

Community & Open Source Software in Cultural Heritage Institutions

CNI December 2012

Themes

- ▶ Governance
- ▶ Marketplace
- ▶ Community
- ▶ Sustainability



Kuali OLE

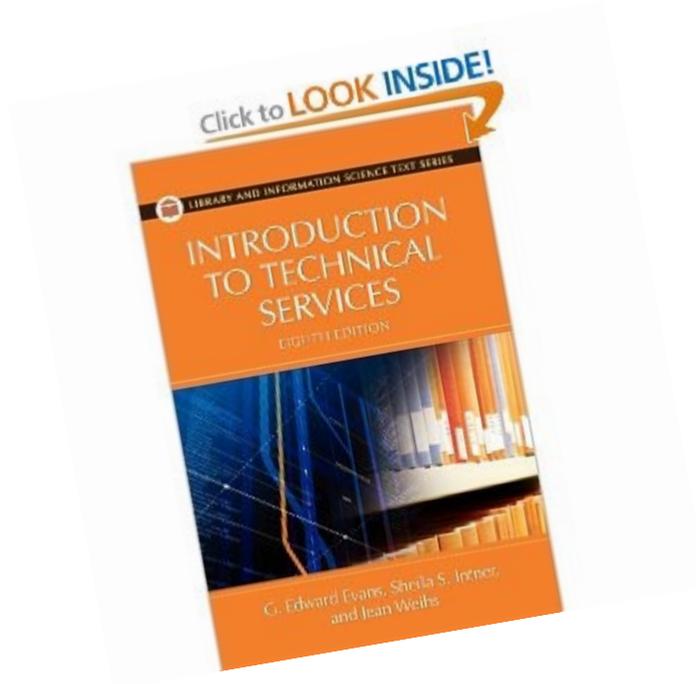
Molly Tamarkin, Associate Univ. Librarian for IT, Duke

Outline

- ▶ A Brief History of Kualī OLE
- ▶ Community
- ▶ Governance
- ▶ Marketplace
- ▶ Kualī OLE Release/Implementation Roadmap
- ▶ Kualī OLE and GOKb
- ▶ Sustainability



What is Kuali OLE?



a flexible, service-oriented, enterprise library management system for academic & research libraries



Brief History of Kualii OLE

- ▶ 2008-2009 Mellon-funded OLE Project Investigation
- ▶ 2009 Formed OLE Build Partnership
- ▶ 2010 OLE Build Phase Funded by Mellon Foundation & the Kualii OLE Partnership for a 2 year software build phase
- ▶ 2012 Received Mellon funding for 3rd and final year of development



Kuali OLE Partners

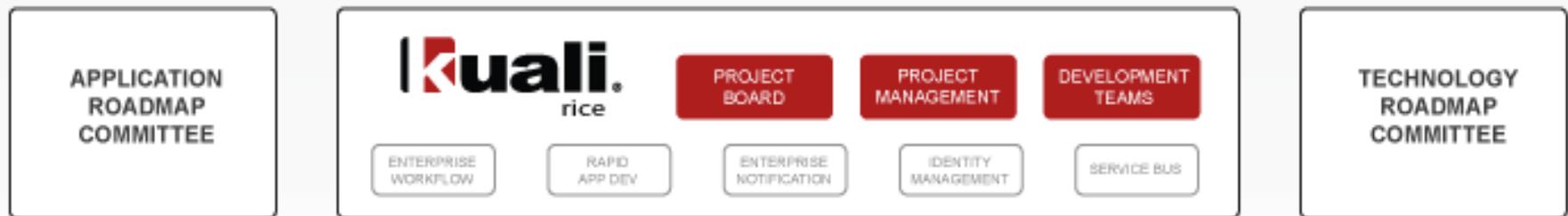
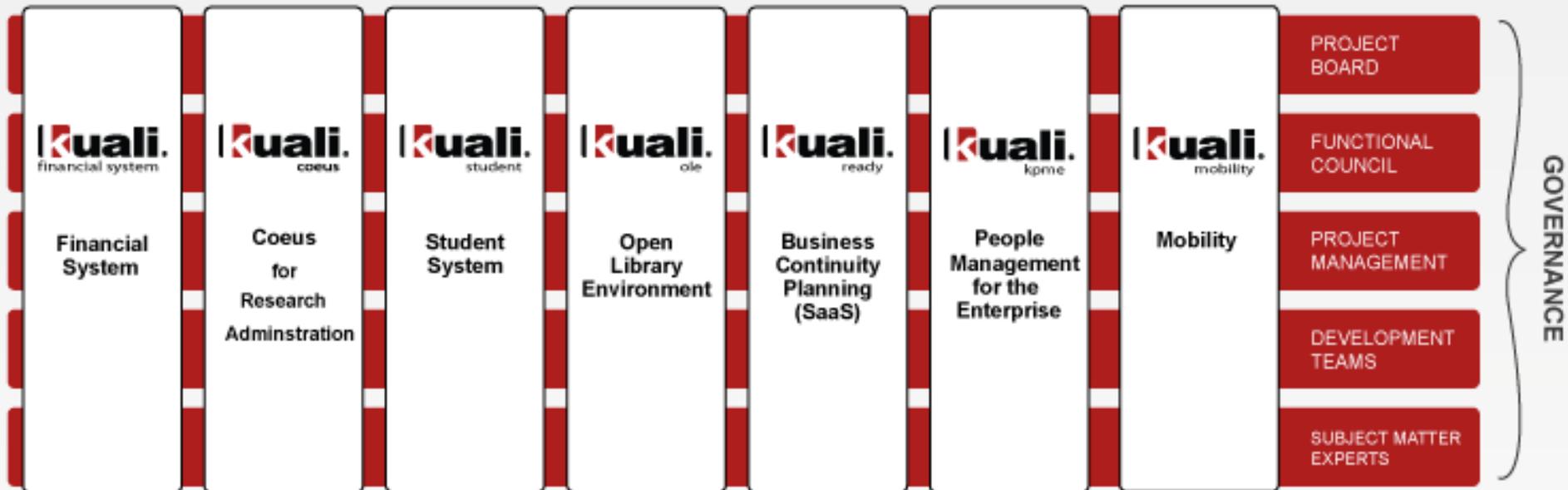


The Andrew W. Mellon Foundation

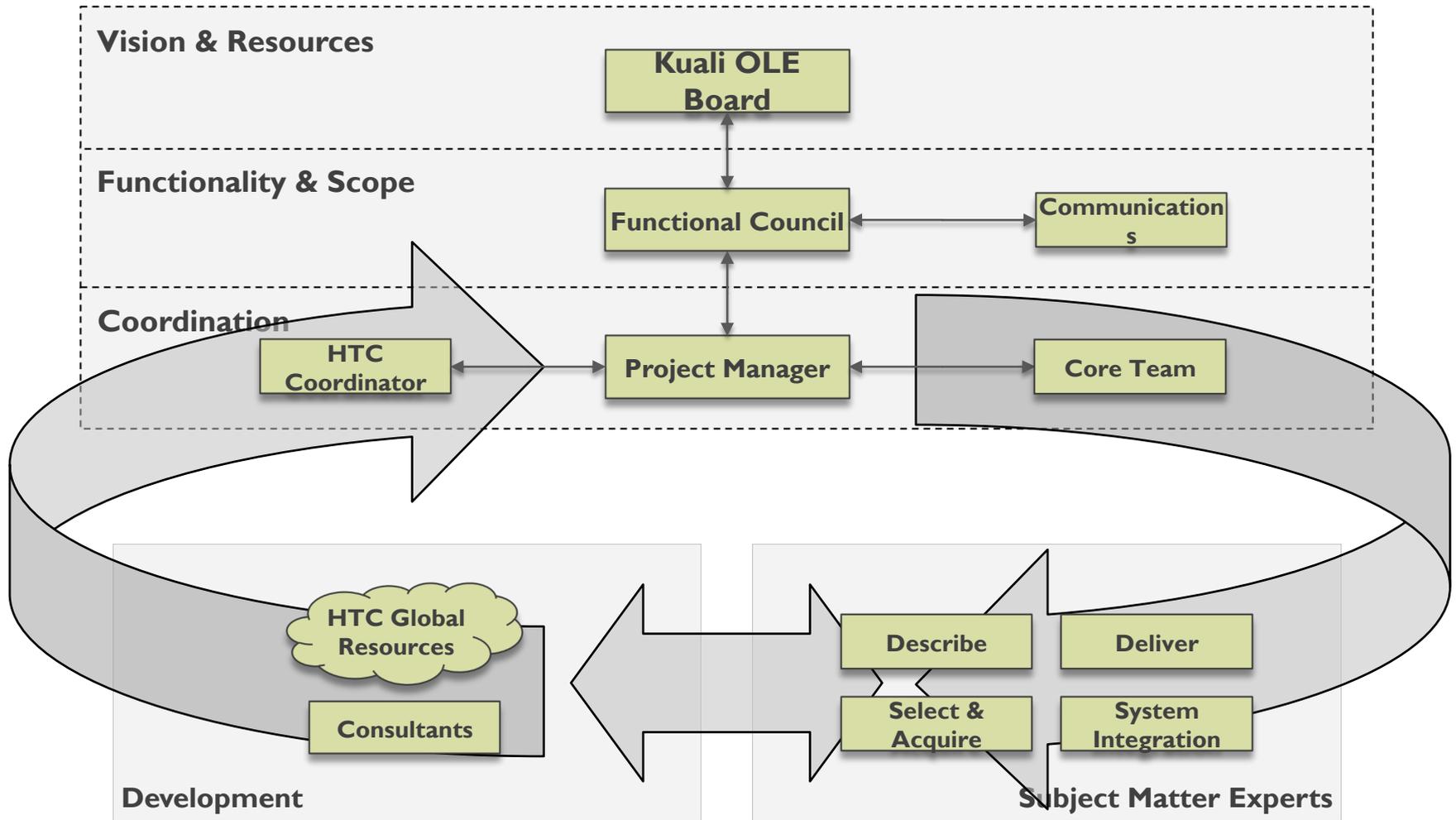


Kuali Foundation





Kuali OLE Organization



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?

- ▶ Shared Implementation Community with Academic Libraries
- ▶ Shared vendor (services-based profit center) community with Kuali Commercial Affiliates
- ▶ Commercial and Possible Shared Hosting
 - ▶ Local Cloud / Hosted Cloud
- ▶ Shared expertise in integrations with other HigherEd information systems
- ▶ Shared ERM in GOKb
- ▶ Can other systems enable workflow and queues for all of your siloed systems? Kuali OLE can and does this now!



Kuali OLE Detailed Roadmap



Kuali OLE Milestones

- ▶ **Build (July 2010-December 2010)**
 - ▶ Hire and Engage Kuali OLE Core Team
 - ▶ Engage Software Development Contract with HTC Global Services
 - ▶ Set Kuali OLE Agile Framework and Timelines
 - ▶ Form Functional Specification Writing Teams
- ▶ **Year 1 Prototype – Kuali OLE 0.2 (December 2010-April 2011)**
 - ▶ Demo at CNI Spring 2011 Member Meeting
 - ▶ <http://www.kuali.org/ole/demo/spring11/cni>
- ▶ **Software Releases**
 - ▶ First Public Release – Version 0.3 – Kuali Days 2011 (October 2011)
 - ▶ Second Public Release – Version 0.6 (May 2012)
- ▶ **Develop Year 2 Roadmap (November 2011-April 2012)**
- ▶ **GOKb Project with JISC for OLE ERM Components (June 2012-Nov. 2013)**
- ▶ **In addition to our Amazon cloud test-drive version of Kuali OLE 0.6 University of Chicago now has a local installation on a virtual machine sandbox for testing**
 - ▶ Will load full bibliographic records for U Chicago in December 2012



Current System State

Faceted Discovery

- Solr Search & Faceting

Select & Acquire

- POs, Receive item, Pay Invoices, Budget and Fund Accounting

Describe

- Descriptive Metadata, Instance Doc, MARC XML, Dublin Core, agnostic

Deliver

- Patron Services, Patron Schema & Classification

Document Editor Framework

- Workflow, Schema-driven Editors

Kuali Financial System Version 5.0

- Kuali OLE Core Financial Functions

Apache Jackrabbit

- Kuali OLE Document Store

Kuali Rice 2.0

- Enterprise Middleware – Identity Management, Workflow, Messaging, Triggers, Rapid Application Development, Service Registry, Rules Engine
-



Kuali OLE Upcoming Releases

- ▶ **Kuali OLE Version 0.8 - (Q2 2013)**
 - ▶ KRAD Integration with:
 - ▶ Bibliographic Editor
 - ▶ Instance Editor in KRAD
 - ▶ Licensing Editor KRAD
 - ▶ Integration with KFS 5.0
 - ▶ Data Loaders for Alpha Testing
 - ▶ Early Adopters will use this to get ready for production readiness
- ▶ **Kuali OLE Version 1.0 - (Q4 2013)**
 - ▶ Production Ready Version (Beta)
 - ▶ Cloud Hosting Scenarios
 - ▶ Final integration with full RICE 2.0 and KFS 5.0





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-
November 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



Sustainability

Community

- partners
- big enough to sustain development
- little distance to developers
- process in itself has value

Marketplace

- user group
 - growth / share
 - little distance to sales staff
 - process is something you survive
-
- 

Learn More

- ▶ <http://ole.kuali.org>
- ▶ Test-Drive - <http://kuali.org/test-drives>
- ▶ Twitter: [@kualiole](https://twitter.com/kualiole)
- ▶ Blog: <http://kualiole.tumblr.com>

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