

# Planting a Reef: A Checklist for Getting Started with CORAL

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# Holistic Planning

Just like gardening, where stewards must consider water, soil, and light requirements, when planting a reef, taking a holistic approach towards planning your CORAL implementation will help you have a smoother implementation.

# Planning the Plan

- ✓ Driving Need - Define why you need to introduce CORAL to your organization
  - Most of your decisions and judgement calls during your CORAL implementation will be made from the perspective of your driving need to use CORAL.
  - What is the driving need for you to implement CORAL?
- ✓ Outcome Delivery - Define what you want to accomplish with implementing CORAL
  - Understanding what you want to accomplish within CORAL is key to knowing how you're going to get there during the implementation process.
  - Your overall project outcome should be aligned with your driving need.
  - What do you want to accomplish with your CORAL implementation?
- ✓ Front End Planning - Similar to a “make or buy” analysis, you’ll need to determine whether you want to perform manual data entry, have someone in-house import your existing data, or if you’ll need to contract implementation services.
  - Can we manually enter our data or should we seek implementation services to import our existing data?
- ✓ From Project to Product
  - Projects are defined as short term, defined objectives.
  - Products are long term, analyzed for ongoing viability, and benefits driven.
  - What are your end-of-year (or quarterly) workflows to maintain your records? How does CORAL accommodate those workflows?
  - Will you need additional assistance either in-house or contracted to help maintain the product over time?
    - How will the impact of our CORAL implementation on the future be measured?

# Planning the Plan - Additional questions to ask your team

- ✓ What will be different for our library, when our CORAL implementation is complete?
- ✓ Have we effectively communicated our driving need to our stakeholders?
  - Do we have the appropriate level of stakeholder buy-in to help make our CORAL implementation successful?
- ✓ Have we fully explored our scope requirements / desired outcomes?
- ✓ Are there any significant technology risks?
  - If so, are the risks within the project team's control?
- ✓ What is the intended/expected/desired date for project completion?
  - What factors determined the establishment of that date?
  - If a significant deviation in our schedule occurs, what is the potential impact on the project's viability?

# Planning the Project

- ✓ Decide what is “Doable”
  - Consider cost, time, and resource allocation
- ✓ At a minimum, you will need to begin your project with a schedule and resources plan
  - You will need to create a realistic schedule that shows the logical relationship and timing of each major activity/milestone.
  - Whether you manually enter your data or contract services, you will need to designate team members to the project.
    - Manually entering data into CORAL has been described as “labor intensive.”
    - File importing and contracting will also require staff members dedicated to mapping the existing data over to CORAL and testing the data load.
    - Can you dedicate staff to focus on the work and complete the project on time?
- ✓ Assessments
  - Assess your team’s skills and knowledge, the technology infrastructure, cost and schedule constraints, and organizational policies and procedures.

# Sequencing Plan

This is where a holistic approach is going to be highly beneficial to you during a CORAL implementation.

- While CORAL is regarded as modular, the modules do intersect with each other.
  - The type of information that you want to maintain in CORAL determines the degree of intersection.



Define what information you want to maintain in CORAL

The information that you want to maintain in CORAL will determine your implementation approach

- A few examples:
  - If you intend to associate your Resources with Organizations, I recommend that you build your Organizations module first.
  - If you initially decided to only enter basic database information (such as name and description), then later decide to add additional values (such as cost history, URL, ISSN), you will need to spend time going back through each of your resources.
  - Perhaps you initially decided to add contacts to the Resources module, then later you decide the information should live in the Organizations module.



If you are implementing CORAL in-house (i.e. not contracting), dedicate upfront time to learning all of the different options within CORAL, how the modules interact with each other, and define your approach, before you start the core work of data entry.

# CORAL considerations that will help with your approach

- ✓ Do you currently keep a file of your resources? Considering the consolidation of multiple files? How detailed are your current files? How do the values in your existing files translate to options within CORAL?
- ✓ If you are considering the use of the Resource module's Import Configuration interface:
  - Are the tradeoffs acceptable between the level of detailed information you want to import from existing files versus potential limitations within the Import Configuration interface, thus potentially making per-resource edits still required?
    - Examples:
      - Does the import configuration meet your needs for the level of information you're bringing in for Acquisitions?
      - Do your existing files note whether a resource is archived?
      - Do your existing files include contact information?
  - Organization name mapping - consider whether you want to set up the Organization Name Mapping, set up the Organization module to mirror your existing organization names, or clean up the incoming records.
    - Example:
      - If your existing file has Alexander Street Press, and the out-of-box Alexander Street Press, LLC organization is still housed in your Organizations module, upon import, you'll end up with both names listed as organizations. Coral will not automatically merge Alexander Street Press into Alexander Street Press, LLC unless you've mapped the values.

# CORAL considerations that will help with your approach



## Licensing Module

- Do you currently house your licenses in a separate repository? Do you intend to upload licenses into CORAL?



## Organizations Module

- Organization Name - If you are using existing organizations, and you are uploading files, you'll need to ensure that the incoming orgs match existing orgs or you can end up with duplicates
- Organization Role - *\*required\** when associating with resources
- Organization Contacts - Who are your contacts for these orgs / their roles? Does someone on your team already have this information gathered?
- Do you want to use CORAL to house your external logins to these orgs?
  - Have to weigh security / convenience tradeoffs
  - Passwords are stored in plaintext in the database and shown unobfuscated on screen to anyone with access to the module
  - Team-based password managers exist; they are good.



## Cost History

- Do you currently maintain cost history? How far back in time? How far back in time do you want to record this information in CORAL?

# CORAL System Requirements

To Install CORAL you'll need to gather:

- ✓ A machine to host it that meets the basic hardware and software requirements
  - 2 CPUs
  - 20G disk space
  - 2G RAM
  - PHP (7.4 is recommended)
  - MySQL (MariaDB 10.1+ works well)
  - Apache (web server, 2.4+)
- ✓ If you want to enable Koha Integration for managing Vendors
  - Enable the Koha REST API
  - A Koha User with appropriate permissions
  - OAuth API Keys for that user
- ✓ If you intend to use SUSHI to update your usage statistics you'll need to gather the necessary URLs and any API keys needed to access them

# Migrating Data

If you are migrating data into Coral organize your data based on the database they will go into.

- ✓ Baked in tools are very limited. Expect to use someone to load data on the back end or do a lot of manual entry.
- ✓ Resources are going to be the core of your content to migrate.
  - For cost history if you don't have invoice data you will have to create at least one per resource.
  - Organizations and Roles need to be mapped together for linking
  - Do not recommend piecemeal data loading
- ✓ Print Materials
  - Not made to handle print
  - No receiving or predictions
  - Can link out to a URL for a web based ILS if it has usable URLs

# Thank You

Thank you for being here with us today. Also, thank you to our families and colleagues who helped make it possible for us to be here together.

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