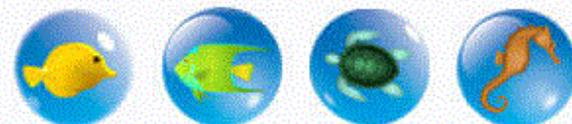


UMass **Amherst** Libraries

CORAL Workflows for New Acquisitions and Renewals

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About CORAL

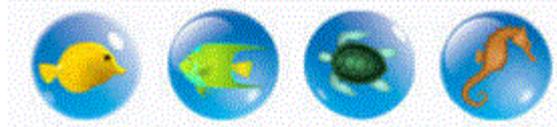
Centralized Online Resources Acquisitions and Licensing

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**

Home New Resource My Queue Import Admin

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 ▾

Library of Latin Texts Complete

| Product | Step | Group | Start Date | Complete |
|-------------------------|---|-----------|------------|--------------------------------|
| Acquisitions | Funding Approval | Scott | 09/25/2015 | 10/06/2015 by Christine Turner |
| Access | Licensing | Christine | 09/25/2015 | 10/06/2015 by Christine Turner |
| Cataloging | Add bib/order records | Christine | 10/06/2015 | 10/06/2015 by Christine Turner |
| Contacts | Place order | Christine | 10/06/2015 | 10/06/2015 by Christine Turner |
| Accounts | Invoice payment | Heather | 10/06/2015 | 11/24/2015 by Heather Deirdre |
| Attachments (0 records) | Access notification received | Christine | 10/06/2015 | mark complete |
| Routing | 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 Hello, Christine Turner [logout](#)

Home New Resource My Queue Import Admin Change Module ▾

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 |
| Cataloging | Renewal price received | Heather | 09/17/2015 | 09/24/2015 by Heather Deirdre |
| Contacts | Title list download & review for changes | Christine | 09/24/2015 | 10/08/2015 by Christine Turner |
| Accounts | Licensing | Christine | 09/24/2015 | 10/07/2015 by Christine Turner |
| Attachments (2 records) | Renewal confirmation | Heather | 10/08/2015 | 10/08/2015 by Christine Turner |
| Attachments (2 records) | Invoice Payment | Heather | 10/08/2015 | 10/30/2015 by Heather Deirdre |
| Routing | 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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Home New Resource My Queue Import Admin Change Module v

Arts premium package

| Product | Step | Group | Start Date | Complete |
|--------------|---|-----------|------------|--------------------------------|
| Acquisitions | Invoice payment | Heather | 09/01/2015 | 10/13/2015 by Heather Deirdre |
| Access | Locate usage statistics | Nancy | 09/01/2015 | 10/14/2015 by Nancy Washburn |
| Cataloging | 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](#)

- Product
- Acquisitions
- Access
- Cataloging
- Contacts
- Accounts
- Attachments (0 records)
- Routing

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