

Demo of Kuali OLE Deliver Module

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VALID University Circulation Rules

OLE can be configured to circulate materials with each institution's local circulation rule or the universal borrowing rule in VALID. For example:

- TCNJ – undergrad student – 3 weeks
- NJIT – graduate student – 4 weeks
- Rutgers – fac/stf – term loan (fixed date)
- VALID University – Universal Borrowing- 16 weeks with no recalls and fines

Kuali OLE Basic Functionality

- Create a new TCNJ undergrad patron record (Bethany Sewell)
- Checkout a TCNJ book to an undergrad TCNJ student
- View VuFind for checked out status
- Return the checked out book to TCNJ Circulation Desk
- Check out a Fast-add TCNJ item (circ on the fly) at TCNJ Circulation Desk with a return note of “Route to TCNJ Tech Services”

Kuali OLE Basic Functionality

- Kuali OLE software version 1.5.3
- Staff client is browser based and works best with Firefox browser
- Interface of the Deliver module (Circulation)

The screenshot displays the Kuali OLE Deliver module interface. At the top left, the Kuali logo is visible with the tagline 'open library environment'. The main navigation bar includes tabs for 'Deliver', 'Describe', 'Select/Acquire', 'Maintenance', and 'Admin'. The user is logged in as 'ole-quickstart'. The interface is divided into two main sections: 'Circulation' and 'Patron'. The 'Circulation' section contains links for 'Loan', 'Request', 'Request Re-order', and 'Return'. The 'Patron' section contains links for 'Deliver Notices', 'Patron', and 'Patron Bill'. A search bar at the top includes 'action list', 'doc search', and 'search workbench'. A blue arrow points from the 'Circulation' section to a detailed view of the 'Circulation' section. Another blue arrow points from the 'Patron' section to a detailed view of the 'Patron' section. A third blue arrow points from the 'Patron' section to a detailed view of the 'Patron' section. The bottom of the interface shows the system version 'OLE Financial System :: 1.5.3 :: 2014-09-18 11:22 UTC (MySQL)' and the user 'dev1' with 'Login' and 'Logout' buttons.

Kuali OLE Basic Functionality

1. Search for a patron name
2. Patron not found
3. Create a new patron record

The screenshot shows the Kuali OLE Patron Lookup page. The header includes the Kuali logo, navigation tabs (Deliver, Describe, Select/Acquire, Maintenance, Admin), and system information (OLE Financial System :: 1.5.3 :: 2014-09-18 11:22 UTC (MySQL)). The user is logged in as 'ole-quickstart' and impersonating 'dev1'. The page title is 'Patron Lookup'.

The search form contains the following fields:

- Barcode: []
- First Name: []
- Middle Name: []
- Last Name: [sewell]
- Patron Type: []
- Email Address: []
- Phone Number: []
- Patron Id: []
- Active Indicator: [Yes] [No] [Both]

Buttons at the bottom of the form are 'Search', 'Clear Values', and 'Cancel'. A 'Create New' button is located in the top right corner.

Annotations on the page:

- A blue circle with the number '1' is placed over the 'Last Name' field.
- A blue circle with the number '3' is placed over the 'No values match this search.' message box.
- A blue circle with the number '3' is placed over the 'Create New' button.
- A blue arrow points from the 'Create New' button to the 'Create New' text in a separate box.
- A blue arrow points from the 'No values match this search.' message box to the 'Create New' button.

Kuali OLE Basic Functionality

- 1. OLE treats every record as a Document which must have a name
- 2. Enter information in required fields marked with an asterisk (*)

* indicates required field

Document Overview

* Description: TCNJ Patron

Explanation:

Organization Document Number:

Overview

Patron Id: * Barcode: 2903004591131 * Patron Type: TCNJ Undergraduate Student Source: Upload Image: Browse... No file selected. Upload

Statistical Category: * Activation Date: 01/07/2015 Expiration Date: Active:

Contacts

Name

Name Type: Preferred Title: * First Name: Bethany Middle Name: * Last Name: Sewell Suffix:

Address

Show 10 entries

* Address Type	* Address Source	Valid From	Valid To	Address Verified	Preferred Address	Active	Actions
Campus	Operator			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	add
Line 1: 2000 Pennington RD	Registrar Load Master Feed Operator Borrower	Line 3:	City: Ewing	State: NEW JERSEY	Postal Code: 08628		

Country:

Showing 0 to 0 of 0 entries

First Previous 1 Next Last

Phone

Show 10 entries

Phone Type	Phone Number	Extension Number	Country	Preferred Number	Active	Actions
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Kuali OLE Basic Functionality

- Circulate a TCNJ book to a TCNJ undergraduate student
- Student searches VALID VuFind; staff searches Kuali OLE

The image displays the Kuali OLE Search Workbench interface. At the top, the 'Document Type' is set to 'Bibliographic'. Below this, the 'Search Conditions' section provides instructions on how search conditions are applied and lists special characters that are ignored. The main search area shows a search for 'aids' with 'All of these' selected. The search results are displayed in a table with columns for 'Title' and 'Action'. The first result, 'AIDS : the burdens of history /', is circled in blue. A detailed view of this result is shown in an inset window, which includes the title, publication year (1988), table of contents, call number (RA644.A25.A3768-1988), location (Multiple Locations), and a list of participating institutions: New Jersey Institute of Technology, William Paterson University, Drew University, The College of New Jersey, and Rutgers University. The inset also shows the 'Add to Favorites' button and the 'Get it' button.

Search Workbench

Document Type:

Select Records By:

Search Conditions

Note -
Search conditions are applied in the order they appear. e.g. (((Condition 1 and Condition 2) or Condition 3) and Condition 4).
The following special characters @, #, %, \$, /, ~, !, (,), {, }, <, >, ;, ', : , - , \, ^, are ignored in search text.

Search For: All of these

Search Results

Show entries

Title	Action
AIDS : the burdens of history /	<input type="checkbox"/>
American paradise : the world of the Hudson River school	<input type="checkbox"/>
Artificial intelligence for society /	<input type="checkbox"/>

Search. Discover. Share.

aids All Fields Find Advanced

Home Search: aids

Suggested Topics... within your search.
[AIDS \(Disease\) \(1\)](#) [Acquired Immunodeficiency Syndrome \(1\)](#) [History \(1\)](#)
[Medicine \(1\)](#) [Methodology \(1\)](#) [Research \(1\)](#)
[more...](#)

Showing 1 - 1 of 1 for search: 'aids', query time: 0.35s

Sort: Relevance

1 [AIDS : the burdens of history /](#) [Add to Favorites](#)
Published 1988
Table of Contents: "...Introduction : AIDS, public policy, and historical inquiry / Elizabeth Fee and Daniel M. Fox."
Call Number: RA644.A25.A3768-1988
Located: Multiple Locations

[New Jersey Institute of Technology](#)
[William Paterson University](#)
[Drew University](#)
[The College of New Jersey](#)
[Rutgers University](#)

Book

Get it

Narrow Search

Institution

Library

Format

Call Number

Language

Year of Publication
From: To:

Set

Kuali OLE Basic Functionality

Check out screen

1. Login into the proper Circulation Desk
2. Scan patron barcode
3. Scan item barcode

The screenshot shows the Kuali OLE system interface. At the top, there is a navigation bar with the Kuali logo and the text "open library environment". Below this, there are several tabs: "Deliver", "Describe", "Select/Acquire", "Maintenance", and "Admin". The user is logged in as "ole-quickstart" and impersonating "dev1". The main content area is titled "Loan" and contains a "Return" button. A "Patron" field is populated with "2903004591131". Below this, there is a "Loan" section with a "Return" button, "Close" and "Clear Patron" buttons, and a "Patron Details" section. The "Patron Details" section includes a table with columns for Name, Type, Preferred Address, Phone, Email, and Photograph. The patron's name is "Bethany Sewell", type is "TCNJ Undergraduate Student", and address is "2000 Pennington RD, Ewing, NJ, 08628". There is also an "Item" field populated with "33008005341981". A "Circulation Desk" dropdown menu is set to "CD-TCNJ". Annotations 1, 2, and 3 are placed on the screen to highlight the "Circulation Desk" dropdown, the "Patron" field, and the "Item" field, respectively.

Annotations:

- 1. Circulation Desk: CD-TCNJ
- 2. Patron: 2903004591131
- 3. Item: 33008005341981

Kuali OLE Basic Functionality

- Checkout a book to a TCNJ-undergraduate student

Loan ?

Return

Circulation Desk: CD-TCNJ

Close Clear Patron Alter Due Date Claims Return Missing Piece Damaged Renew

Patron Details

Name	Type	Preferred Address	Phone	Email	Photograph
Bethany Sewell	TCNJ Undergraduate Student	2000 Pennington RD, Ewing, NJ, 08628		sewellb@tcnj.edu	

Patron: 2903004591131

Item:

Fast-Add item

Show All Items Currently Checked Out

Items Checked Out This Session

Show 10 entries

Select	Barcode	Title	Author	Location	Call Number	Copy Number	Enumeration	Chronology	Proxy Brrower	No Of Renew	Item Status	Due Date	Claims Return Note	Claims Return Date	Missing Piece Note	Item Damaged Note
<input type="checkbox"/>	33008005341981	AIDS :the burdens of history /		TCNJ - Main Library-TCNJ - Main Library - Stacks	RA644.A25 A3768 1988					0	LOANED	01/28/2015 11:59 PM				

Showing 1 to 1 of 1 entries

Select All Deselect All

csv xml xls

TCNJ Undergraduate
loan period
3 weeks

Kuali OLE Basic Functionality

AIDS : the burdens of history /

Other Authors: [Fee, Elizabeth](#), [Fox, Daniel M.](#)


Format:  Book

Language: English

Published: Berkeley : University of California Press, c1988.

Subjects: [AIDS \(Disease\)](#) > [History](#).
[AIDS \(Disease\)](#) > [Social aspects](#).
[Medicine](#) > [History](#) > [Research](#) > [Methodology](#).
[Acquired Immunodeficiency Syndrome](#)
[Acquired Immunodeficiency Syndrome](#) > [history](#)

Online Access: [New Jersey Institute of Technology](#)
[William Paterson University](#)
[Drew University](#)
[The College of New Jersey](#)
[Rutgers University](#)

Tags: No Tags, Be the first to tag this record!  [Add Tag](#)



Holdings Description Table of Contents Comments Staff View

Internet

[New Jersey Institute of Technology](#)
[William Paterson University](#)
[Drew University](#)
[The College of New Jersey](#)
[Rutgers University](#)

TCNJ - Main Library - Stacks

Call Number: RA644.A25 A3768 1988

Copy :  **LOANED** Due: 2015-01-28 23:59:00  [Recall This](#)

How a checked out book is displayed in VuFind OPAC



Kuali OLE Basic Functionality

- Fast-Add item (Circ on the fly) to a “fac/staff” Rutgers status
 - Search for item – item not found
 - Click “Fast-Add Item”


The screenshot shows the top navigation bar with 'action list', 'doc search', and 'search workbench' buttons. Below is a breadcrumb trail 'Home > Loan'. The main heading is 'Loan ?' with a 'Return' button. Below that are 'Close' and 'Clear Patron' buttons. A section titled 'Patron Details' is partially visible, showing a table with columns: Name, Type, Preferred Address, Phone, and Email. The first row contains: Christopher Sterback, RUL_FACSTF, 47 d..., piscataway,NJ,08854, 8484455899, ste... Below the table are input fields for 'Patron:' (29030004488015) and 'Item:' (39030041626013), each with a search icon. At the bottom, there is a 'Fast-Add item' button circled in blue, and a 'Show All Items Currently Checked Out' button. A blue circle with the number '1' is positioned near the 'Fast-Add item' button.

This zoomed-in view shows the 'Loan ?' heading and the 'Return' button. Below are 'Close' and 'Clear Patron' buttons. A red error message reads 'Item barcode does not exist.' Below the error are input fields for 'Patron:' (29030004488015) and 'Item:' (39030041626013), each with a search icon. At the bottom, the 'Fast-Add item' button is circled in blue, and the 'Show All Items Currently Checked Out' button is visible. A blue circle with the number '2' is positioned in the top right corner.

Kuali OLE Basic Functionality

- Fast-Add item (Circ on the fly) - enter required information marked with an asterisk (*)

Fast-Add item

* Title:	<input type="text" value="No Brief Candle"/>
Author:	<input type="text"/>
* Location:	Type * for all locations, other letters for matching locations <input type="text" value="TCNJ/TCNJ-STACKS"/> 
* Barcode:	<input type="text" value="39030041626013"/>
* Item Type:	<input type="text" value="Book"/> ▼
* Call Number Type:	<input type="text" value="Other Schema"/> ▼
* Call Number:	<input type="text" value="X"/>
Copy Number:	<input type="text"/>
Copy Number Label:	<input type="text"/>
* Checkin Note:	<input type="text" value="Send to <u>TCNJ</u> Tech Services"/>

Kuali OLE Basic Functionality

- Fast-Add item (Circ on the fly) is created and item is checked out to a Rutgers fac/staff person and a 16 weeks loan period

Loan ?

Return

Circulation Desk: CD-TCNJ

Close Clear Patron Alter Due Date Claims Return Missing Piece Damaged Renew

Patron Details

Name: Christopher Sterback Type: RUL_FACSTF Preferred Address: 47 davidson,piscataway,NJ,08854 Phone: 8484455899 Email: sterback@rulmail.rutgers.edu Photograph:

Patron: 29030004488015

Item:

Fast-Add item Show All Items Currently Checked Out

Items Checked Out This Session

Show 10 entries

csv xml xls

Select	Barcode	Title	Author	Location	Call Number	Copy Number	Enumeration	Chronology	Proxy Brrower	No Of Renew	Item Status	Due Date	Claims Return Note	Claims Return Date	Missing Piece Note	Item Damaged Note
<input type="checkbox"/>	39030041626013	No Brief Candle		TCNJ - Main Library-TCNJ - Main Library - Stacks	X					0	LOANED	04/29/2015 11:59 PM				

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Select All Deselect All

Kuali OLE Basic Functionality

- Fast-Add item is returned with check-in note.

Loaned Records

Show 10 entries

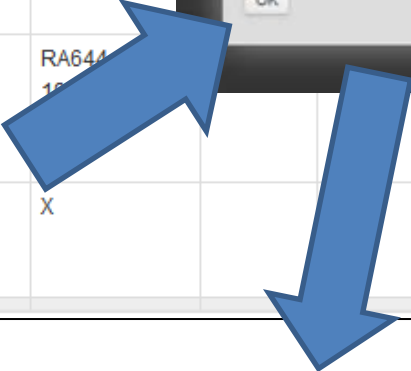
Search:

Barcode	Title	Author	Location	Call Number	Item Status	Overdue/Replacement Bill	Route Location
39030018247017	Rigoletto / Giuseppe Verdi.	Verdi, Giuseppe, 1813-1901.	RUTGERS - Alexander Library-RUTGERS - Alexander Library - Stacks	M1500.V48 R 1992			
39030015258371	AIDS : the burdens of history / edited by Elizabeth Fee and Daniel M. Fox.			RA644 18			
39030041626013	No Brief Candle		TCNJ - Main Library-TCNJ - Main Library - Stacks	X	LOANED	Book	04/29/2015 11:59 PM

Check-in Note

Send to TCNJ Tech Services

Circulation Desk Name for Routing:



Showing 1 to 3 of 3 entries

Item(s) Returned

Show 10 entries

Barcode	Title	Author	Location	Call Number	Copy Number	Enumeration	Chronology	Check-in Date	Item Status	Overdue/Replacement Bill	Route Location
39030041626013	No Brief Candle		TCNJ - Main Library-TCNJ - Main Library - Stacks	X				01/07/2015 11:59 AM	Recently Returned		CD-TCNJ

Showing 1 to 1 of 1 entries

Kuali OLE Universal Borrowing

- NJIT graduate student (Ann Hoang)
 - Borrows an NJIT book at NJIT
 - Returns it to NJIT Circulation Desk
- Rutgers staff (Christopher Sterback)
 - Borrows the same book previously borrowed by an NJIT graduate student
 - Returns it to Rutgers Circulation Desk

Kuali OLE Universal Borrowing

1. Checkout an NJIT book to an NJT graduate student with a 4 weeks loan period

The screenshot displays the Kuali OLE Universal Borrowing interface. At the top, the Kuali logo and navigation tabs (Deliver, Describe, Select/Acquire, Maintenance, Admin) are visible. The user is logged in as 'ole-quickstart' and impersonating 'dev1'. The page title is 'Loan'. A search bar for 'Patron' is present. A dropdown menu for 'Circulation Desk' is open, showing options: CD-NJIT, CD-TCNJ, CD-ALEX, CD-NJIT (highlighted), and CD-LSM. A blue circle with the number '1' is placed over this dropdown. Below the search bar, there are buttons for 'Close', 'Clear P', 'Due Date', 'Claims Return', 'Missing Piece', 'Damaged', and 'Renew'. A blue circle with the number '2' is placed over the 'Clear P' button. A section titled 'Patron Details' is expanded, showing the name 'Ann Hoang', type 'NJIT_GRAD', and email 'ahoang@njit.edu'. A blue box with white text reads 'NJIT Grad Student – 4 weeks loan period'. Below this, there is a section for 'Items Checked Out This Session' with a dropdown for 'Show 10 entries'. A table lists the checked-out items. A blue circle with the number '3' is placed over the 'Renew' column of the table. The table has columns: Select, Barcode, Title, Author, Location, Call Number, Copy Number, Enumeration, Chronology, Browser, Renew, Item Status, Due Date, Claims Return Note, Claims Return Date, Missing Piece Note, and Item Damaged Note. The first entry is for barcode 39030041626252, titled 'Bene?ts reader's encyclopedia.', located at 'NJIT Valid University-NJIT - Van Houten Library - Stacks', with call number 'PN41 .B4 1987', copy number 0, and item status 'LOANED'. The due date is '02/04/2015 11:59 PM'. The bottom of the page shows 'Showing 1 to 1 of 1 entries'.

Select	Barcode	Title	Author	Location	Call Number	Copy Number	Enumeration	Chronology	Browser	Renew	Item Status	Due Date	Claims Return Note	Claims Return Date	Missing Piece Note	Item Damaged Note
<input type="checkbox"/>	39030041626252	Bene?ts reader's encyclopedia.		NJIT Valid University-NJIT - Van Houten Library - Stacks	PN41 .B4 1987	0				0	LOANED	02/04/2015 11:59 PM				

Kuali OLE Universal Borrowing

- 1. NJIT graduate returns the checked out book to an NJIT Circulation Desk
- 2. Checked out status

Return ?

Item: * Check-in Date: Time: **1** Circulation Desk:

Item(s) Returned

Show entries **2**

Barcode	Title	Author	Location	Call Number	Copy Number	Enumeration	Chronology	Check-in Date	Item Status	Overdue/Replacement Bill	Route Location
39030041626252	Benét's reader's encyclopedia.		NJIT Valid University-NJIT - Van Houten Library - Stacks	PN41 .B4 1987				01/07/2015 02:27 PM	Recently Returned		CD-NJIT

Kuali OLE Universal Borrowing

- 1. Check out the same NJIT book to a Rutgers fac/staff status
- 2. VALID OLE Loan period is 16 weeks

Loan ?

Circulation Desk:

Patron Details

Name	Type	Preferred Address	Phone	Email	Photograph
Christopher Sterback	RUL_FACSTF	47 davidson,piscataway,NJ,08854	8484455899	sterback@rulmail.rutgers.edu	

Patron:

Item:

Items Checked Out This Session

Show entries

Select	Barcode	Title	Author	Location	Call Number	Copy Number	Enumeration	Chronology	Proxy Borrower	No Of Renew	Item Status	Due Date	Claims Return Note	Claims Return Date	Missing Piece Note	Item Damaged Note
<input type="checkbox"/>	39030041626252	Bene?ts reader's encyclopedia.		NJIT Valid University-NJIT - Van Houten Library - Stacks	PN41 .B4 1987					0	LOANED	04/29/2015 11:59 PM				

Showing 1 to 1 of 1 entries

Kuali OLE Universal Borrowing

- 1. Return the NJIT book to a Rutgers Circulation Desk
- 2. Item returned status
- 3. In-Transit status with a print slip for the book

Return ?

Item: * Check-in Date: Time: Circulation Desk:

Item(s) Returned

Show entries

Barcode	Title	Author	Location	Call Number	Copy Number	Enumeration	Chronology	Check-in Date	Item Status	Overdue/Replacement Bill	Route Location
39030041626252	Benét's reader's encyclopedia.		NJIT Valid University-NJIT - Van Houten Library - Stacks	PN41 .B4 1987				01/07/2015 03:02 PM	In Transit		CD-NJIT

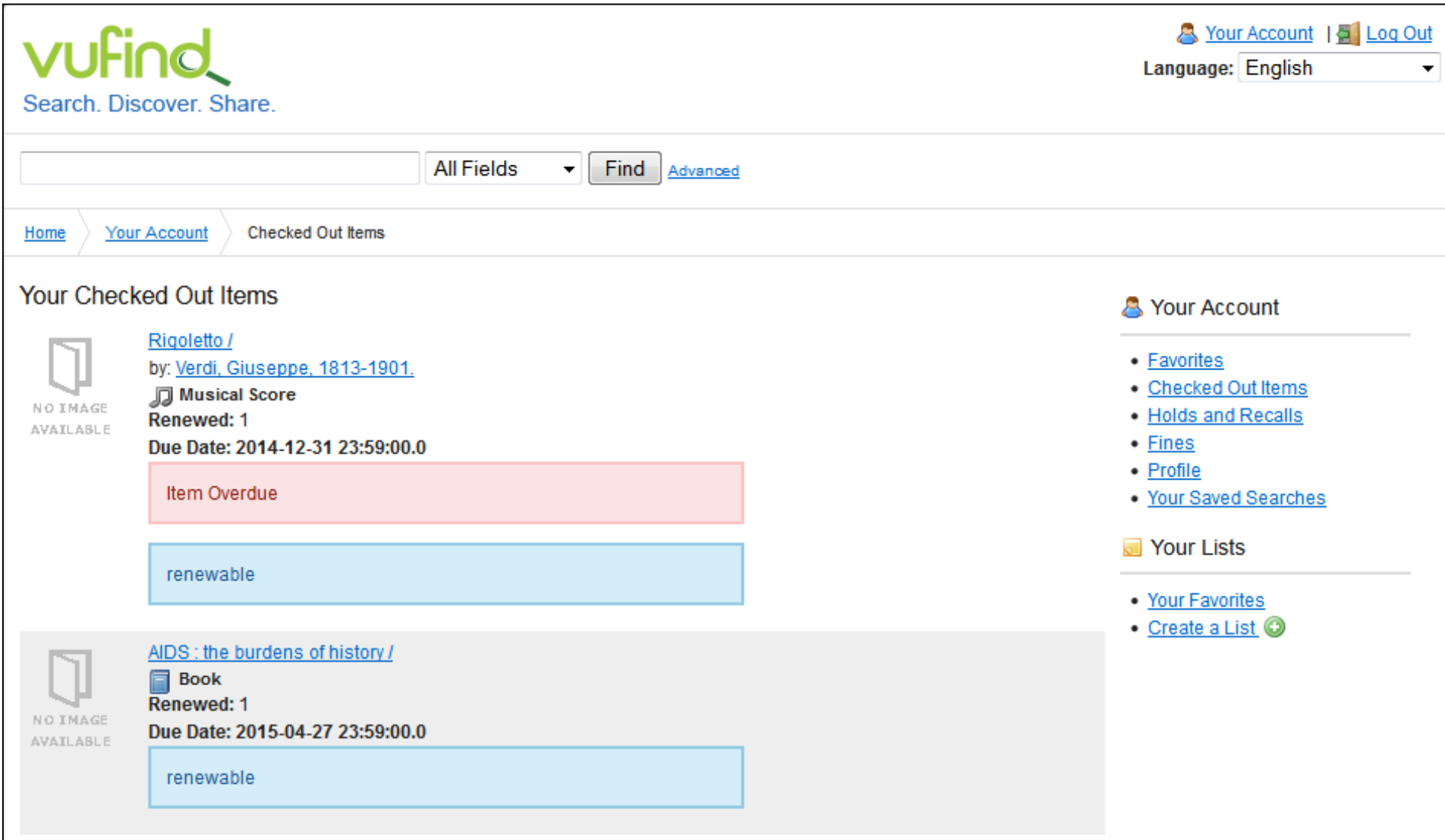
Showing 1 to 1 of 1 entries

Routing Slip In-Transit

Route To	:	CD NJIT
Date/Time	:	01/07/2015 03:02 PM
Route From	:	CD Alexander
Item Barcode	:	39030041626252
Title	:	Benet's reader's encyclopedia.
Call Number	:	PN41 .B4 1987
Copy Number	:	

Kuali OLE Integration with VuFind

- VuFind “My Account” – Checked Out Items, Holds/Recalls, Fines, Profile



The screenshot displays the VuFind user interface. At the top left is the VuFind logo with the tagline "Search. Discover. Share.". On the top right, there are links for "Your Account" and "Log Out", and a language dropdown menu set to "English". Below the header is a search bar with a dropdown menu set to "All Fields", a "Find" button, and a link to "Advanced" search. A breadcrumb trail shows "Home" > "Your Account" > "Checked Out Items". The main content area is titled "Your Checked Out Items" and lists two items. The first item is "Rigoletto /" by Verdi, Giuseppe, 1813-1901, a Musical Score, renewed once, with a due date of 2014-12-31 23:59:00.0. It has a red "Item Overdue" banner and a blue "renewable" banner. The second item is "AIDS : the burdens of history /", a Book, renewed once, with a due date of 2015-04-27 23:59:00.0, and a blue "renewable" banner. On the right side, there are two sections: "Your Account" with links for Favorites, Checked Out Items, Holds and Recalls, Fines, Profile, and Your Saved Searches; and "Your Lists" with links for Your Favorites and Create a List (+).



vufind
Search. Discover. Share.

[Your Account](#) | [Log Out](#)
Language: English

All Fields [Advanced](#)



[Home](#) > [Your Account](#) > Checked Out Items

Your Checked Out Items

 [Rigoletto /](#)
by: [Verdi, Giuseppe, 1813-1901.](#)
 **Musical Score**
Renewed: 1
Due Date: 2014-12-31 23:59:00.0

Item Overdue

renewable

 [AIDS : the burdens of history /](#)
 **Book**
Renewed: 1
Due Date: 2015-04-27 23:59:00.0

renewable

Your Account

- [Favorites](#)
- [Checked Out Items](#)
- [Holds and Recalls](#)
- [Fines](#)
- [Profile](#)
- [Your Saved Searches](#)

Your Lists

- [Your Favorites](#)
- [Create a List](#) (+)

What is Next for VALID OLE?

2015: Q1-Q2

- Install a test instance of OLE on Amazon Cloud
 - Solicit for testers from functional teams
 - Configure logins and provide access
- Load composite records from VuFind as the basis for OLE records
 - Integrate VuFind composite database with OLE
 - Activate “My Account” features e.g. self-service, holds and renewals

What is Next for VALID OLE?

2015: Q3 and Beyond

- Test OLE functionality with functional teams and committees. For example:
 - Work with Resource Sharing Committee to develop Universal Borrowing (UB) scenarios
 - Draft circulation rules to support UB
 - 16 weeks loan period
 - No recalls unless needed for reserves
 - Configure and thoroughly test the rules to insure it meets the needs of the participants

**Thank You
Questions ?**

