Getting Started in EBSCONET® Subscription Management

Introduction

*EBSCONET® Subscription Management* is EBSCO’s interactive, Web-based management tool that helps you take control of your EBSCO subscriptions. The EBSCONET portal also offers access to *EBSCONET® ERM Essentials®, EBSCONET® Usage Consolidation,* and the *EBSCO A-to-Z® Administrator site.* EBSCONET’s suite of solutions helps you efficiently manage administrative tasks associated with your entire collection.

*Important:* You may not have access to all of the features listed in this document, depending on the configuration of your EBSCONET account and the permissions granted to you by your EBSCONET administrator.

Logging In to EBSCONET


   *Hint:* Click *Forgot Login Information?* to have your EBSCONET login information emailed to you.

2. The *EBSCONET Subscription Management* main menu displays.

EBSCONET Homepage

Once you are logged in to EBSCONET, the main menu displays across the top of the homepage:

<table>
<thead>
<tr>
<th>Title Search</th>
<th>Orders</th>
<th>Renewals</th>
<th>JETS Order Activity</th>
<th>Local Check-In</th>
<th>Reports</th>
</tr>
</thead>
</table>

- **Title Search** – search for existing titles and order new titles. Review and place an order with EBSCO’s *Missing Copy Bank*.

- **Orders** – view the orders within your EBSCO account. Create new orders, review publisher packages, review and place claims, download invoices, and access electronic data interchange (EDI) features. Review registration and activation information and track your progress for registration using EBSCONET’s Online Order Activation feature. View E-Journal Updates such as format changes, changes in publisher, package changes, and more.

- **Renewals** – work your regular renewals and E-Package Renewals items, submitting changes to EBSCO for processing for the next renewal period.

- **Reports** – view reports about your EBSCO subscriptions. Access immediately available online reports and request other reports for later delivery.
Immediately below the main menu, the EBSCONET News page displays by default. (You can also access the News page by clicking the News link at the bottom of any EBSCONET page.) On the EBSCONET News page, you will find current announcements pertinent to EBSCONET (for example, system enhancements or changes to a feature). In addition, if a new EBSCONET news item or E-Journals Updates announcement is available, a red bubble will appear at the top of the page next to your user name, indicating the number of new notifications you have received. Click on the icon to view or take action on new notifications.

Critical or time-sensitive communications from EBSCO will be displayed as an EBSCONET news item or alert. If an EBSCONET news item is available, it will appear on the News page:

**Scheduled System Maintenance on 16 August 2012**

EBSCO will be performing scheduled maintenance on 16 August 2012 from 12:00 PM to 1:30 PM Eastern Time (16:00 – 16:30 GMT). Customers using EBSCONET® and EBSCONET® Usage Consolidation during this time may experience intermittent interruptions. We apologize for any inconvenience this may cause.

### Navigation Elements in EBSCONET

Throughout EBSCONET, you will see several standard navigational elements as you explore each page, search for a specific element in your collection, or page through lists of results.

#### Breadcrumb Navigation Links

As you click through the pages on the EBSCONET interface, breadcrumb navigation links will appear at the top of the page, immediately below the menu bar. Click any one of the breadcrumb links to return to a previous page.

In the example above, you are viewing the Title Details page for a specific title after performing a search. Because this page is active, the title name will not be hyperlinked. Click the Title Search link to return to the search results list.

#### Grid Navigation Toolbar

At the top and bottom of any list of results (for example: search results or reports), you will see the standard grid navigation toolbar:
• The **Next** and **Previous** buttons take you to the next page or previous page of the list of results.

• The **First** and **Last** buttons take you to the beginning or end of your results list.

• The **Records per page** drop-down menu will select the number of records to display per page; the system will remember your preference.

• The **Export** drop-down menu exports the current results list in Microsoft® Excel, HTML, Comma-delimited Text, Tab-delimited Text, and XML formats for your records. Simply select a format from the drop-down menu and click **Export**.

![Export Options](image)

### Grid Sort/Filter Options

At the top of each grid/results list, there are several options available for you to refine or limit your search results:

• Click the column name to sort the column in “ascending” order. Click it again to sort in “descending” order.

• A drop-down menu below some columns allows you to filter by a list of pre-defined values in that column. For example, to filter results on the Title Search results page to only those titles that are being actively published, select **Active** from the drop-down menu under the **Title Status** column heading.

![Title Status](image)

• Columns can be moved within the grid display based on your preference. Click the “move” arrow above the **Field** name and drag it to the left or right of the screen. The setting will be remembered during your next EBSCONET session.
Quick Search and Advanced Search
EBSCONET offers both a **Quick Search** and an **Advanced Search**.

**Quick Search**
Quick Search allows the searching of key fields relevant to the area being searched (titles, orders, renewals, etc.).

**Advanced Search**
Advanced Search allows you to select one or two search options from the search drop-down menus (for example, **Subject Category** and **ISSN**). Depending on the area being searched, you may also have additional options for limiting your search results.
Customizable workspace

The EBSCONET workspace can be custom-tailored to your specific needs. In addition, “sticky” page settings “remember” preferred search criteria, limiters, available fields, and order of columns, allowing you to refine search results as needed upon execution of a search.

Available Fields

Select the **Available Fields** tab to add and remove columns on the grid display. Select which fields you want to display; the selection will be remembered upon next login:

![Available Fields](image)

- A green check means the field is included in the result set grid display.
- You can deselect fields you do not want to show.
- A “lock” icon indicates a field that cannot be hidden from display.
- All fields displayed in the grid display will be included in the export file.

**Tabs – Accordion View**

You can display details pages in **Tabs** view or as collapsible panels in **Accordion** view. You also have the ability to print a selected tab/panel or select **Print All** to print all details for a title or order.
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Setting up EBSCONET

Before you begin using EBSCONET, you may wish to set up additional users of your EBSCONET account and control the features available to each user. In addition, you may wish to select default settings for your account and name customer-defined fields that may be available to you.

1. On the right side of any EBSCONET page, click the My Account link above the menu bar, or hover over the link for a drop-down menu.

2. Click one of the following links:
   - Account Preferences
   - User Administration
   - Site Administration

   Note: User Administration and Site Administration will only display if you are the EBSCONET administrator.

Account Preferences

On this page, make the default selections for your account preferences.

For assistance, contact EBSCO Customer Satisfaction: support@ebsco.com or 800-758-5995, option 2 | April 2014 | page 6
• Under the General tab, select a default language, display date format, numeric format (displays decimal and thousands separator according to cultural preferences), customer code prompt, user name prompt, and start page. From the customer code and user name prompts, select “No” for both settings if you would like EBSCONET to remember your Customer Code and User Name.

• Under the Change Password tab, you can change your login password.

• Under the Order Preferences tab, you can set up default values to be automatically entered when you create a new order, such as a purchase order number, start date, term, fund code, or order comments.

• Under the Links tab, select which links you wish to appear on the Order Details and Title Details pages. For example, you can choose to show links to the Missing Copy Bank and Volume/Issue Information pages.

• Under the Claims Preferences tab, you can select a default claim reason from the drop-down menu and enter a default value to be populated for the Volume/Issue Claimed field.

• Under the Report Selection tab, you can choose to show All Reports on the EBSCONET Reports page by selecting the appropriate checkbox, or select the individual checkboxes for the individual reports you wish to display.

• Under the Usage/Analysis Options tab (if available), you can tailor the behavior of EBSCONET Analytics. If your institution subscribes to EBSCONET Usage Consolidation, you can also control several aspects of how usage data from your Usage Consolidation account is integrated with EBSCONET. For information about subscribing to Usage Consolidation, please contact your EBSCO customer service representative (CSR).

You can set up defaults such as analysis dashboard display, account number, platform, estimated usage, current year definitions, and currency. You can adjust the numeric ranges (“thresholds”) that control the visual representation of the performance metrics that appear in analysis dashboards:

<table>
<thead>
<tr>
<th>Thresholds</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Titles with Use:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Green</td>
<td>Percentages greater than the maximum Yellow range will be displayed in Green</td>
<td></td>
</tr>
<tr>
<td>Yellow</td>
<td>40 %</td>
<td>60 %</td>
</tr>
<tr>
<td>Red</td>
<td>Percentages less than the minimum Yellow range will be displayed in Red</td>
<td></td>
</tr>
<tr>
<td>% Use from Top 20% Subscribed:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Green</td>
<td>Percentages less than the minimum Yellow range will be displayed in Green</td>
<td></td>
</tr>
<tr>
<td>Yellow</td>
<td>25 %</td>
<td>75 %</td>
</tr>
<tr>
<td>Red</td>
<td>Percentages greater than the maximum Yellow range will be displayed in Red</td>
<td></td>
</tr>
<tr>
<td>Use from Subscribed Titles:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Green</td>
<td>Percentages greater than the maximum Yellow range will be displayed in Green</td>
<td></td>
</tr>
<tr>
<td>Yellow</td>
<td>30 %</td>
<td>70 %</td>
</tr>
<tr>
<td>Red</td>
<td>Percentages less than the minimum Yellow range will be displayed in Red</td>
<td></td>
</tr>
</tbody>
</table>

When you are finished, click Confirm Changes.

User Administration
The User Administration page is only viewable by the EBSCONET Administrator. On the User Administration page, you can view the list of existing EBSCONET users, set up new users, and control the access permissions of existing users.
Setting Up a New User

1. Click the **My Account** link at the top right corner of any EBSCONET page (above the menu bar), or hover over the link for a drop-down menu.

2. Click the **User Administration** link.

3. At the bottom of the **User Administration** page, click **Add User**.

4. Fill out the user’s information, including a unique user name and 8-character password.

5. In the list of user authorizations, select the check boxes for any options to which the new user should have access.

6. When you are finished, click **Add User**.

Editing Permissions for an Existing EBSCONET User

1. Click the **My Account** link at the top right corner of any EBSCONET page (above the menu bar), or hover over the link for a drop-down menu.

2. Click the **User Administration** link.

3. Locate the user in the list that appears. Click the **Edit** icon in the row containing the user name.

4. In the list of user authorizations, select the check boxes for any options to which the user should have access.

5. When you are finished, click **Save Edit**.

Site Administration

The **Site Administration** page is only viewable by the EBSCONET Administrator. On this page, you can rename up to three customer-defined fields which can be used to associate information with an order. For example, you can create a “Consortium” field to track titles provided by a consortia agreement. Any fields you enter here will also be searchable via the **Orders** page.
Note: Customer-defined fields are available only within the order and renewal sections of EBSCONET. They are not viewable on reports, claims, invoices, etc.

To create a customer-defined field, simply enter your terms in the fields provided on this page and click Submit.