

CORAL Resource Module and Workflow Tools NC State University Libraries' Use Case

Xiaoyan Song
xsong9@ncsu.edu



NC State University and the Libraries

- Public university located in Raleigh, North Carolina
- Two main libraries and three branches
- Centralized library materials acquisition

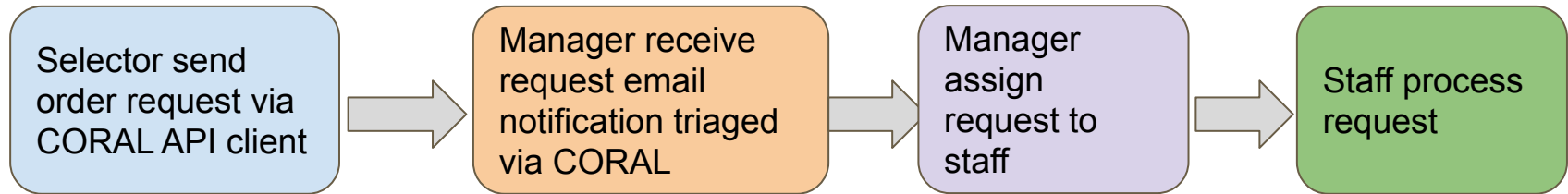


CORAL Use at Our Libraries

- Homegrown E-Matrix, main ERM tool, lack of workflow support
- Started CORAL implementation in 2013
 - On our own server
 - CORAL Resources module workflow tool
 - Support workflows in different units across multiple departments involved with selection, acquisition and discovery



General CORAL Acquisition Workflow



Managing Workflows in Resources Module

- prints/ebooks/streaming media/e-journal/databases acquisition
 - Placing hold for users or notifying users
 - Amazon requests
 - Direct vendor purchase
 - Ebook/streaming/e-journal one-time purchase
 - Reserves/ILL requests
- Other work distribution
 - ETD work distribution
 - Knowledgebase activation

API Client for Selectors

- Interface for selectors to enter purchase requests
- Basic bibliographic information
- Patron hold
- Library location
- Fund
- Other acquisition data (format and acquisition type) triggering specific workflow

Simple Resources module API client

Propose a resource

Monograph

Serial

[How to use the Monograph form](#)

Title: *

Author:

ISBN:

Publisher:

URL for purchasing site:

URL Alt:

Publication year:

Edition:

Hold location:

- No hold needed Hill Hunt Design NRL VML METRC ILL-Distance

Patron hold or notify (patrons' name, email)

Fund code:

Enter endowment funds and other funds not on the list in the Note field below.

unknown

Cost

\$

Urgent?

Format:

Media is only for DVDs and games. Select Electronic for streaming media.

Electronic

Acquisition Type:

- Approved
 Needs Approval

License required?

- Yes No Don't know

Existing license?

- Yes No Don't know

Library

J.B. Hunt

Home Location

Stacks

Notes

Include any additional information

The following fields are for collection managers' decision use.

C&RS ranking

High 

Subject coverage:

Audience:

Frequency and language:

Access via indexes:

Contributing Factors

Faculty/Patron Request(s):

Cluster Support:

Impact Factor/LJUR/ILLs:

Comparable Journals at NC State University Libraries:

Set up workflows in Admin

Home New Resource My Queue File Import Dashboards Admin

Administration

- Users
- Workflow / User Group**
- Access Method
- Acquisition Type
- Administering Site
- Alert Settings
- Alias Type
- Attachment Type
- Authentication Type
- Authorized Site
- Cataloging Status
- Cataloging Type
- Contact Role
- Cost Details
- Currency
- Downtime Type
- EBSCO Kb Config
- External Login Type
- Funds
- Import Configuration
- License Status
- Note Type
- Order Type
- Purchasing Site
- Resource Format
- Resource Type
- Storage Location
- Subjects
- User Limit

Workflow Setup +

Acquisition Type	Resource Format	Resource Type			
Basic Order	Electronic	Monographs			
Priority Order	Electronic	Monographs			
Basic Order	Print	Monographs			
Priority Order	Print	Monographs			
Basic Order	Media	Monographs			
Priority Order	Media	Monographs			
Open Access	Electronic	Monographs			
Any	Preservation	Preservation use			
One-Time Purchase	Electronic	Monographs			
Direct Order	Electronic	Continuing Resource			
Direct Order	Print+Electronic	Continuing Resource			
Direct Order	Print	Continuing Resource			
EBSCO Order	Electronic	Continuing Resource			
EBSCO Order	Print+Electronic	Continuing Resource			
EBSCO Order	Print	Continuing Resource			
One-Time Purchase	Electronic	Continuing Resource			
Open Access	Electronic	Continuing Resource			
One-Time Purchase	Print	Monographs			
Cataloging	Electronic	Monographs			
Ebook Reconciliation	Electronic	Monographs			
NCLIVE	Electronic	Continuing Resource			
Approved	Media	Monographs			
Approved	Print	Monographs			
Approved	Electronic	Monographs			
Approved	Electronic	Continuing Resource			

Edit Workflow

Edit Workflow

Resource Entry Requirements

Acquisition Type: Format: Type:

Workflow Steps

Name:	Approval/Notification Group:	Parent Step	
<input type="text"/>	<input type="text" value="Barbara Weinberg"/>	<input type="text"/>	<input type="button" value="Add"/>

↓	<input type="text" value="Acknowledge request"/>	<input type="text" value="Lisa Madden"/>	<input type="text"/>	✗
↑	<input type="text" value="Place order"/>	<input type="text" value="Lisa Madden"/>	<input type="text" value="Acknowledge request"/>	✗



Basic ebook workflow

↓	<input type="text" value="Initial Order Prep"/>	<input type="text" value="Serials Managers"/>	<input type="text"/>	✗
↑ ↓	<input type="text" value="Create order records"/>	<input type="text" value="Serials Staff"/>	<input type="text" value="Initial Order Prep"/>	✗
↑ ↓	<input type="text" value="Prep license for negotiation"/>	<input type="text" value="Serials Staff"/>	<input type="text" value="Initial Order Prep"/>	✗
↑ ↓	<input type="text" value="License negotiation"/>	<input type="text" value="License Team"/>	<input type="text" value="Prep license for negotiati"/>	✗
↑ ↓	<input type="text" value="Place order"/>	<input type="text" value="Serials Staff"/>	<input type="text" value="Create order records"/>	✗
↑ ↓	<input type="text" value="Obtain and pay invoice"/>	<input type="text" value="Serials Staff"/>	<input type="text" value="Place order"/>	✗
↑ ↓	<input type="text" value="Set up patron access"/>	<input type="text" value="Serials Staff"/>	<input type="text" value="Place order"/>	✗
↑ ↓	<input type="text" value="Catalog resource"/>	<input type="text" value="Serials Staff"/>	<input type="text" value="Set up patron access"/>	✗
↑ ↓	<input type="text" value="Verify patron access"/>	<input type="text" value="Serials Staff"/>	<input type="text" value="Catalog resource"/>	✗

Direct e-journal/database workflow

Users/User group

Use user group to send email notifications to multiple team members

Monographs Managers	xsong9@ncsu.edu, lkwhitte@ncsu.edu, lamadden@ncsu.edu	Lisa Madden Xiaoyan Song Lynn Whittenberger	 
OneTimePurchase_mono	lkwhitte@ncsu.edu xsong9@ncsu.edu, lamadden@ncsu.edu	Lisa Madden Xiaoyan Song Lynn Whittenberger	 

In a Nutshell

- Streamline selection and acquisition workflows across multiple departments in the libraries (over 10k requests since 2013)
- Support work distribution among staff members

Switch to Zoom for Group Discussion

Group Discussion

1. You'll receive an invitation to join one of the five breakout rooms. Select one and join it.
2. We'll use Jamboard for the breakout room discussion. The breakout room moderator will share the Jamboard link with you.
3. There are four same questions on each Jamboard. Each group will discuss these four questions.
4. 12:15-12:35 Breakout room discussion
5. 12:35-12:55 Big group sharing and discussion
6. Jamboard demo

Get involved with CORAL

- Sign up for Slack channel
 - Join the channel via direct link here:
https://join.slack.com/t/coral-erm/shared_invite/zt-18sg5go7r-rPoaFvllf0vdMtvf5Tey1A
 - If having trouble with the link above, fill out your information via this form to be added to the Slack channel: <https://forms.gle/ALRngWgUFfv28d5G6>
- Ask questions and help others on Slack
- Volunteer needed for CORAL Web Committee
- Steering Committee is looking for developers and e-resource librarians
- Join the Affiliate group if you are a service provider

Thank You