

Webinar Agenda 

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

Webinar Objectives 

- 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


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Cost Payment Basics 


- **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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ADDING COSTS MANUALLY



Payment ID



Home > Data Management > Database Details

ProQuest > International Index to Music Periodicals (IIMP) Full Text

Invoice Number	Payment Date	Payee	Payment Type	Payment	Include in Total
1134587				30,000.00	<input checked="" type="checkbox"/>
Total				30,000.00	30,000.00

- Once you've saved your payment information, a Payment ID number is created.
- Click on the Payment ID to reopen the Cost/Payment record to make edits, add data or add Fund Names.

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Fund Names and Amounts



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

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Applying Fund Names to Cost/Payment



ProQuest > International Index to Music Periodicals (IIMP) Full Text

Payment ID: 1134587

Invoice Number: 1134587

Payment Date: [Empty]

Payee: [Empty]

Payment Type: [Empty]

Payment: [Empty]

Include in Total:

Invoice Status: [Empty]

Invoice Number: [Empty]

Order Number: [Empty]

Payment: [Empty]

Renewal Date Advance Notice: [Empty]

Renewal Payment Date: [Empty]

Package Renewal Status: [Empty]

Print Circulation Information: [Empty]

Supplier: [Empty]

Special Circulation Note: [Empty]

Renewal Status: [Empty]

Renewal Reason Note: [Empty]

Last Price: [Empty]

Discount on Price: [Empty]

Price Cap: [Empty]

Printing Method: [Empty]

Contract Name: [Empty]

Contract Agreement Indicator: [Empty]

Publisher Reference ID: [Empty]

Local Invoice Reference ID: [Empty]

Subscription ID: [Empty]

Note: [Empty]

- Click EDIT, then click scroll to Bottom of Page/ Click Add
- The Fund Names are added manually to the cost record for a fiscal year.
- The Fund tool does not compare the Fund Amount Total to the Payment Amount. Funds and Cost/Payments are separate.

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Menu Manager



Manage Your Data	
Management Tools	
Data Summary	Licenses
Collections	Notes
Menu	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	Ulrichweb Usage Statistics
Management Reports	Ulrich's Serials Analysis System

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Cost/Payment Menu Manager



Home > Menus	
Payment Consortium Menu	
Menu	
Contact Menu	
Payment Menu	
Payment Consortium Menu	
Payment Payee Menu	
Payment Payer Menu	
Payment Type Menu	
Transaction Currency Code	
License Menu	
Note Menu	
Resource Renewals	
Resource Menu	

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.

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COST DATA UPLOADERS

Upload the Cost Data



File Upload Status	File	Errors	Warnings	Status	Upload Date	Total Rows Processed
	Collection Cost Template.doc	0	0	Failure	1/7/2014 1:10:01 PM	0
	Collection Cost Template.doc	0	0	Failure	1/7/2014 1:10:01 PM	0
	VIGNCOST.doc	11	0	Failure	1/7/2014 1:10:01 PM	0
	ISD-OTC-Template.doc	0	0	Failure	1/7/2014 1:10:01 PM	0
	Science Eng Society Costs.doc	1	0	Failure	12/18/2013 3:58:05 PM	28
	Science Eng Society Costs.doc	0	0	Successful	10/16/2013 9:11:42 AM	28
	South Journals Template Costs-0013.doc	364	0	Failure	10/16/2013 9:11:43 AM	0
	South Journals Template Costs-0013.doc	364	0	Failure	10/16/2013 9:15:26 AM	364
	South Journals Template Costs-0014.doc	364	0	Failure	10/16/2013 9:18:23 PM	364
	Shelburne Press Titles Costs.doc	0	0	Successful	10/16/2013 3:18:47 PM	260
	megafila 2011 cost overview.doc	0	0	Successful	6/22/2013 2:32:07 PM	2
	megafila 2011 cost overview.doc	0	0	Successful	6/22/2013 9:42:10 AM	2
	megafila 2011 cost overview.doc	0	0	Successful	6/22/2013 9:42:10 AM	2
	megafila 2011 cost overview.doc	0	0	Successful	6/22/2013 9:42:10 AM	2

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Cost Data Template Explanations



Cost Data Upload Template / Cost Report - Details: Explanation of the Column Headers

Column Letter	Column Header	Description	Optional/Required Field	Note
A	Collection Name	Name of the Collection to which payment information is being added.	Optional	
B	Collection ID	Unique Serials Solutions ID. Assigned by the system.	Required if Collection Name is included and used for Collection to be uploaded.	At least one resource match point is required in order for the report to collect 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 in the Provider, Contributor, or Title level.	Optional	
D	Provider Code	Unique Serials Solutions ID. Assigned by the system.	Required if Provider Name is included and used for Provider 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 in the Database or Title level. If provided, the Custom Database Name will appear.	Optional	
F	Database Code	Unique Serials Solutions ID. Assigned by the system.	Required if Database or Title Name is included and used for Database or Title to be uploaded.	
G	Title Name	Name of the Title to which payment information has been added.	Optional	
H	Title ID	Unique Serials Solutions ID. Assigned by the system.	Required if Title Name is included and used for Title to be uploaded.	
I	ISBN	International Standard Book Number	Will be blank for books	
J	ISSN	International Standard Book Number	Will be blank for journals	
K	ISSC	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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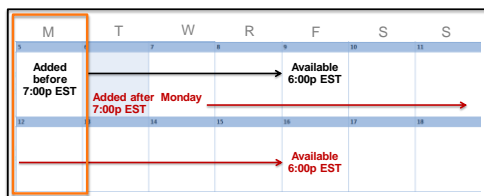
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Cost & Usage Data Upload Schedule



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

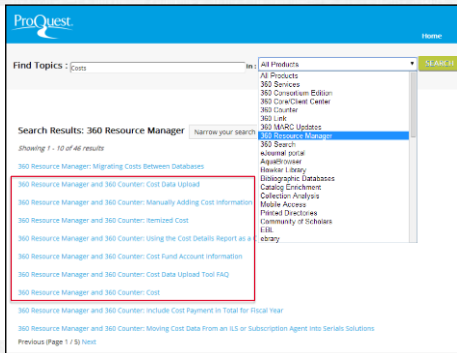


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SUPPORT CENTER DOCUMENTATION



Support Center Documentation



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THANK YOU!!

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