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# The Future is Flexible, Extensible, and Community Based: Stories of Successful Electronic Resources Management - CORAL ERM at Southern Illinois University Carbondale

Andrea Imre

*Southern Illinois University Carbondale, [aimre@lib.siu.edu](mailto:aimre@lib.siu.edu)*

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# The future is flexible, extensible, and community-based: stories of successful electronic resources management

CORAL ERM AT SOUTHERN ILLINOIS UNIVERSITY CARBONDALE

ANDREA IMRE

NASIG 30TH ANNUAL CONFERENCE

MAY 29, 2015

WASHINGTON D.C.

# SIUC – Morris Library

- ▶ Materials budget : \$5.6 Million (FY14)
- ▶ E-resources = 90%
- ▶ E-resources workflow:
  - ▶ Within the Library: 4 library staff
  - ▶ Outside the Library: Legal Counsel, Purchasing, and Vendor

# Our CORAL history

- ▶ Initial CORAL installation in 2011 October with 3 modules:
  - ▶ Resources
  - ▶ Organizations
  - ▶ Licensing
  
- ▶ Spring 2013: Usage Statistics Module
  - ▶ Journal cancellation project in 2013

















# Workflow - Resources module

- ▶ Flexible workflow feature

**Administration**

- Users
- Workflow / User Group**
- Access Method
- Account Type
- Acquisition Type
- Administering Site
- Alert Settings
- Alias Type
- Attachment Type
- Authentication Type
- Authorized Site

**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		
Paid via EBSCO	Electronic	any		
CANCELLED	Print + Electronic	any		

[add workflow](#)

Acquisition Type:

Paid direct

Format:

Electronic

Type:

### Workflow Steps

Name:

Approval/Notification Group:

Parent Step

Andrea

Add

↓	Setting up PO	Staci		×
↑ ↓	Licensing Paperwork	Andrea	Setting up PO	×
↑ ↓	License to Legal	Andrea	Licensing Paperwork	×
↑ ↓	License to Purchasing	Andrea	License to Legal	×
↑ ↓	License to publisher	Andrea	License to Purchasing	×
↑ ↓	Verify PO approval	Staci	License to publisher	×
↑ ↓	Set up PO in Voyager	Kym	Verify PO approval	×
↑ ↓	Request invoice from pub and forward to	CDLs	Set up PO in Voyager	×
↑ ↓	Pay invoice	Staci	Request invoice from pub	×
↑ ↓	Activation	Andrea	Pay invoice	×
↑ ↓	Voyager bib	Andrea	Activation	×
↑	Announce	CDLs	Voyager bib	×

## Web of Science (Social Sciences) backfiles

Product

Acquisitions

Access

Cataloging

Contacts

Accounts

Attachments  
(0 records)

Routing

### Web of Science (Social Sciences) backfiles Paid direct

Electronic Backfile

Record ID: 275

Status: In Progress

Created: 09/19/2014 by Jonathan Nabe

Organizations: Provider: Thomson Reuters

Description: SSCI, 1900-1955

[edit product details](#)

[add new subject](#)

#### Additional Notes [add new note](#)

Acquisition Details FC SSGN  
09/19/2014 by Jonathan Nabe

## Web of Science (Social Sciences) backfiles

Product

Acquisitions

Access

Cataloging

Contacts

Accounts

Attachments  
(0 records)

Routing

Step	Group	Start Date	Complete
Setting up PO	Staci	09/19/2014	10/02/2014 by Staci Batteau
Licensing Paperwork	Andrea	10/02/2014	10/09/2014 by Andrea Imre
License to Legal	Andrea	10/09/2014	10/09/2014 by Andrea Imre
License to Purchasing	Andrea	10/09/2014	10/09/2014 by Andrea Imre
License to publisher	Andrea	10/09/2014	10/09/2014 by Andrea Imre
Verify PO approval	Staci	10/09/2014	10/10/2014 by Staci Batteau
Set up PO in Voyager	Kym	10/10/2014	10/10/2014 by Kym Mills
Request invoice from pub and forward to Staci	CDLs	10/10/2014	10/17/2014 by Jonathan Nabe
Pay invoice	Staci	10/17/2014	10/17/2014 by Staci Batteau
Activation	Andrea	10/17/2014	<a href="#">mark complete</a>
Voyager bib	Andrea		
Announce	CDLs		

[restart workflow](#)

[mark entire workflow complete](#)

# Tracking license status in Resources module

The screenshot displays a software interface with a sidebar on the left and a main content area on the right. The sidebar contains several menu items: Product, Acquisitions, Access, Cataloging, Contacts, Accounts, Attachments (1 records), and Routing. The main content area is divided into three sections: Order, License, and Additional Notes.

**Order**

Acquisition Type:	Paid direct
Order Number:	C60570

**Initial Cost**

CSSMED	USD	Ongoing
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[edit acquisitions information](#)

**License**

Status: Purchasing Signature on 09/26/2013 by Andrea Imre  
Legal Counsel Review on 09/26/2013 by Andrea Imre  
ERL Review on 09/26/2013 by Andrea Imre  
Legal Counsel Review on 09/19/2013 by Andrea Imre

Licenses: New England Journal of Medicine

[edit license and status](#)

**Additional Notes** [add new note](#)

Licensing Details	Asking legal about 12.c (9/19/13) 09/19/2013 by Andrea Imre
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# Workflow - Organizations module

- ▶ Essential for daily ERL work
  - ▶ Currently used for 138 organizations



The screenshot displays the CORAL Organizations module interface. At the top, there is a logo of a green turtle and the title "CORAL Organizations". Below the title, there are navigation tabs for "Home", "New Organization", and "Admin". The main content area shows the details for the "American Chemical Society" organization, with a link to "remove organization".

Organization	American Chemical Society
<a href="#">Aliases</a>	Company URL: <a href="http://portal.acs.org/portal/acs/corg/content">http://portal.acs.org/portal/acs/corg/content</a>
<a href="#">Contacts</a>	Role(s): <b>Provider, Publisher</b>
<a href="#">Accounts</a>	<a href="#">edit organization details</a>
<a href="#">Issues</a>	Created: 10/06/2011 by system Last Update: 06/22/2012 by Andrea Imre
<a href="#">Licenses</a> (1 record)	

# Usage statistics module

- ▶ Version 1.1 (Fall 2013)
  - ▶ SUSHI
  - ▶ Supports COUNTER R3 and R4
  - ▶ JR1, JR1α, BR1, BR2, DB1

**CORAL Usage Statistics**

Home File Import SUSHI Admin Report Options Usage Reports

### Usage Statistics Import

File:  No file selected.

**Layout:**

- Journals (JR1) R3
- Journals (JR1) R3
- Journals (JR1) R3 archive
- Journals (JR1) R4
- Journals (JR1) R4 archive
- Books (BR1) R3
- Books (BR1) R4
- Book Sections (BR2) R3
- Book Sections (BR2) R4
- Database (DB1) R3
- Database (DB1) R4

Instructions.

- Save file as .txt files in tab delimited format
- File may not be larger than 5MB
- Ensure column headers conform to Counter's standards for the report type
- More info: [http://www.projectcounter.org/code\\_practice.html](http://www.projectcounter.org/code_practice.html)

### Recent Imports

Displaying 1 to 20 of 504 Records

Import Date	Imported By	Import Summary
04/17/2015 11:10 am	aimre	31 titles processed. ingenta2015March.txt Journals (JR1) R4 2015 for Jan-Dec
04/17/2015 11:00 am	aimre	135 titles processed. nature2014Dec.txt Journals (JR1) R4 2014 for Oct-Dec
04/10/2015 02:42 pm	aimre	1596 titles processed. metapress2014Dec.txt Journals (JR1) R3 2014 for Jan-Dec
03/06/2015 11:25 am	aimre	14 titles processed. euclid2014Dec.txt Journals (JR1) R3 2014 for Jan-Dec
02/25/2015 02:25 pm	aimre	2 titles processed. jsad_2014Dec.txt Journals (JR1) R3 2014 for Oct-Dec
01/27/2015 03:46 pm	aimre	600 titles processed. inst_usage_1150030449576037311093.txt R4 archive 2014 for Jan-Dec
01/27/2015 03:45	aimre	600 titles processed.

# On screen instructions

CORAL Usage Statistics

Hello, Andrea Imre [logout](#)

Home File Import SUSHI Admin Report Options Usage Reports Change Module

### Usage Statistics Import

**File:**  No file selected.

**Layout:** Journals (JR1) R3

Override previous month verification

### Recent Imports

Displaying 1 to 20 of 504 Records

<< 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 >>

Import Date	Imported By	Import Summary		
04/17/2015 11:10 am	aimre	31 titles processed. ingenta2015March.txt Journals (JR1) R4 2015 for Jan-Dec	<a href="#">view log</a>	<a href="#">view archive</a>
04/17/2015 11:00 am	aimre	135 titles processed. nature2014Dec.txt Journals (JR1) R4 2014 for Oct-Dec	<a href="#">view log</a>	<a href="#">view archive</a>
04/10/2015 02:42 pm	aimre	1596 titles processed. metapress2014Dec.txt Journals (JR1) R3 2014 for Jan-Dec	<a href="#">view log</a>	<a href="#">view archive</a>
03/06/2015 11:25 am	aimre	14 titles processed. euclid2014Dec.txt Journals (JR1) R3 2014 for Jan-Dec	<a href="#">view log</a>	<a href="#">view archive</a>
02/25/2015 02:25 pm	aimre	2 titles processed. jsad_2014Dec.txt Journals (JR1) R3 2014 for Oct-Dec	<a href="#">view log</a>	<a href="#">view archive</a>
01/27/2015 03:46 pm	aimre	600 titles processed. inst_usage_1150030449576037311093.txt Journals (JR1) R4 archive 2014 for Jan-Dec	<a href="#">view log</a>	<a href="#">view archive</a>
01/27/2015 03:45 pm	aimre	600 titles processed. inst_usage_1140030659465728634135.txt Journals (JR1)	<a href="#">view log</a>	<a href="#">view archive</a>

**Instructions:**

- Save file as .txt files in tab delimited format
- File may not be larger than 5MB
- Ensure column headers conform to Counter's standards for the report type
- More info: [http://www.projectcounter.org/code\\_practice.html](http://www.projectcounter.org/code_practice.html)



# Confirmation notices

## Upload Process Confirmation

The file jstor2014Dec.txt has been uploaded successfully.

Please confirm the following data:

Journals (JR1) R3 for 2014

	Publisher	Platform	Print ISSN	Online ISSN	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	YTD Total	YTD HTML	YTD PDF
19th-Century Music	University of California Press	JSTOR	0148-2076	1533-8606	0	2	4	9	0	2	11	2	2	2	1	1	36	18	18
291	10.2307	JSTOR	1054-7193		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
AAA: Arbeiten aus Anglistik und Amerikanistik	Narr Francke Attempto Verlag GmbH Co. KG	JSTOR	0171-5410		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
AA Files	Architectural Association School of Architecture	JSTOR	0261-6823		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ábaco	Centro de Iniciativas Culturales y Estudios Economicos y Sociales (CICEES)	JSTOR	0213-6252		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ABA Journal	American Bar Association	JSTOR	0747-0088	2162-7983	0	0	0	0	0	0	0	2	6	8	0	0	16	11	5
ABA Journal of Labor & Employment Law	American Bar Association	JSTOR	2156-4809		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Aboriginal History	ANU Press	JSTOR	0314-8769	1837-9389	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Academe	American Association of University Professors	JSTOR	0190-2946		3	14	6	8	4	8	7	1	5	11	7	5	79	51	28



# Ease of use

- ▶ Login info pulled from Organizations module
- ▶ Interface specific notes
  - ▶ allows sharing instructions for usage stats processing

Imports

Titles

Statistics

Logins

Sushi

## Interface Logins

(none found)

[add new login](#)

## Organization Accounts

For JSTOR [view organization](#)

Login Type	Username	Password	URL	Notes
Admin	_____	_____	<a href="http://www.jstor.org/">http://www.jstor.org/</a>	Login, and go to MyJSTOR to manage account for get usage stats Current Scholarship stats are under JR1b report (its' not CNTR compliant, it is JR1 minus JR1a count) Get Alumni stats by by choosing option from pull down menu
Other			<a href="http://www.jstor.org/action/collectionsAvailable">http://www.jstor.org/action/collectionsAvailable</a>	title lists of available collections
Statistics			<a href="http://stats.jstor.org/">http://stats.jstor.org/</a>	for pre-2010 statistics

[change associated organization](#)

## Interface Notes

Start Year	End Year	Counter Compliant?	Interface Notes	
2010	Present	Y	login, go to My JSTOR; find usage stats from pull down; use pull down to get Southern Illinois University Carbondale stats (default setting = alumni account); e-mail report as TAB delimited file; R3 reports: change Column D from ISSN to Print ISSN, remove last line from Excel with JSTOR copyright info (in title field)	<a href="#">edit</a> <a href="#">remove</a>

[add new interface note](#)

# Usage Reports Add-On



## CORAL Usage Reports

Select Report

- Usage Statistics - Provider Rollup
- Usage Statistics - Publisher Rollup
- Usage Statistics - Top Journal Requests
- Usage Statistics - Yearly Usage Statistics
- Usage Statistics by Provider / Publisher
- Usage Statistics by Titles



# Export all stats by Year



## CORAL Usage Reports

### Usage Statistics by Titles ?

Year: '2014'

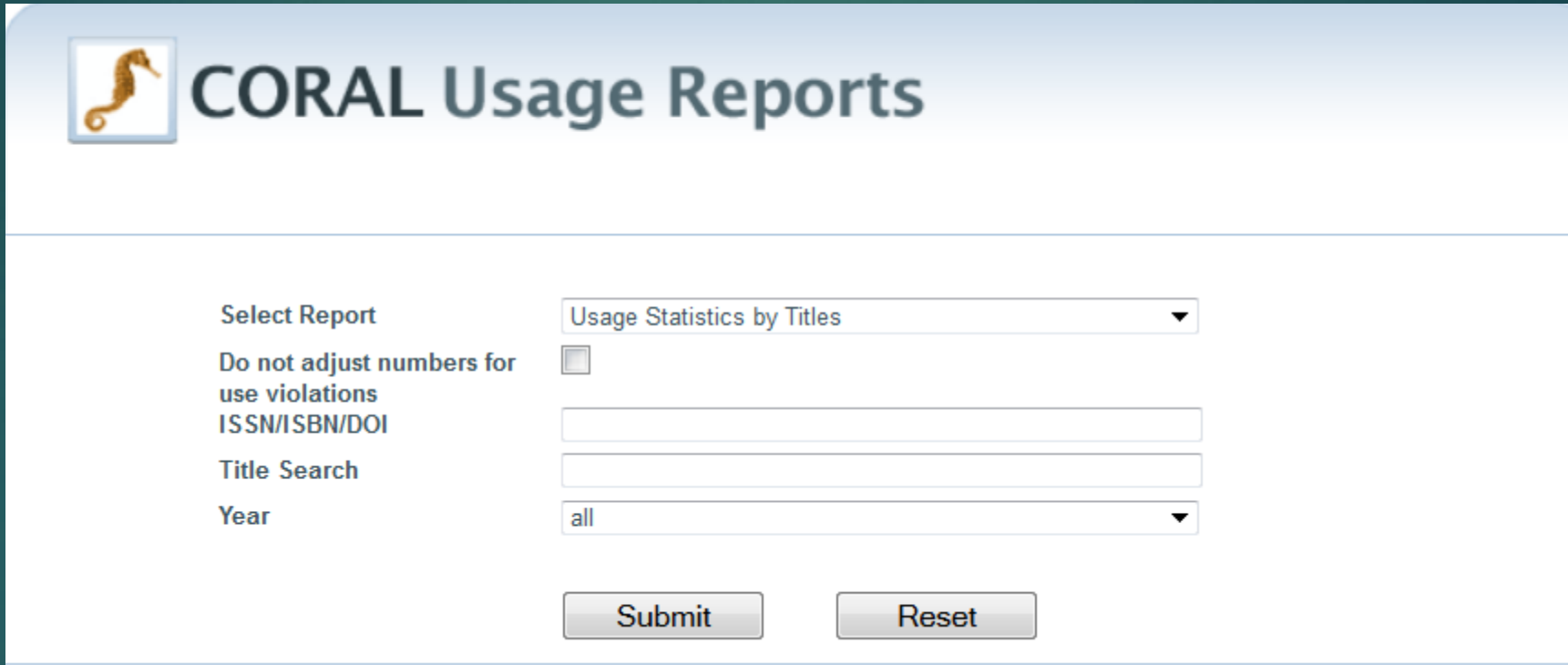
[Modify Parameters](#) [Create New Report](#)




### Number of Successful Full-Text Article Requests By Month and Resource

Title	Publisher	Platform	Year	Doi	Print Issn	Online Issn	Isbn	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Ytd Total	Ytd Html	Ytd Pdf	Outlier Flag
<a href="#">*Atiqot / עתיקות</a> <a href="#">view in link resolver</a>	Israel Antiquities Authority / רשות העתיקות	JSTOR	2014		0792-8424			0	0	0	0	0	0	0	0	0				0	0	0	N
<a href="#">19th-Century Music</a> <a href="#">view in link resolver</a>	University of California Press	JSTOR	2014		0148-2076	1533-8606		0	2	4	9	0	2	11	2	2				32	17	15	N
<a href="#">291</a> <a href="#">view in link resolver</a>	10.2307	JSTOR	2014		1054-7193			0	0	0	0	0	0	0	0	0				0	0	0	N
<a href="#">2D Materials</a> <a href="#">view in link resolver</a>	IOP	IOPscience	2014	10.1088/issn.2053-15		2053-1583		0	0	0	0	13	7	2	4					26	13	13	N
<a href="#">3 Biotech</a> <a href="#">view in link resolver</a>	Springer	Springer	2014	10.1007/13205.2190-5	2190-572X	2190-5738		0	0	0	0	0	0	3	0	2				5	0	3	N
<a href="#">3D Printing</a> <a href="#">view in link resolver</a>	Mary Ann Liebert, Inc., publishers	Mary Ann Liebert, Inc. Online Customer Support	2014	10.1089/3dp	2329-7662	2329-7670		0	0	1	0	0	0	0	0	0				1	1	0	N
<a href="#">3D Research</a> <a href="#">view in link resolver</a>	Springer	Springer	2014	10.1007/13319.2092-6		2092-6731		0	0	0	0	0	0	0	0	0				0	0	0	N
<a href="#">4OR: A Quarterly Journal of Operations Research</a> <a href="#">view in link resolver</a>	Springer	Springer	2014	10.1007/10288.1614-2	1619-4500	1614-2411		0	0	0	0	0	0	0	0	0				0	0	0	N
<a href="#">A.I.E.E., Journal of the (1924 - 1930)</a> <a href="#">view in link resolver</a>	IEEE	IEEE Xplore	2014		0095-9804			0	0	0	0	0	0	0	0					0	0	0	N

# Reporting on a specific title



The image shows a web interface for "CORAL Usage Reports". At the top left is a logo featuring a seahorse. The main heading is "CORAL Usage Reports". Below this, there are several form elements: a dropdown menu for "Select Report" with "Usage Statistics by Titles" selected; a checkbox for "Do not adjust numbers for use violations ISSN/ISBN/DOI" which is unchecked; two empty text input fields for "Title Search"; and a dropdown menu for "Year" with "all" selected. At the bottom are two buttons: "Submit" and "Reset".

 **CORAL Usage Reports**

Select Report

Do not adjust numbers for use violations ISSN/ISBN/DOI

Title Search

Year



# CORAL Usage Reports

## Usage Statistics by Titles ?

ISSN/ISBN/DOI: '0001-4826'

[Modify Parameters](#) [Create New Report](#)



### Number of Successful Full-Text Article Requests By Month and Resource

Title	Publisher	Platform	Year	Doi	Print Issn	Online Issn	Isbn	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Ytd Total	Ytd Html	Ytd Pdf	Outlier Flag
<a href="#">The Accounting Review view in link resolver</a>	American Accounting Association	JSTOR	2014	10.2308/accr	0001-4826	1558-7967		4	0	8	8	3	6	11	5	7	14	13	30	109	58	51	N
<a href="#">The Accounting Review view in link resolver</a>	American Accounting Association	Allen Press Pinnacle	2014	10.2308/accr	0001-4826	1558-7967		0	0	0	0	0	0	0	0					0	0	0	N
<a href="#">The Accounting Review view in link resolver</a>	American Accounting Association	Allen Press Pinnacle	2013	10.2308/accr	0001-4826	1558-7967		1	1	0	0	0	0	0	0	0	0	0	0	2	0	2	N
<a href="#">The Accounting Review view in link resolver</a>	American Accounting Association	JSTOR	2013	10.2308/accr	0001-4826	1558-7967		16	57	35	40	25	10	14	8	2	2	2	6	217	127	90	N
<a href="#">The Accounting Review view in link resolver</a>	American Accounting Association	EBSCOhost	2013	10.2308/accr	0001-4826	1558-7967		132	34	30	28	7	20	9	53	10	7	4	4	338	18	320	Y
<a href="#">The Accounting Review view in link resolver</a>	American Accounting Association	JSTOR	2012	10.2308/accr	0001-4826	1558-7967		46	19	16	15	17	3	6	7	27	18	10	52	236	135	101	N
<a href="#">The Accounting Review view in link resolver</a>	American Accounting Association	Allen Press Pinnacle	2012	10.2308/accr	0001-4826	1558-7967		0	0	3	0	1	0	0	0	0	0	0	0	4	1	3	N

# Assessment of CORAL

- ▶ Right choice for us
  - ▶ No subscription fees
  - ▶ We use it as it fits our library work
- ▶ Technical issues:
  - ▶ CORAL ERM website: <http://coral-erm.org/>
  - ▶ LISTSERV URL: [listserv@listserv.nd.edu](mailto:listserv@listserv.nd.edu)
  - ▶ Collaboration with systems staff



# Questions?

Andrea Imre

Southern Illinois University Carbondale

Morris Library

[aimre@lib.siu.edu](mailto:aimre@lib.siu.edu)