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CORAL: Implementing an Open Source ERM

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CORAL: Implementing an Open Source ERM

NASIG 2012

Andrea Imre, Southern Illinois University Carbondale

CORAL : Centralized Online Resource Acquisitions and Licensing

- Developed at the University of Notre Dame's Hesburgh Libraries
- 1st module released in the Summer of 2010
- 4 modules:
 - Resources
 - Licensing
 - Organizations
 - Usage Statistics
- More info with technical documentation, download instructions, forum, listserv info at <http://erm.library.nd.edu/>

SIUC background

Budget:

- Materials budget: \$5.6 million (FY11)
- Electronic resource expenditure: \$4 million (FY11)

Staff with responsibilities for e-resources:

- Electronic Resources Librarian (ERL)
- 3 Collection Development Librarians
- 1 Acquisition staff
- 1 Accounting staff

E-resource management prior to CORAL

Commercial products:

- Voyager
- SFX (linkresolver, A-Z journal list, MARCIt, UStats)
- EBSCONET
- Libguides (databases A-Z and subject guides)

Other Tools:

- Excel files
- E-mail
- Personal folders on computers
- Networked shared folders
- File cabinets

What we needed

- Checking status of new orders (licensing, ordering, payment, access)
- Eliminating potential gaps in workflow
- Centralized database for vendor info
- Centralized database for licenses
- Web interface
- Easy tool to use

Why CORAL?

- Limited resources dedicated for ERM implementation
 - Cost of a commercial ERM
 - Staff
- Modular infrastructure allows phased-in implementation
- Web interface
- Workflow management

Process

- Installed all modules: October 2011
- Licensing module
 - Scanned in all paper licenses
 - Uploaded all digital licenses
- Resources module
 - Resource records for existing licenses
 - New orders entered by collection development librarians after demo in March
 - Records as renewals come up
- Organizations module
 - Added related organization info for existing licenses and resources



Where we are now...

Licenses



CORALicensing

Hello, Andrea Imr

[Home](#) [New License](#) [Licenses In Progress](#) [Expression Comparison](#) [Admin](#)

[Change Module](#)

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

License Status

Wiley [edit organization](#)

Documents

Expressions

Terms Tool

Attachments (0 records)

| Name ▲▼ | Type ▲▼ | Effective Date ▲▼ | Signatures ▲▼ | | |
|---|-------------------------|-------------------|--|-------------------------------|--|
| Wiley 2012 Amendment | Amendment | 01/01/2012 | (none found) add signatures | view document | edit document remove document |
| Wiley Journal backfiles, Appendix C | Amendment | 05/04/2011 | (none found) add signatures | view document | edit document remove document |
| Wiley Amendment Encyclopedia of Life Sciences | Countersigned Agreement | 05/03/2011 | (none found) add signatures | view document | edit document remove document |
| Wiley 2011 Amendment | Agreement | 01/01/2011 | (none found) add signatures | view document | edit document remove document |
| Wiley 2010 | Agreement | 01/01/2010 | (none found) add signatures | view document | edit document remove document |
| Wiley 2005-2007 | Agreement | 01/01/2005 | (none found) add signatures | view document | edit document remove document |
| Polymer backfile Amendment | Amendment | 04/17/2003 | (none found) add signatures | view document | edit document remove document |

[upload new document](#)

Resources

Hello, A



CORAL Resources

[Home](#) [New Resource](#) [My Queue](#) [Admin](#)

[Change Mo](#)

County and Regional Histories, Illinois

Product

Acquisitions

Access

Cataloging

Contacts

Accounts

Attachments
(0 records)

Routing

County and Regional Histories, Illinois Paid direct Electronic

Other

| | |
|----------------|---|
| Record ID: | 96 |
| Status: | In Progress |
| Created: | 04/30/2012 by Jeanne Cross |
| Last Update: | 06/04/2012 by Andrea Imre |
| Organizations: | Publisher: Gale |
| Resource URL: | http://go.galegroup.com/gdsc/i.do?id=4LKQ&v=2.1&u=siuc_main&it=aboutCollections&p=GDSC&sw=w |
| Description: | 1852-1921 First compiled and produced by publishers and subscriptions agents for area residents and patrons, these original histories represent difficult-to-find materials. Included in this collection of 361 titles are tables and lists of vital statistics, military service records, municipal and county officers, chronologies, portraits of individuals and views of urban and rural life not found anywhere else. The atlases provide additional information on land use and settlement patterns and scarce early town and city plans. |

[edit product details](#)

Additional Notes [add new note](#)

General Note
 Gale Archives Unbound platform
04/30/2012 by Andrea Imre

Helpful Links

[Print View](#)

Organizations Module
[Gale](#)

Licensing Module
[Sabin Digital Archive Collection](#)

[Send feedback on this resource](#)

Workflow Management

 **CORAL Resources** Hello, Andrea Imre

Home | New Resource | My Queue | Admin Change Module v

County and Regional Histories, Illinois

| Product | Step | Group | Start Date | Complete |
|----------------------------|---|--------|------------|-------------------------------|
| Acquisitions | Request Verification | Staci | 04/30/2012 | 05/08/2012 by Andrea Imre |
| Access | Licensing Paperwork | Andrea | 05/08/2012 | 05/08/2012 by Andrea Imre |
| Cataloging | License to Legal | Andrea | 05/08/2012 | 05/08/2012 by Andrea Imre |
| Contacts | License to Purchasing | Andrea | 05/08/2012 | 05/08/2012 by Andrea Imre |
| Accounts | License to publisher | Andrea | 05/08/2012 | 05/08/2012 by Andrea Imre |
| Attachments (0 records) | Set up PO in Voyager | Kym | 05/08/2012 | 05/08/2012 by Andrea Imre |
| Routing | Request invoice from pub and forward to Staci | CDLs | 05/08/2012 | 06/04/2012 by Jeanne Cross |
| | Pay invoice | Staci | 06/04/2012 | 06/04/2012 by Staci Batteau |
| | Activation | Andrea | 06/04/2012 | 06/05/2012 by Andrea Imre |
| | Voyager bib | Andrea | 06/05/2012 | 06/05/2012 by Andrea Imre |
| | Announce | CDLs | 06/05/2012 | mark complete |

 [restart workflow](#)
 [mark entire workflow complete](#)



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

Currency

License Status

Note Type

Order Type

Purchasing Site

Resource Format

Resource Type

Workflow Setup

| Acquisition Type | Resource Format | Resource Type | | |
|--------------------|--------------------|---------------|--|--|
| Paid direct | Electronic | any | | |
| Free | Electronic | any | | |
| Trial | Electronic | any | | |
| Paid via consortia | Electronic | any | | |
| Paid via EBSCO | Print + Electronic | any | | |

[add workflow](#)

User Group Setup

| Group Name | Email Address | Users | | |
|------------|----------------------|--|--|--|
| Andrea | aimre@lib.siu.edu | Andrea Imre | | |
| CDLs | cdl@lib.siu.edu | Jeanne Cross Roger Cross Jonathan Nabe | | |
| Kym | kmills@lib.siu.edu | Kym Mills | | |
| Staci | sbatteau@lib.siu.edu | Staci Batteau | | |

[add user group](#)

Administration

- Users
- Workflow
- Access I
- Account
- Acquisiti
- Administ
- Alert Set
- Alias Typ
- Attachm
- Authentic
- Authoriz
- Catalogir
- Catalogir
- Contact I
- Currency
- License :
- Note Typ
- Order Ty
- Purchasi
- Resourc
- Resourc
- Storage I
- User Lim

Acquisition Type: Format: Type:

Workflow Steps

| | Name: | Approval/Notification Group: | Parent Step | |
|-----|--|-------------------------------------|---|------------------------------------|
| | <input type="text"/> | <input type="text" value="Andrea"/> | <input type="text"/> | <input type="button" value="Add"/> |
| ↓ | <input type="text" value="Request Verification"/> | <input type="text" value="Staci"/> | <input type="text"/> | ✗ |
| ↑ ↓ | <input type="text" value="Licensing Paperwork"/> | <input type="text" value="Andrea"/> | <input type="text" value="Request Verification"/> | ✗ |
| ↑ ↓ | <input type="text" value="License to Legal"/> | <input type="text" value="Andrea"/> | <input type="text" value="Licensing Paperwork"/> | ✗ |
| ↑ ↓ | <input type="text" value="License to Purchasing"/> | <input type="text" value="Andrea"/> | <input type="text" value="License to Legal"/> | ✗ |
| ↑ ↓ | <input type="text" value="License to publisher"/> | <input type="text" value="Andrea"/> | <input type="text" value="License to Purchasing"/> | ✗ |
| ↑ ↓ | <input type="text" value="Verify PO approval"/> | <input type="text" value="Staci"/> | <input type="text" value="License to publisher"/> | ✗ |
| ↑ ↓ | <input type="text" value="Set up PO in Voyager"/> | <input type="text" value="Kym"/> | <input type="text" value="Verify PO approval"/> | ✗ |
| ↑ ↓ | <input type="text" value="Request invoice from pub and forward to"/> | <input type="text" value="CDLs"/> | <input type="text" value="Set up PO in Voyager"/> | ✗ |
| ↑ ↓ | <input type="text" value="Pay invoice"/> | <input type="text" value="Staci"/> | <input type="text" value="Request invoice from pub"/> | ✗ |
| ↑ ↓ | <input type="text" value="Activation"/> | <input type="text" value="Andrea"/> | <input type="text" value="Pay invoice"/> | ✗ |
| ↑ ↓ | <input type="text" value="Voyager bib"/> | <input type="text" value="Andrea"/> | <input type="text" value="Activation"/> | ✗ |
| ↑ | <input type="text" value="Announce"/> | <input type="text" value="CDLs"/> | <input type="text" value="Voyager bib"/> | ✗ |

Pros

- No annual fees/or subscription fees
- Easy installation
- Meets my library's needs
 - Centralized storage for e-resources contact information
 - Organized license information
 - Workflow management
 - Simple interface

Challenges

- It's not a replacement of existing tools
- Staff buy-in
- Limited staff / time dedicated for implementation
- Manual data entry
- Duplicate data entry
- No customer service
- Rely on library systems staff and on listserv feedback for technical problems

Future plans

- Establish workflow routines for renewals
- Share licensing data with staff/patrons via SFX
- Continue populating licensing, resources, and organizations modules

Contact

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