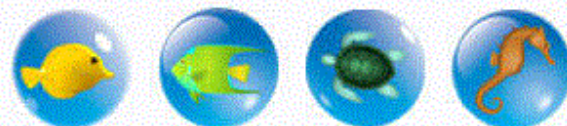


UMassAmherstLibraries

CORAL Workflows for New Acquisitions and Renewals

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ALA Midwinter – Boston
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About CORAL

Centralized Online Resources Acquisitions and Licensing

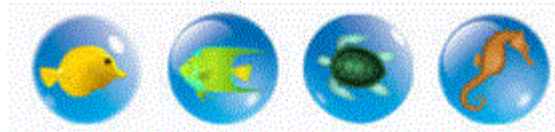
CORAL is an electronic resource management system built by the University of Notre Dame's Hesburgh Libraries. The first module, Licensing, was released as open source software in the summer of 2010 and we have continued releasing new modules since then. It is designed to be both simple and highly customizable – each module can be installed independently or used together depending on your library's needs. If you do decide to install the entire suite, easy access to linked records help make sense of the electronic resource through the entire life cycle:

[Acquisition](#) > [Licensing](#) > [Administration](#) > [Support](#) > [Usage](#)

CORAL runs on PHP 5, MySQL 5 and your webserver. It is a very small installation and most users (including Notre Dame) have it installed on a server alongside other production applications. CORAL is released as open source software under GPL v. 3 and is available on GitHub. While we are quite happy with the CORAL product for ourselves, we are always open to project contributors. If you have a great idea for CORAL please post it in the forum – we would love to hear about it!



Rationale for Adoption




- Integrated modules for organizations, resources, licenses and usage data
- Centralized repository for interrelated data previously distributed...widely among files, platforms
- Focus here on workflows in Resources module, not entire e-resources management system

Why Workflows?

- Opaque, disjointed processes for acquiring and renewing resources
- Scattered responsibilities for tasks among acquisitions staff
- Timely access to new resources provided inconsistently
- Needed better support for renewal decisions

How Workflows Work

 **CORAL Resources**

HomeNew ResourceMy QueueImportAdmin

Administration

Users

Workflow / User Group

Access Method

Account Type

Acquisition Type

Administering Site

Alert Settings

Alias Type

Attachment Type

Authentication Type

Authorized Site

Cataloging Status

CatalogingType

Contact Role

Cost Details

Currency

License Status

Note Type

Order Type

Purchasing Site

Resource Format









































Resource Type

Storage Location

Subjects

User Limit

Workflow Setup

Acquisition Type	Resource Format	Resource Type		
Purchase	Electronic	database		
Renewal	Electronic	database		
Purchase	Electronic	ejournal package		
Renewal	Electronic	ejournal package		
Purchase	Electronic	ebook package		
Renewal	Electronic	ebook package		
Purchase	Electronic	image		
Renewal	Electronic	image		
Purchase	Electronic	streaming file		
Renewal	Electronic	streaming file		
Membership	Electronic	database		
Membership	Electronic	any		
Membership	Electronic	ejournal package		
Multi-year renewal, payment only	Electronic	any		
Access Fee	Electronic	any		
Multi-year renewal, payment only	Electronic	ejournal package		
Renewal	Electronic	ebook		
Purchase	Electronic	ebook		
Renewal	Electronic	tool		
Trial	Electronic	any		

[add workflow](#)

Database Purchase

 **CORAL Resources**

Hello, Christine Turner
[logout](#)

Home New Resource My Queue Import Admin

Change Module v

Library of Latin Texts Complete

 Product

 Acquisitions

 Access

 Cataloging

 Contacts

 Accounts

 Attachments
(0 records)


 **Routing**

Step	Group	Start Date	Complete
Funding Approval	Scott	09/25/2015	10/06/2015 by Christine Turner
Licensing	Christine	09/25/2015	10/06/2015 by Christine Turner
Add bib/order records	Christine	10/06/2015	10/06/2015 by Christine Turner
Place order	Christine	10/06/2015	10/06/2015 by Christine Turner
Invoice payment	Heather	10/06/2015	11/24/2015 by Heather Deirdre
Access notification received	Christine	10/06/2015	mark complete
Activation - EZProxy	Christine		
Activation - SFX	Catherine		
Activation - catalog	Christine		
MARC record review	Marcelle		
Activation - WCL KB	Ron		
Activation - website/Collections & DBs	Christine		
Add MARC records for database titles	Christine		
Notification - selectors	Christine		
Notification - social media	Christine		
Acquisition type change, if needed	Christine		

 [restart workflow](#)

 [mark entire workflow complete](#)

E-Journal Package Renewal









**CORAL Resources**

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[logout](#)


HomeNew ResourceMy QueueImportAdmin


Change Module v

IOPScience Extra


 Product	Step	Group	Start Date	Complete
 Acquisitions	Locate usage statistics	Nancy	09/17/2015	09/28/2015 by Nancy Washburn
 Access	Send price, usage to selector w/6% > if firm price N/A	Nancy	09/17/2015	09/28/2015 by Nancy Washburn
 Cataloging	Renewal price requested	Heather	09/17/2015	09/24/2015 by Heather Deirdre
 Contacts	Renewal price received	Heather	09/17/2015	09/24/2015 by Heather Deirdre
 Accounts	Title list download & review for changes	Christine	09/24/2015	10/08/2015 by Christine Turner
 Attachments (2 records)	Licensing	Christine	09/24/2015	10/07/2015 by Christine Turner
 Routing	Renewal confirmation	Heather	10/08/2015	10/08/2015 by Christine Turner
	Invoice Payment	Heather	10/08/2015	10/30/2015 by Heather Deirdre
	Activation review - SFX	Catherine	10/08/2015	mark complete

Workflow restarted on 09/17/2015 by Christine Turner

 [restart workflow](#)

 [mark entire workflow complete](#)

Multi-year Renewal, Payment Only


**CORAL Resources**


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[logout](#)


HomeNew ResourceMy QueueImportAdmin


Change Module v


Arts premium package


 Product


 Acquisitions


 Access

 Cataloging

 Contacts


 Accounts

 Attachments
(0 records)

 Routing

Step	Group	Start Date	Complete
Invoice payment	Heather	09/01/2015	10/13/2015 by Heather Deirdre
Locate usage statistics	Nancy	09/01/2015	10/14/2015 by Nancy Washburn
Change acquisition type to renewal if necessary	Christine	10/13/2015	10/16/2015 by Christine Turner

Workflow restarted on 09/01/2015 by Christine Turner

 [restart workflow](#)

Degree of Difficulty

- Cost – free = easy
- Technical - ?
 - Reportedly easy, good support network
 - Our guy is good (and very pleasant)
- Personnel
 - Conceptual challenges
 - Customizing processes
 - Practical approaches

Meeting Our Needs?

- as a central repository for data – YES
- to make transparent workflows that trigger task for responsible staff in timely manner - Mostly.
- as tool to support renewal decisions...To a point, but we need more data and awareness (adoption)
- Still a work in progress. Next up: individual e-journal subscriptions