CORAL 101: AN INTRODUCTION TO IMPLEMENTING AND NAVIGATING CORAL

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What is CORAL

• Open Source Electronic Resources Management System
• Developed by Hesburgh Libraries at the University of Notre Dame
• Comprised of 5 interoperable modules:
  • Resources
  • Organizations
  • Licensing
  • Statistics
  • Management
How CORAL Helps Manage Resources

- Manage/Track subscriptions
- Manage vendors
- Store Documents/Licenses
Quick Guide to Installation

• You’ll need
  • a server for web applications (Apache)
  • PHP 5.5 or above
  • Required PHP extensions: gettext, mbstring, and mysqli
  • MySQL 5.5 or above

• Or find a person! (central IT)
Quick Guide to Installation

2. Unzip and copy to web server’s HTML folder
3. Open the file path in a web browser to open the screen shown here
4. Follow the screens & refer to the docs: http://docs.coral-erm.org/en/latest/install.html
Quick Guide to Installation

- Other information you’ll need:
  - Primary system administrator
  - LDAP?
  - Managing licensing terms in CORAL? (Terms Tool)
  - Link resolver integration? Base URL?
  - Currency preference
  - Catalog integration? Catalog URL
  - General contact email for support
  - Install all modules or just some?
5 interoperable modules

1. Resources
2. Organizations
3. Licensing
4. Statistics
5. Management
1. Resources Module

- Acquisitions
- Access
- Cataloging
- Contacts
- Accounts
- Issues
- Attachments
- Workflows
Resources
2. Organizations Module - what you can do

- Store vendor administrative credential and logins
- Store vendor contact information
- Track Issues
Organizations Module
3. Licensing Module - what you can do

- Store Licenses
- Add expressions for resources
Licensing Module
4. Usage Statistics - what you can do

- Import COUNTER reports
- Set up SUSHI importing
- Store non-standard reports alongside SUSHI statistics
# Usage Statistics

## Displaying 1 to 35 of 30 Platform Records

<table>
<thead>
<tr>
<th>Platform Name</th>
<th>Publisher</th>
<th>Last Run</th>
<th>Status</th>
<th>By</th>
</tr>
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<td>(name found)</td>
<td>12/31/1969</td>
<td>CRMRN</td>
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<td>CRMRN</td>
<td></td>
</tr>
</tbody>
</table>
5. Management Module
Workflows Examples

- New resource acquisition
- One time purchases
- Trials
- E-book purchases
CORAL WORKFLOWS

• Can be setup for any resource type and format type
• Create steps
• Emails staff member(s) of step that needs to be completed
• Workflow step is marked completed in CORAL.
New Materials Workflow Steps Example

- Propose new purchase
- Licensing Review
- Pay Invoice and Setup Access
- Cataloguing
- Access Notification
- Resource Planning
- Update Faculty
New Materials Workflow

- Electronic Resources Review Committee (ERRC)
- Starts with selection
- Requests come from liaisons and faculty to this group
- Evaluate based on predetermined criteria
New Materials Workflow
New Materials Workflow

• Department Head
• Negotiates with vendor
• loops in relevant staff
• Handles any licenses
• Gets director approval
• Forwards setup emails to e-resources librarian
New Materials Workflow
New Materials Workflow

- Business Manager pay invoices
- attaches orders in CORAL
- active CORAL user
- E-resources Librarian sets up access alongside Business Manager
# New Materials Workflow

## Workflow Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Group</th>
<th>Start Date</th>
<th>Complete</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current workflow</td>
<td>ERM</td>
<td>08/31/2018</td>
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<tr>
<td>Pay Invoice and Setup Access</td>
<td>E-Resources</td>
<td>08/31/2018</td>
<td>mark complete</td>
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</tr>
<tr>
<td>Cataloging</td>
<td>E-Resources</td>
<td>08/31/2018</td>
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</tr>
<tr>
<td>Licensing</td>
<td>E-Resources</td>
<td>08/31/2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access Notification</td>
<td>General Campus</td>
<td>08/31/2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource Planning</td>
<td>General Campus</td>
<td>08/31/2018</td>
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<td></td>
</tr>
<tr>
<td>Update Faculty per their Request</td>
<td>E-Resources</td>
<td>08/31/2018</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Resource Entry Requirements

- **Acquisition Type**: New
- **Format**: Electronic
- **Type**: Ongoing Subj

## Workflow Steps Details

- **Propose New Purchase**: ERM
- **Licensing**: E-Resources
- **Access Notification**: E-Resources
- **Resource Planning**: E-Resources
- **Update Faculty per their Request**: General Campus

**Workflow Steps**:
- **Propose New Purchase**: ERM
- **License**: E-Resources
- **Access Notification**: E-Resources
- **Resource Planning**: E-Resources
- **Update Faculty per their Request**: General Campus
New Materials Workflow

• Cataloger help
• works with e-resources to identify best source for MARC records
• e-resources notes decision in CORAL
New Materials Workflow
New Materials Workflow

• Back to ERRC to notify of access
• Notifies Reference librarians to promote and add to public-facing lists
New Materials Workflow

[Diagram showing workflow steps and access notification]
New Materials Workflow

• Public Services get to know the resource
• Add it to necessary public-facing elements (A-Z databases, Libguides)
• Notify relevant users on campus
• Use CORAL to find and update details
New Materials Workflow
New Materials Workflow

- General campus notification
- Use CORAL to trigger announcements
- Shows the completion of workflow
New Materials Workflow

Add User Group

User Group

Group Name: General Campus

Email Address: faculty@pineuniversit

Assigned Users

Submit  Cancel
For More Info

- Website: [http://coral-erm.org/](http://coral-erm.org/)
  - About the project and governance
  - Download links
  - User Map

- Live Demo:
  - available to all
  - [https://coraldemo.library.tamu.edu/](https://coraldemo.library.tamu.edu/)
Resources for Learning

More about CORAL

- Github
  - Community
  - Governance Meeting Minutes
    - Steering Committee
    - Web Committee

- Documentation
  - Github
  - [http://docs.coral-erm.org/](http://docs.coral-erm.org/)
Resources for Learning More about CORAL

• Keeping up
  • THE REEF Newsletter
    • seasonal
    • upcoming presentations, release information, CORAL user profiles
  • User mailing list
    • more active community email list
    • links on website
• Social media
  • Twitter: @coral_erm
  • Facebook: www.facebook.com/coralerm
  • Youtube channel: coming soon!!!
Questions?