Open source and support issues

Sebastian Rahtz

OSS Watch

What do we mean by support?

Support for users

Support for developers

Open source and support issues

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Outline

OSS Watch

What do we mean by support?

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Welcome

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Who is talking to you?

- Sebastian Rahtz
- Information Manager for *Oxford University Computing* Services
- Manager of JISC's *OSS Watch*, a UK national advisory service
- Board of Directors and Technical Council, the Text Encoding Initiative

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- The JISC (Joint Information Systems Committee) coordinates educational IT structures in the UK. Directly funded by the state at the same level as research councils.
- JISC runs the physical network for HE and FE, provides services, and funds applied research.
- OSS Watch is funded from 2003-2006 as a UK national Open Source Advisory Service.
- OSS Watch has 3.25 FTE based in Oxford University Computing Services' *Research Technologies* section.

OSS Watch provides unbiased advice and guidance about free and open source software for UK further and higher education. OSS Watch is not set up to be an advocacy group.

What does OSS Watch do?

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Briefing material	2-3 page guidance notes
Conferences	Twice yearly
Project support	Face to face discussion
Reports to JISC	JISC open source policy
Collaboration	Working with other groups
FE roadshows	Regular 1 day intros
Demonstration Software	Knoppix and Open CD
Survey	Autumn 2004, Autumn 2006
Website	(naturally)
Workshops	Focused small events
International conference	March 2006

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Look at the AGIMO report

Typical concerns about open source software..... 14
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The common perception about Open Source

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Ray Lane, former Oracle executive, cites six problems with open source:

- Informal support
- Velocity of change
- No roadmap
- Functional gaps
- Licensing caveats
- ISV endorsements

ZD Net March 2004

. . . in more detail

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"The free license for an open source package is just a fraction of the cost to deploy and maintain an application. The support infrastructure and assurance is less defined, and enterprises must proceed at their own risk. In many cases, an enterprise can rely on the open source community for more informal support, which won't be sufficient for mission-critical applications."

. . . are they *all* about support

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We can

- *Velocity of change:* who supports change?
- *No roadmap*: how do we plan support needs?
- *Functional gaps*: will we need support to plug them?
- *Licensing caveats*: does this impact on who can provide support?
- *ISV endorsements*: will anyone admit to being able to help us?

Support for users

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Breaking down ‘user support’

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Who will support our software?

- Who helps us install it?
- Who do we call when it dies?
- How do we fix misfeatures?
- Where do we get documentation?
- Who trains our staff?
- Who trains our users?

Not many of these come from the software supplier.

How do our costs break down?

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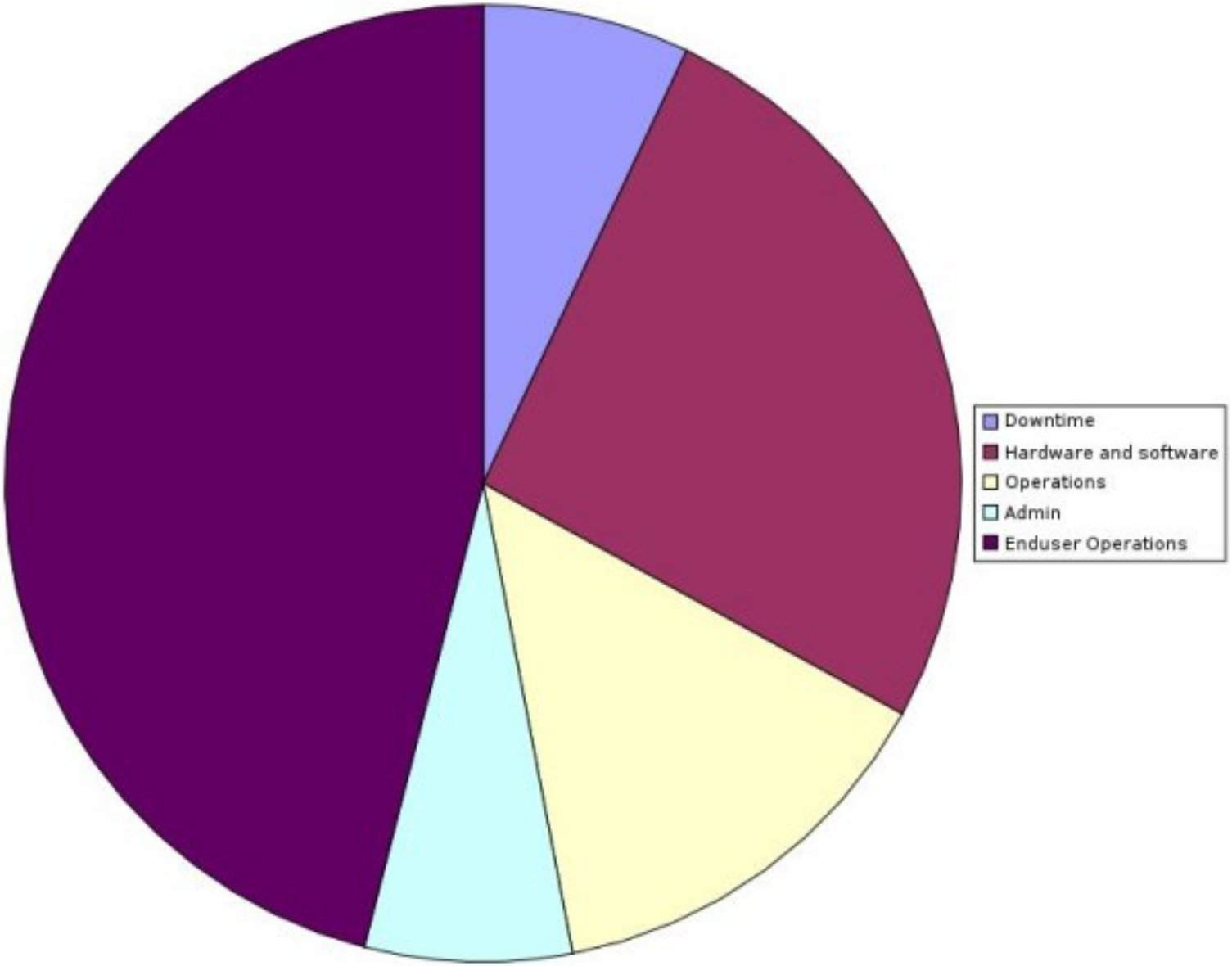

Support suppliers

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Ask yourself where you obtained *support* in each of these areas the last time you deployed a:

- Web server
- Student records system
- Desktop office suite
- VLE
- Email client
- Image editing program

Installation

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Web server	You followed online instructions
Student records system	The consultant or project team did it
Desktop office suite	It was already there with the OS
VLE	The supplier, consultant or project team did it
Email client	Your desktop support people did it
Image editing	You followed the instructions

Death

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Web server	You call the sysadmin
Student records system	You call the consultant
Desktop office suite	You shrug your shoulders, reboot, and pray
VLE	You call the consultant
Email client	You swear, reboot, and install an upgrade from the web
Image editing	You ring up and complain. You are told to wait for version 8.6

Fixes

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Web server	You are too scared to consider it
Student records system	You pay the consultant another £1 million
Desktop office suite	You can’t fix it
VLE	You call a meeting of the project team
Email client	You upgrade
Image editing	You wait for the next version

Documentation

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Web server	Buy an O'Reilly book
Student records system	There is no documentation
Desktop office suite	Buy a book in Borders
VLE	It's online in the system
Email client	Who needs documentation?
Image editing	You buy a book. You lent the manual to someone else

Training

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Web server	If the sysadmin doesn't understand it, send him on a course
Student records system	You paid through the nose for this already
Desktop office suite	Enroll people on the ECDL
VLE	Poke it and see
Email client	If they need training, they can't use email
Image editing	You have internal courses on this

User Help

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Web server	They don't know it exists
Student records system	The project team have a phone
Desktop office suite	Your help desk people do it every day
VLE	Ask on a forum
Email client	Your help desk does this 99% of the day
Image editing	They ask their geek friends

Which of those was open source?

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- Web server: Apache, open source
- Student records: Oracle, commercial
- Office suite: Microsoft, commercial
- VLE: Moodle, open source
- Email client: Outlook Express, commercial
- Image editing: Photoshop, commercial

If we replaced Microsoft Office with Open Office, Outlook with Mozilla Thunderbird, Photoshop with the GIMP, and Moodle with Blackboard, how much would change?

So what does the commercial licence buy you?

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- revenue to pay for development of new versions
- writing documentation
- direct support of user in niche markets
- advertising to make sure this product is widely used
- upholding the capitalist system by paying dividends on stock

Types of support

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- In-house understanding
- External companies
- Documentation
- Empowered peer group
- The software creator

In-house understanding

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Join a consortium

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Employ a specialist consultant

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Stick with your existing vendors

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Look at AGIMO again

Other sections in the report:

- Sourcing open source software
- Preparing a procurement plan
- Risk analysis and risk management
- Risk mitigation procedures
- Understanding the legal context
- Sharing OSS solutions

These are aspects of support too.

Key sources of support for *all* your software

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1. The person at the next desk
2. Your staff. You pay them to understand this stuff
3. The web. Self-help is the name of the game
4. The bookshop. Any software worth using has a shelf-full of books about it
5. Training courses. Lots of companies offer training
6. Consultants. Pay a man in a suit (or with a ponytail) to come in and fix things.
7. The people who wrote the software

Community is the key.

Icebergs

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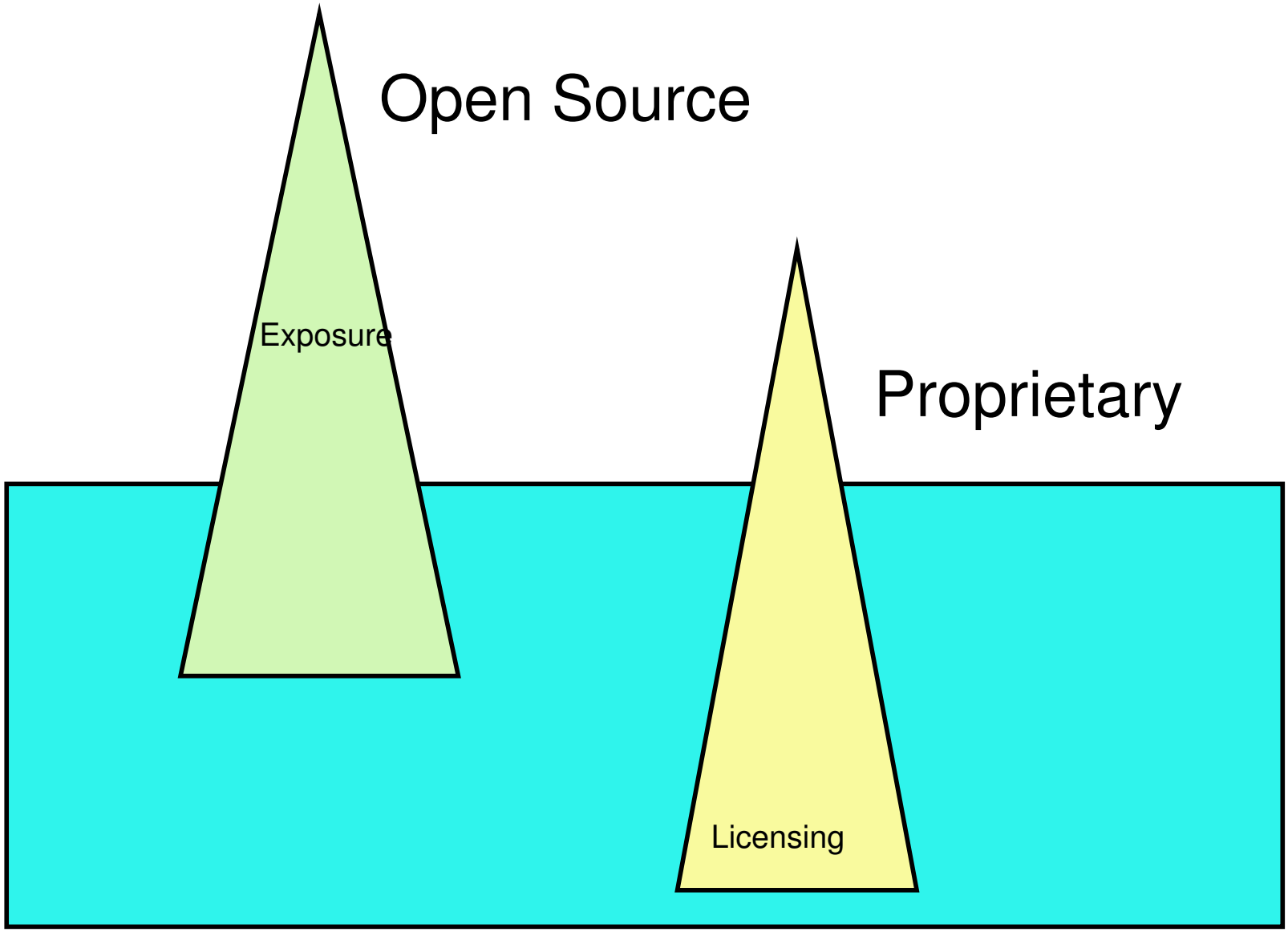

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Degrees of commitment

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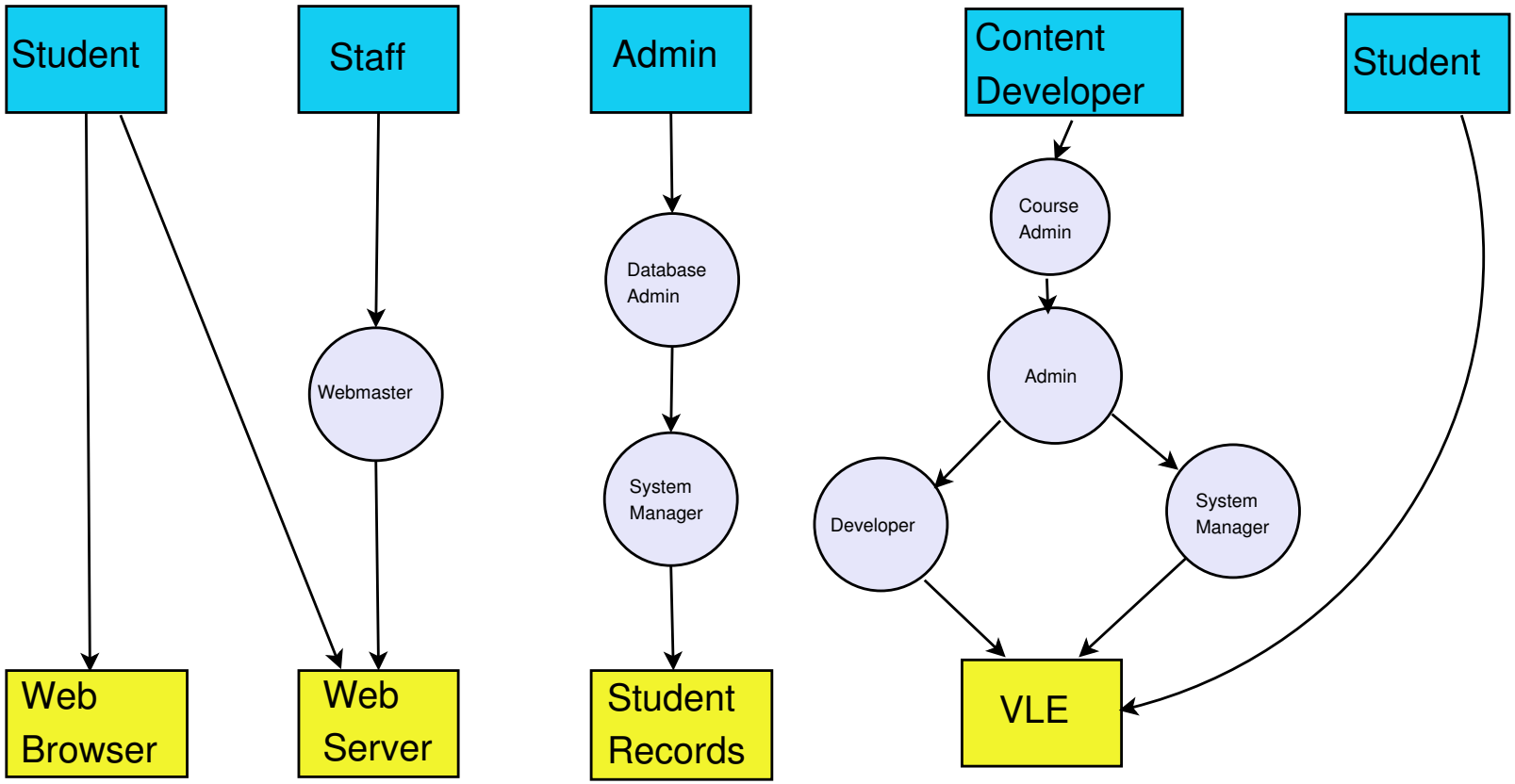

What sort of help?

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- Licenses
- Apprentices
- Leadership
- Support companies
- Documentation

It's about community again.

The legal and contractual situation in the UK

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- any act of creation generates copyright—it does not have to be claimed
- most academic contracts specify that all creations are property of the employer
- usually, there are specific exclusions for books and articles
- copyright in learning materials is usually claimed by the university
- the employee has a duty to assist the university in exploiting any created material
- software is hard (but not impossible) to patent

Difficulties arising

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- the university's exploitation system for software only knows about selling licences
- the university does not have a revenue-sharing arrangement for consultancy-based exploitation
- the lawyers are reluctant to sanction open source exploitation because they see it as liability without revenue
- if the university relinquishes copyright, it is at the risk of having to buy back a later release of the product

Examples of (e-learning) open source exploitation in academia

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uPortal	portal framework, development by top American universities (‘stone soup’ group) to meet their specific needs
Bodington	Small UK open source VLE, developed by Leeds, Oxford, UHI; community based on shared problems
Moodle	Simple but very effective VLE, distinguished by its exemplary open source community
LAMS	innovative e-learning mediating framework, new work being funded under an open source model

Policy proposals (1)

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The primary concerns for an educational institution's IT procurement strategy should be *demand* (that is to say, why do we need the system) and *value* (what will it cost us). Beyond that, the single most important consideration is the preservation of data and the interoperability of systems.

1. *New software acquisitions should demonstrate conformance to open standards and interoperability with open systems.*

Policy proposals (2)

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At each point on the procurement and deployment chain, software should be assessed on its merits.

2 *Open source and proprietary software options should be assessed using the same criteria, considering of total cost of ownership over the expected lifetime of the deployment.*

Policy proposals (3)

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An institutional IPR policy should acknowledge the significant role played by open source methodologies in terms of potential exploitation routes.

3. *Software development by staff and students must maintain a register of IPR.*
4. *Software for which the copyright belongs to the institution must be exploited.*
5. *Open source licensing must be available as an exploitation method, and will be the default method where no alternative is proposed.*
6. *Income derived from services and training associated with an open source product must be shared with the developers.*
7. *The open source licence chosen should ensure that the institution is able to freely use all future versions of the software.*

Policy proposals (4)

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There must be procedures in place so that staff can do work on open source projects in good conscience, without removing the protection afforded to the institution by retention of copyright.

8. *A register of offically-deployed open source software must be maintained for each unit.*
9. *A register of open source software for which staff may contribute code, documentation and support must be maintained for each unit. It must say whether contributions remain the property of the institution, or whether copyright has been assigned to a body maintaining the software.*
10. *Staff and students may deploy additional open source software for research or teaching, but may not contribute institutional intellectual property to it without explicit permission.*

The truth

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There is no silver bullet.

- support for open source is as variable as it is for proprietary software
- you'll pay for training whatever happens
- much depends on the existing knowledge of your staff and students
- all large software deployments need support
- the availability of source code sometimes makes it easier to shop around
- open source has support ranging from geek teenagers to IBM, *with a lot in between*