



Kuali OLE: A Collaborative ILS Partnership

Robert H. McDonald

Associate Dean for Library Technologies-Indiana University

Director Kuali OLE Community Development

@mcdonald | robert@kuali.org | @kualiole

<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?

The
Andrew W. Mellon
Foundation

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

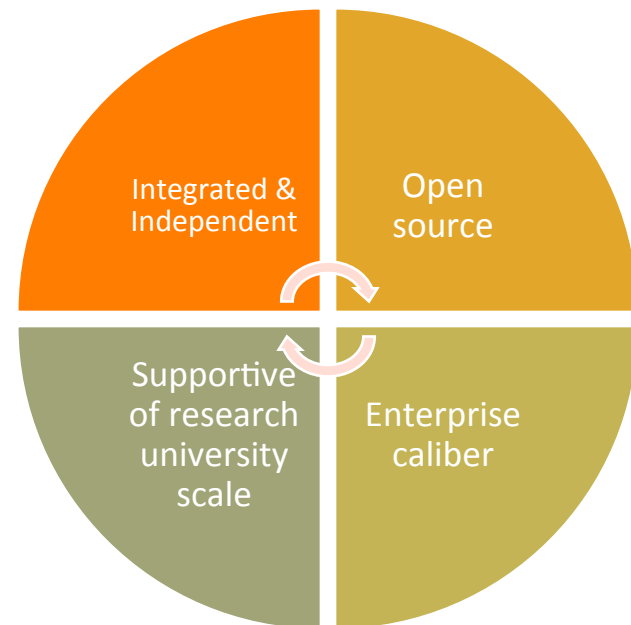


- SOAS-University of London/Winter 2015

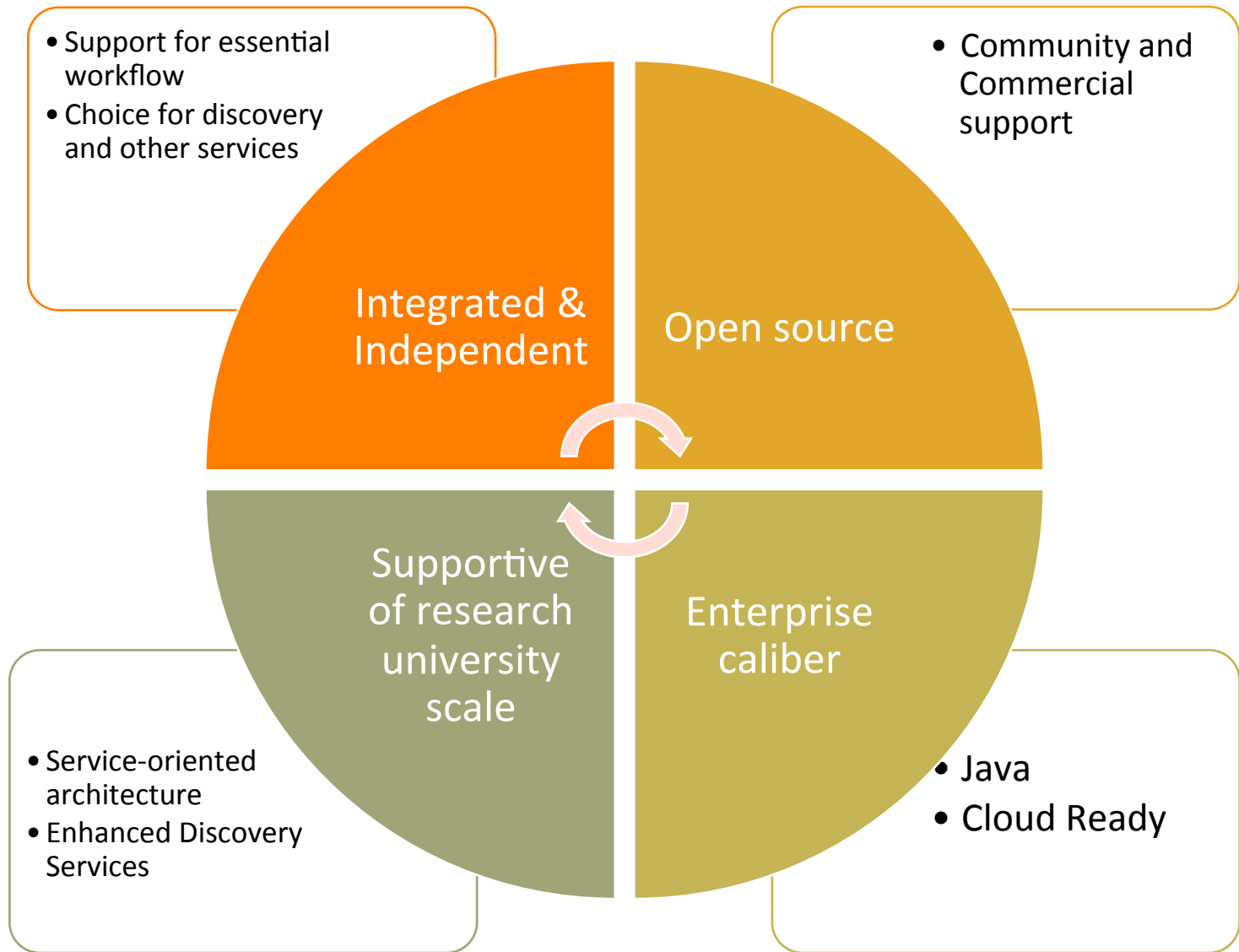


Kuali OLE is a Solution

- 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



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

```
import org.kuali.rice.coreservice.framework.parameter.ParameterService;

/**
 *
 */
public class LoadDefaultWorkflowsBean {
    private static final org.apache.log4j.Logger LOG = org.apache.log4j.Logger.getLogger(LoadDefaultWorkflowsBean.class);
    protected static final String LOAD_DEFAULT_WORKFLOW_IND = "LOAD_DEFAULT_WORKFLOW_IND";
    protected ParameterService parameterService;
    protected WorkflowFileHandler workflowFileHandler;

    public void unpackWorkflows( boolean forceLoad ) {
        if ( forceLoad || parameterService.getParameterValuesAsBoolean(OLEConstants.OLE_NMSPC, OLEConstants.OLE_CMPNT, LOAD
        _WORKFLOW_IND, Boolean.TRUE) ) {

            LOG.info("Starting Load of Default Workflows");
            workflowFileHandler.execute();
            LOG.info("Completed Load of Default Workflows");

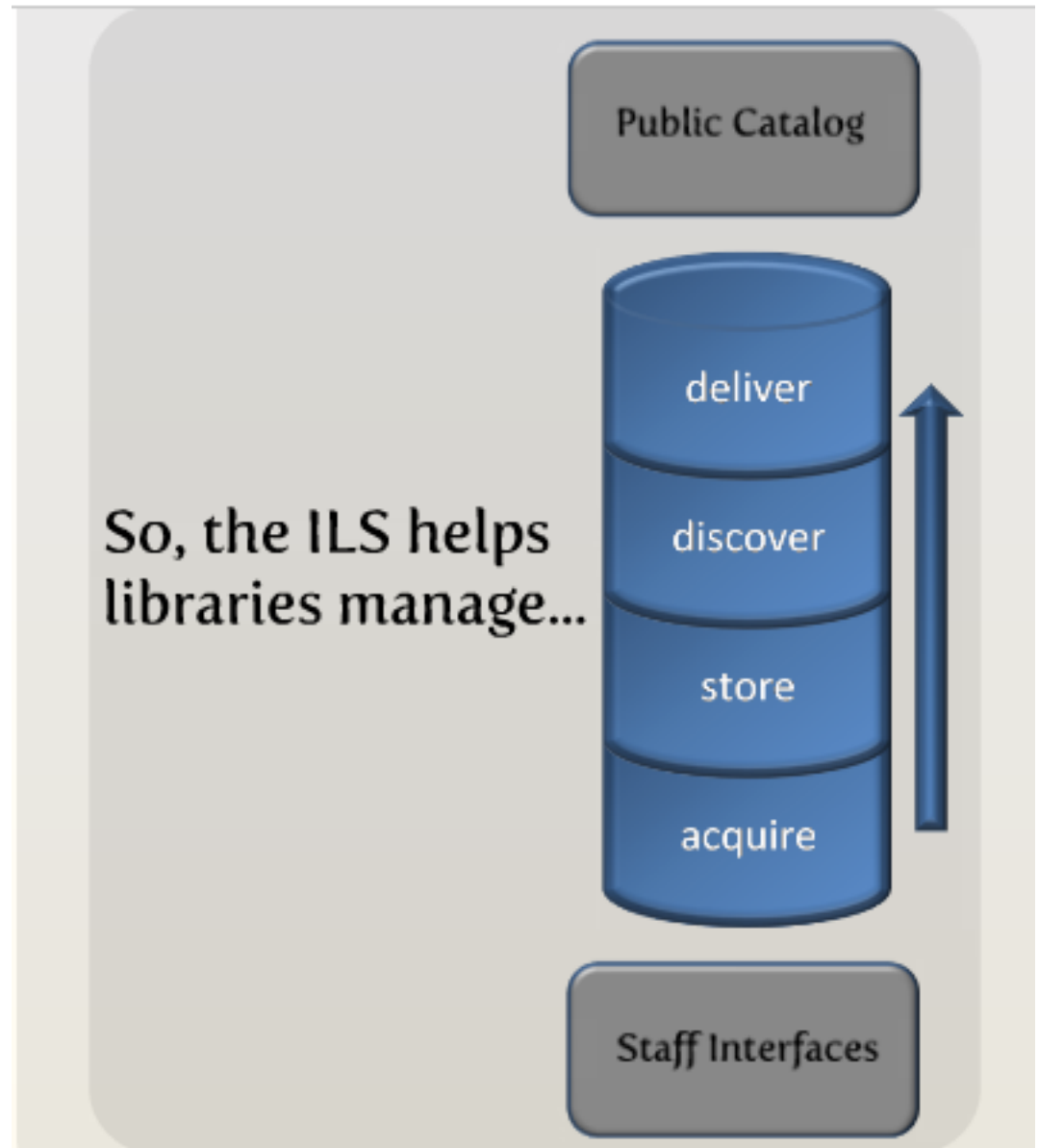
            Parameter existingParameter = parameterService.getParameter(OLEConstants.OLE_NMSPC, OLEConstants.OLE_CMPNT, LOAD
            _WORKFLOW_IND);
            if ( existingParameter != null ) {
                Parameter.Builder updatedParameter = Parameter.Builder.create(existingParameter);
                updatedParameter.setValue("N");
                parameterService.updateParameter(updatedParameter.build());
            } else {
                Parameter.Builder newParameter = Parameter.Builder.create(OLEConstants.APPL_ID, OLEConstants.OLE_NMSPC, OLECo
                s.OLE_CMPNT, LOAD_DEFAULT_WORKFLOW_IND, ParameterType.Builder.create("CONFIG"));
                newParameter.setDescription( "Set to 'Y' to have the application ingest the default circulation policies upon
                startup." );
                newParameter.setValue("N");
                parameterService.createParameter(newParameter.build());
            }
        }
    }

    public void setWorkflowFileHandler(WorkflowFileHandler workflowFileHandler) {
        this.workflowFileHandler = workflowFileHandler;
    }

    public void setParameterService(ParameterService parameterService) {
        this.parameterService = parameterService;
    }
}
```

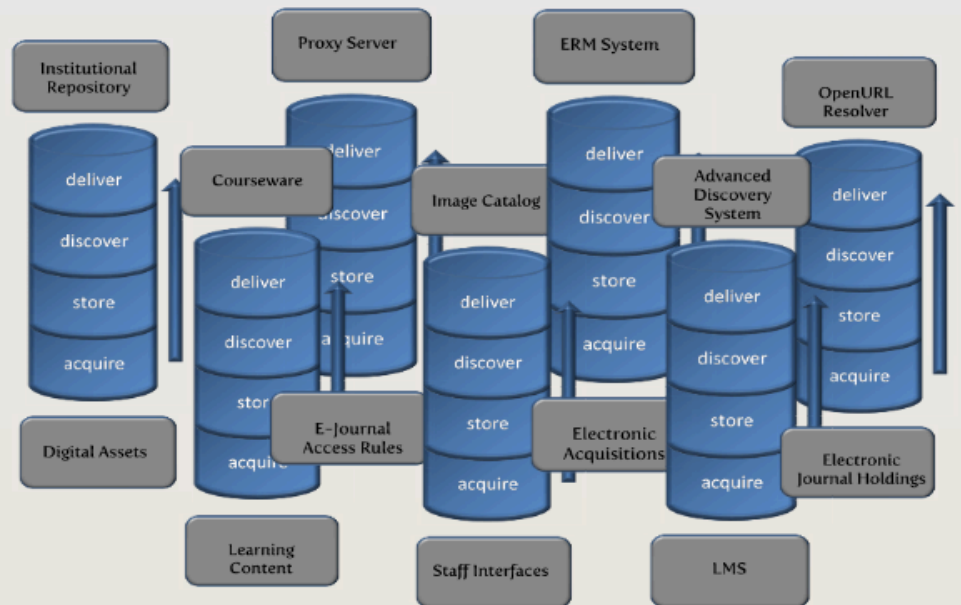


The Current ILS



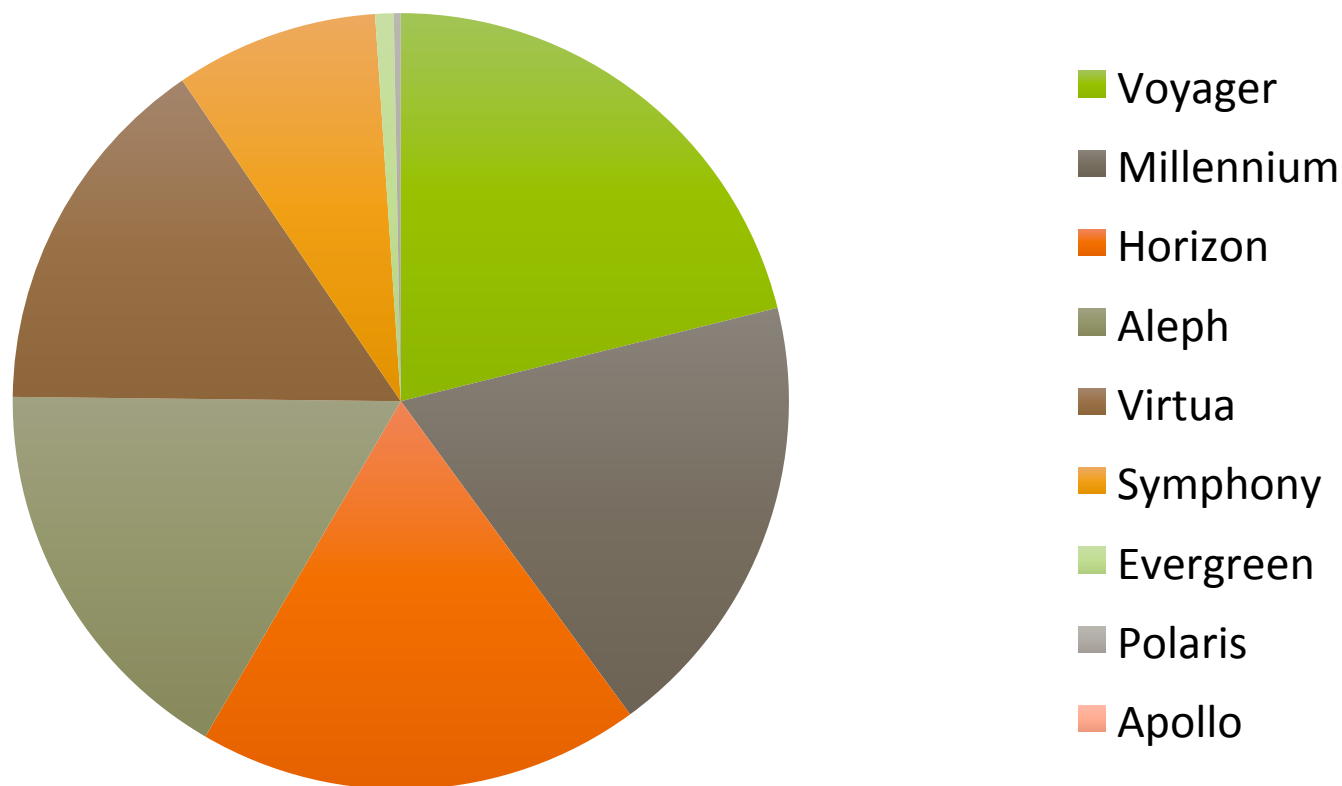
The Next Generation Library Eco-System

Only a part of the total workflow ...



In Transition: The Current Library Management System Landscape

Systems of Libraries Considering Migration 2013

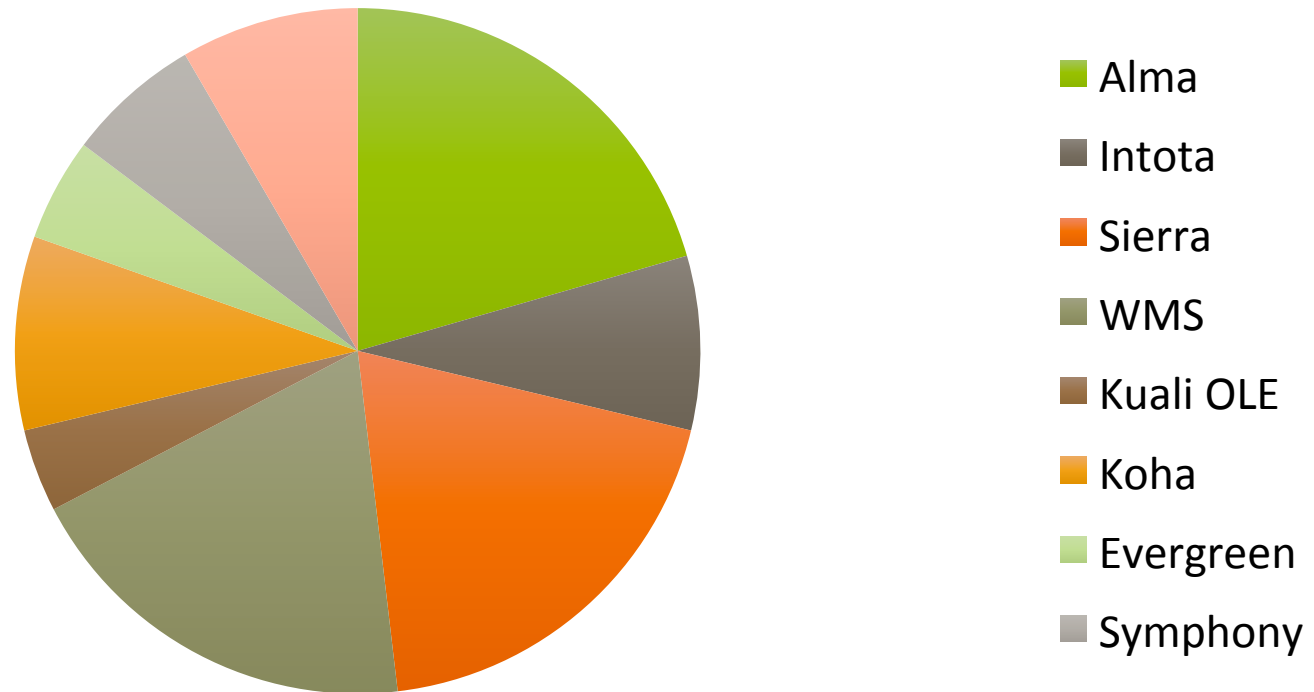


- Perceptions 2013: An International Survey of Library Automation – Marshall Breeding <http://www.librarytechnology.org/perceptions2013.pl>



In Transition: The New Library Management System Landscape

Candidate Systems Considered for 2013



- Perceptions 2013: An International Survey of Library Automation – Marshall Breeding <http://www.librarytechnology.org/perceptions2013.pl>

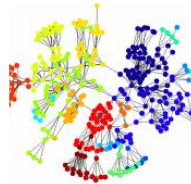


Characteristics of Kuali OLE Org Fit



Technical Expertise

Collaborative
Community



Open Software –
Commercial
Support

Code Contributors



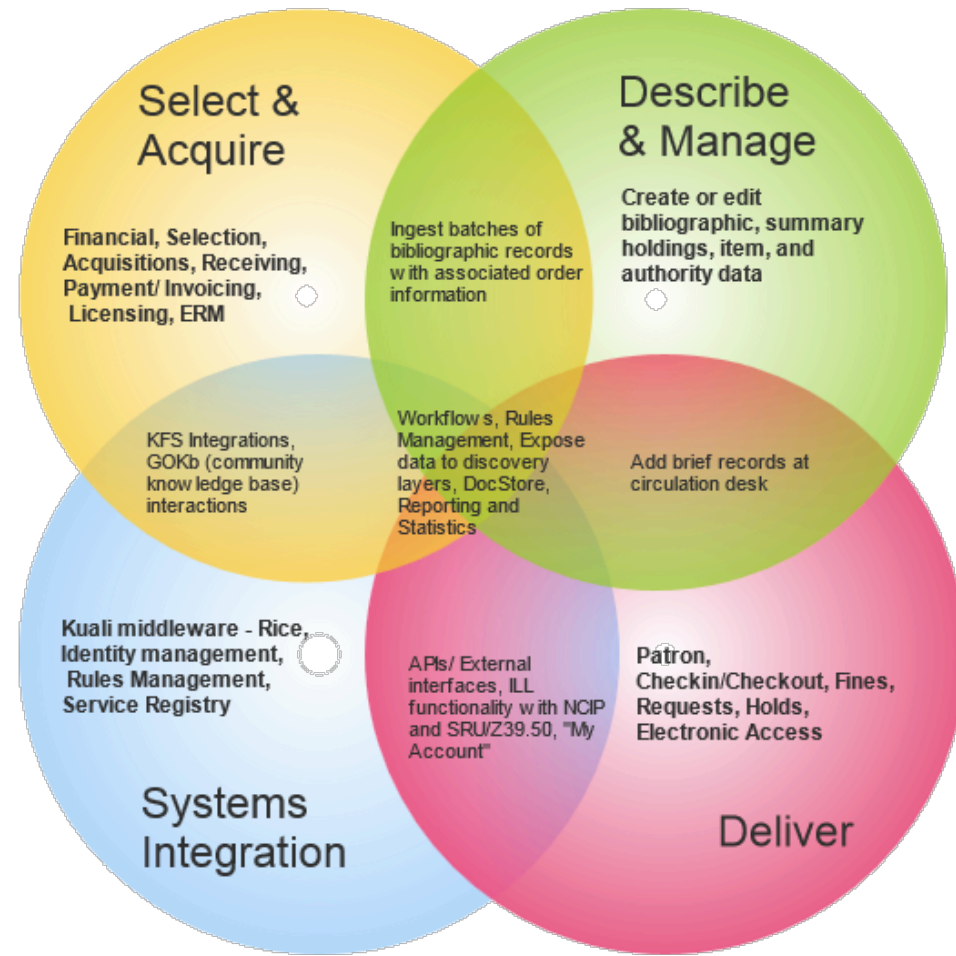
Code Implementers

- 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)



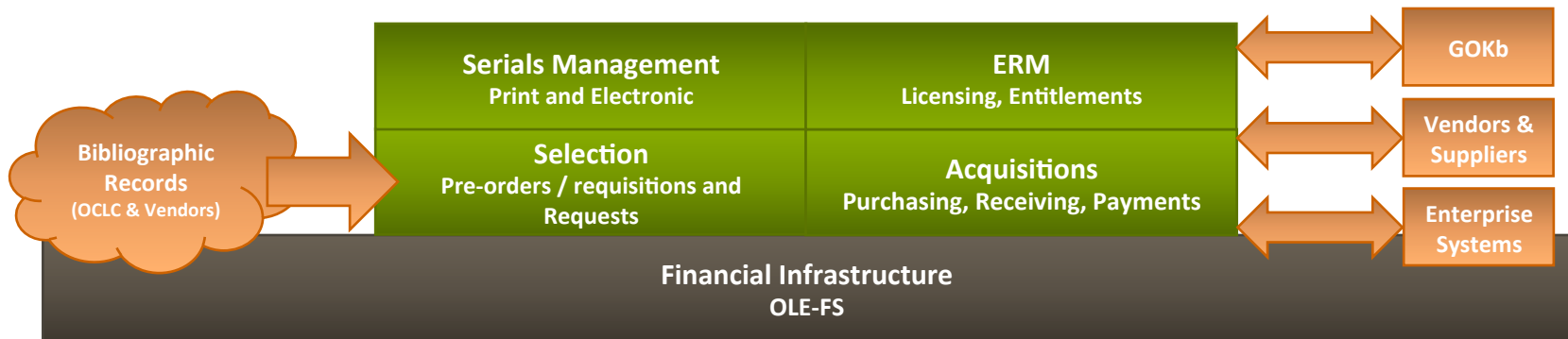
Kuali OLE Functional Architecture

- Four functional modules
- Overlapping functionality
- Iterative and maturing capabilities
- Open architecture and code
- Built on Kuali enterprise architecture



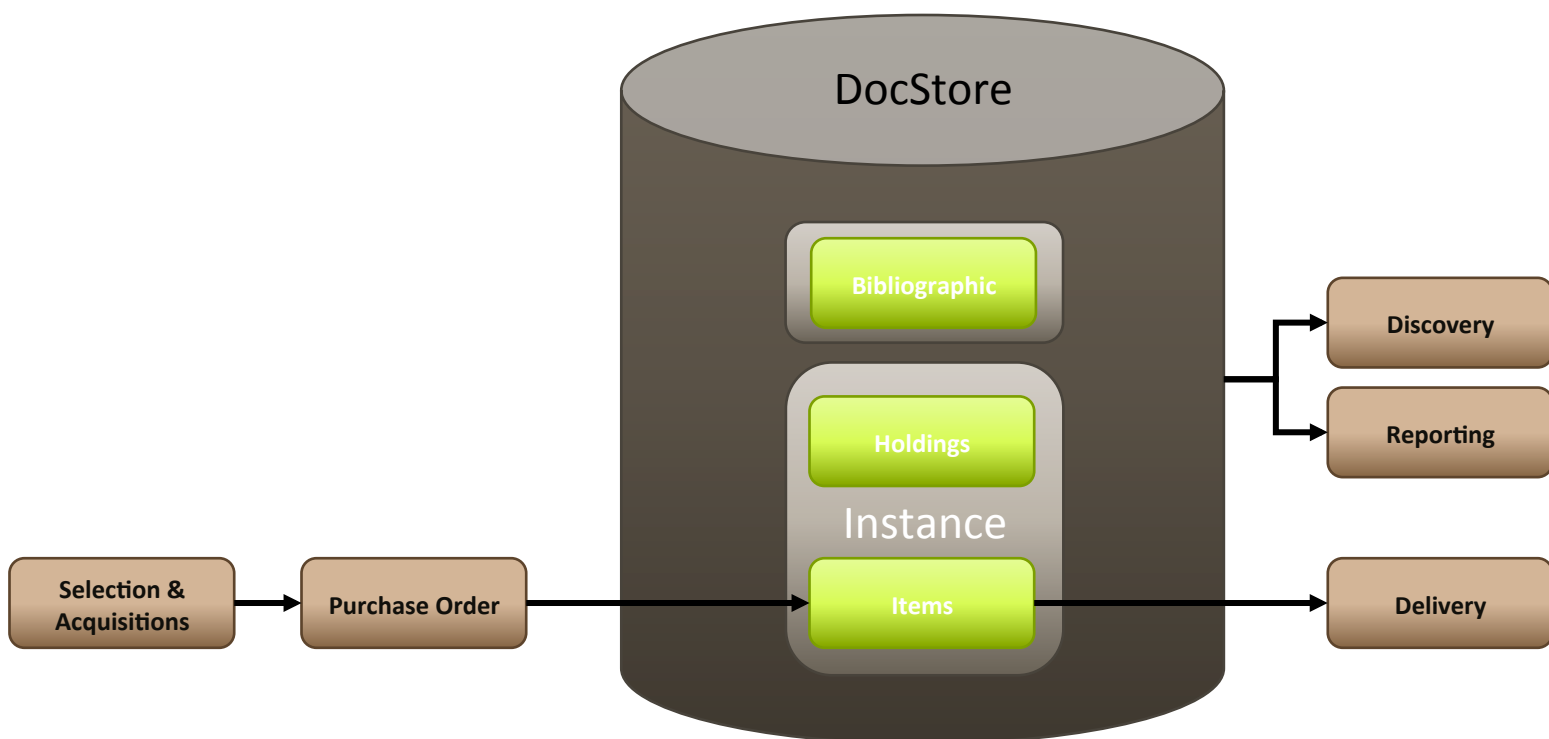
Functional Architecture – Select & Acquire

- Select & Acquire – <http://www.kuali.org/ole/modules/select-acquire-entity>



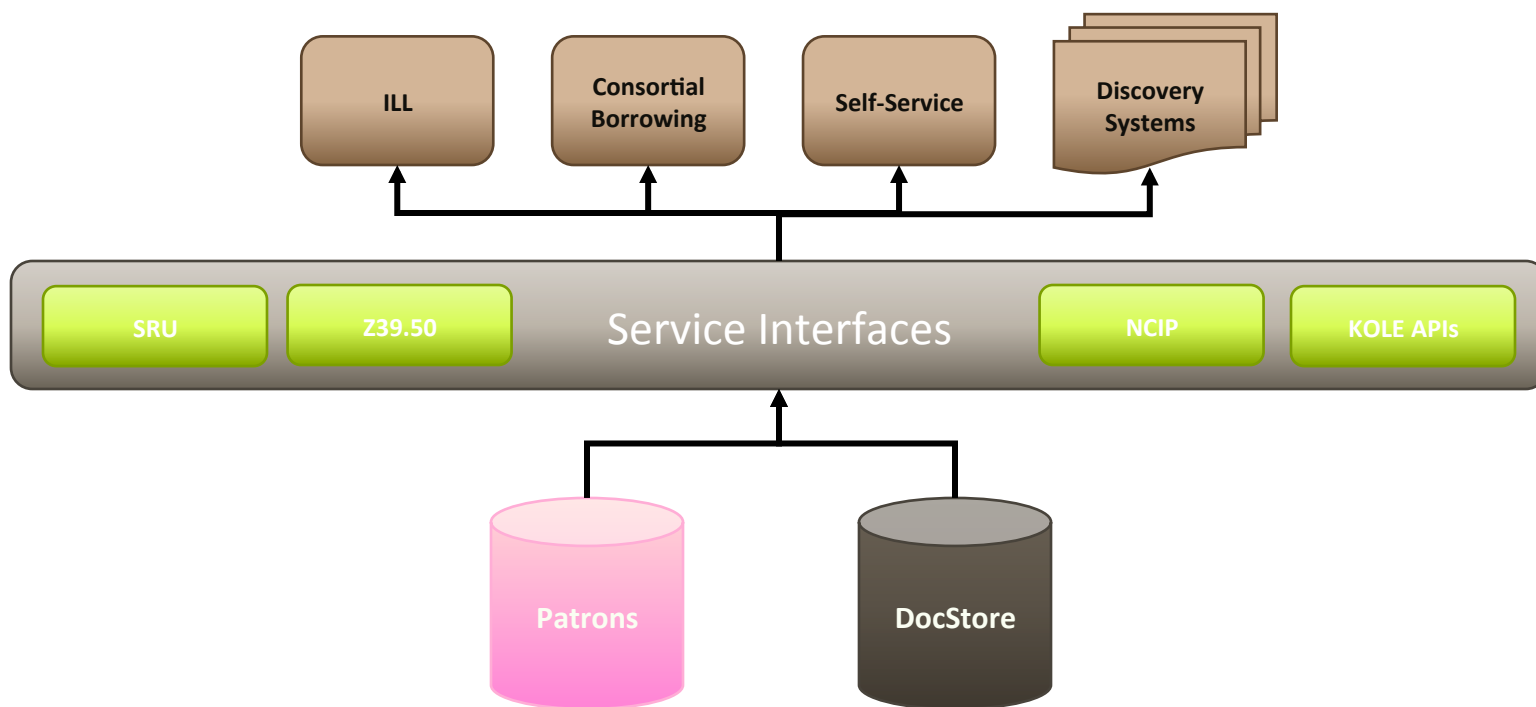
Functional Architecture - Describe

- Describe – <http://www.kuali.org/ole/modules/describe-manage-entity>



Functional Architecture - Delivery

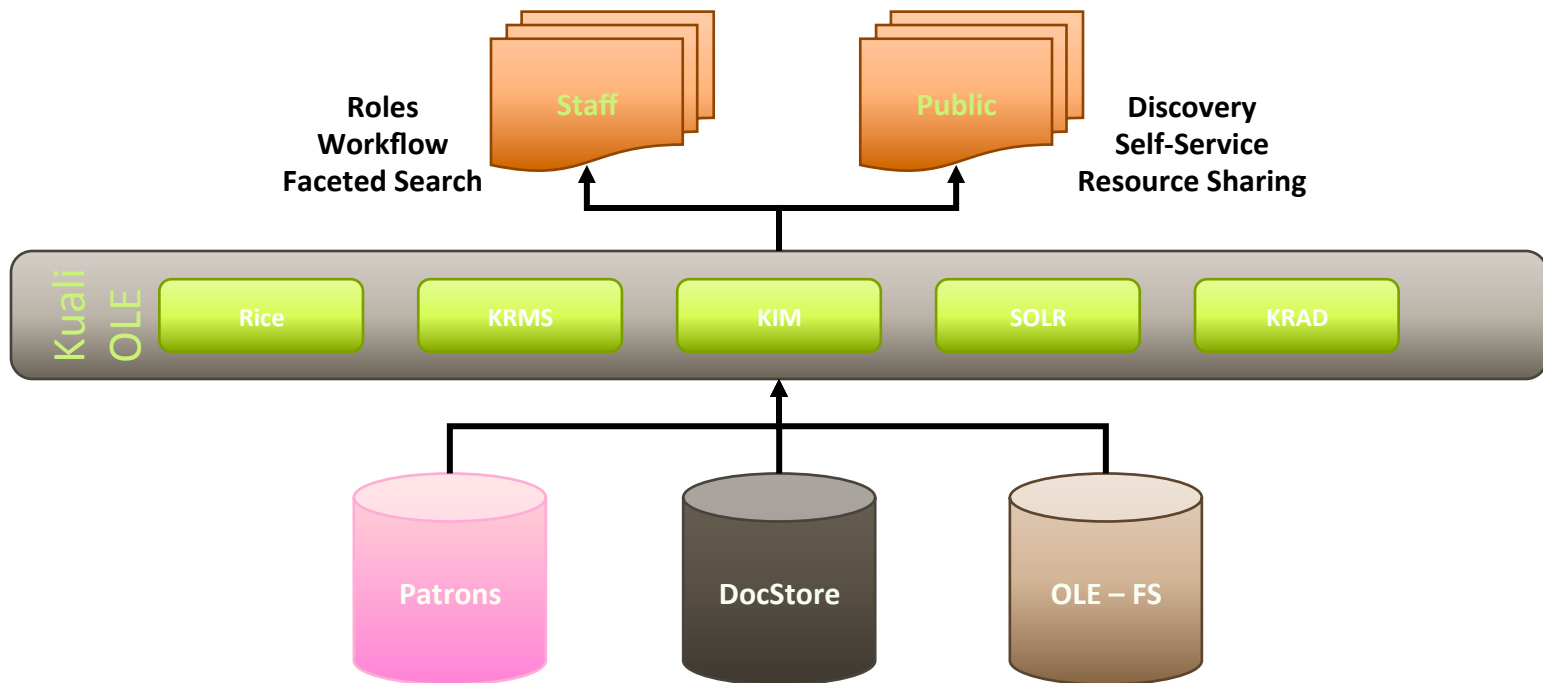
- Deliver – <http://www.kuali.org/ole/modules/deliver-entity>



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 Quali 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

OLE Release 1.5							April 17, 2014
Jira No.	Jira Summary		Orig Dev Estimate	1.5 Dev Hrs	Dev Hrs Remain	Dev Hrs Used	Comments on Status
Total Hours for OLE Release 1.0			7102	11810	0	11810	
Milestone 1			2130	7156	0	7156	
OLE-4010	Docstore - Sys	SII	672	1912	0	1912	CLOSED
OLE-4323	MySQL 5.6.12 - Developer Local	SII	140	119	0	119	CLOSED
OLE-4540	UI Portal Updates	xModule	28	54	0	54	CLOSED
OLE-4630	Rice 2.3.2 Upgrade - KRAD	SII	280	734	0	734	CLOSED
OLE-5271	Docstore - Data Model Refactor	SII	120	67	0	67	CLOSED
OLE-5391	POM Upgrade - Current Kuali	CM					Peri - Complete CLOSED
OLE-5602	Schema Unification (Single)	SII					Peri - Complete CLOSED
Various	15% Time for 1.0 bug fixes	CM	890	4270	0	4270	CLOSED
Milestone 2			3000	2794	0	2794	
OLE-2655	Claim Unfulfilled Orders	S&A	392	186	0	186	CLOSED
OLE-2688	Automated Retrieval System API	SII	490	193	0	193	CLOSED
OLE-2677	Clickable URL in Bib & Holding	Describe	56	28	0	28	CLOSED
OLE-2760	Print pull call slips for retrieval	Deliver	28	28	0	28	CLOSED
OLE-2768	Donor Code in PO	S&A	80	303	0	303	CLOSED
OLE-2948	Bib-Instance Change for PURAP	S&A	364	452	0	452	CLOSED
OLE-3794	Fund, Currency and Payment	S&A	560	382	0	382	CLOSED
OLE-4139	Missing Pieces, Damage, Claims	Deliver	56	178	0	178	CLOSED
OLE-4242	Bib Editor Enhancements	Describe	504	182	0	182	CLOSED
OLE-4245	Invoicing Enhancements 1.5 -	S&A	308	380	0	380	CLOSED
OLE-4260	Operator Warning at Checkout -	Deliver	28	18	0	18	CLOSED
OLE-4467	Need ability to determine which	Deliver	28	0	0	0	CLOSED
OLE-4470	Printing of routing and hold slips	Deliver	56	53	0	53	QA Review
OLE-4901	Deliver Permissions	Deliver	60	28	0	28	CLOSED
OLE-5067	Bulk Load Testing - Chicago	SII	0	291	0	291	CLOSED
OLE-5392	Tomcat 7 Upgrade	CM		14	0	14	CLOSED
OLE-5411	Bread Crumbs	xModule		64	0	64	CLOSED
OLE-5691	Docstore Schema Naming	SII		14	0	14	CLOSED
Milestone 3			1808	1506	0	1506	
OLE-2686	Global changes to Instance	Describe	224	278	0	278	CLOSED
OLE-3267	Item Attached to Multiple	Describe	168	203	0	203	CLOSED
OLE-3774	Block Renewal	Deliver	28	21	0	21	CLOSED
OLE-3818	Allow Staff Operator to Edit Hold	Deliver	28	0	0	0	CLOSED
OLE-4160	Modification to the workflow for	Deliver	56	7	0	7	Deferred to future release
OLE-4287	Docstore Search - Framework	xModule	672	203	0	203	CLOSED
OLE-4474	Import Profile 9xx Data for Orders	xModule	160	299	0	299	CLOSED
OLE-4657	Circulation and My Account API	SII	120	47	0	47	Deferred Testing to future release
OLE-5111	Docstore - eResource Data Model	SII	240	91	0	91	CLOSED
OLE-5235	Import Multiple eInstance for Bib	SII	112	77	0	77	CLOSED
OLE-5389	Licensing to RDBMS - Abandon	SII	112	112	0	112	CLOSED
OLE-5511	Standardize Headers	xModule		42	0	42	CLOSED
OLE-5642	Loaders for Serials	SII		126	0	126	QA Review
Configuration Management & Other			164	354	0	354	
OLE-4377	Bootstrap vs. Demo Data Set	CM					Configuration Management CLOSED
OLE-5760	Retain Test Data at Deploy	CM					Configuration Management CLOSED
OLE-4413	Test Drive Data Refresh Job	CM					Configuration Management CLOSED
OLE-4629	Patron Code Base Clean Up	Deliver	84	172	0	172	FM/DM to Review
OLE-5313	Roles & Permissions	SII	80	182	0	182	FM/DM to Review
OLE-5692	Dev Environment Latency	CM					Configuration Management FM/DM to Review
OLE-4300	Reinstate Unit Test Framework	CM					Configuration Management FM/DM to Review
Release Packaging							
	Technical Documentation						
	Licensing Audit						
	Packaging						
Available Hours Remaining				0			
Estimated Hrs of Work to Complete				0			
Balance of Hours (Deficit)				0			



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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	Packaging						
Available Hours Remaining				0			
Estimated Hrs of Work to Complete				0			
Balance of Hours (Deficit)				0			



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

```
<?xml version="1.0"?>
<agendas>
  <agenda> <!--General Checks: rules to validate Patron (generalBlock,
expiration date, address, barcode, and, if proxy, a rule for proxy expiration
date check-->
    <name>General Checks</name>
    <rules>
      <rule> <!--GeneralBlock: if generalBlock=true then display error
message-->
        <name>isGeneralBlock</name>
        <oleProposition> <!--if generalBlock=true-->
          <type>simple</type>
          <simpleProposition>
            <term>
              <type>java.lang.String</type>
              <value>generalBlock</value>
            </term>
            <operator>=</operator>
            <values>
              <value>
                <type>java.lang.String</type>
                <name>true</name>
              </value>
            </values>
          </simpleProposition>
        </oleProposition>
        <trueActions> <!--then display error message-->
          <action>
            <name>errorAction</name>
            <parameter>
              <name>errorMessage</name>
              <value>This patron has a general block</value>
            </parameter>
          </action>
        </trueActions>
      </rule>
      <rule> <!--PatronMembershipExpirationDate: if patron expiration
date
```



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

```
<?xml version="1.0"?>
<agendas>
  <agenda> <!--General Checks: rules to validate Patron (generalBlock,
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        <oleProposition> <!--if generalBlock=true-->
          <type>simple</type>
          <simpleProposition>
            <term>
              <type>java.lang.String</type>
              <value>generalBlock</value>
            </term>
            <operator>=</operator>
            <values>
              <value>
                <type>java.lang.String</type>
                <name>true</name>
              </value>
            </values>
          </simpleProposition>
        </oleProposition>
        <trueActions> <!--then display error message-->
          <action>
            <name>errorAction</name>
            <parameter>
              <name>errorMessage</name>
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            </parameter>
          </action>
        </trueActions>
      </rule>
      <rule> <!--PatronMembershipExpirationDate: if patron expiration
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```



Consortial Implementations

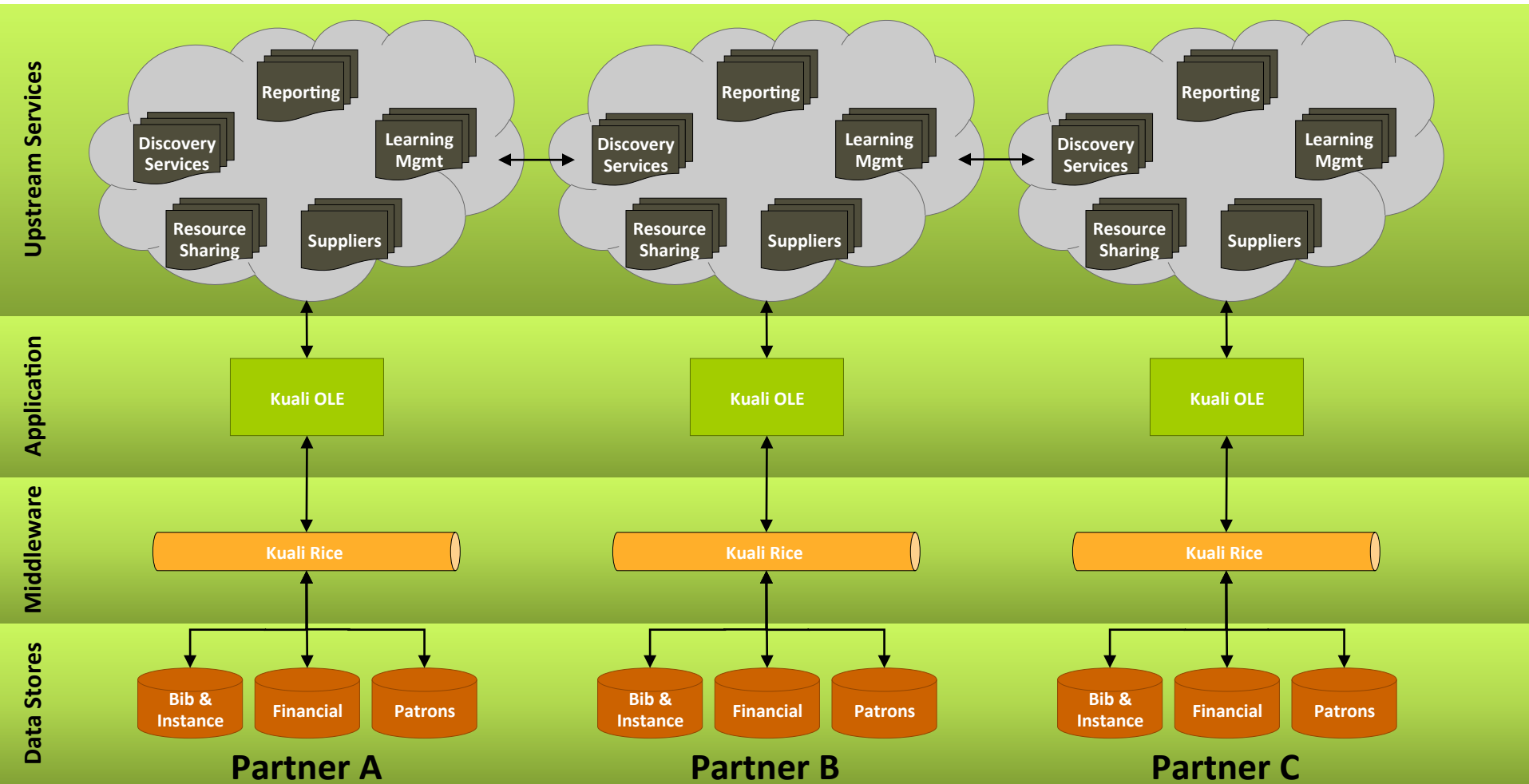


Kirjastoverkkopäivät – National Library Days – Helsinki, Finland
October 22, 2014

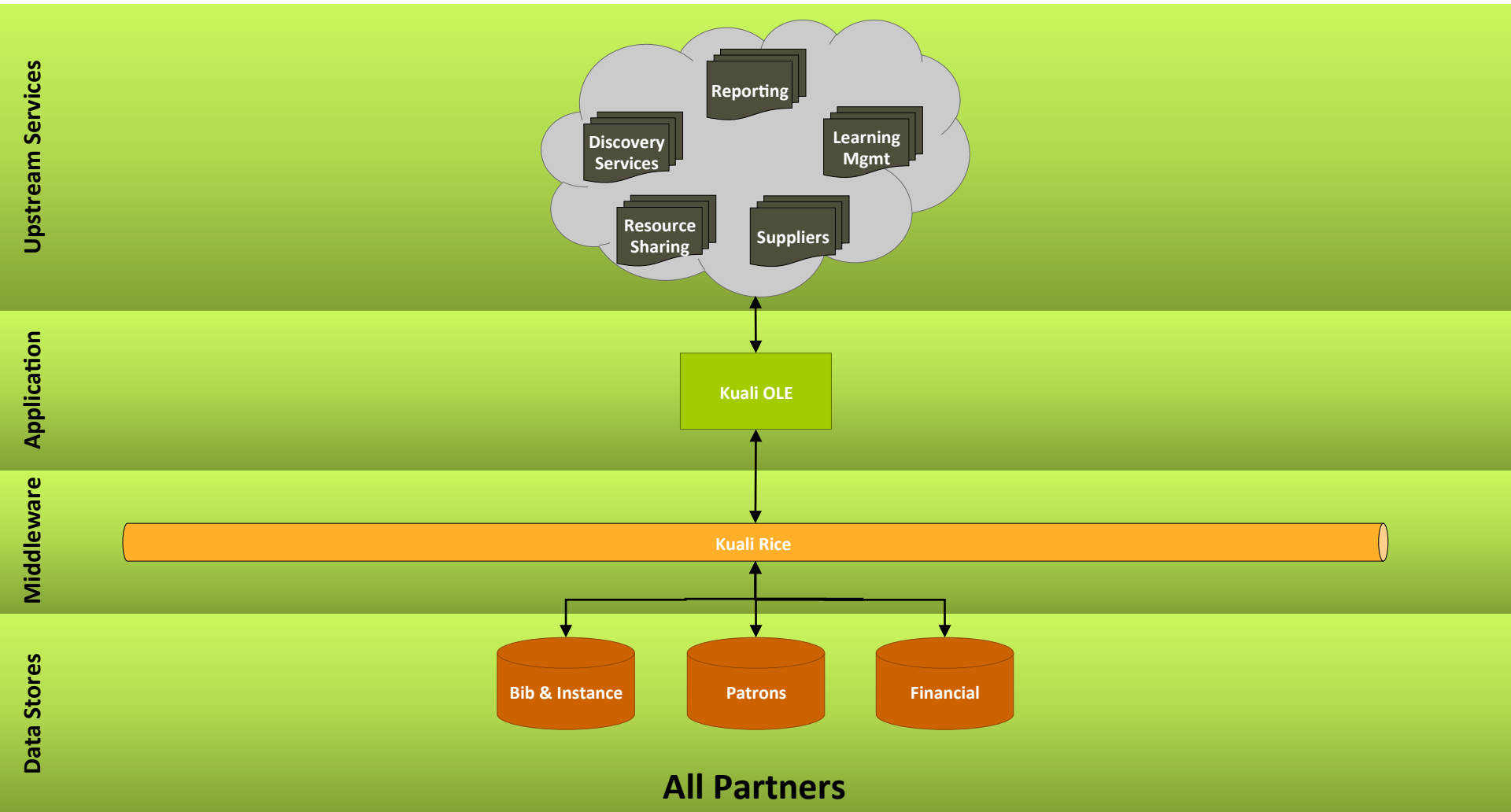
#kualiolo | @kualiolo



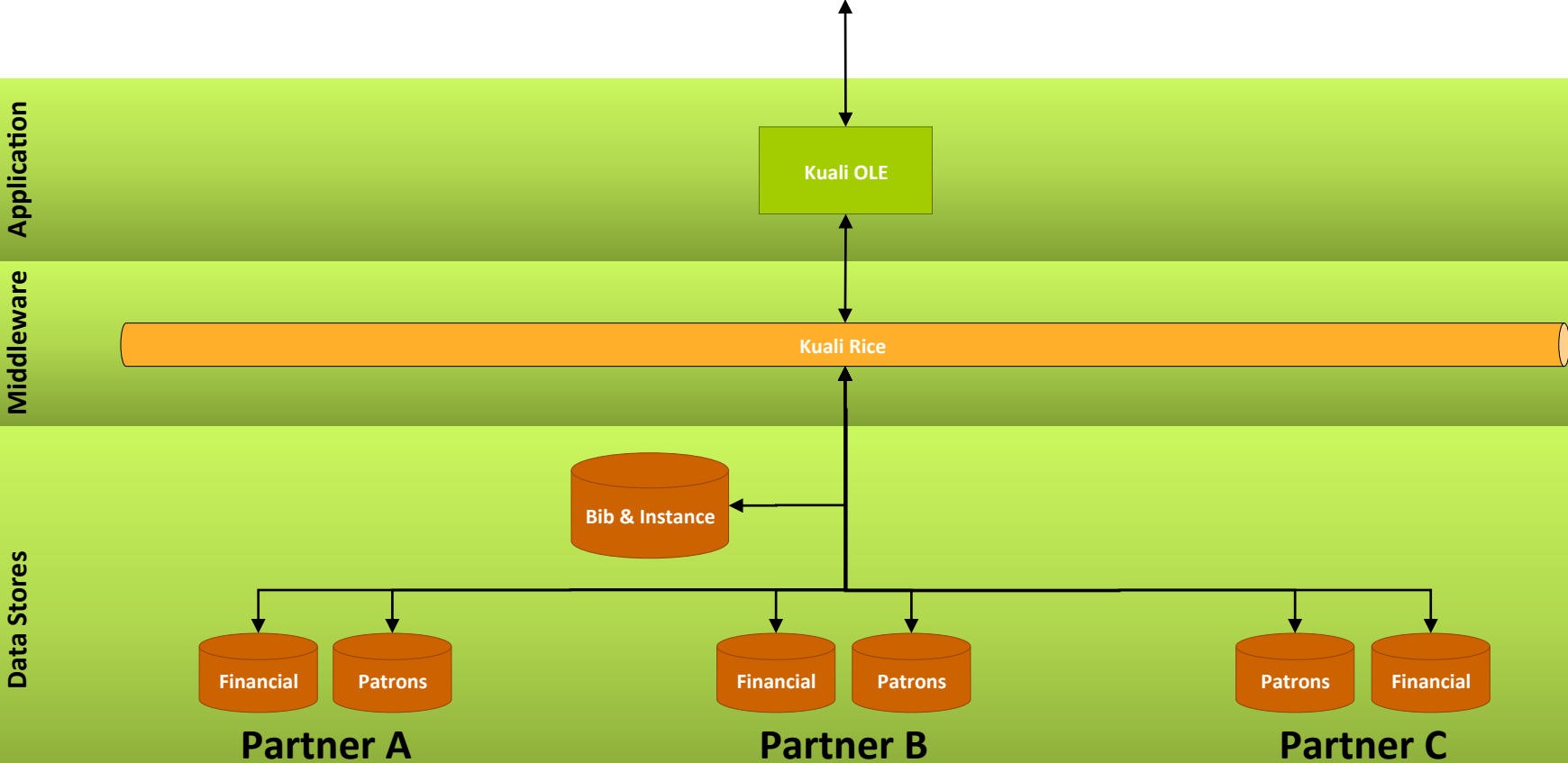
Separate Full Stacks



Shared System

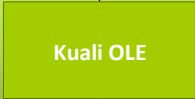


Shared Describe



Shared Describe & Deliver

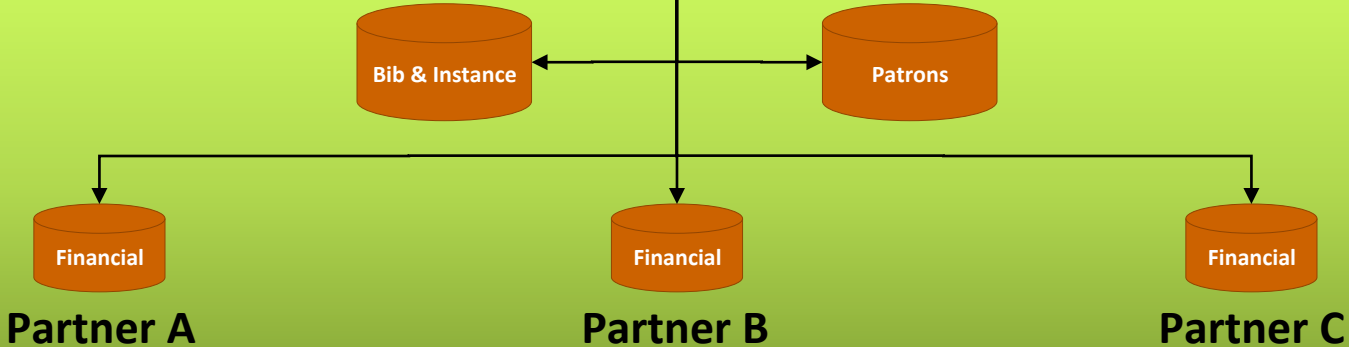
Application



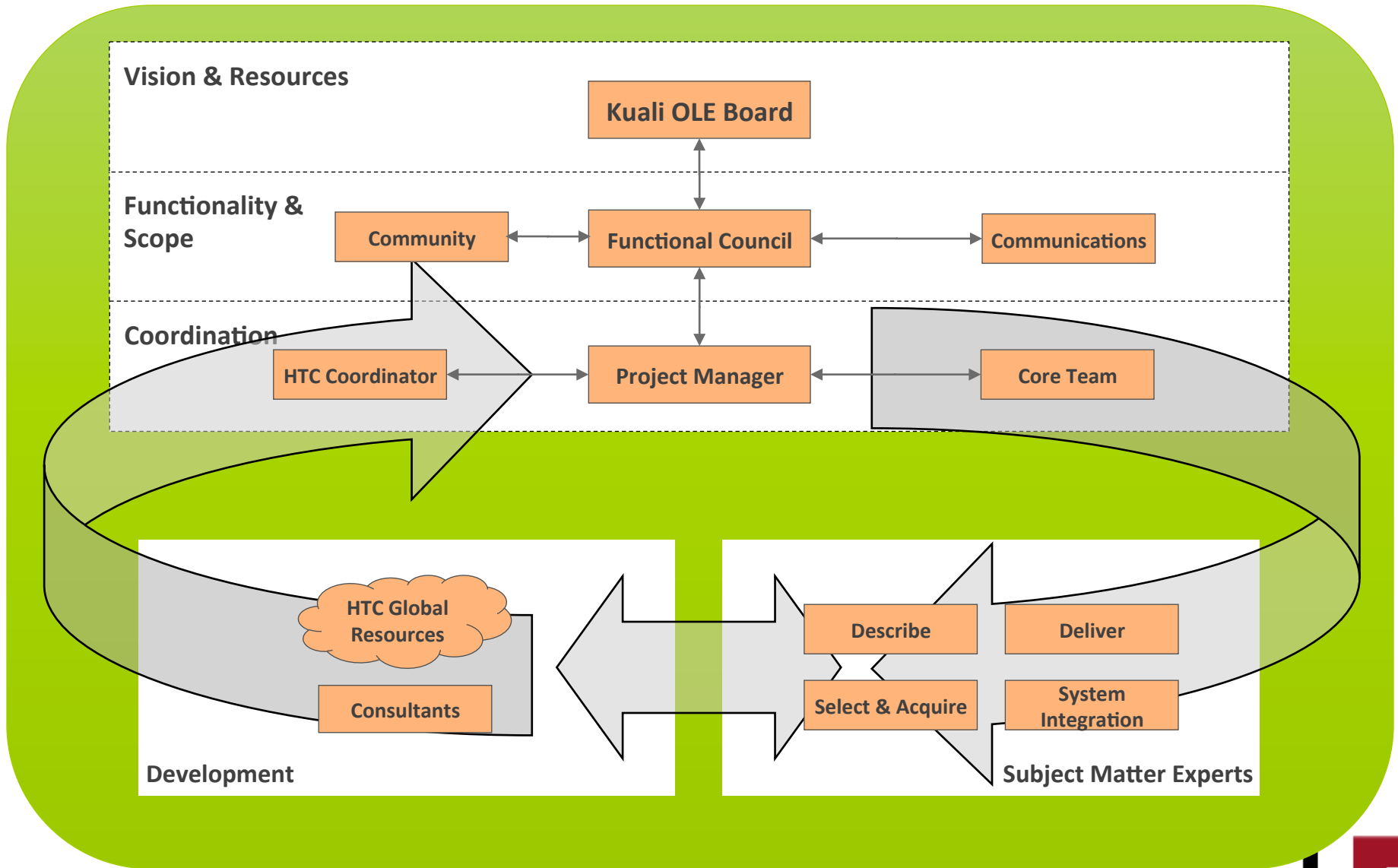
Middleware



Data Stores



Kuali OLE Organization



OLE Collaborators/Commercial Affiliates



Examples

The Andrew W. Mellon Foundation



Kuali : the newest addition to EBSCO's suite of ILS Partners

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.



EBSCO has been a KCA since March 2013



Supported 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.



Kirjastoverkkopäivät – National Library Days – Helsinki,
Finland
October 22, 2014

Expected release 2014
www.ebsco.com

The Global Open Knowledgebase (GOKb)



- Andrew W. Mellon Grant, April 2012-March 2014
- Knowledgebase for Quali 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



Kirjastoverkkopäivät – National Library Days – Helsinki, Finland
October 22, 2014

#kualiote | @kualiote



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 ?



 [action list](#)

 [doc search](#)

 [search workbench](#)

Ordering

REQUISITIONS

[Create](#)

[Search](#)

PURCHASE ORDERS

[Search](#)

[Order Holding Queue](#)

Paying

INVOICES

[Create](#)

[Search](#)

CREDIT MEMOS

[Create](#)

[Search](#)

PAYMENT REQUESTS

[Search](#)

Fund

[Fund Balances](#)

BUDGET ADJUSTMENT

[Create](#)

[Search](#)

TRANSFER OF FUNDS

[Create](#)

[Search](#)

Vendor

[Create](#)

[Search](#)

Electronic Resources

REQUISITION

Titles ▼ hide

Add Item ? ← ←

Bib Info:	<input type="radio"/> new bib <input type="radio"/> existing bib	<input checked="" type="radio"/> print holdings <input type="radio"/> e-holdings		Location	<input type="text"/>	Copy #	<input type="text"/>				
* No of Copies Ordered	<input type="text" value="1"/>	* No of Parts Ordered	<input type="text" value="1"/>	* List Price	<input type="text" value="0.00"/>	Extended Cost	0.00	Public View	<input checked="" type="checkbox"/>	Do Not Claim	<input type="checkbox"/>
Receipt Status		No Of Copies Received		No of Parts Received		Item Price Source	<input type="text" value="Publisher"/>	Request Source	<input type="text" value="Staff"/>	Claim Date	<input type="text"/>
Format	<input type="text"/>	Category	<input type="text"/>	Vendor Item Identifier	<input type="text"/>	Requestor	<input type="text"/>	Route To Requestor	<input type="text"/>		<input type="text"/>
* Unit Cost		Discount	<input type="text"/>	Discount Type	<input type="text" value="%"/>	Item Status	<input type="text"/>	<input type="button" value="add"/>			

Current Items



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		Copy #		
* No of Copies Ordered	<input type="text" value="1"/>	* No of Parts Ordered	<input type="text" value="1"/>	* List Price	<input type="text" value="50.00"/>	Extended Cost	50.00	Public View	<input checked="" type="checkbox"/>	Do Not Claim	<input type="checkbox"/>
Receipt Status		No Of Copies Received		No of Parts Received		Item Price Source	Publisher	Request Source	Staff	Claim Date	
Format	Book	Category		Vendor Item Identifier		Requestor		Route To Requestor	<input type="checkbox"/>		
Unit Cost	50.00	Discount	<input type="text" value="0.00"/>	Discount Type	%	Item Status		<input type="button" value="delete"/>			


show Notes

hide Accounting Lines

Accounting Lines									
Source									
* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Dollar \$	* Percent	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			<input type="text" value="0.00"/>	<input type="button" value="add"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			<input type="text" value="0.00"/>	<input type="button" value="add"/>
LU	BHIS	<input type="text"/>	PRAP	<input type="text"/>	<input type="text"/>		50.00	100.00	<input type="button" value="delete"/> <input type="button" value="bal inquiry"/>
Lehigh University	History		Approval Print Book						

show Donor



Purchase Order 

Doc Nbr: 59385	Status: FINAL
Initiator: ole-quickstart	Created: 12:43
Purchase Order #: 5050	Purchase Order Doc Status: Closed

[expand all](#) [coll](#)
* requi



Document Overview [hide](#)

Document Overview

*** Description:** Library Material_ec_0923141240

Organization Document Number:

Explanation:

Financial Document Detail

*** Year:** 2015 **Total Amount:** 28.83

Purchase Order Detail

* Chart/Org: LU / LIB	* Funding Source: INSTITUTION ACCOUNT <input type="text"/>
Receiving Required: No	Payment Request Positive Approval Required: No
Assigned To User:	Previous Purchase Order #:
Order Type: Approval	Purchase Order Confirmed Indicator: No
	Requisition Source: DIRECT INPUT

Delivery [show](#)

Vendor [show](#)

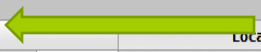
Stipulations [show](#)

Titles [hide](#)

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		Copy #	
* No of Copies Ordered	1	* No of Parts Ordered	1	* List Price	34.95	Extended Cost	28.83	Public View	<input checked="" type="checkbox"/>	Do Not Claim
Receipt Status	Fully Received	No Of Copies Received	1	No Of Parts Received	1	Item Price Source	Vendor	Request Source	Staff	Claim Date
Format		Category		Vendor Item Identifier		Requestor		Route To Requestor	No	
Unit Cost	28.83	Discount	17.50	Discount Type	%	Item Status	On Order			



[show](#) Notes

[hide](#) Accounting Lines

Accounting Lines  [hide deta](#)

Source

* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Dollar \$	* Percent	Actions
LU Lehigh University	BIRP I.R. & Pol. Sci.		PRAP Approval Print Book				28.83	100.00	

▼ Vendor Info

Vendor Address

* Vendor:	<input type="text"/>	←	City:	<input type="text"/>
Vendor #:	<input type="text"/>		State:	<input type="text"/>
Address 1:	<input type="text"/>		Province:	<input type="text"/>
Address 2:	<input type="text"/>		Postal Code:	<input type="text"/>
Attention:	<input type="text"/>		Country:	<input type="text"/>

Vendor Info

Acquisition Unit's Vendor account / Vendor Info Customer #:	<input type="text"/>	Q	Payment Terms:	<input type="text"/>
Check Stub Notes:	<input type="text"/>		Special Handling Instructions:	<input type="text"/>
	<input type="text"/>			<input type="text"/>
	<input type="text"/>			<input type="text"/>

▼ Invoice Info

Vendor Invoice Number:	<input type="text"/>	Pay Date:	<input type="text"/>	Immediate Payment Indicator:	<input type="checkbox"/>
* Invoice Date:	<input type="text"/>	* Vendor Invoice Amount:	<input type="text"/>	Extract Date:	<input type="text"/>
Payment Attachment Indicator?:	<input type="checkbox"/>	Invoice Type:	<input type="text"/>	Bank Code:	<input type="text"/>
Processed Date:	<input type="text"/>	Vendor Foreign Invoice Amount:	<input type="text"/>	Exchange Rate:	<input type="text"/>
Invoice Sub-Type:	<input type="text"/>				
* Payment Method:	<input type="text"/>				
Currency Type:	US Dollar				

▼ Process Items

Purchase Order: Q ←



Paying

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[Distribution of Income and Expense](#)
[Donor Annual Stewardship Report](#)
[Donor Encumbered Report](#)
[General Error Correction](#)
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[General Ledger Entry](#)
[Pre-Encumbrance](#)
[Year End Budget Adjustment](#)
[Year End Distribution of Income and Expense](#)
[Year End General Error Correction](#)

Available Balances Lookup 

* Fiscal Year:	<input type="text" value="2015"/> 
* Chart Code:	<input type="text" value="LU"/> 
* Account Number:	<input type="text" value="BHIS"/> 
Sub-Account Number:	<input type="text"/> 
Object Code:	<input type="text" value="PRAP"/> 
Sub-Object Code:	<input type="text"/> 
Consolidation Option:	<input checked="" type="radio"/> Consolidation <input type="radio"/> Detail <input type="radio"/> Exclude Sub-Accounts
Include Pending Ledger Entry:	<input checked="" type="radio"/> No <input type="radio"/> Approved <input type="radio"/> All
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

1 item retrieved.

<u>Fiscal Year</u>	<u>Chart Code</u>	<u>Account Number</u>	<u>Sub-Account Number</u>	<u>Object Code</u>	<u>Sub-Object Code</u>	<u>Budget Amount</u>	<u>Actuals Amount</u>	<u>Encumbrance Amount</u>
5	LU	BHIS	*ALL*	PRAP	*ALL*	0.00	441.46	(441.46)

Sort options: [CSV](#) | [spreadsheet](#) | [XML](#)



<u>iscal Year</u>	<u>Chart Code</u>	<u>Account Number</u>	<u>Sub-Account Number</u>	<u>Object Code</u>	<u>Sub-Object Code</u>	<u>Balance Type Code</u>	<u>Object Type</u>
5	LU	BHIS	*ALL*	PRAP	*ALL*	AC	*ALL*

July	<u>0.00</u>	October	<u>0.00</u>
August	<u>186.35</u>	November	<u>0.00</u>
September	<u>255.11</u>	December	<u>0.00</u>

Order Import	Item Status	ONORDER
Order Import	Funding Source	INST
Order Import	Cost Source	VEN
Order Import	Method Of PO Transmission	NO PRINT
Order Import	Delivery Campus Code	LU
Order Import	Org Code	LIB
Order Import	Default Location	LEHIGH/LIND/L-ORDER
Order Import	Object Code	PRAP
Order Import	Chart Code	LU
Order Import	Building Code	LIN
Order Import	Item Chart Code	LU

Show 10 entries

Actions	Batch Process Profile Id	Batch Profile Name	Batch Process Type
edit	1	Test_Location_Import	Location Import
edit	10	Test_Batch_Export_Filter1	Batch Export
edit	19	Test_Desc_Batch_Claim_Report_Gen	Claim Report
edit	2	Test_Patron_Import	Patron Import
edit	20	Test_Serial_Record_Import	Serial Record Import
edit	21	Test_Bib_Import_datamapping	Bib Import
edit	22	7093-03_US_FACULTY_EOCR	Order Record Import
edit	23	7093-09_US_AP_ORDERS_EOCR	Order Record Import
edit	24	7093-10_US_FIRM_ORDERS_EOCR	Order Record Import
edit	25	7093-11_US_AP_EOCR	Order Record Import

Showing 1 to 10 of 62 entries



Data mapping for Batch profile

980 \$q			Order Import	Quantity		
980 \$p			Order Import	No Of Parts		
980 \$m			Order Import	List Price		
980 \$b			Order Import	Account Number		
980 \$a			Order Import	Vendor Number		



LEHIGH/FM/FM-3-
NORTH-324.7 M992b-
1-39151010029722

Created By : On: 2014-09-23 12:43:52.0 Updated By : mlb8 On: 2014-09-25 10:59:31.0

Staff Only: Local Identifier: 1062391

▼ Holdings Location/Call Number Information

Location:

Type * for all locations, other letters for matching locations

LEHIGH/FM/FM-3-NORTH

Prefix:	<input type="text"/>	Call Number:	<input type="text" value="324.7 M992b"/>
Shelving Order:	<input type="text" value="324.70000000 M992 b"/>	Call Number Type:	<input type="text" value="Dewey Decimal Classification (D)"/>

▼ Items Location/Call Number Information

Location:

Type * for all locations, other letters for matching locations


LEHIGH/FM/FM-3-NORTH

Prefix:	<input type="text"/>	Call Number:	<input type="text" value="324.7 M992b"/>	<input type="button" value="Browse"/>
Shelving Order:	<input type="text" value="324.70000000 M992 b 000001"/>	Call Number Type:	<input type="text" value="Dewey Decimal Classification (D)"/>	

▼ Item Information

Item Id:	<input type="text" value="wio-1062391"/>	Enumeration:	<input type="text"/>
Barcode:	<input type="text" value="39151010029722"/>	Chronology:	<input type="text"/>
Barcode ARSL:	<input type="text"/>	Copy Number:	<input type="text" value="1"/>
Former Identifiers:	<input type="text"/>	Access Info (URI):	<input type="text"/> Test Link
Statistical Searching Codes:	<input type="text"/>	*Item Type:	<input type="text" value="BOOK"/>
Temp Item Type:	<input type="text"/>	Number Of Pieces:	<input type="text"/>

▼ Acquisition Information

PO Number:	<input type="text" value="5050"/>	
Vendor Line Item ID:	<input type="text"/>	
Fund:	<input type="text"/>	
Price:	<input type="text" value="29"/>	

action list

doc search

search workbench

Logged in User: slw0

Ordering

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Fund

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[Distribution of Income and Ex](#)
[Donor Annual Stewardship Re](#)
[Donor Encumbered Report](#)
[General Error Correction](#)
[General Ledger Correction Pr](#)
[General Ledger Entry](#)
[Pre-Encumbrance](#)
[Year End Budget Adjustment](#)
[Year End Distribution of Inco](#)
[Year End General Error Corre](#)

Serial Receiving Transaction

Document number:	J456	Document Status:	SAVED
Initiator:	ole-quickstart	Created:	02:45 PM 07/31/2014
Serials Receiving Record #:	BUS HIS REV	* indicates required field	

Serial Receiving record

Title:	Business history review.	ISSN:	0007-6805
Author:		Publisher:	[Boston]Harvard Graduate School of Business Administration.
PO ID:	<input type="text"/> <input type="button" value="Reink"/>	Bib Record ID:	5288
Vendor Alias Name:	<input type="text"/> <input type="button" value="Select Vendor"/>	Vendor Name(* for claim):	<input type="text"/>
Instance Record:	who-5209 <input type="button" value="Reink"/>	Call Number:	Current periodical
Bound Location:	LEHIGH/FM/FM-2-SOUTH	UnBound Location:	LEHIGH/FM/FM-2-SOUTH <input type="button" value="Q"/>
* Subscription Status:	Currently received <input type="button" value="v"/>	Serials Receipt Work Unit:	LEHIGH <input type="text"/>
Print Label:	<input checked="" type="checkbox"/>	Public Display:	<input checked="" type="checkbox"/>
Claim:	<input type="checkbox"/>	Create Item:	<input type="checkbox"/>
Copy Number:		Urgent Note:	<input type="text"/> <input type="button" value="edit"/>
General Receiving Note:	Publication cycle definition: 3:M24:D1, Category 1: PER-VENDOR, Category 2: <input type="button" value="edit"/>	Treatment Instruction Note:	DO NOT BIND-JSTOR, <input type="button" value="edit"/>
* Receiving Record Type:	Main <input type="button" value="v"/>	Claim Information:	<input type="text"/> <input type="button" value="edit"/>

Receive Enum/Chron Captions

Action Interval(* for claim):	<input type="text" value="45"/>	Action Date(* for claim):	<input type="text" value="10/04/2014"/> <input type="button" value="calendar"/>
-------------------------------	---------------------------------	---------------------------	---

Enumeration						Chronology													
L1	V.	L2	NO.	L3		L4		L5		L6		L1	[DATE]	L2		L3		L4	
<input type="text" value="88"/>	<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="SUM 2014"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



Title / Author: [Business history review. /](#)

Collapse Navigation <<

Holdings

+ x

EHIGH/FM/FM-2-SOUTH-
current periodical

LEHIGH/FM/FM-2-
SOUTH-Current
periodical-1-5288-1001

LEHIGH/E-RESOURCES
/ELECTRONIC-Electronic
journal

LEHIGH/E-RESOURCES
/ELECTRONIC-Electronic
journal

Created By : BulkIngest-User On: 2014-07-30 00:00:00.0 Updated By : BulkIngest-User On: 2014-07-30 00:00:00.0

Staff Only: Local Identifier: 5209

▼ Location Information

Location:

Type * for all locations, other letters for matching locations

LEHIGH/FM/FM-2-SOUTH

▼ Call Number Information

Prefix:	<input type="text"/>	Call Number:	<input type="text" value="Current periodical"/>	<input type="button" value="Browse"/>
Shelving Order:	<input type="text" value="Current periodical"/>	Call Number Type:	<input type="text" value="Other Schema"/>	<input type="button" value="▼"/>
Copy Number:	<input type="text"/>			

▼ Extent Of Ownership

Type:	<input type="text" value="public"/>	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
Extent of Ownership:			



▼ Receipts from Serials Receiving

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

Main Receipt History

Public Display	Enumeration	Chronology
true	V.88:NO.2	SUM 2014

Show Serials Receiving Record

OLE Localization Issues

International Partners



Kirjastoverkkopäivät – National Library Days – Helsinki, Finland
October 22, 2014

#kualiola | @kualiola



SOAS Library Management System

OLE version 1.5.3



Localization -patron bill

The screenshot shows a web browser window with the URL `william.lis.soas.ac.uk:8080/olefs/portal.do?channelTitle=Patron%20Bill&channelUrl=http://william.lis.soas.ac.uk:8080/olefs/ole-kr-krad/lookup?methodToCall=start&dataObjectClassName=`. The page title is "Patron Bill Lookup".

At the top, there is a status bar: "1 Lookup Results: 1 message".

Below this is a search form with three input fields: "Patron ID:", "First Name:", and "Last Name:". There are "Search", "Clear Values", and "Cancel" buttons below the form.

Below the search form, a message states: "12 Items retrieved, displaying all items." There is a "Show 10 entries" dropdown and "csv", "xml", "xls" buttons.

The main content is a table with the following data:

Actions	Bill No	Bill date	Patron ID	First Name	Last Name	Total Amount	Text Note
edit copy delete	1	11/10/2014	10019	James	Noonan	£5.00	
edit copy delete	10	15/10/2014	p10044395	Beth	Clark	£85.00	
edit copy delete	8	13/10/2014	p11470677	123James A O	WELLS	£2.00	
edit copy delete	9	13/10/2014	p11470677	123James A O	WELLS	£1.75	
edit copy delete	11	15/10/2014	p11492545	Emma S	Wilson	£85.00	
edit copy delete	12	15/10/2014	p11492545	Emma S	Wilson	£85.00	
edit copy delete	2	12/10/2014	p10667490	Helen	PORTER	£60.00	
edit copy delete	3	12/10/2014	p10667490	Helen	PORTER	£60.00	
edit copy delete	4	12/10/2014	p10667490	Helen	PORTER	£60.00	
edit copy delete	5	12/10/2014	p11371791	Victoria	Bird	£60.00	

At the bottom of the table, it says "Showing 1 to 10 of 12 entries". There are navigation buttons: "First", "Previous", "1", "2", "Next", "Last".

At the very bottom of the page, there is a footer: "Copyright 2005-2013 The Kuali Foundation. All rights reserved. Portions of Kuali are copyrighted by other parties as described in the Acknowledgments screen." There is also a Kuali logo.



Localization - patron details

Home > Patron (p10044395)

Patron

Expand All Collapse All

Overview

Patron Id:	p10044395	Barcode:	0180127890	Patron Type:	Full Member	Patron PhotoGraph:
Activation Date:	16/09/1999	Expiration Date:	31/12/2025	Source:		
Active:	true					

Contacts

Name

Name Type: First Name: Beth Last Name: Clark Student ID: TestStudentId102 PCODE1: PCODE2: PCODE3: Not Used Default: true Active: true

Address

Show 10 entries csv xml xls

Address Type	Line 1	Line 2	Line 3	City	State	Postal Code	Country	Address Source	Address Verified	Address Valid from	Address Valid To	Default	active
LOCAL	Willow House	139 Victorian Heights		London		W3 5GB	GB	Registrar Load	true			true	true

Showing 1 to 1 of 1 entries First Previous 1 Next Last

Phone

Show 10 entries csv xml xls

Phone Type	Phone Number	Extension Number	Country	Default	Active
HM	+4474123412345			true	true

Showing 1 to 1 of 1 entries First Previous 1 Next Last



Localization - patron details

The screenshot shows a web browser window displaying a library patron details page. A modal window is open, showing an email list and a table of loaned records.

Email List:

Email Type	Email	Default	Active
HM	bc3@soas.ac.uk	true	true

Showing 1 to 1 of 1 entries

Patron Details:

- Affiliation**
- Library Policies**
General Block: false General Block Notes: Delivery Privilege: false Paging Privilege: false Courtesy Notice: false
- Loaned Records**
Show 10 entries

Barcode	Title	Author	Location	Call Number	Copy Number	Volume Number	Item Status	Item Type	Due Date	Claims Returned Flag	Claims Returned Note	Missing Piece Flag	Missing Piece Note	Item Damage Flag
1800508679	Economic development, growth and welfare.	Smith, C. (Charles)	MAIN		1		BILLED	Long Loan	10/10/2014 11:59 PM	false		false		false
1800544030	Development and underdevelopment in historical perspective : populism, nationalism and industrialization / Gavin Kitching.	Kitching, G. N. (Gavin N.), 1947-	MAIN	A338.9/685727	1		LOANED	One Week Loan	11/10/2014 11:59 PM	false		false		false
1804013798	Development ethics : a guide to theory and practice.	Goulet, Denis.	MAIN	A174/826508	1		LOANED	Reference Only	09/10/2014 11:59 PM	false		false		false

Showing 1 to 3 of 3 entries

Requested Records



BIB details- search workbench

The screenshot displays a web browser window with the URL <http://william.lis.soas.ac.uk:8080/olefs/portal.do?channelTitle=Search%20Workbench&channelUrl=http://william.lis.soas.ac.uk:8080/olefs/ole-kr-krad/olesearchcontroller?viewId=OLESearch>. The page title is "Search Workbench".

Search Workbench

Document Type: Select Records By:

Search Conditions

Note -
Search conditions are applied in the order they appear. e.g. ((Condition 1 and Condition 2) or Condition 3) and Condition 4).
The following special characters @, #, \$, %, -, /, (,), {, }, <, >, *, ~, \, ^, are ignored in search text.

Search For: All of these AND OR NOT

Search Results

Show entries

Title	Author	Publisher	Pub Date
<input type="checkbox"/> Anlat İstanbul		[İstanbul] : TMC,	2005.
<input type="checkbox"/> Benim adım kırmızı /	Pamuk, Orhan.	İstanbul : İletişim,	2004.
<input type="checkbox"/> Beyaz kale.	Pamuk, Orhan.	İstanbul : İletişim Yayıncılık,	1996.
<input type="checkbox"/> Beyaz kale.	Pamuk, Orhan.	İstanbul : Can Yayınları,	1985.
<input type="checkbox"/> black book /	Pamuk, Orhan.	London : Faber and Faber,	1994.
<input type="checkbox"/> Cevdet Bey ve oğulları.	Pamuk, Orhan.	İstanbul : Can Yayınları,	1992.
<input type="checkbox"/> Cevdet Bey ve oğulları	Pamuk, Orhan.	[İstanbul] : Karacan Yayınları,	1982.
<input type="checkbox"/> Devlet İstatistik Enstitüsünde 50 yıl 1926-1976.	Turkey. Devlet İstatistik Enstitüsü.	Ankara : Devlet İstatistik Enstitüsü Matbaası,	1976.
<input type="checkbox"/> history of Middle East economies in the twentieth century	Owen, Roger, 1935-	Cambridge, Mass : Harvard University Press,	1999.
<input type="checkbox"/> history of Middle East economies in the twentieth century /	Owen, Roger.	London : I. B. Tauris,	1998.

Showing 1 to 10 of 40 entries

Narrow Search

Author

- [Pamuk, Orhan. \(24\)](#)
- [Pamuk, Şevket. \(12\)](#)
- [Freely, Maureen, 1952-. \(4\)](#)
- [Ebrary Sub. \(2\)](#)
- [Gökнар, Erdağ M. \(2\)](#)

Format

- [Book \(38\)](#)
- [Other \(1\)](#)
- [Video \(1\)](#)

Genre

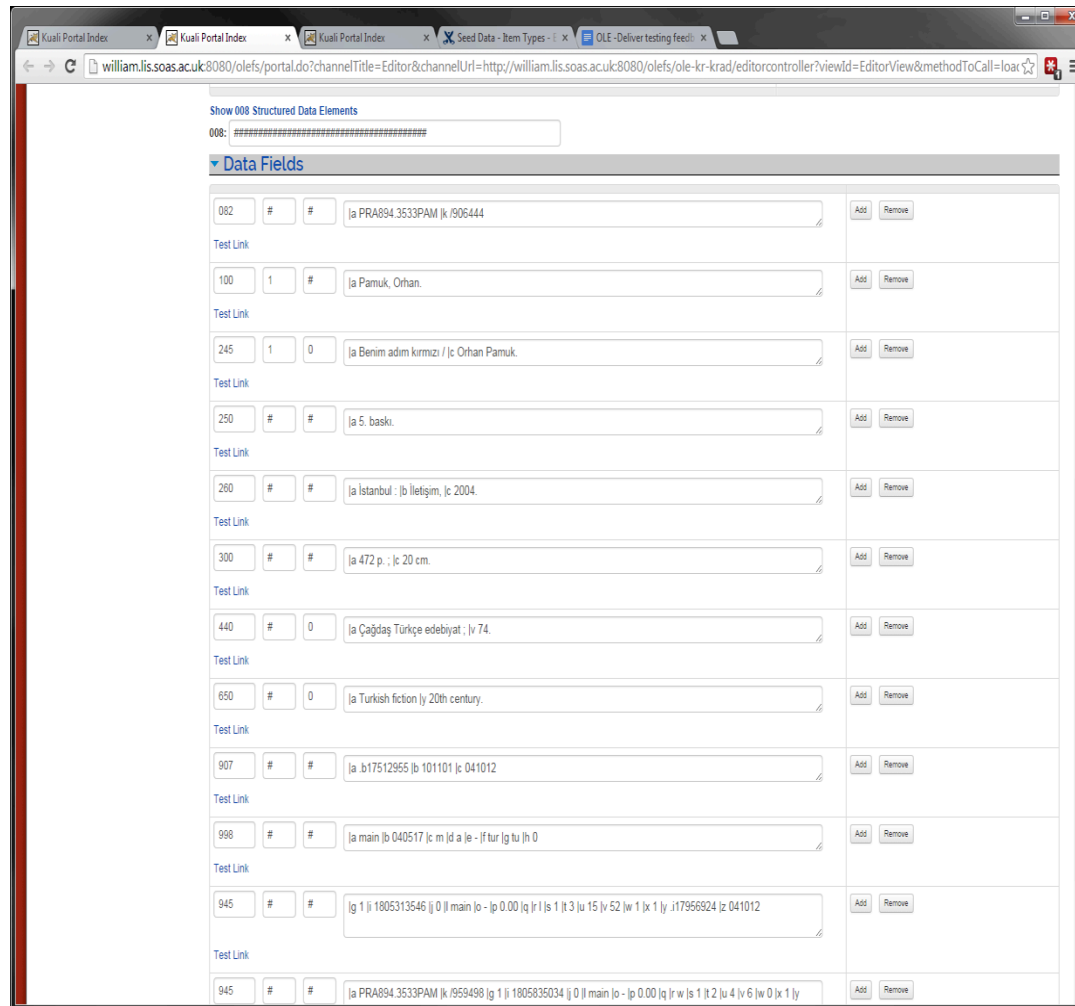
- [Electronic books. \(2\)](#)

Language

- [English \(19\)](#)
- [Turkish \(15\)](#)
- [Undefined \(6\)](#)
- [English translation of: Benim adım kırmızı. \(2\)](#)



MARC fields- transliterated



The screenshot displays a web interface for editing MARC data. The browser address bar shows the URL: `william.lis.soas.ac.uk:8080/olefs/portal.do?channelTitle=Editor&channelUrl=http://william.lis.soas.ac.uk:8080/olefs/ole-kr-krad/editorcontroller?viewId=EditorView&methodToCall=load`. The page title is "Show 008 Structured Data Elements". Below this, there is a text input field containing "008: #####". A section titled "Data Fields" contains a table of MARC fields. Each row includes a field number, a subfield indicator, a data type indicator, the field value, and "Add" and "Remove" buttons. A "Test Link" is provided for each row.

Field Number	Subfield Indicator	Data Type Indicator	Field Value	Buttons
082	#	#	ja PRA894.3533PAM (k.1906444	Add Remove
100	1	#	ja Pamuk, Orhan.	Add Remove
245	1	0	ja Benim adım kırmızı / jç Orhan Pamuk.	Add Remove
250	#	#	ja 5. baskı.	Add Remove
260	#	#	ja İstanbul : jö İletişim, jç 2004.	Add Remove
300	#	#	ja 472 p. ; jç 20 cm.	Add Remove
440	#	0	ja Çağdaş Türkçe edebiyat ; jv 74.	Add Remove
650	#	0	ja Turkish fiction 19th century.	Add Remove
907	#	#	ja .b17512955 jç 101101 jç 041012	Add Remove
998	#	#	ja main jç 040517 jç m jç a jç e - jç tur jç tu jç h 0	Add Remove
945	#	#	jç 1 jç 1805313546 jç 0 jç main jç o - jç 0.00 jç jç r jç s 1 jç 3 jç 15 jç 52 jç 1 jç 1 jç 1 jç 17956924 jç 041012	Add Remove
945	#	#	ja PRA894.3533PAM (k.1959498 jç 1 jç 1805835034 jç 0 jç main jç o - jç 0.00 jç jç r jç w jç s 1 jç 2 jç 4 jç 6 jç 0 jç 1 jç 1 y	Add Remove



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 Quali 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 Quali OLE.



OLE Local Option

- Using local resources an institution will implement Quali OLE on local or private cloud infrastructure and would rely on the Quali OLE community for support and enhancement.



OLE Hybrid Option

- Select your competencies for local migration and implementation and out-source 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 Coeus 5.0 The "FE" Release

June 2012

Kuali Coeus 5.0 The "FE" Release

June 2012

Kuali 2.0

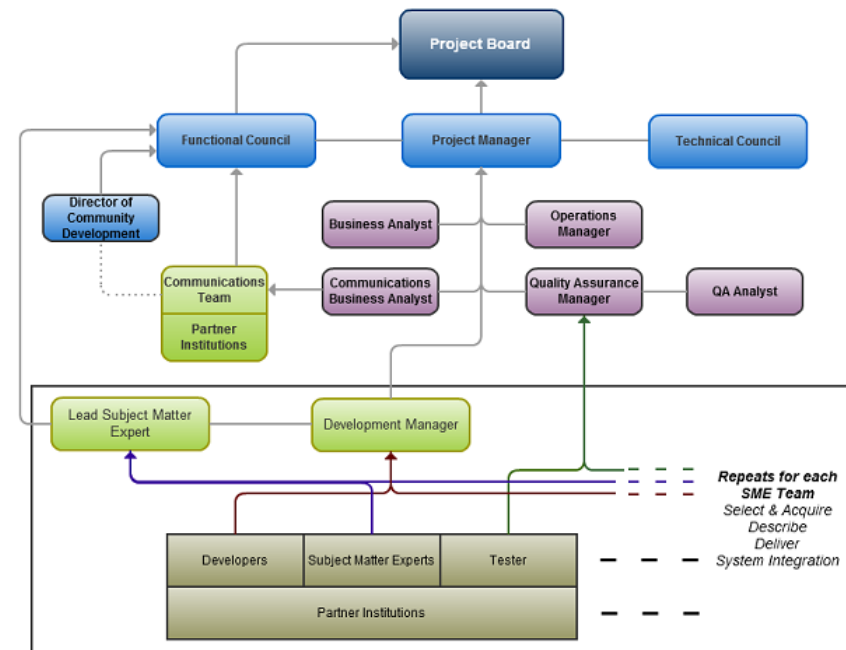


- Inside HigherEd: Kuali Foundation Launches Commercial Service Partner
<https://www.insidehighered.com/news/2014/08/25/kuali-foundation-launches-commercial-service-provider>
- JISC OSS Watch: Unpicking Kuali AGPL Strategy:
<http://osswatch.jiscinvolve.org/wp/2014/09/10/locked-into-free-software-unpicking-kualis-agpl-strategy/>



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

	Year Five (2015)			Year Six (2016)			Year Seven (2017)			Year Eight (2018)		
Growth	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High
Income	\$925,000	\$1,012,500	\$1,100,000	\$925,000	\$1,100,000	\$1,275,000	\$925,000	\$1,187,500	\$1,450,000	\$925,000	\$1,275,000	\$1,625,000
Core staff	\$716,239	\$716,239	\$716,239	\$737,726	\$737,726	\$737,726	\$759,858	\$759,858	\$759,858	\$782,654	\$782,654	\$782,654
Marketing	\$18,500	\$20,250	\$22,000	\$18,500	\$22,000	\$25,500	\$18,500	\$23,750	\$29,000	\$18,500	\$25,500	\$32,500
Development	\$190,261	\$276,011	\$361,761	\$168,774	\$340,274	\$511,774	\$146,642	\$403,892	\$661,142	\$123,846	\$466,846	\$809,846
Total	\$925,000	\$1,012,500	\$1,100,000	\$925,000	\$1,100,000	\$1,275,000	\$925,000	\$1,187,500	\$1,450,000	\$925,000	\$1,275,000	\$1,625,000



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](https://twitter.com/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](https://twitter.com/mcdonald) | [@kualiole](https://twitter.com/kualiole)

