

Preparing a New License

New Order Being Worked in CORAL

1. Obtain an electronic copy of the license from the publisher. The format can be Word or PDF. (Word is preferred.)
2. Upload the license to the CORAL resource record under the "Attachments" tab.
3. Add the license to the New (To Be Picked Up) list of the [License Team Trello](#) board.
 - a. Click the "[Create from template](#)" icon in the lower right of the New (To Be Picked Up) list.
 - b. Select the appropriate template, either the License/Amendment Checklist Template for licenses and amendments, or the SERU Checklist Template for SERU agreements.
 - c. Add the appropriate label to the card (Licenses, Amendments, SERU)
 - d. You do not need to add a member to the card. The license team member who claims the license will do this.
4. Mark "Prep license" step in CORAL as complete. This will send a notification to the [License Team](#) listserv, notifying them that a new license is ready for negotiation.
5. After a member of the license team has claimed the "License negotiation" step in CORAL, the team member will request any email conversations you have had with the vendor.

New Order Not Being Worked in CORAL

1. Obtain an electronic copy of the license from the publisher. The format can be Word or PDF. (Word is preferred.)
2. Add the license to the New (To Be Picked Up) list of the [License Team Trello](#) board.
 - a. Create a new card for the license.
 - b. Add the License/Amendment Checklist Template for licenses and amendments, or add the SERU Checklist Template for SERU agreements. (Do not use a checklist from any other card as they are edited as the license team member works the license and may be missing some steps needed for other licenses.)
 - c. Add the appropriate label to the card (Licenses, Amendments, SERU)
 - d. You do not need to add a member to the card. The license team member who claims the license will do this.
3. Forward the license to the [License Team](#) listserv, notifying them that a new license is ready for negotiation.
4. After a member of the license team has claimed the license, the team member will request any email conversations you have had with the vendor.