

# CORAL Terms Tool User Guide

## About the CORAL Terms Tool

An add-on to CORAL Licensing, the Terms Tool enables key stakeholders such as interlibrary loan staff to view the license terms without needing direct access to CORAL Licensing. The tool allows authorized users to retrieve license terms for a specific resource based on an ISSN or ISBN query. In addition to CORAL Licensing, the Terms Tool requires the installing site to have either the SFX or Serialsolutions openURL resolver (or alternatively any openURL resolver with an API). The Terms Tool queries the openURL resolver for a specific ISSN or ISBN, retrieves the list of available providers for that ISSN/ISBN, and then queries CORAL Licensing for the license terms for each provider. It is a multi-step process but it all takes place behind the scenes and results in a seamless easy to use process for the user.

## Enabling the Terms Tool

The process of using the Terms Tool begins with the license record within CORAL Licensing. The first step is for the licensing personnel to create a license record with completed expressions as in the following screenshot.

The screenshot shows the 'Allen Press Online Journals' license record in the CORAL Licensing system. The interface includes a breadcrumb trail, a 'License Status' dropdown set to 'Document Only', and a sidebar with navigation options: Documents, Expressions, Terms Tool, and Attachments (0 records). The main content area is titled 'For Document: Allen Press Online Journals Terms and Conditions of Use' and contains a table of expressions.

Type	Document Text	Qualifier	
Coursepacks <input checked="" type="checkbox"/>	C. Not Permitted Authorized Users at the Subscriber's institution may not ... 2. transmit the digital source code, whether plain ASCII or tagged, and use contents and articles from Publisher in course packs ...	Prohibited	<a href="#">edit</a> <a href="#">remove</a>
	Display Notes: • Coursepacks are not permitted. <a href="#">add/view display notes</a>		
Interlibrary Loan <input checked="" type="checkbox"/>	Provided that the copyright header attached to the article is retained, Authorized Users at the Subscriber's institution may Provide facsimile images that are exact representations of the Journal pages or of printouts from the electronic database for interlibrary loan under CONTU (National Commission on New Technological Uses of Copyright Works) ( <a href="http://www.cni.org/docs/infopols/CONTU.html">http://www.cni.org/docs/infopols/CONTU.html</a> ) guidelines and distributed in paper, fax or digital form.	Permitted	<a href="#">edit</a> <a href="#">remove</a>
	Display Notes: • Retain and include copyright header attached to article • Must be facsimile images - exact representations of Journal pages or of printouts from the electronic database • Can be distributed in paper, fax, or digital form <a href="#">add/view display notes</a>		

Please note that these are not the actual license terms for Allen Press journals. This is only a fabricated example. This license record shows both the Coursepacks and Interlibrary Loan expressions for the license agreement titled *Allen Press Online Journals Terms and Conditions of Use*. There are two important items to note about these expressions that directly impact the terms tool. The first is that the expressions are using Display Notes rather than Internal Notes. Each expression type can be configured within the CORAL Licensing Admin tab to use either Display or Internal Notes. Only those expressions which use Display Notes are made available through the Terms Tool. The second item of note is the presence of the checkbox next to the expression type. This is the Terms Tool Checkbox. It is used by the licensing personnel to indicate that the expression is completed and is ready to be included in the Terms Tool. The action of checking this box will send out an email to the personnel managing the Terms Tool

alerting them that new license terms are available. The recipients of this email are configured on the Admin tab of CORAL Licensing. The following screenshot shows the details of a user entry in CORAL Licensing. Any user with an email address in the 'Terms Tool Email' field will receive the system generated email when the terms tool checkbox is selected.

**Update User**

**Login ID**   
**First Name**   
**Last Name**   
**Privilege**    
**Terms Tool Email**

### Mapping License Terms to Resources

At this point there is a completed license record showing the terms for the license agreement *Allen Press Online Journals Terms and Conditions of Use*. The next step which needs to be completed is to identify which journals are covered by this specific license agreement. This is accomplished using the 'Terms Tool' tab on the license record as in the following screenshot.

Allen Press Online Journals [edit license](#) | [remove license](#) License Status: Document Only

Allen Press [edit organization](#)

Documents	For Document	Resource		
	Allen Press Online Journals Terms and Conditions of Use	Allen Press	<a href="#">edit</a>	<a href="#">remove</a>

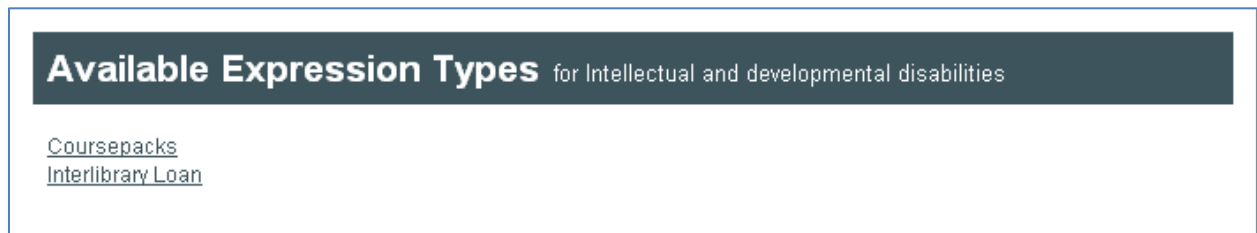
**Expressions**  
**Terms Tool** [add new terms tool resource link](#)  
**Attachments** (0 records)

The task is to identify which journals are covered by the *Allen Press Online Journals and Conditions of Use* license agreement. This is accomplished by making a connection between the license agreement and the list of journals as entered in the library's openURL resolver. In this example all of the journals that are covered by the terms of the agreement were activated and entered as a distinct group within the library's openURL resolver. In SFX for example this is accomplished by activating all the journals covered by the agreement within the same target. The target is then given a target public name of 'Allen Press' (serialsolutions calls this field databaseName). Then within the 'Terms Tool' tab of CORAL Licensing the link can be entered between the document *Allen Press Online Journals and Conditions of Use* and the SFX target named 'Allen Press'. The Terms Tool will now know that all journals available within the Allen Press target are covered by the terms of this specific license agreement.

The Terms Tool now has the information it needs to operate. The scenario is as follows. The Terms Tool receives an ISSN via the url <http://.../coral/terms/?issn=XXXX-XXXX>. The Terms Tool sends a query with the provided issn to the library's openURL resolver. The openURL resolver returns an xml reply listing all of the provider names (SFX's target public name or SerialsSolutions' databaseName) for the provided ISSN. The Terms Tool queries CORAL Licensing for all license agreements which have been mapped to each provider name and retrieves all of the associated license terms from the identified license agreements. The terms are then displayed on screen to the user.

### Terms Tool in Action

The following screenshot shows the Terms Tool display for the journal *Intellectual and Developmental Disabilities* (issn 1934-9491).



**Available Expression Types** for Intellectual and developmental disabilities

[Coursepacks](#)  
[Interlibrary Loan](#)

At this point the Terms Tool has already queried both the openURL resolver and then CORAL Licensing and identified that Coursepack and Interlibrary Loan terms are available for this journal. The link for Interlibrary Loan leads to the following screenshot.



**Interlibrary Loan Terms** for Intellectual and developmental disabilities

**Allen Press**  
Terms as of 09/29/2010. The following terms apply ONLY to articles accessed via [Allen Press](#)

**Interlibrary Loan Notes:** ✓

- Qualifier: Permitted
- Retain and include copyright header attached to article
- Must be facsimile images - exact representations of Journal pages or of printouts from the electronic database
- Can be distributed in paper, fax, or digital form

▶ [view license snippet](#)

And in the above screenshot the user now sees the specific interlibrary loan license terms for this journal. Access to this journal is available via Allen Press and interlibrary loan use is permitted. The Display Notes from the license record detail how the interlibrary loan is to be handled. The actual document text from the license agreement is hidden beneath a 'view license snippet' link for those wishing to see the original language. The provider name at the end of the opening line is hyperlinked and will take the user directly to the provider's webpage for the journal. This example lists only one provider, Allen Press, but the Terms Tool will display terms for all providers when the library does have

access through multiple providers. If no license terms are available for a provider the Terms Tool will show that as well as in the following example.

**Coursepacks Terms** for BMC developmental biology

**BioMed Central**  
Terms as of 07/28/2010. The following terms apply ONLY to articles accessed via [BioMed Central](#)

**Coursepacks Notes:** X

- Qualifier: Prohibited

▶ [view license snippet](#)

**PubMed Central**  
No Coursepacks terms are defined.

**Science in Context**  
No Coursepacks terms are defined.

**EBSCOhost Academic Search Premier**  
No Coursepacks terms are defined.

**Directory of Open Access Journals**  
No Coursepacks terms are defined.

Again, please note that the license terms in these screenshots are all fabricated examples and do not reflect the actual terms of the provider's real license agreements. In the preceding screenshot access is available to the library through multiple providers but license terms are only available for the BioMed Central access.

### Finding the Terms Tool

The Terms Tool is used by querying it with a url containing either an ISSN or ISBN such as <http://coral.mylibrary.edu/coral/terms/?issn=XXXX-XXXX>. Using the Terms Tool requires some way for users to easily send this type of ISSN/ISBN query. One option is to place a link to the Terms Tool on the library's openURL resolver menu. The template for the SFX menu, for instance, can be edited in such a way as to create a link to the Terms Tool which will dynamically use the ISSN and/or ISBN for the specific resource being requested. The University of Notre Dame chose this option and implemented the Terms Tool by placing the necessary code in the footer of the SFX menu template. Similar options should exist for the SerialsSolutions openURL resolver. A number of options exist for how the Terms Tool could be implemented. It will be up to each library to determine how they wish to create the necessary ISSN/ISBN links.

### Technical Documentation

Additional technical documentation for installing and implementing the Terms Tool is available on the CORAL Documentation page. Please read the technical documentation thoroughly as it explains additional details and configuration options necessary for proper use of the Terms Tool.