

ServasOnline Developers Meeting
May 21 – 23, 2010
Spinea, Italy

Attendees (alphabetical by first name):

Arne Rempke, Germany, WHALE volunteer, young developer
Claudio Pacchiega, Italy, past ICT member, designer of Dolphin & other on-line systems
Gary Sealey, Canada, SI President, facilitator
Jean Yves Hegron, France, BeVolunteer designer and programmer
John Gunther, USA, designer and programmer
Marco Burlando, Italy, Dolphin programmer
Mario Burlando, meeting host and Dolphin analyst and implementer
Penny Pattison, Use Case Convenor, documenter
Thomas Goorden, Belgium, BeVolunteer chair, active with Use Cases
Thomas Thomas, Germany, active with WHALE, 2009 GA ServasOnline working group
Uwe Federer, Italy, ICT member, technical programmer for Servas.org
Frank Van Den Block, Belgium, BeVolunteer past chair (May 22 only)
Mirek Wasilewski, Poland, SI Treasurer (May 22 and 23 only)

May 21, 2010

Gary opened the meeting by asking about expectations of the meeting and background of the participants.

- It was agreed that the technical platform for ServasOnline must be defined first.
- It was agreed that a pilot should be done, with extensive involvement of Servas users from a wide variety of national groups and computer experience.
- It was agreed that flexibility in the system is important, but too much flexibility make the system much more complicated to develop and maintain.
- The BeVolunteer participants expressed interest in working with Servas “to develop the **best** online hospitality exchange network “– where **best** means “reliable, safe, informed, purposeful, peaceful”, and does not seek the highest number of members.

The Use Cases were discussed, as the basis for the discussion of the technical platform. Various comments were made:

- The focus of the pilot must be on the individual host/traveler (not Servas administration)
- All aspects of Servas must be considered, including administration, when doing the design
- The pilot cannot do everything, and so must focus on a few functions
- The Use Cases contain a variety of perspectives, and also demonstrate a varied level of experience with Servas, which is useful, and also needs to be matched to existing Servas rules

- The Use Case team must identify priorities for the developers, and also expand the Use Cases for the pilot (and later the rest of the system) and organize them for use by the developers and later testers and trainers
- It is important to identify the different types of users of the system
- The Use Case process went well, especially since most of the participants were new to the process
- Some Use Cases go beyond the actual system to how a person interacts with the system or uses it to enhance their experience with Servas. These are useful considerations, but not needed for the programmers.

May 22, 2010

Note: Before this meeting, a teleconference was held to explain the Dolphin technology to all participants. Dolphin is designed to manage Servas information by country and allows for different functions based on the preference of each country.

The technology of BeWelcome was then discussed (BeVolunteer is the group of Volunteers who run the BeWelcome.org hospitality exchange website). The BeWelcome technology and programs are available to be used by anyone in the world without charge (Open Source). This open source approach also provides transparency.

There followed a discussion of the compatibilities and incompatibilities of the two technologies and development environments. Various diagrams of the options were drawn and discussed.

Conclusions:

1. It is not possible to build the BeWelcome programs into Dolphin, due to the basic differences in design.
2. Dolphin must continue to be run and maintained, since it is used by all Servas national groups for the Key List, and many national groups to manage their host lists.
3. Dolphin should be retained, specifically, the key list and host list printing functions are necessary.
4. For travelers and hosts who want to join and meet (person-to-person interaction), the BeWelcome programs fit quite closely to the Use Case requirements.
5. A bridge between the two systems can be created and maintained.
6. The ServasOnline pilot should concentrate on the person-to-person Servas functions (initial query, interview, sign up, personal information, arrange a visit). This was the intention of the 2009 GA decision.
7. BeVolunteer has programmers who can help with the pilot project. Servas has volunteer testers and trainers. Other participants from both organizations can be found.

Split into 3 Groups to work on different aspects:

- A. Technical design
- B. Dolphin next steps

C. Screen design for pilot

Reconvened to discuss results.

A. Technical design

- Technically, the Servas and BeWelcome requirements are compatible
- ServasOnline using the BeWelcome program base (called ROX) will significantly speed the process
- The BeVolunteer free ROX programs mean that there is no danger that Servas might ever be denied use of the programs
- Some of the Servas improvements to ROX will be of benefit to BeWelcome as well – creating Servas ROX programs
- Developers from both organizations will be able to work together using the same BeWelcome technical environment, as it uses common programming tools and methods;
- The logical approach is to run ServasOnline and BeWelcome on the same computer (server) for efficiencies of support and computer system management
- The following are the principles that the developers defined to move forward:

Principles of Servas/BeWelcome Action Plan

1. Servas possesses the primary server
2. BW data resides on the primary server
3. We have a contract that defines joint server and computer program administration
4. BW has custody of a current backup of the data on the primary server
5. Servas will pay the current annual server fees (less that 100 Euros per month)
6. We have a contract that defines mutual responsibility & goals of autonomous auditors of each org

B. Dolphin Next Steps:

- Money management is very important, and many countries have been waiting for it for years.
- There are identified bugs in Dolphin, and also necessary enhancements that have been requested and need to be done.
- It is important to define how data would move back and forth between Dolphin and ServasOnline, and also which system would hold which primary data.

C. Screen design for pilot

- Began with www.servas.org main screen, allowing for query and option to sign in.
- Then used BeWelcome screens as the basis but modified them to fit Servas practices, including the interview.
- A few new screens are needed, and quite a few changes of details and the order of the steps, but the fit is good.
- Began the work of actually making the changes to the screens so that they can be demonstrated and also given to the programmers.

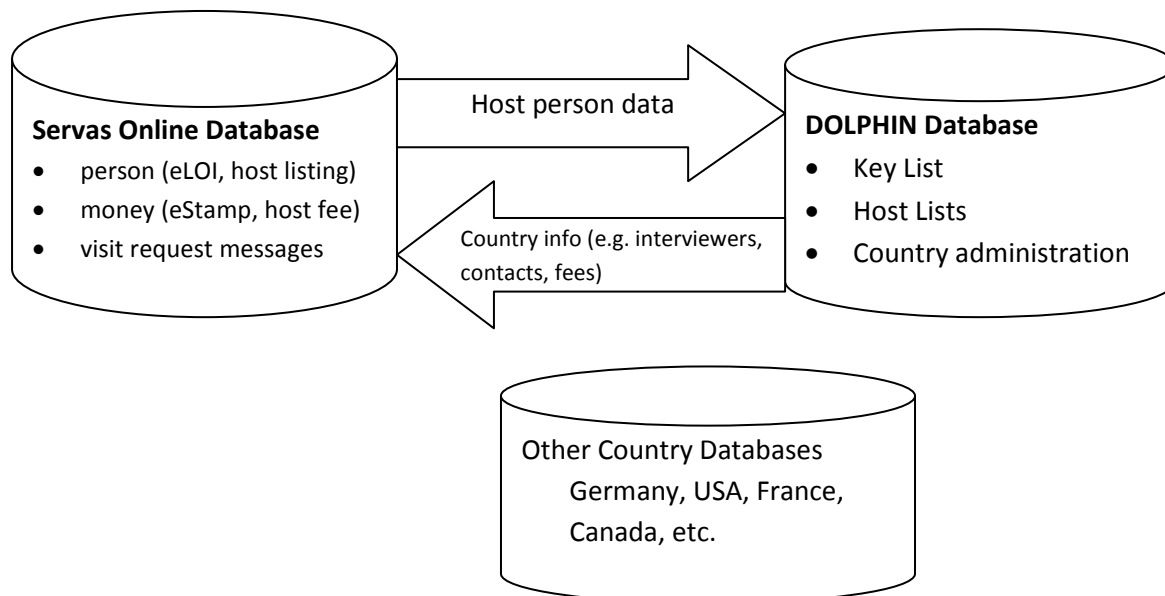
May 23, 2010

Claudio demonstrated Second Life, a social experiment where people can meet and interact online. This is a possible way for the developers and other Servas Online volunteers to work together effectively.

BeVolunteer offered some more information about their organization:

- Statutes: www.bevolunteer.org/wiki/statutes
- They have annual BeVolunteer General Assemblies, and the next one is June 5-6, 2010. Many people attend electronically and not in person. Each BeVolunteer member has one vote.
- They are diffent levels of joining:
 - BeWelcome member: (host or traveler, or just member to have contact with other like-minded people)
 - BeWelcome volunteers: people who are just volunteering online, accepted under the responsibility of a team coordinator (typically translators)
 - Approved BeVolunteers members: Volunteers whose identity and commitment has been checked by the BeVolunteer official organization
 - BeVolunteer Board of directors : people yearly elected by the BeVolunteer members
- They will be reporting the results of this meeting at their General Assembly.

The group worked together to define the overall technical picture:



- * Countries decide when they join Servas Online
- * Servas Online data not visible to BeWelcome members and vice versa, unless the individual requests it
- * ServasOnline individual controls what pieces of information about them is visible online
- * Contact with others on ServasOnline is done through the system, not sharing real email addresses
- * Data may be added electronically from an individual country database, as decided by the country
- * The 'person data' master copy will be stored in ServasOnline
- * The 'money data related to persons' will be stored in ServasOnline
- * Printed host lists will be produced by Dolphin, using the data from ServasOnline

* The transition state is expected to last for years

Split into 3 Groups to work on different aspects:

- A. Define Servas/BeVolunteer working relationship
- B. Define technical relationship and next steps
- C. Continue screen design for pilot

Reconvened to discuss results.

A. Define Servas/BeVolunteer working relationship

See separate document "Facilitation Servas ON Line.doc"

B. Define technical relationship and next steps

- Loaded BeWelcome software on Arne's computer
- Discussed many aspects – the following is a list of the decisions:
 1. Officially designate the project as "ServasOnline" and use only that term from now on.
 - a. "SOL" is not a useful search term. "ServasOnline" is unused on the web
 - b. The standalone term "SOL" does not convey any meaning
 - c. "SOL" has a humorous and vulgar meaning in North America
 - d. "ServasOnline" is only one syllable more than "SOL"
 2. CREATE TODO DOC
 3. USE TICKET SYSTEM FOR SPECIFIC TASKS
 4. Servas data - analyze Dolphin, ROX, use cases and modify ROX schema
 - a. Certain interview-verified items must be locked from user change (changed only by or with approval of Servas admin)
 - i. Photo used at interview
 - ii. Name verified at interview
 - iii. Passport number (never displayed)
 - iv. Host primary location address (?)
 5. Coding process - site is never promoted in its entirety
 - a. Coder works local
 - b. Copy changes to test environment
 - c. Copy changes to alpha environment
 - d. Copy changes to production
 6. Major structural changes - compare with Dolphin schema
 - a. Servas-specific flags/fields (split to be analyzed)
 - i. Is Servas
 - ii. Pmt status
 - iii. Host/trav/member
 - iv. LOI/expire date
 - v. Assigned nation
 - b. New features
 - i. Money system
 - ii. Estamp
 - iii. ELOI

- iv. Adapt current documentation
- c. Data transfer
 - i. Dolphin->ServasOnline
 - ii. ServasOnline->Dolphin
- 7. Security
 - a. HTTPS on all appropriate pages
 - b. HTTP on all others

C. Continue screen design for pilot

- Completed hand-drawn mock-ups of screens for new person query, prepare for interview, interview, profile and arrange visit.
- Noted that the user interface 'look and feel' is important, as inevitably new people will be comparing Servas and BeWelcome. They must be different enough to be clear which is being used.

Wrap-up Discussion

DECISIONS:

1. The following attendees recommend the plan in principle, subject to final revision, as described in "Facilitation Servas ON Line.doc":
Arne Rempke, Claudio Pacchiega, Gary Sealey, Jean Yves Hegron, John Gunther, Mirek Wasilewski, Penny Pattison, Thomas Goorden, Thomas Thomas, Uwe Federer
2. The fees for Letters of Introduction and host lists will be stored by country in Dolphin but the money management processing and electronic stamps will be done in ServasOnline.
3. The following is the proposed timeline for the pilot:

June 2010	Use Cases details User Interface design Analysis and Design of ServasOnline system Technical Design of ServasOnline system Fundraising appeal
July 2010	Programming
August 1-15, 2010	Programming Initial programmer testing
August 16-Sept 15, 2010	Project team testing
Sept 16-Oct 15, 2010	Testing by users

Oct 15-31, 2010 Evaluate pilot

Oct 31, 2010 CHECKPOINT

NEXT STEPS and ACTION ITEMS

1. Thomas Goorden and Gary will work on the Statement of Working Together (including security, privacy, safety, audit, ownership). This will be taken to Servas EXCO and the BeVolunteer General Assembly.
2. Dolphin next steps will be reviewed by Penny and Mario (including maintenance requirements and an annual renewal flag), and discussed with Jerome Le Tourneur.
3. The following ServasOnline teams were identified:
 - a. Use Case Team (the what) – convenor from Servas
 - b. User Interface Design (the look and feel) – convenor from Servas
 - c. Developers for ServasOnline and interface with Dolphin (the how) – coordinator Jean Yves
 - d. Coordination team - Project Management will be jointly done by Thomas Goorden and a person named by Servas; they will manage the plan – who, what when
4. Penny and Uwe will work on the screen designs, to have samples by June 6, 2010. These will be the starting point for the Use Case team and User Interface Design team.
5. Gary (with help from others) will find a Project Manager from Servas.
6. Gary (with help from others) will find a new convenor for the Use Case group from Servas.
7. Gary (with help from others) will find a convenor and Servas volunteers for the User Interface Design team.
8. Thomas Goorden will look in to fundraising options, and head that effort.
9. Thomas Goorden (with help from others) will look for BeVolunteer volunteers for the different groups.