

Kuali® OLE Roadmap

Pervasive Themes

Technologies

- Standards orientation
- Service layer architecture
- Kuali® Technologies
- Proven free and open source (FOSS) technologies

Business Process

- Reduced vendor lock-in
- Flexible workflows
- Flexible staffing model
- Enterprise integrations technologies

12/8/2011Draft Version 0.4.11

Version 0.3 Release
November 2011

Features

Select & Acquire

- *Kuali® Financial System v4 Core*
- Extensive library business process analysis
- *Kuali® Rice 1.1* for workflow
 - Supply chain automation
 - Vendor firm order ingest
 - Manual invoice entry
- Enhanced Pre-order Selection
- Purchase discrete item
 - Requisition
 - Purchase Order
 - Encumber funds
 - Receive item

Describe

- *Apache Jackrabbit™* document repository for metadata
- Support multiple descriptive metadata formats
- Define document types – bibliographic, localization, enhancement
- 5 million bibliographic, 5 million item documents loaded

Searching

- Faceted search for descriptive metadata
- Transactional metadata search with linked descriptive metadata

Research

- Partner finance systems
- Partner identity management systems
- Document store relationship linking
- Data dependencies for Deliver policies
- Metadata editor architecture
- Relationship between bibliographic, holding, and item-level records

Implementation of Core Technologies

12/8/2011Draft Version 0.4.12

Version 0.6 Release
March 2012

Features

Select & Acquire

- Ingest order records
- Fund accounting
- Payment with ERP
- Complex PO to invoice relationships

Deliver

- Patron infrastructure
- Design Patron classification

Manage Entity Relationship

- Document linking tools

Describe

- Metadata management
 - Localization & enhancement metadata architecture
- Linked data integration
- Document Store linking
- Ingest & overlay documents from external sources
- Editor infrastructure

Research

Impact on Rice 2.0

- Installation & Training
- Build Data exchange between Rice 1.x and Rice 2.0

OR

Map/Re-factor KFS 4 Core Code to Rice 2.0

- Convert code based on Rice 1.x to Rice 2.0
- License management services
- Rules Engine

Pre-requisites for local Financial integration

Integration with ILL, Reserves, Course Management System

Library Starts Here: Select, Acquire, Describe

12/8/2011
Draft Version 0.4.1
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Version 0.8 Release
August 2012

Features

Deliver

- Design Deliver policies
- Policy Management services (Checkin, Checkout, Hold, Reserve)
- Patron Management services
- Patron information services with enterprise IdM
- Initial integration with ILL, Resource Sharing systems

Select & Acquire

- License Management workflows

Complete Describe

- Metadata Editor web application
- Batch Editing
 - Editor interaction
- Record extraction

Implementation Tools

- Data integration with discovery systems
- Initial data migration tool set (extract, transfer, load)

Research

- Partner ERP integration requirements
- Partner Identity Mgmt integration requirements
- External development and use of API
- Integration with GOKb

Implementation of Deliver and License Management

12/8/2011
Draft Version 0.4.1
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Version 1.0 Release
December 2012

Features

Select & Acquire

- Bi-directional messaging with ERP, supply chain

Deliver

- Patron self services
- Circulation standards (SIP2, NCIP, etc)
- Finish ILL integration

Manage Entity Relationship

- Initial integration of GOKb
- Initial ERM prioritization

Implementation Tools

- Reporting Tools
- Documented API & service registry
- Distribution packaging
- Framework for training development
- Documentation
- Completed migration toolkit
 - Description Data
 - Circulation history
 - Acquisition history
- Complete system ready for implementation (minimum of 6 months expected)
- Exposure of Service Registry

Research

- Partner implementation strategies
- Software distribution management
- External development and use of API
- Electronic serials management with GOKb
- OpenURL integration
- KFS 5 Core upgrade
- GOKb linked data in Orders (Select & Acquire)
- GOKb linked data for electronic resources (Describe, Deliver)
- OpenURL services

Ready for Implementation

12/8/2011
Draft Version 0.4.1
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2013

Partner implementations and migration

Kuali® Financial System v5 Core upgrade

Electronic Resource Management services through GOKb implementation

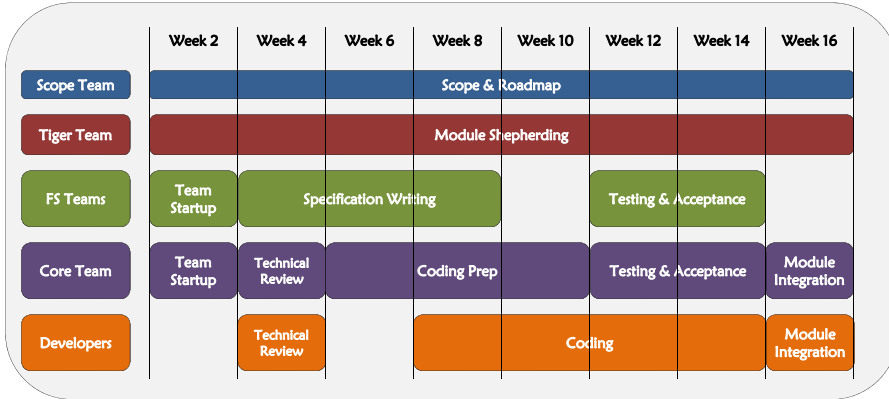
Sustainability through Partnership

Research

- Refined financial workflows
- ERM collection development enhancements
- User services with GOKb

12/8/2011
Draft Version 0.4.1
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Kuali® OLE Quarterly Development Cycle



The development cycle describes the method for generating functional specifications, technical requirements, code. The cycle is a quarter year, or 14 to 18 weeks. The scope tiger team determines the roadmap for the release in consultation with the functional council, core team, and stakeholders. Additionally, the scope team will leverage partner resources to perform basic research into data structures, integrations, & technologies. Deliverables are assigned to our tiger teams that manage the production & acceptance of code. A tiger team may convene & oversee one or more functional specification writing team. These teams, using the User Stories repository, develop specifications for specific functionality. The specification teams are also used to test and recommend acceptance of code returned from the developers. The core team provides the backbone of the process, providing analytical, data model, testing, and technical support and coordination for the teams. The core team takes developed functional specifications & prepares technical requirement documents for the developers. Finally, the developers take these requirements and produce code.

All of this is a highly iterative process, and the boundaries of any given activity are not impermeable. The purpose of this graphic is to illustrate the roles and activities involved in the development cycle. Not illustrated here, is that we may have several Tiger Teams active during any development cycle, resulting in increased velocity for generating specifications.