

---

# **Patchwork**

*Release 2.1.0.rc.2*

**Jun 18, 2018**



|          |   |           |
|----------|---|-----------|
| <b>1</b> | <b>Overview</b>   | <b>3</b>  |
| 1.1      | Projects . . . . .  | 4         |
| 1.2      | People . . . . .  | 4         |
| 1.3      | Users . . . . .   | 4         |
| 1.4      | Submissions . . . . .   | 5         |
| 1.5      | Comments . . . . .  | 5         |
| 1.6      | Patch Metadata . . . . .  | 5         |
| 1.7      | Collections . . . . .   | 6         |
| 1.8      | Events . . . . .  | 7         |
| <b>2</b> | <b>Design</b>   | <b>9</b>  |
| 2.1      | Patchwork should supplement mailing lists, not replace them . . . . .         | 9         |
| 2.2      | Don't pollute the project's changelogs with Patchwork poop . . . . .          | 9         |
| 2.3      | Patchwork users shouldn't require a specific version control system . . . . . | 9         |
| <b>3</b> | <b>Autodelegation</b>   | <b>11</b> |
| <b>4</b> | <b>Hint Headers</b>   | <b>13</b> |
| <b>5</b> | <b>Clients</b>  | <b>15</b> |
| 5.1      | pwclient . . . . .  | 15        |
| 5.2      | git-pw . . . . .  | 15        |
| <b>6</b> | <b>Installation</b>   | <b>17</b> |
| 6.1      | Deployment Guides, Provisioning Tools and Platform-as-a-Service . . . . .     | 17        |
| 6.2      | Requirements . . . . .  | 17        |
| 6.3      | Database . . . . .  | 18        |
| 6.4      | Patchwork . . . . .   | 19        |
| 6.5      | Reverse Proxy and WSGI HTTP Servers . . . . .                                 | 21        |
| 6.6      | Django administrative console . . . . .                                       | 23        |
| 6.7      | Incoming Email . . . . .  | 24        |
| 6.8      | (Optional) Configure your VCS to Automatically Update Patches . . . . .       | 25        |
| 6.9      | (Optional) Configure the Patchwork Cron Job . . . . .                         | 26        |
| <b>7</b> | <b>Configuration</b>  | <b>27</b> |
| 7.1      | The settings.py File . . . . .  | 27        |
| 7.2      | Patchwork-specific Settings . . . . .   | 27        |

|           |  |           |
|-----------|--|-----------|
| <b>8</b>  | <b>Management</b>                                    | <b>29</b> |
| 8.1       | The <code>manage.py</code> Script . . . . .          | 29        |
| 8.2       | Available Commands . . . . .                         | 29        |
| <b>9</b>  | <b>Upgrading</b>                                     | <b>31</b> |
| 9.1       | Before You Start . . . . .                           | 31        |
| 9.2       | Identify Changed Scripts, Requirements, etc. . . . . | 31        |
| 9.3       | Understand What Requirements Have Changed . . . . .  | 31        |
| 9.4       | Collect Static Files . . . . .                       | 32        |
| 9.5       | Upgrade Your Database . . . . .                      | 32        |
| <b>10</b> | <b>Contributing</b>                                  | <b>33</b> |
| 10.1      | Coding Standards . . . . .                           | 33        |
| 10.2      | Testing . . . . .                                    | 33        |
| 10.3      | Release Notes . . . . .                              | 34        |
| 10.4      | API . . . . .  | 34        |
| 10.5      | Reporting Issues . . . . .                           | 34        |
| 10.6      | Submitting Changes . . . . .                         | 34        |
| 10.7      | Mailing Lists . . . . .                              | 35        |
| <b>11</b> | <b>Installation</b>                                  | <b>37</b> |
| 11.1      | Docker-Based Installation . . . . .                  | 37        |
| 11.2      | Manual Installation . . . . .                        | 39        |
| 11.3      | Import Mailing List Archives . . . . .               | 42        |
| 11.4      | Django Debug Toolbar . . . . .                       | 42        |
| 11.5      | Environment Variables . . . . .                      | 43        |
| <b>12</b> | <b>Release Process</b>                               | <b>45</b> |
| 12.1      | Versioning . . . . .                                 | 45        |
| 12.2      | Release Cycle . . . . .                              | 46        |
| 12.3      | Supported Versions . . . . .                         | 46        |
| 12.4      | Release Checklist . . . . .                          | 46        |
| 12.5      | Backporting . . . . .                                | 46        |
| <b>13</b> | <b>Using the APIs</b>                                | <b>47</b> |
| <b>14</b> | <b>Static Assets</b>                                 | <b>49</b> |
| 14.1      | css . . . . .  | 49        |
| 14.2      | fonts . . . . .                                      | 49        |
| 14.3      | js . . . . .   | 50        |
| <b>15</b> | <b>The REST API</b>                                  | <b>53</b> |
| 15.1      | Getting Started . . . . .                            | 53        |
| 15.2      | Versioning . . . . .                                 | 54        |
| 15.3      | Schema . . . . .                                     | 55        |
| 15.4      | Parameters . . . . .                                 | 55        |
| 15.5      | Authentication . . . . .                             | 55        |
| 15.6      | Pagination . . . . .                                 | 56        |
| 15.7      | Supported Versions . . . . .                         | 56        |
| <b>16</b> | <b>The XML-RPC API</b>                               | <b>57</b> |
| 16.1      | Getting Started . . . . .                            | 57        |
| 16.2      | Further Information . . . . .                        | 58        |
| <b>17</b> | <b>v2.1 Series (“Eolienne”)</b>                      | <b>59</b> |

|           |                                 |           |
|-----------|---------------------------------|-----------|
| 17.1      | v2.1.0-rc2-9                    | 59        |
| 17.2      | v2.1.0-rc1                      | 59        |
| <b>18</b> | <b>v2.0 Series (“Dazzle”)</b>   | <b>63</b> |
| 18.1      | v2.0.3                          | 63        |
| 18.2      | v2.0.2                          | 63        |
| 18.3      | v2.0.1                          | 64        |
| 18.4      | v2.0.0                          | 64        |
| <b>19</b> | <b>v1.1 Series (“Cashmere”)</b> | <b>67</b> |
| 19.1      | 1.1.3                           | 67        |
| 19.2      | 1.1.2                           | 67        |
| 19.3      | 1.1.1                           | 67        |
| 19.4      | 1.1.0                           | 68        |
| <b>20</b> | <b>v1.0 Series (“Burlap”)</b>   | <b>69</b> |
| 20.1      | 1.0.0                           | 69        |
| <b>21</b> | <b>v0.9 Series (“Alpaca”)</b>   | <b>71</b> |



Patchwork is a patch tracking system for community-based projects. It is intended to make the patch management process easier for both the project's contributors and maintainers, leaving time for the more important (and more interesting) stuff.

Patches that have been sent to a mailing list are 'caught' by the system, and appear on a web page. Any comments posted that reference the patch are appended to the patch page too. The project's maintainer can then scan through the list of patches, marking each with a certain state, such as Accepted, Rejected or Under Review. Old patches can be sent to the archive or deleted.

Currently, Patchwork is being used for a number of open-source projects, mostly subsystems of the Linux kernel. Although Patchwork has been developed with the kernel workflow in mind, the aim is to be flexible enough to suit the majority of community projects.





The key concepts or models of Patchwork are outlined below.

- *Projects*
- *People*
- *Users*
  - *Standard Users*
  - *Maintainers*
- *Submissions*
  - *Patches*
  - *Cover Letters*
- *Comments*
- *Patch Metadata*
  - *States*
  - *Delegates*
  - *Tags*
  - *Checks*
- *Collections*
  - *Series*
  - *Bundles*
  - *To-do Lists*
- *Events*

- *Cover Letter Created*
- *Patch Created*
- *Patch Completed*
- *Patch Delegated*
- *Patch State Changed*
- *Check Created*
- *Series Created*
- *Series Completed*
- *What's Not Exposed*

## 1.1 Projects

Projects typically represent a software project or sub-project. A Patchwork server can host multiple projects. Each project can have multiple maintainers. Projects usually have a 1:1 mapping with a mailing list, though it's also possible to have multiple projects in the same list using the subject as filter. Patches, cover letters, and series are all associated with a single project.

## 1.2 People

People are anyone who has submitted a patch, cover letter, or comment to a Patchwork instance.

## 1.3 Users

Users are anyone who has created an account on a given Patchwork instance.

### 1.3.1 Standard Users

A standard user can associate multiple email addresses with their user account, create bundles and store TODO lists.

### 1.3.2 Maintainers

Maintainers are a special type of user that with permissions to do certain operations that regular Patchwork users can't. Patchwork maintainers usually have a 1:1 mapping with a project's code maintainers though this is not necessary.

The operations that a maintainer can invoke include:

- Change the state of a patch
- Archive a patch
- Delegate a patch, or be delegated a patch

## 1.4 Submissions

Patchwork captures three types of mail to mailing lists: patches, cover letters, and replies to either patches or cover letters, a.k.a. comments. Any mail that does not fit one of these categories is ignored.

### 1.4.1 Patches

Patches are the central object in Patchwork structure. A patch contains both a diff and some metadata, such as the name, the description, the author, the version of the patch etc. Patchwork stores not only the patch itself but also various metadata associated with the email that the patch was parsed from, such as the message headers or the date the message itself was received.

### 1.4.2 Cover Letters

Cover letters provide a way to offer a “big picture” overview of a series of patches. When using Git, these mails can be recognised by way of their *O/N* subject prefix, e.g. *[00/11] A sample series*. Like patches, Patchwork stores not only the various aspects of the cover letter itself, such as the name and body of the cover letter, but also various metadata associated with the email that the cover letter was parsed from.

## 1.5 Comments

Comments are replies to a submission - either a patch or a cover letter. Unlike a Mail User Agent (MUA) like Gmail, Patchwork does not thread comments. Instead, every comment is associated with either a patch or a cover letter, and organized by date.

## 1.6 Patch Metadata

Patchwork allows users to store various metadata against patches. This metadata is only configurable by a maintainer.

### 1.6.1 States

States track the state of patch in its lifecycle. States vary from project to project, but generally a minimum subset of “new”, “rejected” and “accepted” will exist.

### 1.6.2 Delegates

Delegates are Patchwork users who are responsible for both reviewing a patch and setting its eventual state in Patchwork. This makes them akin to reviewers in other tools. Delegation works particularly well for larger projects where various subsystems, each with their own maintainer(s), can be identified. Only one delegate can be assigned to a patch.

---

**Note:** Patchwork supports automatic delegation of patches. Refer to *Autodelegation* for more information.

---

### 1.6.3 Tags

Tags are specially formatted metadata appended to the foot the body of a patch or a comment on a patch. Patchwork extracts these tags at parse time and associates them with the patch. You add extra tags to an email by replying to the email. The following tags are available on a standard Patchwork install:

**Acked-by:** For example:

```
Acked-by: Stephen Finucane <stephen@that.guru>
```

**Tested-by:** For example:

```
Tested-by: Stephen Finucane <stephen@that.guru>
```

**Reviewed-by:** For example:

```
Reviewed-by: Stephen Finucane <stephen@that.guru>
```

The available tags, along with the significance of said tags, varies from project to project and Patchwork instance to Patchwork instance. The [kernel project documentation](#) provides an overview of the supported tags for the Linux kernel project.

### 1.6.4 Checks

Checks store the results of any tests executed (or executing) for a given patch. This is useful, for example, when using a continuous integration (CI) system to test patches. Checks have a number of fields associated with them:

**Context** A label to discern check from the checks of other testing systems

**Description** A brief, optional description of the check

**Target URL** A target URL where a user can find information related to this check, such as test logs.

**State** The state of the check. One of: `pending`, `success`, `warning`, `fail`

**User** The user creating the check

---

**Note:** Checks can only be created through the Patchwork APIs. Refer to `../api` for more information.

---

## 1.7 Collections

Patchwork provides a number of ways to store groups of patches. Some of these are automatically generated, while others are user-defined.

### 1.7.1 Series

Series are groups of patches, along with an optional cover letter. Series are mostly dumb containers, though they also contain some metadata themselves such as a version (which is inherited by the patches and cover letter) and a count of the number of patches found in the series.

## 1.7.2 Bundles

Bundles are custom, user-defined groups of patches. Bundles can be used to keep patch lists, preserving order, for future inclusion in a tree. There's no restriction of number of patches and they don't even need to be in the same project. A single patch also can be part of multiple bundles at the same time. An example of Bundle usage would be keeping track of the Patches that are ready for merge to the tree.

## 1.7.3 To-do Lists

Patchwork users can store a to-do list of patches.

## 1.8 Events

Events are raised whenever patches are created or modified.

All events have a number of common properties, along with some event-specific properties:

**category** The type of event

**project** The project this event belongs to

**date** When this event was created

**payload** Additional information

### 1.8.1 Cover Letter Created

**Category** `cover-created`

Sent when a cover letter is created.

**cover** Created cover letter

### 1.8.2 Patch Created

**Category** `patch-created`

Sent when a patch is created.

**patch** Created patch

### 1.8.3 Patch Completed

**Category** `patch-completed`

Sent when a patch in a series has its dependencies met, or when a patch that is not in a series is created (since that patch has no dependencies).

**patch** Completed patch

**series** Series from which patch dependencies were extracted, if any

## 1.8.4 Patch Delegated

**Category** `patch-delegated`

Sent when a patch's delegate is changed.

**patch** Updated patch

**previous** Previous delegate, if any

**current** Current delegate, if any

## 1.8.5 Patch State Changed

**Category** `patch-state-changed`

Sent when a patch's state is changed.

**patch** Updated patch

**previous** Previous state

**current** Current state

## 1.8.6 Check Created

**Category** `check-created`

Sent when a patch check is created.

**check** Created check

## 1.8.7 Series Created

**Category** `series-created`

Sent when a series is created.

**series** Created series

## 1.8.8 Series Completed

**Category** `series-completed`

Sent when a series is completed.

**series** Completed series

## 1.8.9 What's Not Exposed

- Bundles

We don't expose an "added to bundle" event as it's unlikely that this will be useful to either users or CI setters.

- Comments

Like Bundles, there likely isn't much value in exposing these via the API.

### **2.1 Patchwork should supplement mailing lists, not replace them**

Patchwork isn't intended to replace a community mailing list; that's why you can't comment on a patch in Patchwork. If this were the case, then there would be two forums of discussion on patches, which fragments the patch review process. Developers who don't use Patchwork would get left out of the discussion.

### **2.2 Don't pollute the project's changelogs with Patchwork poop**

A project's changelogs are valuable - we don't want to add Patchwork-specific metadata.

### **2.3 Patchwork users shouldn't require a specific version control system**

Not everyone uses git for kernel development, and not everyone uses git for Patchwork-tracked projects.

It's still possible to hook other programs into Patchwork, using the pwclient command-line client for Patchwork, or directly to the XML RPC interface.





---

## Autodelegation

---

Autodelegation allows patches to be automatically delegated to a user based on the files modified by the patch. To do this, a number of rules can be configured in the project administration page. This can usually be found at:

```
/admin/patchwork/project/<project_id>/change
```

---

**Note:** Autodelegation can only be configured by Patchwork administrators, i.e. those that can access the ‘admin’ panel. If you require configuration of autodelegation rules on a local instance, contact your Patchwork administrator.

---

In this section there are the following fields:

**User** The patchwork user that should be autodelegated to the patch

**Priority** The priority of the rule relative to other patches. Higher values indicate higher priority. If two rules have the same priority, ordering will be based on the path.

**Path** A path in `fnmatch` format. The `fnmatch` library allows for limited, Unix shell-style wildcarding. Filenames are extracted from patch lines beginning with `---` or `+++`.

You can simply use a bare path:

```
patchwork/views/about.py
```

Or it is also possible to use relative paths, such as:

```
*/manage.py
```

Rules are configured by setting the above fields and saving the rules. These rules will be applied at patch parse time.



---

## Hint Headers

---

Patchwork provides a number of special email headers to control how a patch is handled when it is received. The examples provided below use *git-send-email*, but custom headers can also be set when using tools like *mutt*.

### *X-Patchwork-Hint*

Valid values: ignore

When set, this header will ensure the provided email is not parsed by Patchwork. For example:

```
$ git send-email --add-header="X-Patchwork-Hint: ignore" master
```

### *X-Patchwork-Delegate*

Valid values: An email address associated with a Patchwork user

If set and valid, the user corresponding to the provided email address will be assigned as the delegate of any patch parsed. If invalid, it will be ignored. For example:

```
$ git send-email --add-header="X-Patchwork-Delegate: a@example.com" master
```

### *X-Patchwork-State*

Valid values: Varies between deployments. This can usually be one of “Accepted”, “Rejected”, “RFC” or “Awaiting Upstream”, among others.

If set and valid, the state provided will be assigned as the state of any patch parsed. If invalid, it will be ignored. For example:

```
$ git send-email --add-header="X-Patchwork-State: RFC" master
```



A number of clients are available for interacting with Patchwork's various APIs.

## 5.1 *pwclient*

The *pwclient* application, provided with Patchwork, can be used to interact with Patchwork from the command line. Functionality provided by *pwclient* includes:

- Listing patches, projects, and checks
- Downloading and applying patches to a local code base
- Modifying the status of patches
- Creating new checks

*pwclient* can be downloaded from the [Ozlabs Patchwork instance](#), or at the following path for most other Patchwork instances:

```
http://patchwork.example.com/pwclient/
```

where *patchwork.example.com* corresponds to the URL a Patchwork instance is hosted at.

Once downloaded, view information about all the operations supported by *pwclient*, run:

```
$ pwclient --help
```

## 5.2 *git-pw*

The *git-pw* application can be used to integrate Git with Patchwork. The *git-pw* application relies on the REST API and can be used to interact to list, download and apply series, bundles and individual patches.

More information on *git-pw*, including installation and usage instructions, can be found in the [documentation](#) and the [GitHub repo](#).



This document describes the necessary steps to configure Patchwork in a production environment. This requires a significantly “harder” deployment than the one used for development. If you are interested in developing Patchwork, refer to the *development guide* instead.

This document describes a single-node installation of Patchwork, which will handle the database, server, and application. It is possible to split this into multiple servers, which would provide additional scalability and availability, but this is out of scope for this document.

## 6.1 Deployment Guides, Provisioning Tools and Platform-as-a-Service

Before continuing, it’s worth noting that Patchwork is a Django application. With the exception of the handling of incoming mail (described below), it can be deployed like any other Django application. This means there are tens, if not hundreds, of existing articles and blogs detailing how to deploy an application like this. As such, if any of the below information is unclear then we’d suggest you go search for “Django deployment guide” or similar, deploy your application, and submit a patch for this guide to clear up that confusion for others.

You’ll also find that the same search reveals a significant number of existing deployment tools aimed at Django. These tools, be they written in Ansible, Puppet, Chef or something else entirely, can be used to avoid much of the manual configuration described below. If possible, embrace these tools to make your life easier.

Finally, many Platform-as-a-Service (PaaS) providers and tools support deployment of Django applications with minimal effort. Should you wish to avoid much of the manual configuration, we suggest you investigate the many options available to find one that best suits your requirements. The only issue here will likely be the handling of incoming mail - something which many of these providers don’t support. We address this in the appropriate section below.

## 6.2 Requirements

For the purpose of this guide, we will assume an **Ubuntu 18.04** host: commands, package names and/or package versions will likely change if using a different distro or release. Similarly, usage of different package versions to

the ones suggested may require slightly different configuration. For example, this guide describes configuration with **Python 3** and using Python 2 will require different packages and some minor changes to configuration files.

Before beginning, you should update and restart this system:

```
$ sudo apt-get update -y
$ sudo apt-get upgrade -y
$ sudo reboot
```

Once rebooted, we need to configure some environment variables. These will be used to ease deployment:

**DATABASE\_NAME=patchwork** Name of the database. We'll name this after the application itself.

**DATABASE\_USER=www-data** Username that the Patchwork web application will access the database with. We will use `www-data`, for reasons described later in this guide.

**DATABASE\_PASS=** Password that the Patchwork web application will access the database with. As we're going to use *peer* authentication (more on this later), this will be unset.

**DATABASE\_HOST=** IP or hostname of the database host. As we're hosting the application on the same host as the database and hoping to use *peer* authentication, this will be unset.

**DATABASE\_PORT=** Port of the database host. As we're hosting the application on the same host as the database and using the default configuration, this will be unset.

Export each of these. For example:

```
$ export DATABASE_NAME=patchwork
```

The remainder of the requirements are listed as we install and configure the various components required.

## 6.3 Database

### 6.3.1 Install Requirements

We're going to rely on PostgreSQL, though MySQL is also supported:

```
$ sudo apt-get install -y postgresql postgresql-contrib
```

### 6.3.2 Configure Database

We need to create a database for the system using the database name above. In addition, we need to add database users for two system users, the web user (the user that the web server runs as) and the mail user (the user that the mail server runs as). On Ubuntu these are `www-data` and `nobody`, respectively. PostgreSQL supports *peer* authentication, which uses the standard UNIX authentication method as a backend. This means no database-specific passwords need to be configured.

PostgreSQL created a system user called `postgres`; you will need to run commands as this user.

```
$ sudo -u postgres createdb $DATABASE_NAME
$ sudo -u postgres createuser $DATABASE_USER
$ sudo -u postgres createuser nobody
```

We will also need to apply permissions to the tables in this database but seeing as the tables haven't actually been created yet this will have to be done later.



## 6.4 Patchwork

### 6.4.1 Install Requirements

The first requirement is Patchwork itself. It can be downloaded like so:

```
$ wget https://github.com/getpatchwork/patchwork/archive/v2.1.0.tar.gz
```

We will install this under `/opt`, though this is only a suggestion:

```
$ tar -xvzf v2.1.0.tar.gz
$ sudo mv v2.1.0 /opt/patchwork
```

---

**Important:** Per the [Django documentation](#), source code should not be placed in your web server's document root as this risks the possibility that people may be able to view your code over the Web. This is a security risk.

---

Next we require Python. If not already installed, then you should do so now. Patchwork supports both Python 2.7 and Python 3.3+, though we're going to use the latter to ease future upgrades. Python 3 is installed by default, but you should validate this now:

```
$ sudo apt-get install -y python3
```

We also need to install the various requirements. Let's use system packages for this also:

```
$ sudo apt-get install -y python3-django python3-psycopg2 \
python3-djangorestframework python3-django-filters
```

---

**Tip:** The [pkgs.org](#) website provides a great reference for identifying the name of these dependencies.

---

You can also install requirements using *pip*. If using this method, you can install requirements like so:

```
$ sudo pip install -r /opt/patchwork/requirements-prod.txt
```

### 6.4.2 Configure Patchwork

You will also need to configure a [settings file](#) for Django. A sample settings file is provided that defines default settings for Patchwork. You'll need to configure settings for your own setup and save this as `production.py`.

```
$ cd /opt/patchwork
$ cp patchwork/settings/production{.example,}.py
```

Alternatively, you can override the `DJANGO_SETTINGS_MODULE` environment variable and provide a completely custom settings file.

The provided `production.example.py` settings file is configured to read configuration from environment variables. This suits container-based deployments quite well but for the all-in-one deployment we're configuring here, hardcoded settings makes more sense. If you wish to use environment variables, you should export each setting using the appropriate name, such as `DJANGO_SECRET_KEY`, `DATABASE_NAME` or `EMAIL_HOST`, instead of modifying the `production.py` file as we've done below.

### Databases

We already defined most of the configuration necessary for this in the intro. As a reminder, these were:

- DATABASE\_NAME
- DATABASE\_USER
- DATABASE\_PASSWORD
- DATABASE\_HOST
- DATABASE\_PORT

Configure the DATABASE setting in `production.py` accordingly.

### Static Files

While we have not yet configured our proxy server, we need to configure the location that these files will be stored in. We will install these under `/var/www/patchwork`, though this is only a suggestion and can be changed.

```
$ sudo mkdir -p /var/www/patchwork
```

You can configure this by configuring the `STATIC_ROOT` setting in `production.py`.

```
STATIC_ROOT = '/var/www/patchwork'
```

### Secret Key

The `SECRET_KEY` setting is necessary for Django to generate signed data. This should be a random value and kept secret. You can generate and a value for `SECRET_KEY` with the following Python code:

```
import string, random
chars = string.ascii_letters + string.digits + string.punctuation
print(repr("".join([random.choice(chars) for i in range(0,50)])))
```

Once again, store this in `production.py`.

### Other Options

There are many other settings that may be configured, many of which are described in *Configuration*.

- SECRET\_KEY
- ADMINS
- TIME\_ZONE
- LANGUAGE\_CODE
- DEFAULT\_FROM\_EMAIL
- NOTIFICATION\_FROM\_EMAIL

These are not configurable using environment variables and must be configured directly in the `production.py` settings file instead. For example, if you wish to enable the XML-RPC API, you should add the following:

```
ENABLE_XMLRPC = True
```

Similarly, should you wish to disable the REST API, you should add the following:

```
ENABLE_REST_API = False
```

For more information, refer to *Configuration*.

### 6.4.3 Final Steps

Once done, we should be able to check that all requirements are met using the `check` command of the `manage.py` executable. This must be run as the `www-data` user:

```
$ sudo -u www-data python3 manage.py check
```

We should also take this opportunity to both configure the database and static files:

```
$ sudo -u www-data python3 manage.py migrate
$ sudo python3 manage.py collectstatic
$ sudo -u www-data python3 manage.py loaddata default_tags default_states
```

**Note:** The above `default_tags` and `default_states` fixtures above are just that: defaults. You can modify these to fit your own requirements.

Finally, it may be helpful to start the development server quickly to ensure you can see *something*. For this to function, you will need to add the `ALLOWED_HOSTS` and `DEBUG` settings to the `production.py` settings file:

```
ALLOWED_HOSTS = ['*']
DEBUG = True
```

Now, run the server.

```
$ sudo -u www-data python3 manage.py runserver 0.0.0.0:8000
```

Browse this instance at `http://[your_server_ip]:8000`. If everything is working, kill the development server using `Control-c` and remove `ALLOWED_HOSTS` and `DEBUG`.

## 6.5 Reverse Proxy and WSGI HTTP Servers

### 6.5.1 Install Packages

We will use `nginx` and `uWSGI` to deploy Patchwork, acting as reverse proxy server and WSGI HTTP server respectively. Other options are available, such as `Apache` with the `mod_wsgi` module, or `nginx` with the `Gunicorn` WSGI HTTP server. While we don't document these, sample configuration files for the former case are provided in `lib/apache2/`.

Let's start by installing `nginx` and `uWSGI`:

```
$ sudo apt-get install -y nginx-full uwsgi uwsgi-plugin-python3
```

## 6.5.2 Configure nginx and uWSGI

Configuration files for *nginx* and *uWSGI* are provided in the `lib` subdirectory of the Patchwork source code. These can be modified as necessary, but for now we will simply copy them.

First, let's load the provided configuration for *nginx* and disable the default configuration:

```
$ sudo cp /opt/patchwork/lib/nginx/patchwork.conf \
/etc/nginx/sites-available/
$ sudo unlink /etc/nginx/sites-enabled/default
```

If you wish to modify this configuration, now is the time to do so. Once done, validate and enable your configuration:

```
$ sudo ln -s /etc/nginx/sites-available/patchwork.conf \
/etc/nginx/sites-enabled/patchwork.conf
$ sudo nginx -t
```

Now, use the provided configuration for *uWSGI*:

```
$ sudo mkdir -p /etc/uwsgi/sites
$ sudo cp /opt/patchwork/lib/uwsgi/patchwork.ini \
/etc/uwsgi/sites/patchwork.ini
```

---

**Note:** We created the `/etc/uwsgi` directory above because we're going to run *uWSGI* in *emperor mode*. This has benefits for multi-app deployments.

---

## 6.5.3 Configure Patchwork

For *security reasons*, Django requires you to configure the `ALLOWED_HOSTS` setting, which is a “list of strings representing the host/domain names that this Django site can serve”. To do this, configure the setting in the `production.py` setting file using the hostname(s) and/or IP address(es) from which you will be serving this domain. For example:

```
ALLOWED_HOSTS = ('.example.com', )
```

## 6.5.4 Create systemd Unit File

As things stand, *uWSGI* will need to be started manually every time the system boots, in addition to any time it may fail. We can automate this process using *systemd*. To this end a *systemd* unit file should be created to start *uWSGI* at boot:

```
$ sudo tee /etc/systemd/system/uwsgi.service > /dev/null << EOF
[Unit]
Description=uWSGI Emperor service

[Service]
ExecStartPre=/bin/bash -c 'mkdir -p /run/uwsgi; chown www-data:www-data /run/uwsgi'
ExecStart=/usr/bin/uwsgi --emperor /etc/uwsgi/sites
Restart=always
KillSignal=SIGQUIT
Type=notify
NotifyAccess=all
```

(continues on next page)

(continued from previous page)

```
[Install]
WantedBy=multi-user.target
EOF
```

You should also delete the default service file found in `/etc/init.d` to ensure the unit file defined above is used.

```
sudo rm /etc/init.d/uwsgi
sudo systemctl daemon-reload
```

## 6.5.5 Final Steps

Start the *uWSGI* service we created above:

```
$ sudo systemctl restart uwsgi
$ sudo systemctl status uwsgi
$ sudo systemctl enable uwsgi
```

Next up, restart the *nginx* service:

```
$ sudo systemctl restart nginx
$ sudo systemctl status nginx
$ sudo systemctl enable nginx
```

Finally, browse to the instance using your browser of choice. You may wish to take this opportunity to setup your projects and configure your website address (in the Sites section of the admin console, found at `/admin`).

If there are issues with the instance, you can check the logs for *nginx* and *uWSGI*. There are a couple of commands listed below which can help:

- `sudo systemctl status uwsgi, sudo systemctl status nginx`  
To ensure the services have correctly started
- `sudo cat /var/log/nginx/error.log`  
To check for issues with *nginx*
- `sudo cat /var/log/patchwork.log`  
To check for issues with *uWSGI*. This is the default log location set by the `daemonize` setting in the *uWSGI* configuration file.

## 6.6 Django administrative console

In order to access the administrative console at `/admin`, you need at least one user account to be registered and configured as a super user or staff account to access the Django administrative console. This can be achieved by doing the following:

```
$ python3 manage.py createsuperuser
```

Once the administrative console is accessible, you would want to configure your different sites and their corresponding domain names, which is required for the different emails sent by Patchwork (registration, password recovery) as well as the sample `pwclientrc` files provided by your project's page.

## 6.7 Incoming Email

Patchwork is designed to parse incoming mails which means you need an address to receive email at. This is a problem that has been solved for many web apps, thus there are many ways to go about this. Some of these ways are discussed below.

### 6.7.1 IMAP/POP3

The easiest option for getting mail into Patchwork is to use an existing email address in combination with a mail retriever like `getmail`, which will download mails from your inbox and pass them to Patchwork for processing. `getmail` is easy to set up and configure: to begin, you need to install it:

```
$ sudo apt-get install -y getmail
```

Once installed, you should configure it, substituting your own configuration details where required below:

```
$ sudo tee /etc/getmail/use@example.com/getmailrc > /dev/null << EOF
[retriever]
type = SimpleIMAPSSLRetriever
server = imap.example.com
port = 993
username = XXX
password = XXX
mailboxes = ALL

[destination]
# we configure Patchwork as a "mail delivery agent", in that it will
# handle our mails
type = MDA_external
path = /opt/patchwork/patchwork/bin/parsemail.sh

[options]
# retrieve only new emails
read_all = false
# do not add a Delivered-To: header field
delivered_to = false
# do not add a Received: header field
received = false
EOF
```

Validate that this works as expected by starting `getmail`:

```
$ getmail --getmaildir=/etc/getmail/user@example.com --idle INBOX
```

If everything works as expected, you can create a `systemd` script to ensure this starts on boot:

```
$ sudo tee /etc/systemd/system/getmail.service > /dev/null << EOF
[Unit]
Description=Getmail for user@example.com

[Service]
User=nobody
ExecStart=/usr/bin/getmail --getmaildir=/etc/getmail/user@example.com --idle INBOX
Restart=always
```

(continues on next page)

(continued from previous page)

```
[Install]
WantedBy=multi-user.target
EOF
```

And start the service:

```
$ sudo systemctl start getmail
$ sudo systemctl status getmail
$ sudo systemctl enable getmail
```

## 6.7.2 Mail Transfer Agent (MTA)

The most flexible option is to configure our own mail transfer agent (MTA) or “email server”. There are many options, of which `Postfix` is one. While we don’t cover setting up `Postfix` here (it’s complicated and there are many guides already available), Patchwork does include a script to take received mails and create the relevant entries in Patchwork for you. To use this, you should configure your system to forward all emails to a given localpart (the bit before the @) to this script. Using the patchwork localpart (e.g. `patchwork@example.com`) you can do this like so:

```
$ sudo tee -a /etc/aliases > /dev/null << EOF
patchwork: "|/opt/patchwork/patchwork/bin/parsemail.sh"
EOF
```

You should ensure the appropriate user is created in PostgreSQL and that it has (minimal) access to the database. Patchwork provides scripts for the latter and they can be loaded as seen below:

```
$ sudo -u postgres psql -f \
  /opt/patchwork/lib/sql/grant-all.postgres.sql patchwork
```

---

**Note:** This assumes your `Postfix` process is running as the `nobody` user. If this is not correct (use of `postfix` user is also common), you should change both the username in the `createuser` command above and substitute the username in the `grant-all-postgres.sql` script with the appropriate alternative.

---

## 6.7.3 Use a Email-as-a-Service Provider

Setting up an email server can be a difficult task and, in the case of deployment on PaaS provider, may not even be an option. In this case, there are a variety of web services available that offer “Email-as-as-Service”. These services typically convert received emails into HTTP POST requests to your endpoint of choice, allowing you to sidestep configuration issues. We don’t cover this here, but a simple wrapper script coupled with one of these services can be more than to get email into Patchwork.

You can also create such as service yourself using a PaaS provider that supports incoming mail and writing a little web app.

## 6.8 (Optional) Configure your VCS to Automatically Update Patches

The `tools` directory of the Patchwork distribution contains a file named `post-receive.hook` which is a sample Git hook that can be used to automatically update patches to the *Accepted* state when corresponding commits are pushed via Git.

To install this hook, simply copy it to the `.git/hooks` directory on your server, name it `post-receive`, and make it executable.

This sample hook has support to update patches to different states depending on which branch is being pushed to. See the `STATE_MAP` setting in that file.

If you are using a system other than Git, you can likely write a similar hook using `pwclient` to update patch state. If you do write one, please contribute it.

## 6.9 (Optional) Configure the Patchwork Cron Job

Patchwork can send notifications of patch changes. Patchwork uses a cron management command - `manage.py cron` - to send these notifications and to clean up expired registrations. To enable this functionality, add the following to your crontab:

```
# m h dom mon dow  command
*/10 * * * * cd patchwork; python3 ./manage.py cron
```

---

**Note:** The frequency should be the same as the `NOTIFICATION_DELAY_MINUTES` setting, which defaults to 10 minutes. Refer to the [configuration guide](#) for more information.

---



This document describes the various configuration options available in Patchwork. These options can be used for both *development* and *deployment* installations.

### 7.1 The `settings.py` File

Patchwork is a Django application and, as such, relies on Python-based settings files. Refer to the [Django documentation](#) for more information on the general format.

Patchwork provides three settings files:

`base.py`

A base settings file that should not be used directly.

`dev.py`

A settings file for development use. **This file is horribly insecure and must not be used in production.**

`production.example.py`

A sample settings file for production use. This will likely require some heavy customization. The *deployment guide* provides more information.

### 7.2 Patchwork-specific Settings

Patchwork utilizes a number of Patchwork-only settings in addition to the [Django](#) and [Django REST Framework](#) settings.

#### 7.2.1 `DEFAULT_ITEMS_PER_PAGE`

The default number of items to display in the list pages for a project (`/project/{projectID}/list`) or bundle (`/bundle/{userID}/{bundleName}`).

This is customizable on a per-user basis from the user configuration page.

Changed in version 2.0: This option was previously named `DEFAULT_PATCHES_PER_PAGE`. It was renamed as cover letters are now supported also.

### 7.2.2 CONFIRMATION\_VALIDITY\_DAYS

The number of days to consider an account confirmation request valid. After this interval, the *cron management command* will delete the request.

### 7.2.3 NOTIFICATION\_DELAY\_MINUTES

The number of minutes to wait before sending any notifications to a user. An notification generated during this time are gathered into a single digest email, ensuring users are not spammed with emails from Patchwork.

### 7.2.4 NOTIFICATION\_FROM\_EMAIL

The email address that notification emails should be sent from.

### 7.2.5 ENABLE\_XMLRPC

Enable the *XML-RPC API*.

### 7.2.6 ENABLE\_REST\_API

Enable the *REST API*.

New in version 2.0.

### 7.2.7 REST\_RESULTS\_PER\_PAGE

The number of items to include in REST API responses by default. This can be overridden by the `per_page` parameter for some endpoints.

New in version 2.0.

### 7.2.8 COMPAT\_REDIR

Enable redirections of URLs from previous versions of Patchwork.

### 7.2.9 FORCE\_HTTPS\_LINKS

Force use of `https://` links instead of guessing the scheme based on current access. This is useful if SSL protocol is terminated upstream of the server (e.g. at the load balancer)

---

This document describes the myriad administrative commands available with Patchwork. Many of these commands are referenced in the *development* and *deployment* installation guides.

## 8.1 The `manage.py` Script

Django provides the `django-admin` command-line utility for interacting with Django applications and projects, as described in the [Django documentation](#). Patchwork, being a Django application, provides a wrapper for this command - `manage.py` - that exposes not only the management commands of Django and its default applications, but also a number of custom, Patchwork-only management commands.

An overview of the Patchwork-specific commands is provided below. For information on the commands provided by Django itself, refer to the [Django documentation](#). Information on any command can also be found by passing the `--help` parameter:

```
./manage.py cron --help
```

## 8.2 Available Commands

### 8.2.1 `cron`

```
./manage.py cron
```

Run periodic Patchwork functions: send notifications and expire unused users.

This is required to ensure notifications emails are actually sent to users that request them and is helpful to expire unused users created by spambots. For more information on integration of this script, refer to the [deployment installation guide](#).

## 8.2.2 parsearchive

Parse an mbox archive file and store any patches/comments found.

```
./manage.py parsearchive [--list-id <list-id>] <infile>
```

This is mostly useful for development or for adding message that were missed due to, for example, an outage.

**--list-id** <list-id>

mailing list ID. If not supplied, this will be extracted from the mail headers.

**infile**

input mbox filename

## 8.2.3 parsemail

Parse an mbox file and store any patch/comment found.

```
./manage.py parsemail [--list-id <list-id>] <infile>
```

This is the main script used to get mails (and therefore patches) into Patchwork. It is generally used by the `parsemail.sh` script in combination with a mail transfer agent (MTA) like Postfix. For more information, refer to the [deployment installation guide](#).

**--list-id** <list-id>

mailing list ID. If not supplied, this will be extracted from the mail headers.

**infile**

input mbox filename. If not supplied, a patch will be read from `stdin`.

## 8.2.4 rehash

Update the hashes on existing patches.

```
./manage.py rehash [<patch_id>, ...]
```

Patchwork stores hashes for each patch it receives. These hashes can be used to uniquely identify a patch for things like *automatically changing the state of the patch in Patchwork when it merges*. If you change your hashing algorithm, you may wish to rehash the patches.

**patch\_id**

a patch ID number. If not supplied, all patches will be updated.

## 8.2.5 retag

Update the tag (Ack/Review/Test) counts on existing patches.

```
./manage.py retag [<patch_id>...]
```

Patchwork extracts *tags* from each patch it receives. By default, three tags are extracted, but it's possible to change this on a per-instance basis. Should you add additional tags, you may wish to scan older patches for these new tags.

**patch\_id**

a patch ID number. If not supplied, all patches will be updated.

This document provides some general tips and tricks that one can use when upgrading an existing, production installation of Patchwork. If you are interested in the specific changes between each release, refer to </releases/index> instead. If this is your first time installing Patchwork, refer to the [Installation](#) instead.

## 9.1 Before You Start

Before doing anything, always **backup your data**. This generally means backing up your database, but it might also be a good idea to backup your environment in case you encounter issues during the upgrade process.

While Patchwork won't explicitly prevent it, it's generally wise to avoid upgrades spanning multiple releases in one go. An iterative upgrade approach will provide an easier, if slower, upgrade process.

## 9.2 Identify Changed Scripts, Requirements, etc.

</releases/index> provides a comprehensive listing of all backwards-incompatible changes that occur between releases of Patchwork. Examples of such changes include:

- Moved/removed scripts and files
- Changes to the requirements, e.g. supported Django versions
- Changes to API that may affect, for example, third-party tools

It is important that you understand these changes and ensure any scripts you may have, such as systemd scripts, are modified accordingly.

## 9.3 Understand What Requirements Have Changed

New versions of Patchwork can often require additional or updated version of dependencies, e.g. newer versions of Django. It is important that you understand these requirements and can fulfil them. This is particularly true for users

relying on distro-provided packages, who may have to deal with older versions of a package or may be missing a package altogether (though we try to avoid this). Such changes are usually listed in the `/releases/index`, but you can also diff the `requirements.txt` files in each release for comparison.

## 9.4 Collect Static Files

New versions of Patchwork generally contain changes to the additional files like images, CSS and JavaScript. To do this, run the `collectstatic` management commands:

```
$ ./manage.py collectstatic
```

## 9.5 Upgrade Your Database

New versions of Patchwork may provide a number of schema and/or data migrations which must be applied before starting the instance. To do this, run the `migrate` management command:

```
$ ./manage.py migrate
```

For more information on migrations, refer to [the Django documentation](#).

## 10.1 Coding Standards

**Follow PEP8.** All code is currently PEP8 compliant and it should stay this way.

Changes that fix semantic issues will be generally be happily received, but please keep such changes separate from functional changes.

*pep8* targets are provided via *tox*. Refer to the [Testing](#) section below for more information on usage of this tool.

## 10.2 Testing

Patchwork includes a *tox* script to automate testing. This requires a functional database and some Python requirements like *tox*. Refer to [Installation](#) for information on how to configure these.

You may also need to install *tox*. If so, do this now:

```
$ pip install --user tox
```

**Tip:** If you're using Docker, you may not need to install *tox* locally. Instead, it will already be installed inside the container. For Docker, you can run *tox* like so:

```
$ docker-compose run --rm web tox [ARGS...]
```

For more information, refer to [Docker-Based Installation](#).

Assuming these requirements are met, actually testing Patchwork is quite easy to do. To start, you can show the default targets like so:

```
$ tox -l
```

You'll see that this includes a number of targets to run unit tests against the different versions of Django supported, along with some other targets related to code coverage and code quality. To run one of these, use the `-e` parameter:

```
$ tox -e py27-django18
```

In the case of the unit tests targets, you can also run specific tests by passing the fully qualified test name as an additional argument to this command:

```
$ tox -e py27-django18 patchwork.tests.SubjectCleanUpTest
```

Because Patchwork support multiple versions of Django, it's very important that you test against all supported versions. When run without argument, tox will do this:

```
$ tox
```

## 10.3 Release Notes

Patchwork uses [reno](#) for release note management. To use *reno*, you must first install it:

```
$ pip install --user reno
```

Once installed, a new release note can be created using the `reno new` command:

```
$ reno new <slugified-summary-of-change>
```

Modify the created file, removing any irrelevant sections, and include the modified file in your change.

## 10.4 API

As discussed in [Release Process](#), the API is versioned differently from Patchwork itself. Should you make changes to the API, you need to ensure these only affect newer versions of the API. Refer to previous changes in the `patchwork/api` directory and to the [Django REST Framework documentation](#) for more information.

---

**Important:** All API changes should be called out in *release notes* using the `api` section.

---

## 10.5 Reporting Issues

You can report issues to the [mailing list](#) or the [GitHub issue tracker](#).

## 10.6 Submitting Changes

All patches should be sent to the [mailing list](#). You must be subscribed to the list in order to submit patches. Please abide by the [QEMU guidelines](#) on contributing or submitting patches. This covers both the initial submission and any follow up to the patches. In particular, ensure:

- *All tests pass*
- Documentation has been updated with new requirements, new script names etc.



- *A release note is included*

Patches should ideally be submitted using the *git send-email* tool.

## 10.7 Mailing Lists

Patchwork uses a single mailing list for development, questions and announcements.

[patchwork@lists.ozlabs.org](mailto:patchwork@lists.ozlabs.org)

Further information about the Patchwork mailing list is available can be found on [lists.ozlabs.org](http://lists.ozlabs.org).



This document describes the necessary steps to configure Patchwork in a development environment. If you are interested in deploying Patchwork in a production environment, refer to [the deployment guide](#) instead.

To begin, you should clone Patchwork:

```
$ git clone git://github.com/getpatchwork/patchwork.git
```

## 11.1 Docker-Based Installation

Patchwork provides a Docker-based environment for quick configuration of a development environment. This is the preferred installation method. To configure Patchwork using Docker:

1. Install `docker` and `docker-compose`.
2. Create a `.env` file in the root directory of the project and store your `UID` attribute there.

```
$ echo "UID=$UID" > .env
```

3. Build the images. This will download over 200MB from the internet:

```
$ docker-compose build
```

4. Run `docker-compose up`:

```
$ docker-compose up
```

This will be visible at <http://localhost:8000/>.

To run a shell within this environment, run:

```
$ docker-compose run --rm web --shell
```

To run `django-manage` commands, such as `createsuperuser` or `migrate`, run:

```
$ docker-compose run --rm web python manage.py createsuperuser
```

To access the SQL command-line client, run:

```
$ docker-compose run --rm web python manage.py dbshell
```

To run unit tests against the system Python packages, run:

```
$ docker-compose run --rm web python manage.py test
```

To run unit tests for multiple versions using `tox`, run:

```
$ docker-compose run --rm web tox
```

To reset the database before any of these commands, add `--reset` to the command line after `web` and before any other arguments. Conversely, to backup the database at any stage, run:

```
$ docker exec DATABASECONTAINER /usr/bin/mysqldump -u DATABASEUSER \  
--password=DATABASEPASSWORD DATABASE > backup.sql
```

where `DATABASECONTAINER` is found by `docker ps -a` and the other settings are the same as those defined in `patchwork/settings/dev.py`. To restore this again, run:

```
$ docker-compose run --rm web python manage.py dbshell  
mysql> use DATABASE;  
mysql> set autocommit=0; source backup.sql; commit;  
mysql> exit;
```

Any local edits to the project files made locally are immediately visible to the Docker container, and so should be picked up by the Django auto-reloader.

For more information on Docker itself, please refer to the [docker](#) and [docker-compose](#) documentation.

---

**Note:** If using SELinux, you will need to create a custom SELinux rule to allow the Docker process to access your working directory. Run:

```
$ chcon -RT svirt_sandbox_file_t $PATCHWORK_DIR
```

where `$PATCHWORK_DIR` is the absolute path to the `patchwork` folder created when you cloned the repo. For more information, see *man docker run*.

---

**Note:** If you see an error like the below:

```
ERROR: Couldn't connect to the Docker daemon at http+docker://localunixsocket - is it_  
↪running?
```

ensure you have correctly installed Docker, added your user to the `docker` group, and started the daemon, per the [docker documentation](#).

---

**Note:** If you see an error like the below:

```
You must define UID in .env
```

Ensure you have created a `.env` file in the root of your project directory and stored the `UID` attribute there. For more information on why this is necessary, refer to this [docker-compose issue](#).

---

## 11.2 Manual Installation

Manual installation can be used where use of Docker is not possible or desired.

### 11.2.1 Install Required Packages

There are a number of different requirements for developing Patchwork:

- Python and libraries
- A supported database (RDBMS)

These are detailed below.

#### Python Requirements

To develop Python-based software you first need Python. Patchwork supports both Python 2.7 and Python 3.3+. One of these will be installed by default on many installations, though they can also be installed manually using the *python* or *python3* packages.

It's a good idea to use [virtual environments](#) to develop Python software. Virtual environments are “instances” of your system Python without any of the additional Python packages installed. They are useful to develop and possibly deploy Patchwork against a “well known” set of dependencies, but they can also be used to test Patchwork against several versions of Django.

If you do not have *virtualenv* installed then you should install it now. This can be installed using the *python-virtualenv* or *python3-virtualenv* packages. Alternatively you can install these using *pip*.

It is also helpful to install *tox* which is used for running tests in Patchwork. This can be installed using the *python-tox* or *python3-tox* packages, or via *pip*.

#### Database Requirements

If not already installed, you may need to install an RDBMS. You can use either MariaDB/MySQL or PostgreSQL for this purpose. You should also install the development headers, known as *libmysqlclient-dev* or *libpq-dev* respectively on Debian-based distros like Ubuntu and *mysql-devel* or *postgresql-devel* on RHEL-based distros.

---

**Note:** While Django provides support for [multiple database backends](#), Patchwork itself is only tested against MySQL/MariaDB and PostgreSQL. Should you wish to use a different backend, ensure you validate this first (and perhaps upstream any changes you may find necessary).

---

---

**Note:** You may be tempted to use SQLite to develop Patchwork. We'd advise against doing this. SQLite supports a subset of the functionality of “full” RDBMS like MySQL: for example, case-sensitive matching of Unicode is [not supported](#). You will find some tests provided by Patchwork fail and some patches you develop may fail in production due to these differences.

---

## Example Installation

An example for installing all these packages and the MySQL RDBMS on Ubuntu 15.04 is given below:

```
$ sudo apt-get install python python-pip python-dev python-virtualenv \
python-tox mysql-server libmysqlclient-dev
```

If you have an existing MariaDB/MySQL installation and have installed *pip* already/are using Python 3.4+ then you can install all packages using *pip*:

```
$ sudo pip install virtualenv tox
```

If you wish to use Python 3 then simply replace *python* with *python3* in the above command.

## 11.2.2 Configure Virtual Environment

---

**Note:** If you are interested in simply *testing Patchwork*, many of the below steps are not required. *tox* will automatically install dependencies and use virtual environments when testing.

---

Once these requirements are installed, you should create and activate a new virtual environment. This can be done like so:

```
$ virtualenv .venv
$ source .venv/bin/activate
(.venv)$
```

---

**Note:** If you installed a Python 3.x-based virtual environment package, adjust the executable indicated above as necessary, e.g. *virtualenv-3.4*.

---

Now install the packages. Patchwork provides three requirements files.

*requirements-dev.txt*

Packages required to configure a development environment

*requirements-prod.txt*

Packages required for deploying Patchwork in production

*requirements-test.txt*

Packages required to run tests

We're going to install the first of these, which can be done like so:

```
(.venv)$ cd patchwork
(.venv)$ pip install -r requirements-dev.txt
```

---

**Note:** Once configured this does not need to be done again *unless* the requirements change, e.g. Patchwork requires an updated version of Django.

---

### 11.2.3 Initialize the Database

Once installed, the database must be configured. We will assume you have root access to the database for these steps.

To begin, export your database credentials as follows:

```
(.venv)$ db_user=root
(.venv)$ db_pass=password
```

Now, create the database. If this is your first time configuring the database, you must create a *patchwork* user (or similar) along with the database instance itself. The commands below will do this, dropping existing databases if necessary:

```
(.venv)$ mysql -u$db_user -p$db_pass << EOF
DROP DATABASE IF EXISTS patchwork;
CREATE DATABASE patchwork CHARACTER SET utf8;
GRANT ALL PRIVILEGES ON patchwork.* TO 'patchwork'@'localhost'
    IDENTIFIED BY 'password';
EOF
```

**Note:** The *patchwork* username and *password* password are the defaults expected by the provided *dev* settings files. If using something different, export the *PW\_TEST\_DB\_USER* and *PW\_TEST\_DB\_PASS* variables described in the *Environment Variables* section below. Alternatively, you can create your own settings file with these variables hardcoded and change the value of *DJANGO\_SETTINGS\_MODULE* as described below.

### 11.2.4 Load Initial Data

Before continuing, we need to tell Django where it can find our configuration. Patchwork provides a default development *settings.py* file for this purpose. To use this, export the *DJANGO\_SETTINGS\_MODULE* environment variable as described below:

```
(.venv)$ export DJANGO_SETTINGS_MODULE=patchwork.settings.dev
```

Alternatively you can provide your own *settings.py* file and provide the path to that instead.

Once done, we need to create the tables in the database. This can be done using the *migrate* command of the *manage.py* executable:

```
(.venv)$ ./manage.py migrate
```

Next, you should load the initial fixtures into Patchwork. These initial fixtures provide:

*default\_tags.xml*

The tags that Patchwork will extract from mails. For example: *Acked-By*, *Reviewed-By*

*default\_states.xml*

The states that a patch can be in. For example: *Accepted*, *Rejected*

*default\_projects.xml*

A default project that you can then upload patches for

These can be loaded using the *loaddata* command:

```
(.venv)$ ./manage.py loaddata default_tags default_states default_projects
```

You should also take the opportunity to create a “superuser”. You can do this using the aptly-named *createsuperuser* command:

```
(.venv)$ ./manage.py createsuperuser
```

## 11.3 Import Mailing List Archives

Regardless of your installation method of choice, you will probably want to load some real emails into the system. This can be done manually, however it’s generally much easier to download an archive from a Mailman instance and load these using the *parsearchive* command. You can do this like so:

```
(.venv)$ mm_user=<myusername>
(.venv)$ mm_pass=<mypassword>
(.venv)$ mm_host=https://lists.ozlabs.org
(.venv)$ mm_url=$mm_host/private/patchwork.mbox/patchwork.mbox
(.venv)$ curl -F username=$mm_user -F password=$mm_pass -k -O $mm_url
```

where *mm\_user* and *mm\_pass* are the username and password you have registered with on the Mailman instance found at *mm\_host*.

---

**Note:** We provide instructions for downloading archives from the Patchwork mailing list, but almost any instance of Mailman will allow downloading of archives as seen above; simply change the *pw\_url* variable defined. You can find more informations about this [here](#).

---

Load these archives into Patchwork. Depending on the size of the downloaded archives this may take some time:

```
(.venv)$ ./manage.py parsearchive --list-id=patchwork.ozlabs.org \
patchwork.mbox
```

Finally, run the server and browse to the IP address of your board using your browser of choice:

```
(.venv)$ ./manage.py runserver 0.0.0.0:8000
```

Once finished, you can kill the server (*Ctrl + C*) and exit the virtual environment:

```
(.venv)$ deactivate
$
```

Should you wish to re-enter this environment, simply source the *activate* script again.

## 11.4 Django Debug Toolbar

Patchwork installs and enables the ‘Django Debug Toolbar’ by default. However, by default this is only displayed if you are developing on localhost. If developing on a different machine, you should configure an SSH tunnel such that, for example, *localhost:8000* points to *[DEV\_MACHINE\_IP]:8000*.



## 11.5 Environment Variables

The following environment variables are available to configure settings when using the provided *dev* settings file.

*PW\_TEST\_DB\_NAME=patchwork*

Name of the database

*PW\_TEST\_DB\_USER=patchwork*

Username to access the database with

*PW\_TEST\_DB\_PASS=password*

Password to access the database with<

*PW\_TEST\_DB\_TYPE=mysql*

Type of database to use. Options: 'mysql', 'postgres'



### 12.1 Versioning

There are two types of versioning in play in Patchwork: the version for Patchwork itself (i.e. the code or *core*) and the version for the *REST API* `<../api/rest>`.

#### 12.1.1 Patchwork Code

Since version 1.0, Patchwork has implemented a version of *Semantic Versioning*. To summarise, releases take the format **MAJOR.MINOR.PATCH** (or just **MAJOR.MINOR**). We increment:

1. **MAJOR** version when we make major UI changes or functionality updates
2. **MINOR** version when we make minor UI changes or functionality updates
3. **PATCH** version when we make make bug fixes, dependency updates etc.

In Git, each release will have a tag indicating the version number. In addition, each release series has it's own branch called *stable/MAJOR.MINOR* to allow backporting of bugfixes or security updates to older versions.

#### 12.1.2 REST API

The REST API also uses a variant of *Semantic Versioning*. To summarise, API versions take the format **MAJOR.MINOR**. We increment:

1. **MAJOR** version when we make breaking changes to the API. This generally means removing an API or fields in an API.
2. **MINOR** version when we add functionality in a backwards-compatible manner. This generally means adding new fields and endpoint.

These version numbers are exposed via the API and it's possible to request a specific version in the URL. Refer to the *API Guide* `<../api/rest>` for more information.

## 12.2 Release Cycle

There is no cadence for releases: they are made available as necessary.

## 12.3 Supported Versions

Typically all development should occur on `master`. While we will backport bugfixes and security updates, we will not backport any new features. This is to ensure stability for users of these versions of Patchwork.

## 12.4 Release Checklist

The follow steps apply to all releases:

- Documentation has been updated with latest release version
- Documentation references latest supported version of Django
- ‘alpha’ tag has been removed from `__version__` in `patchwork/__init__.py`
- Commit has been tagged with an [annotated tag](#). The tag should take the form `v[MAJOR].[MINOR].[PATCH]`, e.g. `v2.0.1`. The message should read:

```
Version [MAJOR].[MINOR].[PATCH]
```

- A [GitHub Release](#), with text corresponding to an abbreviated form of the release notes for that cycle, has been created
- An email describing the release and top-level overview of the changes has been sent to the mailing list. Refer to the emails for [Patchwork v2.0.0](#) and [Patchwork v2.0.1](#) for examples.

The following only apply to full releases, or those where the **MAJOR** or **MINOR** number is incremented:

- A new branch called `stable/MAJOR.MINOR` has been created from the tagged commit

Once released, bump the version found in `patchwork/__init__.py` once again.

## 12.5 Backporting

We will occasionally backport bugfixes and security updates. When backporting a patch, said patch should first be merged into `master`. Once merged, you can backport by cherry-picking commits, using the `-x` flag for posterity:

```
$ git cherry-pick -x <master_commit>
```

There may be some conflicts; resolve these, uncommenting the *Conflicts* line when committing:

```
Conflicts
  patchwork/bin/pwclient
```

When enough patches have been backported, you should release a new **PATCH** release.

## CHAPTER 13

---

### Using the APIs

---

Patchwork provides two APIs: the legacy *XML-RPC API* and the *REST API*. You can use these APIs to interact with Patchwork programmatically and to develop your own clients.

For quick usage examples of the APIs, refer to the documentation. For examples of existing clients, refer to *Clients*.



Patchwork relies on a number of third-party JavaScript libraries. These, along with their supporting assets and the Patchwork-only libraries and assets, are described below.

### 14.1 CSS

`bootstrap.min.css`

CSS for the *Bootstrap* library.

Refer to the *js* section below for more information on *Bootstrap*.

`selectize.bootstrap3.css`

CSS for the *Selectize* library.

Refer to the *js* section below for more information on *Selectize*.

`style.css`

Custom, Patchwork styling. Mostly a collection of overrides for default Bootstrap styles.

Part of Patchwork.

### 14.2 fonts

`glyphicons-halflings-regular.*`

Library of precisely prepared monochromatic icons and symbols, created with an emphasis to simplicity and easy orientation. Provided as part of the Bootstrap library.

These are in multiple formats to support different browsers/environments. Refer to the *js* section below for more information on Bootstrap.

## 14.3 js

`bootstrap.js`

The most popular HTML, CSS, and JavaScript framework for developing responsive, mobile first projects on the web.

This is used for the main UI of Patchwork.

**Website** <https://getbootstrap.com/>

**GitHub** <https://github.com/twbs/bootstrap/>

**Version** 3.2.0

`bundle.js`

Utility functions for bundle patch list manipulation (re-ordering patches, etc.)

Part of Patchwork.

`clipboard.min.js`

Modern copy to clipboard. No Flash. Just 3kb gzipped

This is used to allow us to “click to copy” various elements in the UI.

**Website** <https://clipboardjs.com/>

**GitHub** <https://github.com/zenorocha/clipboard.js/>

**Version** 1.7.1

`jquery.js`

jQuery is a fast, small, and feature-rich JavaScript library. It makes things like HTML document traversal and manipulation, event handling, animation, and Ajax much simpler with an easy-to-use API that works across a multitude of browsers. With a combination of versatility and extensibility, jQuery has changed the way that millions of people write JavaScript.

This is used across Patchwork, including by the likes of `bundle.js`, as well as by the various plugins below.

**Website** <https://jquery.com/>

**GitHub** <https://github.com/jquery/jquery>

**Version** 1.10.1

`jquery.checkboxes.js`

A jQuery plugin that gives you nice powers over your checkboxes.

This is used to allow shift-select of checkboxes on the patch list page.

**Website** <http://rmariuzzo.github.io/checkboxes.js>

**GitHub** <https://github.com/rmariuzzo/checkboxes.js>

**Version** 1.0.6

`jquery.stickytableheaders.js`

A jQuery plugin that makes large tables more usable by having the table header stick to the top of the screen when scrolling.

This is used to ensure the heads on the patch list page stay at the top as we scroll.



**GitHub** <https://github.com/jmosbech/StickyTableHeaders>

**Version** 0.1.19

`jquery.tablednd.js`

jQuery plug-in to drag and drop rows in HTML tables.

This is used by the bundle patch list to allow us to control the order of the patches in said bundle.

**Website** <http://www.isocra.com/2008/02/table-drag-and-drop-jquery-plugin/>

**GitHub** [jQuery plug-in to drag and drop rows in HTML tables](#)

**Version** ???

`selectize.min.js`

Selectize is the hybrid of a `textbox` and `<select>` box. It's jQuery based and it has autocomplete and native-feeling keyboard navigation; useful for tagging, contact lists, etc.

**Website** <https://selectize.github.io/selectize.js/>

**GitHub** <https://github.com/selectize/selectize.js>

**Version** 0.11.2



Patchwork provides a REST API. This API can be used to retrieve and modify information about patches, projects and more.

This guide provides an overview of how one can interact with the REST API. For detailed information on type and response format of the various resources exposed by the API, refer to the web browsable API. This can be found at:

<https://patchwork.example.com/api/1.1/>

where *patchwork.example.com* refers to the URL of your Patchwork instance.

---

**Important:** The REST API can be enabled/disabled by the administrator: it may not be available in every instance. Refer to `/about` on your given instance for the status of the API, e.g.

<https://patchwork.ozlabs.org/about>

---

New in version 2.0: The REST API was introduced in Patchwork v2.0. Users of earlier Patchwork versions should instead refer to *XML-RPC API* documentation.

Changed in version 2.1: The API version was bumped to v1.1 in Patchwork v2.1. The older v1.0 API is still supported. For more information, refer to *Supported Versions*.

## 15.1 Getting Started

The easiest way to start experimenting with the API is to use the web browsable API, as described above.

REST APIs run over plain HTTP(S), thus, the API can be interfaced using applications or libraries that support this widespread protocol. One such application is `curl`, which can be used to both retrieve and send information to the REST API. For example, to get the version of the REST API for a Patchwork instance hosted at *patchwork.example.com*, run:

```
$ curl -s 'https://patchwork.example.com/api/1.1/' | python -m json.tool
{
```

(continues on next page)

(continued from previous page)

```
"bundles": "https://patchwork.example.com/api/1.1/bundles/",
"covers": "https://patchwork.example.com/api/1.1/covers/",
"events": "https://patchwork.example.com/api/1.1/events/",
"patches": "https://patchwork.example.com/api/1.1/patches/",
"people": "https://patchwork.example.com/api/1.1/people/",
"projects": "https://patchwork.example.com/api/1.1/projects/",
"series": "https://patchwork.example.com/api/1.1/series/",
"users": "https://patchwork.example.com/api/1.1/users/"
}
```

In addition, a huge variety of libraries are available for interacting with and parsing the output of REST APIs. The `requests` library is wide-spread and well-supported. To repeat the above example using `requests`, run

```
$ python
>>> import json
>>> import requests
>>> r = requests.get('https://patchwork.example.com/api/1.1/')
>>> print(json.dumps(r.json(), indent=2))
{
  "bundles": "https://patchwork.example.com/api/1.1/bundles/",
  "covers": "https://patchwork.example.com/api/1.1/covers/",
  "events": "https://patchwork.example.com/api/1.1/events/",
  "patches": "https://patchwork.example.com/api/1.1/patches/",
  "people": "https://patchwork.example.com/api/1.1/people/",
  "projects": "https://patchwork.example.com/api/1.1/projects/",
  "series": "https://patchwork.example.com/api/1.1/series/",
  "users": "https://patchwork.example.com/api/1.1/users/"
}
```

Tools like `curl` and libraries like `requests` can be used to build anything from small utilities to full-fledged clients targeting the REST API. For an overview of existing API clients, refer to *Clients*.

**Tip:** While you can do a lot with existing installations, it's possible that you might not have access to all resources or may not wish to modify any existing resources. In this case, it might be better to *deploy your own instance of Patchwork locally* and experiment with that instead.

## 15.2 Versioning

By default, all requests will receive the latest version of the API: currently 1.1:

```
GET /api HTTP/1.1
```

You should explicitly request this version through the URL to prevent API changes breaking your application:

```
GET /api/1.1 HTTP/1.1
```

Older API versions will be deprecated and removed over time. For more information, refer to *Supported Versions*.

## 15.3 Schema

Responses are returned as JSON. Blank fields are returned as `null`, rather than being omitted. Timestamps use the ISO 8601 format, times are by default in UTC:

```
YYYY-MM-DDTHH:MM:SSZ
```

Requests should use either query parameters or form-data, depending on the method. Further information is provided below.

### 15.3.1 Summary Representations

Some resources are particularly large or expensive to compute. When listing these resources, a summary representation is returned that omits certain fields. To get all fields, fetch the detailed representation. For example, listing patches will return summary representations for each patch:

```
GET /patches HTTP/1.1
```

### 15.3.2 Detailed Representations

When fetching an individual resource, all fields will be returned. For example, fetching a patch with an ID of 123 will return all available fields for that particular resource:

```
GET /patches/123 HTTP/1.1
```

## 15.4 Parameters

Most API methods take optional parameters. For GET requests, these parameters are mostly used for filtering and should be passed as a HTTP query string parameters:

```
$ curl 'https://patchwork.example.com/api/patches?state=under-review'
```

For all other types of requests, including POST and PATCH, these parameters should be passed as form-encoded data:

```
$ curl -X PATCH -F 'state=under-review' \  
  'https://patchwork.example.com/api/patches/123'
```

Changed in version 2.1: API version 1.1 allows filters to be specified multiple times. Prior to this, only the last value for a given filter key would be used.

## 15.5 Authentication

Patchwork supports authentication using your username and password (basic authentication) or with a token (token authentication). The latter is recommended.

To authenticate with token authentication, you must first obtain a token. This can be done from your profile, e.g. <https://patchwork.example.com/profile>. Once you have a token, run:

```
$ curl -H "Authorization: Token ${token}" \
  'https://patchwork.example.com/api/'
```

To authenticate using basic auth, you should use your Patchwork username and password. To do this, run:

```
$ curl -u ${username}:${password} \
  'https://patchwork.example.com/api/'
```

Not all resources require authentication. Those that do will return 404 (Not Found) if authentication is not provided to avoid leaking information.

## 15.6 Pagination

Requests that return multiple items will be paginated by 30 items by default, though this can vary from instance to instance. You can change page using the `?page` parameter. You can also set custom page sizes up to 100 on most endpoints using the `?per_page` parameter.

```
$ curl 'https://patchwork.example.com/api/patches?page=2&per_page=100'
```

### 15.6.1 Link Header

The `Link` header includes pagination information:

```
Link: <https://patchwork.example.com/api/patches?page=3&per_page=100>; rel="next",
      <https://patchwork.example.com/api/patches?page=50&per_page=100>; rel="last"
```

The possible `rel` values are:

| Name               | Description   |
|--------------------|---|
| <code>next</code>  | The link relation for the immediate next page of results.     |
| <code>last</code>  | The link relation for the last page of results.               |
| <code>first</code> | The link relation for the first page of results.              |
| <code>prev</code>  | The link relation for the immediate previous page of results. |

## 15.7 Supported Versions

| API Version | Since | Supported? |
|-------------|-------|------------|
| 1.0         | 2.0   | ✓          |
| 1.1         | 2.1   | ✓          |

Further information about this and more can typically be found in the release notes.

# CHAPTER 16

---

## The XML-RPC API

---

Patchwork provides an XML-RPC API. This API can be used to be used to retrieve and modify information about patches, projects and more.

---

**Important:** The XML-RPC API can be enabled/disabled by the administrator: it may not be available in every instance. Refer to `/about` on your given instance for the status of the API, e.g.

<https://patchwork.ozlabs.org/about>

Alternatively, simply attempt to make a request to the API.

---

Deprecated since version 2.0: The XML-RPC API is a legacy API and has been deprecated in favour of the *REST API*. It will be removed in Patchwork 3.0.

## 16.1 Getting Started

The Patchwork XML-RPC API provides a number of “methods”. Some methods require authentication (via HTTP Basic Auth) while others do not. Authentication uses your Patchwork account and the on-server documentation will indicate where it is necessary. We will only cover the unauthenticated method here for brevity - consult the `xmlrpclib` documentation for more detailed examples:

To interact with the Patchwork XML-RPC API, a XML-RPC library should be used. Python provides such a library - `xmlrpclib` - in its standard library. For example, to get the version of the XML-RPC API for a Patchwork instance hosted at `patchwork.example.com`, run:

```
$ python
>>> import xmlrpclib # or 'xmlrpc.client' for Python 3
>>> rpc = xmlrpclib.ServerProxy('http://patchwork.example.com/xmlrpc/')
>>> rpc.pw_rpc_version()
1.1
```

Once connected, the `rpc` object will be populated with a list of available functions (or procedures, in RPC terminology). In the above example, we used the `pw_rpc_version` method, however, it should be possible to use all the methods listed in the server documentation.

## 16.2 Further Information

Patchwork provides automatically generated documentation for the XML-RPC API. You can find this at the following URL:

<https://patchwork.example.com/xmlrpc/>

where *patchwork.example.com* refers to the URL of your Patchwork instance.

Changed in version 1.1: Automatic documentation generation for the Patchwork API was introduced in Patchwork v1.1. Prior versions of Patchwork do not offer this functionality.



### 17.1 v2.1.0-rc2-9

#### 17.1.1 New Features

- The `pwclient get` command will now download patches with a `.patch` extension.

#### 17.1.2 Bug Fixes

- If a patch was processed by Patchwork before series support was added, it will not have a series associated with it. As a result, it is not possible to extract the dependencies for that patch from the series. This was not previously handled correctly. A 404 is now raised if this occurs.
- The `parsemail.sh` and `parsemail-batch.sh` scripts, found in `patchwork/bin`, will now default to using `python` rather than `python2` for calling `manage.py`. This resolves an issue when Patchwork is deployed with a `virtualenv`.

### 17.2 v2.1.0-rc1

#### 17.2.1 Prelude

The key part of this release is a major performance fix - denormalising the project field into patch model so that counting a project’s patches doesn’t require a JOIN. This requires a migration and so isn’t suitable for a stable backport. Event listing in the API has also been sped up by refactoring the queries.

This release also includes the feature development that had accrued in the mean time and numerous bug fixes.

The REST API version has been bumped to 1.1.

## 17.2.2 New Features

- Django 1.11 is now supported.
- Allow list filtering into multiple projects (and email dropping) based on subject prefixes. Enable by specifying a regular expression which needs to be matched in the subject on a per-project basis (field `subject_match`). Project with empty `subject_match` field (and matching `list_id`) serves as a default in case of no match.
- Python 3.6 is now supported.

## 17.2.3 Known Issues

- Series parsing in the presence of parallel mail processing is still unreliable.
- Several more minor issues can be browsed on our [issue tracker](#).

## 17.2.4 Upgrade Notes

- Django 1.6 and 1.7 are no longer supported. These are no longer supported upstream and most distributions provide a newer version.
- `django-filter` 0.11 is no longer supported. This was only used with Django 1.6 and 1.7 and is not compatible with any version supported by Patchwork.

## 17.2.5 Bug Fixes

- A nasty race condition bug that could cause patches in a series to be dropped has been fixed.

## 17.2.6 API Changes

- Links to related comments are now exposed when checking patch and cover letter details. The comments themselves are then available via `/patches/{patchID}/comments` and `/covers/{coverID}/comments` endpoints. Please note that comments are available only since API version 1.1
- Cover letters embedded in other responses now provide an mbox link, which can be used to download the cover letter and associated metadata (tags) in mbox format.
- Series, patches and cover letters can be filtered by submitter using email addresses. For example:

```
$ curl /covers/?submitter=stephen@that.guru
```

- Bundles can be filtered by owner, patches by delegate and checks by user using username. For example:

```
$ curl /bundles/?owner=stephenfin
```

- Filters can now be specified multiple times. For example:

```
$ curl /patches/?state=under-review&state=rfc
```

This operates as a logical OR: it will retrieve patches that are either Under Review or RFC.

- The `/project` endpoint now exposes a `subject_match` attribute.
- Messages headers that use the same key, such as `Received:` are now combined into a list. Previously only one of the values would be output. This affects the `/covers` and `/patches` endpoints.

## 17.2.7 Other Notes

- The patch ID on the patch detail page can now be clicked to copy it. This is similar to what we already do on the patch list page.
- mbox files now contain all headers from the original email. This also means the `Subject :` header included will contain the original subject and not the parsed Patchwork's version.
- Unify timezones used – use UTC for both email submissions and internal events. Please note that this change doesn't modify already existing data so in case the instance's timezone is UTC+XX, events will appear out of order (as if they happened earlier) for XX hours in the events API feed.



### 18.1 v2.0.3

#### 18.1.1 Bug Fixes

- If a patch was processed by Patchwork before series support was added, it will not have a series associated with it. As a result, it is not possible to extract the dependencies for that patch from the series. This was not previously handled correctly. A 404 is now raised if this occurs.
- The `parsemail.sh` and `parsemail-batch.sh` scripts, found in `patchwork/bin`, will now default to using `python` rather than `python2` for calling `manage.py`. This resolves an issue when Patchwork is deployed with a `virtualenv`.

### 18.2 v2.0.2

#### 18.2.1 Bug Fixes

- Resolve some issues caused by parallel parsing of series.
- Poorly formatted email headers are now handled correctly.
- Patches with CRLF newlines are now parsed correctly and these line endings are stripped when saving patches.
- Resolved some issues with pagination.
- Emails from `git-pull-request v2.14.3+` are now handled correctly.
- Token generation from the web UI is now disabled if the REST API is disabled. This was causing an exception.
- Non-breaking spaces in tags are now handled correctly.
- Patches with no space before the series marker, such as `PATCH1/8`, are now parsed correctly.

## 18.3 v2.0.1

### 18.3.1 Bug Fixes

- Handle requests for pages out of range.
- Fix SQL permissions scripts for tables and columns added in 2.0.
- Fix filtering of projects by name
- Fix “add to bundle” dropdown
- Performance improvements for the XML-RPC API

## 18.4 v2.0.0

### 18.4.1 Prelude

The v2.0.0 release includes many new features and bug fixes. For full information on the options available, you should look at the full release notes in detail. However, there are two key features that make v2.0.0 a worthwhile upgrade:

- A REST API is now provided, which will eventually replace the legacy XML-RPC API
- Patch series and series cover letters are now supported

For further information on these features and the other changes in this release, review the full release notes.

### 18.4.2 New Features

- REST API.

Previous versions of Patchwork provided an XML-RPC API. This was functional but there were a couple of issues around usability and general design. This API also provided basic versioning information but the existing clients, mostly *pwclient* variants, did not validate this version. Together, this left us with an API that needed work but no way to fix it without breaking every client out there.

Rather than breaking all those users, make a clean break and provide another API method. REST APIs are the API method de jour providing a number of advantages over XML-RPC APIs, thus, a REST API is chosen. The following resources are exposed over this new API:

- Bundles
- Checks
- Projects
- People
- Users
- Patches
- Series
- Cover letters

For information on the usage of the API, refer to the [documentation](#).

- Cover letters are now supported.

Cover letters are often sent in addition to a series of patches. They do not contain a diff and can generally be identified as number 0 of a series. For example:

```
[PATCH 0/3] A cover letter
```

Cover letters contain useful information that should not be discarded. Both cover letters and replies to these mails are now stored for use with series.

- Series are now supported.

Series are groups of patches sent as one bundle. For example:

```
[PATCH 0/3] A cover letter
 [PATCH 1/3] The first patch
 [PATCH 2/3] The second patch
 [PATCH 3/3] The third patch
```

While Patchwork already supports bundles, these must be created manually, defeating the purpose of using series in the first place. Series make use of the information provided in the emails themselves, avoiding this manual step. The series support implemented is basic and does not support versioning. This will be added in a future release.

- All comments now have a permalink which can be used to reference individual replies to patches and cover letters.
- Django Debug Toolbar is now enabled by default when using development settings.
- Django 1.9 and 1.10 are now supported.
- Python 3.5 is now supported.
- Docker support is now integrated for development usage. To use this, refer to the [documentation](#).
- Series markers are now parsed from patches generated by the [Mercurial Patchbomb](#) extension.

### 18.4.3 Upgrade Notes

- The REST API is enabled by default.

The REST API is enabled by default. It is possible to disable this API, though this functionality may be removed in a future release. Should you wish to disable this feature, configure the `ENABLE_REST_API` setting to `False`.

- The `parsemail.py` and `parsearchive.py` scripts have been replaced by the `parsemail` and `parsearchive` management commands. These can be called like any other management commands. For example:

```
$ ./manage.py parsemail [args...]
```

- The `DEFAULT_PATCHES_PER_PAGE` has been renamed as `DEFAULT_ITEMS_PER_PAGE` as it is now possible to list cover letters in addition to patches.
- The `context` field for patch checks must now be slug, or a string consisting of only ASCII letters, numbers, underscores or hyphens. While older, non-slugified strings won't cause issues, any scripts creating contexts must be updated where necessary.

### 18.4.4 Bug Fixes

- When downloading an mbox, a user's name will now be set to the name used in the last email received from them. Previously, the name used in the first email received from a user was used.
- *user at domain*-style email addresses, commonly found in Mailman archives, are now handled correctly.
- Unicode characters transmitted over the XML-RPC API are now handled correctly under Python 3
- The *pwclient* tool will no longer attempt to re-encode unicode to ascii bytes, which was a frequent cause of `UnicodeEncodeError` exceptions. Instead, a warning is produced if your environment is not configured for unicode.

### 18.4.5 Other Notes

- `reno` is now used for release note management.
- Patch diffs now download with a `diff` extension.



### 19.1 1.1.3

This release fixes a number of issues with the 1.1.2 release.

#### 19.1.1 Bug Fixes

- Some Python 3 issues are resolved in *pwclient*
- *pwclient* now functions as expected behind a proxy

### 19.2 1.1.2

This release fixed a number of issues with the 1.1.1 release.

#### 19.2.1 Bug Fixes

- Headers containing invalid characters or codings are now parsed correctly
- Patches can no longer be delegated to any user

This had significant performance impacts and has been reverted.

### 19.3 1.1.1

This release fixed a number of issues with the 1.1.0 release.

### 19.3.1 Bug Fixes

- Numerous issues in the *parsemail.py*, *parsearchive.py* and *parsemail.sh* scripts are resolved
- Permissions of database tables, as set by *grant-all* SQL scripts, are now set for tables added in Patchwork 1.1.0
- Some performance and usability regressions in the UI are resolved

## 19.4 1.1.0

This release focuses on usability and maintainability, and sets us up nicely for a v2.0.0 release in the near future. Feature highlights of v1.1.0 include:

- Automated delegation of patches, based on the files modified in said patches.
- Storing of test results, a.k.a. “checks”, on a patch-by-patch basis.
- Delegation of patches to any registered Patchwork user (previously one had to be a registered maintainer).
- Overhaul of the web UI, which is now based on Bootstrap.
- Python 3 support.

### 19.4.1 New Features

- The web UI is updated to reflect modern web standards. Bootstrap 3.x is used.
- Python 3.4 is now supported
- Checks, which can be used to report the status of tests, have been added
- Automatic delegation of patches based on file path
- Automated documentation for the XML-RPC API. This can be found at the `/xmlrpc` in most Patchwork deployments
- Vagrant is now integrated for use during development

### 19.4.2 Upgrade Notes

- Patches can now be delegated to any Patchwork user.

### 20.1 1.0.0

This release changes a few admin-visible components of Patchwork, so upgrading involves a few steps.

#### 20.1.1 New Features

- Patch tags are now supported  
Patch “tags”, such as *Acked-by*, *Reviewed-by*, are typically included in patches and replies. They provide important information as to the activity and “mergability” of a patch. These tags are now extracted from patches and included in the patch list.
- Django 1.7 and Django 1.8 are now supported
- tox support is integrated for use by developers

#### 20.1.2 Upgrade Notes

- Migrations are now executed using the Django migrations framework.  
Future database migrations will be implemented using Django Migrations, rather than raw SQL scripts. Before switching to Django migrations, first apply any unapplied migrations in the *lib/sql/migration* folder. For example, on postgres:

```
$ psql -f lib/sql/migration/015-add-patch-tags.sql patchwork
$ psql -f lib/sql/grant-all.postgres.sql patchwork
```

Once applied, configure the required Django Migration tables using the *migrate* management command:

```
$ ./manage.py migrate --fake-initial
```

- Moved Patchwork source from the *apps* directory to the top level directory.

Any scripts or tools that call Patchwork applications, such as *parsemail.sh*, must be updated to reference the new location of these scripts. To do this, simply remove *apps/* from the path, i.e. *apps/patchwork/* becomes *patchwork*.

- The *patchwork-cron.py* script has been replaced by the *cron* management command.

Any references to the former should be updated to the latter. The *cron* management command can be called like so:

```
$ ./manage.py cron
```

- The *settings.py* file has been updated to reflect modern Django practices.

You may need to manually migrate your existing configuration to the new settings file(s). By default, settings are read from *patchwork/settings/production.py*. To migrate, use the provided template:

```
$ cp patchwork/settings/production{.example,}.py
```

Merge your previous settings, usually located in *apps/local\_settings.py*, to this file.

In addition, any scripts that set the *DJANGO\_SETTINGS\_MODULE* environment variable will need to be updated to reflect the new location, typically:

```
DJANGO_SETTINGS_MODULE=patchwork.settings.production
```

- Django *staticfiles* is now used to gather static files for serving via a web server

Static content should now be located in the folder indicated by *STATIC\_ROOT*. This should point to somewhere sensible, such as the absolute path of *htdocs/static* in the Patchwork tree. Configure the *STATIC\_ROOT* setting in your settings file, then run the *collectstatic* management command:

```
$ ./manage.py collectstatic
```

Finally, update your webserver configuration to serve the static content from this new location. Refer to the sample web configuration files provided in *lib* for more information.

- Django 1.5 is no longer supported
- Python 2.5 support was broken and is officially no longer supported

### 20.1.3 Deprecation Notes

- Django 1.6 support will be removed in a future release
- Raw SQL migration scripts, currently found at *lib/sql/migration*, will no longer be updated and will be removed in a future release. The Django Migration framework, found in Django 1.7 and above, should be used instead.

## CHAPTER 21

---

### v0.9 Series (“Alpaca”)

---

This represents the state of the Patchwork code before adopting [semantic versioning](#), along with [fabric-inspired release names](#). For information on the features available in this release, refer to the [git logs](#).



## Symbols

-list-id <list-id>

manage.py-parseachive command line option, 30

manage.py-parsemail command line option, 30

## I

infile

manage.py-parseachive command line option, 30

manage.py-parsemail command line option, 30

## M

manage.py-parseachive command line option

-list-id <list-id>, 30

infile, 30

manage.py-parsemail command line option

-list-id <list-id>, 30

infile, 30

manage.py-rehash command line option

patch\_id, 30

manage.py-retag command line option

patch\_id, 30

## P

patch\_id

manage.py-rehash command line option, 30

manage.py-retag command line option, 30