Kuali OLE Project Overview

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http://ole.kuali.org
KUALI OLE
Kuali OLE Project Overview

• What is Kuali OLE?
• Who is Kuali OLE?
• Why Kuali OLE?
• What does Kuali OLE do?
• How to get involved?
What is Kuali OLE?
What is Kuali OLE?

Kuali OLE (Open Library Environment) is a community source next-generation library management system developed through a partnership of research libraries with the Andrew W. Mellon Foundation.

OLE is a next-generation library system meeting the following requirements:

- Flexibility in design
- Community ownership based on an open source license
- Service-Oriented Architecture with a modular framework
- Enterprise-level integration
- Efficiency in ability meet both current and future business needs
- Sustainability in design to allow for the evolution of software, hardware, and mission
Kuali OLE is Software

• Enterprise Java with services middleware
• Built to integrate & interoperate
• A platform for development
• Designed for libraries by librarians!
• Web services APIs
Who is Kuali OLE?
Kuali OLE is Community

Kuali OLE (Open Library Environment) is also an open partnership among academic libraries to provide for our evolving needs.
Kuali OLE is a Solution

- For developing and managing a next generation, library services platform
- KOLE is building to meet the following requirements:
  - Flexibility in design
  - Community ownership with an open source license and strong vendor support
  - Modular Service-Oriented Architecture
  - Enterprise-level integration
  - Meet current and future business needs
  - Sustainable design enabling the evolution of software, hardware, and mission

Kuali Days UK
June 19, 2014
Kuali OLE Eco-System
Kuali OLE and IU
IU Libraries Current Systems

Symphony
- Cataloging/Auth
- Circulation
- Serials Control
- OPAC

Other vendors
- Acquisitions
- Course Reserve/VRE
- Special Collections
- Interlibrary Loan
- ALF Storage

OPAC Discovery tools
- Blacklight (IUCat)
- Ebsco Discovery Service
Kuali OLE at Indiana University Libraries

**OLE**
- Cataloging/Auth
- Circulation
- Serials Control
- Acquisitions

**Interface to**
- Course Reserve/VRE
- Special Collections
- Interlibrary Loan
- ALF Storage

**OPAC Discovery tools**
- Blacklight (IUCat)
- Ebsco Discovery Service

Kuali Days UK
June 19, 2014
Why Kuali OLE?
In Transition:
The Current Library Management System Landscape

Systems of Libraries Considering Migration 2013

- Voyager
- Millennium
- Horizon
- Aleph
- Virtua
- Symphony
- Evergreen
- Evergreen
- Polaris
- Apollo

In Transition: The New Library Management System Landscape

Candidate Systems Considered for 2013

- Alma
- Intota
- Sierra
- WMS
- Kuali OLE
- Koha
- Evergreen
- Symphony

What does Kuali OLE do?
KOLE Functional Architecture

- Four functional modules
- Overlapping functionality
- Iterative and maturing capabilities
- Open architecture and code
- Built on Kuali enterprise architecture
Functional Architecture – Select & Acquire


Bibliographic Records (OCLC & Vendors)

Financial Infrastructure
OLE-FS

Serials Management
Print and Electronic

ERM
Licensing, Entitlements

Selection
Pre-orders / requisitions and Requests

Acquisitions
Purchasing, Receiving, Payments

GOKb
Vendors & Suppliers
Enterprise Systems
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Functional Architecture – Describe

- Describe – [http://www.kuali.org/ole/modules/describe-manage-entity](http://www.kuali.org/ole/modules/describe-manage-entity)
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Functional Architecture – Delivery

• Deliver – http://www.kuali.org/ole/modules/deliver-entity
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- 11286 items found, 200 items retrieved. Please refine your search criteria to narrow down your search.
Functional Architecture – Systems Integration

• Systems Integration – http://www.kuali.org/ole/modules/systems-integration-entity
OLE Release 1.5 Scope

- Completed by the Functional Council at Kuali Days 2013
- Focus is on the Early Adopter Release
- Packaged and released for 2-July
- Select and Acquire
  - E-Resource renew, copy, cancel, and link to other documents
- Serial renewals
- Budget snapshots
- Describe and Manage
  - Cloning existing records
  - Global changes to OLE Instances (Item & Holding records)
  - Cataloging analytics
  - Clickable URLs

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OLE Release 1.5 Scope

- Deliver
  - Circulation standards: SIP/SIP2/RFID
  - Enhance patron and item checkout notes
  - Circulation calendar
  - Enhancements on account blocks and requests

- System Integration
  - User interface improvements
  - Search framework across modules
  - Compatibility with storage facility retrieval system

- Implementation Tools
  - Reporting tools
  - Distribution packaging
  - Framework for training development

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OLE Release 2.0 Scope

• Completed by Functional Council at KCW 2014
• Focus on General Release
• Package and release for 1st Quarter 2015
• Select and Acquire
  • Electronic resources management
    • Track platforms, subscriptions, and vendors/organizations
  • Initial GOKb integration
  • Triggers/alerts for future actions
  • Fiscal year rollover
• System Integration
  • Implementation loaders
  • Middleware upgrades
• Implementation Documentation!!!
Kuali OLE Partnership Implementation Timeline

Implementation Path for OLE Partners

- Summer 2014
  - Lehigh University
  - Bloomsbury Consortium (UK)

- Summer 2015
  - Duke University
  - University of Pennsylvania
  - Villanova University

- Winter 2015
  - North Carolina State University
  - Indiana University

- Summer 2016
  - Florida Consortium

- Winter 2016
  - University of Maryland
How to get involved?
Kuali OLE: How to Participate

- Join the KOLE Community!
- Be an adopter!
- Be a Subject Matter Expert!
- Be a developer!
Characteristics of Kuali OLE Organizational Fit

• **Build**
  - Active contributors to code base
  - Significant development resources in house

• **Borrow**
  - Capability to adopt and implement open source software
  - Some development resources in house

• **Buy**
  - Organizational requirement to purchase commercial software or software with commercial support
  - Development and hosting support for OLE available via KCA Commercial Affiliates (HTC Global, Vivantech)
TO RFP OR TO Prototype

Developing Procurement Options for Community Source Software
Kuali OLE Deployment Options

**OLE Hosted Option**
- Using one of our two KCAs institutions will opt for a contract that supports complete implementation - analysis, installation, migration, configuration, maintenance & support of Kuali OLE.

**OLE Local Option**
- Using local resources an institution will implement Kuali OLE on local or private cloud infrastructure and would rely on the Kuali OLE community for support and enhancement.

**OLE Hybrid Option**
- Select your competencies for local migration and implementation and out-source critical areas of deployment or migration, to leverage your resources and manage costs using commodity priced cloud infrastructure.
OLE Development Directions

• Consortial & federated support
  • Record ownership
  • Multiple charts of account
  • Work units
• Distribute training & demonstration database
• Full ERM functions & GOKb bidirectional integration
• Code contribution governance & management
  • Documentation portal
• Cloud implementations
For more on Kuali OLE:

Visit our website: http://ole.kuali.org
See our Test-Drive - http://kuali.org/test-drives
Visit GOKb: http://www.gokb.org

Follow us on Twitter: @kualiOLE
Read our Blog at: http://kualiOLE.tumblr.com
Follow us on Ohloh - https://www.ohloh.net/p/kole

Contact me at: rhmcdona@indiana.edu
Or Twitter at: @mcdonald