



Kuali OLE – A Next Generation Library Management System

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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 – Partners



INDIANA UNIVERSITY



EBSCO



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

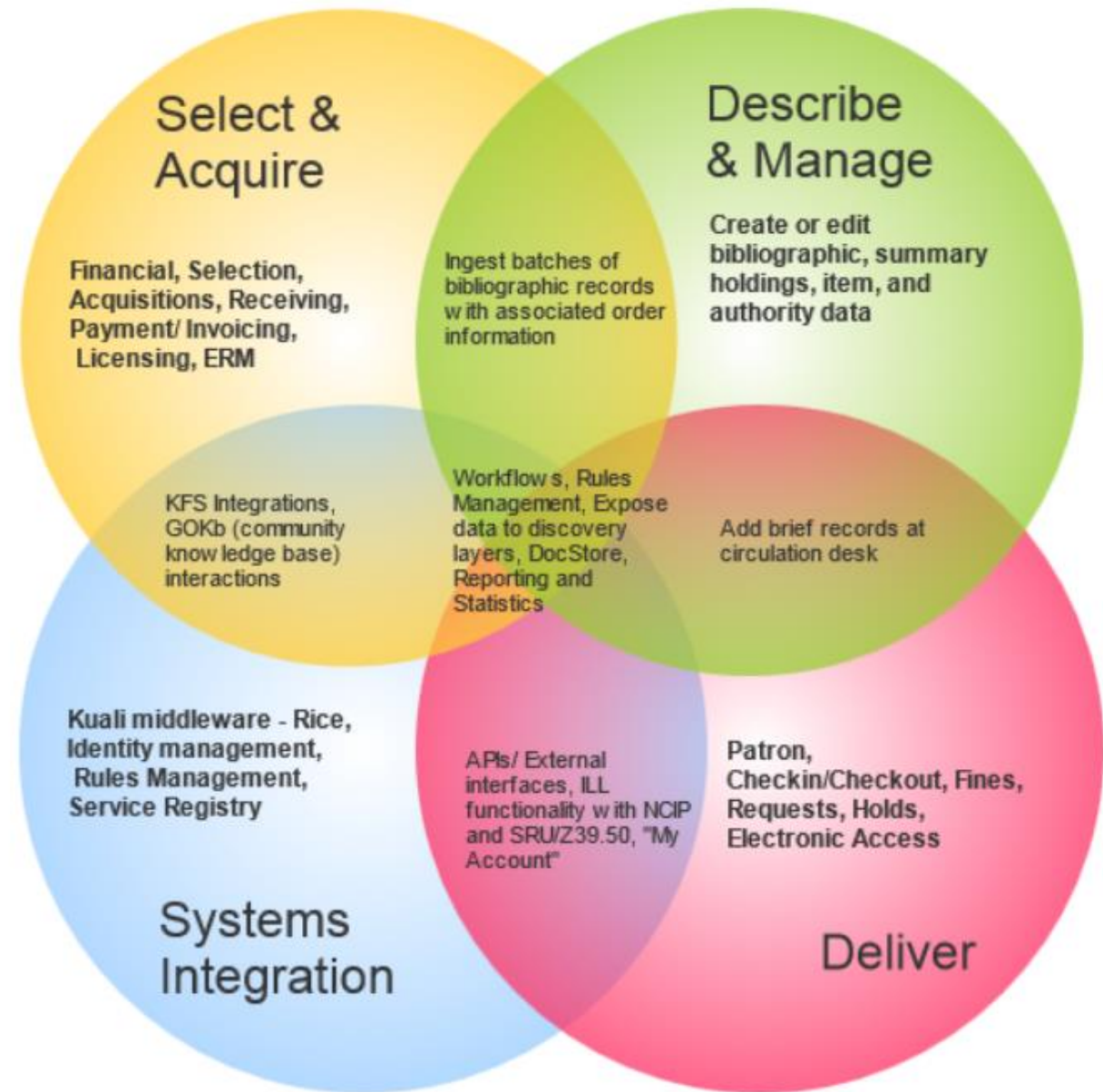
Cooperation

- 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

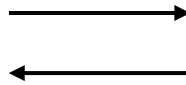


Quelle: <https://www.kuali.org/ole/modules>, 2015-08-17

Data Storage

I^kuali DocumentStore

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

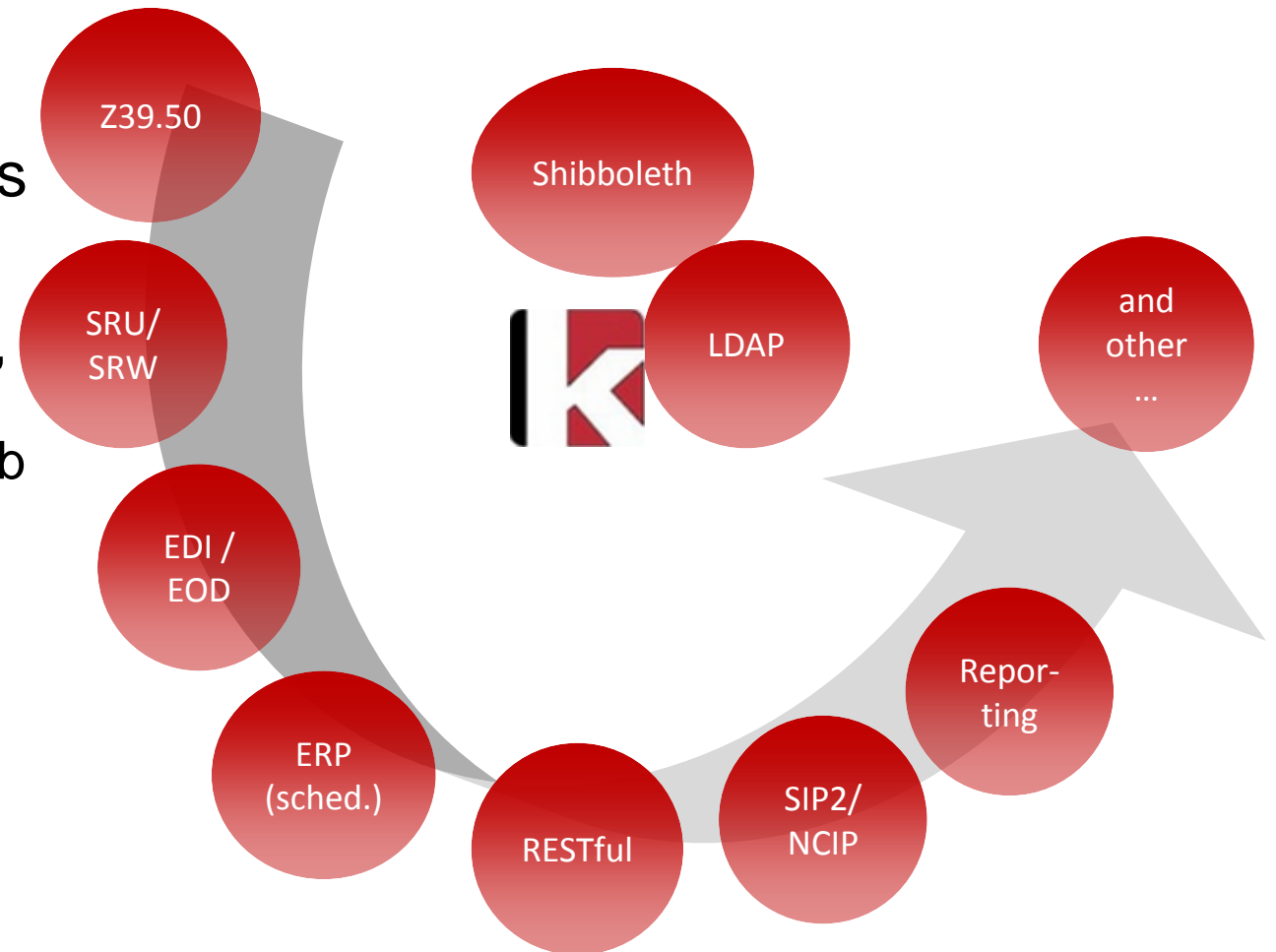


GOKb Global Open Knowledgebase

- 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

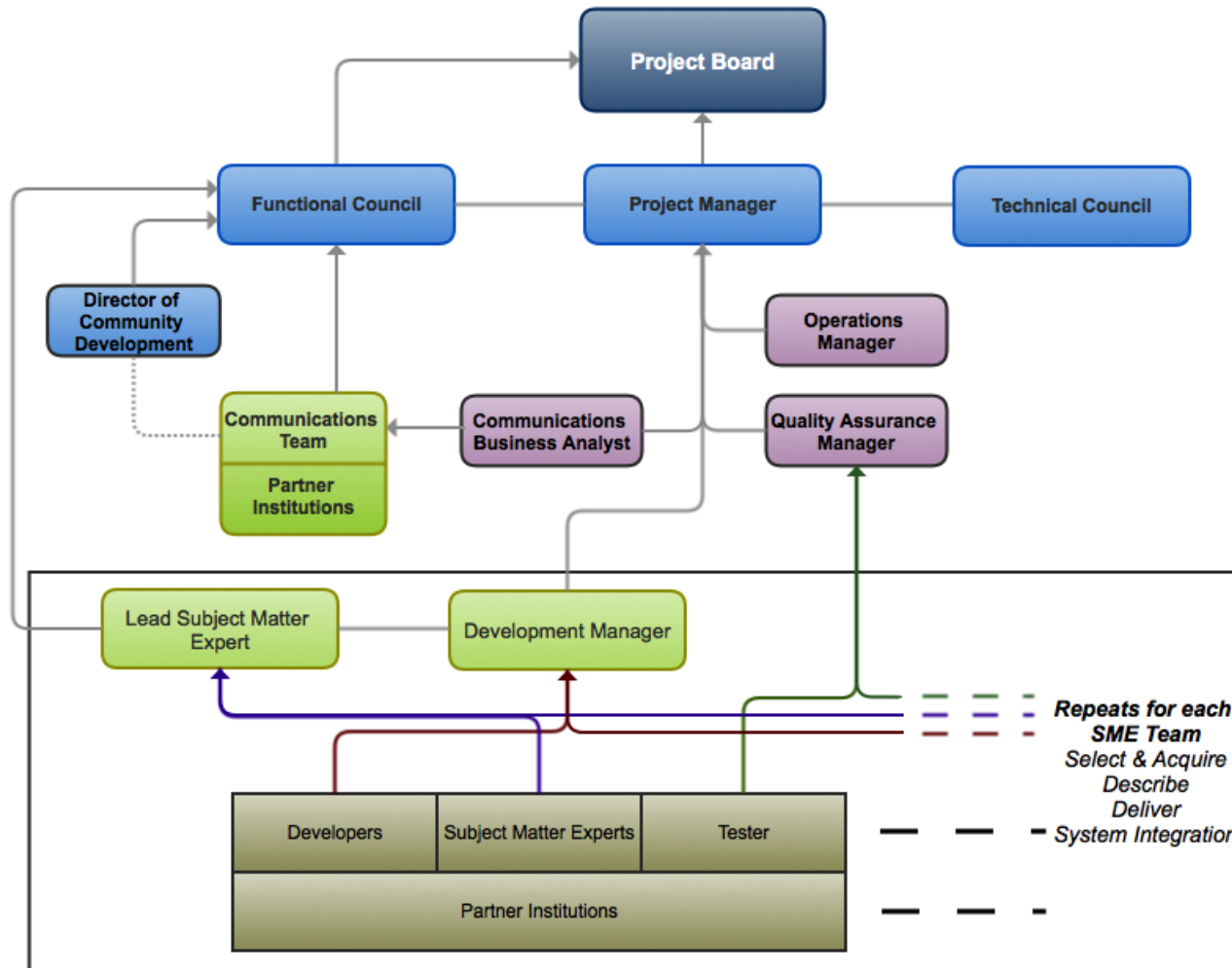


Software Development

Software Development - Controlling

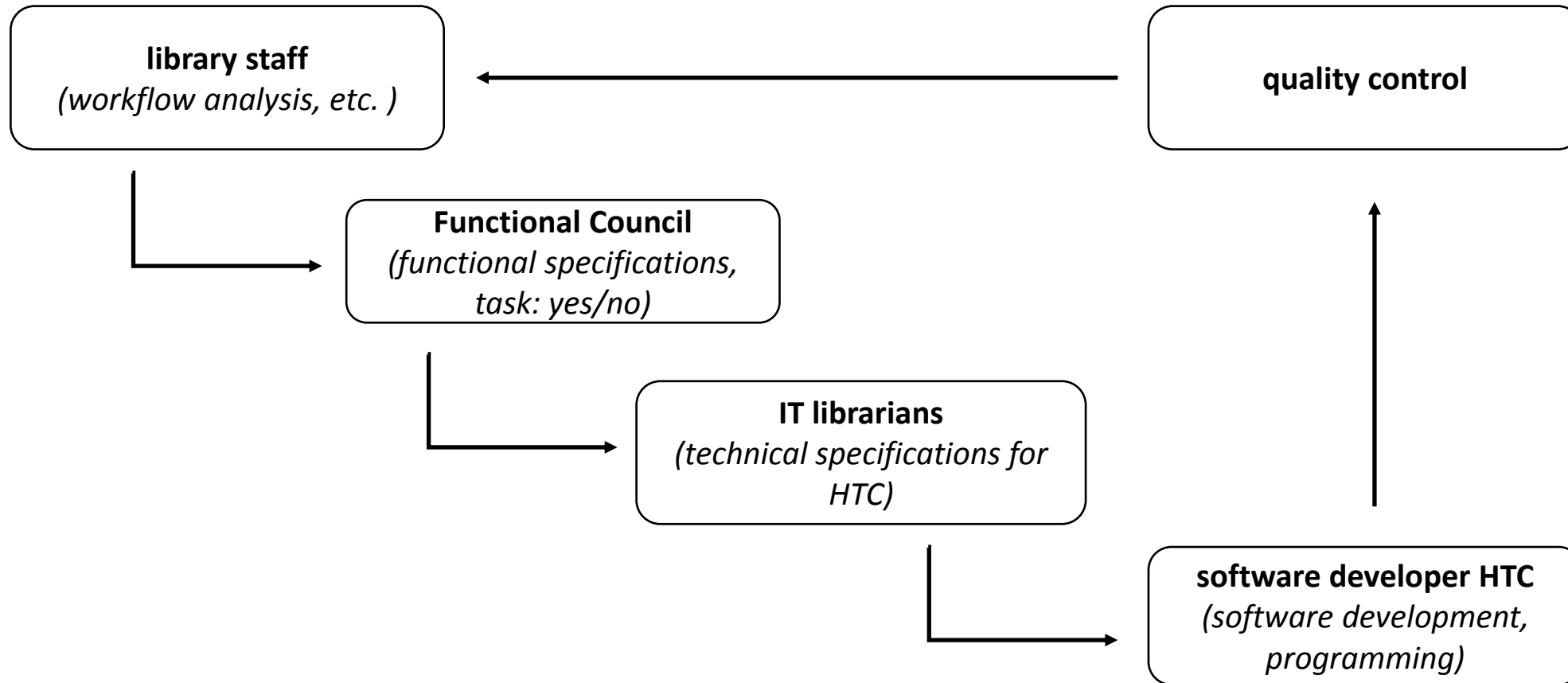
- Controlling of software development by partners
 - OLE Board
 - Functional Council and Technical Council
- Software development by commercial affiliate
 - Intention: e.g. consistent development, sustainability, professional knowhow
- Internal development possible

Software Development - Organization



Quelle: <https://www.kuali.org/ole/organization>, 2015-08-17

Software Development - Process



Perspective

Kuali OLE - Roadmap

OLE Version	Date	Functionality
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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