

# Bringing the Enterprise into the Open Source World

How we did it...

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## An Introduction



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### Work:

- Principal Engineer
  - Design and implement on/off-prem clouds
  - Grew up in Internet space
- Open Source advocate
  - Founding member of our OSS program
  - We'll talk all about this

### Play:

- Apache Software Foundation
  - VP Fundraising, member, httpd PMC
- Adjunct instructor
  - Open Source Software Development (University of MO – St. Louis)
  - Software Development (Washington University)

# Some History

# We've been around a while



1966



1969



1979



1990



1997



2016

- Founded by member banks as a cooperative
- Organic growth
- Public company on NYSE (MA) in 2006

## Related OSS history



1978



1983



1989



1994\*



1998



2000

- OSS was being born in the 70's
- X window and its business focus
- Foundations helped change the game

“Real enterprises do not  
“We <3 Open Source!”  
use open source software.”

# How We Did It

## Become the Champion(s)



- Prepare for the long haul
  - You own responsibility
  - Do you <3 OSS enough?
- Know your stuff
  - Licenses, intellectual property, legal, copyright, etc
  - Company processes
- Identify barriers and define success
  - Get ready for the barriers
  - Be prepared to track progress



Pro tip: There can be more than one champion



## Form a Team of Stakeholders

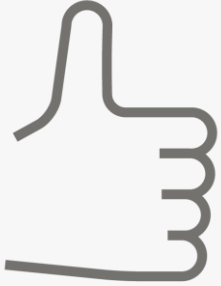


- Establish the bootstrap team
  - You may need to educate team members
  
- “You have two ears and one mouth”
  - The team should be experts of their domain
  
- Our bootstrap team:
  - Development & Operations
  - Information Security
  - Legal
  - Intellectual Property



Pro tip: Get an Executive sponsor

## Articulate WHY



- You must be able to answer, “Why are we doing this?”
  - There IS a benefit to your company, so explain it
  - This is not everyone’s day job, so be patient
- Some starting points
  - “We don’t want to maintain patches and custom builds”
  - “Do well by doing good”
  - “Give our company a seat at the global table”
  - “This drives technologists to us and enhances our careers”
  - “It’s FREE!”
- The whole team should be able to do this



Pro tip: Check your corporate objectives. I bet they can help!

## Establish The Process™



- Figure out how to collaborate
  - How will the core team work?
  - This is OSS, so be transparent
  
- Define how people engage and work
  - Balance stakeholder and contributor needs
  - Be concerned about Internal  $\leftrightarrow$  External, too
  - Education and understanding is a top goal
  
- **VERY IMPORTANT** in most enterprises
  - There must be a process
  - Be thorough in putting this together



Pro tip: Make the process as easy as possible

## Pick a LICENSE.txt



- This saves big headaches
  - Suggest a license so people have a starting point
  - Choose a well-known license
- This is important
  - LICENSE establishes copyright and legal use of the code
- To CLA or not to CLA
  - CLA = Contributor License Agreement
- We chose Apache License v2



Pro tip: Start with one of the top five

## Document and Socialize



- Documentation (everyone's favorite part)
  - Important for scale
- Minimal docs:
  - What is Open Source
  - Why are we doing this?
  - The Process™
  - Who to talk to for help
- Good doco helps sell the program
  - Accidental communities may form



Pro tip: Take the show on the road and involve your exec. sponsor

## Keep it Going



- Assumption:
  - You successfully bootstrapped the program
  
- Enter maintenance mode
  - Grow the program
  - Check in with stakeholders and exec. sponsor
  - Track and report
  
- Look at the core team again
  - We chose to add several evangelists at this point
  - Helps spread the load and shows the program is here to stay



Pro tip: Find some evangelists

# Potential Gotchas

## The License Will Be Questioned

- Probably not a big deal
  - Experience: “Why X instead of Y?”
  
- Articulate your reasons for choosing the license
  - Be flexible since no license is a perfect fit all the time
  - Brace the team for this, too
  
- Do be worried about copyright
  - Side note: It’s hard to lose copyright
  
- Defense: Know your stuff



Pro tip: Involve your team for their input



## Errors Will Be Made

- Prepare an action plan for these scenarios:
  - Stuff that *probably* shouldn't be public made it out there
  - We committed something \*sensitive\*
  - We committed something \*private\*
  
- When it happens, handle it promptly
  - You and the core team are accountable
  
- Defense: judicious use of delegation
  - You can only own so much
  - Expect common sense from your customers



Pro tip: Remember that distributed version control has history!

## “Who is THAT?”

- There may be non-company addresses in SCM history
- Community contributions
  - This is normal
- We permit personal accounts in our repos
  - This is unique
  - We keep an inside → outside the firewall translation
  - Self service



Pro tip: Maintain an audit trail

## Business vs Personal

- As the program grows/grew, were your assumptions right?
- Identity specifically
  - Inside the firewall vs outside
- Be concerned with protections
  - You as a company
  - Your people as users/contributors
  - The projects as consumers



Pro tip: Remember the labor laws!

# Wrap it Up

## Handy links and notes

- People who do this for a living:  
<https://todogroup.org>
- License compatibility matrices:  
[https://en.wikipedia.org/wiki/License\\_compatibility](https://en.wikipedia.org/wiki/License_compatibility)
- Some good notes about choosing a license:  
<https://opensource.guide/legal/>
- Trademarks and OSS? Yes, please!  
<http://fossmarks.org/>
- Apache Software Foundation resolved legal questions  
<https://www.apache.org/legal/resolved.html>
- Dept of Defense FAQ on OSS\*  
<https://dodcio.defense.gov/Open-Source-Software-FAQ/>
- Teach a class on this stuff  
<https://github.com/druggeri/OSSClass>
- THIS presentation:  
<https://people.apache.org/~druggeri/presentations/>