
Kuali Open Library Environment, 1.5 Release Notes

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Warning

This is a draft.

Kuali Open Library Environment (OLE) 1.5 is the first release that will be implemented by several OLE partners. OLE is delivered with demo and bootstrap data. A switch has been provided that allows an option to load bootstrap, bootstrap and demo, or neither dataset. Data migration plans and best practices continue to be documented, and an additional loader for Serials Receiving records has been created.

A key change in OLE is searching and browsing for records. The previous Describe Workbench and DocStore Search have been replaced by a single Search Workbench interface which allows searching of Bibliographic, Holdings, Item, E-Holdings, and Licenses or browsing by call numbers and titles. This new search will allow library staff to utilize customizable facets along with standard Boolean searching.

OLE includes four core modules: Select and Acquire, Describe and Manage, Deliver, and System Integration.

Select and Acquire Modules includes:

- Claiming functionality has been added to the module. While in 1.0 users could receive items from the Receiving Queue, the interface has been adapted to become the Receiving and Claiming Queue. If a particular order should never be claimed, the titles are marked from the Requisition or Purchase Order. Claim notices can be accessed easily from the Select/Acquire tab.
- Donor information may now be tracked and several reports on donor funds are system-generated in OLE.
- Additional modifications have been made to the Disbursement Voucher to allow for deposit accounts. The initial payment is made from the Disbursement Voucher, and then Purchase Orders and Invoices can be created to track item purchases.
- The Invoice document has been enhanced to perform duplication checks, \$0 invoices, and as an added convenience to users, cloning is available.
- Imported records with order data in the 9xx fields are now mapped to purchase orders. Import profiles have also been established to allow the ingestion of electronic holdings.

Describe and Manange Module includes:

- Global changes to Holdings, Items, and E-Holdings is a new feature available in 1.5 that allows users to apply changes to multiple records at one time.
- Analytics are also new for 1.5. The purpose of the feature is to allow a user of a library's discovery layer to determine the status (loaned, missing, etc.) of an item in a monographic series regardless of whether the user finds the item in the catalog via the bibliographic record for the series or the bibliographic record for an individual title in the series. Bound-withs have been available since the 0.8 release.
- Clickable URLs have been added to OLE's editors. Any URL on the bibliographic, holdings, or item record is now hyperlinked.
- Several new MARC bibliographic record functionality improvements were added such as field-level validation and an improved user interface.

Deliver Module includes:

- OLE has improved printing of routing and hold slips and included functionality to print call slips.
- Claim returns can be viewed, created and updated not only from the loan screen but also the patron and item records. Missing pieces and damaged items functionality have been modified to continue to allow items to be circulated if libraries so choose. Missing pieces and damaged items notes can also be viewed from the patron and item records, not only the loan screen.
- Item records now display the patron that has borrowed the item.
- Additional operator warnings have been created for circulating materials still checked out, overdue, or lost. New blocks prevent staff from renewing an item that precedes the existing due date.

System Integration includes:

During the 1.5 development, OLE underwent significant structural changes.

- Due to performance and scalability concerns with Jackrabbit, OLE now incorporates a relational database management system.
- The DocStore schema was refactored and the Instance wrapper has been removed from Holdings and Item records. (Labels remain in the interface but these will be removed in a future release).
- OLE saw several software upgrades: Rice to 2.3.2, MySQL to 5.6.12, and Tomcat to 7. Progress to make OLE a unified environment has been completed.
- Significant user interface changes have impacted OLE. The portal has been reorganized to correspond with library needs.
- OLE now provides an API to interact with automated storage retrieval systems. In 1.5, the ASR system interacting with OLE is Dematic. Additionally, an API was created to interact with NCIP for resource-sharing systems (ILL, self-service kiosks, consortial borrowing).

Known Bugs and Issues

Known issues to be addressed in OLE 2.0 include:

Initial import of records continues to need improvement and documentation. It has been noted that OLE needs a standard format separate from the underlying data structure to more easily load the records.

Currently doing an initial load of records and documents into OLE requires library financial data to be structured in a very particular way and only with .csv files.

While OLE strives to be compatible with standard browsers, “support” implies that best efforts will be made to ensure that data loss or unusably corrupted displays do not occur with a plugin and extension free instance of the browser software. There have been a few issues with plugins brought to our attention during 1.5 development.

Updating Persons in KIM will cause an exception. This is a known issue for Rice 2.3.6, the Rice version that OLE 1.5 is packaged with. A fix was added in Rice 2.4, which will be available in OLE 2.0. For the work around suggestion, see OLE-5972.

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

OLE Technical Notes

All technical installation notes for Kuali OLE Release 1.5 can be found on the public documentation site at [OLE Technical Documentation](#).

OLE User Documentation and Links 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 2.0, for the final quarter of 2014.

OLE 2.0 will be focused on new electronic resource management (ERM) development, which will include subscription and organization information management, GOKb imports, a new platform record, and linking E-Resources to Purchase Orders and other E-Resources. In addition to ERM, 2.0 will include fiscal year rollover basic functionality, upgrade to Solr 4, a major Rice upgrade that includes a conversion from the Kuali Nervous System (KNS) framework to the Kuali Rapid Application Development (KRAD) framework that modernizes the KFS-inherited screens, and additional initial bulk load procedures for data migration (see OLE-6672).

See our timeline (<http://www.kuali.org/ole/roadmap>) for a big picture of the 2.0 release, as well as what has been developed in the current and past releases.

OLE Acknowledgements

<https://wiki.kuali.org/display/OLE/Licenses+and+Acknowledgements+for+OLE+1.5>

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.