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
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=8CJGcz19NzldLS1WEDhzTnkrX3gseFl5eC0%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: [Field]
Password: [Field]

Remember my log in [Checkbox]

Login

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

<table>
<thead>
<tr>
<th>Login ID</th>
<th>Admin?</th>
</tr>
</thead>
<tbody>
<tr>
<td>username1</td>
<td>N</td>
</tr>
<tr>
<td>coral</td>
<td>Y</td>
</tr>
<tr>
<td>enkhtuya.battulga</td>
<td>Y</td>
</tr>
</tbody>
</table>

No changes have been made to the users.
Organizations - Admin

Add Users
Edit Value
• Organization Role
• Contact Role
• Alias Type
• External Login
Organizations – Contact Hub
Organizations - Roles

Add New Organization

Name: [field]
Parent: [field]
Company URL: [field]

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

Account Details: [field]
Notes: [field]

[submit] [cancel]
Organizations – Parent
Organizations – Issues
Organizations – To License
Licensing
Licensing – Records & Naming

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wiley Online License 2014</td>
<td>Agreement</td>
<td>03/28/2014</td>
</tr>
<tr>
<td>Wiley Online License 2013</td>
<td>Agreement</td>
<td>03/10/2013</td>
</tr>
<tr>
<td>Wiley Online License 2012</td>
<td>Agreement</td>
<td>03/10/2012</td>
</tr>
<tr>
<td>Wiley Online License 2011</td>
<td>Agreement</td>
<td>03/10/2011</td>
</tr>
</tbody>
</table>

upload new document
Automated Licensing – Expression Comparison

[Image of a web interface with options like Home, New License, Licenses In Progress, Expression Comparison, Calendar, Admin, Change Module, and a login prompt for Enkhtuya Dutton.

The interface includes sections for Limit by Expression Type, Authorized Users/Campus Participants, BNA_CountersignedLicense2015, and Cross Cultural Considerations... ebook.

BNA_CountersignedLicense2015
Document Text:
This License grants access solely to employees, faculty, staff, students and patrons officially affiliated with Licensee, as well as to both on-site and authenticated off-site users of Licensee’s library facilities (hereinafter, “Authorized Users”).

Cross Cultural Considerations... ebook
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

<table>
<thead>
<tr>
<th>Acquisition Type</th>
<th>Resource Format</th>
<th>Resource Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trial</td>
<td>Database</td>
<td>any</td>
</tr>
<tr>
<td>Consortium-ODIN</td>
<td>Database</td>
<td>any</td>
</tr>
<tr>
<td>Direct Subscription</td>
<td>eJournals</td>
<td>any</td>
</tr>
</tbody>
</table>

User Group Setup

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Email Address</th>
<th>Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access</td>
<td>@vcsu.edu</td>
<td>Enkhtuya Dutton</td>
</tr>
<tr>
<td>Acquisitions</td>
<td>@vcsu.edu</td>
<td>Enkhtuya Dutton</td>
</tr>
<tr>
<td>Collection Development</td>
<td>@vcsu.edu</td>
<td>Enkhtuya Dutton</td>
</tr>
</tbody>
</table>
Resources – Workflow Tasks

Edit Workflow

Resource Entry Requirements

- Acquisition Type: Trial
- Format: Database
- Type: 

Workflow Steps

- Name: 
- Approval/Notification Group: Access
- Parent Step: 

<table>
<thead>
<tr>
<th>Task</th>
<th>Approval Group</th>
<th>Parent Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record resource information</td>
<td>Acquisitions</td>
<td></td>
</tr>
<tr>
<td>Record trial descriptions in Coral</td>
<td>Acquisitions</td>
<td></td>
</tr>
<tr>
<td>Activate trial access on website</td>
<td>Access</td>
<td></td>
</tr>
<tr>
<td>Add to A to Z list/ EZproxy</td>
<td>Access</td>
<td></td>
</tr>
<tr>
<td>Verify on &amp; off campus access</td>
<td>Access</td>
<td></td>
</tr>
</tbody>
</table>
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 expires is approaching or passing. Visit the record at

csu.edu

Alert Settings

Email Address
vcu.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

- [Shared ERM Requirement Project](http://scholarship.rollins.edu/as_facpub/73/)
- [TERMS Wiki](http://scholarship.rollins.edu/as_facpub/73/)