

Kuali OLE Project Update

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LIBRARIES

INDIANA UNIVERSITY
Bloomington



Outline

- Kual: What and who?
- OLE: What and who?
- OLE: Progress to date and previous releases
- OLE 0.6 screen shots
- OLE: Future releases
- OLE: Tentative implementation schedules
- OLE and GOKb
- OLE technologies
- Comparison with other “next gen” systems



Kuali: What it is, who it is

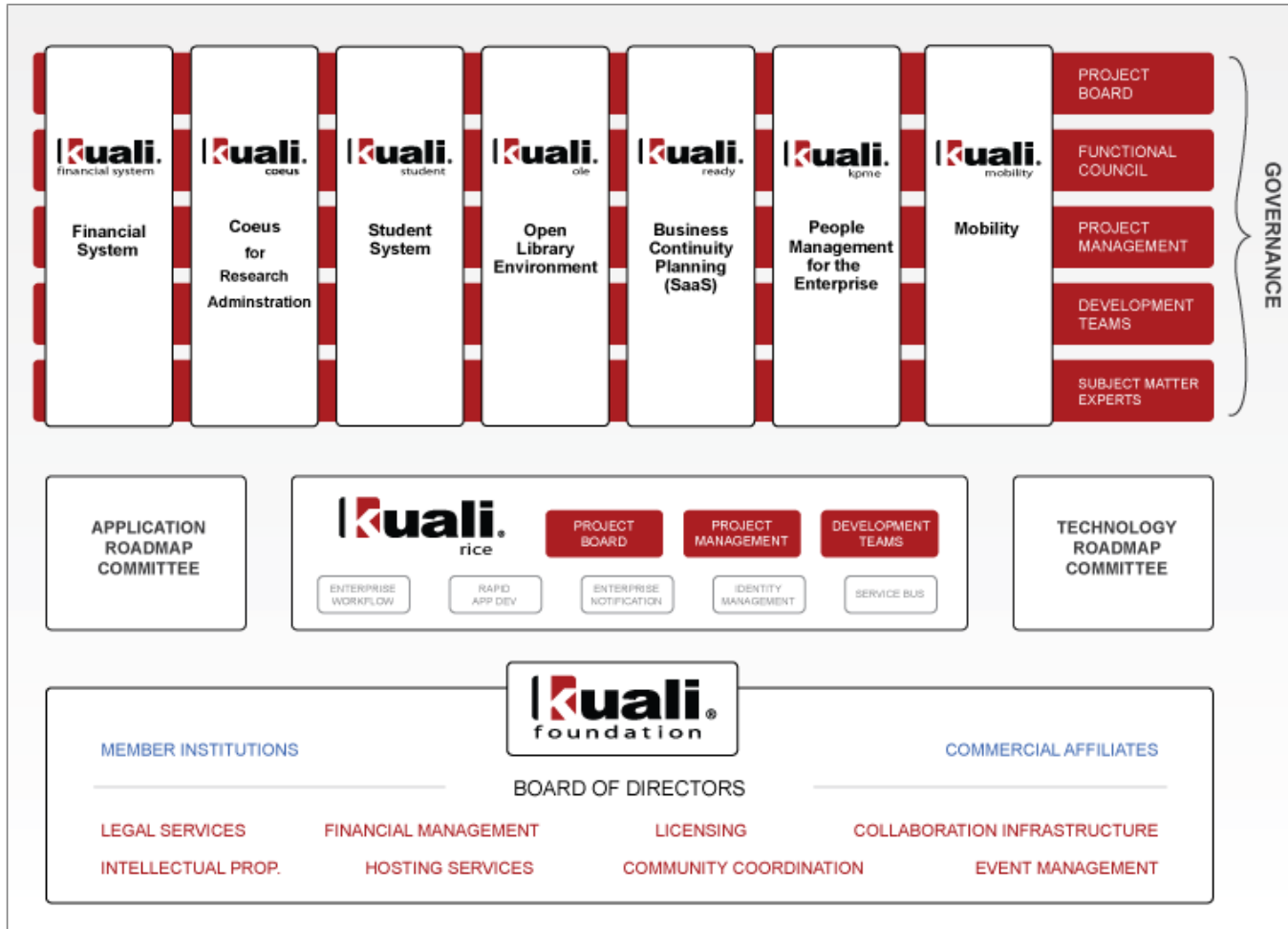
- A cooperative organization of schools of higher education under the overall management of the Kuali Foundation
- Purpose: To develop community-source software for higher education that can be used in place of vendor-supplied software
- Currently consists of a number of “projects” and 72 members
- Not all members participate in all projects



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kuali. Open Source Administrative Software.
By higher education, for higher education.

Organizational Chart





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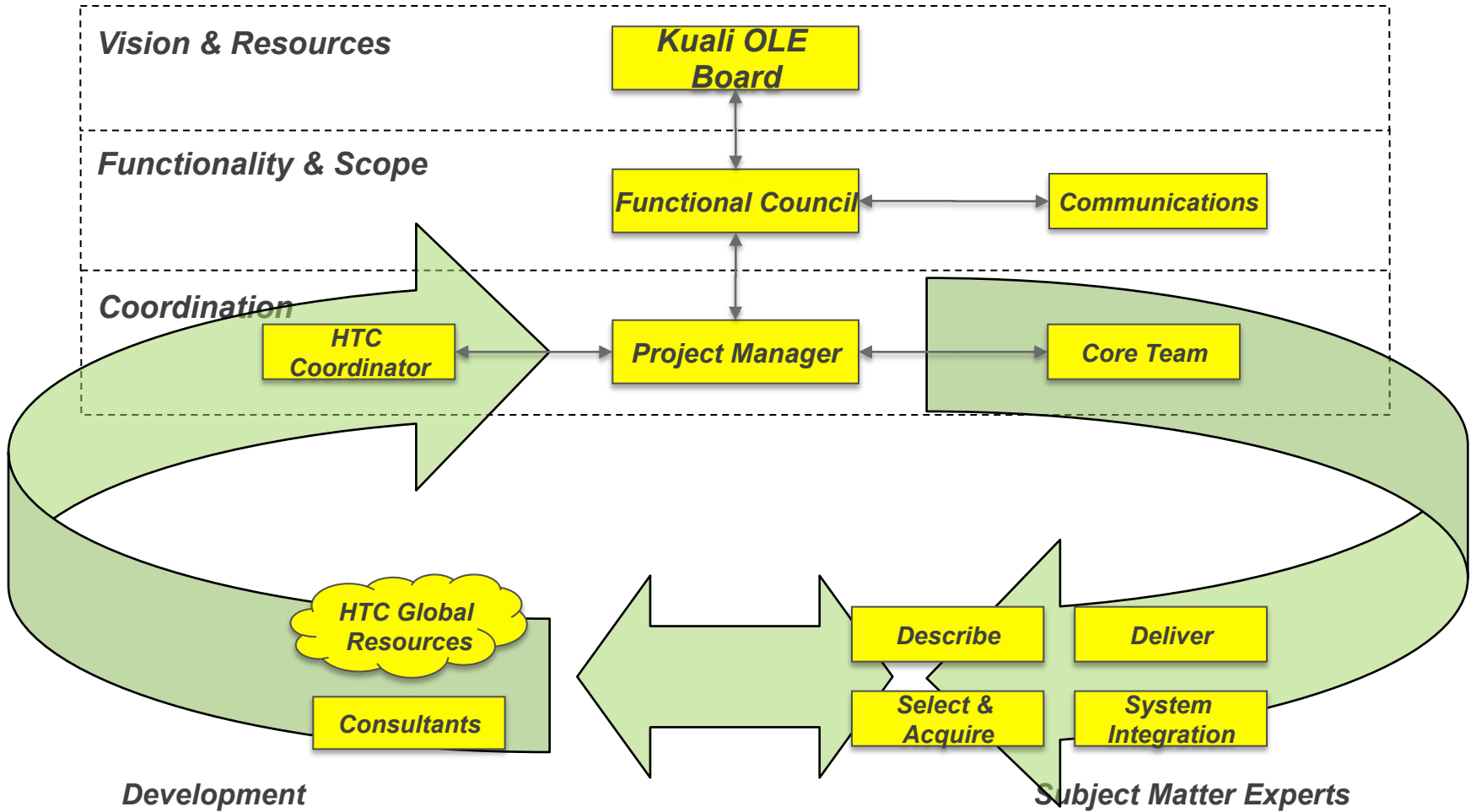
VILLANOVA UNIVERSITY



The Andrew W. Mellon Foundation



Kuali OLE Organization





OLE: What It Is

- A community source “back end” for library internal processes:
 - Acquisitions
 - Cataloging
 - Circulation



OLE: What It Isn't

- An OPAC
- Each OLE partner will choose an implement an existing open source OPAC (VuFind, Blacklight, etc.) running against its data in OLE.
- IU is implementing Blacklight



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IU Project Participants

OLE Project Leadership & Outreach:

Kuali OLE Board

- ❖ Dean Brenda Johnson

Director, Kuali OLE Community Development

- ❖ Robert McDonald



IU Project Participants (con' t)

Functional Council

- ❖ Gary Charbonneau
- ❖ Mechael Charbonneau

Technical Council

- ❖ Mark Feddersen
- ❖ John Pillans



IU Project Participants (con' t)

Select/Acquire SME Group (Acquisitions)

- ❖ Michael Charbonneau (Member)
- ❖ Spencer Anspach (Ingest/Load)
- ❖ Jackie Byrd (Ingest/Load)
- ❖ Lynda Clendenning (Budget)
- ❖ Lisa Lent (Receive Resource)
- ❖ Jennifer Lewis (Receive Resource)
- ❖ Kay Martin (Budget, Pay for Item)
- ❖ Pam Owens (Serials Check-in, Tester)



IU Project Participants (con' t)

Deliver SME Group (Circulation)

- ❖ Gary Charbonneau (Member)
- ❖ Randy Lent (Member)
- ❖ Keith Welch (Member, Tester)
- ❖ Julie Hardesty (User Interface)
- ❖ Rita Rogers (ILL)



IU Project Participants (con' t)

Describe/Manage SME Group (Cataloging)

- ❖ Mechael Charbonneau (Lead SME)
- ❖ Gary Charbonneau (Lead SME)
- ❖ Jackie Byrd (Member, Tester)
- ❖ Spencer Anspach (Authority Control White Paper)
- ❖ Steve Hendren (Authority Control White Paper)
- ❖ Andrea Morrison (Classification Schemas)



IU Project Participants (con' t)

Other OLE Groups and/or Roles

- ❖ Jackie Byrd (User Stories, Describe Basic)
- ❖ Lynda Clendenning (KFS Fit Analysis)
- ❖ Gary Charbonneau (Instance Editor)
- ❖ Mechael Charbonneau (Workflows)
- ❖ Diane Dallis (Communications)
- ❖ Lori Duggan (User Stories, E-Resources, Communications)
- ❖ Mark Feddersen (Scope, Systems Integration)
- ❖ Robert McDonald (Communications, GOKb, KFS)
- ❖ John Pillans (Editors, Configuration Manager)



OLE@IU Communications Team

The OLE@IU Communications Team was formed to encourage understanding and promote awareness of Kuali OLE development and implementation at IU.

- ❖ Lori Duggan, Co-Chair (IUB)
- ❖ Courtney Green, Co-Chair (IUB)
- ❖ Robin Crumrin (IUPUI)
- ❖ Marla Baden (IPFW)
- ❖ Angela Thorpe (IUK)



OLE@IU Blog

Watch for periodic posts on developments, news items, or upcoming events regarding the Kuali OLE project at IU. The blog contains a fact sheet as well for quick reference.

<https://blogs.libraries.iub.edu/ole/>



OLE: Start-Up Phase (July 2010-Apr. 2011)

- Hired and engaged OLE Core Team
- Signed software development contract with HTC Global Services
- Set initial development timelines
- Formed teams to write functional specifications
- First prototype (OLE version 0.2) demo spring 2011



OLE 0.3 (Nov. 2011)

Implementation of Core Technologies

- **Acquisitions:**
 - Use of Kuali Financial System (KFS) version 4 as core
 - Extensive library business process analysis
 - Use of Kuali Rice 1.1 for workflow
 - Supply chain automation
 - Vendor firm order ingest
 - Manual invoice entry
 - Enhanced pre-order selection
 - Support for purchase of discrete items:
 - Requisitions
 - Purchase orders
 - Encumbrances
 - Receipts



OLE 3.0 (cont' d)

- **Cataloging**
 - Use of *Apache Jackrabbit* document repository (“docstore”) for storing metadata
 - Support for multiple descriptive metadata formats (initially, MARC & Dublin Core)
 - Definition of document types
 - Test loading of 5 million bibliographic and 5 million item records
- **Searching**
 - Support for faceted searching



OLE 0.6 (May 2012)

Cooperative Infrastructure and Services

•Architecture & infrastructure

- Upgrades to Quali Financial System (KFS)
- Proof-of-concept Quali Rice 2.0 architecture
- Proof-of-concept for web editors

•Docstore

- Schema for “instance” document (holdings & items)
- Import of legacy holdings/item data to instance documents



OLE 0.6 (cont' d)

- **Acquisitions**
 - Ingest of EDiFACT records
 - Support for budget & fund accounting
 - License document data model & schema
- **Circulation**
 - Definition of patron classification & schema
 - Load of patron schema & data



OLE 0.6: Main menu screen

kuali
open library environment

[Main Menu](#) [Maintenance](#) [Administration](#)

Beta 0.6 (rev: 6814) 2012-05-02_21-44-17 (Oracle9i)

[action list](#) [doc search](#) **Logged in User: ole-khuntley** [Login](#) [Logout](#) [Provide Feedback](#) [OLD PORTAL](#)

Acquisitions

Purchasing/Accounts Payable

- Bulk Receiving
- Claiming
- Contract Manager Assignment
- Payment Request
- Receiving
- Requisition
- Shop Catalogs
- Vendor Credit Memo

Ingest

Load Order Records

- Staff Upload
- Profile Builder

Load Invoices

- Staff Upload
- Profile Builder

Load Bibliographic Records

- Staff Upload

Acquisitions Search

Cataloging

- Document Store Search

Load Order Records

- Load Reports

Load Invoices

- Load Reports

Load Bibliographic Records

- Load Reports

Purchasing/Accounts Payable

- Electronic Invoice Rejects
- Order Holding Queue
- Payment Requests
- Purchase Orders
- Receiving
- Receiving Queue
- Requisitions
- Vendor Credit Memos
- Acquisitions Search

Search

OLE Beta 0.6 Legend

- Future Kuali functionality to be coded
- Available for test-drive with inherited Kuali functions
- New or adapted OLE functions

Balance Inquiries

General Ledger

- Available Balances
- Balances(top level)
- Cash Balances
- General Ledger Balance
- General Ledger Entry
- General Ledger Pending Entry
- Open Encumbrances

Reports

Accounts Receivable

- Billing Statement
- Customer Aging Report
- Customer Invoice

System (PDF Samples Only)



OLE 0.6: PO sections

Tabbed view, collapsed:

Purchase Order ?

Doc Nbr: 3490	Status: FINAL
Initiator: ole	Created: 12:40 AM 07/07/2012
Purchase Order #: 1042	Purchase Order Status: Open

[expand all](#) [collapse all](#)
* required field

- Document Overview [show](#)
- Delivery [show](#)
- Vendor [show](#)
- Stipulations [show](#)
- Titles [show](#)
- Payment Info [show](#)
- Additional Institutional Info [show](#)
- Quote [show](#)
- Account Summary [show](#)
- View Related Documents [show](#)
- View Payment History [show](#)
- General Ledger Pending Entries [show](#)
- Notes and Attachments (0) [show](#)
- Ad Hoc Recipients [show](#)
- Route Log [show](#)

[sensitive data](#) [payment hold](#) [amend](#) [void order](#) [receiving](#) [print](#) [send ad hoc request](#) [close](#)



OLE 0.6: PO sections:

Titles section:

Titles hide																	
Current Items																	
Item Line #	Item Type	Quantity	UOM	No. of Parts	Description	List Price	Discount	Discount Type	Unit Cost	Extended Cost	Tax Amount	Total Amount	Route To Requestor	Public View	Inactive	Amount Paid	
Item 1																	
1	Qty	1.00	EA EACH	1	WHO CAN STOP THE WIND? : TRAVELS IN THE BORDERLAND BETWEEN EAST AND WEST; TRANS. BY BRIAN MCNEIL,THELLE, NOTTO R., 1941-,COLLEGEVILLE LITURGICAL 2010,9780814633298	14.95			14.95	14.95	0.00	14.95	No	Yes			
	Bib	view	Requestor		HUNTLEY, KEISHA Y												
	Options	Format	Category		Item Price Source		Request Source	BatchIngest		Vendor Item Identifier	12106-0					0.00	
show Notes																	
hide Accounting Lines																	
Accounting Lines hide detail																	
Source																	
	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Dollar \$	* Percent	Actions							
	BL	2947495		7112				14.95	100								
	<small>BLOOMINGTON</small>	<small>RELIGIOUS STUDIES</small>		<small>MONOGRAPH PUBL</small>													
Additional Charges show																	
Totals																	
										Total Prior to Tax:	14.95						
										Total Tax:	0.00						



OLE 0.6: PO sections

Notes & attachments, routing:

Notes and Attachments						
	Posted Timestamp	Author	* Note Text	Attached File	Attachment Type	Actions
add:			<input type="text"/>	<input type="text"/> Browse... <input type="button" value="CANCEL"/>	<input type="text"/> <input type="button" value="add"/>	<input type="button" value="add"/>
1	09/29/2012 11:00 PM	OLE	This PO was automatically closed in batch.			<input type="button" value="delete"/>

Ad Hoc Recipients <input type="button" value="hide"/>			
Ad Hoc Recipients			
Person Requests:			
* Action Requested	* Person		Actions
<input type="text" value="FYI"/>	<input type="text"/>		<input type="button" value="add"/>
Ad Hoc Group Requests:			
* Action Requested	Namespace Code	Name	Actions
<input type="text" value="FYI"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="add"/>

Route Log <input type="button" value="hide"/>			
Route Log <input type="button" value="refresh"/>			
ID: 3521 <input type="button" value="hide"/>			
Title	Purchase Order Close - Library Material_kyh_07070021 [N:A]		
Type	Purchase Order Close	Created	11:00 PM 09/29/2012
Initiator	OLE	Last Modified	11:00 PM 09/29/2012
Route Status	FINAL	Last Approved	11:00 PM 09/29/2012
Node(s)	AdHoc	Finalized	11:00 PM 09/29/2012
Actions Taken <input type="button" value="hide"/>			
Action	Taken By	For Delegator	Time/Date
COMPLETED	OLE		11:00 PM 09/29/2012
		Annotation	This PO was automatically closed in batch.
Future Action Requests <input type="button" value="show"/>			



OLE 0.6: PO sections

Related documents links:

The screenshot displays a web interface with a light gray background and dark gray accents. At the top, there are two tabs: "Account Summary" with a "show" button and "View Related Documents" with a "hide" button. Below the tabs, a section titled "Related Documents" lists several items, each with a "show" button:

- Requisition - [1018](#) show
- Purchase Order [show](#)
Purchase Order - Doc # [3360](#)
- Line Item Receiving - [3409](#) show
- Payment Request - [1063](#) show



Serials receiving (mockup)

Header section of serials receiving record:

H	Journal of philosophical engineering					
E	ISSN	0123-4567		PO #	859484093	Vendor
A				Bib record #	3456783	Instance record #
D	Corporate author	Society of Engineers		Bound location	Main, Stacks	Unbound location
E	Publisher	Professional Press				
R	Subscription status	Active		Serials receipt work	Main	Call number
S						
E	Receiving record type	main		Print label	Yes	Public display
C						
T	Copy number	c.1		Create item	No	Claim
I						
O	Action date	9/16/2011		Action interval	90	Serials receiving record#
N						
	Urgent note	Call Prof. Loony @ 3-8765 when v. 3 pt. 3 arrives.				
	General receiving note	Any map not bound into the issue send to Map Library; make a staff receipt note on this record. If title &				



Serials receiving (mockup)

Receipt and history section:

Receive									
R	Ennum/Chron Captions	v.	pt.	[year]	[month]				
E		12	1	[Enter the year of the serial issue in hand]	[Enter the month of the serial issue in hand]	RECEIVE	SPECIAL ISSUE	CLAIM	[enter public receipt note if any]
C									
E	Receipt History: Main	Enumeration level 1	Enumeration level 2	Chronology level 1	Chronology level 2	receipt status	receipt date/time	public receipt note	staff-only note
I	Serials Receiving Record #	v. 3	pt. 2	2011	Apr.	received	6/16/11		
P		v. 3	pt. 1	2011	Jan.	received	3/5/11	this issue temporarily unavailable	loaned to F Smith -- be 4/12
T		v. 2	pt. 4	2010	Oct.	received	12/15/10		accompany map sent to Library
						claimed			
S		v. 2	pt. 3	2010	July				
E		v. 2	pt. 1/2	2010	Jan./Apr.	received	4/2/10		
E		v. 1	pt. 4	2009	Oct.	received	12/22/09		
C		v. 1	pt. 3	2009	July	received	10/25/09		accompany map sent to Library
T		v. 1	pt. 2	2009	Apr.	received	6/6/09		



Receiving queue

Receiving Queue Search

Receiving Queue Search * required field

Purchase Order Number: <input type="text"/>	Serials: <input type="checkbox"/>
ISxN: <input type="text"/>	Standing Orders: <input type="checkbox"/>
Title: <input type="text"/>	Monograph: <input type="checkbox"/>
Journal: <input type="text"/>	Status: <input type="checkbox"/>
	Vendor: <input type="checkbox"/>
	Purchase Order Date: <input type="checkbox"/>

Search Results

43 items retrieved, displaying all items.

Receive	Title	Author	Publisher	Edition	QTY Ordered	# Pts	PO#	ISxN	Price	Vendor Name
<input type="checkbox"/>	ADS, FADS, AND CONSUMER CULTURE : ADVERTISING'S IMPACT ON AMERICAN CHARACTER AND SOCIETY.	BERGER, ARTHUR ASA, 1933-	ROWMAN & LITTLEFIELD		1.00	1	1086	9781442206694	24.95	YBP Library Services
<input type="checkbox"/>	ALCHEMY OF GLASS : COUNTERFEIT, IMITATION, AND TRANSMUTATION IN ANCIENT GLASSMAKING.		SCIENCE HISTORY PRESS		1.00	1	1065	9780881353501	59.95	YBP Library Services
<input type="checkbox"/>	AMERICAN WOMEN OF SCIENCE SINCE 1900.	WAYNE, TIFFANY K., 1968-	ABC-CLIO		1.00	1	1066	9781598841589	180.00	YBP Library Services
<input type="checkbox"/>	ANCIENT INDIAN LEAPS INTO MATHEMATICS		BIRKHAUSER		1.00	1	1067	9780817646943	99.00	YBP Library Services
<input type="checkbox"/>	ARCTIC SCIENTIST, GULAG SURVIVOR : THE BIOGRAPHY OF MIKHAIL MIKHAILOVICH ERMOLAEV, 1905-1991. BY WILL	ERMOLAEV, A. M. (ALEKSEI MIKHAILOVICH), 1932-2007	UNIV OF CALGARY PRESS		1.00	1	1068	9781552382561	44.95	YBP Library Services
<input type="checkbox"/>	BARRIO BOY.	GALARZA, ERNESTO, 1905-1984	UNIV OF NOTRE DAME PRESS		1.00	1	1083	9780268029791	18.00	YBP Library Services
<input type="checkbox"/>	DAILY SHOW AND RHETORIC : ARGUMENTS, ISSUES, AND STRATEGIES		LEXINGTON BOOKS		1.00	1	1087	9780739150030	32.95	YBP Library Services
<input type="checkbox"/>	FROM 'CIVIL SOCIETY' TO 'EUROPE' : A SOCIOLOGICAL STUDY	SKAPSKA, GRAZYNA	BRILL		1.00	1	1082	9789004192072	141.00	YBP Library



Accounting

Account record, showing multiple assignees:

Account Inquiry expand all collapse all

Account Details ▼ hide

Chart Code:	<u>BL - BLOOMINGTON</u>
Account Number:	0211107
Account Name:	XXXXX - FAC RES - PSYCH
Organization Code and Description:	<u>PSY-PSYCHOLOGY</u>
Campus Code:	<u>BL - BLOOMINGTON</u>
Account Effective Date:	04/01/1999
Account Expiration Date:	
Account Postal Code:	<u>47405</u>
Account City Name:	BLOOMINGTON
Account State Code:	<u>IN - INDIANA</u>
Account Street Address:	PSYCHOLOGY 120
Account Off Campus Indicator:	No
Closed?:	No
Account Type Code:	<u>NA - NOT APPLICABLE</u>
SubFund Group Code:	<u>DFRES - FACULTY RESEARCH</u>
University Account Number:	1047410
Account Restricted Status Code:	<u>U - UNRESTRICTED</u>
Account Restricted Status Date:	
Endowment Chart of Accounts Code:	
Endowment Account Number:	

Account Responsibility ▼ hide

Fiscal Officer Principal Name:	<u>ole-rorenfro</u> - RENFROW, ROBERTA G
Account Supervisor Principal Name:	<u>ole-iaraujo</u> - ARAUJO, JANNA B
Account Manager Principal Name:	<u>ole-rorenfro</u> - RENFROW, ROBERTA G
Continuation Chart Of Accounts Code:	<u>BL - BLOOMINGTON</u>
Continuation Account Number:	<u>2331489</u>
Income Stream Chart Of Accounts Code:	<u>BL - BLOOMINGTON</u>
Income Stream Account Number:	<u>1023287</u>
Account Sufficient Funds Code:	<u>C - Consolidation</u>
Transaction Processing Sufficient Funds Check:	Yes



Docstore

Docstore search screen:

The screenshot shows the Docstore search interface. At the top left is the 'kuali' logo with the tagline 'open library environment'. To the right of the logo are navigation links: 'Main Menu', 'Maintenance', and 'Administration'. Further right is the version information: 'Beta 0.6 (rev: 6814) 2012-05-02_21-44-17 (Oracle9i)'. On the far right is a 'Provide Feedback' link. Below the navigation bar is a yellow bar with 'action list' and 'doc search' buttons. On the right side of this bar, it says 'Logged in User: ole-khuntley' and has 'Login' and 'Logout' buttons. The main content area is titled 'Document Store Discovery'. Underneath is the 'Advanced Search' section. It includes dropdown menus for 'Document Category' (set to 'Work'), 'Document Type' (set to 'Bibliographic'), 'Document Format' (set to 'ALL'), and 'Sort By' (set to 'Title (A-Z)'). There are two search rows, each with a text input field, a dropdown menu set to 'All of these', and a 'Search Field' dropdown set to 'All'. Between the two rows are radio buttons for 'AND', 'OR', and 'NOT', with 'AND' selected. Below the search rows is a '[+] Add' button. At the bottom of the search area are three buttons: 'search', 'clear', and 'cancel'.



Docstore

Docstore search result screen:

kuali
open library environment

Main Menu Maintenance Administration

Beta 0.6 (rev: 6814) 2012-05-02_21-44-17 (Oracle9i)

action list doc search

Logged in User: ole-khuntley Login Logout

Document Store Discovery

Revise Search New Search

Your Search: **DocCategory** - work **DocType** - bibliographic **DocFormat** - all
SearchTerms-(all_text:(ot*allo))NOT(Author:(shak*))
 Limited To:(No limits applied)

Limit Your Search...

Selected page: 1 Go to page

1-25 of 1309 results

Sort By Title (A-Z) Show 25

[Expand All] | [Collapse All]

1. "Lovers meeting"; discussions of five plays by Shakespeare.

Author: Carnegie-Mellon University.
 Publisher: Pittsburgh, Carnegie Institute of Technology, 1964.
 Description: Foreword by A. Wright.--Love's labour's lost, by D. M. Goodfellow.--Romeo and Juliet, by J. A. Hart.--Twelfth night, by A. F. Sochatoff.--Othello, by A. L. Hayes.--The winter's tale, by B. W. Cottrell.

Subject: Shakespeare, William.
 Location:
 Format: Book
 Doc Type: bibliographic
 Doc Format: marc

View XML Edit XML

2. "O"

Author: Gitter, Eric.Fried, Daniel L.Ruhlen, Anthony.Kaaya, Brad.Nelson, Tim Blake.Phifer, Mekhi.Hartnett, Josh,Stiles, Julia,Heard, John,Sheen, Martin.
 Publisher: [United States] : Trimark Home Video : Lions Gate Home Entertainment, [2002], c2001.
 Description:
 Subject: Shakespeare, William.
 Location:
 Format: Video
 Doc Type: bibliographic
 Doc Format: marc

Author

- Verdi, Giuseppe, (396)
- Puccini, Giacomo, (151)
- Rossini, Gioacchino, (91)
- Bizet, Georges, (69)
- Giordano, Umberto, (68)

more...

Subject

- Operas (602)
- Ehret (Alvin M.) Vocal Recording Collection. (326)
- Shakespeare, William, (303)
- Ross Allen Collection. (61)
- Operas. (57)

more...

Format

- Sound recording (668)
- Book (519)
- Video (69)
- Musical score (50)



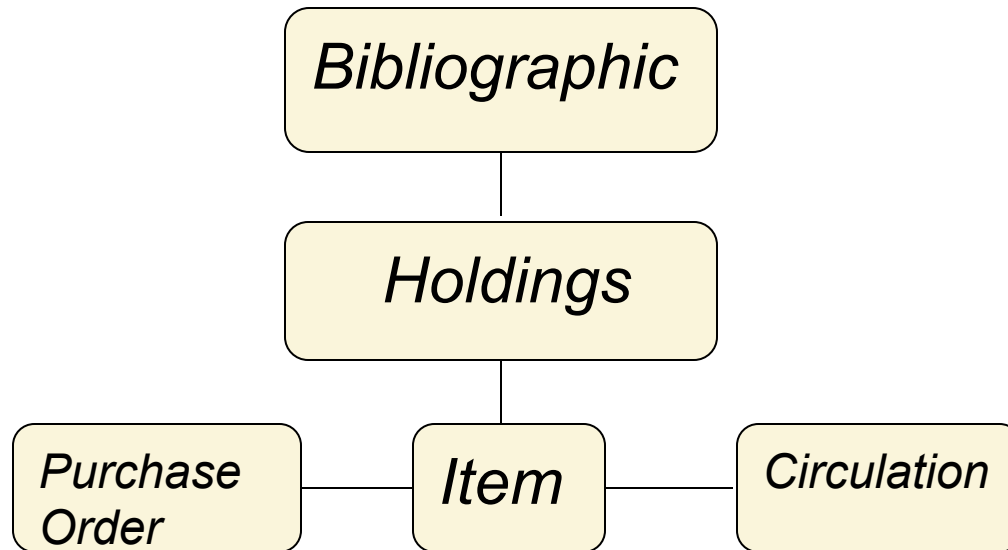
Loan screen

The screenshot shows the Kuali web interface. At the top left is the Kuali logo with the tagline "open library environment". To the right are navigation tabs for "Rice Main Menu", "Administration", and "OLE". Below these are buttons for "action list" and "doc search". The breadcrumb trail reads "Home » Loan". The main heading is "Loan". The patron name "Phoebe Rample" is displayed in green. Below this, the form fields are: "* Patron:" with the value "6010570002205588" and the role "Faculty"; and "* Item:" with the value "224415626".



OLE 0.8 (Q2 2013)

OLE record relationships





OLE 0.8

Cataloging

- Assigning or updating “status” for bib
- Creating & editing holdings & items (“instance editor”)
- Sorting call numbers
- Deleting bib, holdings, & item records
- “Transferring” holdings & item records
- Importing a single bib
- Support for “bound-withs”



OLE 0.8

Circulation

- Patron records
- “Circulation desks”
- Check-out
- Check-in
- Renewals
- Requests
- Overdue notices
- Requests
- “Claims returned”
- Support for circulation standards: NCIP, SRU, Z39.50



OLE 0.8

Acquisitions

- Proforma invoicing
- License requests
- Fund notifications & rules
- “Ingest”: Bib record overlay



OLE 1.0 (Q4 2013)

- **Cataloging**
 - Support for analytics
 - Export of records (single & batch)
 - Enhancements to bib editor
 - Authority control “white paper”
- **Circulation**
 - Patron self-service
 - ILL integration



Tentative Implementation Schedules

- Early implementers (Release 1.0, 2013-2014)
 - Lehigh University
 - University of Chicago
- “Mid-implementers” (Release 1.5, 2014-2015)
 - **Indiana University**
 - University of Pennsylvania
 - Duke University
 - North Carolina State University
- Later implementer (2016)
 - University of Maryland
- “Still thinking”
 - Florida consortium
- Unknown
 - Villanova



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GOKb

Global Open Knowledgebase

*GOKb will be a **freely available data repository** that will contain **key publication information** about electronic resources **as it is represented within the supply chain** from content publishers to suppliers to libraries.*



Global Open Knowledgebase (GOKb)

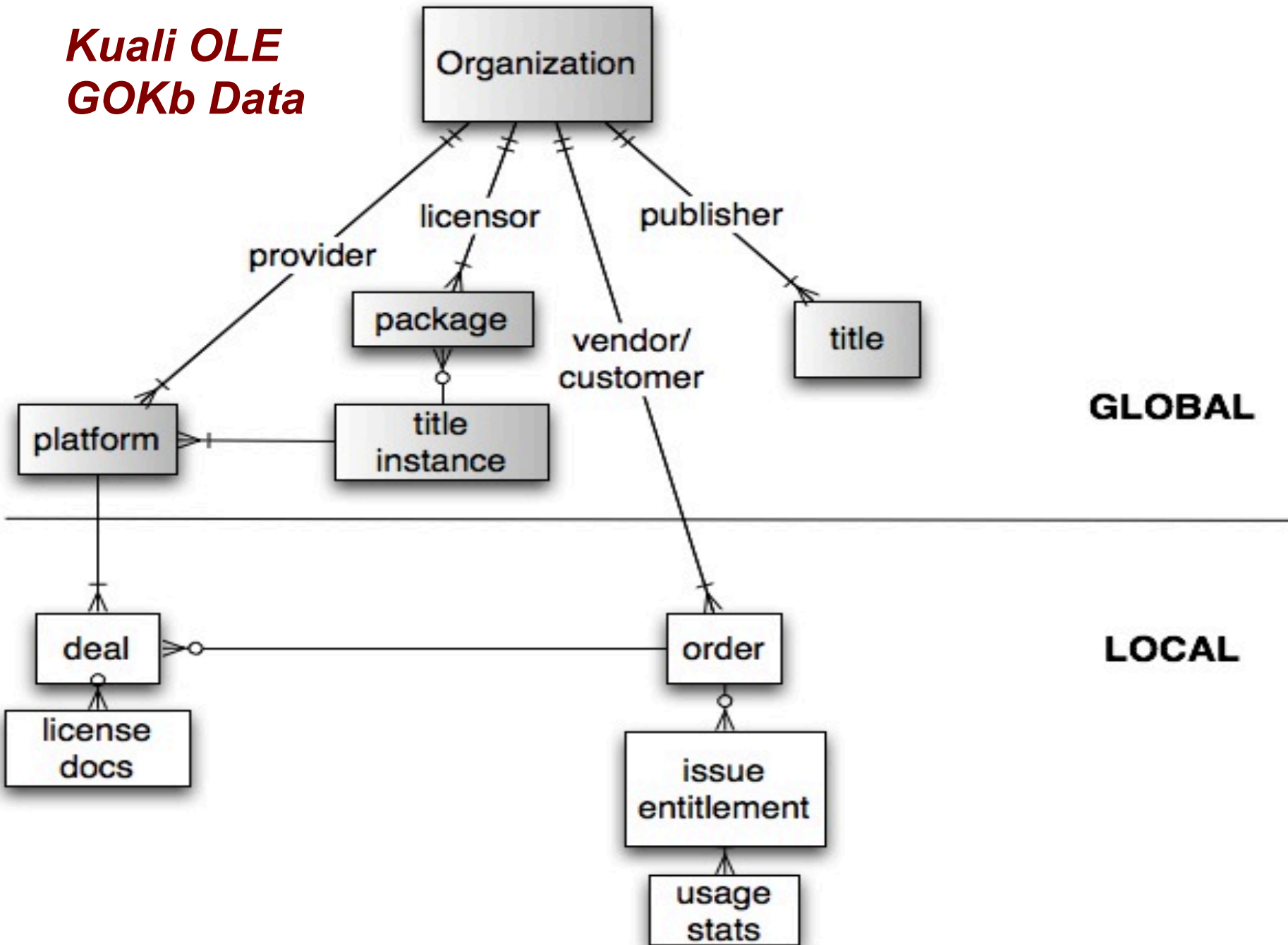
- Joint Quali OLE / JISC project
- Mellon Foundation funded for June 2012- June 2013
- Community-managed knowledgebase
- Global-level descriptive data about e-resources for library management
- Designed to be open to all, but targeted to integrate with Quali OLE and JISC's Knowledgebase Plus



GOKb Key Deliverables

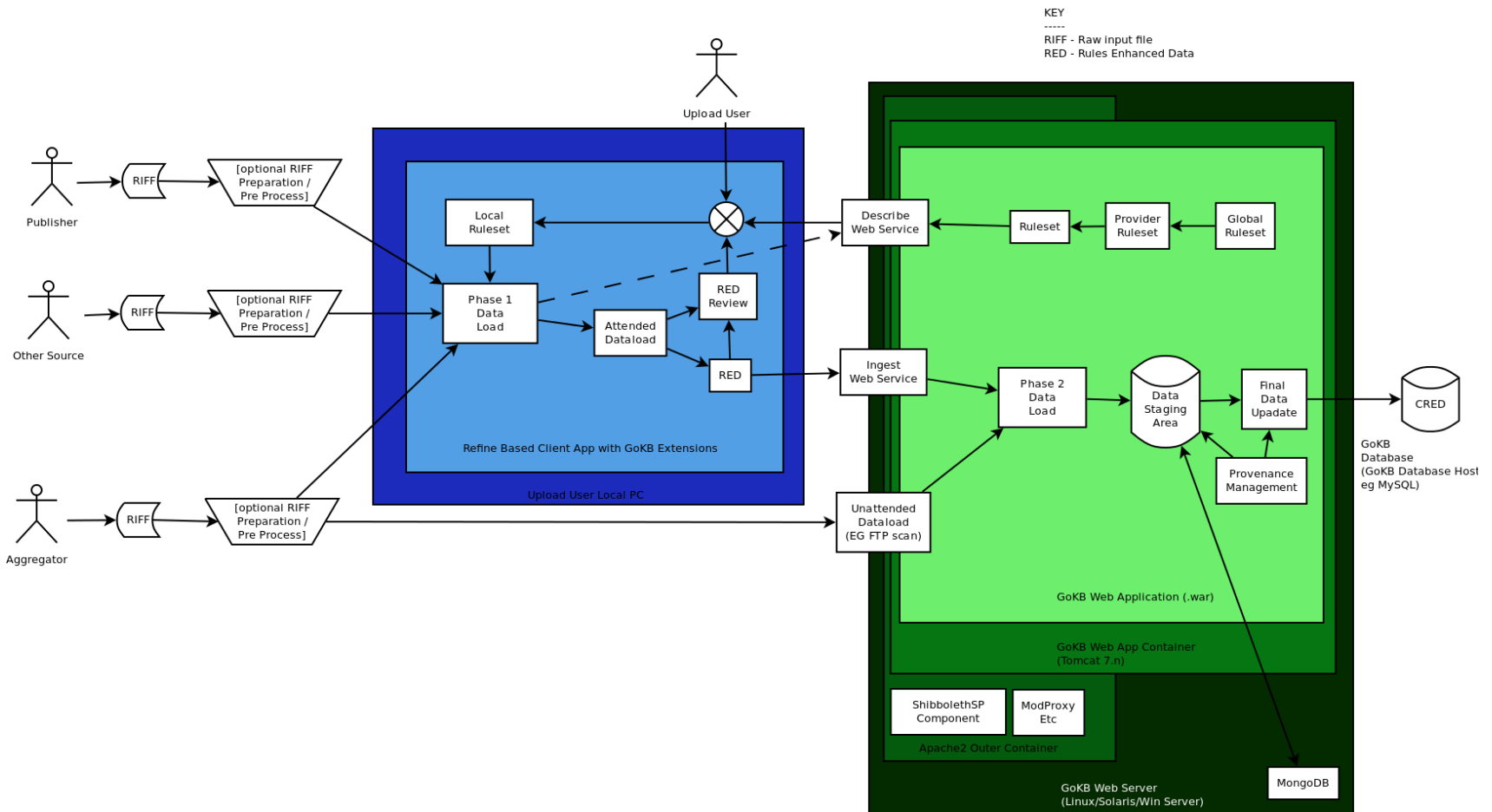
- Open Knowledgebase using a standards-based architecture
- User Interface and APIs to maintain and use the GOKb data
- Data covered by a CC0 license
- Expose as open linked data service
- The rules engine will accept rules from the community of functional experts without coding!
- GOKb will be deployed as a cloud service

***Kuali OLE
GOKb Data***





GOKb Data Flow





Impact of Quali OLE Technologies

- **Document Store**
 - Flexible, easily extensible, and heterogeneous
 - Collocates related documents in a node-based, tree structure
 - Solr indexing engine is fast, scalable, and familiar making it easy for libraries to customize discovery tools for staff
- **Editor Framework**
 - Supports easy construction of editors for many purposes
 - Local control over editors so you can “roll your own”
 - Links editors to workflow and rules engine
- ***Workflow and Rules Engine***
 - *Local control of workflow and rules*
 - *Supports multiple workflows based on roles and context*
 - *External workflows can be referenced*
- ***Quali OLE Patron Framework***
 - *Leverages enterprise identity management systems*
 - *Can cascade through multiple sources of identity management*
 - *Supports hybrid of local and remote data*



Library Management System Marketplace

A smaller group of larger firms dominate the library automation marketplace. They are largely international, diversified, and privately owned. The mergers and consolidations that marked the recent history of the industry have absorbed the weaker products and companies.

Marshall Breeding-Library Automation Expert

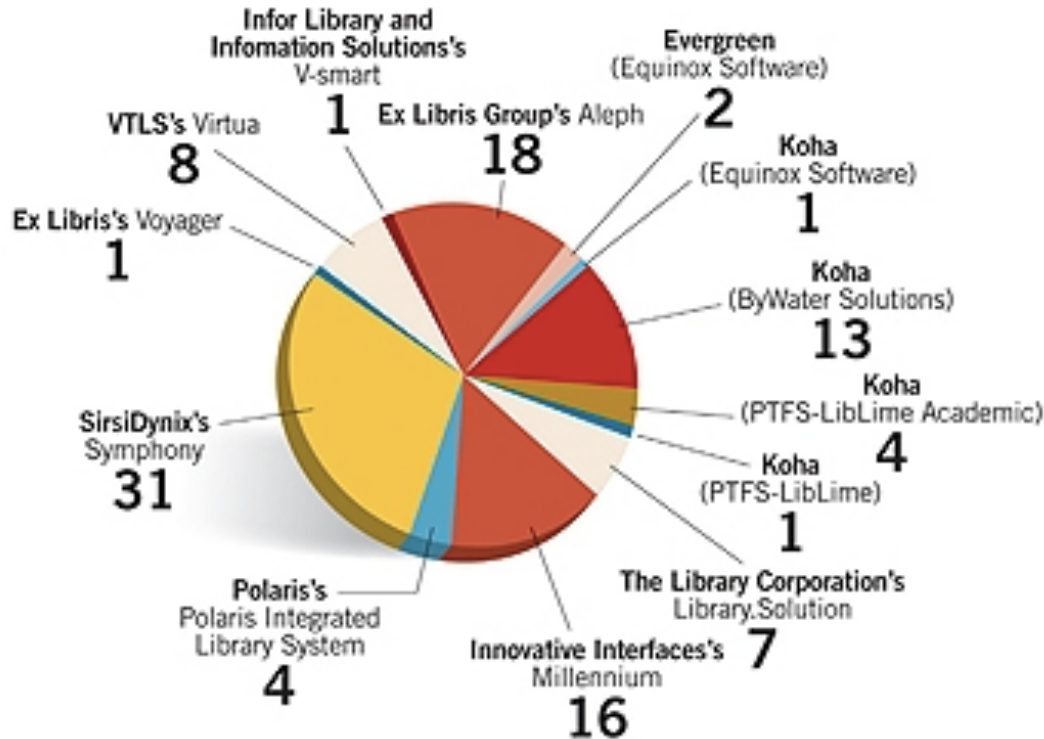
Breeding, M. (2012). Automation Marketplace 2012: Agents of Change, The Digital Shift, <http://bit.ly/YJy1UD>



U.S. Academic Library Systems Sales 2011

U.S. Academic Library Sales 2011/ILS

(by Number of Contracts)



Breeding, M. (2012). *Automation Marketplace 2012: Agents of Change, The Digital Shift,*



Library Services Platforms

Company	System Name	2009 Total	2010 Total	2011 Total	2011 New
Library Services Platforms					
Ex Libris	Alma		8	24	0
Innovative Interfaces, Inc.	Sierra			206	1
OCLC	WorldShare Management Service			184	
Serials Solutions	Intota			0	0



How Does OLE Compare?

- Compared to other NextGen Library Systems:
 - Shared implementation community with academic libraries
 - Shared vendor (services-based profit center) community with Quali Commercial Affiliates (KCA' s)
 - Not possible with proprietary software
 - Commercial and possible shared hosting
 - Local cloud
 - Hosted cloud
 - Cloud support vs. application support
 - Shared expertise in integrations with other higher ed information systems
 - Shared ERM in GOKb



Thank You!

For more on Kuali OLE:

- Visit our website: <http://ole.kuali.org>
- See our “test drive”:
<http://kuali.org/test-drives>
- Follow us on Twitter: @kualiOLE
- Read our blog:
<http://kualiOLE.tumblr.com>