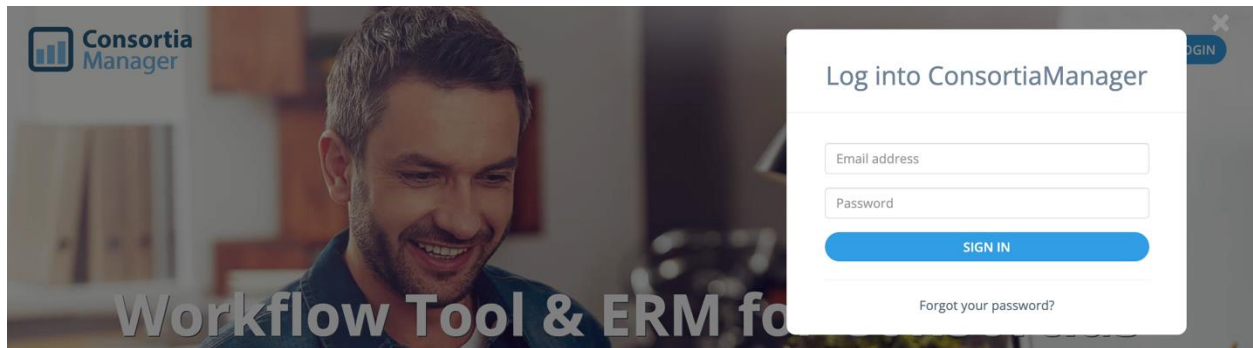




ConsortiaManager Guide for eHLbc Affiliate Members

Logging In

Visit www.consortiamanager.com and select the login button at the top right corner of the page. If you have forgotten your password, select the “Forgot your password?” option and enter the email address associated with your account to send a reset code.

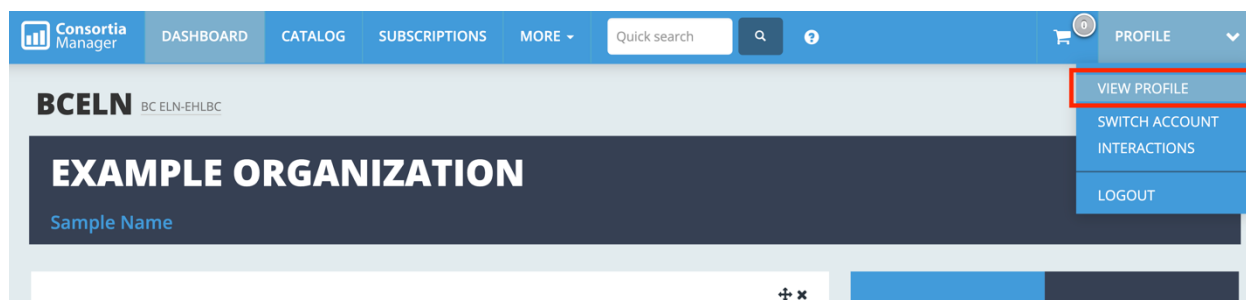


If you do not have an account set up, anyone at your institution with a ConsortiaManager administrator account can create one for you. See more information below or [contact the eHLbc Administrative Centre](#).

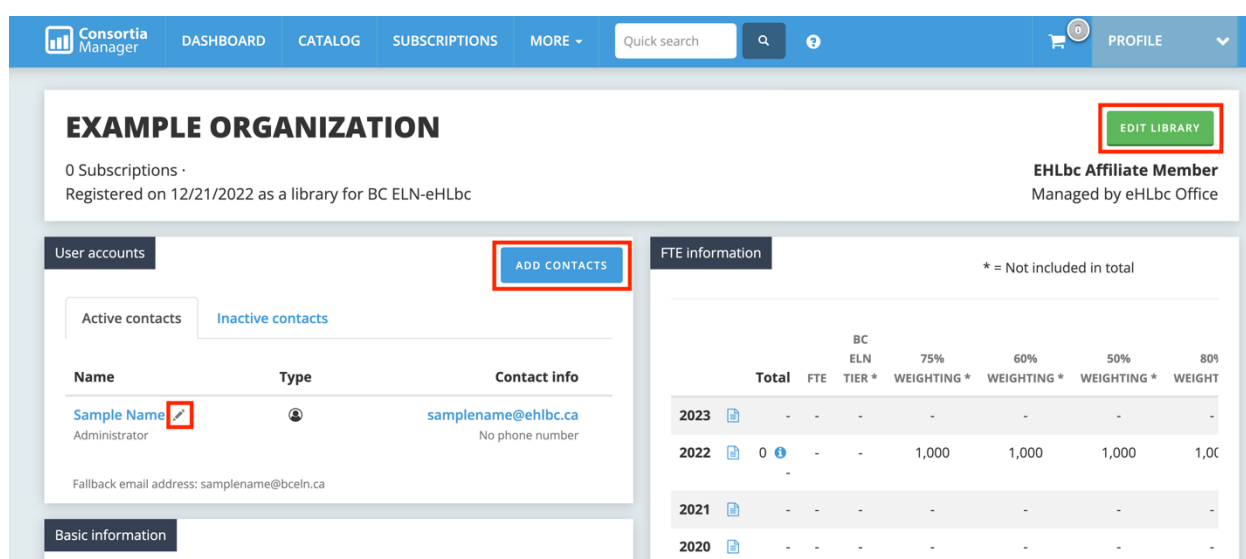
Once you have logged in, you will be taken to the ConsortiaManager dashboard, which provides a brief overview of your account and serves as a homepage.

Member Profile

Your organization’s **Member Profile** can be accessed by selecting “View Profile” from the “Profile” menu in the top right corner of the dashboard page.



The Member Profile includes your organization’s contact list, basic information about your organization, and the latest emails from the consortium. This is where you can create new user accounts, edit or deactivate existing users, and update information about your organization.



New users can be added by selecting the “Add Contacts” button, and current users can be edited or deactivated by selecting the edit pencil next to the user’s name. Organizational information can be updated by selecting the “Edit Library” button in the top right corner.

Email Notifications

You will receive emails from ConsortiaManager based on the email notification settings applied to your user account. These can be adjusted by updating your user account from the Member Profile.

UPDATE YOUR ACCOUNT

Personal details

First name *

Sample

Last name *

Name

Job title

Job title

Password & permission level

Auto-generate & send a password to the user ⓘ

NO

Set a new password * (Min. 8 characters)

Password

Repeat new password *

Password

Permission level ⓘ

Administrator

Contact information

Email *

samplename@ehlbc.ca

Phone

Phone number

Alternative phone

Alternative phone

Fax number

Fax number

Email notifications

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

Custom metadata

Email options

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

Common types of emails you will receive from the system are announcements that new offers or renewals have been published, automated reminders of upcoming renewal deadlines, order confirmation emails, and notices of invoices available for payment.

Managing Subscriptions

Agreements in ConsortiaManager are set to AUTO-RENEW for current subscribers, so action is only required if you wish to join, cancel, or change subscription options. Agreements include:

- **eHLbc Membership Fees**
 - Affiliate Membership fees cover the special projects and extraordinary expenses of the consortium. More information can be found on the [Fee Schedule page](#) on the eHLbc website. Your organization's eHLbc Affiliate Membership Fees will auto-renew on the response deadline, so no action is required on your part.
- **eHLbc Core Suite for Affiliate Members**
 - The Core Suite is a multi-vendor package of nine resources licensed by all eHLbc member institutions. Affiliate members may choose between the EBSCO bundle, the Ovid bundle, or both. If you wish to change which bundle you subscribe to, please contact the eHLbc staff member listed as the lead on the agreement page. If you wish to maintain your current subscription options, no action is required.

- **Boutique Licenses**

- Boutique licenses are opt-in resources external to the Core Suite. These agreements will auto-renew for current subscribers, so no action is required if you wish to maintain your current subscription status. If you wish to join, cancel, or change subscription options, you can view the agreement pages and the Product Catalog within ConsortiaManager.

Product Catalog

The **Product Catalog** lists all the products currently available for your organization to subscribe to. This page is accessed through the “Catalog” button in the top menu. You can accept or reject a product offer using the “Actions” column:



- Select the blue shopping cart icon to add the product to your basket, where you can proceed with finalizing the subscription.
- Select the red X icon to reject the product.

Note: Your organization’s current subscriptions will not appear in the Product Catalog, which only shows active product offers. Your current subscriptions can be found on the **Subscriptions** page, accessed through the top menu.

PRODUCT CATALOG

List of all available products for [Example Organization](#)

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

Type	Notes	Publisher	Agreement	Product	Start date	End date	Deadline	Price	Currency	Recently published	Actions
All		All	All	All	All	All	All	>=0	All	All	
N		eHLbc Office	eHLbc Membership Fees	eHLbc Affiliate Membership Fees	04/01/2023	03/31/2024	04/01/2023	735.00	CAD	★	 

Shopping Basket

The **Shopping Basket** is where you can see pending orders that you have added to the basket for your organization. This page is accessed through the shopping cart icon in the top menu. To confirm a subscription and place the order, select the checkbox in the last column and then hit the “Place Orders” button.

SHOPPING BASKET

Subscriptions for **Example Organization** that are pending approval 1 pending subscription

Agreement / Subscription name	Start	End	REF	Billing options	Options	Price	
eHLbc Office - eHLbc Membership Fees							
eHLbc Affiliate Membership Fees	04/01/2023	03/31/2024	Edit			700.00 CAD	<input checked="" type="checkbox"/>
Deadline: 04/01/2023							
<i>eHLbc Affiliate Membership Fees - 5% GST (Affiliate)</i>						35.00 CAD	<input checked="" type="checkbox"/>
						735.00 CAD	

PLACE ORDERS **UPLOAD A FILE (OPTIONAL)**

Invoices

When a new invoice is available, all users who are set up to receive email notifications for invoices will be sent an email with the invoice attached as a PDF.

Invoices are issued in Canadian dollars and show price breakdowns for each product, including subscription fees, exchange rates, and taxes (including unrecoverable GST).

A full list of invoices issued to your organization can be found on the **Member Invoices** page, accessed in the top menu bar under the “More” tab. From this page, you can download, save, and print your invoices in PDF or XLSX file formats. The “Paid” column will track whether the eHLbc Office has recorded a payment for that invoice.

MEMBER INVOICES

All generated invoices and credit notes 2 invoices and credit notes

Stage	Invoice no.	Member	Issued	Due date	Items	Total	CUR	PAID	Options
All	All	All	All	All	All	All	All	All	

Further Resources

- eHLbc Licensing Overview: <https://ehlbc.ca/licensing/licensing-overview>
- ConsortiaManager Help Section: https://consortiamanager.com/help_sections/index
 - Includes a written Member Interface Guide and member training videos