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## January 2015 Update

**Grace Agnew – Rutgers**

**Bethany Sewell - TCNJ**

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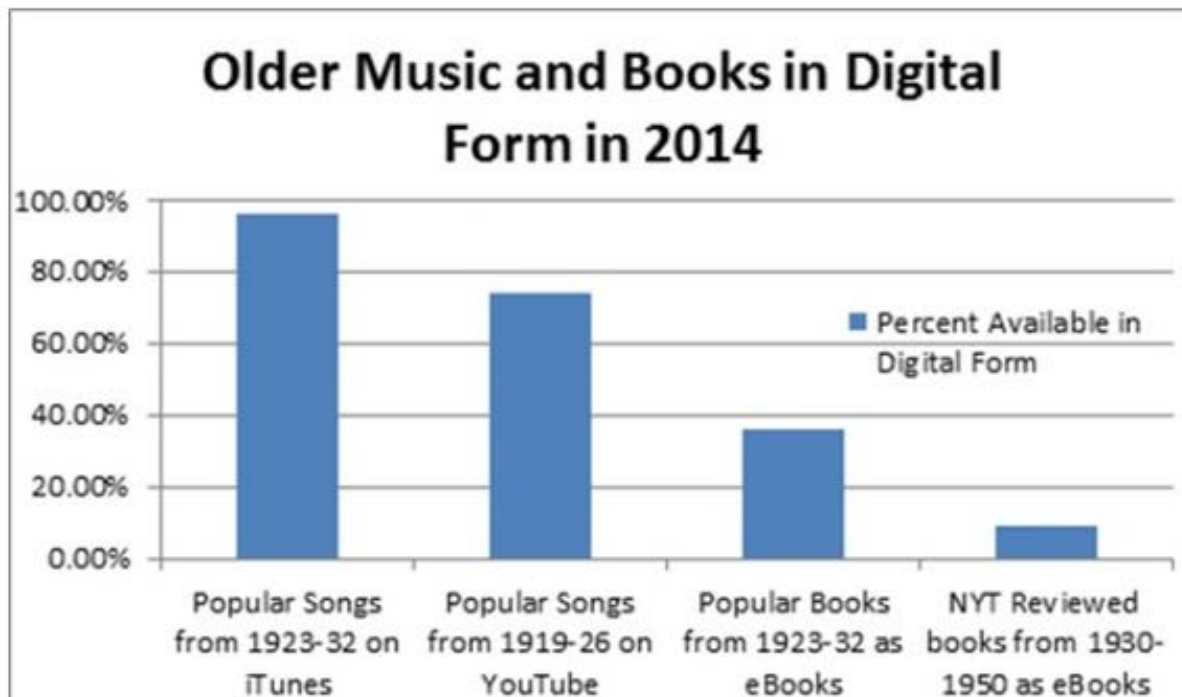
**Special Thanks to Dave Hoover, Rutgers, and the OLE implementation team at Lehigh University for installation and technical support**



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**Resource use** is the foundation of a robust, responsive statewide academic library collaboration.

**Analog resources** remain an important and heavily used investment.



- Copyright issues – author renegotiation required
- Formatting issues – Large numbers of print pages not inherently digital friendly

R. J. Rosen (2014 March 18). Why are so few Books from the 20<sup>th</sup> Century available as eBooks?. *The Atlantic*



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## **Rutgers University Libraries**

**4 million+** resources

Replacement at today's prices: **\$108 Million+**

2014 searches of the RUL library catalog: **1,256,685**

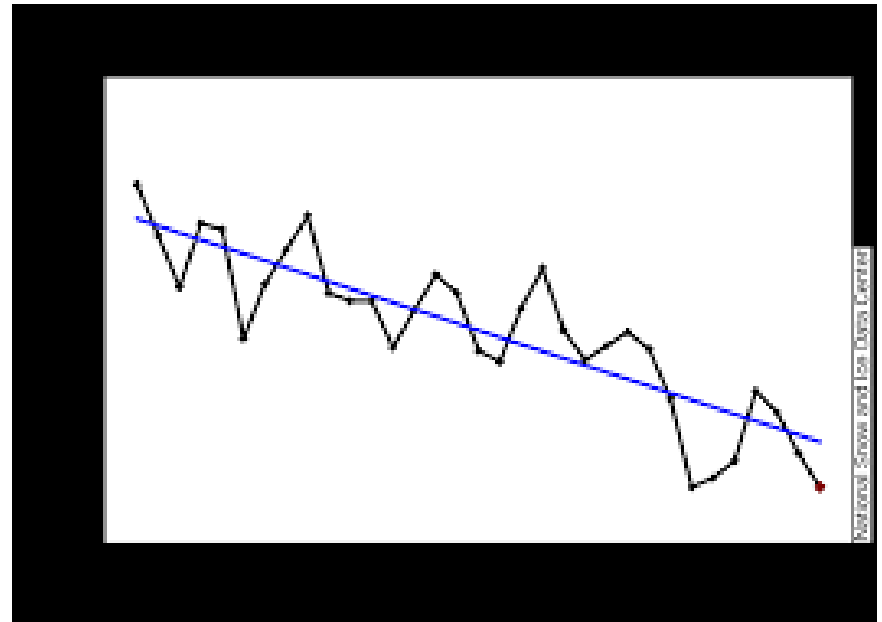
2014 searches, Top licensed database, Academic Search Premiere: **471,239**

**Total circulations, FY2014 440,177**



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**Studies show:**





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**Federated catalog with full circulation functionality will allow:**

**Nuanced analysis using patron statistical categories**

**Collection development practices to support the unique strengths of universities, including shared storage**

**Alignment of collections across the curriculum at all participating universities, with the ability to loan collection subsets across libraries**

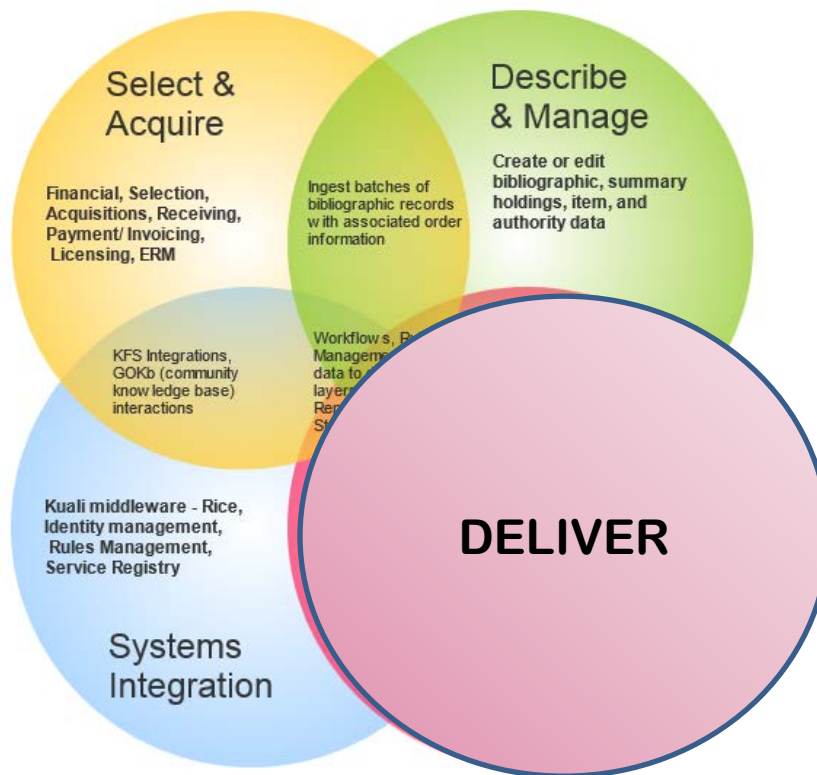
**No disruption or penalties to users**



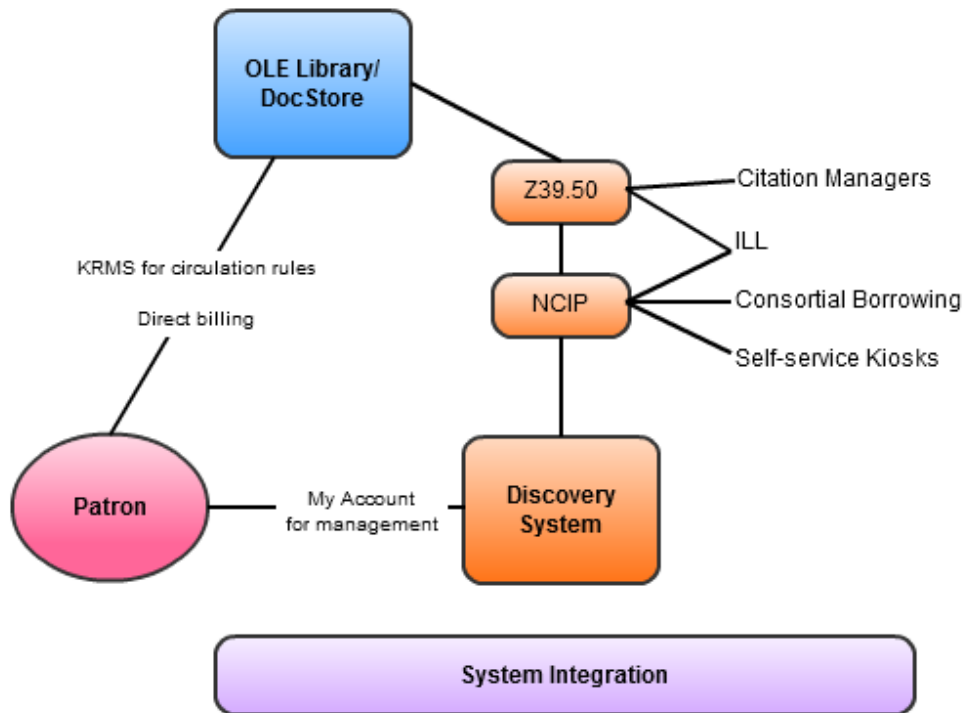
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## OLE Modules

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**Patron record** preferences allows library users to specify their best means of contact.

**Item Records/Fast Adds.** If an item does not have a barcode, library staff may quickly create a brief bibliographic record and check out the item.

**Circulation Desks** are the work areas that provide services for items in designated shelving locations. Operators are authorized to work at designated Circulation Desks.

**Loan/Renewal** of library OLE leverages Quali Rules Management System (KRMS), a flexible and extendable business rules management tool, as a framework for the circulation policies (e.g., determining loan periods).

**Return** of circulated resources

**Requests** – hold for pickup or deliver

**Notices and Other Batch Processes** include due date reminders, expired hold and hold notices, replacement fees and overdue fines as well as changing item status from “recently returned” to “available”

**“My Account” Features for Patrons** to view their library materials and perform some circulation functions

**Billing for lost items, overdue fines and other charges.**

**NCIP standards** for sharing circulation information across systems



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## Upcoming Release: Kualii OLE 1.6

Release date: Q1, 2015

### Select and Acquire

- Fiscal Year Rollover

### System Integration

- Internationalization

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- Circulation Standards: SIP2

### Scheduled Implementation

- School of Oriental and African Studies (SOAS),  
University of London

## Upcoming Release: Kualii OLE 2.0

Target Date: Q2, 2015

### Select and Acquire

- Electronic resources management
  - Records for tracking platforms, subscriptions, and vendors/organizations
  - Initial GOKb integration
  - Triggers/alerts for future actions
  - Generate reports

### System Integration

- Batch loaders

**VALID has installed V. 1.5.3**

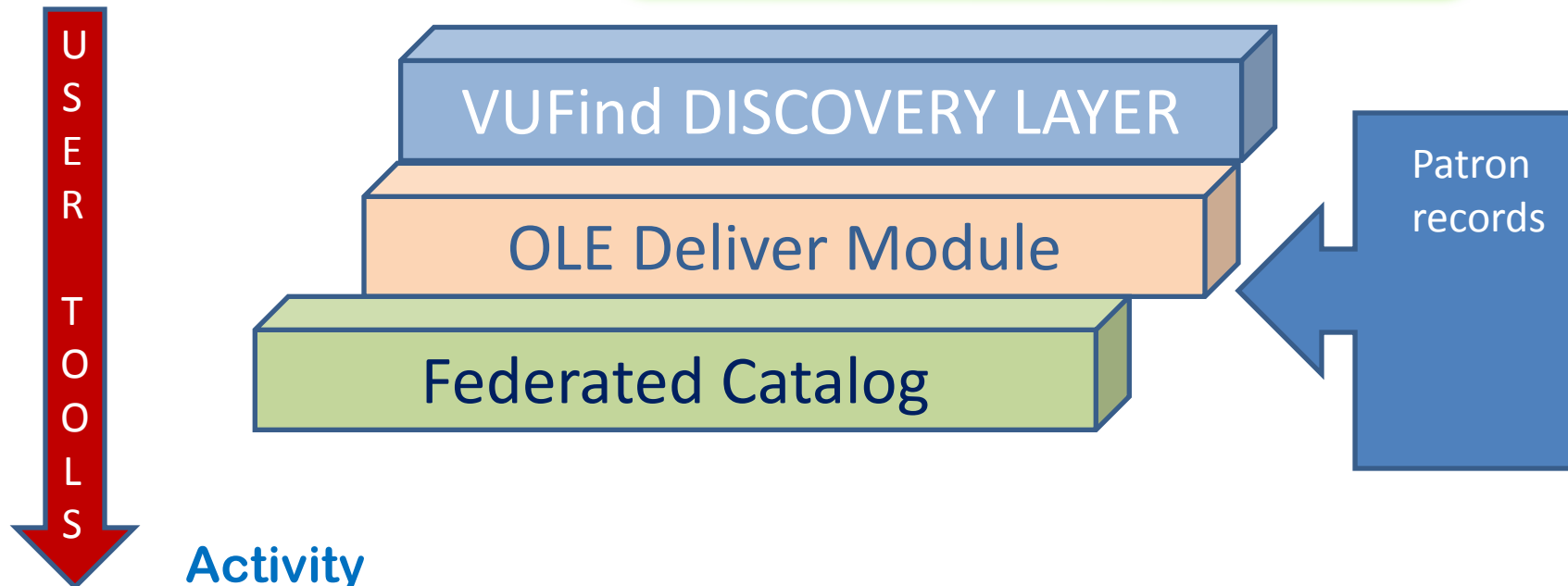


# OLE and KualiCo

Since the Kuali Foundation announced Kuali 2.0 and the formation of KualiCo, the Kuali OLE project has been investigating options for the future. As part of this process we have documented our Core Values, which will inform our decision-making:

- \* OLE is committed to developing an **open source, community directed library management system that is freely available for implementation by libraries and consortia;**
- \* OLE is committed to building an innovative next generation technology environment that leverages integration with university enterprise systems and external vendor systems;
- \* OLE is committed to re-examine library business operations and develop new workflows that reflect the changing nature of library materials and new approaches to serving scholarly research;
- \* OLE is committed to building **an inclusive partnership focused on financial support, collaborative functional and technical design, software development, and support for OLE implementers.**

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## Activity

place holds, renew, etc.

## Bookshelf

favorites

Smartphone App – Same as card at desk . Find and reserve book for pickup or delivery



## OLE's Design Flexibility is Key

### Traditional Matrix is table driven

Name	Description	Library	User Profile	Item Type	Circulation
DEFAULT	Rule used if specific combination is not defined	ALL	ALL	ALL	4WEEK
RRS	Materials checked out to RRS users	ALL	RRS	ALL	UNLIMITED
LIBTRANSIT	Any item may be charged to intransit user for ill	ALL	IN-TRANSIT	ALL	UNLIMITED
ILLDEFAULT	For items loaned to ILS users	ALL	ILL	ALL	10WEEK
PALCIDEF	For items loaned to PALCI Users	ALL	PALCI	ALL	16WEEK
UPGRADDEF	Undergraduate default circulation rule	ALL	UGRAD	ALL	6WEEK
GUEST	Guest Borrowers	ALL	GUEST	ALL	6WEEK
FACSTDFLT	faculty-staff combined	ALL	FACSTF	ALL	TERM
GRADEFAULT	RU Graduate student default circulation rule	ALL	GRAD	ALL	TERM
MEDBOOK-Y	UMD Book Default	ALL	ALL	MEDBOOK-Y	6WEEK
ILL-Y	ill materials; one-renewal	ALL	ALL	ILL-Y	4WEEK-:
ILL-N	ill materials; non-circ; non-renewable	ALL	ALL	ILL-N	NON-CII
ILLCIC-Y	illcic materials; one-renewal	ALL	ALL	ILLCIC-Y	8WEEK-:
ILLCIC-N	illcic materials; non-circ; non-renewable	ALL	ALL	ILLCIC-N	NON-CII
PALCI-Y	palci materials; one-renewal	ALL	ALL	PALCI-Y	6WEEK-:
ARTISTBK-N	Item normally does not circulate	ALL	ALL	ARTISTBK-N	NON-CII
ATLAS-N	Item normally does not circulate	ALL	ALL	ATLAS-N	NON-CII
AUDIOCAS-N	Item normally does not circulate	ALL	ALL	AUDIOCAS-N	NON-CII
AUDIOCD-N	Item normally does not circulate	ALL	ALL	AUDIOCD-N	NON-CII
AUDIOCYL-N	Item normally does not circulate	ALL	ALL	AUDIOCYL-N	NON-CII
AUDIODSC-N	Item normally does not circulate	ALL	ALL	AUDIODSC-N	NON-CII
AUDIOSTR-N	Item normally does not circulate	ALL	ALL	AUDIOSTR-N	NON-CII
AUDIOTPE-N	Item normally does not circulate	ALL	ALL	AUDIOTPE-N	NON-CII
BOOK-N	Item normally does not circulate	ALL	ALL	BOOK-N	NON-CII
BROADSID-N	Item normally does not circulate	ALL	ALL	BROADSID-N	NON-CII
BROADM-N	Item normally does not circulate	ALL	ALL	BROADM-N	NON-CII



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## OLE's Design Flexibility is Key

OLE creates **rules**, that are **XML** statements about:

- **Patrons**
- **Locations**
- **Item types**
- **Other conditions** (number of books checked out, blocks, etc.)

**Three or Four-character prefix for patrons, items is key:**

**NJIT\_FacStf**

**RUL\_Guest**



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OLE **rules** are **XML** arguments of conditions that are **true** or **false**

These are grouped into a workflow or scenario of use, known as an **Agenda**

**The same rules engine is used for everything, not just circulation.**

This makes it easy to integrate staffing rules with circulation rules to ensure local stewardship of patrons and collections

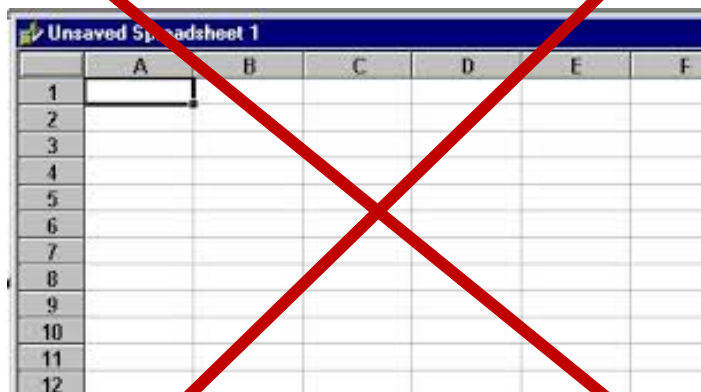


	<a href="https://docs.google.com/a">https://docs.google.com/a</a>	Name	Proposition	True Action	False Action
1					
2	Agenda	General Checks	Triggered when Patron Barcode entered		
3	Rule	ValidatePatronDate	If patron record marked inactive	"This patron's record has been marked inactive."	Run VerifyActivationDate
4	Rule	VerifyActivationDate	if activation date is null	Run VerifyExpirationDate	Run activationDatecurrentDateFunction
5	Rule	VerifyExpirationDate	If expirationDate is null	"This patron has no Activation or Expiration Date"	Run PastExpirationDate
6	Rule	PastExpirationDate	If function expirationDatecurrentDateFunction is true	"This patron's record expired."	
7	Rule	PastActivationDate	If activationDatecurrentDateFunction is true	Run ExpirationDateValue	Run ValidExpirationDate
8	Rule	ExpirationDateValue	If expirationDate is not null AND expirationDatecurrentDateFunction is true	"This patron's record expired."	
9	Rule	ValidExpirationDate	If expirationDate is not null AND expirationDatecurrentDateFunction is true	"This patron's record expired."	Run ValidExpirationDate_falseActionRule
10	Rule	ValidExpirationDate_falseActionRule	[no proposition]	"This patron's record is not active."	
11					
12	Rule	ProxyVerification	If IsProxyPatron (function) is true	Run ValidateProxyPatronDate	
13	Rule	ValidateProxyPatronDate	If activeProxyPatron is false	"This proxy patron's record has been marked inactive."	Run VerifyActivationDateForProxy
14	Rule	VerifyActivationDateForProxy	If proxyActivationDateString is null	Run VerifyExpirationDateForProxy	Run PastActivationDateForProxy
15	Rule	VerifyExpirationDateForProxy	If proxyExpirationDateString is null	"This proxy patron has no Activation or Expiration Date."	Run PastExpirationDateForProxy
16	Rule	PastExpirationDateForProxy	If proxyExpirationDatecurrentDateFunction is true	"This proxy patron's record has expired."	
17	Rule	PastActivationDateForProxy	If proxyActivationDatecurrentDateFunction is true	Run ExpirationDateValueForProxy	Run ValidExpirationDateForProxy
18	Rule	ExpirationDateValueForProxy	If proxyExpirationDatecurrentDateFunction AND proxyExpirationDate is null	"This proxy patron's record expired."	
19	Rule	ValidExpirationDateForProxy	If proxyExpirationDate is null AND proxyExpirationDatecurrentDateFunction is true	"This proxy patron's record expired."	Run ValidExpirationDateForProxy_falseActionRu
20	Rule	ValidExpirationDateForProxy_falseActionRule		"This proxy patron's record is not active."	
21					
22	Rule	IsGeneralBlock	If generalBlocktrue is true	"This patron has a general block"	
23	Rule	AddressVerification	If isAddressVerifiedfalse is NOT true	"Patron's street address has not been verified."	
24	Rule	Check Digit Routines For Patron	If patronBarcode 10002 (sic) pattern AND digitRoutine is true	"The format of the patron's barcode is invalid."	

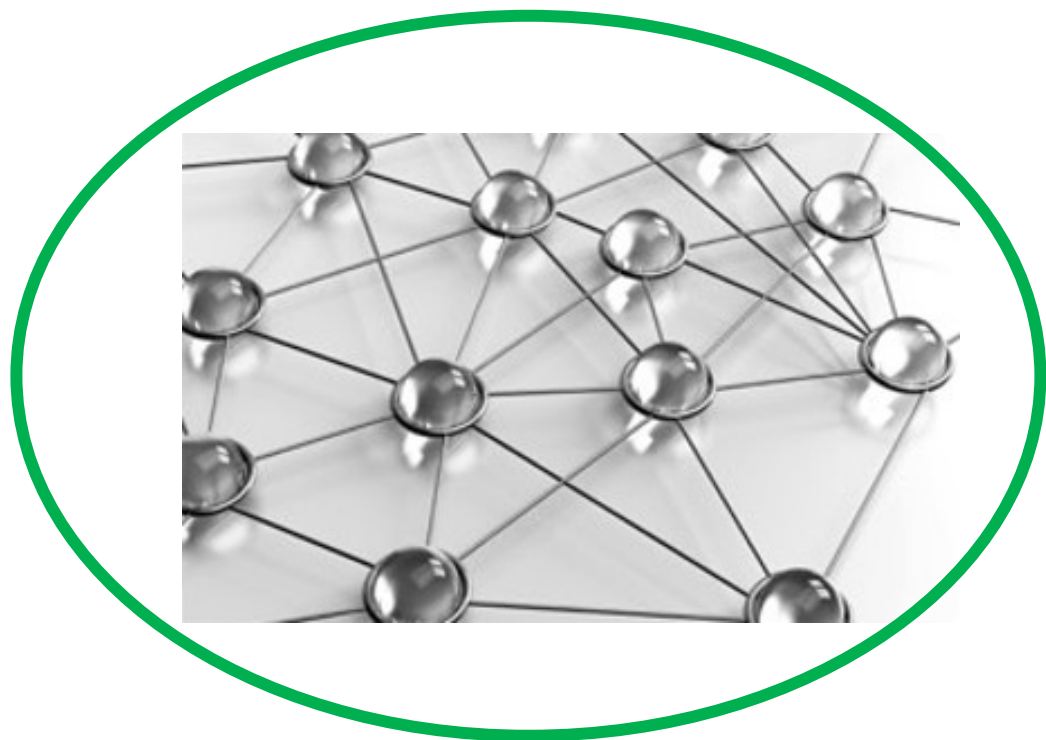




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**Narrow, static workflow**



**Dynamic resource sharing ecosystem**



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## **Demonstration of Features**

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**Chris Sterback – Rutgers**

**Ann Hoang – NJIT**

## **2015 Plans**

**Ann Hoang – NJIT**