



**THE OPEN LIBRARY ENVIRONMENT
PROJECT:**

**BUILDING AN ILS FOR SERVICE ORIENTED
ARCHITECTURE INTEGRATION**

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What is OLE?

- OLE = Open Library Environment
- A sustainable academic library management system to replace commercial applications
- Better interoperability and integration with:
 - Campus identity management systems
 - Campus HR and Student systems
 - Campus financial & purchasing systems
 - Course management & content repository systems



How did OLE get started?

- Planning phase: September '08 – July '09
- International participation from libraries and consortia
- Gathered input from Library Staff around the world
- Published a conceptual “design” document in July '09 proposing a plan to build a new system



Partnerships

- 8 U.S. founding library partners
- Received a Mellon matching grant, 2.4M to build system
- Kualu Foundation



Kuali Systems/Products

- Kuali Financial System
(KFS) <http://www.kuali.org/kfs>
- Kuali Coeus—Administration/Compliance
(KC) <http://www.kuali.org/kc>
- Kuali Student –Student Administration
(KS) <http://student.kuali.org/>
- Kuali Rice –Infrastructure /Programming
<http://kuali.org/rice/>
- Kuali OLE -Open Library Environment
(OLE) <http://www.kuali.org/ole>

Structure

The technology behind **OLE** is called service-oriented architecture (**SOA**), which will create an adaptable environment for the user, facilitate local workflows, as well as options for integration with third-party systems--integrating business processes across systems



U.S. Members

- Indiana University (lead)
- Lehigh University
- Duke and NCSU
- University of Chicago
- University of Maryland
- University of Pennsylvania
- Florida Consortium (9 consortium partners)
- University of Michigan (funding only)



Florida Consortium Partners

- University of Florida (lead)
- Florida International University
- Florida State University
- New College of Florida
- Rollins College
- University of Central Florida
- University of Miami
- University of South Florida
- Florida Center for Library Automation



Governance

- Board of Directors – Policy Issues
- Functional Council – Functional Specs
– Subject Matter Experts – Details
- Technical Council – Technical Architecture



6 Essential Components

- **Select**
- **Acquire**
- Describe
- Deliver
- Manage
- Manage Entity Relationship

Subject Matter Expert Teams

- User Stories – Angie Ohler
- Data Modeling
 - Yalan Qi, Kathy Glennan, Dave Wilt
- Workflow & Implementation
 - Gordana Ruth, Beth Guay
- Communications – Eric Bartheld
- Financial Gap Analysis



User Stories Team

- Gathering requirements for software development/design
- Simple statements reflect outcomes & actions
- Sample: A student wants the library to purchase an e-book. He goes to the library's web page and clicks on, "Buy Now" to identify the item.
- 1200 stories submitted for "Acquire"



Data Modeling Team

- Develop a first-draft schema (conceptual model) for managed data in Kuali OLE
- ID Standards used by partners for acquisitions, licensing, and bibliographic data
- Indicate where there are no standards

Workflows & Implementation

- Inventory enterprise level systems at each university, e.g. PeopleSoft, Banner, FRS
- Inventory external vendor systems, e.g. GOBI, WorldCat Local
- Review the core entities that make up the “functional set” of services, e.g. Acquisitions, Circulation
- Lead testing



Communications Team

- Developing new Kualu OLE website
- Create an OLE Factsheet draft
- Roadmap with timeline and deliverables
- Email/listserv development
- Kualu Insider newsletter/PR packets
- Events Calendar
- Collecting presentation materials for use



Time Line and Core Staff

- Project extends from July 1, 2010-June 30, 2012
- First deliverables by June 2011
- Executive Director – Robert McDonald
- Functional Council Chair -- Michael Winkler
- Project Manager – Brad Skiles
- Data Architect – to be hired Fall 2010
- Business Analyst – to be hired Fall 2010



Maryland Contacts

- Patricia A. Steele, OLE Board
- Carlen Ruschoff, Functional Council
- John Robinette (OIT), Technical Council
- Ben Wallberg, Technical Council

And...

- *University of Maryland Working Group:*
Libraries, OIT, School of Engineering



Questions

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