AN UPDATE ON KUALI OLE

Bibliothekartag 2014 – Bremen
Michael Winkler – University of Pennsylvania
QUESTIONS ABOUT KUALI OLE (KOLE)

- What is Kuali OLE?
- What does Kuali OLE do and when?
- What is next for KOLE?
- How do I get involved with KOLE?
SO, WHAT IS KUALI OLE?
KUALI OLE IS A COMMUNITY

- A community within a community
  - Part of the Kuali Foundation – Building software and community for Higher Education
  - 77 Members, 8 Projects, 12 Commercial Affiliates
  - Nearly 1000 people involved
  - A legal entity and a philosophy

- Kuali OLE Partners
  - Software designed by Librarians for Libraries to serve users
  - 10 institutions, 5 KCAs & affiliates, GOKb
  - 50+FTE including architects, coders, designers, SMEs, testers, and documenters
  - Funded by the Partners and the Andrew W Mellon Foundation
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 OLE IS SOFTWARE

- Enterprise Java with services middleware
- Built to integrate & interoperate
- A platform for development
- Designed for libraries by librarians!
- Web services APIs
WHAT DOES KUALI OLE DO & WHEN WILL IT DO THAT?
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

FUNCTIONAL ARCHITECTURE – DESCRIBE

- Describe – [http://www.kuali.org/ole/modules/describe-manage-entity](http://www.kuali.org/ole/modules/describe-manage-entity)
FUNCTIONAL ARCHITECTURE – DELIVERY

FUNCTIONAL ARCHITECTURE – SYSTEMS INTEGRATION

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

### OLE Release 1.5

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<th>Jira No.</th>
<th>Jira Summary</th>
<th>Orig Dev Estimate</th>
<th>1.5 Dev Hrs</th>
<th>Dev Hrs Remain</th>
<th>Dev Hrs Used</th>
<th>Comments on Status</th>
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**Fields:**
- Jira No.: Unique identifier for the Jira ticket.
- Jira Summary: Description of the Jira ticket.
- Orig Dev Estimate: Original development estimate.
- 1.5 Dev Hrs: Hours estimated for the task.
- Dev Hrs Remain: Hours remaining for the task.
- Dev Hrs Used: Hours already used.
- Comments on Status: Additional notes or comments.
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
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!!!
**KOLE IMPLEMENTATION PROCEDURES**

- Start up KOLE instance
  - Define deployment option
  - Analyze institutional data required to populate
  - Create and bootstrap local instance of OLE
- Select & Acquire Data
  - Prepare Chart of Accounts
  - Populate vendor file
  - Load continuations and open orders
  - Load serials holdings
- Describe Data
  - Extract and map Bibliographic & Instance DocStore Data
  - Load DocStore data using loader templates
KOLE IMPLEMENTATION PROCEDURES

- **Deliver Data**
  - Extract & map patron and circulation history data
  - Load Circulation history data
  - Create circulation policies
  - Input and test Deliver parameters

- **Systems Integration**
  - Integrate with Identity Management System
  - Determine Roles & Permissions
  - Select and implement discovery layer of choice

- **Set up services reporting**

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<agendas>
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    <!-- General Checks: rules to validate Patron (generalBlock, expiration date, address, barcode, and, if proxy, a rule for proxy expiration date check)-->
    <name>General Checks</name>
    <rules>
      <rule>
        <!-- GeneralBlock: if generalBlock=true then display error message-->
        <name>isGeneralBlock</name>
        <oleProposition>
          <!-- if generalBlock=true-->
          <type>simple</type>
          <simpleProposition>
            <term>
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              <value>generalBlock</value>
            </term>
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            <values>
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              </value>
            </values>
          </simpleProposition>
        </oleProposition>
        <trueActions>
          <!-- then display error message-->
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            <parameter>
              <name>errorMessage</name>
              <value>This patron has a general block</value>
            </parameter>
          </action>
        </trueActions>
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    </rules>
  </agenda>
  <!-- PatronMembershipExpirationDate: if patron expiration date
  expires on or before today then display error message-->
  <rule>
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    <oleProposition>
      <!-- if patron expiration date expires on or before today-->
    </oleProposition>
    <trueActions>
      <!-- then display error message-->
    </trueActions>
  </rule>
</agendas>
```
WHAT IS NEXT FOR KOLE?
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
KOLE OPTIONS – DEPLOYMENT

**OLE Hosted Option**
- Using a KCA, 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 relies on the Kuali OLE community and/or KCAs for support & 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
HOW DO I GET INVOLVED WITH KOLE?
WAYS TO PARTICIPATE

- Join the KOLE Community!
  - Determine your future
  - Invest within your community
- Be an adopter!
  - Gain benefits of community source
  - Provide value and feedback
- Be a Subject Matter Expert!
  - Define use cases
  - Write specifications
- Be a developer!
  - Sustain the software
  - Create new capabilities
QUESTIONS?

Follow us!

- Web: http://ole.kuali.org
- Twitter: @kualiole
- Blog: http://kualiole.tumblr.com
- Me: winkler4@upenn.edu