

Kuali Open Library Environment, Release 1.0, November, 2013

Kuali Open Library Environment (OLE) 1.0 is the first published release available. Currently, OLE includes four core modules: Select and Acquire, Describe and Manage, Deliver, and System Integration. This release does not include functionality necessary for some library operations. Continued efforts for 1.5 include finalizing roles and permission, improved and expanded functionality for OLE's APIs, importing a single MARC record that will create an order, and additional changes mentioned below.

Select and Acquire Module includes:

- An all new Serials Receiving document, created to allow users to receive individual issues, supplements, and indexes. The document also tracks subscriptions and aids in action interval calculations.
- The E-Resource record was coded as the first step in electronic acquisitions. The E-Resource record serves as a hub for users to evaluate electronic resources for purchase and manage their life cycles.
- Changes have been implemented to improve and simplify the ordering processes: calculate and submit are now done with one button, vendor aliases pre-fill fields for users, and users can now link existing bibs to orders.
- The new Invoice document allows users to pay for multiple items from one interface.
- Enhancements to the OLE Receiving Queue also allow users to pay with or without receiving items.
- An overhaul has been done to the process of importing records (aka ingest). From one location users can import and export multiple file types and, using profiles, users can configure the imports and exports to suit their needs.

Describe and Manage Module includes:

- Major changes have been implemented to support structured editing of the leader and control fields on the bibliographic editor.
- A staff only flag has been incorporated to hide records from library discovery layers. The flag may also be used for reporting.
- System parameters have become more flexible to allow implementers the choice of modifying locations from the Item level within an OLE Instance or only from the holdings record.
- System-delivered cataloging roles have been created to describe basic permissions. These are locally configurable.
- OLE has also added batch deletion of bibliographic and OLE Instance records.

Deliver Module includes:

- Modifications in the appearance of the Patron record have been done to increase usability.
- Circulation and in-house use counters are now displayed in the Item records.

- Changes implemented on the Request screen allow users to conveniently search for patrons by barcode.
- An all new calendar e-document has been added to assign service hours to libraries and circulation desks. Calendars will influence loan periods.
- Development also included continued enhancements to roles and permissions for patrons and circulation.

System Integration includes:

- Users are able to export records for transmission to public discovery layers, external utilities or other databases.
- An API has been added so that outside systems, such as InterLibrary Loan or catalog discovery software, may interact with OLE.
- Local, unique identifiers (bib numbers typically in 001) were added to records to make searching easier throughout OLE's interface.
- OLE undertook several large changes to the underlying software and infrastructure. Rice was upgraded to 2.2.5 and upgraded Java to Java 7. Additionally, steps have been made to make OLE a more unified environment. Whereas before OLE was divided into OLE-KFS, OLE-LS (for library documents), and OLE DocStore, the final goal is to be unify all of these. In 1.0, OLE includes OLE-LS and OLE DocStore.
- The DocStore now includes an RDBMS repository for bibliographic records.

Known Bugs and Issues

NOTE: Release 1.0 is not production-ready software but a release for early adopters and the public to begin reviewing its installation process, data conversion requirements and application functionality. There will not be an upgrade path available from a 1.0 to 1.5 release.

Known issues to be addressed in OLE 1.5 include:

Mass data loading – stress testing of the system will be addressed in OLE 1.5. Small data sets have been successfully loaded, but not the millions required by a typical ILS installation.

Memory leak and system slowness – A middleware memory leak results in poor performance requiring a reboot of the application. This issue will be addressed with an upgrade to the middleware application, Rice 2.3

Context sensitive help – Links to context sensitive help are applied inconsistently across the application (notated by a “?”) and fail when executed. This will be addressed in OLE 1.5. User documentation (help) is available in HTML and PDF format.

Additional issues can be found in Jira: <https://jira.kuali.org/browse/OLE>

OLE 1.0 Technical Notes

All technical installation notes for Kuali OLE Release 1.0 can be found on the public documentation site at [OLE 1.0 Installation Documentation](#).

OLE 1.0 User Documentation and Link to Test Drive

See the [OLE Documentation Portal](#) to read through the Overviews and Manuals, and learn more about the 1.0 release.

Test drive OLE from Kuali.org: <http://www.kuali.org/test-drives>.

Glossary

The [OLE Glossary](#) is available through the wiki.

Future Releases

The Kuali Open Library Environment project team is planning another release, OLE 1.5, for the first quarter of 2014. This will be the first implementable release and will include all functionality necessary for library management.

OLE 1.5 will include but is not limited to analytics, global changes to OLE Instances (holdings and item records), clickable URLs within bibliographic records, printing pull call slips, operator warnings and patron blocks at checkout, claiming unfulfilled orders, fiscal year processing, and additional electronic acquisitions work. In addition, OLE will be updating to Rice 2.3, and MySQL 5.6.12, working to enhance Document Store searching, and modifying the user interface to better support libraries' work.

See our timeline (<http://www.kuali.org/ole/timeline>) for a big picture of the 1.5 release, as well as what has been developed in the current and past releases.

OLE Acknowledgments

<https://wiki.kuali.org/display/OLE/Licenses+and+Acknowledgements+for+OLE+1.0>

Contact Us

If you have technical questions, please contact our collaboration community at ole.technical.usergroup@kuali.org.

For functional questions, please contact our collaboration community at ole.functional.usergroup@kuali.org.