How to Release Apache Fineract - Cutting a release branch (Draft)

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This document describes how to release Fineract. It is a work in progress and should be refined by the Release Manager (RM) as they come across aspects of the release process not yet documented here

Give a heads up

The RM should first create list of issues/features and then setup a timeline for release branch point. The time for the day the issue list is created to the release branch point must be at least two weeks in order to give the community a chance to prioritize and commit any last minute features and issues they would like to see in the upcoming release.

The RM should then send the pointer to the umbrella issue along with the tentative timeline for branch point to the developer lists. Any work identified as release related that needs to be completed should be added as a sub task of the umbrella issue to allow users to see the overall release progress in one place.

The RM should then inform users once branch point is created.

```
To: dev@fineract.apache.org
Subject: Work on $release release has started
Created a tracking jira (jira#) for the Fineract $release and plan to branch tentatively on $date.
What would you like to see included?
Thanks, $RM
```

Sanitize JIRA

Before a release is done, make sure that any issues that are *fixed* have their fix version setup correctly.

```
project = fineract and resolution = fixed and fixVersion is empty
```

Move the unresolved jiras to the next release

```
project = fineract and fixVersion = 0.7.0 and status not in( resolved, done, Accepted, Closed)
```

You can also run the following query to make sure that the issues fixed for the to-be-released version look accurate:

```
project = fineract and fixVersion = '0.7.0'
```

Finally, check out the output of the **JIRA release note tool** to see which JIRAs are included in the release, in order to do a sanity check.

Creating Release Artifacts

Communicate with the community

Send an email to developer mailing list(dev@fineract.apache.org) to notify that you are about to branch. Ask to hold off any commits until this is finished. Send another email after branching is done.

Create a release branch

Clone fresh repository copy

```
% git clone https://git-wip-us.apache.org/repos/asf/fineract.git
% cd fineract
```

Check that current HEAD points to commit on which you want to base new release branch. Checkout particular commit if not.

```
% git log # Check current branch history. HEAD should point to commit that you want to be base for your release branch
```

Create a new release branch with name "$Version"

```
% git checkout -b 0.7.0
```

Push new branch to Apache Fineract repository

```
% git push origin 0.7.0
```

Add new release notes in Release Folders

(The change list can be swiped from the **JIRA release note tool** (use the "text" format for the change log). See JIRA Cleanup above to ensure that the release notes generated by this tool are what you are expecting)

Send en email announcing the new release branch

```
To: dev@fineract.apache.org
Subject: New release branch 0.7.0
I've just created new release branch for upcoming 0.7.0 release.
Please continue committing to develop branch as usual.
I'll cherry-pick commits to branch 0.7.0 on per needed basis. Thanks, $RM
```

Tag release branch

```
% git checkout 0.7.0
% git tag -a release-0.7.0 -m "Fineract 0.7.0 release"
#Make sure compiles/tests run fine and rat check is fine (% cd fineract-provider, % gradlew clean integrationTest)
% git push origin release-0.7.0
```

Create source and binary artifacts. The steps are defined in Release Sign

Sanity Check

Make sure the tar and the release branch match

```
% cd /fineract-release-preparations
% tar -xvf apache-fineract-0.7.0-src.tar.gz
#Do a fresh clone of the tag
% git clone https://git-wip-us.apache.org/repos/asf/fineract.git
% cd fineract/
% git checkout tags/release-0.7.0
% cd ..
% diff -r fineract apache-fineract-0.7.0-src
```

Make sure code compiles and tests pass on the uncompressed source.

```
#Make sure prerequisites are met before running these commands
% cd apache-fineract-0.7.0-src/fineract-provider
% gradlew clean integrationTest (For running integration tests)
% gradlew clean build (For building deploy able war)
% gradlew rat (For RAT checks)
```

Create signatures and check sums

All release artifacts must be signed. In order to sign a release you will need a PGP key. You should get your key signed by a few other people. You will also need to receive their keys from a public key server.   See the Apache release signing page for more details. Please follow the steps defined in Release Sign

Verifying a release candidate

Following are the typical things we need to verify before voting on a release candidate. And the release manager should verify them too before calling out a vote.

- Make sure release artifacts are hosted @https://dist.apache.org/repos/dist/dev/fineract/
- Release candidates should be in format apache-$project-$version.tar.gz
- Verify signatures and hashes. You may have to import the public key of the release manager to verify the signatures. (gpg --recv-key <key id>)
- git tag matches the released bits (diff -rf)
- Can compile successfully from source
- Verify DISCLAIMER, NOTICE and LICENSE (year etc)
- All files have correct headers (Rat check should be clean - gradlew rat)
- No jar files in the source artifacts
- Integration tests should work.

Running the vote

Voting has to be done on dev@fineract.apache.org and . You can close the vote after voting period expires and you accumulate sufficient votes.

Call for voting on dev list (PMC)

```
To: dev@fineract.apache.org
Subject: [VOTE] [APACHE FINERACT] 0.7.0 for release
We have created Apache Fineract 0.7.0 release, with the artifacts below up for a vote.
It fixes the following issues: {list of issues fixed}
Source & Binary files : https://dist.apache.org/repos/dist/dev/fineract/0.7.0/
Tag to be voted on (rc#): https://git-wip-us.apache.org/repos/asf?p=fineract.git;a=commit;h=refs/heads/0.7.0
Fineract's KEYS containing the PGP key we used to sign the release:
https://dist.apache.org/repos/dist/dev/fineract//KEYS
Note that this release contains source and binary artifacts
Vote will be open for 72 hours.
[ ] +1 approve
[ ] +0 no opinion
[ ] -1 disapprove (and reason why)
Thanks, $RM
```

Upon receiving 3 +1s from the PMC, reply to the voting thread and prefixing **[RESULT]** to the subject line with the results.

```
To: dev@fineract.apache.org
Subject: [RESULT][VOTE] [APACHE FINERACT] 0.7.0 for release
Voting is now closed and has passed with the following tally,
Binding +1s: Myrle Krantz, Avik Ganguly, Ed Cable
```

```
Non binding +1s: Friendly new contributor, Friendly well-wisher, Friendly dude off the street
Thanks to everyone who voted! I'll continue with the rest of the release process.
$RM
```

Rolling out the Release

Close JIRA version

You need to close the release in JIRA so that everyone knows that your version should not be used as "fixVersion" for new bugs. Go to JIRA "Administer project" page and follow "Versions" in left menu. Table with list of all releases should appear, click on additional menu on the right of your release and choose "Release" option. Submit release date and you're done.

Upload the artifacts

In order to release you have to checkout release repository located on https://dist.apache.org/repos/dist/release/fineract and add release artifacts there.

```
svn co https://dist.apache.org/repos/dist/release/fineract fineract-release
cd fineract-release
mkdir 0.7.0/
cp $source_to_your_artifacts 0.7.0/ svn add 0.7.0/
```

Announce the release

Send an email to announce@apache.org (the from: address must be @apache.org). For example,

```
To: announce@apache.org
CC: dev@fineract.apache.org,user@fineract.apache.org
Subject: [ANNOUNCE] Apache Fineract 0.7.0 Release
Hi all,
The Apache Fineract team would like to announce the release of Apache Fineract 0.7.0 with source and binary artifacts.
Apache Fineract is an open source system for core banking as a platform. Fineract provides a reliable, robust, and affordable solution for entrepreneurs,
financial institutions, and service providers to offer financial services to the world's 2 billion under banked and unbanked.
More details regarding Apache Fineract can be found at http://fineract.apache.org/
The release artifacts can be downloaded here: https://dist.apache.org/repos/dist/release/fineract/0.7.0/
The release notes can be found here: https://cwiki.apache.org/confluence/display/FINERACT/0.7.0+Release-+Apache+Fineract

Thanks!
The Apache Fineract Team
```

Update the website

Finally update the website with latest release details downloads. Code is available at Website Code. Apache Fineract website reflects the code present in asf-site branch of https://git-wip-us.apache.org/repos/asf/fineract-site.git. Any change committed on master branch of https://git-wip-us.apache.org/repos/asf/fineract-site.git should be merged with asf-site branch to reflect the change on Fineract website.

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