Kuali OLE – A Next Generation Library Management System
DEFF Master Class, Technical University of Denmark, Copenhagen, August 28, 2015

Introduction
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Kuali OLE – Short Overview

• OLE – Open Library Environment
• A „new generation“ integrated library system
• Developed by academic libraries for academic libraries
• Open source
• Live since August 2014
What means „Next Generation System“?

• Web- and cloud-based concept
• Modular design
• Open APIs
• Integration on enterprise level
• Back end system: acquisitions, cataloguing, circulation
• Integrated management for electronic resources (ERM)
• Front end integration of discovery services, e.g. VuFind, DigiBib, EDS (EBSCO)
Community
Beginnings

2008 / 2009 • Research study about the development of an open source LMS
  • Consortia of 8 American universities
  • Funded by the Mellon Foundation

2010 • Joining the Kuali Foundation
  • Finalize the software concept
  • Development contract with HTC Global Services
  • Continued funding by the Mellon Foundation

2012 • Joint development partnership with JISC, UK
  • Development of the Global Open Knowledge Base (GOKb)
Kuali OLE – Implementations

• August 2014 live – OLE version 1.5
  • Univ. of Chicago Library (est. 11.5 M items)
  • Lehigh Univ. Library (est. 1.1 M items)

• April 2015 first live in Europe, UK
  • Bloomsbury Colleges, London: School of Oriental and African Studies (SOAS) (est. 1.2 M items)

• December 2015, OLE version 1.6.2
  • Duke Univ. Library (est. 6.5 M items)

• 2016 – 2017 four more partner libraries
Kuali Foundation

• Objective
  • Develop and maintain open source administrative software for higher education

• Organization
  • Non-profit 501(c)3 organization
  • Community organization
    • Membership fees
    • Providing the infrastructure for the development of open source software for higher education
Kuali Foundation - Portfolio

- Kuali Financial System – financial management
- Kuali Coeus – research administration
- Kuali Open Library Environment – library management system
- Kuali Ready – operation plans
- Kuali Rice – middleware
- Kuali Student – e-learning / campus management
• Founded by the Kuali Foundation in August 2014
  • Commercial branch of the Kuali Foundation
  • Software development: code still open source → Affero General Public License (AGPL3)
  • Hosting: commercial service

• Objective
  • Speeding up the software development
  • Improvements concerning increase in integration and completeness of the services
  • Ensure sustainability of the software
  • Improvements in usability
OLE‘s position

- Software development will always be supervised and controlled by OLE Community (OLE Board, Functional and Technical Council)
- OLE project is financially independent from Kuali Foundation
- „Core value“: OLE is an open source system, freely available for libraries and library consortia
- Board is recently discussing OLE‘s path in future
Cooperation

• Membership in Kuali Foundation
  • fee depends on the institution's budget per year

• Partner of the OLE project
  • human resources (e.g. 1 FTE for project management)
  • membership in Functional and Technical Council
  • membership in SME (special matter expert) groups
  • OLE project partner fee
Concept
Functional Concept

- 4 connected modules
- Missing functionality can be developed and added at any time
- Open code and technical architecture
- Based on Kuali enterprise architecture

Quelle: https://www.kuali.org/ole/modules, 2015-08-17
Data Storage

- Libraries' meta data and external meta data
- Apache/SOLR
- Cloud based vs. stand-alone

- Meta data of licensed e-resources: e-journals, e-books and databases
- Source: libraries and commercial vendors
APIs

- Integration of 3rd party systems
  - Discovery, availability
  - Circulation: self-check machines, self-cash machines
  - Management of meta data, GOKb (ERM)
  - Acquisition / supplier: electronic ordering / invoice
  - Enterprise resource planning system (ERP) - scheduled
  - Statistics, reporting
  - Identity management
Software Development - Controlling

• Controlling of software development by partners
  • OLE Board
  • Functional Council and Technical Council

• Software development by commercial affiliate
  • Intention: e.g. consistent development, sustainability, professional knowhow

• Internal development possible
Software Development - Organization

Quelle: https://www.kuali.org/ole/organization, 2015-08-17
Software Development - Process

library staff
(workflow analysis, etc.)

Functional Council
(functional specifications,
task: yes/no)

IT librarians
(technical specifications for
HTC)

quality control

software developer HTC
/software development,
programming/
Perspective
## Kuali OLE - Roadmap

<table>
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<tr>
<th>OLE Version</th>
<th>Date</th>
<th>Functionality</th>
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| V. 1.6      | May 2015 | Internationalization (partly)  
Acquisition: fiscal year rollover  
SIP2 |
| V. 2.0      | Q3 2015 | Functionality for managing electronic resources (ERM)  
Integration of GOKb in Kuali OLE (initially: one-way)  
Incremental redesign of the user interface (ergonomics) |
| V. 3.0      | Q2 2016 | Authority data control  
Functional enhancements: cataloguing, acquisition and circulation |
| V. 4.0      |      | Multi tenancy, administrative tools for cloud management |
Thank you.

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