

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, more 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

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Cost Payment Basics

- **Adding Costs to ERM let's you:**
 - Centralize e-resource fiscal information
 - Use for Intota- Cost per Use (CPU) metric, Fund Accounts
 - 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 (Title) Level
- Add costs 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

Adding Cost Information Manually

ProQuest

Costs				
View Provider Cost Add Payment				
Fiscal Year	Database Costs	Title Costs	Effective Cost Edit	% Difference
2015	0.00	2,325.85	2,325.85	17%
2014	2,000.00	0.00	2,000.00	

Effective Cost Settings

Select databases or titles to apply to effective costs

Fiscal year: 2015

Databases: ☐ Titles: ☐

2014: Databases: ☐ Titles: ☐

Cost: 400.00, 200.00, 100.00

[Cancel](#) [Save](#)

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Adding a Payment Manually

ProQuest

Add Payment

General

Fiscal Year: 2015

Payment Type:

Payment Date:

Local Currency: USD

Payment Amount (Local Currency):

Transaction Currency Code:

Payment Amount (Transaction Currency):

Local System Resource ID:

Invoice to Vendor For Year:

Invoice

Invoice Date:

Invoice Number:

Order Number:

Pages:

Page(s):

[Cancel](#) [Add More Details](#) [Save](#)

- Fiscal Year is the only required field to create a Payment ID
- FY and Payment Amount (Local Currency) are required for Counter (Cost per use)

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Local vs Transaction Currency

ProQuest

Add Payment

General

Fiscal Year: 2015

Payment Type:

Payment Date:

Local Currency: USD

Payment Amount (Local Currency):

Transaction Currency Code:

Payment Amount (Transaction Currency):

Local System Resource ID:

Invoice to Vendor For Year:

Invoice

Invoice Date:

Invoice Number:

Order Number:

Pages:

Page(s):

[Cancel](#) [Add More Details](#) [Save](#)

- Local Currency** payment information field will appear in the cost section on the resource's Details page
 - Local Currency maps to Counter for Cost per Use statistic (with FY)

- Transactional Currency** payment information field will not appear on the resource's Details page.

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Payment ID



2016 - Database Payments: ABI/INFORM Complete

Delete

View Provider Payments

Add Payment

Select *	Payment ID	Invoice Number	Payment Date	Pages	Payment Type	Payment	Include in Total
<input type="checkbox"/>	2140866					0.00	Yes
<input type="checkbox"/>	2147142					0.00	Yes
Total Payments						0.00	

- 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 / Accounts



- 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 Name tool
- Fund Names may or may not have a dollar figure; may be greater or less than payment amount
- Fund Names 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 have been added to the Cost Data Uploader templates

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Applying Fund Names to Cost/Payment



2016 - Database Payments: ABI/INFORM Complete

Delete
View Provider Payments
Add Payment

Select	Payment ID	Invoice Number	Payment Date	Pages	Payment Type	Payment	Include in Total
<input type="checkbox"/>	2140866					0.00	Yes
<input type="checkbox"/>	2147142					0.00	Yes
				Total Payments		0.00	

Fund Name
Fund Amount
More

<input type="checkbox"/>	art	2000.00	Edit
<input type="checkbox"/>	social science	7500.00	Edit
		Total	9500.00

Add

Invoice
Other Details
Fund Codes View Codes
Consortial Agreement Indicator Off
Print Cancellation Restriction Indicator Off

e added manually to the
cal year.
not compare the Fund
Payment Amount. Funds
are separate.

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Cost/Payment Menu Manager



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

Payment Menus

Payment Consortium
Payment Payee
Payment Payer
Payment Type
Transaction Currency Code

- 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



Cost Data Uploader



Home | Resources | Tools | Reports | Admin

Databases | Begin With | Search History

RESOURCE SUMMARY

ProQuest (26)

Databases (26)

Holdings (21417)

Ebooks (171417)

Eperiodicals (55168)

Full Text (2)

Quick Links

Alerts

Contacts

License

Notes

Knowledgebase Notifications (last 03/27/2015)

Add Alerts

MY INTOTA

View All

Upcoming Renewals

Date Resource

04/03/2015 Elany Chemical Engineering Corporate Collection

License Expiration

There are no upcoming license expirations.

Upload Status

04/06/2015 1st - Successful

04/06/2015 002 (Allen Press, Inc.) - Error

Automated Holdings Updates

There are no recent automated holdings updates.

Databases

Manage Your Databases

ASSESSMENT

Web Assessment

Online Surveys

Administrative

Administrative

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• 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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Cost Date Upload

ProQuest

Home > Tools > Cost Data Upload

Cost Data Upload

[Upload File](#) [Download Template](#)

File

DB Cost Upload 3.30.15.txt

DB Cost Upload 3.30.15.txt

DB Cost Upload 3.30.15.txt

CostUpload Suffulddemo.txt

CostUpload Suffulddemo.txt

Oxford DB Costs 2013.txt

Bio DB Costs.txt

Bio DB Costs.txt

Download Template

Template:

Template with Required Cost Fields Only

Failure 1 0 02/11/2015 09:00:02

Total Rows Processed

1

0

0

3

0

1

2

0

1. Select the appropriate Template
2. Download the Titles/Save
3. Enter cost data on the (template) spreadsheet
4. Upload back into Intota

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Cost Data Template Download

ProQuest

Database Name	Code	Title Name	Title ID	ISBN	ISSN	URL	Acquisition Payment ID	Payment Type	Payment Date	Payment Amount	Current Balance
Culinary Arts	ICU	Alcohol Professional Baking	2086752		160802080752						
Culinary Arts	ICU	Alcohol Wine	2086753		160802080753						
Culinary Arts	ICU	Advanced Bread and Pastry	2086754		160802080754						
Culinary Arts	ICU	Alcohol Journal of Food Agriculture	1611208	1688-1018	160802080754						
Culinary Arts	ICU	Alcohol: How it all Adds Up	2012628		1608020822628						
Culinary Arts	ICU	Alcohol: How it all Adds Up	2012628		1608020822628						
Culinary Arts	ICU	Ant Culinary	6327	0892-3324	160802083324						
Culinary Arts	ICU	Australian Journal of Nutrition	02213	0013-1224	160802083324						
Culinary Arts	ICU	Bakery Production and Marketing	7688	0002-6227	160802086227						
Culinary Arts	ICU	Baking Management	72327	1076-1277	1608020872327						
Culinary Arts	ICU	Bread Making	33881		1608020833881						
Culinary Arts	ICU	Bread Life	72328	1248-1224	1608020872328						
Culinary Arts	ICU	Breadmaking	76876	0242-6220	1608020876876						
Culinary Arts	ICU	BETTER NUTRITION	39023	0405-6884	1608020839023						
Culinary Arts	ICU	Beverage Guide	7623	1040-1688	160802087623						
Culinary Arts	ICU	Beverage Industry	12771	0242-6227	1608020842771						
Culinary Arts	ICU	Beverage World	20607	0006-1018	1608020820607						
Culinary Arts	ICU	BEVERAGE WORLD INTERNATIONAL	2026	1076-1277	160802082026						
Culinary Arts	ICU	Beverage World Personal Safety	14912	1040-1688	1608020814912						
Culinary Arts	ICU	Bon Appetit	76613	0006-4996	1608020876613						
Culinary Arts	ICU	Breadmaking Review	20108	0220-2719	1608020820108						
Culinary Arts	ICU	Canadian home economics journal	238475	0008-3783	16080208238475						
Culinary Arts	ICU	Candy & Snack Business	120508		16080208120508						
Culinary Arts	ICU	Candy Business	76232	1242-1242	1608020876232						
Culinary Arts	ICU	CANDY INDUSTRY	12495	1040-1688	1608020812495						
Culinary Arts	ICU	CANDY BUSINESS	121212	1040-1688	16080208121212						

Search "Cost Data Upload" to find SC Answer.

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Upload the Cost Data

ProQuest

Home > Tools > Cost Data Upload

Cost Data Upload

[Upload File](#) [Download Template](#)

File

DB Cost Upload 3.30.15.txt

DB Cost Upload 3.30.15.txt

DB Cost Upload 3.30.15.txt

CostUpload Suffulddemo.txt

CostUpload Suffulddemo.txt

Oxford DB Costs 2013.txt

Bio DB Costs.txt

Bio DB Costs.txt

Upload File

☐ Use itemized totals as effective costs.

Total Rows Processed

1

0

0

3

0

1

2

0

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Cost Data Template Explanations



Cost Data Upload Template / Cost Report - Details: Explanation of the Column Headers				
Column Number	Column Header	Description	Optional/Required Field	Note
1	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 cost for Collection is to be uploaded.	At least one resource match is required in order for the report to upload successfully. For example, including a Collection ID.
2	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	
3	Provider Code	Unique Serials Solutions ID. Assigned by the system.	Required if Provider Name is included and cost for Provider is to be uploaded.	
4	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 provided, the Custom Database Name will appear.	Optional	
5	Database Code	Unique Serials Solutions ID. Assigned by the system.	Required if Database or Title Name is included and cost for Database or Title is to be uploaded.	
9	Title Name	Name of the Title to which payment information has been added.	Optional	
10	Title Id	Unique Serials Solutions ID. Assigned by the system.	Required if Title Name is included and cost for Title is to be uploaded.	
1	ISSN	International Standard Serial Number	Will be blank for books	
2	ISBN	International Standard Book Number	Will be blank for journals	
4	ISSN	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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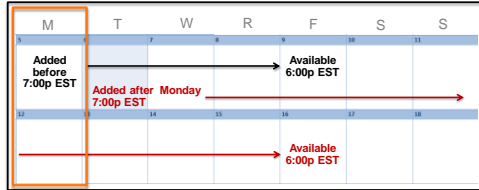
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Cost & Usage Data Upload Schedule



As of July 2014, ProQuest changed the timeframe for uploading usage, cost and fund account data to Intota/IA:

- Data from Intota 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 Reports by Friday at 6:00p Eastern Time




ProQuest Confidential

COST REPORTS (MANAGEMENT REPORTS)



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SUPPORT CENTER DOCUMENTATION

The ProQuest logo is located at the bottom center of the slide. It features the word "ProQuest" in a serif font, with a stylized graphic element below it that resembles a wave or a series of connected dots.

ProQuest

Find Topics

costs

Intota

Intota Assessment

Chadwyck Healey

Disertations

HeritageQuest Online

History Map Works

ProQuest Academic

ProQuest Congressional

ProQuest Digital Microfilm

ProQuest Government Periodicals Index

Search

Intota Assessment: Cost and Usage Data Upload Schedule

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THANK YOU!!

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