CORAL Resources Module User Guide
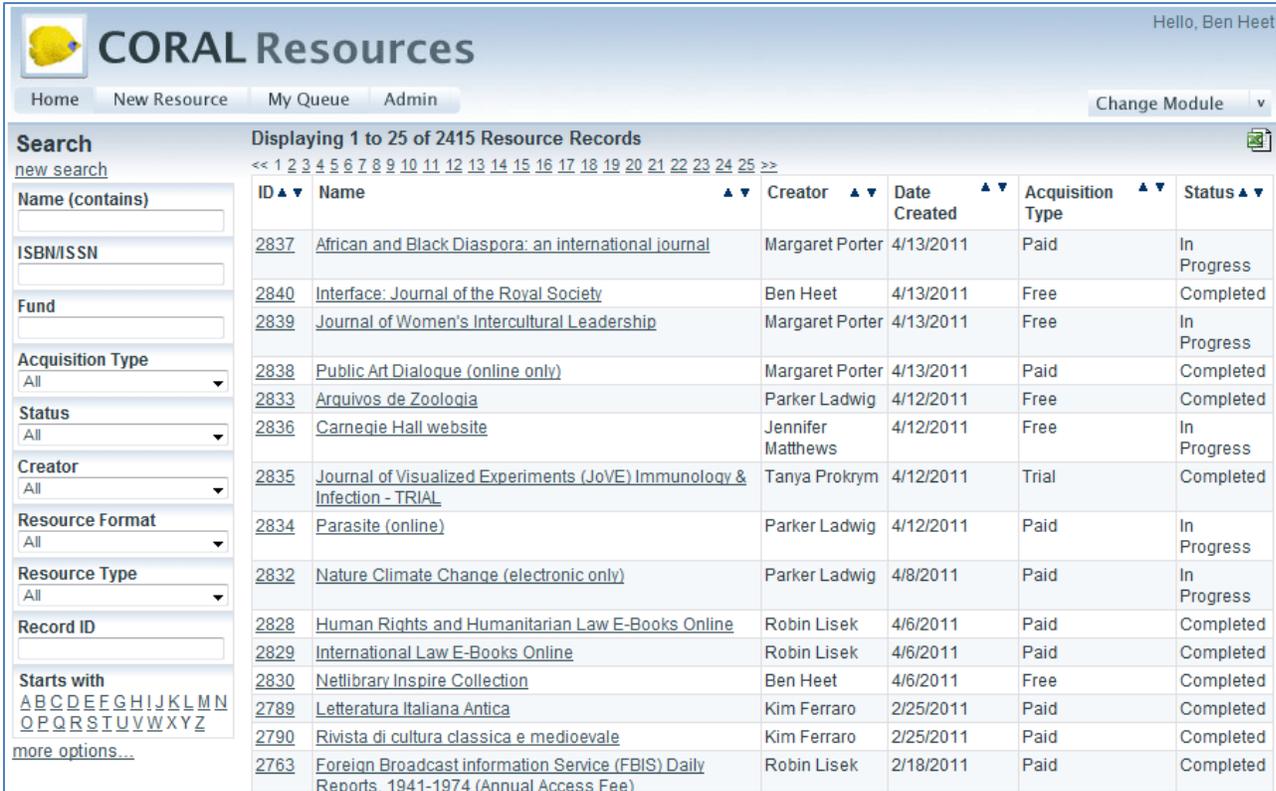
About CORAL Resources

A component of Hesburgh Libraries locally developed ERM, CORAL Resources aids in the management of the electronic resource workflow from the initial request through the acquisition process and into ongoing support and maintenance. CORAL Resources supports the completion of these workflow processes with a convenient task-based queue in which automated email alerts indicate to staff when new tasks are available.

Component Overview

CORAL Resources has four major components in the primary navigation at the top of each page.

- Home
- New Resource
- My Queue
- Admin

Home

Home provides both search and AZ browse access to the resource records. The *Name (contains)* field searches against resource name, resource alias, parent resource name and organization name. Multiple fields can be combined in a single search for more precise searching. Search results can be exported to a spreadsheet using the excel icon in the upper right corner. The exported file includes more fields than what are displayed on the search results page.

New Resource

Add New Resource

* required fields

Product

Name: *

Description:

Provider:

URL:

Format *

⦿ Electronic   ○ Print + Electronic

Acquisition Type *

⦿ Paid   ○ Free   ○ Trial

Initial Cost

Fund: Price: Type:

[ ] [ ] USD ▾   [ ] ▾   (Add)

Resource Type

○ CD networked   ○ CD standalone   ○ Database

○ Journal   ○ Other

Notes

Include any additional information

[save]   [submit]   [cancel]

All new resource records are added through this form. The form includes only select fields which are the most critical for processing new resource requests. The goal was to provide collection managers with a simple and easy to use form for submitting new resource requests. The only required fields are resource name, format and acquisition type.

The *Format* field is meant to indicate the publication medium requested with the most obvious values being print and electronic. *Acquisition Type* is primarily meant to indicate the distinction between paid and free resources. *Resource Type* is optional and provides additional context to the type of resource being requested. The values listed for all three of these fields can be edited through the Admin page detailed later in this user guide.

The form allows the option to either save or submit the information entered. The submit option will commit the new request and the system will initiate the workflow for that resource and will send out an email alert that a new resource has been entered. The save option will save the information to the user's *My Queue* page where it can be completed and submitted at a later time.

Please note that the system does allow duplicate records for the same resource to be entered. The form will however alert the user that another record with the same resource name already exists.

The Resource Record

Product

The resource record contains seven tabs where the information about the resource is logically grouped. The first tab, *Product*, contains the descriptive information such as name, alias, issn, publisher, etc which identifies and defines the resource.

Edit product details

The information on the *Product* tab can be edited by following the edit product details link or by using the edit icon on the tab. The Name, Description, URL, Format and Resource Type fields come from the Add New Resource form. The Parent field identifies a related parent resource and includes an auto-complete feature populated by existing resource records that already exist in the system. An example of a possible Parent relationship would be that between ISI Web of Science (as the parent) and ISI Proceedings Index. Another example could include a package record identified as the parent of a record for an individual journal.

The *Product* tab allows for the addition of multiple associated organizations and aliases. The values for the Organization Role and Alias Type fields can be customized through the *Admin* page detailed later in this document. The Organization field includes an auto-complete feature populated by the organizations which already exist in the system. A link to the organization's record in the Organizations Module will appear in the 'Helpful Links' box, shown in the previous figure above, if the Organizations Module has been installed and the interoperability enabled. Please see the Technical Documentation and Install Guide for details on the proper configuration settings to enable this feature.

The Archived checkbox on the Edit Resource screen will set the record status as 'Archived'. This was intended to be used to identify resources that were no longer available but for which there was value in retaining a record in CORAL.

Add new note
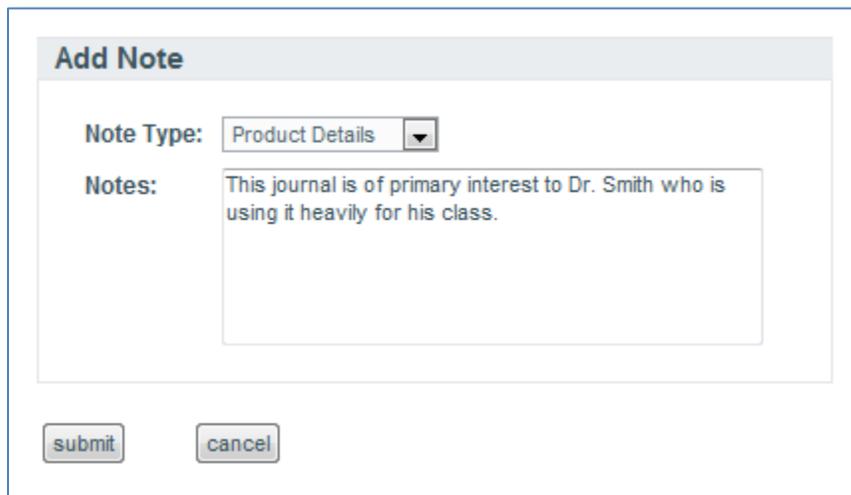
An additional notes feature has been added to the *Product*, *Acquisitions* and *Access* tab. The note will be visible only on the tab on which it is added. The Note Type field has been included to provide context to the note. The values for the Note Type field can be customized through the *Admin* page.

Acquisitions

The Acquisitions tab contains details of the libraries' acquisition of the resource such as order number, cost, fund, license status, etc.

Edit acquisitions information

The acquisitions information can be edited by using the edit acquisitions information link or the matching edit icon. The information here is meant to provide context to the local acquisitions processes. The acquisition type field is the same as was entered on the add new resource form. The initial cost data also comes from the add new resource form. The cost type field is intended to distinguish between one time and ongoing payments. The values for the cost type field can be customized through the *Admin* page. This cost record is intended to be used for recording projected initial cost for the resource. CORAL Resources does not support the tracking of cost payments over time. That will be investigated as a future enhancement.

Purchasing Site is intended to indicate the library or organization purchasing the resource. The values can be customized through the *Admin* page. Order number and System Number fields are meant to provide match points with the ILS. Order Number is intended for the ILS order number and system number for the ILS bib system number. A link to the resource record in the libraries' web OPAC can be dynamically displayed on the *Acquisitions* tab when a bib system number is entered. See the technical documentation and install guide for the necessary settings in the /admin/configuration.ini file to enable this link.

The *Acquisitions* tab also includes the ability to track subscription periods and alert when the period expires. Enter a valid subscription end date and then check the 'Enable Alert' checkbox in cases where a subscription expiration alert is desired. The alert settings can be customized through the *Admin* page. The settings include the ability to set the email address to which the expiration alert will be sent (note this is a global setting) and the alert period. For example the alert can be set to activate on a specific number of days prior to the subscription end date. In order to implement the alerts feature the file sendAlerts.php will need to be run as a nightly cron. See the technical documentation and install guide for details.

Edit license and status

The *Acquisitions* tab includes information about the relevant license. Use the edit license and status link or the matching icon to update the license information. The values for the Licensing Status field can be customized through the Admin page. Changes to the Licensing Status field are record in the History section. It is also possible through the Edit License window to associate the resource with all relevant license records in the Licensing Module. The License Record field includes an auto-complete feature that is populated by the names of all license records in the Licensing Module. See the technical documentation and install guide for the necessary settings in the /admin/configuration.ini file to enable this functionality. A link to each associated license is added to the Helpful Links section of the resource record for quick navigation between modules.

Access

The *Access* tab includes the information about how the resource is accessed including things such as IP versus username/password authentication, simultaneous user limits, authorized sites, etc. The access information can be edited by using the edit access information link or the matching edit icon.

Edit access information

The values for all fields on the *Access* tab except for username and password can be customized through the Admin page. The Authorized Site field is intended to indicate the sites or libraries which are permitted to use the resource. Administering Site is intended to indicate the site or library which is responsible for managing the access. The remaining fields provide the technical details of the access.

Authentication Type is intended to indicate how the resource is authenticated, such as IP or user/password login. Access Method is intended to indicate where the resource is accessed. This field was primarily added to identify resources that were hosted locally, perhaps on a citrix server or in an institutional digital repository, rather than on the publisher or provider's website. Storage Location is intended for resources that have a physical component such as a CD or hard-drive backup to indicate where the resource is held.

The Username and Password fields on the *Access* tab are intended for use when the resource is accessed by patrons via a shared username and password login. This is not the login information used for resource administration. Administrative logins are to be stored on the *Accounts* tab.

Contacts

The *Contacts* tab is the same as is found on an organization record in the Organizations Module. It is intended as a directory of contact information for publishers, vendors, etc. Contacts can be added directly to the resource record using the add contact link or they can be inherited from the Organizations Module, as in the figure above. When an organization is associated with the resource on the *Product* tab all contacts that exist for that specific organization will be inherited and displayed here on the *Contacts* tab. As with Organizations, the Resources Module includes a Contact Role field for each contact (support, invoicing, etc). The values for Contact Role can be edited through the *Admin* page.

Accounts

The *Accounts* tab is the same as is found on an organization record in the Organizations Module. It is intended to store the login credentials used for administrative tasks such as registering ip addresses, downloading usage statistics, and other administration tasks. Accounts can be added directly to the resource record using the add new account link or they can be inherited from the Organizations Module, as in the figure above. When an organization is associated with the resource on the *Product* tab all accounts that exist for that specific organization will be inherited and displayed here on the *Accounts* tab. As with Organizations, the Resources Module includes a Login Type field. The values for Login Type can be edited through the *Admin* page.
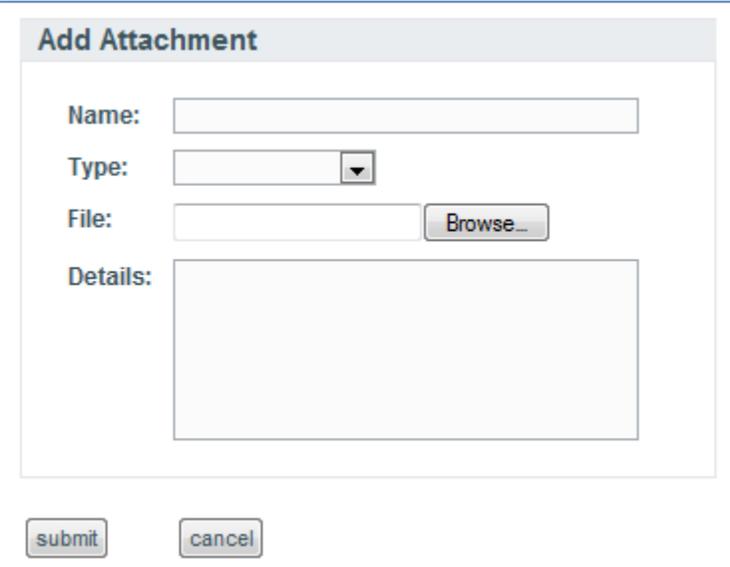
Attachments

Additional documents relevant to the resource can be uploaded and made available through the *Attachments* tab. The figure above shows a price quote which was received from the publisher. The arrow to the right of the attachment name 'American Politics Research Price Quote' opens the file. Multiple attachments are grouped and sorted by attachment type.

New attachments are added using the add new attachment link. The Name field is intended to be a descriptive name for the attachment. The Details field allows for any additional information that further explains the attachment. The attachment Type field (email, title list, etc) provides context and allows for a way to group the attachments. The values for attachment Type can be edited through the *Admin* page.

Routing

The *Routing* tab shows the workflow through which the resource needs to follow. The workflow and routing rules can be customized through the *Admin* page. That process is described later on in this document.

The figure above shows a sample workflow. The first column 'Step' is the name of the task which needs to be performed. The second column 'Group' identifies the group responsible for the task. Individuals are assigned to these groups through the *Admin* page. The 'Start Date' identifies the date at which the task became active. An email is sent to the assigned group when the task becomes active alerting the group members that they now have a task to perform. The Order Processing task has no

start date listed in the figure above because it has not yet become active. In this example the Order Processing task will not become active until after the Licensing task is completed. The last column 'Complete' will identify the date the task was completed and the person who completed the task. Clicking the 'mark complete' link will mark the task as complete.

There are two additional steps which happen as part of each workflow that are not identified as tasks on the *Routing* tab. An email alert is sent out by the system when a new record is added. The email is sent to a master email address that is specified in a configuration file (configuration.ini). The variable which sets the email address is named 'feedbackEmailAddress'. See the technical documentation and installation guide for instructions on editing the configuration file. An email alert is also sent out to this same address when all of the workflow steps have been marked as complete. The text of the email alerts is controlled through the use of template files. The templates exist in the /admin/emails/ directory. See the technical documentation and installation guide for more information on editing the email templates.

The *Routing* tab includes too additional features displayed as links on the bottom of the page as seen in the figure above. The 'restart workflow' link allows anyone with admin privilege to restart the entire workflow process. The 'mark entire workflow complete' link will mark the entire workflow as complete even if there are unfinished tasks. This feature is intended to be used in cases where the resource does not need to go through a workflow, as in cases where the record is added to the system for record keeping purposes only.
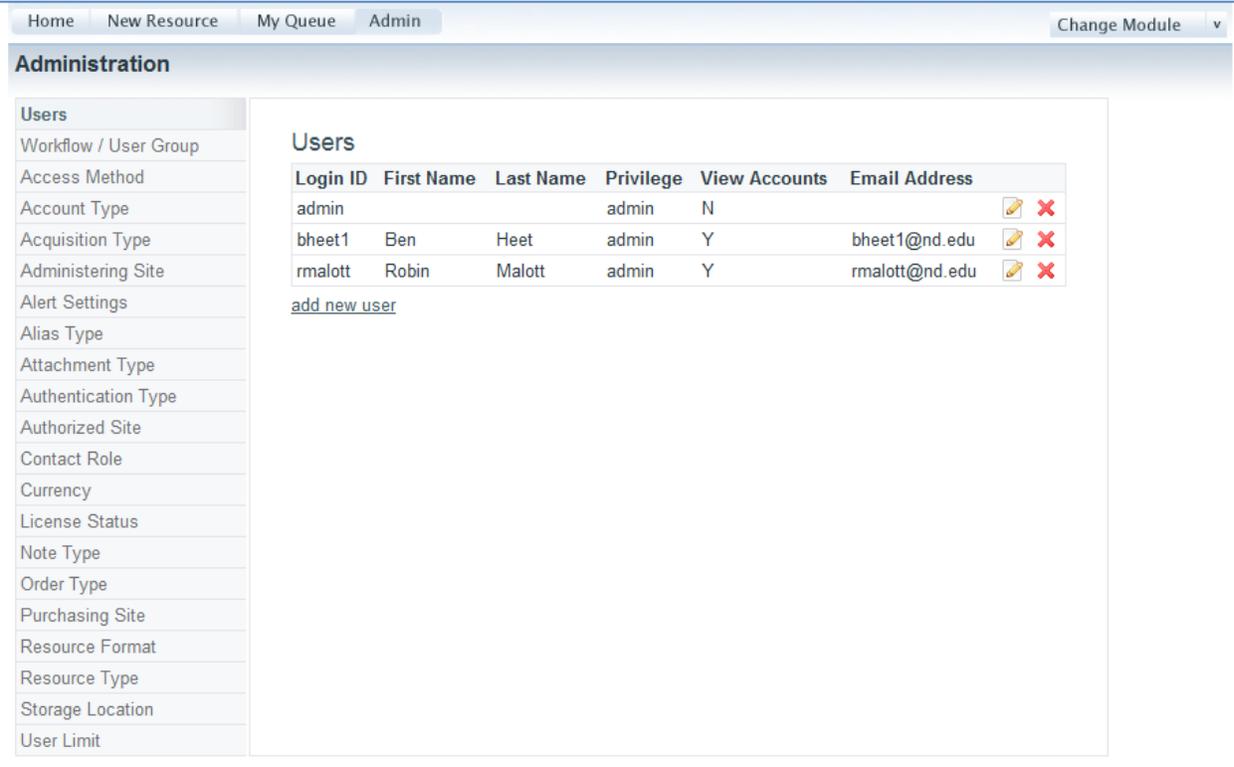
My Queue

The *My Queue* page shows the user their recent activity and their outstanding tasks. The page is divided into three tabs; Saved Requests, Outstanding Tasks, and Submitted Requests. The *Saved Requests* tab displays new resource records which the user has saved to their queue but not yet submitted. The *Submitted Requests* tab displays the user's recently submitted records which are still in process. Once the resource's workflow is complete the record is automatically removed from this tab.

The *Outstanding Tasks* tab, as shown in the figure above, displays the resources for which the user has an active workflow task which has not yet been completed. Clicking on the resource name or ID number will open the full resource record. Resources are assigned to a user's queue based on their association with a workflow group. Resources are removed from the user's queue once the outstanding workflow task on the resource's *Routing* tab is marked as complete.
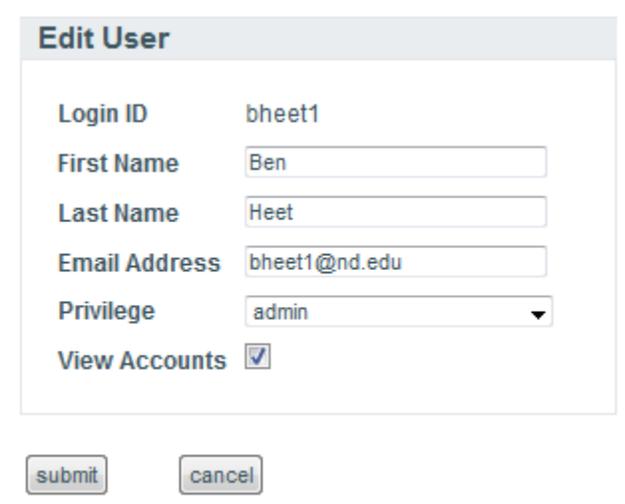
Admin

The *Admin* page is available only to users with admin privileges. It is the page through which field values are customized and through which user privilege and access is set.

Edit User

The first tab on the page is for editing user accounts. There are three privilege levels for the Resources Module; add/edit, view only, and admin. View only is the default privilege for all users who do not have an existing user entry granting them additional privileges. New with the Resources Module is the addition of the 'View Accounts' setting. The *Accounts* tab on the resource record may contain sensitive login credentials that only a select few users need to see. Checking the 'View Accounts' box on

the edit user form will allow the user to see the *Accounts* tab, for all other users the *Accounts* tab will be hidden.

Workflow / User Group

The *Workflow / User Group* tab contains the settings which control the workflow routing features. The Resources Module allows for the creation of multiple workflow rules based on resource type. The figure above shows that a workflow has been created for all resources where the Acquisition Type is 'Paid' and the Resource Format is 'electronic'. In this way an alternate workflow could be created for all Free resources that would be different than the workflow for Paid resources. New workflows are added using the add workflow link.

Edit workflow

The above figure shows the form through which workflows are created and edited. Here again the workflow being edited is for resources where the Acquisitions Type is 'Paid' and the Format is 'Electronic'. These two fields are required and as such it is required that the values for these fields be defined before creating new workflows. The Resource Type field is optional but when used allows for more granular workflows.

The Workflow Steps section allows for the addition of as many steps (or tasks as this document also calls them) as desired. Enter step name, the group assigned to the step and the parent step when appropriate. Then click the 'Add' button to add the step to the workflow. Assigning a group to each step is required and as such it is necessary to create the groups before creating workflows.
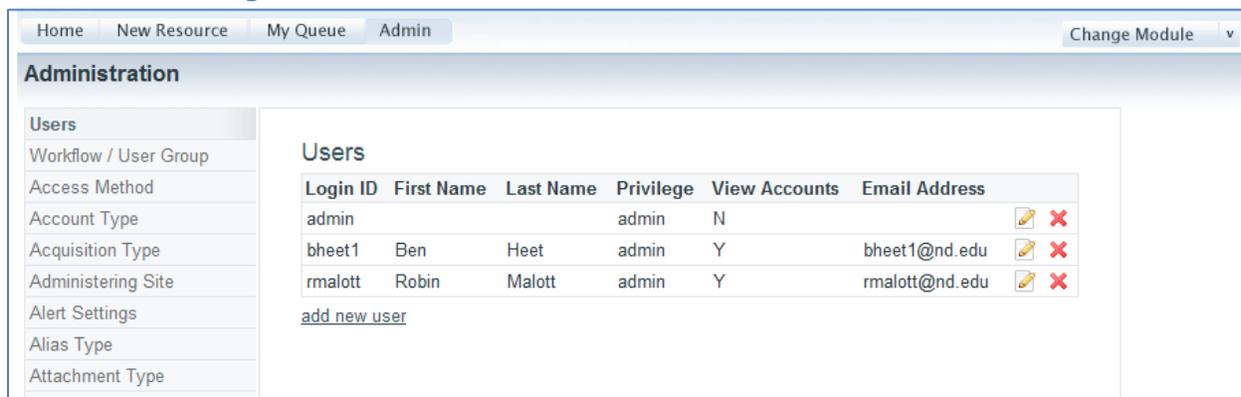
The blue arrows on the left side of the form determine the display order in which the workflow steps will appear on the *Routing* tab. The arrows do not determine the order in which the steps occur in the workflow. That order is determined by the Parent Step. Workflow steps that have no parent step assigned will become active as soon as the new record is submitted. Workflow steps that have an assigned parent step will become active once the parent step is marked as complete.

Edit user group

Each step or task in a workflow must be assigned to a user group. Enter a group name and a group email address. An email alert will be sent to this address when a new workflow step assigned to the group becomes active. Users that are assigned to the group will then have the in-process resource appear on the *Outstanding Tasks* tabs of their My Queue pages.

Other Admin Settings

There are many other fields which can be customized through the *Admin* page. Select the field you wish to edit in the left hand column and then follow the 'add new' links or the edit and delete icons to customize the field values. The fields have each been described in context earlier in this document. There is however an additional setting managed here on the *Admin* page which needs to be described in more detail; Alert Settings.
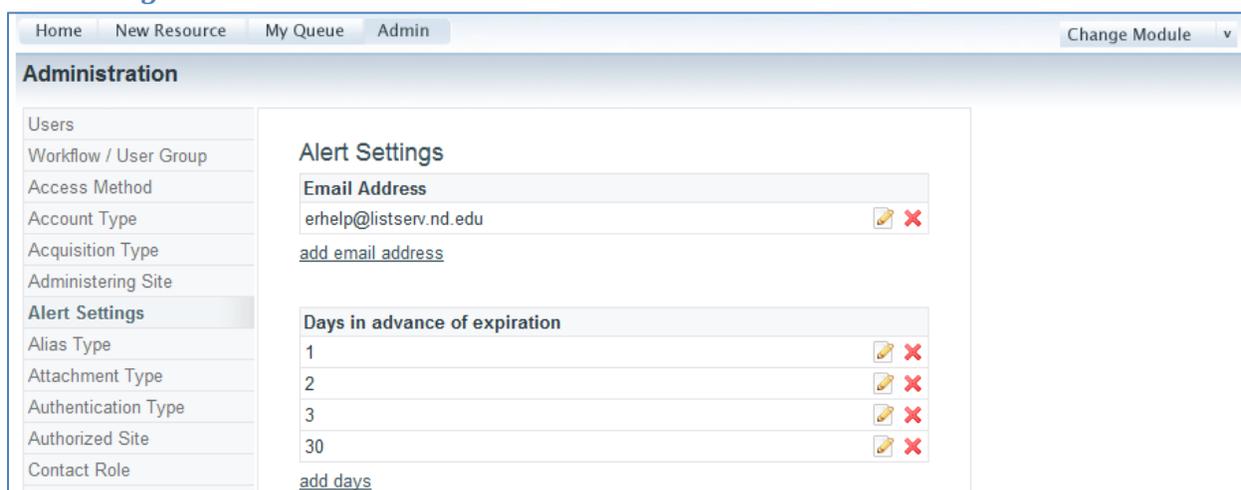
Alert settings

These alert settings determine the functionality of the alert feature associated with the subscription period end date on the *Acquisitions* tab of the resource record. Enter the email address to which the alert should be sent when the subscription period for a resource comes to a close. Then enter the number of days prior to expiration that you wish the email alert to be sent. For example, entering 30, 60, 90 days would result in the system sending an alert 90 days prior to the subscription end date, 60 days prior and 30 days prior. The system will also send an alert on the exact day of the subscription end date.