



# Consortia Manager

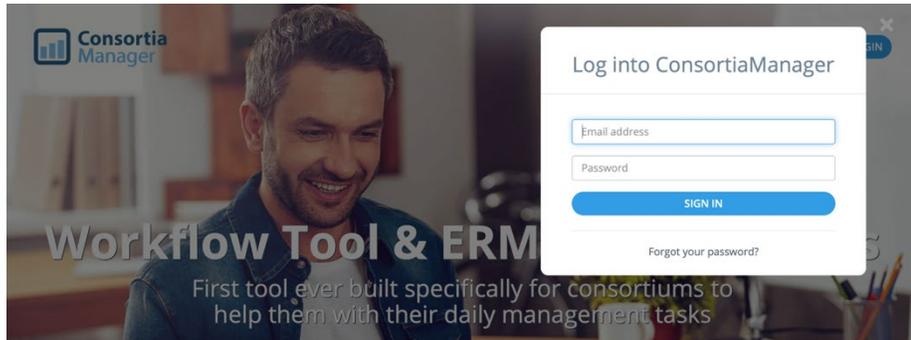
**Member Interface  
How-To Guide**

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## Log into my account

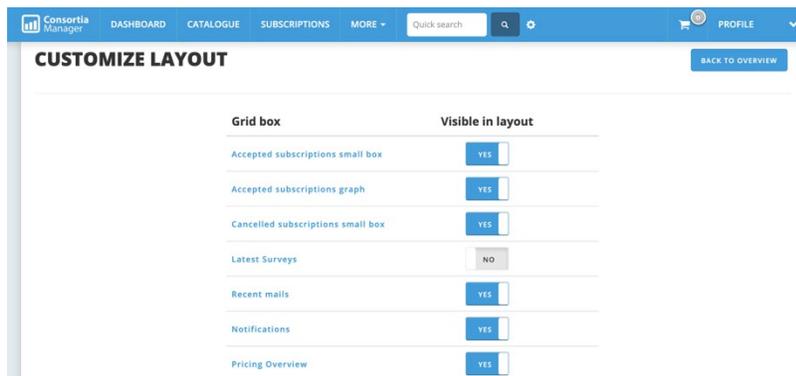
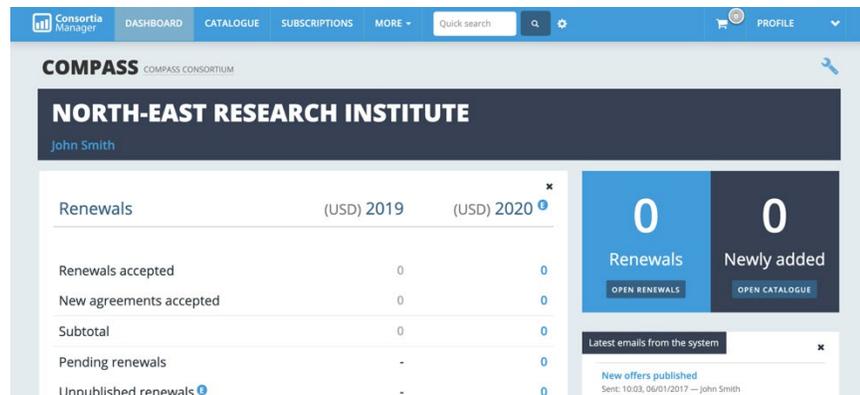
Visit [www.consortiamanager.com](http://www.consortiamanager.com) and click the login button at the top right corner of the page. Login credentials are initially sent out by your participating consortium, although they can be changed once you log in. If you've forgotten your password, please click on the "forgot your password?" option and enter your e-mail address. A reset code will be sent to your address. Please note: It will only be sent to an e-mail address that has already been set up in the system.



## View my dashboard

Once users are logged in, they will automatically be taken to the dashboard page.

The dashboard provides member libraries with a brief overview of the account and serves as the home page. There are several options of what can be displayed on the dashboard, and they can be moved around the page or removed as desired. They can also be customized by clicking on the wrench icon in the top right corner of the page.



In case anything is accidentally deleted on the overview page, it can also be retrieved again by making it "visible in the layout" on this page.

## Managing Subscriptions

From the dashboard, users can access subscriptions by clicking the tab at the top of the page.

The screenshot shows the 'Subscriptions' tab selected in the top navigation bar. The main content area is titled 'NORTH-EAST RESEARCH INSTITUTE' with the user 'John Smith'. A table shows renewal statistics for 2019 and 2020:

Renewals	(USD) 2019	(USD) 2020
Renewals accepted	0	0
New agreements accepted	0	0
Subtotal	0	0
Pending renewals	-	0
Unpublished renewals	-	0

To the right, a summary card shows '0 Renewals' and '0 Newly added' with buttons for 'OPEN RENEWALS' and 'OPEN CATALOGUE'. Below this is a notification for 'New offers published' sent on 06/01/2017 to John Smith.

Once there, users will see a list of all subscriptions the library currently has in addition to those that were purchased in the past. These can be filtered and additional columns of information can be added as needed for easy viewing.

The screenshot shows the 'SUBSCRIPTIONS' page with a table of subscription records. A 'TOGGLE COLUMNS' menu is open, allowing users to select additional information to display in the table.

Agreement	Product	Term start	Term end	Currency
All	All	2019	All	All
American Mathematical Soc...	MathSciNet	01/01/2019	12/31/2019	USD
Chronicle Of Higher Educa..	Chronicle of Higher Educa..	01/01/2019	12/31/2019	USD
Nature Publishing Group (...)	Nature Online	01/01/2019	12/31/2019	USD
Nature Publishing Group (...)	Scientific American	01/01/2019	12/31/2019	USD

The 'TOGGLE COLUMNS' menu includes the following options:

- Publisher
- Agent
- Notes
- Billing address
- PO #
- Multi-year period
- List price
- Local price
- Local currency

There is a distinction in CM between an agreement and a product. An agreement is the overarching title of a collection of titles while the product is a specific journal or database title. Products are linked to a parent agreement in the same way they are linked to a publisher.

From here, users can click on the agreement link for more information. It can also be searched in the search bar or clicked on via the catalog.

**ACM DIGITAL LIBRARY 2020**

Agreement period: 01/01/2020 — 12/31/2020  
 2 years agreement: 01/01/2020 - 12/31/2021  
 Contains products from: ACM

Managed by Jeff Brunner  
 Deadline for reply: 09/30/2019

**Agreement summary**

**About the ACM Organization**

ACM brings together computing educators, researchers, and professionals to inspire dialogue, share resources, and address the field's challenges. As the world's largest computing society, ACM strengthens the profession's collective voice through strong leadership, promotion of the highest standards, and recognition of technical excellence. ACM supports the professional growth of its members by providing opportunities for life-long learning, career development, and professional networking.

Founded at the dawn of the computer age, ACM's reach extends to every part of the globe, with more than half of its nearly 100,000 members residing outside the U.S. Its growing membership has led to Councils in Europe, India, and China, fostering networking opportunities that strengthen ties within and across countries and technical communities. Their actions enhance ACM's ability to raise awareness of computing's important technical, educational, and social issues around the world.

**ACM Publications - Advancing Research, Technology, and Innovation**

As a leading global source for scientific information, ACM promotes computer research and innovation through its Journals, magazines, and the proceedings of more than 170 annual conferences and symposia. ACM authors are among the world's leading thinkers in computing and information technologies, providing original research and firsthand perspectives.

ACM also provides access to the ACM Digital Library (DL), a comprehensive and expanding database of literature and detailed bibliographic resources for computing professionals from a wide range of publishers. The DL currently includes more than 1 million articles authored by leading researchers in computing. The flagship magazine *Communications of the ACM* provides industry news, commentary, observations, and practical research.

Last updated by Jeff Brunner on 08/08/2019

**Price**

You are not subscribing

**Agreement history**

Period	Value
<b>2020</b>	<b>0 USD</b>
01/01/2020 - 12/31/2020	<a href="#">More info</a>
<b>2019</b>	<b>0 USD</b>
01/01/2019 - 12/31/2019	<a href="#">More info</a>
<b>2018</b>	<b>2,000 USD</b>
01/01/2018 - 12/31/2018	<a href="#">More info</a>

**Subscribers per year**

Year	Subscribers
2018	5
2019	4
2020	4

The agreement page will have a bevy of information about any current and historical subscription pricing, information about the publisher or journal collection as it pertains to that agreement as well as information about the number of subscribers within the consortium and more detailed pricing information.

The products that are related to this agreement are listed out next to the publisher's contact information. They can be clicked on for more information about that product specifically.

**Products in this agreement**

Product	Title list	Subscribed	Price
ACM fantastic collection	✓	✗	100.00 USD
Computing Reviews	✗	✗	0.00 USD

**License information**

General

License name: ACM License

**Publisher information**

Name: ACM

Address: No address saved for this publisher

Website: <https://www.acm.org/>

Contact name: Jeff Smith  
 Email: [Smith@jeff.com](mailto:Smith@jeff.com)

Contact name: John Smith

**License information**

**General**

License name: ACM License  
 License period: 01/01/2019 - 12/31/2022  
 License manager: Jeff Brunner

**License summary**

The following summary is provided for informational purposes only. Please **always** refer to the exact terms in the license agreement

---

License comment

---

**License terms**

**ILL**  
Only within XYZ

**Perpetual access**  
See section 2.9 in the contract

---

**Remote user access**

**TDM Rights**

---

**License files & links**

[Main contract](#)   John   03/18/2019   [Download file](#)

Contact name  
John Smith  
Job title  
IT manager  
Email  
[mail@consortiamanager.com](mailto:mail@consortiamanager.com)

---

Contact name  
Peter Jones  
Job title

Additional information

METADATA

Further down the page will share other subscribing libraries to that agreement within the consortium and any relevant links the consortium has shared.

**Subscribers in 2020**

Type	Member	Products
<b>R</b>	East High School	1 products
<b>N</b>	East University	1 products
<b>R</b>	South-East University	1 products
<b>R</b>	South-West High School	1 products

---

**Links for this agreement** EDIT YOUR LINKS

---

**Access URL**  
Access  
<https://test.consortiamanager.com>

---

**Statistics URL**  
Admin links  
<https://docs.google.com/document>  
Username: *library1*  
Password: *passlast*

---

**Additional comments & notes**

Lastly, the bottom of the page provides room to include any extra notes, attachments, and to view the latest activity on the agreement. Notes and attachments can be added by both the library and the consortium.

### Additional comments & notes

[ADD](#)

### Related attachments

[UPLOAD A FILE](#)  
**Member files** 0 **Consortium files** 1  

? No files found  
No files have been uploaded in this category

### Latest actions

[SHOW LATEST](#)

## Subscription Page

The subscription page looks fairly similar to the agreements page:

The screenshot shows the 'IMAGINARY DATABASE' subscription page in the Consortia Manager interface. The page is divided into several sections:

- Header:** Includes the Consortia Manager logo, navigation tabs (DASHBOARD, CATALOGUE, SUBSCRIPTIONS, MORE), a search bar, and user profile options.
- Subscription Overview:** Displays 'Active subscription for North-East Research Institute' with a 'BACK TO OVERVIEW' button. It also shows the subscription period '01/01/2019 to N/A' and notes it is available in the 'Imaginary Agreement 2019 agreement'.
- Product Summary:** Contains two placeholder messages: 'A content summary has not been provided for this product' and 'A content summary has not been provided for this agreement'.
- Pricing Information:** States 'No pricing information has been provided'.
- License Information:**
  - General:** License: No license; License period: No license period; License manager: System.
  - License summary:** The following summary is provided for informational purposes only. Please **always** refer to the exact terms in the license agreement.
- Price — 2019:** A blue box showing '3,000.00 USD' and the note 'The consortium will invoice you for this subscription'.
- Subscription history:** A table listing the subscription:

Product	Year	Duration	Start Date	More info
Imaginary Database	2019	24 months, starting	01/01/2019	<a href="#">More info</a>
- References:** A table with one entry:

Member PO number	
	<a href="#">N/A</a>

Since a library subscribes to a product within the agreement, more information here is specific to the library's active subscription and relates to where it stands in the member workflow, such as the milestones timeline.

License terms

No terms are available for this license.

License files & links

No license information has been added yet. Please contact the license manager for more details

Orders that include this subscription

PO number	Date	Status	Price
DEMO-50023	09/27/2019	Final	3,000.00 USD

Member invoice details

Reference	Issue date	Due date	Price
16	09/27/2019	10/27/2019	3,000.00 USD

Additional comments & notes

Additional comments & notes

Add a note

ADD

Related attachments

UPLOAD A FILE

Member files 0

Consortium files 0

No files found  
No files have been uploaded in this category

Latest actions

SHOW LATEST

Milestones timeline

Ordered by member  
09/27/2019



Ordered at vendor  
09/27/2019

Member invoiced  
09/27/2019  
[View invoice](#)



Invoiced by vendor  
09/27/2019  
[Edit invoice](#)

VAT code

Subscription VAT code N/A

Product details

Product type Standard  
Usage stats No  
Title list Yes

Publisher information

Name  
Imaginary Vendor  
United States  
Contact name  
Jenny Jones  
Email  
[jen.jones@imaginary.com](mailto:jen.jones@imaginary.com)

## Member Profile

From the dashboard page, click on the “profile” button to view a drop-down option to “view profile.”

The screenshot shows the top navigation bar of the Consortia Manager interface. The 'PROFILE' button is highlighted, and a dropdown menu is visible with the following options: VIEW PROFILE, SWITCH ACCOUNT INTERACTIONS, and LOGOUT. Below the navigation bar, the user's name 'John Smith' is displayed next to the institution name 'NORTH-EAST RESEARCH INSTITUTE'.

Once there, most information about the library that will appear in the boxes below can be edited by clicking on the “edit library” option:

The screenshot displays the library profile page for 'NORTH-EAST RESEARCH INSTITUTE (NORT)'. It includes a green 'EDIT LIBRARY' button in the top right corner. The page shows 0 Subscriptions and 100 Total FTE, registered on 11/16/2015. Below this, there are two main sections: 'Contact accounts' and 'FTE information'. The 'Contact accounts' section lists two active contacts for John Smith, both Librarian/Administrator roles, with email addresses and 'No phone number' listed. The 'FTE information' section contains a table with columns for Year, Total FTE, FTE, and STUDENTS, showing data for the years 2019, 2018, 2017, and 2016.

Year	Total FTE	FTE	STUDENTS
2019	0	0	0
2018	0	0	0
2017	0	0	0
2016	0	0	0

The screenshot shows the 'UPDATE NORTH-EAST RESEARCH INSTITUTE' form. It is divided into two columns: 'Basic information' and 'Primary contact'. The 'Basic information' column includes fields for 'Institution name \*' (North-East Research Institute), 'Alternative institution name' (Alternative name), 'Institution name (English version)' (Institution name (English)), and 'Name of library' (Library name). The 'Primary contact' column includes a dropdown for 'Fallback recipient of system emails' (John Smith), an 'Address' section with an 'Att.' field (Att.), and an 'Address line 1' field (North-East Research Institute). A 'BACK TO MEMBER' button is located in the top right corner.

Users can update basic information here (address, primary contact, phone number). There are also some more specific details libraries can include:

<p><b>Online Computer Library Center (OCLC)</b></p> <input type="text" value="OCLC"/>	<p>Invoice settings</p> <p><b>Invoice grouping</b></p> <input type="text" value="Consolidated"/>
<p><b>Carnegie classification</b></p> <input type="text" value="0   (Not classified)"/>	<p><b>Invoicing date preference</b></p> <input type="text" value="No Preference"/>
<p><b>JSTOR classification</b></p> <input type="text" value="N/A"/>	<p>Agents</p> <p><input type="checkbox"/> Invoice by agent</p>

Your library may not use all of the options listed here, but it just goes to show there are many ways to share information as it applies to your library and your library’s relationship with your consortium.

## Update library contacts

Once you click on “view profile,” the option to view the library’s contact list will appear below. New users can be added by the “add contacts” button, and current users can be edited or removed by clicking on the edit pencil next to the user’s name.

Consortia Manager
DASHBOARD
CATALOGUE
SUBSCRIPTIONS
MORE ▾


PROFILE ▾

### NORTH-EAST RESEARCH INSTITUTE (NORT)

0 Subscriptions · 100 Total FTE  
Registered on 11/16/2015 as a library for Compass Consortium

EDIT LIBRARY

**Research Library**  
Managed by John Smith

Contact accounts

ADD CONTACTS

Active contacts
Inactive contacts

Name	Type	Contact info
John Smith <span style="font-size: 10px;">✎</span> <small>Librarian, Administrator</small>	<span style="font-size: 10px;">👤</span>	<a href="mailto:mail@consortiamanager.com">mail@consortiamanager.com</a> <small>No phone number</small>
John Smith <span style="font-size: 10px;">✎</span> <small>Librarian, Administrator</small>	<span style="font-size: 10px;">👤</span>	<a href="mailto:mail@consortiamanager.com">mail@consortiamanager.com</a> <small>No phone number</small>

FTE information

\* = not included in total EDIT

		Total FTE	FTE	STUDENTS
2019	<span style="font-size: 10px;">📄</span>	0	0	0
2018	<span style="font-size: 10px;">📄</span>	0	0	0
2017	<span style="font-size: 10px;">📄</span>	0	0	0
2016	<span style="font-size: 10px;">📄</span>	0	0	0
2015	<span style="font-size: 10px;">📄</span>	100	100	0

## New contact addition

### CREATE A CONTACT ACCOUNT

Use the form below to add a contact for [North-East Research Institute](#)

#### Personal details

##### First name

##### Last name

##### Job title

##### Permission level

#### Contact information

##### Email

##### Phone

##### Alternative phone

##### Fax number

When a new contact is created, there are two fields that should be paid attention to: the permission level and the e-mail options. Passwords can also be reset here.

#### Permission level

#### Fax number

#### Password

##### System generated password emailed to user ?

OR

##### Set a new password (min. 8 characters)

##### Repeat new password

#### Email options

- Invoices emails
- IP changes emails
- Licenses emails
- Ordering emails
- Receive updates emails
- Subscriptions emails
- Usage stats emails

SAVE CONTACT DETAILS

The permission level has three options: View-only, user, and administrator.

- Administrator allows the user to modify all information about the library, add/remove contacts, renew/cancel resources in the system, process invoices, and participate in all functionality of the account.
- Users can renew and cancel subscriptions and can view information.
- View-only works just how it sounds; no changes can be made.

The e-mail options will determine which contacts receive information about different functions in the system. The description list included below is also listed on the new contact page.

**Invoices emails**

All invoices if sent via email and other related invoice matters

**IP changes emails**

Emails related to IP changes

**Licenses emails**

Emails related to licensing for instance notifications about changed licenses

**Ordering emails**

Emails re. new offers, renewals, reminders for renewals and order confirmations

**Receive updates emails**

Updates from ConsortiaManager on new features, tips and tricks, and general information re. the system

**Subscriptions emails**

General information from the consortia for instance emails re. subscriptions that are about to start, general inquiries etc.

**Usage stats emails**

Emails related to usage stats

## Editing or removing an existing contact

This page will look very similar to the “add a new contact” option.

### UPDATE YOUR ACCOUNT

---

Personal details

**First name**

**Last name**

**Job title**

**Permission level**

Contact information

**Email**

**Phone**

**Alternative phone**

**Fax number**

If the user has been set as the primary account, they cannot be deleted. If they are not the primary account, there will be an option to deactivate on this same page:

### UPDATE CONTACT ACCOUNT

[John has a contact account for North-East Research Institute](#)

[DEACTIVATE ACCOUNT](#)

---

Personal details

**First name**

**Last name**

**Job title**

**Permission level**

Contact information

**Email**

**Phone**

**Alternative phone**

**Fax number**

On the profile page, the primary account user is noted by a bolded user icon:

The screenshot shows the 'Contact accounts' interface. At the top, there is a dark blue tab labeled 'Contact accounts' and a blue button labeled 'ADD CONTACTS'. Below this, there are two tabs: 'Active contacts' (selected) and 'Inactive contacts'. The main content is a table with three columns: 'Name', 'Type', and 'Contact info'. There are two rows of data, both for 'John Smith' (Librarian, Administrator) with email 'mail@consortiamanager.com' and 'No phone number'. In the first row, the user icon in the 'Type' column is bolded and circled in red, indicating it is the primary account user. In the second row, the user icon is not bolded.

Name	Type	Contact info
<b>John Smith</b> ✎ Librarian, Administrator	<b>👤</b>	mail@consortiamanager.com No phone number
John Smith ✎ Librarian, Administrator	👤	mail@consortiamanager.com No phone number

Once a user has been deactivated, they will appear in the inactive contacts tab, as seen above.

## Users with a profile already in CM

If a user already has an account set up for them in the system and there is an attempt to add them to the contacts list, a message will appear to help appropriately link the accounts with the corresponding library or consortium. It is possible for a user to have an account affiliated with more than one institution (i.e. located at two different academic branches that have separate resource budgets).

The screenshot shows the 'CREATE A CONTACT ACCOUNT' form in the Consortia Manager interface. The form is titled 'CREATE A CONTACT ACCOUNT' and includes a sub-header 'Use the form below to add a contact for North-East Research Institute'. The form is divided into two main sections: 'Personal details' and 'Contact information'. The 'Personal details' section includes fields for 'First name' (John), 'Last name' (Jones), 'Job title' (Job title), and 'Permission level' (View-only). The 'Contact information' section includes an 'Email' field (mail@consortiamanager.com) and a 'Phone' field (Phone number). A yellow warning box is displayed below the email field, stating: 'The email address your entered is already registered in the system. Press Confirm to send a confirmation email to mail@consortiamanager.com to authorize the link between the new account and the existing account.'

## Passwords

In order to generate a password, users can click on the edit pencil next to the desired contact and scroll down to view two options.

The screenshot shows the user profile page in Consortia Manager. The page is divided into several sections for editing user details. A red box highlights the 'Password' section, which offers two options: 'System generated password emailed to user' (currently set to 'NO') and 'Set a new password' (with a minimum of 8 characters). Below these are input fields for the new password and its repeat. To the right, there are sections for 'Phone', 'Alternative phone', 'Fax number', 'Email options' (with checkboxes for various email types), 'Custom metadata', and 'Allergies'.

**Consortia Manager** DASHBOARD CATALOGUE SUBSCRIPTIONS MORE ▾ Quick search 🔍 ⚙️ ?

**Last name**

**Job title**

**Permission level**

**Phone**

**Alternative phone**

**Fax number**

**Password**

**System generated password emailed to user** ⓘ

OR

**Set a new password** (min. 8 characters)

**Repeat new password**

**Email options**

- Invoices emails
- IP changes emails
- Licenses emails
- Ordering emails
- Receive updates emails
- Subscriptions emails
- Usage stats emails

**Custom metadata**

**Allergies**

The system can generate a password that will be e-mailed to the user or the user can choose their own new password before clicking “save contact details” at the bottom of the page.

## Updating library information from the profile page

There are several things that can be shared about the library with the consortium from the profile page. Besides contacts, users can update their FTE (or population served for public libraries, or whatever the preferred measurement is).

Since this information is often used to obtain pricing with vendors (even for renewals), please ensure these numbers are up to date. Should you need to add any notes, the notes icon can be clicked to include more information (i.e. an increase in funding due to a new degree offering, etc.).

FTE information				
		Total FTE	FTE	STUDENTS
2019		0	0	0
2018		0	0	0
2017		0	0	0
2016		0	0	0
2015		100	100	0
2014		0	0	0

\* = not included in total

Additional information	
Carnegie classification	0   (Not classified)
Invoice grouping	Consolidated
Debitor number	85957
Invoicing date preference	No preference
Invoicing payment terms	No payment terms

There's a box with "additional information" below the FTE information on the profile page:

All of this information comes from the main profile, so if it needs to be changed, please edit the main library profile.

**NORTH-EAST RESEARCH INSTITUTE (NORT)**  
 0 Subscriptions · 100 Total FTE  
 Registered on 11/16/2015 as a library for Compass Consortium

**Research Library**  
 Managed by John Smith

**CONTACT ACCOUNTS**

Name	Type	Contact info
John Smith Librarian, Administrator		mail@consortiamanager.com No phone number
John Smith Librarian, Administrator		mail@consortiamanager.com No phone number

**FTE information**

		Total FTE	FTE	STUDENTS
2019		0	0	0
2018		0	0	0
2017		0	0	0
2016		0	0	0
2015		100	100	0

Further down the profile page, users can also see a list of recent e-mails sent to them by the consortium.

**Latest emails from the system**

---

**New offers published**  
 Sent: 10:03, 06/01/2017 — John Smith  
 Recipients: mail@consortiamanager.com ( + 2 )

---

**Subscription order confirmation**  
 Sent: 21:56, 05/18/2017 — John Smith  
 Recipients: mail@consortiamanager.com ( + 2 )

---

**Check member data**  
 Sent: 21:46, 02/20/2017 — John Smith  
 Recipients: mail@consortiamanager.com ( + 2 )

---

**Test**  
 Sent: 10:24, 01/20/2017 — John Smith  
 Recipients: mail@consortiamanager.com ( + 2 )

Libraries can also view and update their IP addresses. Similar to inactive library contacts, inactive IP addresses are stored in a separate tab.

IP addresses

EXPORT

ADD IP ADDRESS

Active IP addresses

Inactive IP addresses

IP address	Status	Last notification	Last update	
131.165.106.18	✓	View email	12/04/2017 <small>System</small>	<span style="font-size: 1em; color: #3498db;">✎</span> <span style="font-size: 1em; color: #34495e;">🗑</span>
131.165.106.19	✓	View email	12/04/2017 <small>System</small>	<span style="font-size: 1em; color: #3498db;">✎</span> <span style="font-size: 1em; color: #34495e;">🗑</span>

When adding or updating an IP address, users will click on the “add IP address” button to view the following screen:

**CREATE IP ADDRESS** GO TO MEMBER BACK

Use the form below to add an IP address — North-East Research Institute

**IP address version**  **IP address type**

**IP address (1) (2)**  
 .  .  .

**Location**

**Description**

Do not send update to publisher

There is an option to add either IPv4 or IPv6 as well as selecting the type of single or range. When entering the IP address, please type out the full address instead of abbreviating with an asterisk. Whenever those addresses are updated, vendors for all current subscriptions will automatically be e-mailed with the new information in order to ensure continued access. Users can opt to not contact the publisher by clicking the box at the bottom of the page.

Links and attachments can also be included on the member profile (i.e. the consortium-library member agreement).

**Links** ADD LINK

**Access URL -** ✎ 🗑  
[http://ebooks.cambridge.org/access\\_details.jsf](http://ebooks.cambridge.org/access_details.jsf)  
 Username: *member219*  
 Password: *dfgdg42ru*

**Access URL -** ✎ 🗑  
<https://access.oxfordjournals.org/oup/login/local.do>  
 Username: *neri*  
 Password: *sdf43rvrg*

Lastly, a list of order confirmation messages rounds out the page.

**Order confirmation mails**

05/18/2017	Subscription order confirmation	<a href="#">View</a>
11/02/2016	Subscription order confirmation	<a href="#">View</a>

## Renewals

Any open renewals that need to be accepted or rejected will be listed in the dashboard overview, as well as the blue “open renewals” box pictured above. If you click on “open renewals,” users can see a full list of subscription awaiting decisions. The pending renewals will appear.

Renewal subscriptions				
<b>Iter Bibliography 2020</b>				
Products	Subscription periods	Renewal deadlines	Price for 2020	Order options
Iter Bibliography	01/01/2020 - 12/31/2020	01/01/2020	501.20 USD	<a href="#">Cancel</a>
PRODUCT INFO // PRICE INFO				
<b>Iter Italicum 2020</b>				
Products	Subscription periods	Renewal deadlines	Price for 2020	Order options
Iter Italicum	01/01/2020 - 12/31/2020	01/01/2020	105.00 USD	<a href="#">Cancel</a>
PRODUCT INFO // PRICE INFO				

The library can choose to cancel these subscriptions for the upcoming subscription period or they can click “order options” to accept, which will also provide options to include and view additional information.

PURCHASING OPTIONS FOR THIS OFFER							
Please review and confirm your selected products from the list below							
<b>Iter Bibliography 2020</b>							
Product name	Last year Price, USD	Price change	Reference	Options	Price, USD	Order	
Iter Bibliography Subscription 01/01/2020 - 12/31/2020	490.00	2.29 %	<input type="text"/>		501.20	<input checked="" type="checkbox"/>	
<b>Sub-total, USD</b>					<b>501.20</b>		
<b>Total, USD</b>					<b>501.20</b>		

Once items are accepted, they can then be added to the shopping basket. Items can be added individually or all at once. They are not officially ordered until after the order has been placed from the shopping cart. Products that are not current subscriptions but are new orders can also be added from the catalog, as long as pricing is available.

Consortia Manager | DASHBOARD | CATALOGUE | SUBSCRIPTIONS | MORE ▾ | Quick search [ ] [ ] [ ] | [ ] [ ] [ ] PROFILE ▾

**RENEWAL OVERVIEW**  
Renewals for [North-East Research Institute](#)

[ADD ALL TO BASKET](#) [BACK](#)

In more detail, a library would see a list of subscriptions available for renewal. If all subscriptions in the list are ready to be placed in the shopping cart where the final order will take place, click “add all to basket.” This is also true for multi-year subscriptions that require year to year confirmations, as evidenced below.

**RENEWAL OVERVIEW** [ADD ALL TO BASKET](#) [BACK](#)

Renewals for [East High School](#)

You have 1 item in your basket. [View basket](#)

**Multiyear subscriptions**

[ACM Digital Library 2020](#) (2 years agreement: 2020 - 2021)

Products	Subscription periods	Renewal deadlines	Price for 2020	Order options
ACM fantastic collection	01/01/2020 - 12/31/2020	10/31/2019	2,300.00 USD	<a href="#">Cancel</a>

[PRODUCT INFO](#) // [PRICE INFO](#)

---

[Browzine 2020](#) (3 years agreement: 2019 - 2021)

Products	Subscription periods	Renewal deadlines	Price for 2020	Order options
Browzine	01/01/2020 - 12/31/2020	10/31/2019	options	<a href="#">Cancel</a>

[PRODUCT INFO](#) // [PRICE INFO](#)

## Shopping Basket

Once items are added to the shopping basket, users can view all information before choosing to place an order of any desired items. Be sure to use the check boxes to mark the renewals you wish to include when either placing the order or printing. The trash can icon next to the check box allows users to remove subscriptions from the shopping cart. This action will not cancel a subscription, it will just place a renewal back in the renewals list or a new product back in the catalog. All products will be categorized under their parent agreement (i.e. two separate journal renewals could be under the heading “EBSCO Journals”). Additionally, the “R” icon in the shopping cart (and elsewhere in the workflow) stands for “renewal” while “N” indicates a new order.

SHOPPING BASKET								PRINT SELECTED	VIEW RENEWALS	REMOVE ALL
Subscriptions for <b>East High School</b> that are pending approval								2 pending subscriptions		
Agreement / Subscription name	Start	End	REF	Billing options ?	Options	Price	<input type="checkbox"/>			
<b>ACM - ACM Digital Library</b> (2 years agreement: 2020 - 2021)										
<b>R</b> <b>ACM fantastic collection</b> Deadline: 10/31/2019	01/01/2020	12/31/2020	<a href="#">Edit</a>	..		2,300.00 USD	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
<i>Early pay discount</i> <i>ACM fantastic collection - Early pay discount</i>						46.00 USD				
						-246.00 USD				
						<b>2,100.00 USD</b>				
<b>WILS - WILS Member Agreement for Project Management</b>										
<b>N</b> <b>Project Management</b> Deadline: 03/31/2020	08/23/2019	11/19/2019	<a href="#">Edit</a>	..		2,000.00 USD	<input type="checkbox"/>		<input type="checkbox"/>	

Please note the “REF” section, where users can opt to type in a purchase order number or a department to be referenced. It can also be left blank. Files can also be uploaded and submitted to the consortium as part of the order. Depending on the consortium, libraries might be able to choose another billing address from this page before submitting to the consortium for invoicing. The billing address can be added or edited from the library’s profile page.

**SHOPPING BASKET** PRINT SELECTED VIEW RENEWALS REMOVE ALL

Subscriptions for **A Demo Library** that are pending approval 2 pending subscriptions

Agreement / Subscription name	Start	End	REF	Billing options	Options	Price
<b>Paratext - 19th Century Masterfile Series</b> (2 years agreement: 2019 - 2021)						
<b>N</b> 19th Century Masterfile All Series Deadline: 10/31/2019	02/01/2020	01/31/2021	PO#400	Main Billing address, , t		600.00 USD
19th Century Masterfile All Series - Admin fee						50.00 USD
<b>R</b> 19th Century Masterfile Series I and III Deadline: 10/31/2019	02/01/2020	01/31/2021	PO#401	Main Billing address, , t		1,000.00 USD
						<b>1,650.00 USD</b>

**PLACE ORDERS** **UPLOAD A FILE**

Lastly, this page can also be printed as a PDF and used as a pro forma invoice.

Compass 10/02/2019

**Approval form**

**Instructions:**  
No instructions

<b>Institution</b> East High School East High School Austin, 49400 United States Att: John Smith, Librarian	<b>Consortium</b> Compass Consortium Suite 24, Floor 5 Publishers' House Washington DC, 10000 United States
--	--

Description	Period	Reference	Cost
<b>WILS Member Agreement for Project Management</b> Publisher: WILS			
Project Management	2019-08-23 - 2019-11-19		2,000.00 USD
<b>Total estimate</b>			<b>2,000.00 USD</b>

**Notes:**  
No notes

## Using the Catalog

Users can access the catalog from the dashboard. The catalog is a full listing of all resources available for purchase from the consortium for your library. The “newly added” box on the right-hand side will alert users to all recent new additions to the catalog that the library may be interested in considering for subscription.

Since the catalog is such a large list of products, it’s highly likely that only some resources will have pricing available. However, they can be requested by clicking on “request price.” Resources that do have pricing can be immediately added to the shopping cart for future ordering.

Type	Agreement	Product	Start date	End date	Deadline	Price
N	ACM Digital Libra..	ACM fantastic collection	01/01/2020	12/31/2020	09/30/2019	REQUEST PRICE USD
N	ACM Digital Libra..	Computing Reviews	01/01/2020	12/31/2020	09/30/2019	REQUEST PRICE USD
N	Brill Journals	Brill Journals	01/01/2020	12/31/2020	None	Options USD
N	Fake News 2020	Fake News	01/01/2020	12/31/2020	09/30/2019	REQUEST PRICE USD
R	Imaginary Agreeeme..	Imaginary Database	01/01/2021	12/31/2022	10/01/2020	3,500 USD
N	Oxford Music 2	Oxford Music 2	01/01/2020	12/31/2020	09/30/2019	REQUEST PRICE USD
N	Browzine	Extra Browzine	01/01/2020	12/31/2020	09/30/2019	REQUEST PRICE USD
N	Browzine	Browzine	01/01/2020	12/31/2020	09/30/2019	REQUEST PRICE USD

Users can also better filter what resources they want to see by clicking on the “toggle columns” button, similar to the subscriptions page.

**PRODUCT CATALOG** TOGGLE COLUMNS MY SUBSCRIPTIONS

List of all available products for [North-East Research Institute](#) 9 results

View products by:  All  Has prices  Upcoming  Renewals only  Recently published

Type	Agreement	Product	Start date	End date	Deadline
N	ACM Digital Libra..	ACM fantastic collection	01/01/2020	12/31/2020	09/30/20

This is another location to view the library’s current subscriptions as well. In addition to filtering via the columns, there are several options next to “view products by” that will allow users to find items that either have available pricing, have upcoming deadlines, are current renewals, or were recently added to the catalog by the consortium. For example, the upcoming deadlines filter would show the following results if the search were conducted on 10/3/2019:

**PRODUCT CATALOG** TOGGLE COLUMNS MY SUBSCRIPTIONS

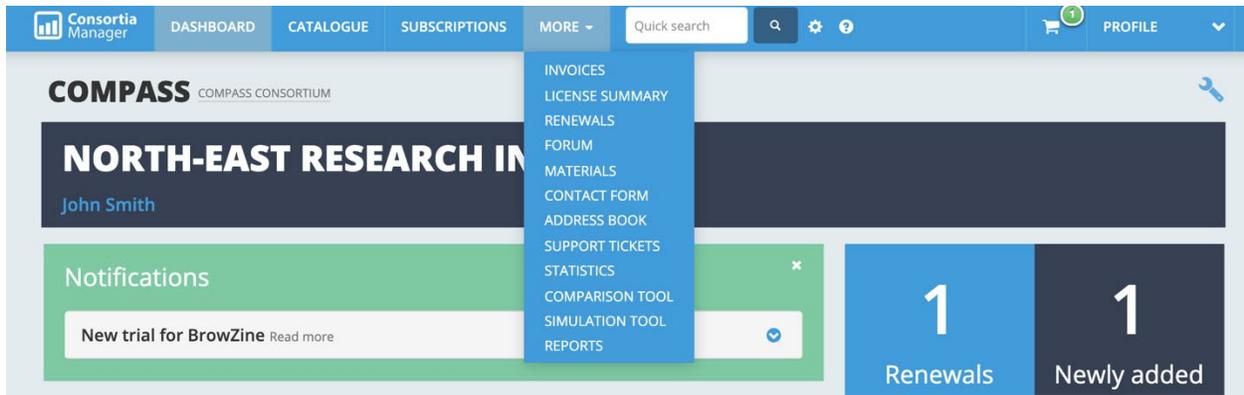
List of all available products for [East High School](#) 6 results

View products by:  All  Has prices  Upcoming  Renewals only  Recently published

Type	Agreement	Product	Start date	End date	Deadline	Price
R	ACM Digital Libra..	ACM fantastic collection	01/01/2020	12/31/2020	10/31/2019	2,300 USD
N	ACM Digital Libra..	Computing Reviews	01/01/2020	12/31/2020	09/30/2019	REQUEST PRICE USD
N	Brill Journals	Brill Journals	01/01/2020	12/31/2020	10/31/2019	REQUEST PRICE USD
N	Fake News 2020	Fake News	01/01/2020	12/31/2020	09/30/2019	REQUEST PRICE USD
N	Oxford Music 2	Oxford Music 2	01/01/2020	12/31/2020	09/30/2019	REQUEST PRICE USD
R	Browzine	Browzine	01/01/2020	12/31/2020	10/31/2019	Options USD

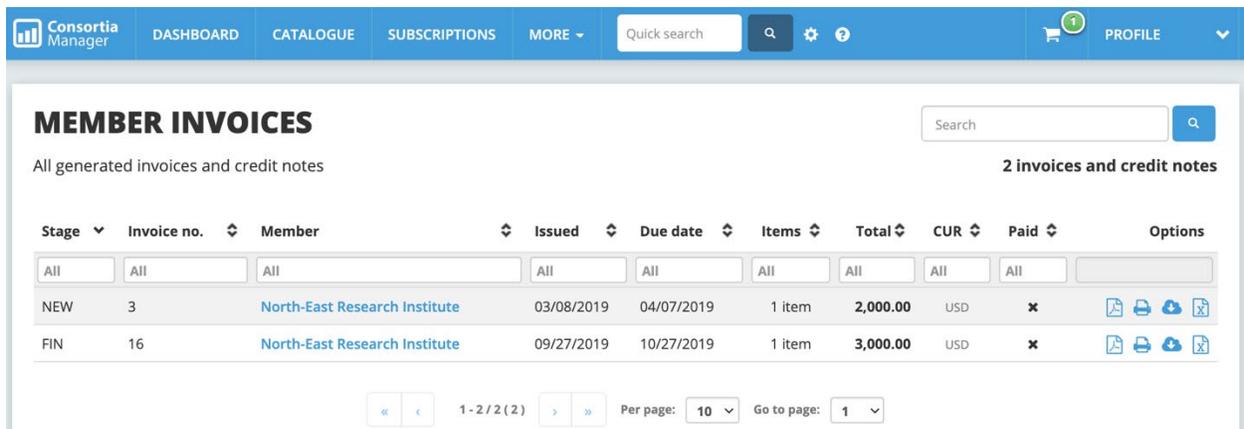
## More Options

The last tab in the dashboard has several options, which may vary depending on your consortium.



## Invoices

Member invoices will provide the library with a full list of all invoices issued to them by the consortium.



Libraries can download, save, and print these invoices. The paid column will track whether the consortium has noted they have received the library's payment for that invoice. Any invoice credits will also appear in this section.

## License Agreements

The license agreement page will give libraries a better understanding of some specific terms of their subscriptions, as defined by the consortium. How much information resides on this page is fully dependent on how much the consortium dedicates to parsing out the agreement terms.

The screenshot shows the 'License Summary' page in the Consortia Manager interface for the year 2019. The page title is 'License terms — 2019'. Below the title, it says 'License information for all agreements'. There is a table with the following columns: Agreement name, Subscribed, ILL, Remote user access, TDM Rights, and Perpetual access. The table contains three rows: 'Imaginary Agreement' (Subscribed: Yes, ILL: -, Remote user access: -, TDM Rights: -, Perpetual access: -), 'ACM Digital Library' (Subscribed: No, ILL: ✓, Remote user access: ✗, TDM Rights: ✗, Perpetual access: ✓), and 'Browzine' (Subscribed: No, ILL: -, Remote user access: -, TDM Rights: -, Perpetual access: -). At the bottom of the table, there are pagination controls showing '1 - 3 / 3 (3)' items, 'Per page: 10', and 'Go to page: 1'.

Agreement name	Subscribed	ILL	Remote user access	TDM Rights	Perpetual access
Imaginary Agreement	Yes	-	-	-	-
ACM Digital Library	No	✓	✗	✗	✓
Browzine	No	-	-	-	-

## Materials

The materials tab serves as a drop box for the consortium to share documents with users.

The screenshot shows the 'MATERIALS' page in the Consortia Manager interface. The page title is 'MATERIALS'. Below the title, it says 'Below you can see our collection of materials'. There is a table with the following columns: Author, Type, and Value. The table is currently empty.

Author	Type	Value
--------	------	-------



## Reports

Users can create a variety of reports that can be saved and exported.

The screenshot shows the 'REPORTS' section of the Consortia Manager interface. At the top, there are navigation tabs: DASHBOARD, CATALOGUE, SUBSCRIPTIONS, and MORE. A search bar and a profile icon are also visible. Below the navigation, there are buttons for 'FORECAST REPORT', 'COST AVOIDANCE', and 'CREATE NEW'. The main content area is divided into two sections: 'Standard reports - Created and defined by consortium' and 'Saved reports - By your institution'. The 'Standard reports' section shows a table with columns for Report name, Type, Description, Created by, and Options. The 'Saved reports' section shows a table with columns for Report name, Type, Description, Created by, and Options. The 'Saved reports' table has one entry: 'Products on the shelf' with Type 'Products' and Created by 'John Smith'.

For example, a library might wish to run a monthly report of subscription data and the date they were invoiced by the consortium. There are several options on the left-hand side that will allow the user to limit their search field.

The screenshot shows the 'REPORT' creation page in the Consortia Manager interface. The page has a blue header with navigation tabs: DASHBOARD, CATALOGUE, SUBSCRIPTIONS, and MORE. A search bar and a profile icon are also visible. On the left side, there is a sidebar with a search bar and several filter categories: PUBLISHERS, AGREEMENTS, PRODUCTS, SUBSCRIPTIONS, PRICES, INVOICES, and LICENSES. Below the sidebar is a 'CLEAR ALL FILTERS' button. The main content area is titled 'REPORT' and 'Create a new report'. It contains several form fields: 'Choose Report Type' (a dropdown menu with 'Subscriptions' selected), 'Title' (a text input field with 'Title' entered), 'Description' (a text area with 'Description' entered), and 'Columns' (a section with a 'Check/Uncheck All' checkbox and two columns of checkboxes for various data fields: VAT code, IPv4 addresses, IPv6 addresses, FTE total (sub-period minus 2 y), CM subscription URL, Publisher invoicing, and Publisher invoice date. The 'Basic information' column includes Subscription ID, Agreement name, Product name, Publisher name, and Start date.

Secondly, they can further select which columns they'd like to see in the Excel report.

Consortia Manager | DASHBOARD | CATALOGUE | SUBSCRIPTIONS | MORE | Quick search | PROFILE

Create a new report

**Choose Report Type**  
Subscriptions

**Title**  
Title

**Description**  
Description

**Columns**

Check/Uncheck All

**VAT CODE**  
 IPv4 addresses  
 IPv6 addresses  
 FTE total (sub-period minus 2 y)  
 CM subscription URL

**Publisher invoicing**  
 Publisher invoice date  
 Publisher invoice reference

**Member invoicing**  
 Member invoice paid Y/N  
 Member invoice x-rate

**Billing address**  
 Billing country  
 Billing state / Province / Region  
 Billing post Code

**Basic information**  
 Subscription ID  
 Agreement name  
 Product name  
 Publisher name  
 Start date  
 End date  
 Sales price  
 Final price

**Member invoicing**  
 Member invoice date  
 Member invoice number

At the bottom of the reports page, users can generate the report to view it now as well as save the report for future use, which is especially helpful if the same information is pulled on a regular basis.

Preview

GENERATE
SAVE REPORT

All users and administrators will be able to view and run reports collectively. The consortium can also create and save a report for their member libraries.

## Switch Accounts

Some libraries may be part of multiple consortia that use CM or users may work at more than one library using CM. Should that be the case, users can choose which consortium or library they want to interact with when logging in, as well as switching accounts when moving from one consortium or library page to another.

The screenshot shows the top navigation bar with 'Compass Consortium' and 'NORTH-EAST RESEARCH INSTITUTE' branding. The user's name 'John Smith' is visible. A profile dropdown menu is open, displaying the following options:

- VIEW PROFILE
- SWITCH ACCOUNT
- INTERACTIONS
- LOGOUT

The 'USER ACCOUNTS' page prompts the user to 'Select the account you would like to access from the list below'. The table below contains the following data:

Account type	Organization	Institution	Job title	Select account
Consortium	Compass Consortium	N/A	Administrator	<a href="#">CONTINUE</a>
Member	Compass Consortium	North-East Research Institute	Librarian	<a href="#">CONTINUE</a>
Member	Compass Consortium	North-West Academy	Librarian	<a href="#">CONTINUE</a>

## Interactions

The interactions page will give the user a comprehensive history of what interactions have occurred with the system. Note these can also be filtered as they pertain to specific issues, such as which user or member completed a task, which actions regarding IP addresses were taken, and actions relating to subscriptions, offers, and products.

Consortia Manager
DASHBOARD
CATALOGUE
SUBSCRIPTIONS
MORE ▾

🔍
⚙️
👤
🛒 1
PROFILE ▾

### INTERACTIONS

BACK TO OVERVIEW
REFRESH DATA

Below you can see the most recent interactions with the system Last update 22:33, 10/03/2019

**Filter results**

Users
  Members
  FTEs
  Ip addresses
  Ndm subscriptions
  Ndm offers
  Ndm products
  All

Timestamp	Description	Type
<b>John Smith</b> 16:29, 10/02/2019	Agreement <a href="#">Imaginary Agreement</a> added to basket for Member <a href="#">North-East Research Institute</a>	Agreements
<b>John Smith</b> 16:29, 10/02/2019	Product <a href="#">Imaginary Database</a> added to basket (3500) for Member <a href="#">North-East Research Institute</a>	Agreements
<b>Jeff Brunner</b> On behalf of John Smith 16:39, 09/27/2019	Product <a href="#">Imaginary Database</a> accepted (3000) for member <a href="#">North-East Research Institute</a>	Basket
<b>Jeff Brunner</b> On behalf of John Smith 16:39, 09/27/2019	Agreement <a href="#">Imaginary Agreement</a> added to basket for Member <a href="#">North-East Research Institute</a>	Agreements