CORAL @ VCSU

Tuya Dutton

Electronic Resources Librarian

Allen Memorial Library, Valley City State University

701-845-7276   enkhtuya.battulga@vcsu.edu

2016 March

Life before CORAL

"You know, I'm gonna miss this when we go paperless."

The Team

- Lead and facilitator
    - Electronic Resources Librarian
- Technical Support
    - Web Developer at ITC
    - Library Systems Specialist
- User feedback
    - User Services Librarian
    - Electronic Resources Librarian
- Consultant – Library Director

Homework

Our Top ERM Requirements

- Must have capability to manage custom workflows and communications

- Must have capability to track renewals and cancellations

- Must have capability to upload files for licenses

- Must be interoperable

- Must allow export and import

- Must be easy to use and navigate (web based is preferred)

- Must have different levels of user permissions

- Must have the ability to store administrative information

Let's be Real

Image: http://library.artstor.org/library/secure/ViewImages?id=8CJGczI9NzldLS1WEDhzTnkrX3gseFl5eC0%3D

"CORAL is an Electronic Resources Management System consisting of interoperable modules designed around the core components of managing electronic resources.
It is made available as a free, open source program."
http://coral-erm.org/

Authentication
Organizations
Licenses
Resources
Management
Statistics

Developed by University of Notre Dame, Hesburgh Libraries, Indiana
http://library.nd.edu/

Implementation

- Phase I: Brainstorming

- Phase II: Configuring

- Phase III: Recording resources

Scope

- What is included?
  - Active databases, eJournal and eBooks first
  - Minimum entry with subject headings and descriptions
  - Free and discontinued resources
  - License expressions (selected)
- What is excluded?
  - PDA/DDA titles
  - Journal package titles and SFX holdings
  - Sushi configuration (usage statistics)

Authentication

CORAL Authentication

Please enter login credentials to sign in.

Login ID:
Password:

☐ Remember my

Login

Users

* Login ID must match the login ID set up in the modules

Login ID	Admin?		
~~benjami...~~	N	✏	✖
coral	Y	✏	✖
~~...~~	N	✏	✖
enkhtuya.battulga	Y	✏	✖

Organizations - Admin

CORAL Organizations

Home   New Organization   Admin

Add Users
Edit Value

- Organization Role
- Contact Role
- Alias Type
- External Login

Add New User

Login ID

First Name

Last Name

Privilege

Add New

add/edit
admin
view only

Organizations – Contact Hub

Organizations - Roles

Add New Organization

Name:

Parent:

Company URL: http://

Role(s): ☐ Consortium ☐ Library
☐ Platform ☐ Provider
☐ Publisher ☐ Vendor

Account Details:

Notes:

submit   cancel

Organizations – Parent

Organizations – Issues

Organizations – To License

Licensing

Licensing – Records & Naming

Licensing – Expression Comparison

Resources

- Workflow for Acquisitions
  - Cost history (added)
- Renewal alerts email
- More…

Resources – Workflow

Workflow Setup

Acquisition Type	Resource Format	Resource Type		
Trial	Database	any	✏️	✖️
Consortium-ODIN	Database	any	✏️	✖️
Direct Subscription	eJournals	any	✏️	✖️

User Group Setup

Group Name	Email Address	Users		
Access	@vcsu.edu	Enkhtuya Dutton	✏️	✖️
Acquisitions	@vcsu.edu	Enkhtuya Dutton	✏️	✖️
Collection Development	@vcsu.edu	Enkhtuya Dutton	✏️	✖️

Resources – Workflow Tasks

Renewal Alert - Email

CORAL Alert: Psychology Journal (ProQuest)

Library Coral Resources
Thursday, December 31, 2015 at 11:00 PM
To: Interlibrary loan;   Library Office

For resource: Psychology Journal (ProQuest) The subscription er
is approaching or passing. Visit the record at

Alert Settings

Email Address

csu.edu

@vcsu.edu

add email address

Days in advance of expiration

1

15

30

Resources - Other tabs

- Product – general information
- Acquisitions – budget and subscription
- Access – method and user limits
- Cataloging – record link
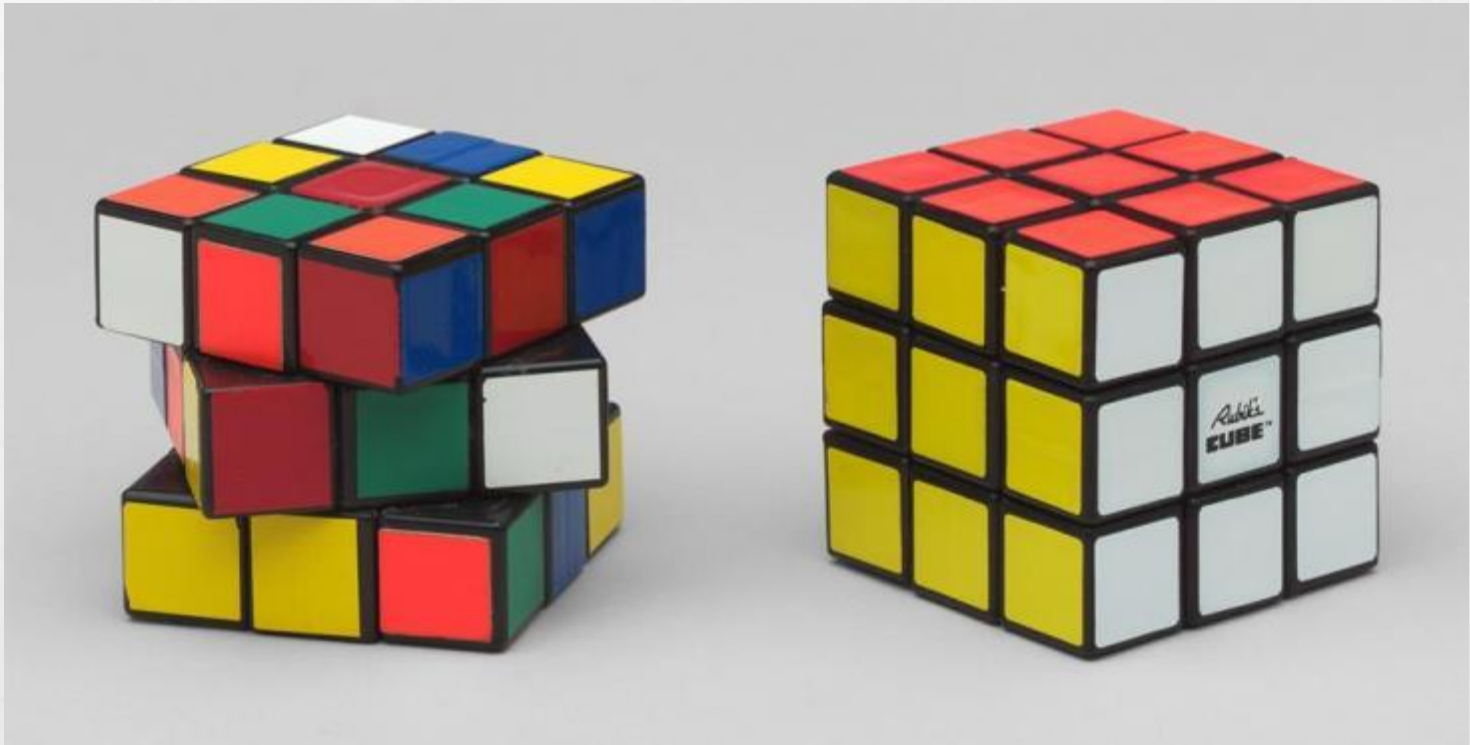- Contact – inherit from Organization or add direct
- Account - inherit from Organization or add direct
- Attachment – anything other than licenses and usage stats
- Routing – workflow configuration at work

Why CORAL?

Coral Community
Interested in getting involved?

Coral site http://coral-erm.org

Coral Steering Committee

    Meets every two months

    Listserv discussions

Coral Web Committee

    Meets every month

    How do we better organize Coral site?

    Coral Community input for better training and support

Listserv: CORAL-WEB@LISTSERV.ND.EDU

Coral GitHub

277 registered

129 in production*

(rough count from CORAL email list, 2015 September)

* - various levels of implementation and use

Related Readings

- Emery, Jill, & Stone, Graham. (2013). Techniques for electronic resource management. *Library Technology Reports, 49*(2), 1.

- Anderson, E. (2014). Chapter 4: Electronic resource management systems and related products. *50*(3), 30.

- Hosburgh, N. (2014, May 2). Managing the Electronic Resources Lifecycle: Creating a Comprehensive Checklist Using Techniques for Electronic Resources Management (TERMS). Retrieved from http://scholarship.rollins.edu/as_facpub/73/

- Shared ERM Requirement Project

- TERMS Wiki