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

hbz

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
- 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 Kuali Days London, November 2013
  - German Library Days, Bremen, June 2014
  - Kuali Days 2014, Indianapolis, November 2014
- 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
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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