

Meeting Report: Getting the source out of the bottle: Practical implementation of open-source applications in the information sector

London, SOAS, Wednesday 16th June 2010

Judith Hegenbarth reviews this one-day event reviewing use of open-source software in information environments

This engaging and stimulating seminar began with a welcome from Tracy Kent, vice-chair of UKeIG, who had organised the day and arranged an impressive array of speakers. Martin White (chair of UKeIG) explained the outline of the day, with the first presentation an excellent scene-setting from Ken Chad (Ken Chad Consulting Ltd).

Ken spoke about the principles of open source being 'free', as really meaning 'freedom' to run, modify and redistribute software (not necessarily free in the economic sense). Many open-source software specialists work according to values that dictate openness and community. However, this is not to say that business will no longer benefit from this new approach; the new business model means that revenues come from supporting the software instead of developing it – our current economic climate suggests that this will become a more serious prospect.

The benefits of open source will mean that innovation is distributed; expertise from many areas can be drafted in. As more organisations and individuals become involved in development, the better products should become. Ken touched on the issue of copyright and open source, but suggested that often, technology drives legal change – open source could bring about one of those paradigm shifts that forces such transformation. Open- source licensing is very different to the spirit of copyright: it denies the right of anyone to exploit a work exclusively.

Ken called on the audience to embrace open source, citing bug fixing, security, customisation, translation, avoidance of vendor lock-in, mitigation of vendor/product collapse and establishment of community as important benefits. Some of the barriers he acknowledged are emotional; established hierarchical organisations in particular fear the unfamiliar and worry that open source will be unreliable and unknowable. Advocates are needed to demonstrate how successful implementation can be. He left the audience with encouragement to 'do it, its normal!'.

Matthew Hale from The King's Fund moved the seminar from discussion of the philosophical to the practical as he described the adoption of open-source software within his library. It began with developing innovations such as aggregated news and an enquiry database, in response to the need to make services as outward facing as possible, and allowed staff to work more flexibly. After this the decision to adopt Koha (originally developed in New Zealand) as a new library management system was launched. The system integrated well into existing services and allowed results to be exported onto the corporate website; users searching the site in general would garner results from the catalogue as well. Support from staff at PTFS Europe (some of whom were involved in the installation of their first proprietary LMS) was essential. Incredibly, only two months elapsed between the initial project meeting and the launch of the live system. The King's Fund experience is proof that open-source implementation can really work in a library management setting. Senior managers in the organisation are now looking at open-source solutions as truly viable.

Mark Hughes from the University of Swansea spoke about his own experience with open source, in his case for resource discovery. A local higher education partnership of three institutions had spawned a project to undertake federated searching of their catalogues and electronic resources. Mark's project team used VuFind open-source software and created a full 'next generation' interface for end users that pulls resources together. Advanced searching is also available for users with more sophisticated needs. VuFind was chosen over proprietary software on the grounds of cost, timescale, flexibility and stability. The resulting service can be viewed at <http://ifind.swwhep.ac.uk>. Users are able to add their own tags and comments to provide a value-added service. Users are also able to apply a significant level of customisation.

Mark reported on the benefits of implementation but admitted that it wasn't immune from commonplace issues such as a change in project team personnel. Inherited problems such as differences in cataloguing standards also proved problematic: two project partners use different classification systems, and this is difficult to reconcile. One of the partners also had a firewall issue, which has made progress slow. However, the community of users of VuFind has made it easier to find solutions. The risks of open-source software are different to those of proprietary software. So too is the cost model; while the capital outlay on the system is less, the staff costs of implementation and development are higher. More information can be found at: <http://swwhepsrch.blogspot.com>.

Michael Upshall, UKeig's very own website manager outlined how the group have used Drupal to redevelop the group's website. The software is cheap, easy to use, modular and has no vendor lock-in. It is used by other similar groups, and has a large user community of expertise to tap into. Negative aspects have included an increase of security attacks and the complexity of the modular system. With the benefit of experience, Michael recommended that open-source websites shouldn't be too heavily customised as users can become locked-in by one developer. He also suggested using widely used themes (colour schemes etc) and

separating development from maintenance, as some developers see maintenance as less exciting (although it is essential).

Phil Bradley, introduced as everyman's 'Internet guru', challenged the audience to improve their online presence. He spoke about the demise of Web 1.0 and showed via his own Web presence www.netvibes.com/philbradley how resources can be brought together in one place. In his case, walls can be used for communication and resources can be collected and organised. On discussing those who feel unable to engage with Web developments, Phil suggested that it is common to continue to understand the Internet as it was when you first discovered it; if you don't get time to keep up to date, you will flounder. In these Web 2.0 enabled times, news is generated by individuals using Twitter, not necessarily by traditional organisations. Proliferation of information sources means that we need to be 'cybernomadic' and cover as many bases as possible. Phil urged the audience to check how much 'real estate' on Google they own, to discover how many sources they are using and that all these are linked. Issues of ownership, reliability and control are complex and the law struggles to keep pace with Web 2.0. Most importantly, Phil emphasised that we shouldn't get too hung up on tools – we should decide what we wish to do, and then use the appropriate tools to achieve it.

At the end of the session, each of the speakers was asked to suggest what each participant could do within the following week. The suggestions were:

- Do just one thing (e.g. explore a resource like NetVibes)
- Update your blog
- Think how you can make cultural change
- Invest in an open-source Library Management System
- Dump a preconception/sacred cow
- Take your procurement manager out to lunch

The panel also provided some valuable summaries:

- It is important to share ideas, not necessarily systems
- Open source and Web 2.0 are states of mind – this is the hardest thing to change
- We deal with risk all the time.
- Organisational culture could stop us doing great things with open source
- Protecting reputation is important to organisations and creates a fear factor – we have to use advocacy rather than heavy handed tactics to change minds.

- We have to be pragmatic at times, since the world often resists change
- We have to look at the risk of using open source against the risk of not using it.

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