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** = Hochschulbibliothekszentrum des Landes Nordrhein-Westfalen / Library Service Centre of North Rhine-Westphalia
  - Situated in Cologne, NRW
  - Staff: ca. 85 FTEs
- **VZG** = Verbundzentrale des Gemeinsamen 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

**GBV | VZG**

**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

**hbz**

**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
- Project management
- 2 systems librarians
- 1 developer

Overall project management

VZG project team
- Project management
- 1-2 systems librarians
- 1 developer

Task sharing

Project Board

Project working group hbz

hbz Board

Staff Unit Library Management Systems

Dept. Local Library Systems

- Project group GBV
- Working group „library workflows“
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 website: 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/](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
  - 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
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 development 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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