Kuali OLE: A Collaborative ILS Partnership

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

• A community within a community
  • Part of the Kuali Foundation – Building software and community for Higher Education
  • 66 Members, 8 Projects, 12 Commercial Affiliates
  • Nearly 1000 people involved
  • A legal entity and a philosophy

• Kuali OLE Partners
  • Software designed by Librarians for Libraries to serve users
  • 10 institutions, 5 KCAs & affiliates, GOKb
  • 50+FTE including architects, coders, designers, SMEs, testers, and documenters
  • Funded by the Partners and the Andrew W Mellon Foundation
What is Kuali OLE?

Kuali OLE (Open Library Environment) is also a community built among academic libraries to provide for our evolving needs.
Current OLE Implementers

• University of Chicago/Summer 2014

• Lehigh University/Summer 2014

• SOAS-University of London/Winter 2015
Kuali OLE is a Solution

• For developing and managing a next generation, library services platform
• KOLE is building to meet the following requirements:
  • Flexibility in design
  • Community ownership with an open source license and strong vendor support
  • Modular Service-Oriented Architecture
  • Enterprise-level integration
  • Meet current and future business needs
  • Sustainable design enabling the evolution of software, hardware, and mission
Kuali OLE Characteristics

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

Integrated & Independent

Open source

Supportive of research university scale

Enterprise caliber

- Community and Commercial support
- Java
- Cloud Ready

- Service-oriented architecture
- Enhanced Discovery Services

Kirjastoverkkopäivät – National Library Days – Helsinki, Finland
October 22, 2014
#kualiole | @kualiole
Kuali OLE is Software

• Enterprise Java with services middleware
• Built to integrate & interoperate
• A platform for development
• Designed for libraries by librarians!
• Web services APIs
The Current ILS
So, the ILS helps libraries manage...

Only a part of the total workflow...
In Transition: The Current Library Management System Landscape

Systems of Libraries Considering Migration 2013

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

Characteristics of Kuali OLE Org Fit

- **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 Functional Architecture

- Four functional modules
- Overlapping functionality
- Iterative and maturing capabilities
- Open architecture and code
- Built on Kuali enterprise architecture
Functional Architecture – Select & Acquire

Functional Architecture - Describe

- Describe – http://www.kuali.org/ole/modules/describe-manage-entity
Functional Architecture - Delivery

• Deliver – [http://www.kuali.org/ole/modules/deliver-entity](http://www.kuali.org/ole/modules/deliver-entity)
Functional Architecture – Systems Integration

- Systems Integration –
  http://www.kuali.org/ole/modules/systems-integration-entity
Release 1.5 Scope

- Completed by the Functional Council at Kuali Days 2013
- Focus is on the Early Adopter Release
- Packaged and released for 2-July
- Select and Acquire
  - E-Resource renew, copy, cancel, and link to other documents
  - Serial renewals
  - Budget snapshots
- Describe and Manage
  - Cloning existing records
  - Global changes to OLE Instances (Item & Holding records)
  - Cataloging analytics
  - Clickable URLs
Release 1.5 Scope

- **Deliver**
  - Circulation standards: SIP/SIP2/RFID
  - Enhance patron and item checkout notes
  - Circulation calendar
  - Enhancements on account blocks and requests

- **System Integration**
  - User interface improvements
  - Search framework across modules
  - Compatibility with storage facility retrieval system

- **Implementation Tools**
  - Reporting tools
  - Distribution packaging
  - Framework for training development

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October 22, 2014

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Release 2.0 Scope

• Completed by Functional Council at KCW 2014
• Focus on General Release
• Package and release for 1st Quarter 2015
• Select and Acquire
  • Electronic resources management
    • Track platforms, subscriptions, and vendors/organizations
  • Initial GOKb integration
  • Triggers/alerts for future actions
• Fiscal year rollover
• System Integration
  • Implementation loaders
  • Middleware upgrades
• Implementation Documentation!!!
Kuali OLE Implementation

• Start up KOLE instance
  • Define deployment option
  • Analyze institutional data required to populate
  • Create and bootstrap local instance of OLE
• Select & Acquire Data
  • Prepare Chart of Accounts
  • Populate vendor file
  • Load continuations and open orders
  • Load serials holdings
• Describe Data
  • Extract and map Bibliographic & Instance DocStore Data
  • Load DocStore data using loader templates
Kuali OLE Implementation

• Deliver Data
  • Extract & map patron and circulation history data
  • Load Circulation history data
  • Create circulation policies
  • Input and test Deliver parameters

• Systems Integration
  • Integrate with Identity Management System
  • Determine Roles & Permissions
  • Select and implement discovery layer of choice

• Set up services reporting
Consortial Implementations
Separate Full Stacks

Data Stores
- Bib & Instance
- Financial
- Patrons

Middleware
- Kuali Rice

Application
- Kuali OLE

Upstream Services
- Discovery Services
- Resource Sharing
- Suppliers
- Learning Mgmt

Partner A
- Kuali OLE
- Kuali Rice
- Bib & Instance
- Financial
- Patrons

Partner B
- Kuali OLE
- Kuali Rice
- Bib & Instance
- Financial
- Patrons

Partner C
- Kuali OLE
- Kuali Rice
- Bib & Instance
- Financial
- Patrons
Shared System

Upstream Services
- Discovery Services
- Resource Sharing
- Suppliers
- Reporting
- Learning Mgmt

Data Stores
- Bib & Instance
- Patrons
- Financial

All Partners

Middleware

Application

Kuali OLE

Kuali Rice
OLE Collaborators/Commercial Affiliates
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.

Support by Co-Conference Presentations on Discovery

OLE Partners have worked directly on EDS/OLE Interoperability

Sponsorship for OLE Events Kuali Days & Kuali Days UK

Partnership synergy is EDS + Backend Open Source Library Management System

Advancing discovery capabilities within the Kuali Community.
The Global Open Knowledgebase (GOKb)

• Andrew W. Mellon Grant, April 2012-March 2014
• 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 Version 1.0 – now available
  • https://wiki.kuali.org/display/OLE/Install+the+GOKb+Extension
Current OLE Implementers

- University of Chicago/Summer 2014
- Lehigh University/Summer 2014
- SOAS-University of London/Winter 2015
OLE Workflows

Lehigh University Libraries
Select and Acquire workflow:

- Create Requisition/PO
- How does it link to Bibliographic record
- Can you link to an electronic bibliographic record and create an electronic holdings record?
- How do you represent funds?
<table>
<thead>
<tr>
<th>Bib Info:</th>
<th>No of Copies Ordered</th>
<th>No of Parts Ordered</th>
<th>List Price</th>
<th>Extended Cost</th>
<th>Public View</th>
<th>Do Not Claim</th>
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<th>Request Source</th>
<th>Route To Requestor</th>
<th>Claim Date</th>
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<tr>
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<td>Publisher</td>
<td>Staff</td>
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<table>
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<tr>
<th>Format</th>
<th>Category</th>
<th>Vendor Item Identifier</th>
<th>Requestor</th>
<th>Item Status</th>
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<tr>
<td></td>
<td></td>
<td>%</td>
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### Completed Requisition

**Current Items**

**Item 1**

- **Bib Info:** Buying the vote : a history of campaign finance reform / Mutch, Robert E., 9780199340002 (hardcover : acid-free paper)
- **Location:** LEHIGH/LIND/L-ORDER
- **No of Copies Ordered:** 1
- **No of Parts Ordered:** 1
- **List Price:** $50.00
- **Extended Cost:** $50.00
- **Public View:** Yes
- **Do Not Claim:** No

**Receipt Status**

- **No Of Copies Received:**
- **No of Parts Received:**

**Format**

- **Book**

**Unit Cost**

- **50.00**

**Discount**

- **0.00**

**Discount Type**

- **%**

**Item Status**

- **delete**

### Accounting Lines

**Accounting Lines**

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<thead>
<tr>
<th>Source</th>
<th>* Chart</th>
<th>* Account Number</th>
<th>Sub-Account</th>
<th>* Object</th>
<th>Sub-Object</th>
<th>Project</th>
<th>Org Ref Id</th>
<th>* Dollar ($)</th>
<th>* Percent</th>
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**Accounting Lines**

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<th>Sub-Account</th>
<th>Object</th>
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<th>Percent</th>
<th>Actions</th>
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<td>BTRP</td>
<td>PRAP</td>
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<td>28.83</td>
<td>100.00</td>
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### Vendor Info

**Vendor Address**

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<td>Vendor #</td>
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<td>Address 1</td>
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<tr>
<td>Address 2</td>
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<tr>
<td>Attention</td>
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<tr>
<td>Province</td>
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<td>Country</td>
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**Vendor Info**

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<thead>
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<tbody>
<tr>
<td>Acquisition Unit's Vendor account / Vendor info Customer #</td>
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<tr>
<td>Payment Terms</td>
<td></td>
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<tr>
<td>Check Stub Notes</td>
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<tr>
<td>Special Handling Instructions</td>
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### Invoice Info

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<tr>
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<tr>
<td>* Invoice Date</td>
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</tr>
<tr>
<td>* Vendor Invoice Amount</td>
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<tr>
<td>Payment Attachment Indicator?</td>
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<tr>
<td>Processed Date</td>
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<td>Extract Date</td>
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<td>Invoice Type</td>
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<td>Vendor Foreign Invoice Amount</td>
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<tr>
<td>Exchange Rate</td>
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**Process Items**

<table>
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<tr>
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<tr>
<td>Purchase Order</td>
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</table>
### Available Balances Lookup

**Fiscal Year:** 2015

**Chart Code:** LU

**Account Number:** 12345

**Sub-Account Number:** 67890

**Object Code:** PRAP

**Sub-Object Code:** 12345

**Consolidation Options:**
- Consolidation
- Detail
- Exclude Sub-Accounts

**Include Pending Ledger Entry:**
- No
- Approved
- All

---

**Item retrieved.**

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<th>Fiscal Year</th>
<th>Chart Code</th>
<th>Account Number</th>
<th>Sub-Account Number</th>
<th>Object Code</th>
<th>Sub-Object Code</th>
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<td>&quot;ALL&quot;</td>
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**Export options:** CSV | spreadsheet | XML
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<th>Sub-Account Number</th>
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<td></td>
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<tr>
<td>Order Import</td>
<td>Funding Source</td>
<td>INST</td>
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<td>Order Import</td>
<td>Cost Source</td>
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<td>Org Code</td>
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<td>Order Import</td>
<td>Default Location</td>
<td>LEHIGH/LINDIL-ORDER</td>
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Showing 1 to 10 of 62 entries
Data mapping for Batch profile

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<thead>
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<tbody>
<tr>
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<td>980 $q</td>
<td>Order Import</td>
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</tr>
<tr>
<td></td>
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<td>No Of Parts</td>
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<td></td>
<td>980 $m</td>
<td>Order Import</td>
<td>List Price</td>
</tr>
<tr>
<td></td>
<td>980 $b</td>
<td>Order Import</td>
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</tr>
<tr>
<td></td>
<td>980 $a</td>
<td>Order Import</td>
<td>Vendor Number</td>
</tr>
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</table>
### Holdings Location/Call Number Information

**Location:**
Type * for all locations, other letters for matching locations

**Prefix:** [LEHIGH/FM/FM-3-NORTH](#)  
**Call Number:** 324.7 M992b

**Shelving Order:** 324.70000000 M992 b 00001  
**Call Number Type:** Dewey Decimal Classification (DI)

### Items Location/Call Number Information

**Location:**
Type * for all locations, other letters for matching locations

**Prefix:** [LEHIGH/FM/FM-3-NORTH](#)  
**Call Number:** 324.7 M992b

**Shelving Order:** 324.70000000 M992 b 000001  
**Call Number Type:** Dewey Decimal Classification (DI)

### Item Information

**Item Id:** wic-1062391
**Barcode:** 39151010029722
**Barcode ARSL:**
**Former Identifiers:**
**Statistical Searching Codes:**

**Enumeration:**
**Chronology:**
**Copy Number:** 1
**Access Info (URI):**
**Temp Item Type:**
**Number Of Pieces:**

### Acquisition Information

**PO Number:** 5050  
**Vendor Line Item ID:**
**Fund:**
**Price:** 29
### Serial Receiving record

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<tr>
<th>Title</th>
<th>Business history review</th>
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<tbody>
<tr>
<td>Author</td>
<td></td>
</tr>
<tr>
<td>PO ID</td>
<td></td>
</tr>
<tr>
<td>Vendor Alias Name</td>
<td></td>
</tr>
<tr>
<td>Instance Record</td>
<td>who-520</td>
</tr>
<tr>
<td>Bound Location</td>
<td>LEHIGH/FM/FMII-2-SOUTH</td>
</tr>
<tr>
<td>Subscription Status</td>
<td>Currently received</td>
</tr>
<tr>
<td>Print Label</td>
<td>V</td>
</tr>
<tr>
<td>Claim</td>
<td></td>
</tr>
<tr>
<td>Copy Number</td>
<td></td>
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<tr>
<td>General Receiving Note</td>
<td>Publication cycle definition: 3.MD4.C1</td>
</tr>
<tr>
<td>* Receiving Record Type:</td>
<td>Main</td>
</tr>
<tr>
<td>ISSN</td>
<td>0007-6805</td>
</tr>
<tr>
<td>Publisher</td>
<td>Boston/Harvard Graduate School of Business Administration</td>
</tr>
<tr>
<td>Bib Record ID</td>
<td>9288</td>
</tr>
<tr>
<td>Vendor Name(s)</td>
<td></td>
</tr>
<tr>
<td>Call Number</td>
<td>Current periodical</td>
</tr>
<tr>
<td>UnBound Location</td>
<td>LEHIGH/FM/FMII-2-SOUTH</td>
</tr>
<tr>
<td>Serials Receipt Work Unit</td>
<td>LEHIGH</td>
</tr>
<tr>
<td>Public Display</td>
<td>V</td>
</tr>
<tr>
<td>Create Item</td>
<td></td>
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<tr>
<td>Urgent Note</td>
<td></td>
</tr>
<tr>
<td>Treatment Instruction Note</td>
<td>DO NOT BIND.</td>
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<tr>
<td>Claim Information</td>
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### Receive Enum/Chron Captions

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<th>Action Interval (for claim):</th>
<th>45</th>
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<tr>
<td>Action Date (for claim):</td>
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### Enumeration

<table>
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<th>L1</th>
<th>L2</th>
<th>L3</th>
<th>L4</th>
<th>L5</th>
<th>L6</th>
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</thead>
<tbody>
<tr>
<td>88</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
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</table>

### Chronology

<table>
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<tr>
<th>L1 (DATE)</th>
<th>L2</th>
<th>L3</th>
<th>L4</th>
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</thead>
<tbody>
<tr>
<td>SU2014</td>
<td></td>
<td></td>
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</table>
## Receipts from Serials Receiving

Unbound location: LEHIGH/FM/FM-2-SOUTH

### Main Receipt History

<table>
<thead>
<tr>
<th>Public Display</th>
<th>Enumeration</th>
<th>Chronology</th>
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</thead>
<tbody>
<tr>
<td>true</td>
<td>V.88:NO.2</td>
<td>SUM 2014</td>
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</tbody>
</table>

Show Serials Receiving Record
OLE Localization Issues

International Partners
SOAS Library Management System

OLE version 1.5.3
Localization - patron bill

![Patron Bill Lookup](image)

**Patron Bill Lookup**

- **Patron ID**
  - Search
  - Clear

- **First Name**
  - Last Name

- **Search**
- **Clear Values**
- **Cancel**

<table>
<thead>
<tr>
<th>Actions</th>
<th>Bill No.</th>
<th>Bill Date</th>
<th>Patron ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Total Amount</th>
<th>Text Note</th>
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</thead>
<tbody>
<tr>
<td>edit</td>
<td>1</td>
<td>13/02/2014</td>
<td>1234</td>
<td>James</td>
<td>Ross</td>
<td>£50.00</td>
<td></td>
</tr>
<tr>
<td>copy</td>
<td>10</td>
<td>15/02/2014</td>
<td>1234</td>
<td>Beth</td>
<td>Clark</td>
<td>£45.00</td>
<td></td>
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<tr>
<td>delete</td>
<td>6</td>
<td>13/02/2014</td>
<td>1234</td>
<td>James A-C</td>
<td>Wells</td>
<td>£2.00</td>
<td></td>
</tr>
<tr>
<td>delete</td>
<td>9</td>
<td>12/02/2014</td>
<td>1234</td>
<td>James A-D</td>
<td>Wells</td>
<td>£1.75</td>
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<tr>
<td>delete</td>
<td>11</td>
<td>15/02/2014</td>
<td>1234</td>
<td>Emma S</td>
<td>Wilson</td>
<td>£35.00</td>
<td></td>
</tr>
<tr>
<td>delete</td>
<td>12</td>
<td>13/02/2014</td>
<td>1234</td>
<td>Emma S</td>
<td>Wilson</td>
<td>£35.00</td>
<td></td>
</tr>
<tr>
<td>delete</td>
<td>2</td>
<td>12/02/2014</td>
<td>1234</td>
<td>Helen</td>
<td>Porter</td>
<td>£35.00</td>
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</tr>
<tr>
<td>delete</td>
<td>3</td>
<td>13/02/2014</td>
<td>1234</td>
<td>Helen</td>
<td>Porter</td>
<td>£35.00</td>
<td></td>
</tr>
<tr>
<td>delete</td>
<td>4</td>
<td>12/02/2014</td>
<td>1234</td>
<td>Helen</td>
<td>Porter</td>
<td>£35.00</td>
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</tr>
<tr>
<td>delete</td>
<td>5</td>
<td>13/02/2014</td>
<td>1234</td>
<td>Victoria</td>
<td>Bird</td>
<td>£35.00</td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 10 of 12 entries

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Portions of Kuali are copyrighted by other parties as described in the [acknowledgments](#) screen.
Localization - patron details
Localization - patron details
BIB details- search workbench
MARC fields - transliterated

<table>
<thead>
<tr>
<th>Data Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>042</td>
</tr>
<tr>
<td>100</td>
</tr>
<tr>
<td>245</td>
</tr>
<tr>
<td>260</td>
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<td>300</td>
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<td>440</td>
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<tr>
<td>610</td>
</tr>
<tr>
<td>700</td>
</tr>
<tr>
<td>910</td>
</tr>
<tr>
<td>915</td>
</tr>
</tbody>
</table>

![Image of MARC fields](image-url)
Development Directions

• Consortial & federated support
  - Record ownership
  - Multiple charts of account
  - Work units
• Distribute training & demonstration database
• Full ERM functions & GOKb bidirectional integration
• Code contribution governance & management
• Documentation portal
• Cloud implementations
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 outsource 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 2.0

• Inside HigherEd: Kuali Foundation Launches Commercial Service Partner

• JISC OSS Watch: Unpicking Kuali AGPL Strategy:
Ways to Participate in OLE

• Join the KOLE Community!
  • Determine your future
  • Invest within your community
• Be an adopter!
  • Gain benefits of community source
  • Provide value and feedback
• Be a Subject Matter Expert!
  • Define use cases
  • Write specifications
• Be a developer!
  • Sustain the software
  • Create new capabilities
**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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Growth</strong></td>
<td>Low</td>
<td>Mid</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td><strong>Income</strong></td>
<td>$925,000</td>
<td>$1,012,500</td>
<td>$1,100,000</td>
<td>$925,000</td>
</tr>
<tr>
<td><strong>Core staff</strong></td>
<td>$716,239</td>
<td>$716,239</td>
<td>$737,726</td>
<td>$737,726</td>
</tr>
<tr>
<td><strong>Marketing</strong></td>
<td>$18,500</td>
<td>$20,250</td>
<td>$22,000</td>
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<tr>
<td><strong>Development</strong></td>
<td>$190,261</td>
<td>$276,011</td>
<td>$361,761</td>
<td>$168,774</td>
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<tr>
<td><strong>Total</strong></td>
<td>$925,000</td>
<td>$1,012,500</td>
<td>$1,100,000</td>
<td>$925,000</td>
</tr>
</tbody>
</table>
Upcoming OLE Events

• Digital Library Federation 2014 – Kuali OLE Deep Dive (November)
• Kuali Days 2014 – Implementation Workshop (November)
• Charleston Conference 2014 (November)
• ALA Mid-Winter Meeting 2015 (January)
• ER&L (Electronic Resource and Libraries) 2015
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
Twitter at: @mcdonald | @kualiole