ProQuest.com

ProQuest

START HERE.

Scott Shull
Sr. Training and Consulting Partner
Customer Experience West/PQWS

scott.shull@proquest.com

360 RESOURCE MANAGER
- - -
RENEWALS AND ALERTS

Public Webinar

January 2015

ProQuest

Webinar Agenda

ProQuest

- 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

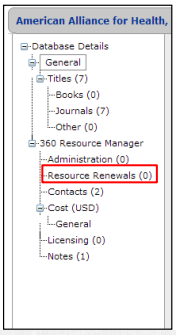
Resource Renewals Tool

- 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

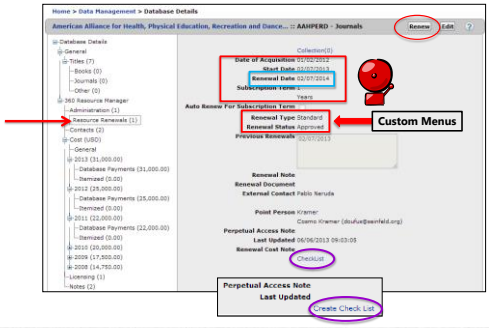
- Resource Renewals Alerts
- Renewals Checklist captures workflow steps and tracks to completion
- Management Reports

Resource Renewals

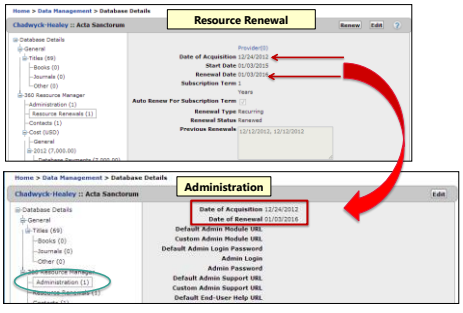


- Resource Renewals tool is located in left hand Navigation Panel
- Resource Renewals Tool is resource-specific and inherits down
- Renewals may be created at the Provider, Database or Title level

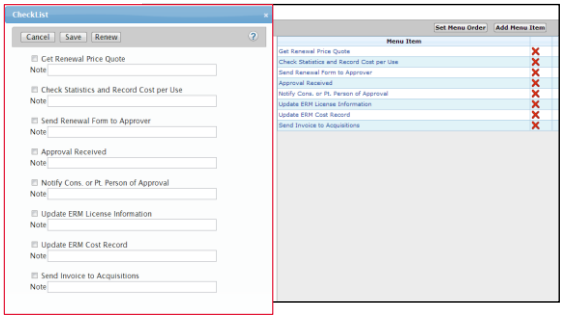
Resource Renewals Page



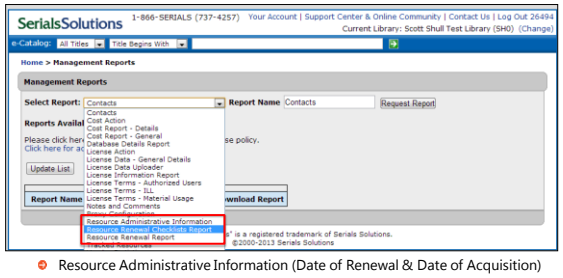
Renewal Dates and Administration



Renewals Checklist



Management Reports/Renewals



- Resource Administrative Information (Date of Renewal & Date of Acquisition)
- Resource Renewal Checklist Report
- Resource Renewal Report

Resource Renewals Report

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 Meyeres
Psychology Journals	Send Invoice to Acquisitions	Checked	

Note:

Send Invoice to Acquisitions

Note:

ALERTS

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

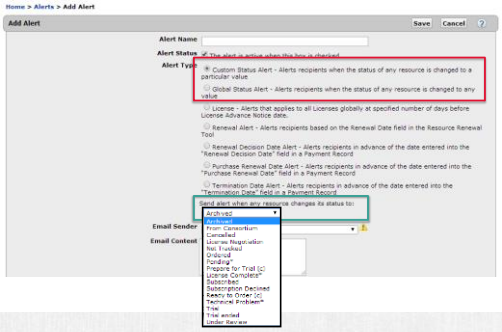
Alerts Overview

- **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



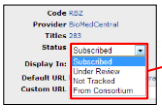
Status Alert Trigger

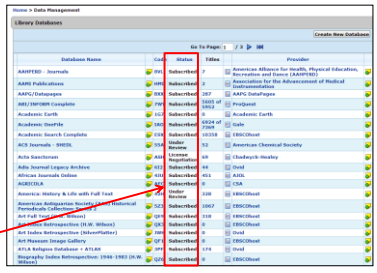
Custom Status Alert

- Resource Status changes to a *specific value*

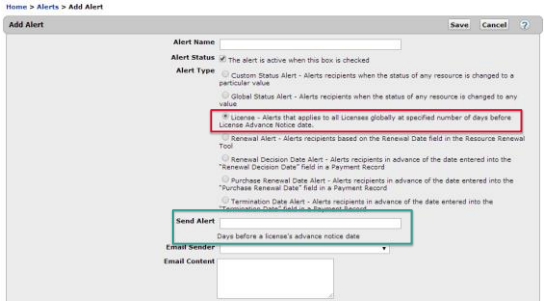
Global Status Alert

- Resource Status changes to *any value*



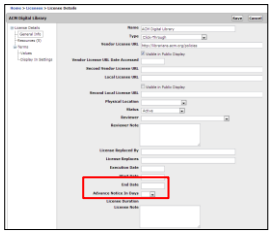


License Alert



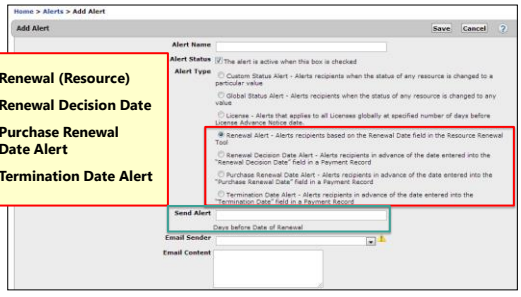
License Alert Trigger

- 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**

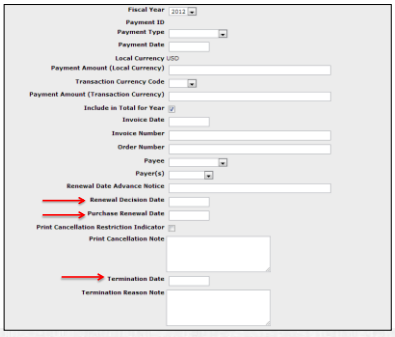


Alert Triggers

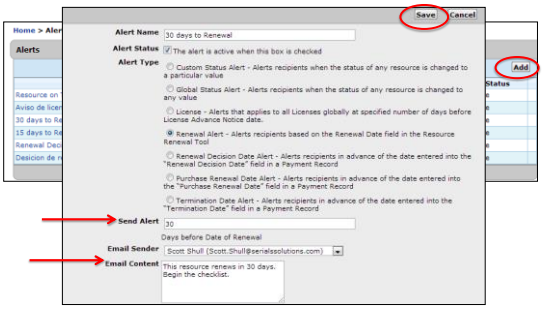
A **Renewal Alert (1)** is triggered by the Renewal Date in the Resource Renewals Tool.

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**

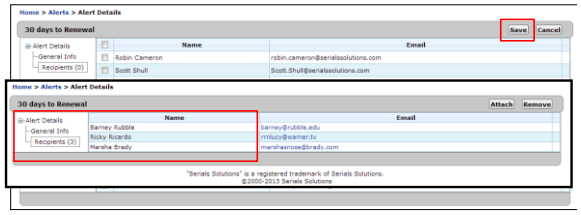


Create an Alert

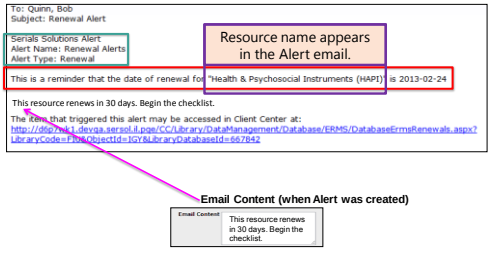


Attach Recipients

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



Alert Email



Support Center Documentation

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

THANK YOU!

Scott Shull
Sr. Training and Consulting Partner
Customer Experience West/PQWS