
 **Intota™**

**Intota Training Session  
Module #1**

**Scott Shull**  
*Sr. Training and Consulting Partner*  
ProQuest Workflow Solutions, Seattle, WA

**April 2016**



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**Agenda** 

- Intota E-Resource Management (ERM) Overview & Impact
- Intota Training Plan and Library Milestones
- Library Project Planning Best Practices
- Intota Data Repositories
  - Module #1 - Contacts, Collections, Menu Settings
- Management Reports

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**Key E-resource Functionality** 

- ✓ Knowledgebase Integration
- ✓ License & Contact Management
- ✓ Resource Subscription and Renewals
- ✓ Cost/Payment and Fund Code Tracking
- ✓ Workflow Management
  - ✓ Alerts
  - ✓ Notes
  - ✓ Menus
- ✓ Management Reports Outputs
- ✓ Custom Collections
- ✓ Automated holdings / DDA

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**ERM Impact on Your Library** 

- **Collect, consolidate** and **centralize** your “source data” into one system for easy staff access;
- **Create** a local, controlled vocabulary that streamlines staff communication and understanding of e-resources’ lifecycle;
- **Implement** new **workflows** that support e-resource management;
- **Improve efficiency** by simplifying your ERM tasks, minimize manual effort and increasing your staff’s effectiveness;
- **Maximize** your budget and facilitate collection management decisions

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**Intota Training Plan** 

<p><b>Intota ERM Training Module #1: Contacts and Collections</b> (60 min, webinar)</p>	<ul style="list-style-type: none"> <li>➤ Review the 4 Data Repositories in Intota: Contacts, Licenses, Renewals and Cost/Payments</li> <li>➤ “Source Data” Entry Planning – Project Planning Document Review &amp; Discussion</li> <li>➤ Contacts – Template and Uploader</li> <li>➤ Creating Custom Collections</li> <li>➤ Menu Settings: 1 – Contacts Menu</li> <li>➤ Management Reports 1</li> </ul>
<p><b>Intota ERM Training Module #2: Resource Status and Renewals</b> (60 min, webinar)</p>	<ul style="list-style-type: none"> <li>➤ Subscription Statuses and Importance to Workflow</li> <li>➤ Resource Renewals Workflows &amp; Activity Notifications</li> <li>➤ Administration Tool</li> <li>➤ Alerts 1 - Resource Status Alerts</li> <li>➤ Alerts 2 - Renewal Alert</li> <li>➤ Management Reports 2</li> <li>➤ Menu Settings: 2 - Resource Status and Renewals</li> </ul>
<p><b>Intota ERM Training Module #3: License Administration</b> (60 min, webinar)</p>	<ul style="list-style-type: none"> <li>➤ License Administration Workflow</li> <li>➤ Creating Custom Collections</li> <li>➤ Alerts 3 – License Alert</li> <li>➤ Management Reports 3</li> <li>➤ Menu Settings 3 – License Menu</li> </ul>
<p><b>Intota ERM Training Module #4: Cost/Payments</b> (60 min, webinar)</p>	<ul style="list-style-type: none"> <li>➤ Cost/Payment Data Workflows</li> <li>➤ Fund Accounts</li> <li>➤ Cost Data Uploaders</li> <li>➤ Notes and Comments</li> <li>➤ Alerts 4 – Cost/Payment Alerts</li> <li>➤ Management Reports 4</li> <li>➤ Menu Settings 4 – Cost/Payment and Notes Menu</li> </ul>

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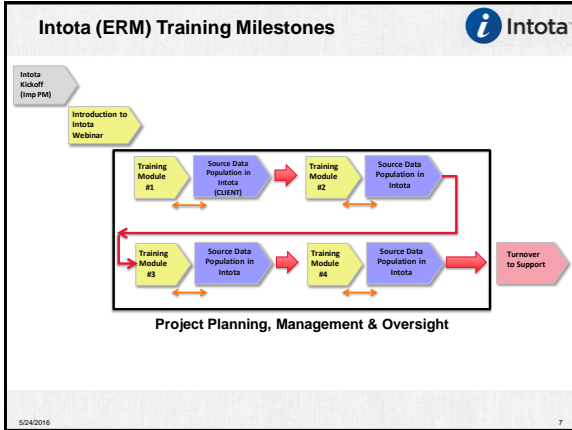
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- ### Intota Project/Action Plan
- #### Project/Action Planning Document
- Planning and Preparation Steps
    - Create a project team of 3-5 individuals
      - Determine staff resources
      - Begin locating and gathering your “Source Data”
      - Create Project Calendar
      - Set Target Goals for data population and implementation
  - Project Team makes the ERM source data population and your library’s implementation a **priority**
  - Know that this is an investment of time and resources
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**Project Planning Team** 

- Who from your staff will comprise the implementation team? Who needs to be involved from the beginning?
- What information does the library staff need to track in Intota? What data is required, optional or not needed?
- How do we make the ERM **indispensable** to the staff? (How will you integrate it into everyone's daily work processes?)
- How do we establish a shared language/vocabulary?
- How do we create and value the time necessary for data entry/population?

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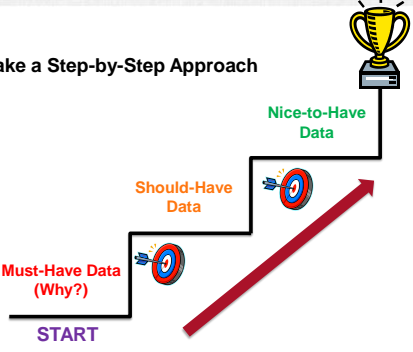
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**Source Data Population** 

Take a Step-by-Step Approach



**Must-Have Data (Why?)**

**Should-Have Data**

**Nice-to-Have Data**

**START**

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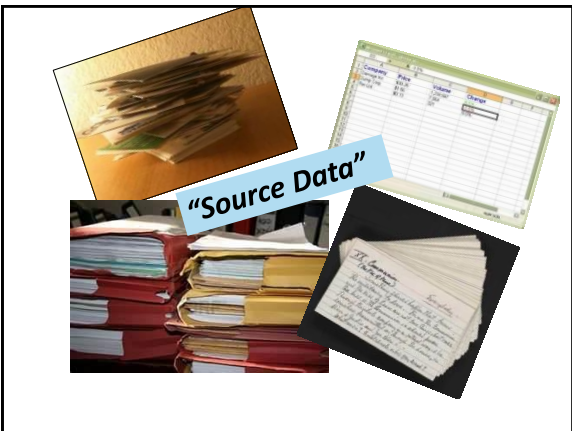
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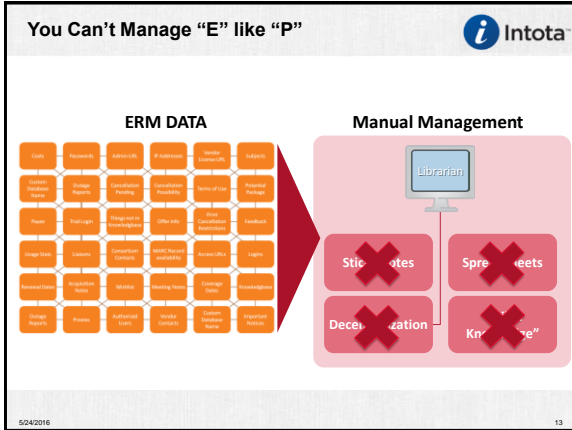
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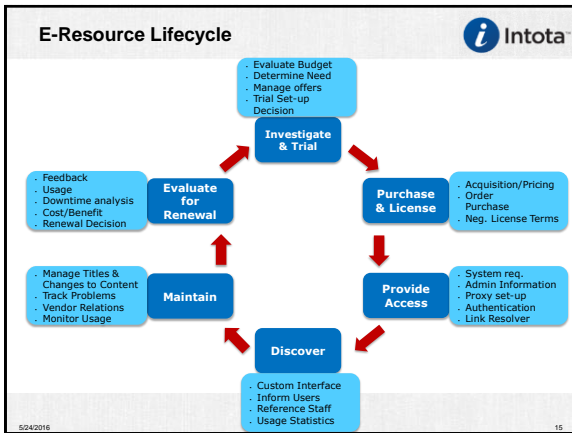
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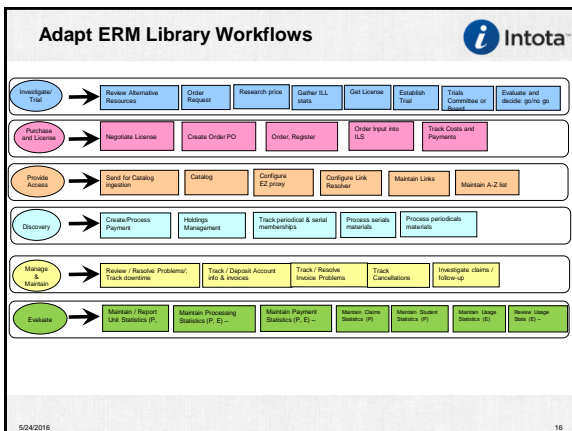
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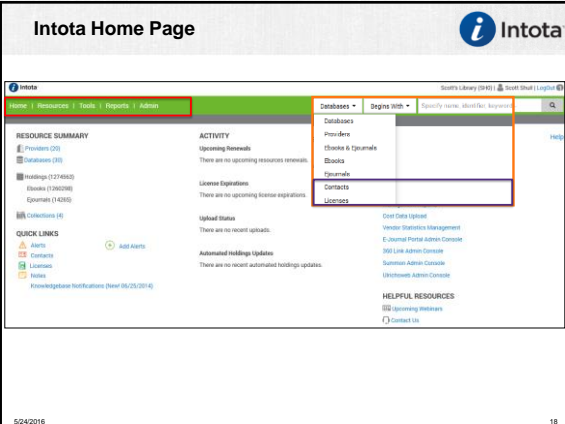
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**Intota Home Page** 




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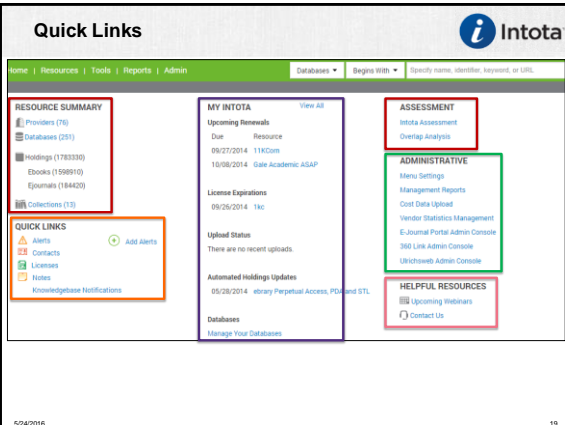
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**Quick Links** 




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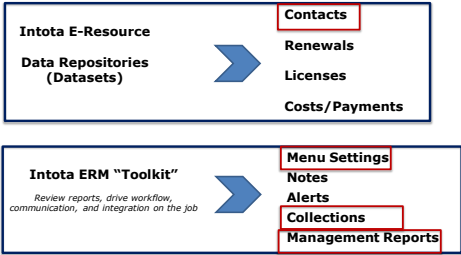
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**ERM Overview in Intota** 



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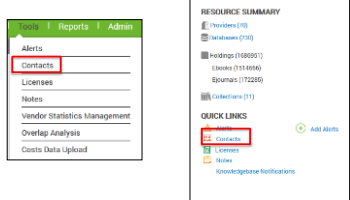
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**Contacts in Intota** 



**Intota offers multiple ways of accessing e-resource management tools:**

- Intota Home Page (shown above)
- Integrate into your workflow from resource details page

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### Contact Uploader

- Contact Uploader Template allows you to upload contacts in one “batch”
- Overwrite existing contacts or add to existing contact list
- Add your contacts to spreadsheet template and send to ProQuest Support for uploading
- Attach resources to your contacts after they are uploaded

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### Menu Settings

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### Menu Settings

- 6 main Menus with 19 different menu values (choices) that may be customized; most are pull-down menus for fields mostly in the ERM data repositories
- Opportunity to create a “controlled vocabulary” – one that matches your library’s own needs & workflows
- “Values-based decision” of your ERM implementation team

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**Menu Customization Workflows** 

Contact Menu: Contact Role


**New Contact**

\* Required Field

Last Name \*

First Name

Contact Type

Role  

Title

Organization

Cancel

**Contact Details**

- Technical Support
- Vendor
- Provider
- Psych Dept

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**Menu Customizations Overview** 

ERM Tool	Customizable in the pull-down Menu (Add New...)	Must use Menu Settings to Add Menu Items
<b>Contacts</b>	<ul style="list-style-type: none"> <li>Contact Type</li> </ul>	<ul style="list-style-type: none"> <li>Contact Role</li> </ul>
<b>Licenses</b>	<ul style="list-style-type: none"> <li>License Type</li> <li>License Status</li> </ul>	<ul style="list-style-type: none"> <li>License Physical Location</li> <li>License Authorized Users</li> <li>License Remote Access</li> <li>License Terms of Use</li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>Note Type</li> <li>Note Status</li> </ul>	
<b>Cost/Payments</b>		<ul style="list-style-type: none"> <li>Payment Payee</li> <li>Payment Payer</li> <li>Payment Consortium</li> <li>Payment Type</li> <li>Transaction Currency Code</li> </ul>
<b>Resource Renewals</b>	<ul style="list-style-type: none"> <li>Renewal Checklist</li> </ul>	<ul style="list-style-type: none"> <li>Renewal Type</li> <li>Renewal Status</li> </ul>
<b>Resource Status</b>	<ul style="list-style-type: none"> <li>Resource Status</li> </ul>	

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**Collections** 

- **Use Collections ....**
  - To label a group of e-resources
  - **OR**
  - To combine "unlike" e-resources and attach ERM data to it
- **A database can only be part of 1 Collection**
- **Collection Examples:**
  - Group purchases (publisher groups)
  - Consortia
  - Subject Collections/Selectors
  - 2015 Wishlist (resources you're considering for Trial/Purchase in upcoming FY/Q)
  - Library Managed Holdings/Tied to Print or Catalog
  - Kill in 2016 (future cancellations)

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**Collections Workflows** 

**Add Collection**

\* Required Field

Name \* Humanities

Description

To save your collection, select Save.  
To add a resource, select Add Resource. Your new collection will be saved and you will go to a page to find a resource.

Cancel Add Resource **Save**

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**Collection Workflows** 

**Humanities**

About **Exp**

Name Humanities

Administration **Exp**

**Related Resources**

[Back to Library Collection Details](#)

**Add Resource to Library Collection: Humanities**

To attach a resource, search and then select a resource from the results.

Databases **Begins With** Specify name, identifier, keyword, or URL **Q**

Cancel **Resources**

Auto Renewal

Subscription Title

Renewal Note

Renewal Document

Perpetual Access Note

Renewal Cost Note

**Costs** **Add Payment**

Fiscal Year	Collection Payments	Database Title Costs	Effective Cost	% Difference

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**Management Reports** 

Reports | Admin | Databases | Begins With | Specify name, identifier, keyword, or URL

**Management Reports**

Counter Summary  
Knowledgebase Notifications  
There are no upcoming resources renewals.

License Expirations  
There are no upcoming license expirations.

Upload Status  
There are no recent uploads.

Add Alerts

Automated Holdings Updates  
There are no recent automated holdings updates.

**ASSESSMENT**  
Intota Assessment  
Overlap Analysis

**ADMINISTRATIVE**  
Menu Settings  
**Management Reports**  
Cost Data Upload  
Vendor Statistics Management  
E-Journal Portal Admin Console  
360 Link Admin Console  
Summon Admin Console  
Ulrichweb Admin Console

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**Report Workflows** 

**Management Reports**

Select Report | Contacts | Report name  **Request Report**

Note: You should name the report so the report name is unique and recognizable to you

**Reports available for Download**

Recently generated reports may take a few moments to appear in the table  
If you are experiencing significant delays, please see this Support Center Document for more information.

**Refresh List**

Report	Date	Created
license_data_-_General_Details_3940-2015-05-26-36967.zip	05/26/2015	a day ago
contacts_3940-2015-05-27-37003.zip	05/27/2015	a few seconds ago

- 22 Management Reports allow you to extract and view your e-resource data in Intota
- Email notification when the report has been generated

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**THANK YOU!**

<http://www.proquest.com/go/trainingeval>

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