



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

ProQuest

- 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

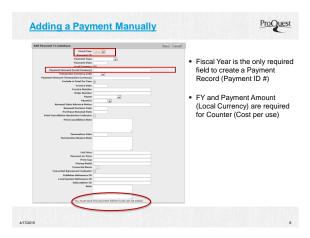
4/17/201

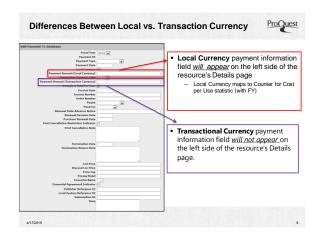
ProQuest

- 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



fome > Data Management > Database	Details			
ProQuest :: International Index to M	tusic Periodicals (IIMP) Full T	ext		?
G-Database Datails			Edit Use Itemized Total	Add Paymen
H-General	Fiscal Year	Cost		Itemized Total
Books (0)	2013	30,000.00	0.00	
-Journals (0)	2012	25,000.00	0.00	
Other (0)	2011	20,000.00	0.00	
B-360 Resource Nanager	2010	20,000.00	0.00	
-Administration (0)	2009	0.00	9,000.00	1
÷2012 (25,000.00)	year-over-yea			







roQuest = International Index to Hu	sic Periodicals (IIMP)) Full Text					Add Payme
Database Datals	2011						
General	Payment Id	Invoke Namber	Payment Date	Payee	Payment Type	Payment	Include In Total
Triles (179)	1324587					30,000,00	4
-Booka (0)	Total					30.000.00	30.000.0
-Journals (0)							
- Other (0)							
-260 Resource Manager							
-Administration (0)							
-Resource Renewals (0)							
- Contacta (0)							
- Contacta (0) - Cost (USD)	• Once	vou've sa	aved your n	avmenti	information	a Pavme	ent ID
- Contacta (0) Cost (USD) - General				aymenti	information	, a Payme	ent ID
- Contacts (0) - Cost (USD) - General - 2013 (30.000.00)		you've sa		aymenti	information	, a Payme	ent ID
- Contacta (0) - Cost (USD) - General (= 2013 (30.000.00) - Database Paymenta (30.000.00)				aymenti	information	, a Payme	ent ID
- Contacts (0) - Cost (USD) - Desneral - 2013 (30.000.00) - Distasse Payments (30.000.00) - Iterized (0.00)				aymenti	information	, a Payme	ent ID
- Contacts (0) - Contacts (0) - General - Deneral - Detabase Payments (30,000,00) - Detabase Payments (30,000,00) - Deneral (0,00) - Deta (25,000,00)	numbe	er is crea	ted.				
Centacts (0) Centacts (0) Centact (UEO) Centact (0) Centact (0) C	numbe	er is crea	ted.				
Contacts (0) Cont (UEO) - General - Detabase Payments (30,000,00) - Itemize (0,00) - Detabase Payments (25,000,00) - Detabase Payments (25,000,00) - Itemize (25,000,00)	numbe	er is creaton the Pa	ted. syment ID to	o reopen	the Cost/P		
- Contacts (0) - Cat (USD) - Cat (USD) - Cat (S3 (30.000.00) - Cat (25.000.00) - Cat	numbe	er is creaton the Pa	ted. syment ID to	o reopen	the Cost/P		
-constate (6) -case (us0) -batabase Reyments (50.000.00) -batabase Reyments (50.000.00) -batabase Reyments (25.000.00) -batabase Reyments (25.000.00) -batabase Reyments (25.000.00) -batabase Reyments (20.000.00)	numbe	er is creaton the Pa	ted.	o reopen	the Cost/P		
-centesta (0) - Cast (200) - Gear (200) - Gear (200) - Cast (200) -	numbe	er is creaton the Pa	ted. syment ID to	o reopen	the Cost/P		
-Contuits (c) -Cast (UD) -Stat (UD) -Stat (S00,000) -Beaks Farments (20,000,00) -Beaks (20,00	numbe	er is creaton the Pa	ted. syment ID to	o reopen	the Cost/P		
-Contact (0) -Cast (100) -Cast (100) -Cast (100) -Database Permenta (2000.00) -Database Per	numbe	er is creaton the Pa	ted. syment ID to	o reopen	the Cost/P		
-Contuits (c) -Cast (UD) -Stat (UD) -Stat (S00,000) -Beaks Farments (20,000,00) -Beaks (20,00	numbe	er is creaton the Pa	ted. syment ID to	o reopen	the Cost/P		

Fund Names and Amounts

ProQuest

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

4/17/2015

4/17/2015

4/17/2015

- 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

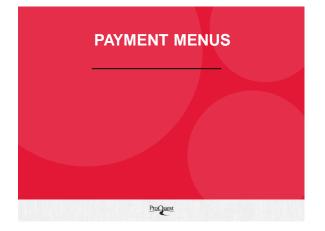
ProQuest

11

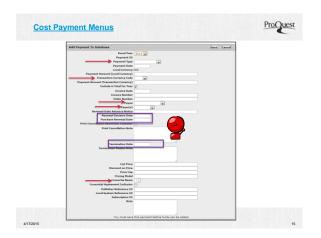
Producet I: International Index to Num © Calcareat © Trider (171) -Tournal (0) -Other (0) -Annamation (0)	er Presidecies (1999) Fair Leat Fried Year 2013 Payment Die 20140 Payment Date Local Conversity 2000 Transaction Conversity 20,000.00 Transaction Conversity Code Payment Annount (Local Conversity) 20,000.00 Fairmant Annount (Local Conversity) 20,000.00	Click EDIT, then click scroll to Bottom of Page/ Click Add
-Report Provide (0) -Contrain (0) -Contrain (0) -Contrain (0) -Contrain (0) -Contrain (0) -Contrain Provide (0) -Contrain Provide (0)	Include to Total (for Year ()) Kensick Dark Drevices Marsher Drevices Marsher Payses Payses Received Dark Advisures (Notes C) Received Darks Marsher Parchase Marsher () Period Cascillation Mark Termanico Mar	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.
- 1000000 (0.000) + 2010 (0.000,000) + 2010 (0.000,00) + 2010 (0.000,00) - 40000 (0)	Temmination Reason Sole Liab Proc Diseased on Price Price Cap Consecution Conference on Cap Publisher Reference ID Local System Enformers ID Solecorption ID Note	

	book Library = Ebook Library			Save Carvel	
	Ostabase Details	Final Year			
	Oeneral	Payment 1D :	106067		
	- T(des (428828)	Payment Type			
	- Basis (8)	Payment Date			
	-Journels (0)	Local Currency			
	Other (D)	Payment Amount (Local Carrency)			
	-Shatta	Transaction Currency Code			
	- 363 Resource Manager	Peyment Annual (Transaction Corrency)			
	-Administration (0)	Include in Total for Year			
	-Tannung Tanguala (2)	Involve Date			
	-Castada (2)	Invoice Number			
	G-Cest (USD)	Order Nander			
	General	Payee	•		
	2014 (320,000,00)	Payar(4)			
	- Database Payments (120.000.00)	Renewal Date Advance Notice			
	Demiged (0.00)	Renewal Decision Date			
	- Usensing (0)	Purchase Renewal Date			
	Coarding (0)	Print Cancellation Restriction Indicator Print Cancellation Note			
		Termination Reason Note			
		Link Price	6		
		Discount on Price			
		Price Cap			
		Pricing Nodel			
		Consortia Name	•		
		Concertial Agreement Inductor			
		Publisher Reference 1D			
		Local System Reference 1D			
		Subscription 1D			
		Note			
Add		×	Faul Name	Fund Amount	
Fund Name		C B Basiness Degt		7,520.00	
Fund Name		A Mark Trye		1,000.00	
		Secial Science Selector		1,000.00	
Fund Amount					
				15,500.00	











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
--------------	--------------

ProQuest

17

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

4/17/2015

4/17/2015

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

17/2015	19

Home > Cost Data Uploa	1								
Cost Data Upload									2 Cancel
File Upload Status Collections Cost Tomplete of Collections Cost Tomplete.co	File to Download: File To Upload:	Tery wit	h AD h Route d ost Templat st Template Cost Template	ields Cost Neth Conty te			Download Accept File	ws Processe	lafresh Statu
YGPIColiCost.txt SS.WTCox.TestUpload.txt		12	o o o o comp	Falura	1/7/2014 12:53:54 PM	OS PM		-	
Science Eng Society Costs.lo	,	1		Failure	12/18/2013 1-56-05 PM		29		
Science Eng Society Costs.In		0	0	Successful	10/15/2013 9:17:42 AM		29		
Scott Journals Template. Cos	a.Out15.bxt	364	0	Teilure	10/15/2013 9:11:43 AM		0		
Scott Journals Template.Cos		264	0	Failure	10/15/2013 9:05:26 AM		264		
Shull Journals Templete.Cost		264	0	Teilure	10/14/2013 3:48:22 FM		314		
Shulbrary Print Titles.Costs.		0	0	Successful	10/14/2013 3:18:47 PH		360		
megafile.2011 cost overwrite		0	0	Successful	8/23/2013 3:33:27 PM		2		
megafile.2011 cost overwrite		0	25	Successful	8/23/2013 9:42:10 AM		2		
	WRITE.M	0					2		
megafile costs2011only.OVD megafile costs2011only.bit	WRITE MI	0	25	Successful Successful	8/23/2013 9:18:16 AM 8/23/2013 9:15:49 AM		2		

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
		*Bio Journals Tied to Print	1-0												
			RVL												
		ABI/INFORM Complete	7WY												
		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
Diffections Cost Template.csv		5	0	Failure	1/7/2014 11:00/05 PM	5
Dillections Cost Template.csv		10	0	Feilure	1/7/2014 1:06:31 PM	0
YGMColl Cost.txt		11	0	Failure	1/7/2014 1:02:00 PM	0
SS.WTCox.TestUpload.brt		12	0	Failure	1/7/2014 12:53:54 PM	0
Science Eng Society Costs.txt		1	0	Feilure	12/18/2013 1:56:05 PM	29
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
Shullbrary Print Titles.Costs.Oct14.txt		0	0	Successful	10/14/2013 3:18:47 PM	360
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

4/17/2015			22

Cost Data Template Explanations

ProQuest

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.

4/17/2015

Cost & Usage Data Upload Schedule



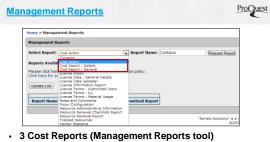
As of July 2014, ProQuest changed the timeframe for inputting or uploading cost and fund account data:

- 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

М	т	W	R	F	S	S
Added		7	8	Available	10	11
before 7:00p EST	Added afte 7:00p EST	r Monday		6:00p EST		>
12		14	15	16	17	18
				Available 6:00p EST		







4/17/2015

- Costs Action
 Cost Report Details
 Cost Report General

	nent Reports			FIO
	escriptions Spreadsheet	Cost Action	Cost Report - Details	Cost Report - Ge
– Mana	gement Report Glossary	Database Package	Statur	Recourse Name
		Database Code	Colection/Karse	Recourse Type
sport Descriptions		T the	Collection/Id	Recourse Identifier
strainfield induced for	32. 2012 contains has of each column dials) that is in the various	890	Provider Name	Provider
		Teleid	Proeider Code	Provider Code
a de l'e servit fui av		Feod/Year	Databasefilarie	Collection
An Line offices has not	Turkel hander	+65N	Batabase Code	Collection Code
opert Haras	Contern	SEN/3	TiteName	Database Package
	List of all centraris and details	.brayColectionTilane	Tideld	FecalYear
pria n		.braryCollection1d	105N	PaymentId
nt Aetion	Facult internation and general details to support action on removing or concerno a resource	Proeider	ISEN	Payment Type
		Provider Code	SSID	Paymer#Date
Report - Deseis	A report of all cost fields associated with all resources all various levels, subdivided by fiscal year, including information such as	Renewal Decision Date	Fiscal View	Payment Amount Local Currence
	seves, subswood by Scaryear, mouding internation euch as translation states estees funds, whereas Tax, and so forth	Durchase Deserved Date	Ure benined Total	
ont Report - General		Purchase Pereval Date	Use benized Total	Transaction Currency C
	A region of codes associated with all resources an various levels, subdivided by frical year	Paper	PaymentD	Payment Amount Illians action DumanoyA
Janse Adlien	Purchase dates, teneral dates and general details to support action an investment of a literate	Page	PaymentType	Include in Total for Yea
		Paymentid	PaymereDate	Instituted Total
izerae Data - General	All fails in the General Information portion of Teenare	Payment Type	Paymers Amount (Local	Use benized Total
Mala		PaymentDate	Transaction Currency Code	
arrae Cata Uploader	A report with all learner fields. Nou can then modify zument footness and add men barroes, and then send to back as so that which used of the value	Payment Amount Local Duriencyl	Payment Amount (Transaction Durrency)	
		Funsaction Cutteries Code	Include in Total for Vear	
eerse Erformation spart	A report containing all fails in the License Data - General Details report and the License Terms - Material Usage report.	Payment Amount (Transaction Durwing)	Inectice Date	
Jamese Terros - Instructional Liberty	Authorities users terms and conditions for all idenses	nclude in Total for Year	heoloe filander	
		tersized Total	Dider Number	
iterse Terrs - 1.1	Enterliking stars terms and conditions for all licenses	Jze henized Cost	Payee	
terse Terris - Material	Moterial usage terms and conditions for all idenses		Payer Reneral Date Advance Notice	
luqe	and a second		Heney all ate Advance Notice Reney all Partition Date	
ister and Comments	Report of all Notes and associated Commerce		Heney al Decision Usia Purchase Panay al Date	
ma Cardaostica	Price details for resource to support tradilectrication provy		PurchasePleneval Date Print Cancellation Restriction	
	10.40	1	Prez Cancellation Peersonion	
NUM ADDISTOR	Summary view of all resource administrative information such as		Print Cancellation Note	
formation	URLs uperverses personnels and to form		TerringianDate	
			Territorian Basson Nate	



ProQuest.		Home
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	
360 Resource Manager and 360 Counter: Cost Data Upload 360 Resource Manager and 360 Counter: Manually Adding Cost Informati	Bibliographic Ďatabases Catalog Énrichment Callection Acabasis	
360 Resource Manager and 360 Counter: Itemized Cost 360 Resource Manager and 360 Counter: Using the Cost Details Report as	Printed Directories Community of Scholars EBL	
360 Resource Manager and 360 Counter: Using the Cost Details Report as 360 Resource Manager and 360 Counter: Cost Pund Account Information	et etrany	
360 Resource Manager and 360 Counter: Cost Data Upload Tool FAQ 360 Resource Manager and 360 Counter: Cost		
360 Resource Manager and 360 Counter: include Cost Payment in Total fo	r Fiscal Year	

