

# Starting a State Government Open Source Project

“Officers of government are trustees and servants of the people and it is in the public interest to enable any person to review and criticize their decisions even though such examination may cause inconvenience or embarrassment.” 1  
V.S.A. § 315

Tom Cort <tom.cort@state.vt.us>  
Systems Developer II  
Vermont Department of Taxes



# What is Open Source Software?

- ◆ Free Redistribution
- ◆ Source Code
- ◆ Derived Works
- ◆ Integrity of The Author's Source Code
- ◆ No Discrimination Against Persons or Groups
- ◆ No Discrimination Against Fields of Endeavor
- ◆ Distribution of License
- ◆ License Must Not Be Specific to a Product
- ◆ License Must Not Restrict Other Software
- ◆ License Must Be Technology-Neutral



# What is State Government Software?

- Software that could potentially be released as open source.
- Developed and maintained “in house” by one or more state agencies or departments.
- Developed and maintained by state employees or state contractors
- Used by one or more state agencies or departments.
- “Owned” by the state (no 3<sup>rd</sup> party copyright / patent claims).
- Development and maintenance funded with public money (taxes).



# What is the Gateway Project?

- Implements Streamlined Sales Tax web services.
- Provides a web interface.
- Provides client applications.
- Designed to be an extensible framework upon which future tax software can be built.
- Modernized eFile (MeF) coming soon!
- Project Website: <http://gateway.sf.net/>



# Where to begin

- Like IT infrastructure changes, development process changes are usually rolled out gradually.
- Be realistic about expectations.
- Start out small with one project and see how it goes.
- Some people may have never heard of OSS. How you handle this will influence how they think and feel about open source software.
- Educate everyone on the team about what open source is and what it means. See [ProducingOSS.com](http://ProducingOSS.com) for a free eBook.
- Try to get at least one person on the project team who has open source experience.
- Be prepared for skepticism and criticism.



# What kind of project makes a good candidate for open source?

- Not written in a proprietary language like VB.net. Do compilers exist for GNU/Linux?
- Does not depend solely on proprietary tools like Visual Studio. Can it be developed and built with open source tools?
- Does not depend on proprietary libraries. Are all the dependencies open source?
- Does not depend on proprietary software to run. Are there any closed databases or closed apps that are needed to run the software?
- Generally useful. Would at least 3 other people find some or all of the software useful?



# In the beginning...

- Gateway started out as a closed source application.
- Built using open source tools (subversion, eclipse, apache axis, saxon, mysql, etc).
- Small development team.
- Rumors that one day the code *might* be open.



# Getting approval vs just do it

- You can either ask management for permission to release the code as open source software or you can just release it on your own and hope no one gets mad or fires you.
- Both ways work!
- Getting formal approval is best for business critical applications.
- Just releasing the code is best for “one off” projects and patches.
- The gateway was approved by management.





# Arguments for the Gateway

- Cost - It takes very little effort and doesn't cost the state anything to publish the source code, we use a free service called Source Forge. If we receive source code contributions from outside developers it will actually result in a savings because the contributed code is code that Vermont didn't have to pay developers to write.



# Arguments for the Gateway

- To be a good Neighbor - Many states are implementing Streamlined Sales Tax and other XML-based electronic return systems. Sharing the code with fellow states would be a nice thing to do because it helps them accomplish their goals while reducing their costs. Additionally, other Vermont agencies and departments could adapt and enhance the code to meet their needs.



# Arguments for the Gateway

- Education - Vermonters who are studying Java software development could learn by studying our code. Our code has a lot of interesting pieces in it that aren't directly related to taxes (our event logging system, authentication system, unit test setup, etc). Developers of open source software could legally copy and use the code in their projects.



# Arguments for the Gateway

- Better Software - With more people using our code and more developers looking at our code, bugs would be more easily spotted and fixed. Sharing the code with the transmitters who send us data allows them to test changes to their software and debug problems more easily. They could examine exactly what our code does with their input and setup their own private testing environment.



# Security Concerns

- Open source code means anyone can download, inspect, and test your software for security vulnerabilities.
- Anyone could help you fix a problem and anyone could exploit a problem.
- Both closed source and open source applications have security holes that can be found and exploited by anyone.
- IMHO, neither methodology is “better” or more secure. Always code with security in mind.
- If the software is internet accessible, think about what data lives on that server.



# Security Disclosure Policy

- Decide on what your security disclosure policy will be before you find out about a security issue.
- Full Disclosure
- Full Disclosure with Patch
- Staggered Disclosure
- Limited Disclosure
- Silent Fix



# Choosing a license

- Open Source Initiative <http://OpenSource.org>
- Free Software Foundation  
[http://www.fsf.org/licensing/licenses/index\\_html](http://www.fsf.org/licensing/licenses/index_html)
- Read all of the licenses!
- Figure out what you want the license to do (copyleft or not, notice files or not, GPL compatible or not, etc).
- Look at what other like software uses for its license. (Example, Java usually is Apache 2.0)
- Stop license proliferation, choose an existing license that meets your criteria.
- Don't start a war over the license.



# Determine copyright information

- Find out the exact text to use for the copyright line.  
“Vermont”, “State of Vermont”, “VT Tax Dept” or  
“Vermont Department of Taxes”
- Usually the website for your department or agency has a  
copyright message you can copy.
- Decide if contributors must assign copyright or make a  
written statement that his/her contributions are legal.





# Choosing a development model

- How will you deal with outside contributors?
- Core team
- Committers and contributors
- Voting/Polling
- Benevolent Dictator
- Define your own?
- Document this for later. It is important that external devs know how to submit patches. *Enable Participation!*



# Preparing the source code

- Read every line of code.
- Make sure there is a copyright header in every source file.
- Make sure no passwords, private keys, host names, or other private/semi-private information exists in the code.
- Make sure the code looks good (non-vulgar comments, indentation, no ugly hacks, etc)
- Tip: use `svn:externals` in subversion to allow you to keep a set of private configuration and password files.



# Version Numbering

- A lot of numbering schemes exist.
- Single number: udev-115
- Major, Minor: gateway-3.0
- A.B.C[.D]: linux-2.6.22.6
- The exact scheme doesn't matter
- Pick one that you'll stick to
- Document the scheme on your download page
- Make it clear what code is production ready and what is beta/alpha/rc.



# Preparing the documentation

- Must explain what the software is and what it does.
- Must describe how to install and run the software.
- Must explain how to build from source.
- If possible, it should describe the source code (javadoc, doxygen).
- Is best with screen shots, commands, and examples.



# Preparing the website

- You need a website!
- Should include all documentation.
- An FAQ to answer repeat questions.
- A download page so people can get the software.
- Project News so people know what's happening.
- A project road map so people know what's going to happen.
- A guide for people interested in contributing.
- Links to other project resources (bug tracker, continuous integration, mailing lists, svn/cvs).
- A clear point of contact for discussion, getting help/support, suggesting features/improvements and reporting bugs.



# Preparing other services

- IRC – chat room. May not be the best idea for state employees to be chatting. See [Freenode.net](http://Freenode.net)
- Mailing lists. Make sure all project members are subscribed and read the incoming mail.
- Source control. Educate all of the developers on the best practices and common features. All developers should know how to add code, remove code, create a patch, apply a patch, revert a change, create a branch, merge code from two branches, and resolve a merge conflict.
- Wiki. Be careful that it isn't interpreted as the official word of the state. Watch out for spam.



# Preparing the first release

- Make sure your copy of the code is up to date.
- Make sure the documentation is up to date.
- Create a source package with all of the source code.
- Optionally create 1 or more binary packages.
- Packages should be in standard formats (no 7z please).  
Windows installer should be .exe or .msi. Linux packages should be .rpm, .deb, .ebuild, etc. Linux sources should be .tar.gz or .tar.bz2. Windows sources should be .zip.
- Test the software packages you just made and the documentation before uploading them.



# Write a Press Release

- Get the word out to potential users and the general public.
- <http://gateway.sourceforge.net/local/GatewayInitialOpenSourceRelease.pdf>



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## Vermont releases Gateway as an open source project

摘自: [www.linuxpr.com](http://www.linuxpr.com) 被阅读次数: 44

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The Vermont Department of Taxes Gateway Team is pleased to announce the initial open source release of Gateway

**Montpelier, Vermont, United States - 17. Jun 2007** - The Vermont Department of Taxes Gateway Team is pleased to announce the initial [open source](#) release of Gateway. Gateway is a JavaEE application developed by the [Vermont Department of Taxes](#). It provides a web services framework for accepting [Streamlined Sales Tax](#) registrations and returns. It also includes a web interface for manually submitting transmissions. The goal is to build an extensible framework upon which future tax services can be built.

Many states have struggled implementing Streamlined Sales Tax and other XML-based electronic return systems. The Vermont Department of Taxes is venturing into the open source arena in an effort to improve interstate collaboration on development projects. Gateway is built leveraging a number of open source technologies, and using open source tools. It is designed to be easily modified and easily extended for use in other states.

The Vermont Department of Taxes Gateway Team is sharing this development work in hopes that it will help other states accomplish their goals while reducing costs for everyone. More information can be found at the Gateway project website at <http://gateway.sourceforge.net>.

原文链接: <http://www.linuxpr.com/releases/9780.html>

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# Finding a Project Hosting Provider

- 4 Options: current agency/dept website, self-managed infrastructure, canned OSS hosting, custom OSS hosting.
- current agency/dept website is usually too limited or requires too much paper work to get setup.
- self-managed infrastructure requires hardware and someone with enough time to maintain it.
- canned hosting is free and gives you complete control over everything you need to run a project.
- custom OSS hosting can be hard to get, but its much more flexible than the canned stuff.



# Free Canned OSS Hosting

- Source Forge - [sourceforge.net](http://sourceforge.net)
- Savannah - [savannah.nongnu.org](http://savannah.nongnu.org)
- Gna! - [gna.org](http://gna.org)
- berliOS - [berlios.de](http://berlios.de)



# Custom OSS Hosting

- OSU Open Source Lab - [osuosl.org](http://osuosl.org)
- Universities with open source friendly admins.
- Linux/Unix User Groups



# Being a good community member

- Report bugs and submit patches to other projects.
- Join mailing lists and help people.
- Develop in the open.
- Acknowledge contributors and developers when they contribute. Add a note in the change log and commit log, thank them by e-mail or on a public mailing list, thank users for submitting bug reports, etc.



# Implementing Open Standards

- A standard exists for just about everything, you just have to look.
- Search for standards before implementing new storage or data transfer functionality. IETF RFCs, ISO, ANSI, OASIS, etc.
- Choose only open standards.
- Implement all required parts of the standard correctly.



# Donating Money to OSS Projects

- Hard to get funding to pay for something that's free.
- FSF Associate Membership - <http://member.fsf.org>
- OSU Rackathon - <http://osuosl.org/contribute/rackathon>
- SF.net Subscription - <http://sourceforge.net/subscribe/>
- Donating to a specific project.



# Impressions and Surprises

- Easier than expected to get upper level management on board.
- Harder than expected to get other states involved.
- We haven't gotten a single patch, bug report, feature request or mailing list message from anyone outside the VT Tax Dept.
- We got a lot of encouragement from the open source community and the tax community.
- Enables state employees to work from home.
- Many open source libraries lack complete documentation. Being able to view source code helps.



# Gateway Demo





# Questions/Comments?

Gateway Project Website  
<http://gateway.sourceforge.net/>

Gateway Demo Site  
<http://gateway-demo.osuosl.org/>

Vermont Department of Taxes  
<http://tax.vermont.gov/>

