



Kuali OLE in Germany

Evaluation Project of
hbz, Cologne and VZG, Göttingen

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Introduction



hbz and VZG - Introduction

- ❖ hbz = Hochschulbibliothekszentrum des Landes Nordrhein-Westfalen / Library Service Centre of North Rhine-Westphalia
 - ❖ Situated in Cologne, North Rhine-Westphalia
 - ❖ Staff: ca. 85 FTEs
- ❖ VZG = Verbundzentrale des Gemeinsamen Bibliotheksverbunds (GBV) / Head office of the Common Library Network
 - ❖ Situated in Göttingen, Lower Saxony
 - ❖ Staff: ca. 71 FTEs

hbz and VZG - Introduction

- ❖ Two of six regional library service centres in Germany
- ❖ Hosts for regional union catalogues (collaborative cataloguing)
- ❖ Located in a heterogeneous software environment for its customers (libraries), data providers and data receivers
- ❖ Provide ILS (SaaS), ILL, portals and other services



hbz and VZG - Introduction

GBV | VZG

union catalogue ...

- ❖ 72 academic libraries, 400 research libraries
- ❖ 37 m bibliographic and 89 m holding records
- ❖ 122,000 e-journals
- ❖ 2,100,000 online resources (e-books, articles)
- ❖ using OCLC CBS since 1993

ILS: OCLC LBS



union catalogue ...

- ❖ 55 academic library systems with more than 1,000 different libraries
- ❖ 19 m bibliographic and 42 m holding records
- ❖ 120,000 e-journals
- ❖ 700,000 online resources (full text, e-books etc.)
- ❖ using Aleph / ExLibris

ILS: various, e.g. Ex Libris Aleph, OCLC Sunrise, LIB-IT Libero

The OLE Project



Initial Position and Motivation

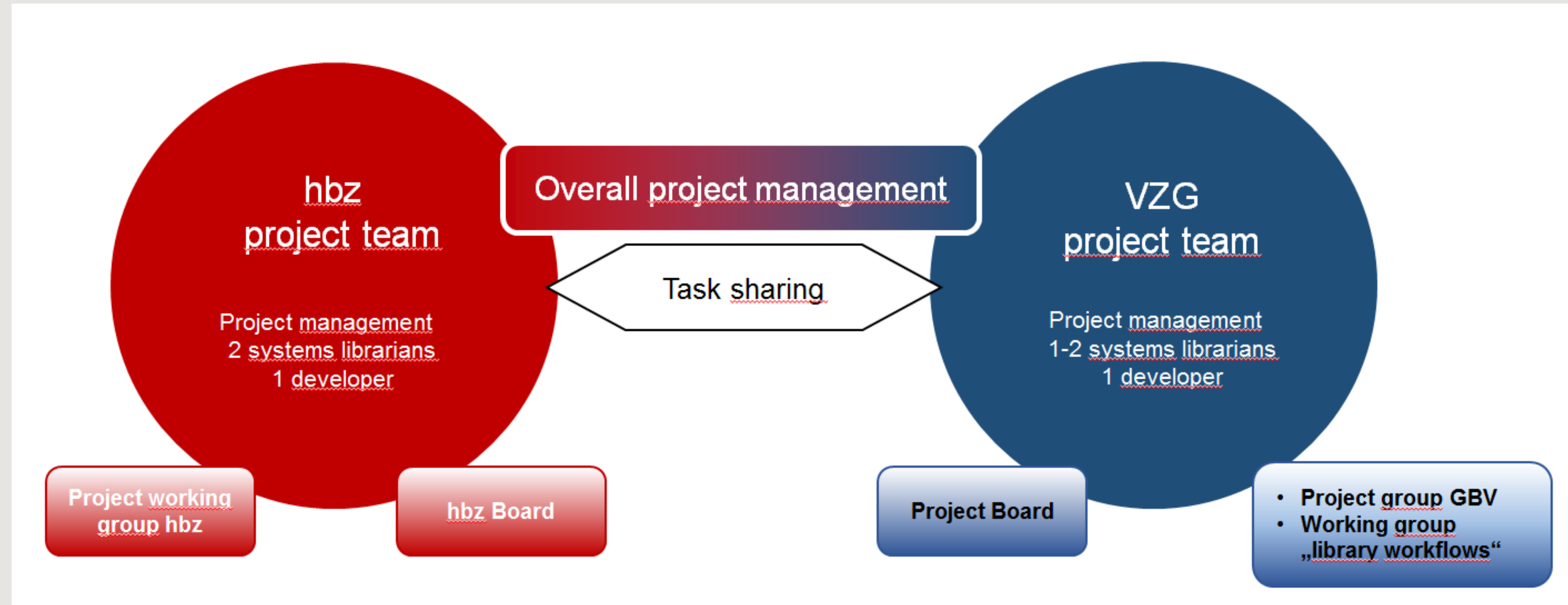
- ❖ Today's library management systems (LMS) are at the end of their life cycle
 - ❖ Replacement concept needed
- ❖ Workshop „The Future of Integrated Library Systems“, Göttingen 2012
- ❖ Market analysis as task for the library network headquarters hbz and VZG
 - ❖ Focus: software for academic libraries
 - ❖ Consider Open Source Systems beside commercial systems (Alma, WMS)

 **Evaluation of Kuali OLE**

Goals

- ❖ Qualified statements about functional and technical suitability of OLE for German academic libraries
- ❖ Requirements catalogue for evaluation of new generation LMS
- ❖ Building up independent knowledge about new generation LMS
- ❖ Reuse tools and experiences for the evaluation of other LMS than OLE

Project Organization



Staff Unit Library Management Systems

Dept. Local Library Systems

Cooperation hbz and VZG

- ❖ Shared evaluation
 - ❖ Very complex task (knowhow, implementation, configuration)
 - ❖ Integration in different technical and organizational infrastructures
- ❖ Shared project organization
 - ❖ Cooperative scheduling and task management
 - ❖ Tools (project Wiki, JIRA, mailing lists etc.)
 - ❖ Workshops, webinars and F2F meetings

Financials

- ❖ Project hbz
 - ❖ Resources of hbz
 - ❖ Project funding: Ministry of Innovation, Higher Education and Research of North Rhine-Westphalia
- ❖ Project VZG
 - ❖ Resources of VZG
 - ❖ Project funding by GBV libraries (voluntary)

Milestones



Milestone 1 - Infrastructure

- ❖ Installation of a cross-network project infrastructure
- ❖ Implementation of three test machines each in hbz and VZG
 - ❖ <http://ole.gbv.de/>
 - ❖ <http://kuali.hbz-nrw.de/>
- ❖ Building up functional and system administrative knowledge
 - ❖ Joint configuration workshop with HTC in May 2014
 - ❖ Translation of manuals and documentations
- ❖ Project website: <http://www.ole-germany.org>

Milestone 2 - Test Installation

- ❖ Data conversion, data import
 - ❖ UB Hildesheim (VZG), UB Wuppertal (hbz)
 - ❖ Dummy user data
 - ❖ Title, holding and item data (one million titles each library)
- ❖ Configuration of circulation and acquisition
 - ❖ e.g. locations, user rights, circulation regulations, budget structure

Milestone 3 - E-Resources

- ❖ Knowledge build-up: Global Open Knowledgebase (GOKb) / KB+
- ❖ Webinars and test accounts: GOKb and KB+
- ❖ GBV tests in the context of the German ERMS Project (DFG)
- ❖ Test installations of KB+ with GOKb integration at VZG in cooperation with State and University Library Bremen



Milestone 4 - Discovery

- ❖ Integration of OLE with DigiBib and VuFind
- ❖ Search & display title data
- ❖ Display item data including availability
- ❖ OPAC and account functionality
- ❖ Reservations, orders, renewals, cancellations
- ❖ User account status display



Milestone 5 - Requirements Catalogue

- ❖ Requirements catalogue „Next Generation System“ for academic libraries in Germany
- ❖ Survey of existing requirements catalogues
 - ❖ Recent published catalogues only from Anglo-American region
- ❖ Verbalization and editing of the requirements
 - ❖ Consolidation and translation
 - ❖ Consulting experts
 - ❖ Editorial revision (work in progress)

Milestone 6 - DFG Funding Application

- ❖ DFG (=German Research Foundation) application for funding of hbz/VZG, November 2014 (work still in progress)
- ❖ Preparations for a pilot implementation in Germany
 - ❖ Adjustments to German requirements (e. g. ILL)
 - ❖ Integration in hbz and GBV network workflows (e.g. update mechanisms to union catalogues)
 - ❖ Business model set-up
- ❖ Project duration: four years (3+1)

Milestone 7 - OLE Community

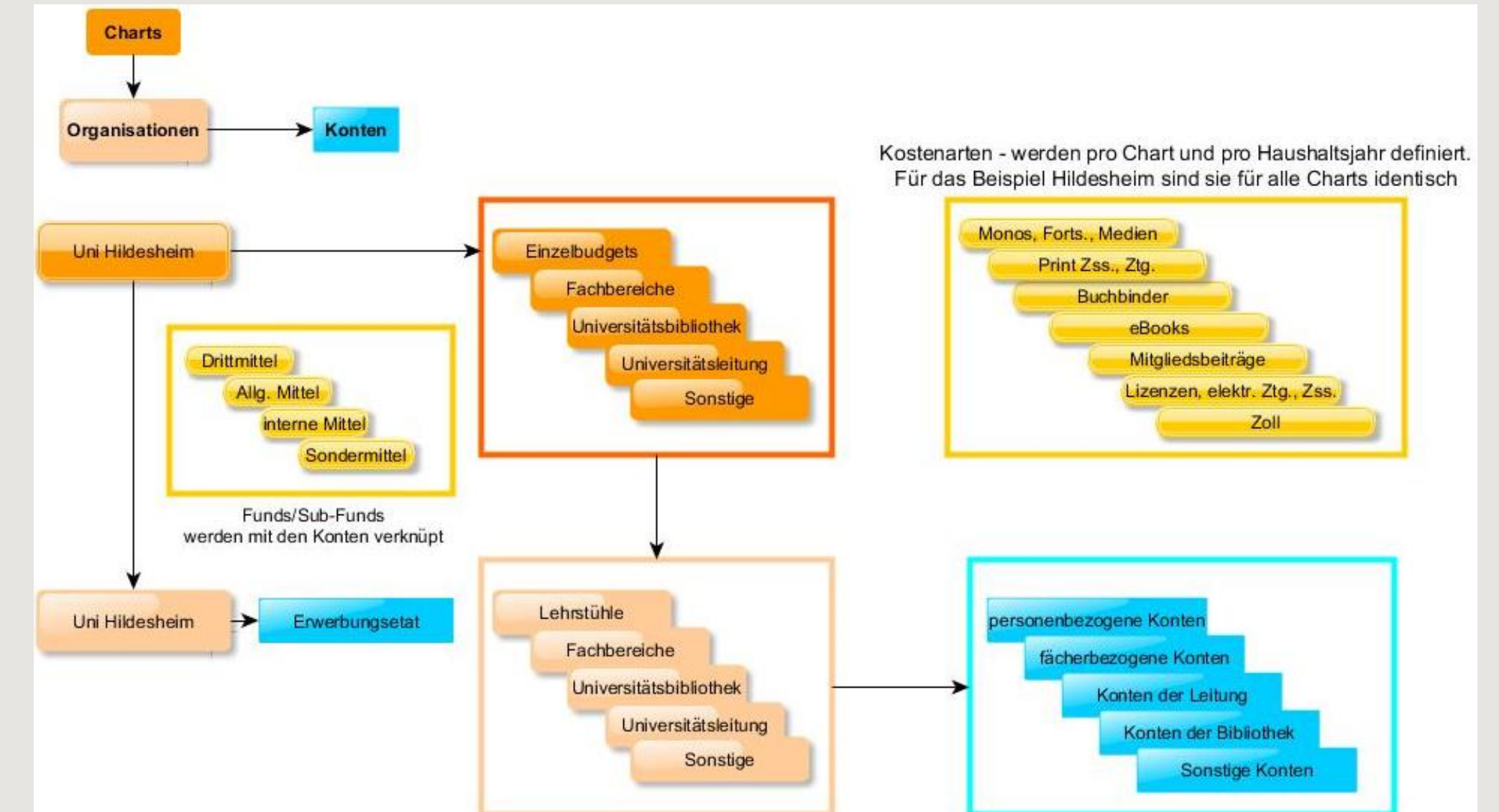
- ❖ Several project meetings with OLE and GOKb project members
 - ❖ GOKb Meeting, London, February 2013
 - ❖ LIBER Conference, Munich, August 2013
 - ❖ UK Quali Days London, November 2013
 - ❖ German Library Days, Bremen, June 2014
 - ❖ Quali Days 2014, Indianapolis, November 2014
 - ❖ LIBER Conference, London, June 2015
- ❖ Participation in OLE Functional Council (non-voting status) since January 2015
- ❖ Cooperation talks OLE and GOKb, London, July 2015
- ❖ OLE project membership, November 2015

Project Results



Project Results - Functionality 1

- ❖ Meta data management
 - ❖ Successful data import and management
 - ❖ MARC21, OLEML (internal)
 - ❖ Authority data missing
- ❖ Acquisition
 - ❖ Extensive functionality
 - ❖ Differentiated budget structure possible
 - ❖ Management of e-resources still missing – high priority



Project Results - Functionality 2

- ❖ Circulation
 - ❖ Functionality mostly complete
 - ❖ Operation of self-service machines possible
- ❖ Roles and rights configuration needs to be simplified
- ❖ Ergonomics needs to be improved

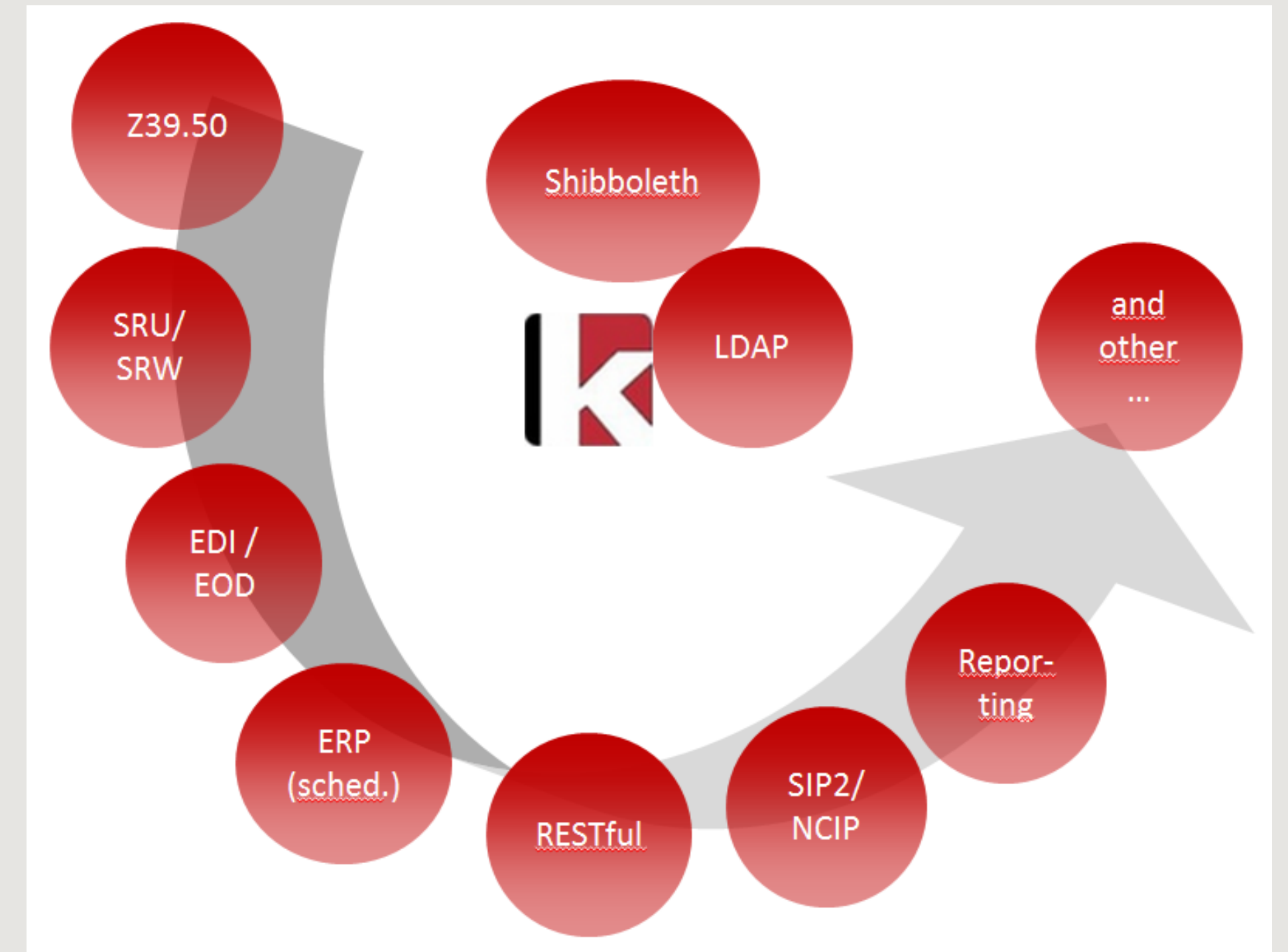
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		Handapparat	Studierende	Universitätsangehörige	Professoren	Universitätsangehörige HAWK	Externe
BUA	Buch ausleihbar	FixedDueDate= 30.09.2015 CP 2	30/6x30 CP 1	30/6x30 CP 3	30/12x30 CP 4	30/6x30 CP 3	14/6x30 CP 5
AVA	AV ausleihbar						
BUZ	Buch mit Zustimmung ausleihbar						
AVZ	AV mit Zustimmung ausleihbar						
BUP	Buch <u>präsenz</u>	Nicht ausleihbar			7 CP 6	Nicht ausleihbar	
AVP	AV <u>präsenz</u>						
ZSP	Zeitschrift <u>präsenz</u>						
MKP	Mikroform <u>präsenz</u>				Nicht ausleihbar		

Project Results - Technique

- ❖ Scalable, suitable for high loads
- ❖ Open Source enables free choice of cloud provider
 - ❖ Private / community cloud, local installation
- ❖ Open and transparent software development and documentation
- ❖ No clear framework for code contribution
- ❖ Internal development and changes not satisfactory
- ❖ Code quality and documentation needs to be improved

Project Results - APIs

- ❖ Integration of 3rd party systems
 - ❖ Discovery: availability
 - ❖ Circulation: self-check and self-cash machines
 - ❖ Meta data management (except GOKb)
 - ❖ Acquisition: vendor data (orders, invoices) – not tested
 - ❖ Financial system (e.g. of the University) (ERP) – needs to be developed
 - ❖ Statistics
 - ❖ Identity management



Project Results until now

- ❖ Integration of OLE possible
 - ❖ in existing and new German network structures (e.g. Union catalogues, ILL, Journal authority data)
- ❖ Connection with any external data source possible
 - ❖ Pica CBS, Aleph union catalogue, WorldCat, Alma
- ❖ Improvement needed in technical architecture, software quality and documentation
- ❖ Functionality needs to be completed as planned
- ❖ Improvement needed in user interface and ergonomics
- ❖ After adjustment to German requirements and integration into German infrastructure
 - ➔ OLE has potential for German academic libraries

Project Prospect



Project – next steps

- ❖ Development partner with OLE community from January 2016
 - ❖ Participation in committees and working groups
 - ❖ Contribution to code development
- ❖ More testing (functional and technical) of OLE (version 2.0 and following)
 - ❖ Enhancement of the test implementations
 - ❖ Test of GOKb
- ❖ Publishing of the evaluation results and requirements catalogue

Prospect – OLE Live

- ❖ Implementation of OLE in two German pilot libraries
 - ❖ middle-sized university libraries
- ❖ Cost estimate for adaption and enhancements of OLE for German libraries
- ❖ Hosting of OLE in hbz/VZG private cloud
- ❖ Possible options for OLE service
 - ❖ Integration in our existing network data workflows, union catalogues, ILL
 - ❖ Connection of OLE to data sources (e. g. WorldCat, Alma)



Thank you.

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