Community & Open Source Software in Cultural Heritage Institutions
Themes

- Governance
- Marketplace
- Community
- Sustainability
Kuali OLE

Molly Tamarkin, Associate Univ. Librarian for IT, Duke
Outline

- A Brief History of Kuali OLE
- Community
- Governance
- Marketplace
- Kuali OLE Release/Implementation Roadmap
- Kuali OLE and GOKb
- Sustainability
What is Kuali OLE?

a flexible, service-oriented, enterprise library management system for academic & research libraries
Brief History of Kuali OLE

- 2008-2009 Mellon-funded OLE Project Investigation

- 2009 Formed OLE Build Partnership

- 2010 OLE Build Phase Funded by Mellon Foundation & the Kuali OLE Partnership for a 2 year software build phase

- 2012 Received Mellon funding for 3rd and final year of development
Kuali OLE Partners

Duke University

Kuali Foundation

The University of Chicago

UF Florida Partnership

Indiana University

Kuali

Lehigh University

Open Library Environment

University of Maryland

North Carolina State University

Villanova University

Penn University

The Andrew W. Mellon Foundation
# Library Services Platforms

<table>
<thead>
<tr>
<th>Company</th>
<th>System Name</th>
<th>2009 Total</th>
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<th>2011 Total</th>
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<td><strong>Library Services Platforms</strong></td>
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<td>Ex Libris</td>
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<td>Innovative Interfaces, Inc.</td>
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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](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

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<th>Faceted Discovery</th>
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<td>• Solr Search &amp; Faceting</td>
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<tr>
<th>Select &amp; Acquire</th>
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<tr>
<td>• POs, Receive item, Pay Invoices, Budget and Fund Accounting</td>
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<td>• Descriptive Metadata, Instance Doc, MARC XML, Dublin Core, agnostic</td>
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<td>• Patron Services, Patron Schema &amp; Classification</td>
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<td>• Workflow, Schema-driven Editors</td>
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<th>Kuali Financial System Version 5.0</th>
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<td>• Kuali OLE Core Financial Functions</td>
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<th>Kuali Rice 2.0</th>
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<td>• Enterprise Middleware – Identity Management, Workflow, Messaging, Triggers, Rapid Application Development, Service Registry, Rules Engine</td>
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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 Kuali 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 Kuali 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: @kuali ole
- Blog: http://kuali ole.tumblr.com

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