

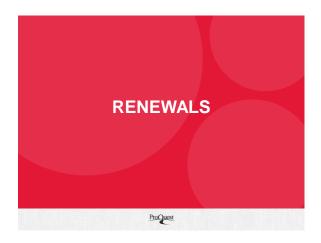


- · Webinar Objectives
- · Resource Renewals Tool
- · Management Reports (Renewals)
- · Alerts Overview
- · Alert Criteria Data fields/triggers
- · 30 40 minutes

Objectives

ProQuest

- 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



Resource Renewals

ProQuest

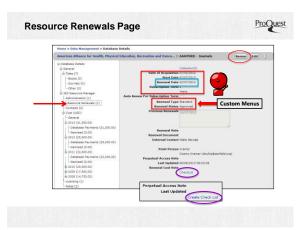
Resource Renewals Tool

- · 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

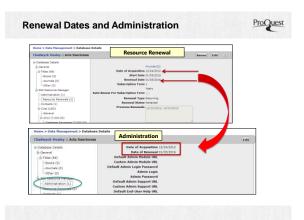
Toolkit

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

Resource Ren	
Orbabase Details Orba	 Resource Renewals tool is located in left hand Navigation Panel Resource Renewals Tool is resource- specific and inherits down
Contacts (2) Cost (USD) General Licensing (0)	Renewals may be created at the Provider Database or Title level









Renewals Checklist

ProQuest

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		Get Renewal Price Quote		×
Get Renewal Price Quote		Check Statistics and Record Cost per Use		×
Note		Send Renewal Form to Approver		×
Check Statistics and Record Cost per Use		Approval Received		XXXXXX
		Notify Cons. or Pt. Person of Approval		×
Note		Update ERM License Information		×
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Resource Renewal Checklist Report

Resource Renewal Report

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Resource Renewals Checklist Report

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	10	Get Renewal Price Quote	Checked	
merald Human Resource Managemi	nt	Check Usage Stats and Record Cost/Use	Checked	
merald Human Resource Manageme	nt	Send Renewal Form for Approval	Unchecked	
merald Human Resource Manageme	nt	Get Renewal Approval	Unchecked	
merald Human Resource Manageme	nt	Update ERM License Information	Unchecked	
merald Human Resource Manageme	nt	Update ERM Cost/Payment Record	Unchecked	
imerald Human Resource Manageme	nt	Update Renewal in ERM	Unchecked	
Emerald Human Resource Management		Send Involce to Acquisitions	Unchecked	
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conomics Working Papers in Oxford		Get Renewal Price Quote	Checked	scatt completed
conomics Working Papers in Oxford		Check Usage Stats and Record Cost/Use	Checked	
conomics Working Papers in Oxford		Send Renewal Form for Approval	Unchecked	
conomics Working Papers in Oxford		Get Renewal Approval	Unchecked	
conomics Working Papers in Oxford		Update ERM License Information	Unchecked	
conomics Working Papers in Oxford		Update ERM Cost/Payment Record	Unchecked	
conomics Working Papers in Oxford		Update Renewal in ERM	Unchecked	
conomics Working Papers in Oxford		Send Involce to Acquisitions	Unchecked	
conomics Working Papers in Oxford		TEST	Unchecked	
sychology journals		Get Renewal Price Quote	Checked	
sychology Journals		Check Usage Stats and Record Cost/Use	Checked	
sychology Journals		Send Renewal Form for Approval	Checked	
sychology Journals		Get Renewal Approval	Checked	
Psychology Journals		Update ERM License Information	Checked	
sychology Journals		Update ERM Cost/Payment Record	Checked	completed by Bob Meyere
sychology Journals		Send Invoice to Acquisitions	Checked	
	Note			
	E Se	ad Invoice to Acquisitions		
	Note			



ERM Alerts

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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

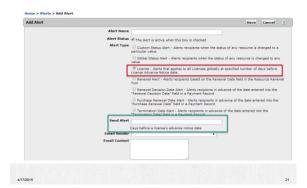
Alerts Overview	ProQuest
Custom Status Alert	Resource Status Changes to a Specific Value
• Global Status Alert	Resource Status Changes to Any Value
License Alert	 # Days Before License Advance Notice in Days (field) in License Details



ProQuest **Status Alerts** Home > Alerts > Add Alert Add Alert Save Cancel ? Alert Status Custom Bitatus 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. icense - Alerts that applies to all Licenses globally at sp rse Advance Notice date. Renewal Alert - Alerts reci Renewal Decision Date Alert - Alerts recipients in advance of the Renewal Decision Date" field in a Payment Record Purchase Renewal Date Alert - Alerts recipients in adv Purchase Renewal Date" field in a Payment Record hase Reneme vous primination Date Alert - Alerts recipients in advan-mention Date" field in a Payment Record -Your when any resource changes its status to: ived n Consortium Archevel Yrom Convertiem Censelled License Negotiation Not Trucked Proper for Trial (c) License Complete" Bubscription Declined Resolution Order (c) Subscription Declined Trial and did 4/17/2015

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License Alert

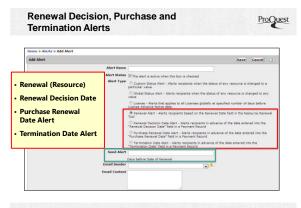


License Alert Trigger

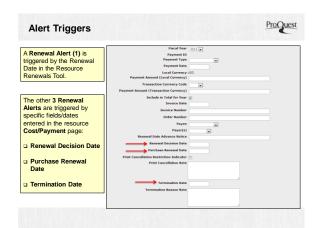
ProQuest

 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

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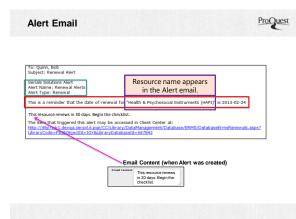
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Aviso de licer		O License - Alerts that applies to all Licenses globally at specified number of days before	e
30 days to Re		License Advance Notice date.	•
15 days to Re Renewal Deci		Renewal Alert - Alerts recipients based on the Renewal Date field in the Resource Renewal Tool	
Desicion de n		Renewal Decision Date Alert - Alerts recipients in advance of the date entered into the "Renewal Decision Date" field in a Payment Record	
		$\overset{\odot}{\to}$ 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	30	
		Days before Date of Renewal	
	Email Sender	Scott Shull (Scott.Shull@serialssolutions.com)	
	Email Content	This resource renews in 30 days. Begin the checklist.	

Attach Recipients

ProQuest

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

30 days to Renev	/al				Save Car
8-Alert Details	-63	Name		Email	
-General Info	13	Robin Cameron	robin.cameron@serialssolutions.com	robin.cameron@serialssolutions.com	
Recipients (0)	15	Scott Shull	Scott.Shull@serialssolutions.com		
0 days to Renewa		Name		Email	Attach Remove
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			barney@rubble.edu rmlucy@wamer.tv		
	marsha	Dredy	marshasnose@brady.com		
		"Serials Solutions" is a	- registered trademark of Serials Solutions. 20-2013 Serials Solutions		



Support Center Documentation

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

