

# MON. 7/25 10:00AM — CS-SIS PROGRAM: HOT TOPIC: LIBRARIES DEVELOPING OPENLY

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## 2011 AALL ANNUAL MEETING AND CONFERENCE

Date/Time: Mon, Jul 25 10:00am - 10:30am

Location/Room: PCC-Room 102(A)

Libraries and open source communities share a lot of similarities, making it a logical decision for libraries to both use and participate in open source development. Nicole C. Engard, Director of Open Source Education at ByWater Solutions and author of Practical Open Source Software for Libraries, will explain how libraries can get involved in open source development and take advantage of the power of applications that have been developed by active communities.

Speaker(s):

Nicole C. Engard - ByWater Solutions

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Annual Meeting & Conference

★ July 23-26

Philadelphia★

# Libraries Developing Openly

Nicole C. Engard

Director of Open Source Education, ByWater Solutions

Author of *Practical Open Source Software for Libraries*

# Open Source Definition

Open source software is software that users have the ability to run, distribute, study and modify for any purpose.

Open source is a collaborative software-development method that harnesses the power of peer review and transparency of process to develop code that is freely accessible.<sup>1</sup>

Open source draws on an ecosystem of thousands of developers and customers all over the world to drive innovation.<sup>2</sup>

<sup>1,2</sup> <http://connect.educause.edu/display/47941>

# Four Freedoms of Free Software

- You need all four of these freedoms to have free software
  - Freedom of use
  - Freedom to copy
  - Freedom to modify
  - Freedom to contribute

<http://www.web2learning.net/archives/4263>

# Sharing of Ideas

"If you have an apple and I have an apple and we exchange apples, then you and I will still each have one apple. But if you have an idea and I have an idea and we exchange these ideas, then each of us will have two ideas."

Attributed to Bernard Shaw

<http://ftacademy.org/materials/fsm/1#1>



# Open Source Community

- Open source is about more than free software
- Community is crucial to the growth of open source
- Without shared knowledge and collaboration the project will not grow
- People who use open source can collaborate and contribute in many ways with the community
  - Write code
  - Write documentation
  - Debug
  - Educate others

# Libraries & Open Source

- Libraries and Open Source Both...
- Believe that information should be freely accessible to everyone
- Give away stuff
- Benefit from the generosity of others
- Are about communities
- Make the world a better place

-- Horton, G. <http://tinyurl.com/3jvumn>



# Libraries & Open Source

Libraries and Open Source make the  
perfect pair

[Librarians] "are almost ethically  
required to use and develop open source  
software."

Crawford, R. S. <http://www.lugod.org/presentations/oss4lib.pdf>

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# What I Learned

# Start Openly!

- Create solutions for your library in the open from the start
- It's easier to open source a project if that was the plan all along
- Even though our firms might be competitors, we (the librarians) are not!

# For the Love of Open Source

The best person to do a job is the one who most wants to do that job; and the best people to evaluate their performance are their friends and peers who, by the way, will enthusiastically pitch in to improve the final product, simply for the sheer pleasure of helping one another and creating something beautiful from which they all will benefit.

Howe, J. (2008). *Crowdsourcing: Why the power of the crowd is driving the future of business*. New York: Crown Business. p.8

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How do we do it?

# Be Honest

In a world where people are constantly exchanging ideas, evaluating concepts, and suggesting enhancements, it is vitally important that everyone speak the truth as he sees it. If someone fails to speak the truth, the process of creating software will be greatly impaired.

Pavlicek, Russell. Embracing insanity : open source software development. Indianapolis IN: SAMS, 2000.

# Be Transparent

Make sure that everything you do and say is out in the open so that everyone can benefit from your opinion, experiences and skills. If you're communicating about the project, log the discussion for those who aren't online. If you're writing code, make sure it's submitted to the public repository or logged in a shared database of current projects so that work isn't being doubled, and if you teach someone something new document it and share it with others so they too can learn down the road.

Engard, Nicole C. Practical Open Source Software for Libraries. Chandos Publishing, 2010. <http://opensource.web2learning.net>.

# Be Respectful

Critiquing the community is a right reserved for those who have proved themselves by making valuable contributions

Tapscott, Don, and Anthony D. Williams. "Embracing open source culture and strategy." In *Wikinomics: How mass collaboration changes everything*, 82-83. Expanded Edition. New York, NY: Penguin USA, 2008. [www.wikinomics.com/book/](http://www.wikinomics.com/book/).



# Be A Mentor

[W]e all learn differently. You might want to settle in with a programming book, while I prefer to take an in-person class. If your project wants to attract new contributors, it behooves you to think past the "dive into the deep end" culture

Schindler, Esther. "Mentoring in Open Source Communities: What Works? What Doesn't?." ITworld, September 20, 2009. <http://bit.ly/9ppL3O>.

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# Success Stories

# Blacklight

- Open source discovery layer developed by staff at the University of Virginia Library
- Designed to replace old fashioned, difficult to use, OPACs
- “Blacklight can ultimately be successful and sustainable in the long run only if it is an open project; that is, it takes contributions from a community of developers across many institutions to enhance and support it”

<http://projectblacklight.org>

# Koha

- A fully-functional open source integrated library system (<http://koha-community.org>)
- Developed 11 years ago by the Horowhenua Library Trust in New Zealand
- “An open source project is never finished. Someone will always see something else to improve and we were counting on this. We wanted to encourage a supportive community around Koha right from the start.”<sup>1</sup>

<sup>1</sup>I.Ransom, Joann, Chris Cormack, and Rosalie Blake. “How Hard Can It Be?: Developing in Open Source.” The Code4Lib Journal, no. 7 (June 26, 2009).  
<http://journal.code4lib.org/articles/1638>.

# Evergreen

- A fully-functional open source integrated library system (<http://open-ils.org>)
- Developed by the Georgia Pines Library System in 2006
- “[T]he Evergreen community is also marked by a high degree of participation by the librarians who use the software and contribute documentation, bug reports, and organizational energy. As such, Evergreen is very much about both the developers **\*and\*** the users.”



**Libki**  
Kiosk Management System



*LibX*



**UCR** | UC Riverside Libraries  
iVia Project

# So Many More!!



*kete*

**MarcXimiL**

**LibraryH3lp**

**greenstone digital  
library software**

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Keep Learning

# Open Source & Libraries

- Open Source Software in Libraries  
[infomotions.com/musings/ossnlibraries/](http://infomotions.com/musings/ossnlibraries/)
- Open Source Software and Libraries Bibliography  
[zotero.org/groups/freelibre\\_and\\_open\\_source\\_software\\_and\\_libraries\\_bibliography](http://zotero.org/groups/freelibre_and_open_source_software_and_libraries_bibliography)
- Practical Open Source Software for Libraries  
[opensource.web2learning.net/blog](http://opensource.web2learning.net/blog)
- Nicole's Open Source Links  
[www.delicious.com/nengard/opensource](http://www.delicious.com/nengard/opensource)



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# Thank You

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Slides: [opensource.web2learning.net](http://opensource.web2learning.net) > Presentations