Thank you for selecting EBSCO to handle your subscription needs and allowing us to serve your institution. This document is designed to help you with easy access to information about your business with EBSCO. If you need additional assistance, please contact your Customer Service Representative/Account Manager for more details.

Help Guide to Working with EBSCO
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Contacting EBSCO
Contact your local EBSCO office or visit our support site for answers to frequently asked questions.
EBSCONET®

EBSCONET® is a web-based subscription management system designed to help your library staff efficiently manage print and electronic journals.

EBSCONET Features

- View all orders and packages you have with EBSCO
- Place print claims, view claim status and responses via EBSCO’s Interactive Claim Checker™
- View and manage access and registration of e-journals and packages
- Track your activity and help control your budget with a wide range of reports
- Search titles in EBSCO’s title file to view details and rates
- View a list of consolidated print subscriptions outsourced to EBSCO and view shipment history (if applicable)
- Search missing copy bank for spare issues EBSCO has available from publishers

Service Delivery

EBSCO will assign an experienced Account Manager/Customer Service Representative to your account. This representative will be responsible for all customer service communication and resolution of your subscription inquiries. Your representative will provide regular updates on outstanding inquiries. Our goals include:

- Acknowledging service inquiries within one working day.
- Researching and providing details on the progress of your inquiry.
- Regularly following up and updating you regarding action taken until resolved.

Your representative will be available to resolve your subscription needs including (but not limited to) claims, online access and the placement of new orders.

Online Access

Registration details for online access and licensing information can be found on EBSCONET by running the E-Journal Access and Registration Report. The key columns to look at are AD-Publisher Registration URL, AH-Registration Instructions, AK-IP authentication and AO-Authentication information.

If you are unable to access an online title, please email your Account Manager/Customer Service Representative and include the following information:

- A screenshot of the error message.
- A brief description of how/what you have tried to access the title.
- Your ILS Number or PO number.
- The title name.
Missing Issues

- EBSCO will attempt to claim missing issues on your behalf. EBSCO does not guarantee issues will be replaced as the decision will ultimately be made by the publisher.
- Should the publisher be unable to replace a missing issue, EBSCO will ask for an extension or credit.
- To ensure the best outcome for each missed issue the library will need to be certain that it has contacted EBSCO within the publisher’s claiming policy. A list of these restrictions can be located within each title in EBSCONET.
- EBSCO does not guarantee delivery/receipt of issues during a subscription period. EBSCO’s guarantee is to process your subscription renewals, make payments to publishers on your behalf and invoice you according to your invoice requirements.
- Should a publisher go out of business or fail to supply, EBSCO will credit your account based on refunds EBSCO has received from publishers.
- If a publisher is unreliable in delivery, EBSCO suggest you do not renew this title.

Claims

Placing First and Second Claims:
You may place claims one of the following ways:

- Through the EBSCONET claiming screen.
- Electronic claiming through your Integrated Library System (ILS) if applicable.
- Email your Account Manager/Customer Service Representative and include the following information: account number, ILS number, title name, volume and issue number.

Placing Third Claims/Escalating Claims:
For domestic publications, please allow 4-6 weeks before claiming a third time or to escalate. For non-domestic publications, please allow 8-10 weeks.

EBSCO recommends using EBSCO’s interactive Claim Checker on EBSCONET to place third claims. Alternatively you can contact your Account Manager/Customer Service Representative directly to escalate a claim.

Reasons you would escalate a claim to your Account Manager/Customer Service Representative:

- Non-starts. (With last issue received, include dates as well as volume and issue.)
- Ceased receiving. (Include dates as well as volume and issue.)
- Duplicate issues being received. Please include copies of labels and the title, as well as your account number.

Interactive Claim Checker
The Interactive Claim Checker (ICC) handles your follow-up claims and allows you to receive updates regarding your claims on EBSCONET. You can access the ICC by selecting “Claim Checker” from the Orders menu in EBSCONET. You can easily see all current claims for your account. Once an issue is claimed EBSCO allows 30 days for a publisher to respond before the claimed issue is added to the Interactive Claim Checker for your review and update.

Using the ICC and Taking Action:
The following actions are available for each claim listed on the ICC page. You will need to select the status listed below to advise EBSCO if the missing issue has been received, or needs additional action.
• **No Action (default).** To take no action on a claim, leave this item selected. A claim remains on the ICC for 60 days before being dropped and assumed as received.

• **Reclaim.** To send another claim notice to the publisher; the current claim is removed from the list to allow time for the publisher to respond to the second claim.

• **Re-list.** To keep the claim on the ICC but not send additional correspondence to the publisher. This allows more time for the publisher to send the missing issue (shipping time) and keeps the claim on your watch list.

• **Received.** To indicate that the claimed issue/volume has been received.

• **Remove.** To remove a claim from the ICC, click the REMOVE radio button. The claim is removed from the ICC.

**When Does EBSCO Stop Claiming?**

Single Issue Claim: If an issue isn’t received after three attempts at claiming, EBSCO will drop the claim. A statistical breakdown of the fulfilment rates of all claims placed at EBSCO offices worldwide illustrates why we do this: 1st claims are filled 85.1% of the time; 2nd claims 11.9%; 3rd claims 3%. The EBSCO missing Copy Bank will be checked in addition to claiming.

Non-Service Claim: EBSCO will claim (including letters, email and by telephone) a total of six attempts. If the publisher does not respond after this time EBSCO will stop following up the non-service claim.

**EBSCO Renewals**

Customers are set up to have an annual/main renewal of their subscriptions. Typically subscriptions begin between January and June of the following year depending on the start date of the subscription.

EBSCO sends customers their annual/main renewal lists in June; EBSCO will provide renewal checklists with current known prices. For those publishers that have not set prices for the following year, EBSCO can provide an estimate based on prices from the previous year.

Once you have received your renewal list, please edit/add to it any necessary additions, cancellations, delivery address and recipient changes etc., and return for processing by the end of September. EBSCO will ensure that all changes are made and that each subscription is renewed in a timely manner.

EBSCO also offers automatic renewal, whereby you can arrange for renewals to be made on an ongoing basis without further intervention on your part.

**Timeline for Renewals and Using EBSCONET**

Below is a timeline for renewals and a summary of the benefits of using EBSCONET to manage the renewals process.

EBSCONET allows you to search, manage and work your renewals more efficiently, and gives you access to 25 serials management reports to assist with your purchasing decisions.

Working your renewals on EBSCONET can be accomplished with three easy steps:

1. Modify the renewal order if you are making changes, or simply select Yes, No or Hold.
2. Authorize your selections.
3. Release your renewals to EBSCO for processing either in batches or as one complete list.

By completing your renewals online, you have the added benefit of exporting lists to Excel, delegating tasks to other staff, and processing your renewals by subscriber, department, fund code, or by each individual title.
### Timeline for Working Renewals in EBSCONET

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| **May** | **Renewals available to view on EBSCONET:**  
- The renewal list is an extract of current subscriptions as of May 2015; any subsequent changes will not be reflected in the renewals list.  
- Customers are alerted by an email notification that renewals are available.  
- Subscription price information is indicative only as future pricing is not known at this time.  
- Subscription price information does not include discounts or taxes.  

**May-Sept.** | Customer reviews their renewals and submits their instructions to an Account Manager/Customer Service Representative via EBSCONET. We ask that you complete your renewal by late September if at all possible to allow adequate time for processing.  
If you are unable to meet the September deadline, please notify your Account Manager/Customer Service Representative.  
At any time in the process, the customers may contact their customer service Representatives/Account Managers for training and support for handling their renewals through EBSCONET.  
**A customer can:**  
- Work and release their renewals in batches, e.g., by delivery address (ship-to), by cost center/fund code (HEGIS) or individual line items.  
- Change title formats. (*The price will not update if an alternative format is chosen.*)  
- Change the quantity.  
- Change the individual subscription references such as own reference number.  
- Add new titles.  
**You must contact your Account Manager/Customer Service Representative to:**  
- Change an address.  
- Change subscriber (ship-to) codes.  

| June-Sept. | EBSCO contacts all publishers for future price information.  
Current and future pricing will be available on EBSCONET as it is updated in the EBSCO title file.  
The Historical Price Analysis Report on EBSCONET is available to assist with budgeting.  |
|Sept.-Dec. | Your Customer Service Representative/Account Manager manages the renewals process and handle the following tasks:  
- Acknowledge receipt of renewals instructions.  
- Provides a list of titles added to a customer’s holdings after the renewals list is produced.  
- Provide pricing information where required, e.g., for online format titles.  
- Ensure subscriptions are renewed correctly via thorough quality control.  
- Release orders with payment to publishers in good time for January start dates.  
- Create invoices for the customer.  |
| Sept. |  
- Customer receives the renewal invoice for subscription renewals for the upcoming year.  
- Pricing is based on latest publisher price information.  
- If subsequent to ordering and pricing has changed, a supplementary invoice will be issued.  
- Standing orders are invoiced separately.  |
| **Payment Terms** |  
- The majority of publishers require prepayment from EBSCO and a significant proportion of prepayments will have already been submitted when invoices are dispatched to customers.  |
E-package Management from EBSCO

An increasing amount of the business EBSCO handles for libraries comes in the form of e-journal packages. This can range from small title packages to complex “Big Deals.” Placing e-journal package orders via EBSCO offers the following benefits for libraries:

- A dedicated representative to assist in managing your subscription account.
- Timely and correct invoicing. EBSCO verifies publishers’ invoices prior to the billing (both in the initial negotiation phase and at renewal time).
- The ability to track the registration and licensing of all your e-packages.
- Maintenance of a detailed order history.
- The ability to track and allocate cost per title, allowing you to assign fund codes if needed.
- Automated feeds of package order data made available for your ILS.
- A single source for e-package information for purchased titles and for all titles available.
- An overview of your collection by including your package titles in your reports.
- Real-time reporting on title changes within packages so you can track titles as they move in and out of publisher collections to ensure proper access is enabled.

Journal Expediting Service (JETS)

Journal Expediting Service (JETS) is available for most non-US customers. JETS handles many of the tasks associated with delivery of print issues, such as check in, claiming and reporting. JETS collects journals at 10 locations worldwide (Europe, Asia, Australia and other countries) and allows you to receive your journals quickly. At each location, journals are checked in, packed securely and shipped at the frequency chosen by the customer. They arrive intact weeks sooner than through normal publisher distribution methods. JETS also works with various integrated library systems (ILS) and offers custom add-ons to tailor the service for any library’s print-resource needs. Delivery details can also be viewed via EBSCONET.

Need Help Navigating EBSCONET?

EBSCO provides free training and demonstration for users and administrators on a variety of EBSCO products and interfaces, including EBSCONET. These 30-minute sessions provide a quick introduction to EBSCONET, navigating the interface and descriptions of major EBSCONET functions. The EBSCONET Subscription Management System facilitates ordering, claiming and renewals. In addition to your order history, EBSCONET provides access to EBSCO’s title file which includes information about titles, package options, registration information and publisher details. Visit the training site to view the new sessions that are offered each month.
Glossary of Terms

Understanding Terms Used in Our Business
To assist customers with understanding terms used in our business, a glossary of terms is provided below.

**Account number**
Your account number consists of:
- 2 letters
- 7 digits. The last two digits are also referred to as the suffix.

An account number can have multiple delivery addresses.

**Annual renewal**
EBSCO’s main renewal of subscriptions; the subscription start dates are usually January to June.

**Credit memo**
A form of refund to the customer after the original invoice has been sent. Usually (not always) caused when the publisher reduces the price or ends the publication after the original billing. It may also be generated following a customer’s cancellation of the subscription.

**Delivery address – Ship-to**
This is also referred to as the ship to address and is the address where publications are delivered to. EBSCO uses two code letters, the subscriber code i.e. AA, for each delivery address. Orders for every delivery address will be invoiced separately.

**Electronic Data Interchange (EDI)**
The exchange of information in highly structured electronic formats suitable for satisfying the business needs of trading partners across industries without human interpretation or intervention; the computer-to-computer exchange of information using a standardized format. EBSCO initiates EDI of invoices, claims, orders and renewals.

**Frequency**
Options are: IR (irregular), SM (semi-monthly), QR (quarterly), OR (odd-regular), AN (annual), WK (weekly), SA (semi-annually), MO (monthly), BW (biweekly), BM (bimonthly), TQ (tri-quarterly), DA (daily), BE (semi-annually), and UN (frequency unknown).

**Fund code**
This code has been provided to EBSCO by your library and represents a department, cost center or fund.

**Integrated library system (ILS) number**
This number has been produced by your integrated library system and provided to EBSCO by the library. It usually represents an order- or title-specific purchase order number.

**Invoice address – Bill-to**
This is also referred to as the Bill-to address and is directly linked to your 7-digit EBSCO account number.
Invoice date
EBSCO prepays most publishers by the time you are due to pay your invoice. This is important, because it ensures the continuation of supply of your print journals and electronic content at renewal time. We ask that you pay your EBSCO invoice in a timely manner.

Invoice number
This is a system generated 6 or 7 digit number. Often you will receive more than one invoice for the same account, each with its own invoice number.

Mid-year renewal
This is an additional renewal process. It is often used when a library has subscriptions that start from July to December.

Order clearing
EBSCO processes orders and invoices in various computerized batch jobs called clearings.

Original invoice – OI
An invoice for items not previously billed, such as Standing Order, Bill Later, Will Invoice Later or Additional Volumes etc. An original invoice is considered an adjustment because the items did not appear on the customer’s main invoice without a price.

Publisher ID number (PID)
The Publisher ID (PID) number is a unique number provided by the publisher to identify you as a subscriber to a particular title or a group of titles. The PID number is also available from Order History and in various reports in your EBSCONET.

Proforma invoice
1. An invoice sent to customers for review before orders are processed; it is returned to EBSCO for orders to be placed.
2. A dummy or sample invoice sent to a customer requesting information on the cost of an order. A proforma is generally created for proposal purposes, and no order is entered into EBSCO’s system.

Renewal checklist
A list of subscriptions that is given to a customer prior to renewing their subscriptions. The customer, after verifying the titles to be included in the renewal, returns the list to EBSCO. Then EBSCO sends the order to the publishers and an invoice to the customer.

Standing order
A general order to a vendor or publisher to supply the volumes or parts of a particular title, or type of publication as they appear, until notified otherwise. Standing Orders differ from subscriptions in that the customer is invoiced as volumes are delivered. Because the price is not set in advance customers will be invoiced once EBSCO receives the bill from the publisher.

Supplementary invoice - SI
A billing adjustment requiring additional payment after the original bill has been sent. Typically, it is an adjustment charged to EBSCO by a publisher for a rate increase, a charge for special printings, additional volumes, etc. which EBSCO must then pass on to the customer.

Title number
This is EBSCO’s identifier for a title. The title number is 9 digits. Each version of a title (whether geographic, different format, etc.) is assigned its own title number.