Kuali OLE: From Startup to Software

Robert H. McDonald – Executive Director Kuali OLE
Mike Winkler – Chair Kuali OLE Functional Council
Bradley Skiles – Kuali OLE Project Manager
Richard Slabach – Kuali OLE QA Manager
Story of Kuali OLE

- Who are we?
- What have we done?
- What comes next?
- How did we do that?
- Where are we going?
Kuali OLE Foundations
Phases of Kuali OLE

- Community Phase
- Design Phase
- Build Phase
- Sustainability/Future
Kuali OLE Demonstration

Kuali OLE DEMO

OMG! OLE is my BFF!
Kuali OLE Progress to Date

Functional Council
- Began weekly meetings in Summer 2010
- 4 face to face meetings

Technical Council
- Weekly conference calls
- Rice training

Core Team
- Hiring Project Manager, Business Analyst, Data Architect, Quality Assurance Manager, Operations Manager
- Development of project infrastructure – Jira, Amazon services, QA protocol

Hire HTC Global Services, Inc
- Project manager, On-site senior developers, Data architect, & Storage consultant
- Two onshore senior developers
- Offshore Kuali center of excellence, 12 developers
Kuali OLE Progress to Date

Working teams draw from the Partnership
• Technical Teams: KFS fit analysis, Document store technical analysis, Dataset repository, User roles teams
• 7 specification writing teams
• Infrastructure Teams: User stories, Data model, Workflows, User experience, User roles teams

Generation of over 3000 user stories
• Participation of over 100 SMEs
• Over 230 vetted & groomed for the current development sprints

Outcomes
• 14 completed specifications, 25 in progress, 150 assigned to 7 specification writing teams
• Code production from developers
• KFS-OLE instance for accounting requirements
What Did We Just Demonstrate?

- A standard library workflow for creating purchase orders for vendors
- Simple integration of external data
- Configurable workflow that can meet different business needs
- An already fixed problem to show our use of Kuali infrastructure – Kuali Rice & KFS
- One of our user stories – one person approvals for purchases
- That Kuali OLE is now code on the ground & not vaporware
Kuali OLE Roadmap

July 2011
- Kuali OLE Framework
- Select & Acquire Modules

November 2011
- Document store integrated
- Integration toolkit available for suppliers, knowledgebase, utilities
- Preliminary release of Describe & Relationship
- Test drive version available

February 2012
- Complete coding for Select, Acquire, Describe
- Preliminary release of Deliver, Policies

April 2012
- Complete coding for all functions
- Integration toolkit compete
- Preliminary migration toolkit release
- Implementers Track at Kuali Days
- Test drive version available

July 2012
- OLE released
- Implementations begin at Partner sites
- Implementers Track at Kuali Days
- Test drive version available

- Support wiki in place
- Help desk service commences

- Affiliate training program
- Implementer training available

- Developer community event
- V2 vision release
CrowdSourcing Through Collaboration

From artist Liubo Borissov - http://www.pratt.edu/pratt_blog/view/liubo_borissov_crowdsourcing/
Project Management: Who’s Driving the Bus?

OLE Functional Council

Library Subject Matter Experts

OLE Technical Council
Functional Experts Participation

100+ *FUNCTIONAL* Experts to Date

- UF, FL Consortium: 20
- PENN: 14
- NCSU: 16
- Maryland: 13
- Lehigh: 12
- Indiana: 10
- Duke: 8
- Chicago: 13
Project Approach: Agile

Traditional “Black Box” Development

Functional Users

Developers
Project Approach: Agile

The Agile Approach

- Librarians drive the process as product owner & domain experts
- Rapid, iterative planning & development cycles
- Constant evaluation of evolving product
- Immediate feedback from users
- Constant learning & improvement with each successive cycle

Agile Complexion

- Core team & HTC developers participate in daily scrums to ensure communications
- 2 week sprints ensure quick code turn around for librarian acceptance
Agile Fits Community Driven Development
Kuali OLE Sustaining Beyond 2012

- Workflow – Workflow – Workflow
  - Toward Born Digital
  - Toward multi-digital copies
  - Toward licensing management logic
- Operational Existence through 2022
- Kuali Rice as service bus for Above-Campus Workflow
- Interested in opportunities for structured and open-linked data services
  - Shared or consortial KB’s
- Kuali Commercial Affiliates (KCA’s) interested in:
  - Structured data and service oriented data services not necessarily SaaS
  - IaaS cloud services for consortia
  - Support and Implementation Services
- Virtualization services for the cloud
Contact Us!

• Kuali OLE Website: http://ole.kuali.org
• Follow Us on Twitter: @kualiole
• Talk to us:
  – Robert McDonald – robert@kuali.org
  – Mike Winkler – winkler4@upenn.edu
  – Brad Skiles- bradskil@indiana.edu
  – Rich Slabach – rlslabac@indiana.edu