Kuali OLE: A Next-Generation ILS Partnership

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http://ole.kuali.org
What is Kuali OLE?

Kuali OLE (Open Library Environment) is a community source next-generation library management system developed through a partnership of research libraries with the Andrew W. Mellon Foundation.

OLE is building a next-generation library system meeting the following requirements:

- Flexibility in design
- Community ownership based on an open source license
- Service-Oriented Architecture with a modular framework
- Enterprise-level integration
- Efficiency in ability meet both current and future business needs
- Sustainability in design to allow for the evolution of software, hardware, and mission
What is Kuali OLE?

Kuali OLE (Open Library Environment) is also an open partnership among academic libraries to provide for our evolving needs.
OLE: Participation and Sustainability
Kuali OLE Characteristics

- Java
- Cloud Ready
- Service-oriented architecture
- Enhanced Discovery Services

- Support for essential workflow
- Choice for discovery and other services

- Community and Commercial support

- Supportive of research university scale

- Integrated & Independent

- Open source

- Enterprise caliber

- Java
- Cloud Ready
The Kuali Foundation and OLE
Kuali OLE Organization

Vision & Resources
- Kuali OLE Board
- Functional Council
- Community
- Communications

Functionality & Scope
- HTC Coordinator
- Project Manager
- Core Team

Coordination
- HTC Global Resources
- Consultants

Development
- Describe
- Deliver
- Select & Acquire
- System Integration
- Subject Matter Experts
OLE Collaborators

JISC collections
EDItEUR
kuali foundation
HTC global services
VIVANTECH
blacklight
EBSCO Discovery Service
vufind

The Andrew W. Mellon Foundation
EBSCO and Kuali form a tight relationship to offer seamless interaction between the leading discovery solution—EBSCO Discovery Service—and the high-end, open source ILS—Kuali OLE.
The Current ILS

So, the ILS helps libraries manage...

- deliver
- discover
- store
- acquire

Public Catalog

Staff Interfaces
The Next Generation Library Eco-System

So, the ILS helps libraries manage...
The Global Open Knowledgebase (GOKb)

• Andrew W. Mellon Grant, April 2012-March 2013
• Knowledgebase for Kuali OLE
• Build a Global Open Knowledgebase (GOKb) that will be community maintained
• Focus on data management and integration services
GOKb Key Deliverables

• Open knowledgebase using a standards-based architecture, CC0 license
• Enhanced global data elements
• APIs to interact with data—emphasis on ingest and maintenance
GOKb, KB+ and Kuali OLE

• Kuali OLE building a community source library management system
  • Mellon commissioned a feasibility study, 2008-9
  • Funded build project, 2010-14 : $4 million from Mellon, $4 million from partners
• GOKb Version 1.0 – basic functionality of GOKb by 2013.
In Transition: The Current Library Management System Landscape

Systems of Libraries Considering Migration 2013

- Voyager
- Millennium
- Horizon
- Aleph
- Virtua
- Symphony
- Evergreen
- Polaris
- Apollo

In Transition: The New Library Management System Landscape

Candidate Systems Considered for 2013

- Alma
- Intota
- Sierra
- WMS
- Kuali OLE
- Koha
- Evergreen
- Symphony
- Polaris

Key Kuali OLE Release Information

• April 2014 1.5
  • Complete baseline ILS: functionality across 4 of 5 modules
  • First upgradeable release

• 4Q 2014: 2.0
  • Electronic Resource Management (GOKb e-Resource knowledge base integration)
  • Critical features for the next wave of partner implementations
Kuali OLE 1.5 Interface
Kuali OLE Release 2.0: Q4 2014

Select
Acquire
Describe
Deliver
Manage
OLE Partnership Implementation Timeline

Implementation Path for OLE Partners

- Summer 2014: Lehigh University
- University of Chicago
- Summer 2015: Bloomfield College
- Duke University
- University of Pennsylvania
- Summer 2016: North Carolina State University
- Villanova University
- Indiana University
- Winter 2015: Florida Consortium
- University of Maryland
- Winter 2016:
Characteristics of Kuali OLE Organizational Fit

- **Technical Expertise**
  - Build
    - Active contributors to code base
    - Significant development resources in house
  - Borrow
    - Capability to adopt and implement open source software
    - Some development resources in house
  - Buy
    - Organizational requirement to purchase commercial software or software with commercial support
    - Development and hosting support for OLE available via KCA Commercial Affiliates (HTC Global, Vivantech)
Kuali OLE A Rocky Mountain View

- What do I Install First?
  - Discovery Layer
  - Other Integrations
    - Financial
    - Student
    - Interlibrary Loan
    - ILL/Resource Sharing
    - Self-check
- What data do I Migrate?
  - Descriptive Metadata (MARC->MARCXML/DC)
  - Financial Data/Transaction Data
- What kind of expertise do I need to participate?
- Will it run in the cloud?
- Can I run it in the local CARL or University Infrastructure?
Implementation and Purchasing for Kuali OLE

**OLE Hosted Option**
- Using one of our two KCAs 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 would rely on the Kuali OLE community for support and 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.
TO RFP OR TO PROTOTYPE

DEVELOPING PROCUREMENT OPTIONS FOR COMMUNITY SOURCE SOFTWARE
KUALI OLE
OPEN AND TRANSPARENT
CLOUD HOSTING SERVICES
PROTOTYPE TO PRODUCTION
Purchasing Recommendations

• OLE can respond to RFI/RFP Processes
• We recommend a Prototype Process (Used for Large Complex Systems Purchasing)
  • Develop prototype with our software
  • Test your own data in the environment
  • Limit spending to 10% of your eventual implementation budget (approx 50-60K)
• Use commodity cloud resources to eliminate startup hardware costs
• Determine if Kuali OLE is right for you:
  • Community
  • Software
GO FOR IT
ENABLE OPEN SOLUTIONS FOR YOUR INSTITUTION
### OLE Costs and Sustainability

**Current buy-in: 100k/80k for over/under 20 million in library expenditures**

**Growth:** low = no change (10 partners), mid = 1 new member, high = 2 members

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CARL Next Generation ILS Conference
April 4, 2014

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For more on Kuali OLE:

Visit our website: http://ole.kuali.org
See our Test-Drive - http://kuali.org/test-drives
Visit GOKb: http://www.gokb.org

Follow us on Twitter: @kualiole
Read our Blog at: http://kualiole.tumblr.com
Follow us on Ohloh - https://www.ohloh.net/p/kole

Contact me at: rhmcdona@indiana.edu
Or Twitter at: @mcdonald