TECHNICAL SUPPORT FOR OPEN SOURCE ILS

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AGENDA

- Introduction to the concepts
  - Open Source Software
  - ILS

- Channels of technical support for 5 different OSS ILS
  - Koha
  - Evergreen
  - Emilda
  - New Gen Lib
  - Obiblio
Open Source Software

What is it?
Open Source Software

Definition

“Open source is a development method for software that harnesses the power of distributed peer review and transparency of process. The promise of open source is better quality, higher reliability, more flexibility, lower cost, and an end to predatory vendor lock-in.”

http://www.opensource.org/
Open Source Software

- In the phrase open source, source refers to source code, the human-readable computer code which is the origin, or source, of the computer application. Open refers to the terms of access to that computer source code. So open source software is software for which the source code is freely available.

- Examples???
The Cathedral and the Bazaar

http://www.catb.org/~esr/writings/cathedral-bazaar/cathedral-bazaar/

- Eric Raymond
- Different open source models

- Cathedral
  - Code developed between releases by exclusive set of developers
- Bazaar
  - Code developed openly in public view
  - Introduced by Linux and Linus Torvalds
RAYMOND’S PRINCIPLES

1. Every good work of software starts by scratching a developer's personal itch.
2. Good programmers know what to write. Great ones know what to rewrite (and reuse).
3. Treating your users as co-developers is your least-hassle route to rapid code improvement and effective debugging.
5. Given enough eyeballs, all bugs are shallow.
6. If you treat your beta-testers as if they're your most valuable resource, they will respond by becoming your most valuable resource.
7. The next best thing to having good ideas is recognizing good ideas from your users. Sometimes the latter is better.
OSS Examples

- Linux
- Apache
- Wikipedia
- PBWiki
- Mozilla Foundation (Firefox, Thunderbird)
- Moodle
- Drupal
- Evergreen
- Koha
- D-Space

- OpenOffice
- Chrome
- OpenSSH
- TomCat
- Eprints
- Many – Many more
Open Source Software

- **Open source software** (OSS) is defined as computer software for which the source code and certain other rights normally reserved for copyright holders are provided under a software license that meets the Open Source Definition or that is in the public domain.

- This permits users to use, change, and improve the software, and to redistribute it in modified or unmodified forms. It is very often developed in a public, collaborative manner.

- Open source software is the most prominent example of open source development and often compared to user-generated content.

- The term open source software originated as part of a marketing campaign for free software. A report by Standish Group states that adoption of open source software models has resulted in savings of about $60 billion per year to consumers.

OSS - LICENSES

- A license defines the rights and obligations that a licensor grants to a licensee. Open Source licenses grant licensees the right to copy, modify and redistribute source code (or content). These licenses may also impose obligations (e.g., modifications to the code that are distributed must be made available in source code form, an author attribution must be placed in a program/documentation using that Open Source, etc.).

- Many
  - http://www.opensource.org/licenses/alphabetical
OSS – Resources

- Fall 2008 issue of Library Technology Reports

- List of OSS products
  - A discussion on OSS – ILS
    - [https://wiki.minitex.umn.edu/OpenSourceILSDiscussion](https://wiki.minitex.umn.edu/OpenSourceILSDiscussion)
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OPEN SOURCE SOFTWARE

Advantages/ disadvantages
OSS - Advantages

• The availability of the source code and the right to modify it is very important.

• The right to redistribute modifications and improvements to the code, and to reuse other open source code, permits all the advantages due to the modifiability of the software to be shared by large communities.

• The right to use the software in any way.

• When no one holds exclusive rights on a given code (sometimes mentioned as “life or death rights”), several traditional problems of the proprietary software model can be overcome:
OSS - Advantages

Problems with proprietary software:

- There is no one with the power to restrict in a unilateral way how the software is used, even in a retroactive way.

- There is no single entity on which the future of the software depends.

- No "black boxes" are possible. This point is so important that open source is now considered by many experts as one of the necessary conditions for dependable applications.
OSS - Advantages

- There is always the possibility of "forking", or creating an alternative code base if the current one is in some way perceived as wrongly managed.
- No per-copy fees can be asked for modified versions, and anyone can use the current code base to start new projects.
- There are fewer conflicting priorities due to marketing pressures. Usually open source software is delivered "when it is ready", and when the development team feels that its quality is good enough. This means that software usually does not need as many "service packs", updates and such, reducing the maintenance cost.
OSS - Advantages

- It provides a new forum for democratic action.
- Reduced dependence on software vendors
- Existing support networks
- Large and enthusiastic user base
OSS Disadvantages

- Support issues - Informal and unaccountable support channels
- New features added constantly – creating confusion
- Quality Control Issues
- Usually not very user-friendly – though that is changing
- Limited or no accountability - Projects can die
- Initial installation costs / Maintenance Costs
- In-House technical skills requirement
- It is sometimes difficult to know that a project exist, and its current status
OSS FOR LIBRARIES

Why do we care?
OPEN SOURCE AND LIBRARIES

This is a time of major transformation in the library automation industry, and the open source software movement has found fertile ground among libraries. Many libraries are moving away from proprietary integrated library systems in favor of open source software. The dynamics of the industry have changed dramatically in recent years—until recently, libraries had largely acquired proprietary automation systems from a clique of specialized vendors following the traditional software licensing models. The open source movement has disrupted long established patterns, introducing a new way of thinking about the development and distribution of software, new products, and a new set of companies seeking to compete against the status quo.
Integrated Library Systems

*ILS in a Nutshell*

The Integrated Library System, or ILS, provides computer automation for all aspects of the operation of a library.

Almost all libraries in the developed world make use of an ILS. In the United States, only very small public or academic libraries, often in rural communities, operate without them.

These products are generally organized into modules that address specific functional areas. Standard modules include cataloging for creating bibliographic records that represent works in the library's collection, circulation that automates tasks related to loaning items to patrons, serials control for managing periodicals and serials, acquisitions to handle the procurement process for new items added to the collection, and the online public access catalog to allow library users to search or browse through the collection. Each of these modules offers a very library's detailed suite of features to accommodate the complex and nuanced routines involved in the library work.
**ILS Examples**

- Symphony from SirsiDynix,
- Millennium from Innovative Interfaces,
- Aleph from Ex Libris Group,
- Voyager from Ex Libris Group,
- Polaris from Polaris Library Systems,
- Library.Solution from The Library Corporation,
- Carl.X from The Library Corporation,
- Spydus from Civica,
OSS – ILS Examples
OSS- ILS

1. Koha
2. Evergreen
3. NewGenLib
4. Obiblio
5. Emilda
Main Concern of Librarians with OSS

Lack of technical support!
DEBUNKING THE MYTH

- Multiple types and channels of technical support available

Commercial Technical Support
- You pay for what you want:
  - Installation
  - Regular Maintenance
  - Sporadic Maintenance
  - Training your own staff
DEBUNKING THE MYTH

Multiple types and channels of technical support available

Free Support :
- Online Forums, mailing lists, documentation, tutorials, etc.
- You can just be a passive receiver or
- You can participate and contribute to the process

OSS has very active communities and sometimes there support is much quicker and better than proprietary support process.
# Debunking the Myth

## Technical Support Channels for 5 OSS-ILS

<table>
<thead>
<tr>
<th>OSS-ILS</th>
<th>Koha</th>
<th>Evergreen</th>
<th>NewGenLib</th>
<th>Obiblio</th>
<th>Emilda</th>
</tr>
</thead>
<tbody>
<tr>
<td># Of Channels</td>
<td>11</td>
<td>11</td>
<td>5</td>
<td>9</td>
<td>6</td>
</tr>
</tbody>
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KOHA
KOHA

- Small to mid sized public, academic libraries, museums
- First OSS ILS – 1999
- Public Library in Athens County in Ohio
- Initial steep curve – in-house development of SW
- Serving a very large population
- Underlying Components– Linux, Apache, MySQL, Perl (LAMP)
KOHTECH SUPPORT CHANNELS

1. Koha Main Page
   - http://koha.org/

2. Koha Software Community Website
   - http://koha-community.org/

3. Koha Manuals
   - http://koha-community.org/documentation/

4. Wiki
   - http://wiki.koha-community.org/wiki/Main_Page
Koha Tech Support Channels

1. Koha Discussion Mailing List (General Support)
   • http://lists.katipo.co.nz/mailman/listinfo/koha
2. Koha Consortium List
   • http://lists.incolsa.net/mailman/listinfo/koha-consort
3. Koha Development Lists
   • http://lists.koha-community.org/cgi-bin/mailman/listinfo
4. IRC Channel #koha on irc.katipo.co.nz. Logged at http://stats.workbuffer.org/irclog/koha/
5. Koha Bugzilla
6. Vimeo Channel
7. YouTube Channel
Mailing Lists

The Koha community offers mailing lists for both general and specialized discussions; for techies and non-techies alike!

**General Koha Mailing List**

The general Koha mailing list is the best way to get in contact with the Koha community. It is the best place to introduce yourself to the project and seek assistance from other users.

It is ideal for ‘non techies’ looking for some quick advice or wanting to share experiences.

Join the mailing list.

**Specialized Lists**

Looking for something more specific? There are several other more specialized Koha mailing lists which you’re welcome to join.

Koha Developers List
- @Koha Developers List for people working on Koha. If you are a developer then you will probably want to subscribe to the CVS and bugs feeds as well.

Koha Consortia List
- @Koha for Consortia List. Consortia discussion regarding KOHA ILS.

Win 32 List: for Windows Users
- @Win 32 List for people wanting to install Koha on Windows

French List
- @French-language list & site for people who speak French

German List
- @German-internationalization language list for people who speak German and want to work on Koha’s German support

Spanish List
- @Spanish-language list for people who speak Spanish

Most of the specialized lists are hosted by Libre. Check out the full list on Koha's project pages.

Suggest a List?

If anyone else is running a Koha list and would like it added to the list above, please join and send a note to the Koha Developer’s List above.
EVERGREEN

- Consortia of public libraries, individual libraries, moving towards academic libraries
- Started in 2004
- Over 270 library facilities
- Catered towards larger consortium
- Underlying Components - PostgreSQL, Apache, Perl
- Equinox is the company that promotes, develops and supports Evergreen
EVERGREEN – TECH SUPPORT CHANNELS

1. Ever Green Main Page
   • http://www.open-ils.org/

2. General Discussion Mailing List
   • http://libmail.georgialibraries.org/mailman/listinfo/open-ils-general

3. Documentation Mailing List
   • http://libmail.georgialibraries.org/mailman/listinfo/open-ils-documentation

4. Development / Technical Discussion List
   • http://libmail.georgialibraries.org/mailman/listinfo/open-ils-dev

5. Evergreen SVN Commit List
   • http://list.georgialibraries.org/mailman/listinfo/open-ils-commits

6. Evergreen Documentation Interest Group
   • http://evergreen-ils.org/dokuwiki/doku.php?id=evergreen-docs:dig
EVERGREEN TECH SUPPORT CHANNELS

7. Wiki

8. Development Roadmap

9. IRC Channel #Evergreen on irc.freenode.net
   Web Gateway
   • [http://webchat.freenode.net/?channels=evergreen](http://webchat.freenode.net/?channels=evergreen)

10. IRC Logs

11. Documentation
Emilda - Tech Support Channels

1. Emilda Source Forge Page

2. Emilda Users Mailing List

3. Emilda Developers Mailing List

4. Emilda Announcement List

5. Emilda Translators Lista

6. Home Page
   • [http://www.emilda.org/](http://www.emilda.org/)
NEWGENLIB

- Developing / Non-western countries
- OSS very popular in these countries
- Versus Solutions released ILS in India – 2008
- Lot of development efforts / large number of people involved in OSS development / adoption
- Underlying Components - PostgreSQL, Apache, Linux
- Delhi Public Library – 56 branches and 1.4 million items uses KOHA
NEW GEN LIB - TECH SUPPORT CHANNELS

1. Home Page
   • http://www.verussolutions.biz/download.php

2. Discussion and Support Forum
   • http://newgenlib.2944635.n2.nabble.com/

3. FAQ & Wiki
   • http://newgenlib.wikispaces.com/Frequently+Ask+Questions

4. Documentation
   • http://www.verussolutions.biz/documentation.php

5. Social Networking Page
   • http://newgenlib.spruz.com/
Obiblio - Tech Support Channels

1. Home Page & Wiki
   • http://obiblio.sourceforge.net/

2. Documentation
   • http://obiblio.sourceforge.net/index.php/Main/Documentation

3. Support Forums
   • http://sourceforge.net/projects/obiblio/forums

4. Issue Tracker
   • http://bitbucket.org/mstetson/obiblio/issues/

5. Bitbucket Site
Obiblio - Tech Support Channels

6. Development Forum
   • http://sourceforge.net/projects/obiblio/forums/forum/1085302

7. Sourceforge Site
   • http://sourceforge.net/projects/obiblio/

8. News Mailing List
   • https://lists.sourceforge.net/lists/listinfo/obiblio-news

9. Help Forum on Source Forge
   • http://sourceforge.net/projects/obiblio/forums/forum/164978
PLANNING FOR OSS ILS IN YOUR LIBRARY

- Conversion Services
  - Data needs to be prepared and loaded into new ILS

- Installation
  - Comprises of downloading, compiling software and all its pre-requisites

- Configuration
  - Customization to the local parameters

- Training
  - Staff members need to be trained for new software
Planning for OSS in your Library

- **Ongoing Support**
  - Ensure reliability of the software with in-house technical support

- **Hosting**
  - Decision to be made by the library
  - Software as a Service (SaaS) or in-house

- **Custom Development**
  - Special requirement of library can be implemented

- **Calculate total cost of ownership**
  - Adding all the costs from above
MY PROJECT

- OSS – ILS IMLS Project
  www.oss-research.com

Interested Participants please email me at
vandana@utk.edu
THANK YOU!!!!