Account Management System "EVA"

Home:

- On the home page you will be prompted to login using your login credentials which will be provided initially by East View. Enter your username and password and login to begin.
- Editing your login and user settings:
  - After you have logged in to EVA, your username will be displayed on the upper-right corner of the screen alongside the "logout" button and shopping cart link. If you click on your username a brief overview of your personal information and accounts will appear.
  - Initially the only user listed will be your own but if you are the admin of your institution you may add additional user accounts and assign them accounts, login information and email. To add further users simply click "Add User" at the bottom of your brief user information page. You may select the user you wish to display/edit (if there are multiple users under your account) by selecting the user in question from the dropdown menu.
  - By clicking the "Edit" button under the "Action" column a pop-up screen will appear that will allow you to change your login credentials, personal information, accounts and user functions like the ability to place orders.
- Service Announcements
  - Please read for your initial introduction to EVA.
- The home page includes links to all the major modules within EVA. This includes:
  - Title Search
  - Notifications
  - Orders
  - Invoices
  - Reports
  - My Lists

    - My Library
        - Below you will find detailed guides on using each EVA module.
- The shopping cart icon at the top-right of the home page, next to your username, will guide you to the internal EVA shopping cart and will be empty until you have begun adding items to your cart.

Title Search:

- The Title Search module will allow you to search titles within our extensive database. You may search by keyword and add on many additional filters on top of your keyword search.
- A Virtual Keyboard Interface is available to enter your search query in a vernacular character set. You can find this in the upper right-hand corner of the Title Search page. To access the keyboard, click in the "Keyword" search text box and then click on the virtual keyboard. Languages currently available are: English, Russian, and Ukrainian.
- All search functions within Title Search can be utilized by themselves or in conjunction with one another.
- Keyword:
    - You can enter in Keyword search term(s) here and you will be shown a list of matching results. You must enter search terms in the keyword text box, you cannot leave this blank.
- Product Type filter:
    - Atlases, Books, Maps, Serials, Video
- Product Format filter:
    - Microform, Online, Print, Digital
- "Author":
    - The default search index in this field will be "Author." If you click on the down arrow next to Author a list of other options will appear including: ISBN/ISSN, Language, Publisher, Country of Publication, Description, Product # (this is the East View Information Services internal number for a given product), and Year of Publication. By clicking on the + symbol you can add up to three additional search terms so that you can create a more advanced set of search parameters. Simply click the – symbol if you wish to take out additional search terms you no longer need.
    - After choosing a search index(es) you can click inside the search box and enter in a search term.
- Subject:
    - By clicking on "Subject" a pop-up list will appear that includes all available subjects that can be searched within EVA. The subjects will be divided into categories by Product Type.

        - Books, Serials, Databases
        - Atlases
        - Maps
        - Video
    - In the Subject pop-up list you can select as many subjects as you wish by selecting the check box next to the subject and then click "Ok."
- Title Search Results:
    - Search parameters may be saved after they have been entered so that you may easily run those same searches in EVA at a later time. Once you have entered search parameters and search results have displayed, a save disc icon will appear to the left of the virtual keyboard icon. Once you click on the icon a pop-up text box will appear which allows you to name the search parameters. After naming your search parameter click "Add" and that search parameter will appear in the "Select Saved Search" dropdown which can be found above the "Keyword" text box.
    - After you have entered in a search term or selected a filter(s) a list of results will appear. You may sort the number of items shown per page by choosing either 50, 100, 200, 300 or 500 items per page, 50 is the default.
    - The items listed in your search results can be viewed by list view, brief view, or full view.
        - List view includes basic information about each title in the search results list.
        - Brief view includes similar details along with an image of the front cover of the title.
        - Full view adds a description of the item if available.
    - Within the Title Search Results list you may filter the results further by Product Type, Product Format, Country, Language, and Subject. Please note this will only filter the results from your initial search.
    - Information included in Title Search Results is:
        - List View:
            - Product #:
                - This represents the East View Information Services internal Product #. You can use this number to search within your Order and Invoice search to determine if you have already ordered or purchased selected item(s).
            - Title in transliteration
            - ISBN/ISSN
            - Series #:
                - If the title is part of a series the East View product # of that series will display here

        - Publisher in transliteration
        - Year:
            - Year of Publication
        - Country:
            - Country of Publication
        - Language:
            - Language of the Item
        - Product Type:
            - Atlases, Books, Maps, Serials, and Video
        - Product Format:
            - Microform, Online, Print, and Digital (CD/DVD/Blu-ray)
        - Price:
            - Price of item will be listed in USD. If “inquire” link is shown you will be asked to fill out a “Price Inquire” form and a notification will be sent to our customer service team who will reach out to you per the email listed on your profile.
        - Ordered:
            - This column will indicate whether or not you have ordered the item (yes or no).
    - Brief View: Additional information not included in the regular List View.
        - Title in Original language
        - Title in Transliteration
        - Title in English
        - Author: Main author of the work will be listed.
        - Subject: Any subject associated with the item will be listed.
        - Pages: Total page numbers of the item.
        - Image of front cover
    - Detailed View: Same information included in List View with Image plus description of the item if available.
    - Above the “Title Search Results” you will see tool icons and by hovering your mouse over them a tool tip will appear. Please note that all these tools work similarly in that you must select a product(s) by clicking on the check box next to them in order to take action.
        - Print:
            - This tool allows you to print a list of selected products from the results list of your Title Search.
        - Download Results:
            - This tool downloads and exports to an Excel spreadsheet the products you have selected.

- Add to My List:
    - This tool gives you the ability to add the selected product(s) to a customizable list that can be saved and edited at a later time.
    - If you check the box next to "Add to Existing List" you will then be able to choose an existing list that you have created to add your selected product(s). Once you have chosen the list click "Add."
    - If you wish to add the selected product(s) to a new list do not click the box next to "Add to Existing List." Instead type in a Name and short Description and then click "Add."
    - If you do not want to add the selected product(s) to any list, simply click on "Cancel."
- Send to Library:
    - This tool will direct you to a pop-up that asks for Email Address/Subject/Notes to be filled in. Simply enter in the necessary data and click "Email Selected Items."
- Add to Cart:
    - By clicking this the selected item will be added to your shopping cart.

Notifications:

- Subscribe to Serial Updates Lists:
    - This function allows you to subscribe to serials updates lists either by Region or by Serial Format. Simply click on the check boxes that you want to subscribe to and click "Submit."

Orders:

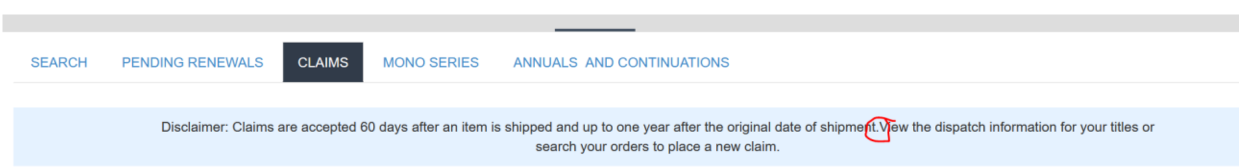
- Search:
    - All of the search functions within "Order Search" can be utilized by themselves or in conjunction with one another.
    - Title: This search function allows you to search your Orders to determine if a specific title has been ordered by your institution. You may search by title or leave blank for a global search.
    - Product Type:
        - Allows you to filter your orders by product type

        - (Atlases, Books, Collections, Databases, Maps, Serials, Services, Video)
  - Product Format:
    - Allows you to filter your orders by product format
      - (Microform, Online, Print, CD/DVD/Blu-ray)
  - Order Date Range:
    - By clicking on “From” and “To” a calendar tool will pop up and you can choose a date range to search within for your orders.
  - Subscription Period:
    - By clicking on “From” and “To” a calendar tool will pop up and you can choose a date range to search within for your orders.
  - Order Status:
    - Invoiced, Back Order, Cancelled, Returned
  - Order Type:
    - Firm Order, Approval Plan
  - PO Number: The default search index in this field will be “PO.” If you click on the down arrow next to PO a list of other options will appear including: Author, ISBN, Publisher, Product #, and PO Number.
  - Subject:
    - By clicking on “Subject” a pop-up list will appear that includes all available subjects that can be searched within EVA. The subjects will be divided into categories by Product Type.
      - Books, Serials, Databases:
      - Atlases:
      - Maps:
      - Video:
    - In the Subject pop-up list you can select as many subjects as you wish by selecting the check box next to the subject.
- Pending Renewals:
  - Subscription Period:
    - Enter your “From” and “To” parameters for subscription period
      - By clicking on “From” and “To” a calendar tool will pop up and you can choose a date range to search within for your orders.
  - Creation Date:
    - Enter your “From” and “To” parameters for creation date of renewal
      - By clicking on “From” and “To” a calendar tool will pop up and you can choose a date range to search within for your orders.
  - Status:

        - The default search index in this field will be "All." If you click on the down arrow next to All a list of other options will appear including: Pending, Saved, and Submitted.
    - Product Format:
        - Allows you to filter your pending renewals by product format
            - Microform, Online, Print, CD/DVD/Blue-ray
    - SubAccounts:
        - This search index allows you to choose from all of the SubAccounts associated with your account. Click the "SubAccounts box and a list of all SubAccounts will be shown in a pop-up. By clicking the box next to one or more of the SubAccounts and clicking "Ok" the system will search for all invoices that are associated with your choices.
    - Once you have entered search parameters under "Pending Renewals" you can search by either "View by Line Item" or "View by Invoice."
        - View by Line Item:
            - When viewing results under "View by Line Item" make sure to read the messages listed above the results list:
                - "If you wish to cancel a title, please change quantity to 0 and submit your changes."
                - "Items with red borders represent information which you have changed/updated."
                - "Line items in pink represent items for which your change request is pending. These will be updated in our system within 1-2 business days."
            - Information that will be included in the "Renewals for Confirmation" results list is (please note that you may print and/or download the results in your search parameters by using the Print and Download tool icons next to the "Submit" button at the top of your search results):
                - Renewal #:
                - Product #:
                - Qty:
                - Title:
                - From Date:
                - To Date:
                - PO:
                - Bill-To:
                - Ship-To:
                - List Price:
                - Disc %:

            - Total:
        - By checking the box at the upper-left of the results list you will select all line items. You may also select specific line items by checking the box to the left of each item.
        - A selected line item(s) may be cancelled by changing the "Qty" to 0.
        - You may also edit the PO, Fund, and Location fields.
        - Once you have made the necessary edits to your Renewals click on the tool icon.
    - View by Invoice:
        - After clicking on "View by Invoice" a list will result under "Existing Orders for Confirmation."
            - (please note that you may print and/or download the results in your search parameters by using the Print and Download tool icons next to the "Submit" button at the top of your search results)
        - Information that will be included in the "Existing Orders for Confirmation" results list is:
            - Renewal #
            - Date
            - Bill-To
            - Ship-To
            - Status
            - SubAccount
            - Total
            - Action
- Claims (for claiming items previously ordered, this will send a message to the internal East View team for further processing):
    - You can search claims by Title, Status, Product Type, PO #, and Date Entered
    - Once you have entered search parameters click search and your results will appear. Under "Action" you may click "Claim" and this will send a message to our internal team for further action.

Note: Missing space in between sentences in the Disclaimer message



- Mono Series:

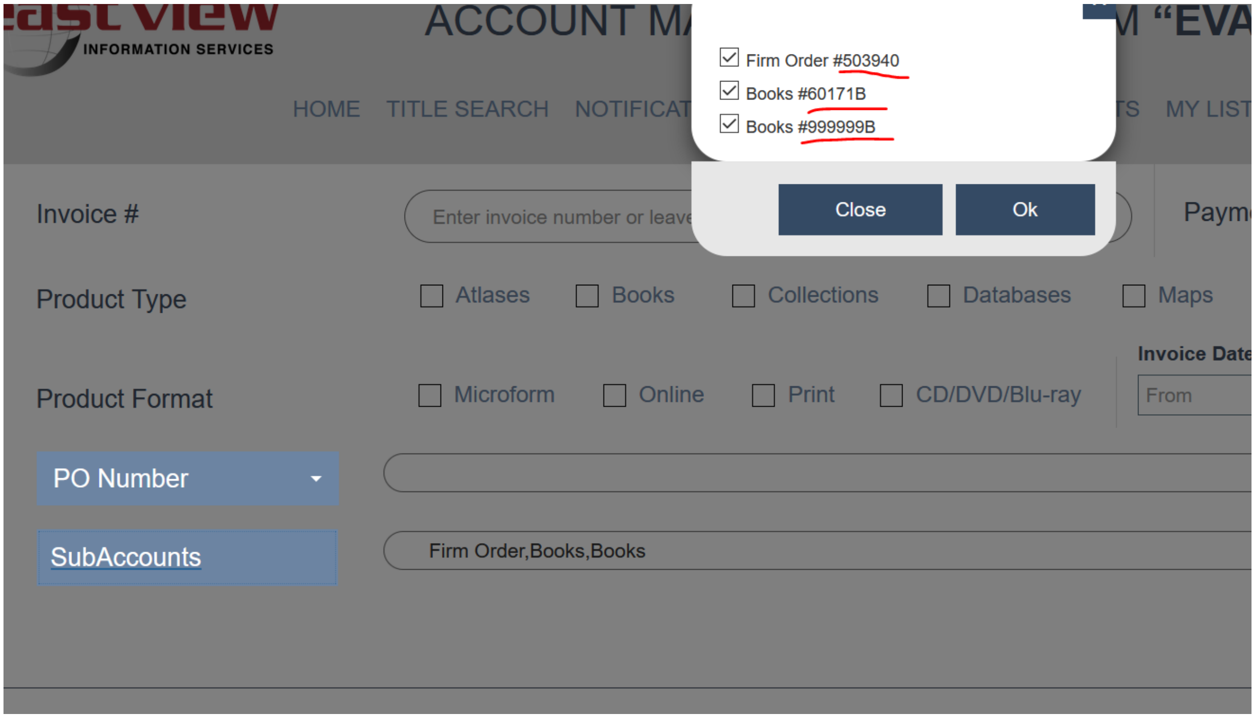
    - Here you can search by Title, Order Date, and Product Format. There is an additional filter for PO Number, Author, ISBN/ISSN, Publisher, and Product #
- Annuals and Continuations:
    - Here you can search by Title, Order Date, and Product Format. There is an additional filter for PO Number, Author, ISBN/ISSN, Publisher, and Product #
    - The results from your search will display the:
        - Order Date
        - PO
        - Product #
        - Series Title
        - Country
        - Product Format
        - Orders From
        - Last Issue Shipped
    - There is a page count list at the top of the results list if you wish to skip to later pages in your results.
    - You can display 50, 100 or All item results on one page by clicking the dropdown arrow next to the "Item per page" text above your results list.

Invoices:

- Invoice #:
    - All of the search functions within "Invoice Search" can be utilized by themselves or in conjunction with one another.
    - You can enter in an Invoice number here and you will be shown a list of matching results. If you leave the search field blank a list of global results will be displayed.
    - To search, click inside the text box "Enter invoice number or leave blank for global search," type in your Invoice number and click "Search" or hit Return on your keyboard.
        - If you wish to search for multiple invoice numbers put a comma and a space after each number.
- Payment Status:
    - By checking the box next to either "Unpaid" or "Paid" you can search for your invoices by their payment status.
- Product Type (Search Options):
    - Atlases, Books, Collections, Databases, Maps, Serials, Services, and Video are filters you can choose for product type to limit your results.
- Product Format (Search Options):

    - Microform, Online, Print, CD/DVD/Blu-ray are filters you can choose for product format to limit your results.
- Invoice Date:
    - Click on “From” or “To” or both and choose a date from the calendar pop-up to search for your invoices within a given date range.
- Subscription Period:
    - Click on “From” or “To” or both and choose a date from the calendar pop-up to search for your invoices within a given subscription period range.
- PO Number Dropdown (Search Options):
    - The default search index in this field will be PO Number. If you click on the down arrow next to PO Number a list of other options will appear including: PO Number, ISBN/ISSN, Title, Product #, and Country of Publication.
    - Click inside the text box in the same way you would in “Invoice #” and enter your search parameter.
    - Note that if you wish to search using multiple parameters within the “PO Number” dropdown you can click the + sign to the right of the text box to add more.
- SubAccounts:
    - This search index allows you to choose from all of the SubAccounts associated with your account. Click the “SubAccounts” box and a list of all SubAccounts will be shown in a pop-up. By clicking the box next to one or more of the SubAccounts and clicking “Ok” the system will search for all invoices that are associated with your choices.

Small quibble: See screenshot below – To me it would make sense to include the full SubAccount name in the SubAccounts field (i.e., Books #60171B), as otherwise there is no way to differentiate between the two books SubAccounts after they are selected and displayed in the bar. Or does that not matter?



- After you have entered search parameters a results list will appear. You may sort the number of items displayed per page by choosing either 50, 100, or all.
- On the upper-right side of the Invoice Search results there are tool icons to "Print results" and "Download results" into an Excel spreadsheet.
- To the upper-right side of the Invoice Search results you will also be able to navigate between pages of your results list by clicking on the number of the page results list or by using the backward and forward arrows.
- The Invoice Search results list will include data about each invoice that is found including:
    - Invoice #:
        - East View Invoice #
    - Invoice Date:
        - The Invoice Date represents the date that East View created the invoice.
    - Institution:
        - The name of your institution.
    - Department (Section):
        - The name of the department that the Invoice is associated to within your institution.
    - Payment Status:
        - Status will be listed as Paid or Unpaid.
    - Currency:

        - USD is default
    - Invoice Total:
        - This total includes the cost of the products and shipping.
    - Total Paid:
        - This total represents the amount that has been paid by your institution on the invoice.
    - Balance Due:
        - This number represents any balance that is due on the invoice.
    - Ship ID:
        - This ID is the East View Shipping ID associated with the invoice. Our internal "Ship-To" number is associated with the SubAccount the invoice falls under.
    - Shipping Address:
        - Address to which the invoiced products have been shipped.
- By clicking on an Invoice # (link in blue text) a copy of your invoice will appear. This invoice will have the same information that has been included on invoices you have previously received either via email or through physical mail. Click "Download" at the bottom of the invoice and a PDF version of the invoice will automatically download. If you wish to close the invoice simply click "Close."
- If you have any questions or concerns please use the "Contact Us" form at the bottom of the page or send an email to eva@eastview.com and our EVA team will be happy to assist.

Reports:

- In the future more reports will be available but as of October 2020 you may get results for your Approval Fulfillment Report.
    - East View will add data for all active approval plans for your institution and real-time data will be available.
    - By clicking the drop-down menu by "Approval Plans" you can choose which approval plan you wish to view the report for.
    - The information provided for your approval plans will be:
        - Bill-to/Ship-to, Geographical Coverage, Subject Coverage, Language, Fiscal Year, Budget, Invoiced, Shipping, Balance and whether or not Shipping is included in "Budget" and "Balance"
    - The results from your approval plan reports can be printed or downloaded to an Excel spreadsheet by clicking on the icons on the upper-right of the results list.

My Lists:

- “My List” allows you to create customized lists of products from East View that you have either searched for in the Title Search tab or through the Order Search tab.
- When you click in to My Lists you will see a results list of any lists you have previously created and saved. You can click on the check box at the top or next to each list you have created and once selected you can take an action on that list. To the upper right of the screen you will see two tools, Print and Download (to Excel). Please note that only lists you have checked will be acted on by these actions.
- By clicking on “Create New List” you will create a new list and type in a description of that list. If you click “save” your new list will be added to My Lists. However, if you click “Save and Search” you will be directed to the Title Search page where you can search for titles to add to your new or existing lists.
- To the right of the Name/Date/Description of your “My List” results you will see two additional options under the “Action” column. These actions allow you to edit the list you have clicked next to or to completely delete that same list. Please be aware that if you delete a list it will be permanent.
- Once you have created a list you can view more detailed information and take further action if you wish. If you click on the “Name” of the list you wish to view, a pop-up screen with a list of all products you have added to the list will appear.
    - Within this screen you can select all products or single products by clicking on the check boxes to the left.
    - Once you have chosen a product(s) within this list you may delete that product(s) by clicking “Delete,” this will simply delete that product from your list.
    - “Add to Cart” will add the checked item to your shopping cart for purchase.
    - If you click “Add Items” you will be re-directed to the Title Search page from which you can search for more products to add to a list. Please note that regardless of whichever list you have arrived to the Title Search page from, you can choose a product and then direct that product to any of your saved lists.
    - To the upper right of the pop-up screen you can also click on the tool icons for Print and Download to Excel. The Print option will print the list of selected items from your list. The Download tool exports the products you have chosen to Excel with all the associated data included with the product.
- “Saved Carts” allows you to save any number of items found while searching in the Title Search function. If you want to save items to your shopping cart for purchase at a later time you can search for items, save them to your cart and then within the shopping cart tool click “Save My Cart” at the bottom of the “Review Items” step. This saved cart can then be accessed and edited.

My Library:

- Approval Plan Profiles:
  - Here you will see stored Excel spreadsheets with data on your Approval Plans. These will be added in by internal East View team and can be edited by the East View Books department if necessary, please contact books@eastivew.com email address with questions.
- MARC Record Profiles:
  - Content is coming soon
- License Agreements:
  - Here you will see stored documentation regarding license agreements for online products your institution has purchased. Please contact online@eastview.com with any questions.
- IP Addresses:
  - Listed here will be the IP addresses that your institution has currently provided to East View. This enables your online content. Please contact online@eastview.com with any questions.
- My Funds:
  - If your institution uses Fund Codes, East View will store those in this dropdown for reference.
- My Locations:
  - If your institution uses Location Codes, East View will store those in this dropdown for reference.
- My Subaccounts:
  - Any "SubAccounts" that are associated to your account will be saved here.

Also, make change on platform to "SubAccounts":

- Usage Statistics:
  - Click here to request usage statistics from your database subscriptions. This will send a message to our internal East View team to generate those statistics and send to your institution. Type in a Name, Subject and Notes and then click "Submit."
- Library Email:
  - Please provide an email address for your institution that is the best for East View to use to contact you if any questions arise.

Footer:

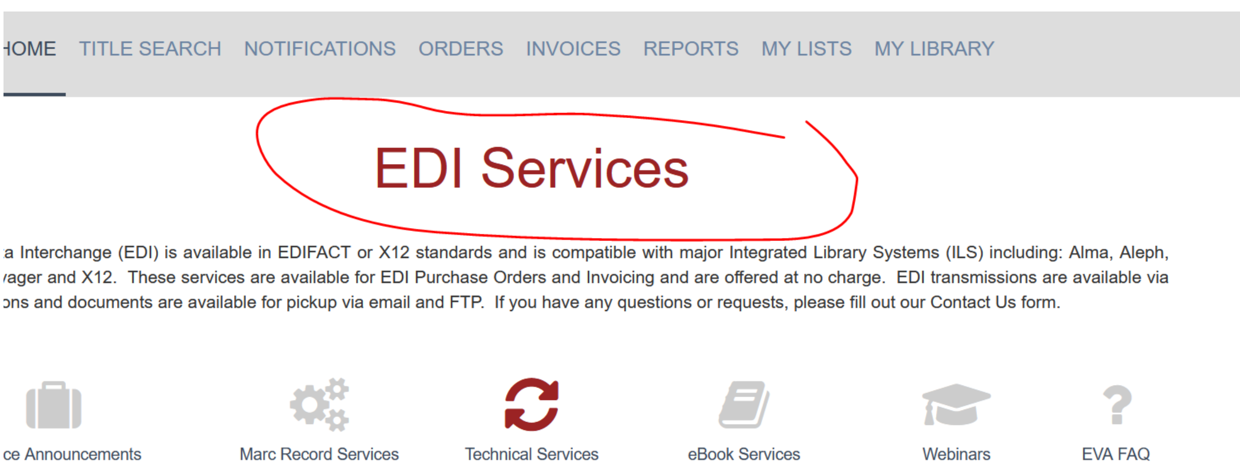
- The footer of the EVA site includes several useful links. These links can also be accessed on the EVA "Home" page.
  - Service Announcements:

    - General information about EVA and any relevant announcements to be aware of.
- Marc Record Services:
    - An overview of Marc records services available from East View.

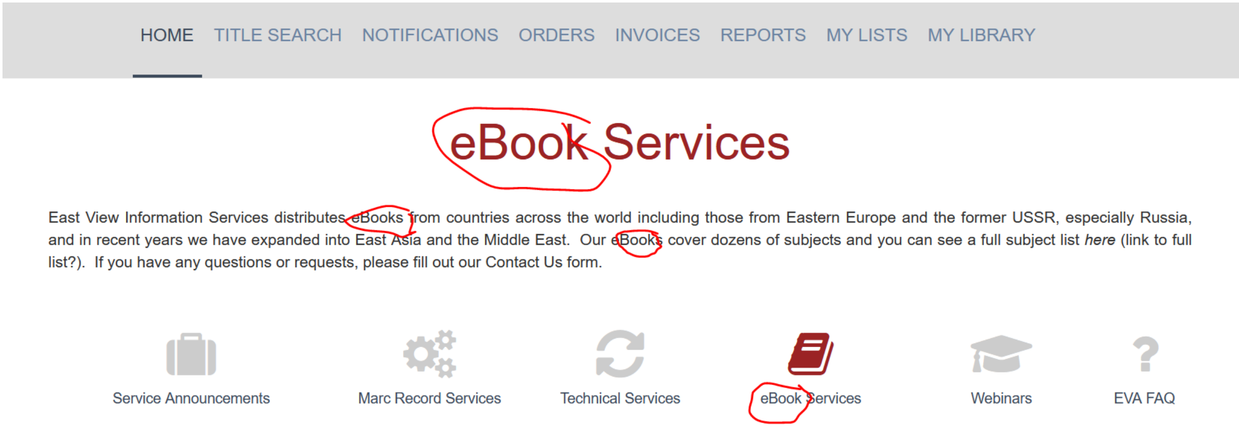
Why use “Svc.” here and not the full word “Services?”

- Technical Services:
    - An overview of EDI services available with East View.

Why is this section not titled “Technical Services”? Or, alternately, if this section really only deals with EDI, why not switch title of section in footer and on home page to “EDI Services”?



- eBook Services:
  - An overview of e-book services available with East View.



- Webinars:
  - More information to come
- EVA FAQ:
  - More information to come

- Contact US:
  - Online form to fill out with general questions.
    - Fill out your name, subject and notes and an email will be sent to the EVA team.
- East View Companies:
  - More information to come
- Social Media Icons (Facebook, Twitter, Google Plus, LinkedIn):
  - These icons will direct you to East View social media sites.

General Comments from Ana:

Where will this User Guide live? Will it be its own html page, or a PDF download? I would suggest that either way you consider adding some visuals to the User Guide. On a small screen, it was challenging to read the text and also view the platform at the same time – it would have been nice to at least see the landing pages for all these various modules within the document, instead of continuously flipping back and forth. Same goes if it exists as a web page – there is so much information here it became difficult to keep track of where I was at every time I went back to look at the platform. Plus, it would help to add some natural visual breaks and navigation to the dense text. See what we did for the Al-Ahram user guide (https://www.eastview.com/al-ahram_userguide/) – maybe there are elements from this that you can borrow? We can help with formatting.