.net/wiki/login.action?os_destination=/spaces/COMMUNITY/overview



The screenshot shows the 'Default dashboard' for the 'FOLIO Project' in Confluence. The top navigation bar includes 'FOLIO Project', 'FOLIO Jira', 'Projects', 'Filters', 'Dashboards', 'Apps', and a 'Create' button. A search bar and a 'Sign in' button are also present. The main content area is divided into several sections:

- Introduction:** A welcome message stating 'Welcome to the FOLIO Project. For more information, see www.folio.org. The FOLIO Project wiki is at folio-org.atlassian.net/wiki.' It also shows a refresh indicator '30 seconds ago'.
- Quick links:** A section with a 'NAVIGATION' header containing links for 'Projects' and 'Search for issues'. It also shows a refresh indicator '30 seconds ago'.
- Projects:** A list of project entries, each with a lead name and a refresh indicator '30 seconds ago'. The projects listed are:
 - ACQ Draft (AD) - Lead: Dennis Bridges
 - application-builder (APPBUILDER) - Lead: Craig McNally
 - application-descriptors (APDESCRIP) - Lead: Craig McNally
 - applications-poc-tools (APPROCTOOL) - Lead: Craig McNally
 - ARCHIVED: edge-resolver (EDGRESOLV) - Lead: Matt Reno
 - ARCHIVED: mod-aes (MODAES) - Lead: Matt Reno
 - ARCHIVED - mod-inventory-pronto (MODINVPRO) - Lead: Marc Johnson
 - ARCHIVED: Okapi CLI (OKCLI) - Lead: (not specified)

Welcome to the FOLIO Wiki

This site holds documentation about the FOLIO project in general and the work of the Special Interest Groups.

For more information on the Open Library Environment and the Open Library Foundation and their relationship to FOLIO, see [FOLIO Organizational Relationships](#).

FOLIO Communication Spaces

There are several avenues for keeping up with FOLIO development. Join the community at <https://www.folio.org/> and sign up for the "Community Updates" for a monthly newsletter with updates and events announcements. You can browse this wiki without signing up, but to participate via the wiki you must first sign up for [issues.folio.org](#); then use the same login information here. Details for these and other options may be found on the [FOLIO Communication Spaces](#) page.

FOLIO Community Council

The [FOLIO Community Council](#), initially formed in March 2021, has the following charter:

To foster a healthy, productive community ecosystem, policy, and collaboration for the FOLIO project.

It plays 2 key roles. Firstly to ensure the community is strong and healthy, which can include recruiting, marketing and many external facing activities. Secondly, this council is responsible for the smooth operation of community activities, including coordinating with other councils, and ensuring the community is collaborative and inclusive. It is the highest level organizational body within FOLIO project.

The Community Council is the first point of contact for [FOLIO Member Organizations](#).

FOLIO Product Council

The [FOLIO Product Council](#), also called the SIG of SIGs, will act on behalf of the FOLIO Community to express and champion priorities in the development of the FOLIO Library Service Platform. Any questions, suggestions, concerns or ideas about the development of the FOLIO LSP can be raised through the Product Council (aka FC).

FOLIO Technical Council

The [FOLIO Technical Council](#) provides technical guidance to the FOLIO project. The TC guides the project's architectural vision, technical policies, standards, and best practices.

FOLIO's Vision, Strategic Objectives and Initiatives

The initial document, finalized in December 2020

These are intended to serve several purposes:

1. Help set context and a direction for the project so that more detailed tactical planning can be done in alignment with strategic goals
2. Provide a structure for the project's community to periodically reassess its strategic goals and intentions
3. Allow the community to have a single, shared understanding of where we want FOLIO to go in the future

These will be reviewed and updated regularly by the community.

FOLIO's Governance Model

The [FOLIO Governance Model](#) was developed over the course of 18 months (July 2019 through December 2020) and was rolled out in 2021. The model allows organizations to be recognized as members whether they commit to paying dues or donating the time of people to do the work needed to create and sustain FOLIO. It allows all participants in the community to select council members. Please see the [wiki page](#) for more details.

Metadata Management

Metadata Management SIG Product Owners

Name	Responsibility	Affiliation	Title
@Ryan Taylor	<ul style="list-style-type: none"> • mod-inventory • ui-inventory • ui-plugin-create-inventory-records • mod-data-import • ui-data-import • mod-data-import-converter-storage • mod-di-converter-storage • data-import-processing-core 	EBSCO	Product Owner for Data Import
@Khaliah Gambrell @Christine Schultz-Richert	<ul style="list-style-type: none"> • mod-inventory-storage • mod-search • mod-quick-marc • ui-quick-marc • ui-marc-authorities • ui-plugin-find-instance 	EBSCO	Lead Product Owner - FOLIO and PO for eHoldings, Accessibility, Stripes-Force, quickMARC
@Christine Schultz-Richert	Search and filter pane and search results pane	EBSCO	
@Charlotte White	<ul style="list-style-type: none"> • mod-inventory-update 	Index Data	Lead Product Owner for SE, Ther, Odin and Gutenberg development team
@Magda Zacharska	<ul style="list-style-type: none"> • mod-data-export • ui-data-export • mod-oi-gmh • mod-bulk-operations • ui-bulk-edit 	EBSCO	Product Owner for Metadata export, OAI-PMH and Bulk edit

Community / FOLIO Governance Model

FOLIO Governance Model

Owned by [Mike Gorrell](#) •••
 Last updated: Oct 30, 2023 by [Simeon Warner](#) • Version comment • 13 min read • Legacy editor

- [Introduction](#)
- [FOLIO Guiding Principles](#)
- [Governance](#)
 - [Overview](#)
 - [Definitions](#)
 - [Council Operations](#)
 - [Council Charters and Descriptions](#)
 - [Community Council](#)
 - [Charter](#)
 - [Description](#)
 - [Membership](#)

Important Documents/Links

- [Welcome!](#) New community members start here.
- [Information and User Guides for FOLIO Apps](#)
- [FOLIO News & Events](#)
- [Looking for a way to join the project? We're looking for Product Owners!](#)
- [Do you have a SQL or Java developer with limited time to give? We need help with Reporting!](#)
- [Directories: Developers – Product Owners – User Experience Leads](#)
- [FOLIO Feature Prioritization](#)
- [FOLIO Release Management Stakeholders](#)
- [FOLIO Implementers Group](#)
- [Community Resources](#)
- [FOLIO Graphics and Branding Resources](#)
- [Glossary of Terms](#)

FOLIO Forum webinars

- [Most recent Forums: FOLIO Reporting in Practice](#)
- [Past FOLIO Forums \(recordings\)](#)

Demo Sites

Log in: [diku_admin](#) / admin

- [Snapshots are the place to see the newest development](#)

Special Interest Groups

A Special Interest Group (SIG) consists of practitioners from libraries and services providers that are interested in contributing to a specific functional area of the FOLIO platform.

SIGs are open to anyone. Look for these places to participate:

- The SIG's Slack channel. More information on joining Slack, see the [FOLIO Communications Spaces](#) document.
- Most SIGs hold a periodic meeting on Zoom. Look for the "Meetings" heading in the SIG's home page right sidebar.
- Contact the SIG's convener(s). Look for the "SIG Convener" heading in the SIG's home page right sidebar.

SIGs are listed in the "SIG" category below. Other categories are "Regional SIG" and other groups.

A category is used to group together a list of spaces. You can display a category's spaces by selecting a category from below.

View Spaces with Category:

- [Accessibility](#)
- [Collaborating with the ARL Joint Task Force on Services to Patrons with Print Disabilities: the Accessibility SIG works](#)
- [Acquisitions SIG](#)
- [App Interaction SIG](#)
- [Consortia SIG](#)
- [Data Management SIG works on use cases and review feature implementations for](#)



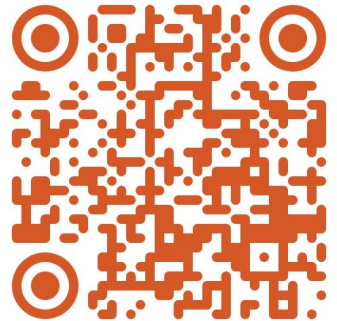
Jira Software

What is it?

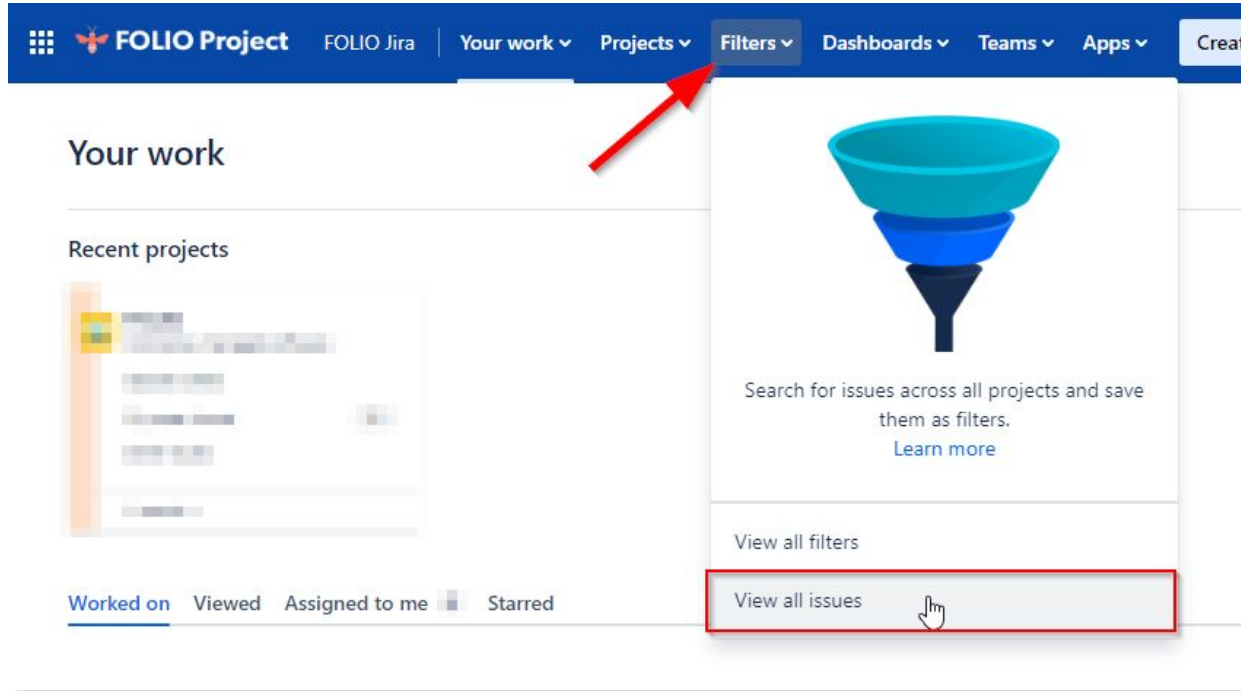
- Bug-tracking, issue tracking, project management software
- Your help-ticket version of interacting with many large open source projects

Getting Started

- issues.folio.org; login as per Confluence



Jira - Searching for Information



The screenshot shows the Jira interface for the 'FOLIO Project'. The top navigation bar includes 'FOLIO Project', 'FOLIO Jira', 'Your work', 'Projects', 'Filters', 'Dashboards', 'Teams', 'Apps', and 'Create'. A red arrow points to the 'Filters' dropdown menu, which is open. The dropdown menu features a blue funnel icon and the text: 'Search for issues across all projects and save them as filters. Learn more'. Below this, there are two buttons: 'View all filters' and 'View all issues'. The 'View all issues' button is highlighted with a red box and a mouse cursor. On the left side of the page, under 'Your work', there is a 'Recent projects' section with a blurred card. At the bottom left, there are tabs for 'Worked on', 'Viewed', 'Assigned to me', and 'Starred'.

Projects - groups of related concerns about specific aspect of the software

Filters - ways of looking at reported issues, or making new ones

Filters

New search

DEFAULT FILTERS

My open issues

Reported by me

All issues

Open issues

Done issues

Viewed recently

Created recently

Resolved recently

Updated recently

View all filters

Issues

Apps

Share

Export issues

LIST VIEW

DETAIL VIEW

...

Search issues

Project

Type

Status

Assignee

Created: Within the last 30 days

More +

BASIC

JQL

Reset

Save filter

Created

Sort

Refresh

Review of C&T 804 test case

10/11/2024

PU

Update i-0-4 automated test
to check if changes 804-2707

10/11/2024

aircraft management release. For
Version: 1.0.0 (Clemens (PI 2024))
Bug fix

10/09/2024

Removing main value in footer
production on unexpanded sort order

10/09/2024

Selecting not visible option from
ACCA - 804 status dropdown
leads to "View M&C" page mode

10/09/2024

PP

1 of 1000+

1 Like Share ...

...

Review of C&T 804 test case

...

...

...

...

...

...

...

...

...

How to Write It Up

documenting problems
like a pro

Overview: I pressed the “lemonade” button, but I got lemons which proceeded to burn my house down.

Steps to Reproduce:

1. First, I did this on {page} clicking this
2. Then I... include pictures if necessary.

Expected Results: I *thought* I would get a cool, refreshing drink.

Actual Results: Combustible lemons came out, then lit themselves on fire.

Additional Information: I am very sad about this. It impacts me because [I live in my house]...

URL: Here’s where you can see the vending machine that dispensed flaming lemons.

Interested parties: Attn: @firemarshal
@caveJohnson @evilVendingMachineCo

ECS | "Shared" facet shouldn't count Instances with "Classification" which shouldn't be discoverable (because of settings).



Description

Overview: "Shared" facet shouldn't count Instances with "Classification" which shouldn't be discoverable (because of settings).

Preconditions:

"Library of Congress classification" browse option should have selected only following "Classification identifier types" options in "Settings" >> "Inventory" >> "Classification browse":

- LC

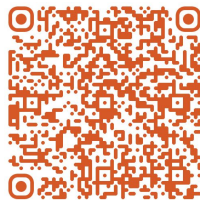
Steps to reproduce:

1. Log in into ECS Sprint testing environment as admin
2. Go to "Inventory" app on **Member** tenant
3. Run browse using "Library of Congress classification" option which will return any classification numbers:
 - Select "Library of Congress classification" browse option
 - Fill in the search box with any query: "test"
 - Click on the "Search" button.
4. Expand "Shared" accordion on the "Search & filter" pane and note values in counters next to

Issue Example

Notify People

FOLIO Module/JIRA
project-Team-PO-Dev Lead
responsibility matrix



If you only do one thing...

- Sign up for Slack. You can ask tech support questions here.
- Recommended Video Playlist for a FOLIO LSP Community Overview
 - Fundamentals of the FOLIO Community:
<https://www.youtube.com/watch?v=imOEbCbE5EU> (30 minutes)
 - FOLIO—Introduction to Special Interest Groups:
<https://www.youtube.com/watch?v=72RhdlEWH4w> (12 minutes)
 - FOLIO Communication Tools: <https://www.youtube.com/watch?v=7vfA3qCMFGw> (12 minutes)
 - FOLIO Development Lifecycle: <https://www.youtube.com/watch?v=9R8kohmP9D8> (10 minutes)
 - FOLIO Wiki and Issue Tracker Overview:
<https://www.youtube.com/watch?v=evQrip0T3Ek> (45 minutes)

Thank you for having us.

Questions?



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