

Webinar Agenda 

- Webinar Objectives
- Resource Renewals Tool
- Management Reports (Renewals)
- Alerts Overview
- Alert Criteria – Data fields/triggers
- 30 – 40 minutes



Objectives



- Provide ongoing education using targeted learning concepts that are delivered in digestible “bites”
- Refresh/reinforce key product functionality without getting too granular
- Raise awareness regarding product functionality, recent upgrades and/or enhancements
- Prompt libraries to take action, drive implementation & adoption and continuously improve

RENEWALS



Resource Renewals



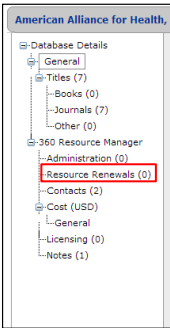
Resource Renewals Tool

- Facilitates task of managing renewals for electronic resource subscriptions
- Retrieve renewals information from a centralized tool/location
- Manage & streamline renewals workflow
- Alerts allow you to notify appropriate staff of upcoming renewals

Toolkit

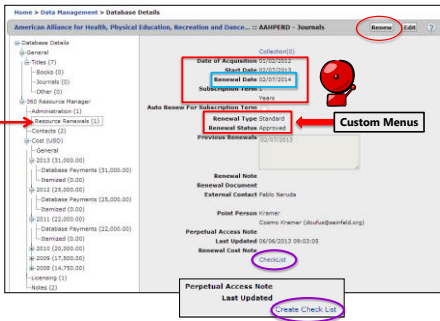
- Resource Renewals Alerts
- Renewals Checklist captures workflow steps and tracks to completion
- Management Reports

Resource Renewals

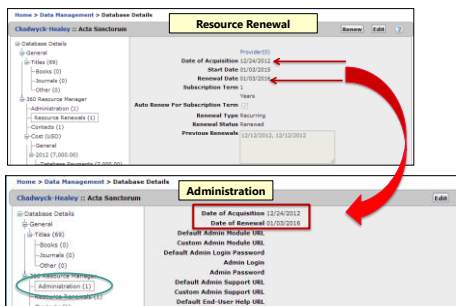


- Resource Renewals tool is located in left hand Navigation Panel
- Resource Renewals Tool is resource-specific and inherits down
- Renewals may be created at the Provider, Database or Title level

Resource Renewals Page



Renewal Dates and Administration



Resource Renewals Checklist Report



Renewal Name	Item	Status	Note
Emerald Human Resource Management	Get Renewal Price Quote	Checked	
Emerald Human Resource Management	Check Usage Stats and Record Cost/Use	Checked	
Emerald Human Resource Management	Send Renewal Form for Approval	Unchecked	
Emerald Human Resource Management	Get Renewal Approval	Unchecked	
Emerald Human Resource Management	Update ERM License Information	Unchecked	
Emerald Human Resource Management	Update ERM Cost/Payment Record	Unchecked	
Emerald Human Resource Management	Update Renewal in ERM	Unchecked	
Emerald Human Resource Management	Send Invoice to Acquisitions	Unchecked	
Emerald Human Resource Management	TEST	Unchecked	
Economics Working Papers in Oxford	Get Renewal Price Quote	Checked	scott completed
Economics Working Papers in Oxford	Check Usage Stats and Record Cost/Use	Checked	
Economics Working Papers in Oxford	Send Renewal Form for Approval	Unchecked	
Economics Working Papers in Oxford	Get Renewal Approval	Unchecked	
Economics Working Papers in Oxford	Update ERM License Information	Unchecked	
Economics Working Papers in Oxford	Update ERM Cost/Payment Record	Unchecked	
Economics Working Papers in Oxford	Update Renewal in ERM	Unchecked	
Economics Working Papers in Oxford	Send Invoice to Acquisitions	Unchecked	
Economics Working Papers in Oxford	TEST	Unchecked	
Psychology Journals	Get Renewal Price Quote	Checked	
Psychology Journals	Check Usage Stats and Record Cost/Use	Checked	
Psychology Journals	Send Renewal Form for Approval	Checked	
Psychology Journals	Get Renewal Approval	Checked	
Psychology Journals	Update ERM License Information	Checked	
Psychology Journals	Update ERM Cost/Payment Record	Checked	completed by Bob Meyers
Psychology Journals	Send Invoice to Acquisitions	Checked	

Note:

Send Invoice to Acquisitions

Note:

ALERTS

ProQuest

ERM Alerts



There are 7 Alerts in the ERM:

- Custom Status Alert
- Global Status Alert
- License Alert
- **Renewal Alert**
- Renewal Decision Date Alert
- Purchase Renewal Date Alert
- Termination Date Alert

Facts About Alerts 

- Useful tool to notify staff via email of changes to a resource status, upcoming license, resource or payment renewal dates
- Set an unlimited number of Alerts
- Alerts apply to *any subscribed-to electronic resource* in the Client Center
- Alerts must match to the specific criteria (data fields) in order to trigger an Alert email notification
- Alert creators must have Alert permissions set up; Recipients must be Client Center Accounts

Alerts Overview 

- **Custom Status Alert** • Resource Status Changes to a **Specific Value**
 - **Global Status Alert** • Resource Status Changes to **Any Value**
-
- **License Alert** • # Days Before License Advance Notice in Days (field) in License Details

Alerts Overview 

- **Renewal Alert** • "Renewal Date" field in Resource Renewal Tool
- **Renewal Decision Date Alert**
 - **Purchase Renewal Date Alert**
 - **Termination Date Alert**

- Fields in the Cost-Payment Record of a Resource:
 - "Renewal Decision Date"
 - "Purchase Renewal Date"
 - "Termination Date"

Status Alerts



Home > Alerts > Add Alert

Add Alert Save Cancel ?

Alert Name

Alert Status The alert is active when this box is checked

Alert Type

- Custom Status Alert - Alerts recipients when the status of any resource is changed to a particular value
- Global Status Alert - Alerts recipients when the status of any resource is changed to any value
- License - Alerts that applies to all Licenses globally at specified number of days before License Advance Notice date.
- Renewal Alert - Alerts recipients based on the Renewal Date field in the Resource Renewal Tool
- Renewal Decision Date Alert - Alerts recipients in advance of the date entered into the "Renewal Decision Date" field in a Payment Record
- Purchase Renewal Date Alert - Alerts recipients in advance of the date entered into the "Purchase Renewal Date" field in a Payment Record
- Termination Date Alert - Alerts recipients in advance of the date entered into the "Termination Date" field in a Payment Record

Send Alert Days before a license's advance notice date

Email Sender

Email Content

Send Alert When Resource Changes To Status To:

- Activated
- From Consortium
- Cancelled
- Complete Investigation
- Not Tracked
- Expired
- Forfeited
- Expired by Trial
- Single Content
- Subscribed
- Subscription Terminate
- Ready to Order
- Temporary Prohibition
- Time
- Under Review

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Status Alert Trigger



Custom Status Alert

- Resource Status changes to a specific value

Global Status Alert

- Resource Status changes to any value

Code R2Z

Provider

Topic

Status

Display In:

Under Review:

Not Tracked:

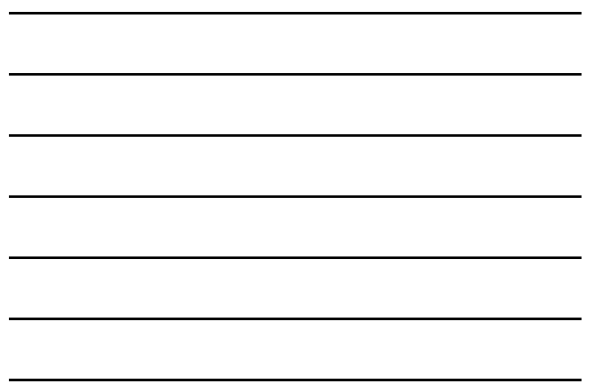
Default URL:

Custom URL:

Home > Data Management

Library Databases

Database Name	Check	Status	Index	Provider
AMFED Journals	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	American Alliance for Health, Physical Education, Recreation and Fitness (AAHPERF)
AMR Publications	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	Association for the Advancement of Medical Instrumentation
AMR Databases	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	Association for the Advancement of Medical Instrumentation
AMR Journal Complete	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	Association for the Advancement of Medical Instrumentation
Academic Earth	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	Academic Earth
Academic Journals	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO
Academic Search Complete	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO
ACS Journals - RSC	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	American Chemical Society
Acta Anatomica	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	Elsevier
Acta Anatomica Archives	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	Elsevier
Acta Anatomica Online	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	Elsevier
ADONIS	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	Elsevier
American History & Life with Full Text	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO
American Reference Archives	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO
Pharmaceutical Information	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO
Pharmaceutical Information (H.W. Wilson)	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO
Art Index International (International)	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO
Art Process Image Gallery	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO
Art & Architecture Index - eJournals	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO
Biography Index International: 1940-1993 (H.W. Wilson)	<input checked="" type="checkbox"/>	Subscribed	<input checked="" type="checkbox"/>	EBSCO



License Alert



Home > Alerts > Add Alert

Add Alert Save Cancel ?

Alert Name

Alert Status The alert is active when this box is checked

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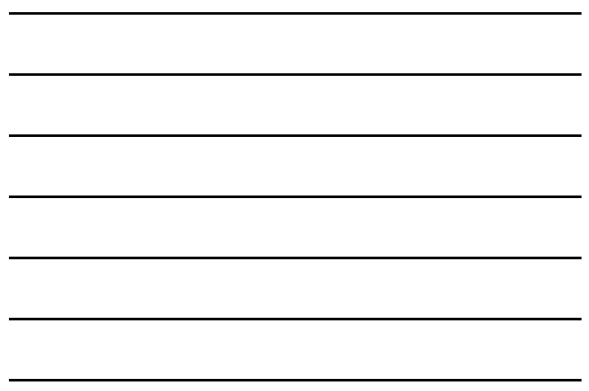
Send Alert Days before a license's advance notice date

Email Sender

Email Content

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License Alert Trigger



- A License Alert is tied to a license vendor's **Advance Notice Date** (# days the vendor requires you to notify them of your intention to renew the license) and the **End Date**

Renewal Decision, Purchase and Termination Alerts



- Renewal (Resource)
- Renewal Decision Date
- Purchase Renewal Date Alert
- Termination Date Alert

Alert Triggers



A Renewal Alert (1) is triggered by the Renewal Date in the Resource Renewals Tool.

The other 3 Renewal Alerts are triggered by specific fields/dates entered in the resource Cost/Payment page:

- Renewal Decision Date
- Purchase Renewal Date
- Termination Date

Create an Alert



Home > Alerts > Alerts

Alert Name: 30 days to Renewal Save Cancel

Alert Status: The alert is active when this box is checked

Alert Type:

- Custom Status Alert - Alerts recipients when the status of any resource is changed to a particular value
- Global Status Alert - Alerts recipients when the status of any resource is changed to any value
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- Termination Date Alert - Alerts recipients in advance of the date entered into the Termination Date field in a Payment Record

Send Alert: 30 Days before Date of Renewal

Email Sender: Scott Shull (Scott.Shull@serialsolutions.com)

Email Content: This resource renews in 30 days. Begin the checklist.

Status: Add



Attach Recipients



- Think of attaching recipients to an Alert in a similar way you attach resources to Contacts, Licenses, Notes, etc.

Home > Alerts > Alert Details

30 days to Renewal Save Cancel

Name	Email
Robin Cameron	robin.cameron@serialsolutions.com
Scott Shull	Scott.Shull@serialsolutions.com

Name	Email	Attach	Remove
Barney Rubble	barney@rubble.edu		
Rocky Ricardo	rrocky@werner.tv		
Marsha Brady	marshabradys@brady.com		

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Alert Email



To: Quinn, Bob
Subject: Renewal Alert

Serials Solutions Alert
Alert Name: Renewal Alerts
Alert Type: Renewal

This is a reminder that the date of renewal for Health & Psychosocial Instruments (HAPI) is 2013-02-24

This resource renews in 30 days. Begin the checklist.
The link that triggered this alert may be accessed in Center Alert at:
<http://66794.1.degas.serialsolutions.com/CC/Library/DateManagement/Database/ERMS/Database/rmfRenewals.aspx?LibraryCode=11&ObjectID=107&LibraryDatabaseID=667842>

Resource name appears in the Alert email.

Email Content (when Alert was created)

Email Content: This resource renews in 30 days. Begin the checklist.



Support Center Documentation



- [360 Resource Manager User's Guide](#) - #7401
- [Renewals](#) - #7393
- [Renewal Checklist](#) - #7389
- [Alerts](#) - #7345
- [Management Reports](#) - #7337



THANK YOU!

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