

Choosing Open Source Software

Developed Mark Surman and Jason Diceman,
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Workshop presented by: <add name>

Choosing software

- Picking the right software can be a difficult process – open source or not
- The best way to ensure you get good software is with a thorough review
- We will present simple ‘3 Step Method’ for open source software review

Step #1 - Identify needs

- **Organizational needs** – What problem are you trying to solve?
- **User needs** – What do individual users need to be able to do with the software?
- **Features** – What are the actual features that must be provided by the software? How important are each of these features?
- **Language** – What languages does the software need to accommodate?

Step #1 - Identify needs

Software Needs Worksheet		
Organization name	<<NAME OF ORGANIZATION>>	
Contact person	<<PERSON RESPONSIBLE FOR SOFTWARE REVIEW PROCESS>>	
Organizational needs	<<WHAT ARE THE PROBLEMS THAT THE SOFTWARE NEEDS TO SOLVE? WHY IS THE ORGANIZATION LOOKING FOR NEW SOFTWARE?>>	
User needs	<<WHAT DO INDIVIDUAL USERS NEED TO BE ABLE TO DO WITH THE SOFTWARE? ARE THERE PARTICULAR THINGS THEY HAVE ALREADY ASKED FOR?>>	
Language	<<WHAT LANGUAGES DOES THE SOFTWARE NEED TO ACCOMMODATE?>>	
Feature	Description	Priority
<<NAME OF FEATURE>>	<<BRIEF DESCRIPTION OF WHAT THE FEATURE MUST DO AND WHY IT IS NEEDED. ADD MORE ROWS IF NEEDED.>>	<<MUST HAVE, SHOULD HAVE, NICE TO HAVE>>

Step #1 ... and constraints

- **Budget** – How much do you have to spend?
- **Timeframe** – How quickly do you need to implement the software?
- **Compatibility** – Are there legacy systems that the new software must work with? Does it need to run on a particular platform?
- **Skills** – What skills do your existing staff or volunteers have? What skills do end users have? How adaptable are people to new software?

Step #1 ... and constraints

Constraints	Description
Budget	<<WHAT IS THE BUDGET AVAILABLE FOR THIS SOFTWARE?>>
<u>Timeframe</u>	<<HOW QUICKLY DO YOU NEED TO IMPLEMENT THE SOFTWARE? DOES IT NEED TO BE SOMETHING THAT CAN BE UP AND RUNNING TOMORROW? OR IS THERE TIME FOR CUSTOMIZATION AND CONFIGURATION WORK?>>
Compatibility	<<ARE THERE LEGACY SYSTEMS THAT THE NEW SOFTWARE MUST WORK WITH? DOES IT NEED TO RUN ON A PARTICULAR PLATFORM?>>
Skills	<<WHAT SKILLS DO YOUR EXISTING INFORMATION TECHNOLOGY STAFF OR VOLUNTEERS HAVE? WHAT SKILLS DO END USERS HAVE? HOW ADAPTABLE ARE PEOPLE TO NEW SOFTWARE?>>
Other notes	

Step #2 – Identify options

- **Recommendations** – Ask people you know what packages they have used and liked in the past.
- **MMTK resource list** – A list of mature applications and reference sites has been included with the list of additional resources for this workshop.
- **Reviews and directories** – Look at sites like OSDir.com and OpenSourceCMS.com.
- **Software package sites** – Most open source software packages have their own web site.

Step #3 – Detailed review

- **Quality** – How well do the features you need seem to work? Do you like how they have been implemented?
- **Ease of use** – Is the process of using the software intuitive and obvious given the skills of the people who will be using it?
- **Ease of migration** – If moving from another software package, how hard is the migration process?
- **Stability** – Does the software crash often? Is a lot of effort required to maintain it and keep it running?

Step #3 – Detailed review

- **Compatibility** – Does the software use file formats and communications protocols that are based on widely accepted open standards? Is it compatible with other systems you are using?
- **Flexibility** – How hard is it to customize and adapt the software to your organization's needs? Will the software grow with your needs? Is it scalable?
- **User response** – When given a chance to test the software, how did users respond? Were they able to figure it out?

Step #3 – Detailed review

- **Buy-in** – Is there broad support for a particular package within your organization? Are there any major detractors?
- **Wide use** – Is there evidence that others are using this software package? Does the popularity of the package seem to be increasing or declining?
- **Support community** – Is there an active online support community? Are there recent postings to the support mailing list? If you post a question, does someone from the community get back to you?

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