



Webinar Agenda

4/17/2015

ProQuest

- Webinar Objectives
- Adding Costs Manually
- Cost Payment Menu Manager
- Batch Uploads/Cost Data Uploader
- Management Reports for Costs
- Support Center Documentation

Webinar Objectives

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- Deliver foundational concepts in smaller, digestible "bites"
- Refresh/reinforce key points & functionality without getting too granular
- Provide ongoing education regarding recent upgrades and/or enhancements (as appropriate)
- Prompt libraries to take action or continue to implement their ERM

Cost Payment Basics

4/17/2015

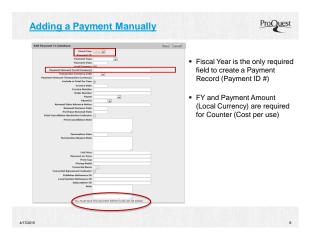
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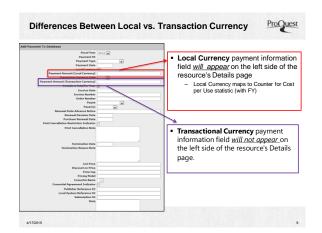
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- Adding Costs to ERM let's you:
 - Payment tracking; keeping e-Resource fiscal information in a centralized location
 - Use for 360 Counter Cost per Use (CPU) metric
 - Track Fund Accounts and Amounts
 - At-a-glance visibility to year-over-year costs in Navigation Panel of a resource
- Cost can be added at Collection, Provider, Database or Journal Level
- Add Cost/Payments manually or use the Cost Data Uploader to upload costs in batches (usually at the journal/title level)
- Add past FY cost information (back to 2000) or add future costs through 2024



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Fund Names and Amounts

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- May be attached to costs at Journal or Database level
 - Funds do not inherit!

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- If you want to see cost per use in a 360 Counter report (JR1), you have to add the Fund Name(s) at the Journal level
- Cost must be added first to "activate" the Fund tool
- Fund Accounts may or may not have a dollar figure; may be greater or less than payment amount
- Fund Accounts are often subject headings (e.g. 'chemistry Selector' or 'Social Sciences.')
 Many clients also have funds that correspond with accounting or budgets, which are kept in their ILS or a separate university system
- Fund Names / Amounts are included the Cost Data Uploader templates

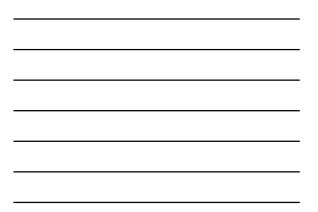
Applying Fund Names to Cost/Payment

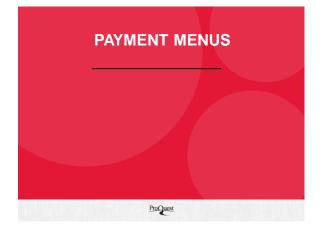
ProQuest

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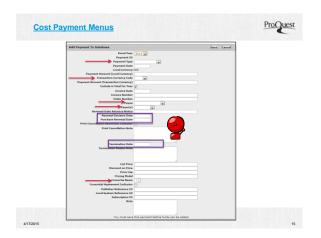
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Menu Manager

ProQuest

Management Tools	
Data Summary	Licenses
Collections	Notes
Menus	Cost Data Upload
Alerts	Vendor Statistics Metadata
Contacts	Knowledgebase Notifications
Data Management	
Business Intelligence Tools	
360 Usage Statistics	Intota Assessment
Overlap Analysis	COUNTER Configuration
Data On Demand	Ulrichsweb Usage Statistics
Management Reports	Ulrich's Serials Analysis System

Cost/Payment	Menu Manager
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ProQuest

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Home > Menus Payment Consortium Menus <u></u>.c₀ tact Menus ment Menu ayment Menus Payment Consortium Menu Payment Payee Menu Payment Payer Menu Payment Type Menu Transaction Current cense Menus Resource Menus

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5 Payment Menus allow you to customize the ERM Cost/Payment tool with local terms specific to your workflow:

- Payment Consortium Menu * (Consortium Name)
- Payment Payee Menu (e.g. Vendors) *
- Payment Payer Menu (Staff member) *
- Payment Type *
- Transaction Currency Code (Default in Library Settings "Local Currency")

* These 4 Menus are empty by default.



ost Data Uploader		ProQu
Manage Your Data Cest Data Uploader		
Dete Summary Collections Menus Alarts Contacta Data Management	Licenses Notes Cost Data Upload Vendor Statistics Metadata Knowledgebase Notifications	
Business Intelligence Tools		
360 Usage Statistics Overlap Analysis Data On Demand Management Reports	Intota Assessment COUNTER Configuration Ulrichsweb Usage Statistics Ulrich's Seniet Analysis System	

Adding Costs via the Cost Data Uploader Uploader is most useful if you have a lot of fiscal information at journal level

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Home > Cost Data Uploa	1								
Cost Data Upload									2 Cancel
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2. Download the Titles/Save

4/17/2015

- 3. Enter cost data on the (template) spreadsheet
- 4. Upload back into Serials Solutions

Provider Name	Provider Code		Database Code	Title	Title Id	ISSN .	ISBN	5510	Fiscal Year	Use Itemized Total	Payment	Payment Type	Payment	Payment Amount (Local Currency)	Transaction Currency Code
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		ACS Journals - CRKN	V69												
		American Library Association	R.AL												
		Biology E-Books Online, Collection 21	"A3												
			6A												
		Business Source Elite	202												
		Ebook Library	AZZ												
		Ebrary Aerospace Corporate Collecti	A47												
		ebrary Perpetual Access, PDA and ST	UU.												
		Ecological Society of America Public	RSZ												
		eUbrary Curriculum	BCU												
		Emerald Human Resource Manageme	TDO												
		Emerald Journals	GEI												
		JSTOR eBooks History	E9.												
		Military & Security Assessments Inte	687												
		Nature Journals Online	RNT												
		Nature Journals Online(CALIS Mirror	-88												
		Nature Publishing Group: Jisc Collect	ADQMX												
		Oxford Art Online	BWG												
		Oxford Business Group Publications						_							
		Zoology Online	W14												



Upload the Cost Data

ProQuest

iest Data Upload						
						Car
	File to Download:	Template with	All Cost Fields		• Download	
	File To Upload:	Choose File	No file chosen		Accept File	
The Upload Status						Ratesh
File		Errors	Warnings	Status	Upload Date	Total Rows Processed
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Science Eng Society Costs.txt		0	0	Successful	10/15/2013 9:17:42 AM	29
Scott Journals Template. Costs.Oct15.txt		364	0	Failure	10/15/2013 9:11:43 AM	0
Scott Journals Template. Costs. Oct15.txt		364	0	Failure	10/15/2013 9:05:26 AM	364
Shull Journals Template.Costs.Oct14.bit		364	0	Failure	10/14/2013 3:48:22 PM	364
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megafile.2011 cost overwrite.txt		0	0	Successful	8/23/2013 3:33:27 PM	2
megafile.2011 cost overwrite.txt		0	25	Successful	6/23/2013 9:42:10 AM	2
megafile costs2011only.OVERWRITE.txt		0	25	Successful	6/23/2013 9:18:16 AM	2
megafile costs2011only.bd		0	25	Successful	8/23/2013 9:15:49 AM	2

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Cost Data Template Explanations

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Column Letter	Column Header	Description	Optional/Required Field	Note
A	Collection Name	Name of the Collection to which payment information is being added	Optional	
8	Collection Id	Unique Serials Solutions ID. Assigned by the system.	Required if Collection Name is included and coat for Collection is to be uploaded	At least one resource match point is required in order for the report to upload successfully. For example, including a Collection ID
c	Provider Name	Name of the Provider to which payment information is added. This field will appear if payment information has been added at the Provider, Database, or Title level.	Optional	
•	Provider Code	Unique Serials Solutions ID. Assigned by the system.	Required if Provider Name is included and cost for Provider is to be uploaded	
e)	Database Name	Name of the Database to which payment information is added. This field will appear if payment information has been added at the Database or Title level. If populated, the Custom Database Name will appear.	Optional	
6	Database Code	Unique Serials Solutions ID. Assigned by the system.	Required if Database or Title Nerre is included and cost for Database or Title is to be uploaded	
G C	Title Name	Name of the Title to which payment information has been added.	Optional	
н	Title Id	Unique Serials Solutions ID. Assigned by the system.	Required if Title Name is included and cost for Title is to be uploaded	
	ISSN	International Standard Serial Number	Will be blank for books	
10 - 1	ISBN	International Standard Book Number	Will be blank for journals	
ĸ	\$51D	Unique Serials Solutions ID. Assigned by the system.	Required if Title Name is included	

Search "Cost Data Upload" to find SC Answer.

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Cost & Usage Data Upload Schedule



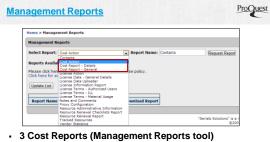
As of July 2014, ProQuest changed the timeframe for inputting or uploading cost and fund account data:

- Cost Data in 360RM is captured weekly, every Monday at 7:00p Eastern Time
- Data entered by clients before Monday, 7:00p EST will be available in Intota
 Assessment Counter Reports by Friday at 6:00p Eastern Time

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Added		7	8	Available	10	11
before 7:00p EST	Added afte 7:00p EST	r Monday		6:00p EST		>
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4/17/2015

- Costs Action
 Cost Report Details
 Cost Report General

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		Provider Code	SSID	Paymer#Date
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Find Topics : Cotts	In : All Products	• SEARCI
Search Results: 360 Resource Manager harrow your sea	All Products 360 Services 360 Consortum Edition 360 Counter 360 Counter 360 Link 360 MARC Updates	
Search Results: 360 Resource Manager Narrow your sea Showing 1 - 10 of 46 results 360 Resource Manager: Migrating Costs Between Databases	360 Resource Manager 360 Search eJournal portal Aqua@rowser Boxier Library	
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