# Kuali OLE – A Next Generation Library Management System

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## Evaluation Project of hbz/VZG

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# Introduction

# hbz and VZG - Introduction

- hbz = **H**ochschul**b**ibliotheks**z**entrum des Landes Nordrhein-Westfalen / Library Service Centre of North Rhine-Westphalia

  - Situated in Cologne, NRW

  - Staff: ca. 85 FTEs

- VZG = **V**erbund**z**entrale des **G**emeinsamen Bibliotheksverbunds (GBV) / Head office of the Common Library Network

  - Situated in Göttingen, Lower Saxony

  - Staff: ca. 71 FTEs

# hbz and VZG - Introduction

- Two of six regional library service centres in Germany

- Hosts for **regional union catalogues** (collaborative cataloguing)

- Located in a **heterogeneous software environment** for its customers (libraries), data providers and data receivers

- Provide **ILS (SaaS), ILL, portals** and **other services**

# hbz and VZG - Introduction

**union catalogue …**

- for 72 academic libraries, 400 research libraries

- with more than 37 m bibliographic and 89 m holding records

- 122,000 e-journals

- 2,100,000 online resources (e-books, articles)

- using OCLC CBS since 1993

**ILS:** OCLC LBS

**union catalogue …**

- for ca. 60 academic library systems with more than 1,600 different libraries

- with more than 18 m bibliographic and 40 m holding records

- 120,000 e-journals

- 700,000 online resources (full text, e-books etc.)

- using Aleph / ExLibris

**ILS:** various, e.g. Ex Libris Aleph, OCLC Sunrise, Libero

# The OLE Project

# Initial Position and Motivation

- Today's library management systems (LMS) are at the end of their life cycle

  - Replacement concept needed

- Workshop „The Future of Integrated Library Systems", Göttingen 2012

- Market analysis as task for the library network headquarters hbz and VZG

  - Focus: software for academic libraries

  - Consider Open Source Systems beside commercial systems (Alma, WMS)
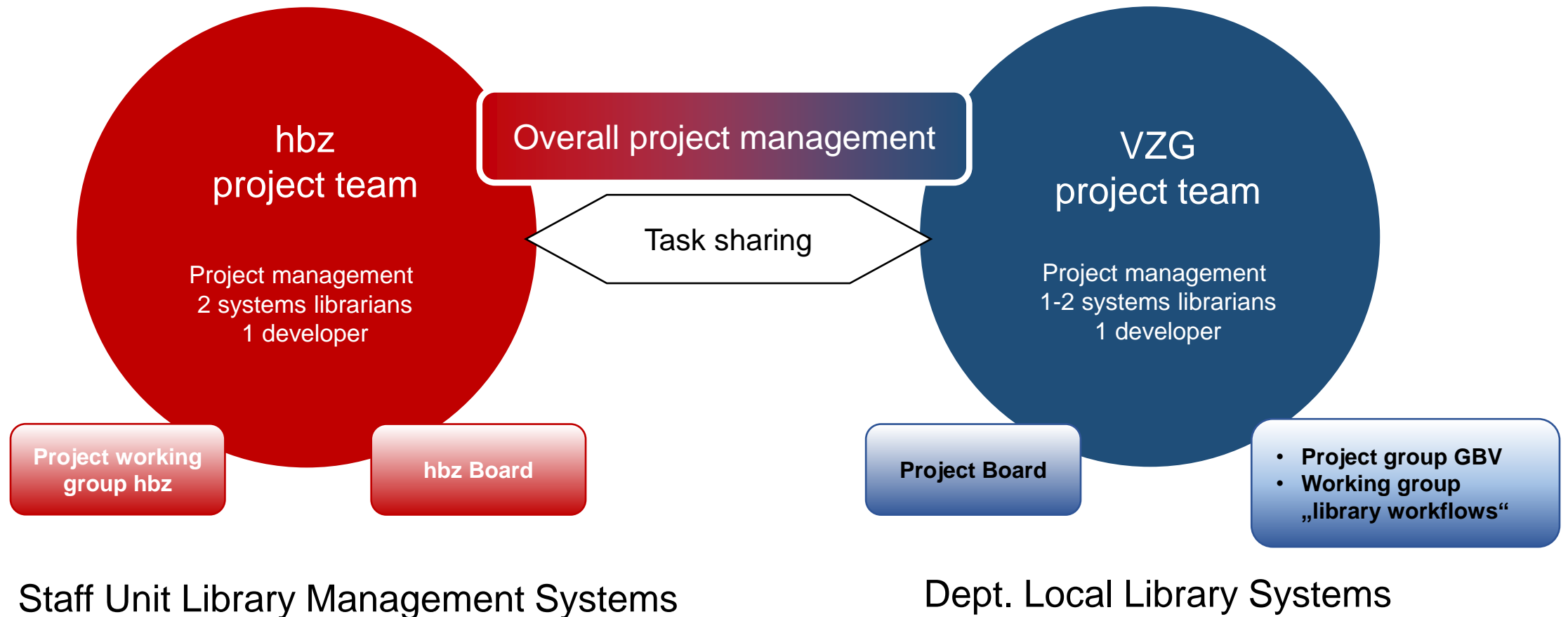
  ➡      Evaluation of Kuali OLE

# Goals

- Qualified statements about functional and technical suitability of OLE – independent information for libraries

- Requirements Catalogue for evaluation of new generation LMS

- Building up independent knowledge about new generation LMS

- Reuse tools and experiences for the evaluation of other LMS than OLE

# Project Cooperation



hbz
project team

Overall project management

VZG
project team

Task sharing

Project management
2 systems librarians
1 developer

Project management
1-2 systems librarians
1 developer

Project working group hbz

hbz Board

Project Board

- Project group GBV
- Working group „library workflows"

Staff Unit Library Management Systems

Dept. Local Library Systems

# Cooperation hbz and VZG

- Shared evaluation
  - Very complex task (knowhow, implementation, configuration)
  - Integration in different technical and organizational infrastructures
- Shared project organisation
  - Cooperative scheduling and task management
  - Tools (project Wiki, JIRA etc.)
  - Workshops and webinars
  - Audio conferences and mailing list

# Financials

- Project hbz
  - Resources of hbz
  - Project funding: Ministry of Innovation, Higher Education and Research of North Rhine-Westphalia

- Project VZG
  - Resources of VZG
  - Project funding by GBV libraries (voluntary)

# Milestones

# Milestone 1 - Infrastructure

- Installation of a cross-network project infrastructure

- Implementation of 3 test machines each in hbz and VZG
  - http://ole.gbv.de/
  - http://kuali.hbz-nrw.de/

- Building up functional and system administrative knowledge
  - Joint configuration workshop with HTC (OLE software developer) in May 2014
  - Translation of manuals and documentations

- Project webside: http://www.ole-germany.org

# Milestone 2 – Test installation and configuration

- Data conversion, data import & configuration
  - UB Hildesheim (VZG), UB Wuppertal (hbz)
  - Dummy user data
  - Title, holding and item data

- Configuration of circulation and acquisition
  - e.g. locations, user rights, circulation regulations, budget structure

# Milestone 3: E-Resources

- Knowledge build-up: Global Open Knowledgebase (GOKb) / KB+

  - Webinars and test accounts: GOKb and KB+
  - GBV tests in the context of the German ERMS Project (DFG)

- GOKb http://gokb.org/

  - Knowledgebase for Kuali OLE since V. 2.0 (Q.3 2015)
  - Contains all global data to maintain e-journals (planned: e-books, data bases)
  - Community management and maintenance

# Milestone 4: Discovery

- Integration of OLE with DigiBib and VuFind

- Search & display title data

- Display item data including availability

- OPAC and account functionality

  - Reservations, orders, renewals, cancelations
  - User account status display

# Milestone 5: Requirements Catalogue

- Requirements catalogue „Next Generation System" for academic libraries in Germany

- Survey of existing requirements catalogues
  - Recent catalogues only from Anglo-American region

- Verbalization and editing of the requirements
  - Consolidation and translation
  - Editorial revision (work in progress)

# Milestone 6: DFG Funding Application

- DFG (=German Research Foundation) application for funding of hbz/VZG, November 2014 (work still in progress)

- Preparations for a pilot installation in Germany
  - Adjustments to German requirements (e. g. ILL)
  - Integration in hbz and GBV network workflows (e.g. update mechanisms to union catalogues)
  - Business model set-up
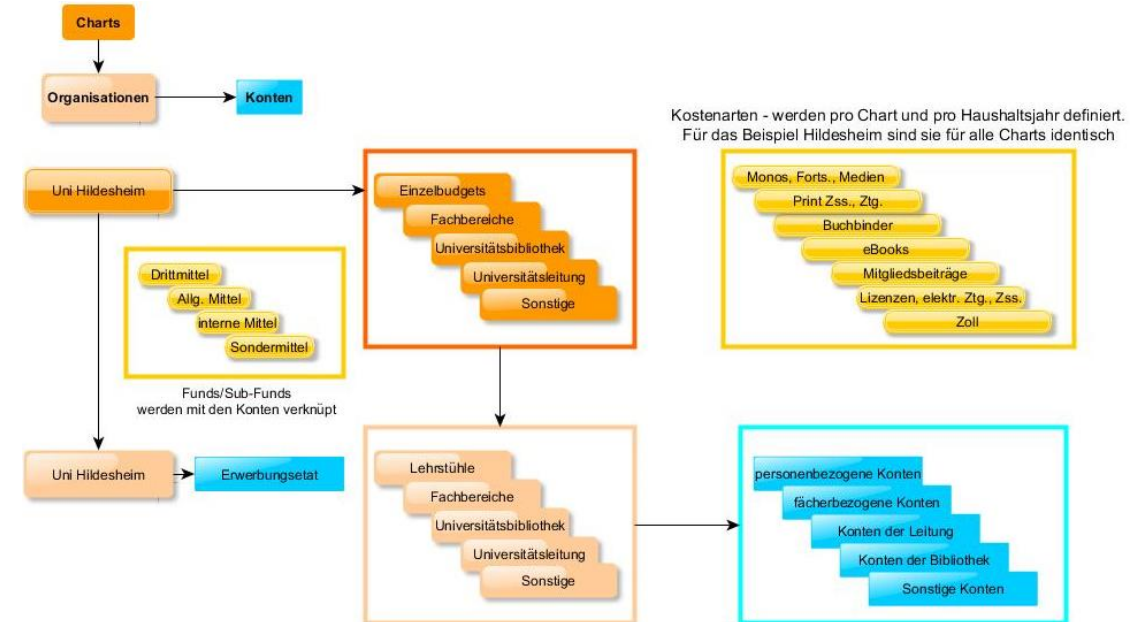
- Project duration: four years (3+1)

# Milestone 7 - OLE Community

- Project meetings with OLE Community
  - GOKb Meeting, London, February 2013
  - LIBER Conference, Munich, August 2013
  - UK Kuali Days London, November 2013
  - German Library Day, Bremen, June 2014
  - Kuali Days 2014, Indianapolis, November 2014
  - LIBER Conference, London, May 2015
  - OLE and GOKb Meeting, London, July 2015

- Talk about cooperation concerning OLE and GOKb

- Participation in OLE Functional Council  (non-voting status)

# Project results

# Project results: Functionality 1

- Meta data management
  - Successful data import and management
  - Authority data control on road map
  - Supported data formats:
    - MARC 21, MARCXML, Dublin Core, OLEML (internal), BIBFRAME (planned)
- Acquisition
  - Extensive functionality
  - Differentiated budget structure possible
  - Management of e-resources (In development: first version in V. 2.0)

# Project results: Functionality 2

- Circulation
  - Functionality mostly complete
  - Operation of self-service machines possible
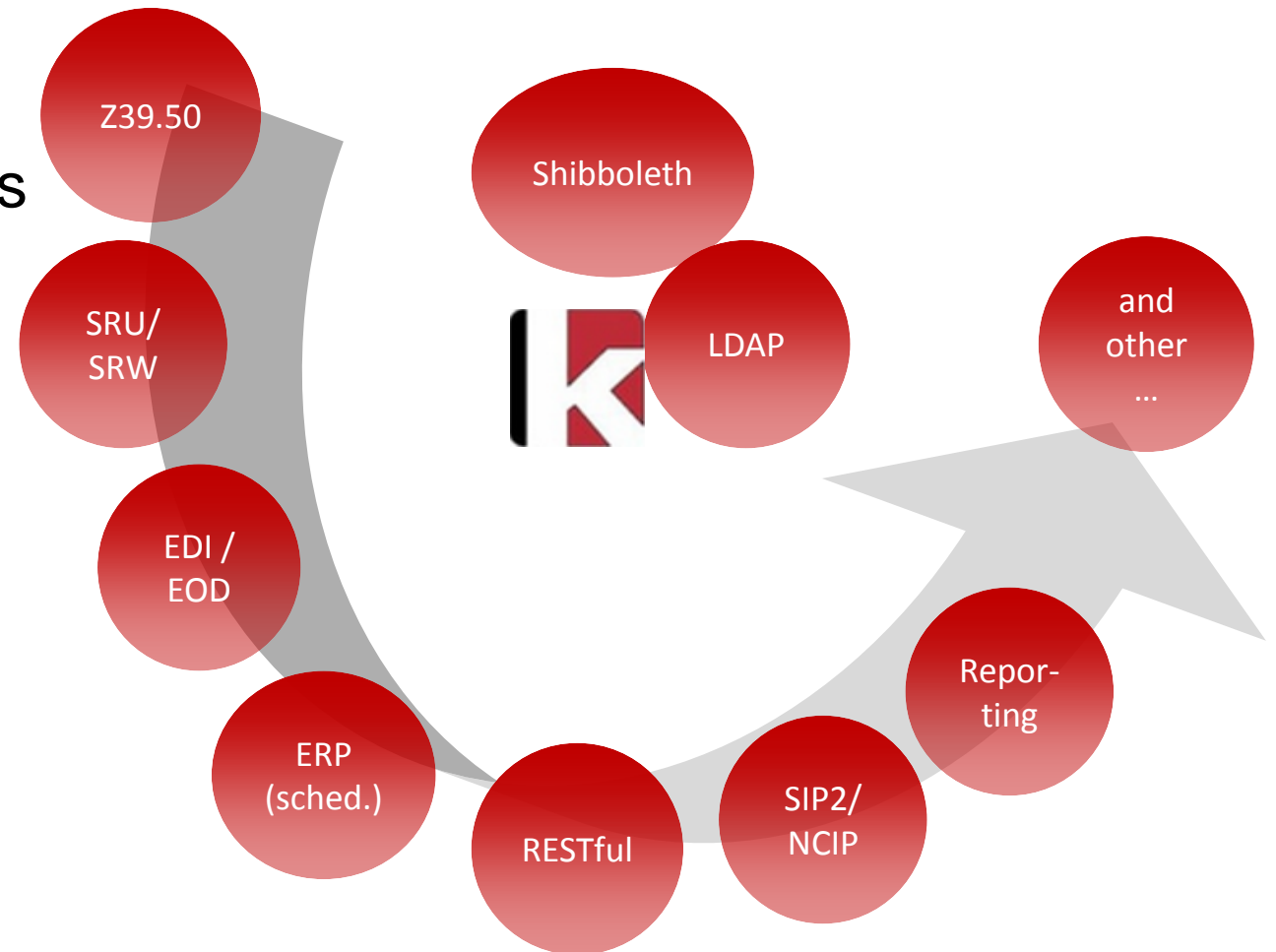  - Ergonomics needs to be improved

| Patron Type / Item Type | | 05 Handapparat | 10 Studierende | 20 Universitätsangehörige | 50 Professoren | 70 Universitätsangehörige HAWK | 80 Externe |
|---|---|---|---|---|---|---|---|
| BUA | Buch ausleihbar | FixedDueDate= 30.09.2015 CP 2 | 30/6x30 CP 1 | 30/6x30 CP 3 | 30/12x30 CP 4 | 30/6x30 CP 3 | 14/6x30 CP 5 |
| AVA | AV ausleihbar | | | | | | |
| BUZ | Buch mit Zustimmung ausleihbar | | | | | | |
| AVZ | AV mit Zustimmung ausleihbar | | | | | | |
| BUP | Buch präsenz | | Nicht ausleihbar | | 7 CP 6 | Nicht ausleihbar | |
| AVP | AV präsenz | | | | | | |
| ZSP | Zeitschrift präsenz | | | | | | |
| MKP | Mikroform präsenz | | | | Nicht ausleihbar | | |

# Project results: Technique

- Programmed in Java
- Scalable, suitable for high loads
- Open Source enables free choice of cloud provider
  - Licence: ECL 2.0 → AGPL3 (in V. 3.0)
  - Private / community cloud, local installation
  - No vendor lock-In
- Open and transparent software developement and documentation
- Internal development and changes possible
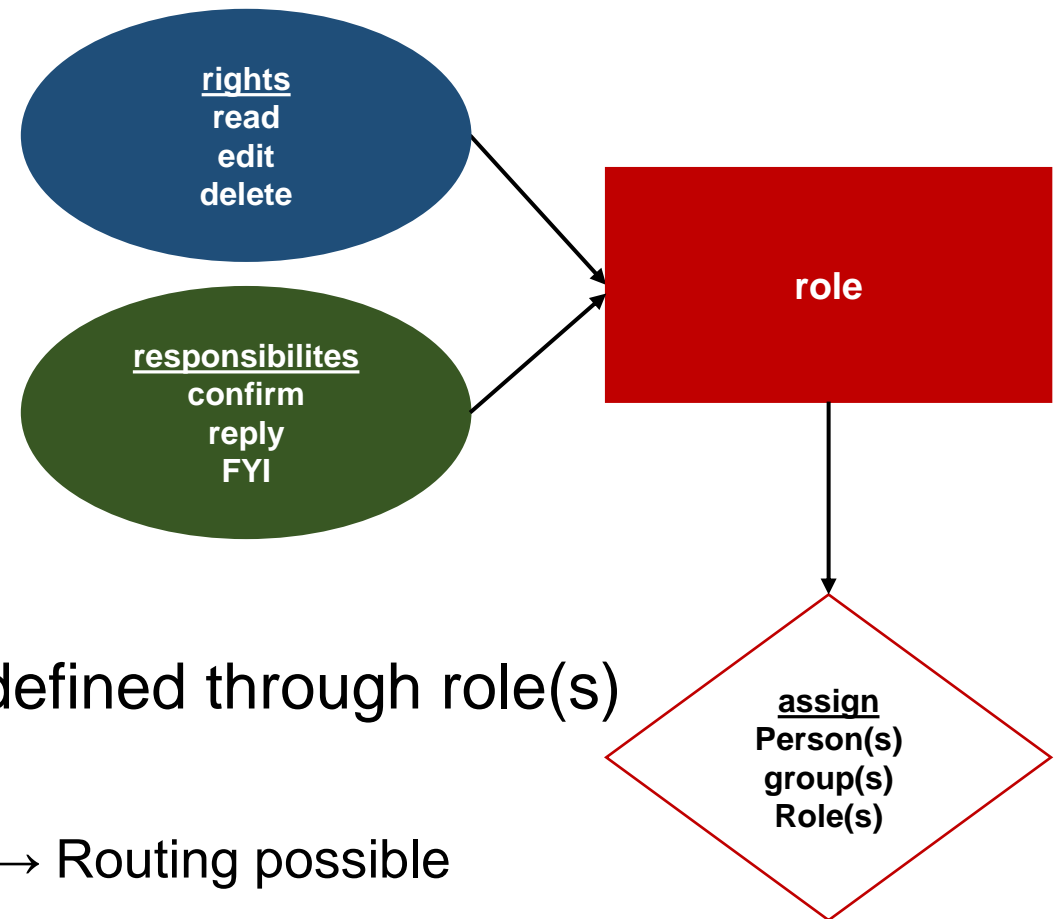- Code quality and documentation needs to be improved

# Project results: APIs

- Integration of 3rd party systems
  - Discovery, availability
  - Circulation: self-check and self-cash machines
  - Meta data management, GOKb (ERM)
  - Acquisition: book trade data
  - Financial system (e.g. of the University) (ERP) - planned
  - Statistics
  - Identity management

# Project results:
# Rights Management



- OLE assigns one or more role(s) to each user

- Rights definition and responsibilities are defined through role(s)

- Rights are static
  - Responsibilities are workflow-based actions → Routing possible

- Roles and rights configuration needs to be simplified

# Project results: Community

- partner libraries of significant size and functional scope
- Development control
  - OLE Board, Functional Council, Technical Council, Subject Matter Expert Groups (SME's)
- Reliable and quick response
- Openness in discussions, goal-oriented proceeding
- Successful cooperation with commercial software developer (HTC)

# Project result until now

- Integration of OLE
  - in existing and new German network structures
- Connection with any external data source possible
  - Pica CBS, Aleph union catalogue, WorldCat, Alma
- Improvement needed in technical architecture, software quality and documentation
- Functionality needs to be completed as planned
- Improvement needed in user interface and ergonomics
- After adjustment to German requirements →

✓ OLE has potential for German academic libraries

# Project prospect

# Project – next steps

- More testing (functional and technical) of OLE (version 2.0 and following)

- Enhancement of the test implementations

- Intensify and enhance the cooperation with OLE community

- Discussing the criteria catalogue with experts
  - Project group GBV, working group „library workflows"
  - Project working group hbz, internal and external experts

- Test of GOKb

- Publishing of the evaluation results

# Prospect – OLE live

- hbz and VZG becoming OLE partners

- Implementation of OLE in two German pilot libraries

- Cost estimate for adaption and enhancements of OLE for German libraries

- Hosting of OLE in hbz/VZG private cloud

- Possible options for OLE service
  - Integration in our existing network data workflows, union catalogues (medium-term)
  - Connection of OLE to data sources (e. g. WorldCat, Alma)

# Thank you.

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