

CORAL @ VCSU

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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



Image: <http://library.vcsu.edu:2224/library/secure/ViewImages?id=8D1Cd'TToMloyLyw4cDx3Qnkj&userId=hTNPfDAg&zoomparams=>

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?pid=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?		
koronika.guest	N		
coral	Y		
koronika	N		
enkhtuya.battulga	Y		

Organizations - Admin



The screenshot displays the 'CORAL Organizations' admin interface. At the top left is a logo of a green turtle. The main header contains the text 'CORAL Organizations'. Below the header is a navigation bar with three tabs: 'Home', 'New Organization', and 'Admin'. The 'Admin' tab is currently selected. The main content area is titled 'Add New User' and contains a form with the following fields:

- Login ID**: A text input field with a '9+' character count indicator.
- First Name**: A text input field with a person icon on the right.
- Last Name**: A text input field.
- Privilege**: A dropdown menu with a blue border and a downward arrow. The dropdown is open, showing three options: 'add/edit', 'admin', and 'view only'.

Below the form is a button labeled 'Add New'.

Add Users

Edit Value

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

Organizations – Contact Hub



CORAL Organizations

[Home](#) [New Organization](#) [Admin](#)

Search Displaying 1 to 1 of 1 Organization Records

[new search](#)

Name (contains)

Role

Contact Name (contains)

Starts with
[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#)
[O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

[new search](#)

Contact Name(s) ▲ ▼	Contact Role(s) ▲ ▼	Organization Name ▲ ▼
Jaye Hess	Marketing/Outreach Sales General	<u>EBSCO</u> host

Organizations - Roles

Add New Organization

Name:

Parent:

Company URL:

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

Account Details:

Notes:

submit

cancel

Organizations – Parent

CORAL Organizations Hello, Enkhtuya Dutton [logout](#)

[Home](#) [New Organization](#) [Admin](#) [Change Module](#) v

Search
new search
Name (contains)

Role

Contact Name (contains)

Starts with
ABCDEFGHIJKLMN
OPQRSTUVWXYZ
new search

Displaying 1 to 7 of 7 Organization Records

Organization Name	Alias	Parent Organization	Role(s)
OCLC			Provider
OCLC-EZProxy		OCLC	Provider
OCLC-FirstSearch Admin		OCLC	Platform
OCLC-WorldShare Interface		OCLC	Platform
OCLC-WorldCat Discovery website		OCLC	Platform
OCLC-Worldshare ILL module		OCLC	Platform
OCLC-WorldShare Metadata		OCLC	Platform

25 records per page



Organizations – Issues



CORAL Organizations

[Home](#) [New Organization](#) [Admin](#)

OCLC

Organization	Date Added	Issue Date	Notes
Aliases	10/07/2014	10/07/2014	There have been change to OCLC authorization accounts. The following accounts are deleted: [redacted] (old ILL account)  
Contacts			
Accounts			
Issues	10/07/2014	10/07/2014	Permissions for the following accounts have changed: [redacted]  
Licenses (0 records)			

[add new issue](#)

Organizations – To License



CORAL Organizations

Home

New Organization

Admin

OCLC-EZProxy

[Linked to License Module](#)

Organization

Aliases

Contacts

Accounts

Issues

Licenses

(1 record)

License

Consortium

Status

[OCLC - EZProxy License 2015](#)

[Editing Expressions](#)



CORAL Licensing

Home

New License

Licenses In Progress

Expression Comparison

Calendar

Admin

OCLC - EZProxy License 2015 [edit license](#) | [remove license](#)

[OCLC-EZProxy](#) [edit organization](#)

Documents

Expressions

Name

▲ ▼

Type

▲ ▼

Effective Date

▲ ▼

Signatures

EZProxy_OCLC_License_2015

Agreement

07/13/2015

(none found)

[add signatures](#)

Licensing

Home New License Licenses In Progress Expression Comparison Calendar Admin Change Module ▾

Search
new search

Name (contains)

Publisher/Provider

Consortium

Status

Document Type

Expression Type

Starts with
A B C D E F G H I J K L M N
O P Q R S T U V W X Y Z

new search

Displaying 1 to 25 of 33 License Records
<< 1 2 >>

Name ▲▼	Publisher / Provider ▲▼	Consortium ▲▼	Status ▲▼
ACLS Humanities Ebook	American Council of Learned Societies		Editing Expressions
ArtStor	ARTstor Inc		Editing Expressions
AudioBook Cloud			
Baker & Taylor			
Birds of North America			
Children's Literature Comprehensive Database			
Choice Review Online			
CQ Researcher			
Credo Reference			
Cross Cultural Considerations...			

License

License Name:

Publisher / Provider:

Consortium:

Licensing – Records & Naming

Wiley Online License [edit license](#) | [remove license](#)

John Wiley & Sons [edit organization](#)

[Documents](#)

[Expressions](#)

[Attachments](#)
(3 records)

Name ▲ ▼	Type ▲ ▼	Effective Date ▲ ▼
Wiley Online License 2014	Agreement	03/28/2014
Wiley Online License 2013	Agreement	03/10/2013
Wiley Online License 2012	Agreement	03/10/2012
Wiley Online License 2011	Agreement	03/10/2011

[upload new document](#)

Licensing – Expression Comparison



CORALLicensing

Hello, Enkhtuya Dutton
[logout](#)

[Home](#)

[New License](#)

[Licenses In Progress](#)

[Expression Comparison](#)

[Calendar](#)

[Admin](#)

[Change Module](#)



Limit by Expression Type:

Authorized Users/Campus Participants

BNA_CountersignedLicense2015

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Document Text:

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Cross Cultural Considerations... ebook

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Document Text:







Authorized Users are those persons affiliated with the Licensee who are permitted access to other electronic resources of the Licensee on site or via remote access. For example, they may be faculty, students, employees in addition to faculty, or consultants under contract with the Licensee. Walk-in users-meaning visitors to the Licensee's facility who do not have any official affiliation with the Licensee-may be considered Authorized Users only if they are physically present at the Licensee's site; they may not be granted remote access.

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	[redacted]@vcsu.edu	Enkhtuya Dutton [redacted]		
Acquisitions	[redacted]@vcsu.edu	Enkhtuya Dutton		
Collection Development	[redacted]@vcsu.edu	[redacted] Enkhtuya Dutton		

Resources – Workflow Tasks

Edit Workflow

Resource Entry Requirements

Acquisition Type:

Trial

Format:

Database

Type:

Workflow Steps

Name:

Approval/Notification Group:

Parent Step

Access

Add

↓	Record resource information	Acquisitions		×
↑ ↓	Record trial descriptions in Coral	Acquisitions		×
↑ ↓	Activate trial access on website	Access		×
↑ ↓	Add to A to Z list/ EZproxy	Access		×
↑ ↓	Verify on & off campus access	Access		×

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 expiration date is approaching or passing. Visit the record at

Alert Settings

Email Address

[redacted]@vcsu.edu

[redacted]@vcsu.edu

[add email address](#)

Days in advance of expiration

1

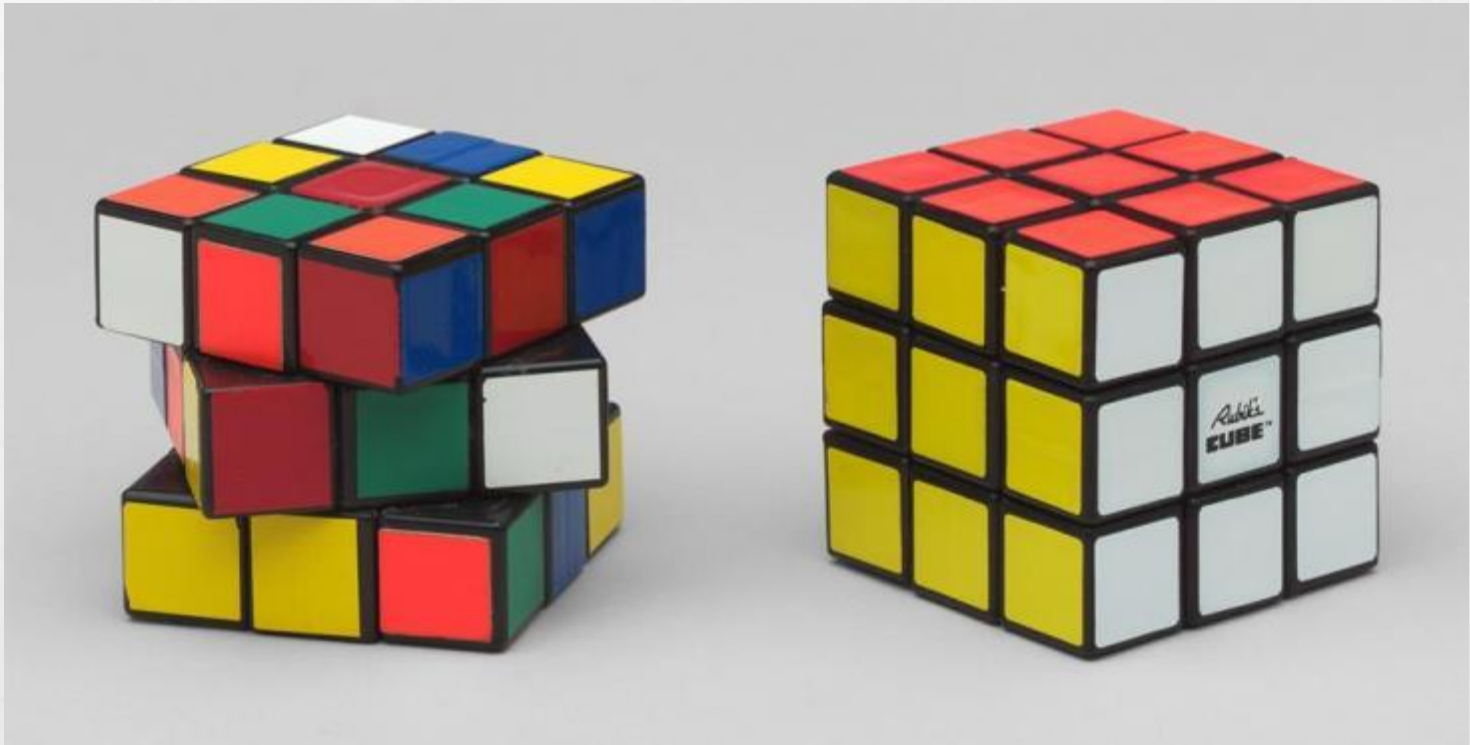
15

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](http://coral-erm.org)

277 registered

[Coral Steering Committee](#)

129 in production*

Meets every two months

(rough count from CORAL email list, 2015
September)

Listserv discussions

[Coral Web Committee](#)

* - various levels of implementation
and use

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](#)

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](#)