

A Practical Guide to Open Sourcing Proprietary Source Code

**Ibrahim Haddad, Ph.D.
Head of Open Source Group
Samsung Research America – Silicon Valley**

Ibrahim.H@Samsung.com

Content

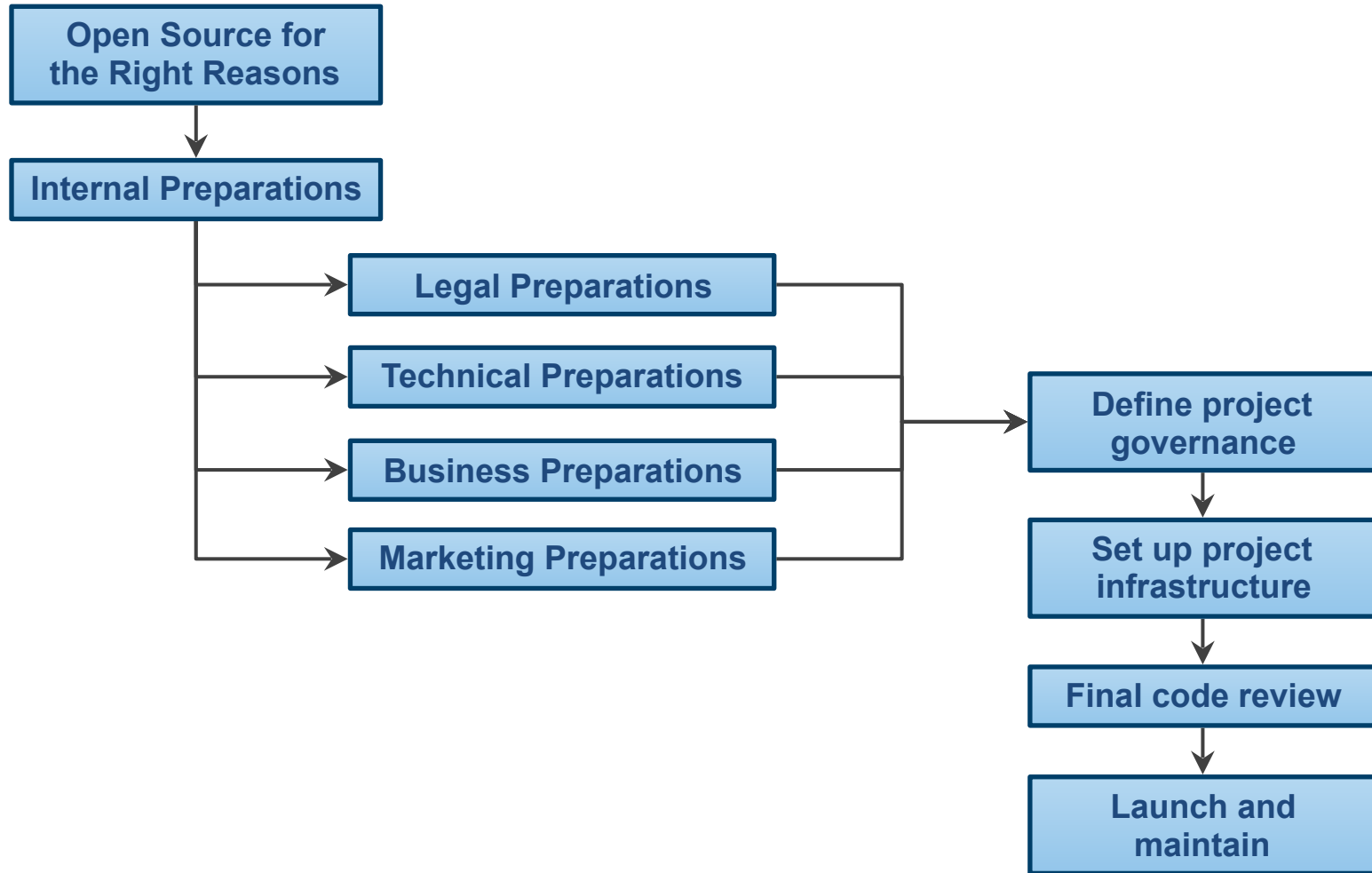
- **High level process**

- **Preparations**

- Business
- Legal
- Technical
- Marketing

- **Project governance**

High Level Process Overview



Preparations: Process Walkthrough



Business Preparations

● Determine the overall strategy

- Defend the “Why are we doing this?” question
- Explain the business case/value proposition

● Ensure there is an internal corporate champion for the project

- Ensure there is a commitment for resources (developers)
- Ensure there is a commitment for funding open source project infrastructure

Legal Preparations

- **Legal due diligence:**

- Patent scrub to identify IP areas in the source code
- License/copyright
 - Decide on the license to release under
 - Provide license information to embed in source code
 - Provide standard copyright notice to embed in source code
- Decide on a contributor agreement [if starting a new open source project]
- Decide on trademark use, requirements, and process
- Run a source code scanning tool on the internal code
 - Ensure clean bill of materials
 - Identify all source code originating from outside your company
- Other items as necessary

License Selection Considerations

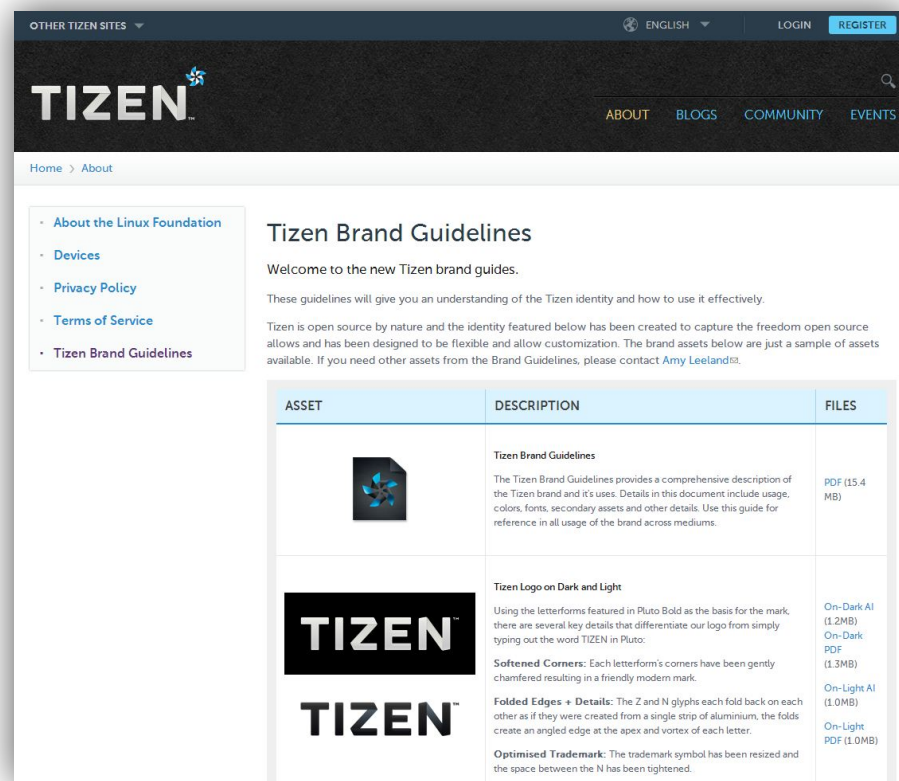
- **Use a mainstream OSI-approved license (<http://opensource.org>)**
- **Some factors to consider in choosing a license:**
 - Do you want to relinquish any control over how your code is used and distributed?
 - Do you want to allow people to use your code in non open-source programs?
 - If somebody uses your code in their program and sells their program for money, do you want some of that money?
 - Do you want to ensure all future derivatives distribute source code?
 - Do you want your code to be usable in both open source and proprietary products?
 - If it's a library, should non-open source code be allowed to link to it?
 - Etc.

Technical Preparations

- **Clean up the code**
 - Ensure coding style is consistent
 - Remove internal comments, references to other internal code, etc.
 - Remove any code not part of open sourcing plan
 - Remove dependencies on non-public components
- **Add license and copyright notices**
 - Add license notice in source code files
 - Add license text as a file in the root directory
 - Update copyright notices in source code files
- **Prepare the code for new external users**
 - Provide documentation and use case examples
 - Ensure it compiles and builds on target platforms
 - Fully document all APIs
 - Etc.

Marketing Preparations

- Design project logo, color scheme, website, collateral, etc.
- Formalize branding guidelines (compliance program?)
- Register social media accounts for the project
- Register domain names
- Etc.



Define Project Governance



Project Governance

- **What is governance?**
 - The structure around a project that enables decisions on:
 - Participation guidelines and requirements
 - Architectural changes
 - Nominating maintainers
 - Final arbiter on disputes
 - Suspension of participants
 - Etc.
 - Often similar to a board of directors
 - Typically represents mix of project contributors

Governance Decisions

- **All projects should define and communicate, at minimum:**

- Processes for submitting code, patches, feature ideas, etc.
- Process for technical conflict resolution
- Release management process

- **A multi-company project may need more formal governance**

- Decide on how governance is structured, who can participate, for how long, etc.

- **Example roles of a steering group**

Recommendations for formal governance

- Governing body should represent various participating entities
- Democratic system
- Clear decision-making process
- Clear path to resolve disputes
- Flexibility to adapt to changing project needs
- Clear means to add new or replace members

Project Maintainer

- **A formal position of leadership within the project**

- **Responsibilities include**

- Setting the criteria for accepted / rejected code
- Reviewing submitted code / accept and reject based on pre-defined rules
- Tracking dependency issues
- Notifying developers of source code changes that may affect their packages
- Managing source code security issues

Setup Project Infrastructure



Setup Project Infrastructure

- **Essential components**

- Web site
- Source code repository system
- Mailing lists
- IRC
- Bug and feature tracking

- **Nice to have**

- Wiki
 - User contributed documentation
 - How-tos
 - Works-for-me platform testing results
 - Team collaboration
- Milestone and release tracking
- Forums
 - Support requests, community discussion, and bar talk
- Branding
 - Logo, style guide, graphics, official colors or fonts
- Automated build and test system

Project Infrastructure Examples: Front Page

What the project does

Where to find the code

Who is involved

The screenshot shows the website for the Long Term Support Initiative (LTSI) Workgroup. The browser address bar shows 'ltsi.linuxfoundation.org'. The website has a navigation bar with links: Home, What is LTSI?, Developers, Users, Downloads, and Participate. A search bar is located in the top right. The main content area features a large banner for the 'Embedded Linux Conference' with the text 'February 15 - 17, 2012 • Hotel Sofitel SF Bay, Redwood Shores, CA'. Below the banner, there is a section titled 'The LTSI is an ecosystem-wide collaborative project hosted at the Linux Foundation to create and maintain a common Linux base for the use in a variety of CE products and to enable faster contributions upstream and better alignment with the mainline kernel.' To the right of the banner, there is a section for the 'February 15 - 17, 2012 • Hotel Sofitel SF Bay, Redwood Shores, CA' conference, describing it as the premier vendor-neutral technical conference for companies and developers using Linux in embedded products. Below this, there is a section titled 'LTSI Blog' with the text 'The latest from LTSI.' and a link to 'Introducing the LTSI Project'. The 'Introducing the LTSI Project' article is dated December 26, 2011, and describes the project's goals. To the right of the blog section, there is a section titled 'Participating Organizations' with the text 'See who is involved in LTSI.' and a grid of logos for various companies including HITACHI, hp, IBM, intel, NEC, Panasonic, Qualcomm, RENESAS, SAMSUNG, and SONY. At the bottom left, there is a section titled 'LTSI Releases' with the text 'LTSI Trees.' and a list of links for 'Current LTSI Tree: 3.0.0', 'Current LTSI Staging Tree: 3.0.0', and 'Current Industry Staging Tree: 3.0.0'. Annotations with arrows point to specific parts of the page: 'What the project does' points to the main description of LTSI; 'Where to find the code' points to the 'LTSI Releases' section; and 'Who is involved' points to the 'Participating Organizations' section.

LONG TERM SUPPORT INITIATIVE

Home What is LTSI? Developers Users Downloads Participate

The LTSI is an ecosystem-wide collaborative project hosted at the Linux Foundation to create and maintain a common Linux base for the use in a variety of CE products and to enable faster contributions upstream and better alignment with the mainline kernel.

Embedded Linux Conference

February 15 - 17, 2012 • Hotel Sofitel San Francisco Bay • Redwood Shores, CA

February 15 - 17, 2012 • Hotel Sofitel SF Bay, Redwood Shores, CA

The Embedded Linux Conference (ELC) is the premier vendor-neutral technical conference for companies and developers using Linux in embedded products.

ELC is embedded Linux experts talking about solutions to your embedded Linux problems. ELC consists of 3 days of presentations, tutorials and Bird-of-a-Feather sessions. There are over 50 sessions to choose from, on a wide variety of topics.

Submit a proposal today!

LTSI Blog
The latest from LTSI.

Introducing the LTSI Project
Submitted by brian on December 26, 2011 - 00:42

On October 25, 2011, [The Linux Foundation](#), the nonprofit organization dedicated to accelerating the growth of Linux, announced it is hosting a new project created by its Consumer Electronics (CE) workgroup.

The new project, the Long Term Support Initiative (LTSI), provides for both an annual release of a Linux kernel suitable for supporting the lifespan of consumer electronics products and regular updates of those releases for two years.

[more blogs](#)

LTSI Releases
LTSI Trees.

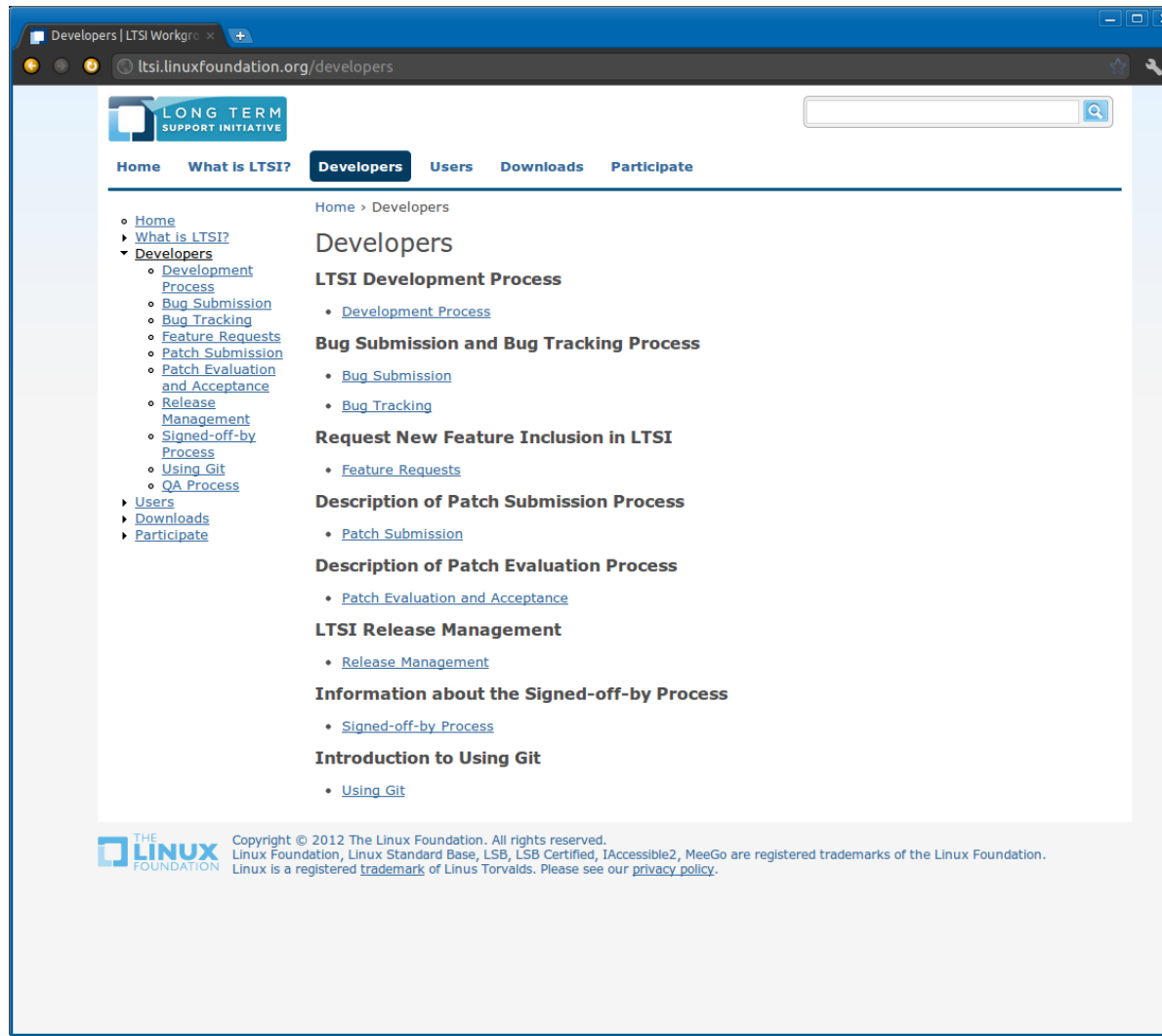
- Current LTSI Tree: [3.0.0](#)
- Current LTSI Staging Tree: [3.0.0](#)
- Current Industry Staging Tree: [3.0.0](#)

[more releases](#)

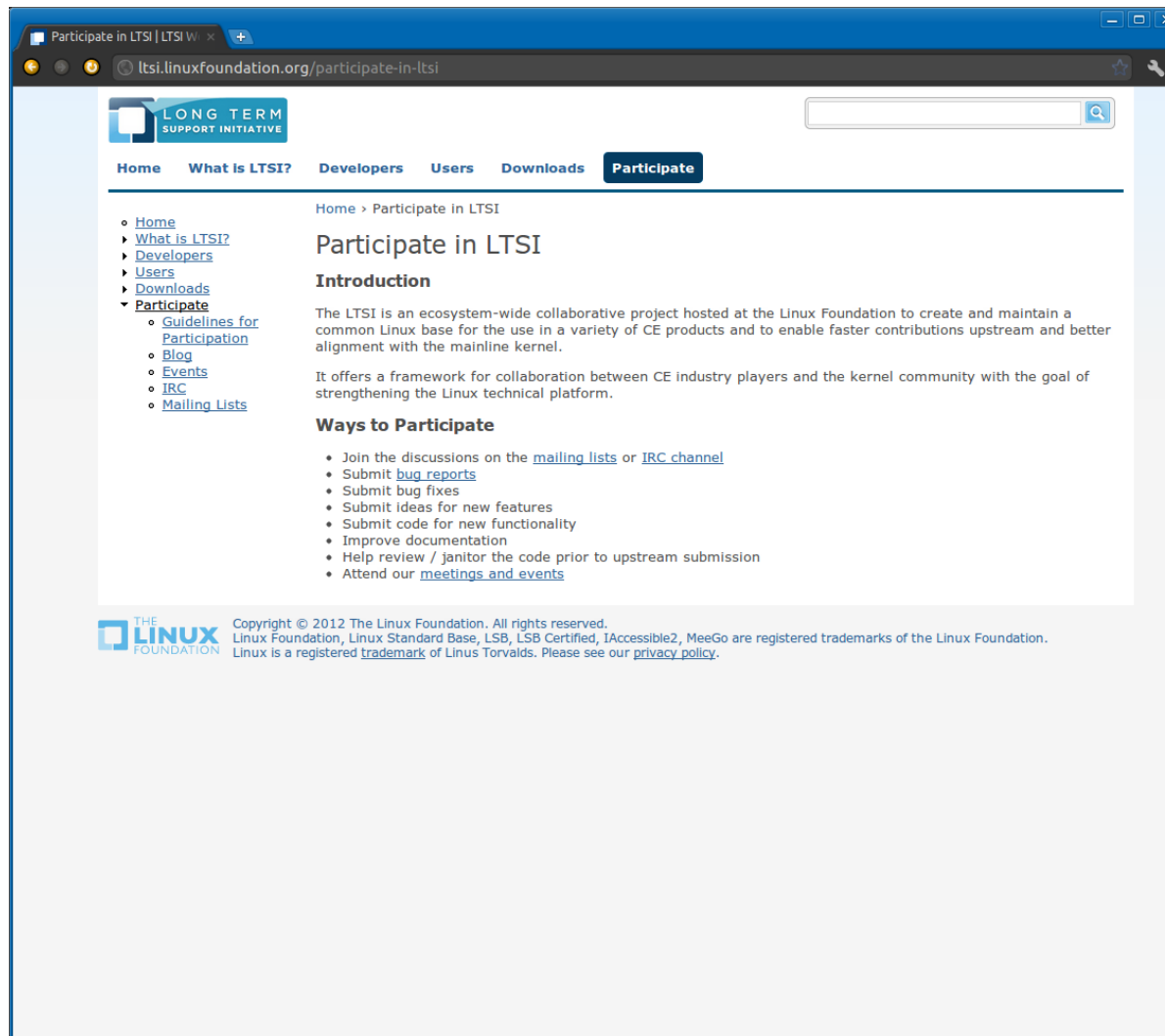
Participating Organizations
See who is involved in LTSI.

HITACHI hp
IBM intel
NEC Panasonic
Qualcomm ATHEROS RENESAS
SAMSUNG SONY

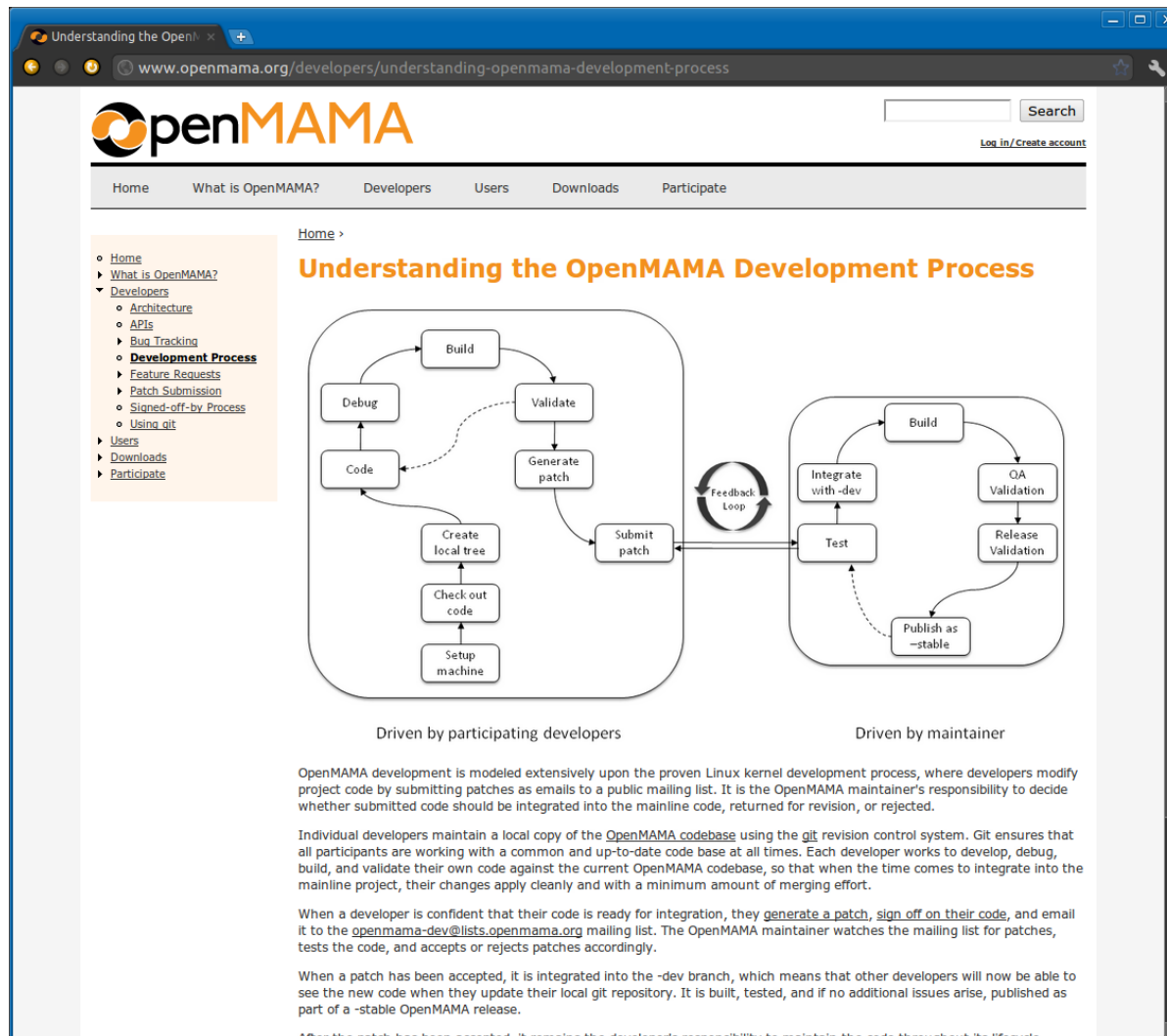
Project Infrastructure Examples: For Developers



Project Infrastructure Examples: Get Involved



Project Infrastructure Examples: Processes



Project Infrastructure Examples: Processes

The screenshot shows the OpenMAMA website at www.openmama.org/developers/submitting-requirements-feature-requests. The page title is "Submitting Requirements & Feature Requests".

Navigation Menu: Home, What is OpenMAMA?, Developers, Users, Downloads, Participate.

Sidebar Links:

- Home
- What is OpenMAMA?
- Developers
 - Architecture
 - APIs
 - Bug Tracking
 - Development Process
 - Feature Requests**
 - Sample Email
 - Patch Submission
 - Signed-off-by Process
 - Using git
- Users
- Downloads
- Participate

Main Content:

Submitting Requirements & Feature Requests

OpenMAMA is an open source project that accepts contribution from its user and development communities. Input can be in various forms: [reporting bugs](#), [submitting patches](#), [submitting requests](#) and [code for new features](#), etc.

As with any open source project, when project contributors are actively involved in the project by providing useful feedback and high quality code submissions, you will build trust with the project maintainers and increase the effectiveness of your interactions. As you build trust within the community for the quality of your work, you will be given increased opportunity to help set direction.

The feature request process is meant to ensure that requests are captured, discussed, prioritized, and if accepted, planned for development and release in an orderly fashion.

Before you open a feature request, please make sure you are [using the right process](#).

Tracking Requirements and Feature Requests

Requirements and feature requests are tracked and prioritized in public via <http://bugs.openmama.org>, prior to acceptance into OpenMAMA. This ensures a common understanding of which features have been requested, their relative priority, their development status and when they are planned for release.

Major feature requests go through multiple stages of feedback as explained below. This ensures that a request is strategic to the direction of OpenMAMA before resources are dedicated to implement it, and also that there is a broad understanding of why the feature is needed and that there is willingness to maintain the feature through its lifecycle.

1. Feature requests begin with a proposal to the openmama-dev@lists.openmama.org mailing list or as a feature request in <http://bugs.openmama.org> by the person who has the idea and whoever is likely to do the work implementing the requested feature. This is to notify others, solicit feedback, and gain acceptance for the idea, and come to a consensus on next steps.

Please use [the OpenMAMA standard format](#) when posting feature request emails.

2. Next, create a feature request at <http://bugs.openmama.org> (only if you have not done so originally). When you [create the request](#), please be sure that you click "Show Advanced Fields," and select "Feature request" as the category, and include as much detail as you can.

Additional feedback may be provided in the comments area.

3. The OpenMAMA system or subsystem maintainer will evaluate the request, and determine whether it is a candidate for a future release. There will be discussions between the requester and the development team on the mailing list. If the request is approved, a target release will be set, and development can begin in earnest.

Submitting the Feature

New Feature Request Process

```
graph TD
    A[Feature request submitted to mailing list] --> B[Discussion of submission on mailing list and IRC]
    B --> C[Feature is accepted - consensus on its need]
    C --> D[Ticket created in bugs.openmama.org]
    D --> E[Feature is prioritized]
    E --> F[Feature lined up with a release number]
    F --> G[Resources allocated]
    G --> H[Source code development starts]
```

Project Infrastructure Examples: Sign-off-by

The screenshot shows a web browser window with the address bar displaying "www.openmama.org/developers/signed-process". The page features the OpenMAMA logo at the top left, a search bar at the top right, and a navigation menu with links: Home, What is OpenMAMA?, Developers, Users, Downloads, and Participate. A sidebar on the left contains a tree view of the site's structure, with "Signed-off-by Process" highlighted under the "Developers" section. The main content area is titled "Signed-off-by Process" and explains that the OpenMAMA project uses the signed-off-by language and process, used by the Linux kernel, to provide a clear chain of trust for every patch received. It includes a section for the "Linux Kernel Certificate of Origin v 1.1" with a certification text and a list of conditions (a, b, c, d). Below this, it discusses "Using this Process" and provides instructions on how to use the signed-off-by process, including a link to the official policy at kernel.org. The footer contains links for Home, About, Training, and a copyright notice for 2011 Linux Foundation.

Signed-off-by Process | OpenMAMA

www.openmama.org/developers/signed-process

openMAMA

Search

Log in / Create account

Home What is OpenMAMA? Developers Users Downloads Participate

Home >

Signed-off-by Process

The OpenMAMA project uses the signed-off-by language and process, used by the Linux kernel, to give us a clear chain of trust for every patch received.

Linux Kernel Certificate of Origin v 1.1

"By making a contribution to this project, I certify that:

- The contribution was created in whole or in part by me and I have the right to submit it under the open source license indicated in the file; or
- The contribution is based upon previous work that, to the best of my knowledge, is covered under an appropriate open source license and I have the right under that license to submit that work with modifications, whether created in whole or in part by me, under the same open source license (unless I am permitted to submit under a different license), as indicated in the file; or
- The contribution was provided directly to me by some other person who certified (a), (b) or (c) and I have not modified it.
- I understand and agree that this project and the contribution are public and that a record of the contribution (including all personal information I submit with it, including my sign-off) is maintained indefinitely and may be redistributed consistent with this project or the open source license(s) involved."

Using this Process

We have the same requirements for using the signed-off-by process as the Linux kernel.

In short, you need to include a signed-off-by tag in every patch:

Signed-off-by: this is a developer's certification that he or she has the right to submit the patch for inclusion into the project. It is an agreement to the Developer's Certificate of Origin (above). Code without a proper signoff cannot be merged into the mainline.

If you are unfamiliar with this process, you should read the [official policy at kernel.org](#) and you might find this article about [participating in the Linux community on the Linux Foundation website](#) to be a helpful resource.

Home
Home
About
Developers
Users
Downloads
Participate

About
FAQs
Participating Companies
Privacy Policy
Terms of Service
Trademark

Training
Linux Performance Tuning
Linux Developer Training
Open Source Compliance

THE LINUX FOUNDATION

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Linux is a registered trademark of Linux Torvalds. Please see our [privacy policy](#).

Final Code Review Before Release



The final code review

- Ensures all requirements identified by the business, legal, technical, and marketing reviews are completely met

- **Examples:**

- License, attribution, and copyright texts are all complete and in place
- Source code scanner reports clean bill of materials
- Every line of code is licensed appropriately for release
- Comments are sanitized of casual or unrelated language
- Source code does not inadvertently reveal internal projects

Project Launch



Prior To Launch

- **Build critical mass before launching**

- Provide preview to customers and partners so they can begin to work with the code
- Lobby for launch-day participants among your existing business partners

- **Train your employees to follow open source methods and processes**

- **Ensure that all project infrastructure is running, secure, and scalable**

- **Ensure internal developers join and continually monitor IRC channel, mailing lists, etc.**

Is This Your First?

- **Train your employees and managers**

- Open source development methods and processes
- Working with the open source community
- Your company's open source policies and compliance rules
- Integrating open source software within your software development model

- **Follow open source practices internally**

- Context switching between development practices is difficult

Be a Good Open Source Citizen

- **Have conversations and make decisions in the open**

- Builds goodwill, but also reduces overhead in documenting decisions
- Streamlines onboarding process for new participants
- Archives ensure continuity if participants change

- **Listen to the community**

- They know what they are doing, particularly on integration and testing
- Encourage generalized implementations that extend what you need, particularly if someone else volunteers

After the launch

- **Work on building a developer community**

- Is it easy to find and join as an outsider?
- Does the community have the documentation they need, and a means to update it?
- Is the process for accepting community code working?

- **Follow open source development model & practices**

- **Remain visible**

Closing



Thank you.

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Head of Open Source Group
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Ibrahim.H@Samsung.com