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Executive Summary

Introduction

The CORAL Web-Documentation Survey was sent out to the CORAL-ERM listserv on October 13, 2015. At the time of the survey posting, the listserv consisted of 322 participants. The survey was reposted to the listserv as a reminder on October 27 that the survey would close in two days. The committee discontinued taking any more survey participants on October 30. The survey received responses from 49 participants. The committee suspects most of the survey participants subscribe to the CORAL-ERM listserv, but recognize that the survey may have been shared to other CORAL users. The survey results show that 39 of the 49 participants are current CORAL users. Be aware that 49 responses from 322 participants does not represent statistical significance and should be interpreted accordingly. Nonetheless, the committee holds the given responses are beneficial to future planning and in assessing ongoing needs for the CORAL community.

Summary of Findings

The CORAL Web Committee sees the survey as identifying key targets for improvement regarding documentation of CORAL. Users appear to be strongly interested in improved software versioning and updates information, user guides, and installation documentation. The consensus appears to be that the documentation needs improvement. The information presented and made available via the CORAL website and GitHub needs to be organized better to reduce confusion and improve discovery. Furthermore, other identified themes for improving the documentation include currency, simplicity (for non-techies), and better visual aids whether in screenshots and/or video instruction.
Survey Analysis

Summary of general suggestions:

1) Error definition list
2) Information on how to get involved with CORAL
3) List of organizations using CORAL
4) Field definitions
5) Data dictionary (developers)
6) Strategic Planning Info
7) FAQ page
8) In-depth features overview
9) Marketing-like info to promote how librarians can use CORAL
10) COUNTER and SUSHI connection documentation
11) Guidelines for importing resources in bulk
12) Information about CORAL committees
13) Link from web site to listserv and listserv archive
14) IRC Channel info on website
15) Software bugs/issues
16) Q & A forum, comparison made to AskUbuntu.com which is a Stack Exchange site

Summary of overall themes:

1) Keep things up-to-date: documentation, version info, presentations, etc.
2) Way better software versioning information
3) Simplify and improving the installation process
4) Improving the upgrading process
5) Keep the documentation simple for non-techy folks
6) Simplify process of where to go to find things (preference overall for the web site)
7) More screenshots and video instruction
8) Developer documentation should be closely associated with GitHub, but not necessarily exclusively. Reading between the lines I think users expect to be able to find this info from the website, but developers would expect to have it hosted on GitHub.

**Summary of development suggestions:**

1) Easy installation on WAMP Server  
2) Export Notes  
3) Notes field on Routing tab

**Survey Question Summary**

**Question 1: How long have you been using CORAL?**
### Investigating / testing the waters

<table>
<thead>
<tr>
<th>Duration</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recently, went live less than 6 months ago</td>
<td>6</td>
<td>12.5%</td>
</tr>
<tr>
<td>6 months – 2 years</td>
<td>20</td>
<td>41.7%</td>
</tr>
<tr>
<td>3 – 5 years</td>
<td>13</td>
<td>27.1%</td>
</tr>
<tr>
<td>6 years or more</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Question 2: Which CORAL modules are you using?

<table>
<thead>
<tr>
<th>Module</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources</td>
<td>43</td>
<td>95.6%</td>
</tr>
<tr>
<td>Organizations</td>
<td>40</td>
<td>88.9%</td>
</tr>
<tr>
<td>Licenses</td>
<td>36</td>
<td>80%</td>
</tr>
<tr>
<td>Statistics</td>
<td>16</td>
<td>35.6%</td>
</tr>
<tr>
<td>Authentication</td>
<td>16</td>
<td>35.6%</td>
</tr>
<tr>
<td>Management</td>
<td>6</td>
<td>13.3%</td>
</tr>
</tbody>
</table>

### Question 3: What type of library do you work in?

<table>
<thead>
<tr>
<th>Type</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic</td>
<td>45</td>
<td>91.8%</td>
</tr>
<tr>
<td>Special</td>
<td>3</td>
<td>6.1%</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Public</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Question 4: How many staff members use CORAL?

<table>
<thead>
<tr>
<th>Staff Members</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 3</td>
<td>23</td>
<td>48.9%</td>
</tr>
<tr>
<td>4 - 10</td>
<td>24</td>
<td>51.1%</td>
</tr>
<tr>
<td>11 – 25</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Over 25</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Question 5: What is your job function in the library?

<table>
<thead>
<tr>
<th>Function</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic Resources</td>
<td>27</td>
<td>55.1%</td>
</tr>
<tr>
<td>Systems and Technology</td>
<td>18</td>
<td>36.7%</td>
</tr>
<tr>
<td>Acquisitions</td>
<td>10</td>
<td>20.4%</td>
</tr>
</tbody>
</table>
Question 6: What are you looking for when you seek out information on CORAL?

<table>
<thead>
<tr>
<th>Information Type</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Guides</td>
<td>31</td>
<td>68.9%</td>
</tr>
<tr>
<td>New Features &amp; Version Info</td>
<td>23</td>
<td>41.8%</td>
</tr>
<tr>
<td>Best Practices</td>
<td>20</td>
<td>35.1%</td>
</tr>
<tr>
<td>Installation Documentation</td>
<td>15</td>
<td>25.8%</td>
</tr>
<tr>
<td>Technical Specs</td>
<td>12</td>
<td>20.8%</td>
</tr>
<tr>
<td>Development Documentation</td>
<td>11</td>
<td>19.5%</td>
</tr>
<tr>
<td>Presentations</td>
<td>8</td>
<td>13.5%</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
<td>10.2%</td>
</tr>
</tbody>
</table>

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### Question 7: In learning materials for CORAL, which medium(s) would work best for you?

<table>
<thead>
<tr>
<th>Medium</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML on the website</td>
<td>36</td>
<td>76.2%</td>
</tr>
<tr>
<td>PDFs with text and screenshots</td>
<td>33</td>
<td>70.2%</td>
</tr>
<tr>
<td>Short topical videos</td>
<td>20</td>
<td>42.6%</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

### Question 8: Are the documents and files you found on CORAL-ERM.org what you expected or needed?

<table>
<thead>
<tr>
<th>Response</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, it did not meet my needs or was confusing</td>
<td>8</td>
<td>17%</td>
</tr>
<tr>
<td>Somewhat, but a few things were missing or confusing</td>
<td>27</td>
<td>57.4%</td>
</tr>
<tr>
<td>Yes, I was completely satisfied</td>
<td>5</td>
<td>10.6%</td>
</tr>
<tr>
<td>I do not use the website CORAL-ERM.org</td>
<td>7</td>
<td>14.9%</td>
</tr>
</tbody>
</table>

### Question 9: Who installed CORAL?

<table>
<thead>
<tr>
<th>Response</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I did, completely on my own</td>
<td>17</td>
<td>34.7%</td>
</tr>
<tr>
<td>I worked with my technology</td>
<td>4</td>
<td>8.2%</td>
</tr>
</tbody>
</table>
office

<table>
<thead>
<tr>
<th>Description</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our technology staff did the complete installation</td>
<td>12</td>
<td>24.5%</td>
</tr>
<tr>
<td>It is managed and hosted by an external vendor/company</td>
<td>6</td>
<td>12.2%</td>
</tr>
</tbody>
</table>

Question 10: What level of coding are you comfortable with?
Question 11: How difficult was the installation?

<table>
<thead>
<tr>
<th>Difficulty Level</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>1</td>
<td>23.4%</td>
</tr>
<tr>
<td>2</td>
<td>10</td>
<td>21.3%</td>
</tr>
<tr>
<td>3</td>
<td>15</td>
<td>31.9%</td>
</tr>
<tr>
<td>4</td>
<td>8</td>
<td>17%</td>
</tr>
<tr>
<td>I dream in binary: 5</td>
<td>3</td>
<td>6.4%</td>
</tr>
</tbody>
</table>
Question 12: How comfortable are you with GitHub?

<table>
<thead>
<tr>
<th>Difficulty Level</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy: 1</td>
<td>2</td>
<td>9.1%</td>
</tr>
<tr>
<td>2</td>
<td>5</td>
<td>22.7%</td>
</tr>
<tr>
<td>3</td>
<td>10</td>
<td>45.5%</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td>16.6%</td>
</tr>
<tr>
<td>Very Difficult: 5</td>
<td>2</td>
<td>9.1%</td>
</tr>
</tbody>
</table>
Question 13: Are the documents and files you found on GitHub what you expected or needed?

<table>
<thead>
<tr>
<th>Response</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, it did not meet my needs or was completely confusing</td>
<td>8</td>
<td>18.6%</td>
</tr>
<tr>
<td>Somewhat, but a few things were missing or confusing</td>
<td>17</td>
<td>39.5%</td>
</tr>
<tr>
<td>Yes, I was completely satisfied</td>
<td>6</td>
<td>14%</td>
</tr>
<tr>
<td>I do not use GitHub</td>
<td>12</td>
<td>27.9%</td>
</tr>
</tbody>
</table>

Question 14: Would you recommend CORAL to another library?
Free Form Question Response Summaries

Is there any documentation you were unable to find or would like to see on the website?

1) Error database
2) Info on how to get involved with CORAL.
3) Info on CORAL committees.
4) New features documentation.
5) Current and version-based documentation written in an accessible, non-technical reading style.
6) Task-based and/or smaller topical sections in the user documentation.
7) Video tutorials, more visual aids such as screenshots.
8) List of organizations using CORAL, perhaps organized by geography.
9) Data dictionary for fields.
10) Easy to follow installation documentation for all platforms CORAL is available.
11) Strategic Plan
12) FAQ page.
13) Keeping all sections up-to-date, ex. the presentations page.
14) In-depth features.
15) Marketing materials for libraries considering CORAL.
16) Documentation available on website as well as Github.

What technical challenges did your library face when installing CORAL?
1) Setting up MySQL.
2) Installing CORAL.
3) Running the installation scripts.
4) Multiple modules on Github.
5) Documentation out-of-date.
6) Upgrading.

Is there any documentation you were unable to find or would like to see on GitHub?

1) Installation instructions (step-by-step)
2) Add-on functions documentation.
3) Beginner’s guide to using GitHub.
4) Info on how GitHub is used by CORAL, in particular in the development cycle.
5) Dependencies list for installation
6) Version/Upgrade info for installation.

What ongoing challenges does your library face when maintaining and updating CORAL?

1) Running different versions from latest CORAL release (this may be due to a variety of reasons some of which may include CORAL being used by a consortium or no technical support in library.)
2) Understanding CORAL versions and updates.
3) Merging localizations due to file structure changes.
4) Special characters rendering as Unicode boxes
5) Staff available with technical skills for installation, setup, and upgrades.

Is there anything else that you would like to add or change about the CORAL website?

1) Improve use of screen space and use icons better to communicate info to the user.
2) Antiquated feel to how screen space is used.
3) Add a link/page in CORAL that goes to CORAL Web page, listserv info, IRC channel and possibly more.
4) Bug/issue/error database.
5) Better more thorough documentation.
6) Simpler process for installation.
7) Community forum.
8) Change CORAL from multiple modules to single module.
9) Clear distinctions between user and technical documentation.
10) Simple documentation for libraries’ without technical staff. More visual with videos.
11) Unified Web presence.
12) Currency!

Additional Features Requested Summary

1) Notes feature on Routing Tab
2) Export Notes field
3) Formalized process for CORAL development which includes the Steering Committee and users.

Appendix – Complete Free Form Responses

Note: Minimal edits were made to the responses to protect the privacy of the contributors and remove confidential information.

Is there any documentation you were unable to find or would like to see on the website?
1) Coral Error’s, I wanted to search for an error I received and found no documentation regarding errors from coral and what to do to fix it.
2) I would like to see more information on how I can get involved with the CORAL project.
3) When ever new features added, there is less documentation available. For example, the gokb integration is only available as documentation in the mailing list, but no clear mention about this on any specific page of CORAL.
4) Documentation on Version 1.3
5) We used the module guides a lot and they were useful when we started. After we implemented Coral, we just needed other library staff to do only certain tasks whom didn't need to read the whole user guides. It would have helped if the user guides were broken down to smaller pieces. Some of the staff were more visual learners then readers. Short video tutorials would be have been great.
6) Statistics module never did work for us.
7) List of organizations using CORAL Looks like the website and user guides documentation has been updated recently, but previously, I had trouble finding information about field definitions. Now the documentation has been edited to include more of that. What may also help is a data dictionary of all the fields.
8) A simplified version of how to install CORAL. Perhaps a way to install it locally on a windows machine, such as by using Wamp Server.
9) Version history documentation Strategic planning (what's next, when and by whom)
10) I'd like a simple step--by--step installation instruction on how to install CORAL on a windows server, such as WAMP.
11) The presentation page needs to be updated to include the most recent ones. The documentation page needs to be updated to include documentation for the most recent release. A FAQ page would be helpful for users.
12) Would like to see non-technical documentation that is understandable for librarians who are not coders by trade.
13) I'd like to see more in-depth features overview. Marketing--esqe material on the CORAL website to communicate how librarians could use it.
14) I wish the technical documentation was on the website as well as on GitHub.
15) Updated versions of user guides etc.
16) 1, Specific documents on COUNTER and SUSHI connection in resource usage part. 2, Resource bulk import guidelines documents
17) It will be helpful if there are more samples' screenshots; live short videos.
18) who else in my area is also using Coral
19) Information about the steering committee and any other active groups such as the web committee.

**What technical challenges did your library face when installing CORAL?**

1) Setting up the MySQL in order to stop the Authentication module from throwing errors. multiple MySQL databases needed -> managing users on those DBs. running installation scripts for 4/5 modules, could be integrated. multiple distribution files -> confusing which ones I needed.

2) One of the installation scripts was not ok

3) We hope all modules can be under one GitHub repository.

4) I think some of the documentation was out of date.... But the listserv answered all my questions.

5) Not too many.

6) Had to move from a local server to a hosted server - but it moved easily.

7) Upgrading can be an issue even when using GIT

8) the /install/ doesn't really work, things were better when using github code instead of the release download from the website, but not that much better. I strongly believe that all "auto-install" features should be abandoned in favor of classic manual installation with proper documentation. only the sql dumps should be "pre-prepared". a conf file works better. This possibility of course is already present, however it is not clear from documentation which steps need to be taken.

9) Missing files (Stats module) Multiple install stages, one for each module

10) Figuring out how to get the web installer started without having errors. Such as how to get the MySQL to link up with the PHP.

**Is there any documentation you were unable to find or would like to see on GitHub?**

1) I'm not technical, so using github was confusing, but I did find what I needed there

2) It's not clear what is best suited to GitHub (e.g. glossary, SUSHI documentation) vs. what is to be expected elsewhere such as on coral-erm.org. My preference is that coding stuff reside on GitHub but everything else be collocated elsewhere such as on coral-erm.org.

3) Nope.

4) Step--by--step installation instructions from the beginning.

5) The documentation for add-on functions on GitHub seems to be updated. I see more on the website than what's on the GitHub.

6) A beginner's guide for new users, and step by step instructions, with pictures on how to install CORAL.
7) Probably! I can't make heads or tails out of github.
8) more information about the flow of development for CORAL using the github tool. Couldn't figure out which set of files I would download, were I starting a new installation.
9) I was not clear if I should be using the official releases or the more updated master branches of the individual modules. Also it was not clear if there was a requirement for what other I should install modules if I wanted to use more than one. It would help to be told somewhere if the order of installation matters or even encouragement that the order of model installation does not matter.
10) Not sure about this - since I don't use it, I am not sure what advantages is has in using it.
11) It was our understanding that GitHub is for coders and developers. So we didn't use it all. We only sent the ITC folks over to GitHub.

What ongoing challenges does your library face when maintaining and updating CORAL?

1) Because we are not managing the technical end ourselves and are working with the rest of our consortium, we do not always have the most recent update for each module implemented. I would like to be able to export notes. I would also like there to be a notes field on the Routing tab. (For example, I would like to be able to say which specific person I emailed to request a quote.)
2) It is very challenging to figure out versioning. Also, to understand the best way to work through enhancing the software.
3) We experience no problems updating CORAL. If there are bigger updates we run a test installation first.
4) It's hard to tell when a new version is available and what I'm getting with the new version.
5) With changes in file structure merging localizations was complicated
6) now and then we have had issues with special characters in titles rendering as strange little unicode boxes...possibly artifacts from copy and paste into CORAL. we have sometimes had issues when moving things around with database encoding and connection encoding issues.
7) Staff time.
8) For most modules not a problem. The Usage Statistics module I had to make some modification to make it work on the hosted server. I've also heavily modified the reporting module, mainly because I need different reports than the ones listed. So I don't think I'll be able to update it unless there is an option to create custom reports.
9) CORAL still compares unfavorably with the spreadsheets and data available on a shared drive. CORAL's interface is more pleasant looking, but slower and less powerful.
10) Knowing when/which updates are available.
11) So far we have little customization work done to our fork of Coral base code and ever upgraded our instance to v1.0 without seeing any issue. But as aforementioned, we would like to see all modules put under one Github repository to ease version control and maintainance tasks.
12) It is very slow to load -- especially when searching for something. Our IT department tinkered with it a bit but it is still not functioning correctly.
13) Knowing when to update and if the changes are worth it.
14) Even though we have the advantage of our campus IT with Coral installation, we are very dependent on them. We've been wanting to get Coral updates installed but we have to wait till IT is not busy, which is understandable. Also, we find listserv sometimes very overwhelming. We find the announcements for CORAL updates through listserv useful. But when we get coding or configuration emails, we are confused and not sure if we should route this to your ITC or not. When there are lots of email conversation, we tend to loose track.
15) The biggest challenge is to balance the local needs with community needs when local libraries want to do development work on CORAL. The Steering Committee needs to establish a formalized process which can bring more users into the conversation for decision making.
16) Making sure we remember to update CORAL with the information. Figuring out what information to put in CORAL and figuring out if there is information that can be expired. Making sure new staff members get familiar with CORAL.
17) Keeping support with our consortium’s systems support staff.
18) Getting it to work correctly.
19) We have a talented and devoted library tech support and programming team which really helps.

Is there anything else that you would like to add or change about the CORAL website?

1) The Coral website is easy for us to navigate through and well organized, but the icons for Coral modules don’t deliver any informative things to me and may be worth redesigning. The other thing which is a little bit subjective is that Coral website and the Coral Application waste too much surrounding screen space and this makes the look and feel of these two a little bit antiquated.
2) In my humble opinion... 1) There should be a link to the "home page" of the CORAL mailing list and a mention that one exists, so one can quickly run a search on old messages and/or sign up for the mailing list. Currently it appears that the current
CORAL site only links to this email address coral-admin@listserv.nd.edu, which I then had to figure out on my own that there is a mailing list. 2) There is no mention of an IRC channel. Thankfully I knew Remington from the Evergreen community, and he told me the IRC channel name. Thanks and keep up the good work,

3) Maybe it is somewhere, but there doesn't seem to be a place for issues/bugs with the software. It would be nice to know if something which doesn't work on our site, whether other people found it also didn't work for them. This was especially true for the reports module, when I discovered the SQL statements in it didn't work in my environment. And there are a few things in the Usage Statistics module that still aren't working on our site. Don't know if is a local problem or a bug in the software.

4) I love the simplicity of CORAL. I hate the skeletal documentation of the website.

5) Great tool...would love to see a single ZIP file download and all installation is handled by web UI.

6) I think the website should have a section similar to askubuntu.com website, where common problems have a straight answer, community driven. I also believe that the documentation section could be much improved. non-website related note: One of the issues I find most frustrating is how separate the single modules are. Or rather, I appreciate that I only need to install one module instead of all of them, but I wish that you would adopt a "common" package which would eliminate all redundant code, I mean, I want the same header/footer on all modules. I just seems more fragmented than modular at this point. Thanks!

7) We feel that there needs to be a clear distinction between training resources for how to use CORAL and technical resources for how to install, maintain and troubleshoot.

8) Add instructions for non-technical users, so that small libraries who cannot afford a dedicated IT Staff member can install and maintain CORAL. If we could know how to install CORAL on our local computer without a lot of technical expertise, it would serve our needs greatly. The test installation is marvelous, so we would love to use it.

9) I look forward to a much more useful and expanded CORAL website.

10) I would like a more unified web presence (and I imagine that's what you're working on). There are too many different places to go for different types of information, so I usually just don't bother because I don't know where to look.

11) Currency is important. Thanks for your work!!

12) I have not tips for the coral community, unfortunately I depend on others for tips and clarification.

13) More implementation documentation, with pictures and/or videos. Links to various support sites or companies that provide support.
14) Overall, it's looking good except that documentation needs to be updated.
15) Great job! I love CORAL!