RightFind Business Intelligence User Guide

Contents

Overview

Thank you for choosing RightFind Business Intelligence --the usage, spend, and value analytics module of RightFind. This product is designed to provide tools to help you

- save time gathering and analyzing data;
- measure the ROI of your content expenditures;
- make data-driven strategic purchasing decisions; and
- demonstrate the value of information management throughout your organization.

This guide provides an overview of the reporting and budgeting tools available to you through this module. For best results when navigating through this module, we suggest using Google Chrome.

General Functionality

Navigation

Navigation across the Business Intelligence reports can be managed from the navigation bar which will be in the open position when the reports are initially launched. It will remain on the left side of the page as you move from one section to another and can be opened with the open arrow icon at any time.

Legends

The graphs in the RightFind Usage & Spend and COUNTER reports are interactive and can be manipulated in various ways. Toggle between the charts in the RightFind Usage and Spend report to display different graph types. Additionally, click the attributes in the chart legends throughout the reports to show or hide a specific item.

Exporting

Each section of these reports can be exported individually using the icon at the top right of each title bar. Depending on the type of information, the section will be exportable in the following formats: PNG (image), PPTX (PowerPoint), or CSV (Excel). Additionally, whole reports can be exported as PDF or CSV. Individual charts that are minimized will not appear in the whole report export.

Budget Health Check Report

This report opens by default when you first access the Business Intelligence tab within RightFind. It is designed to provide a high-level overview of the health of your content portfolio using predictive analytics, as well as data from RightFind and your systems.

The Budget Health Check report, specifically the Document Delivery Forecast graph and Subscriptions heatmap, allows you to set preferences in the Report Options to view different data sets. By default, the report will show data for the entire organization, but can be limited to specific departments, divisions, locations, and countries. Once a business unit type is selected, one or more selections can be made by scrolling through the alphabetized list or by typing in the selection, which will autocomplete.

In addition, you can make changes to your subscriptions analysis by updating the Subscriptions Analysis Settings, which include:

- Breakeven Threshold: This threshold is set to refine which titles appear in the heatmap and breakeven analysis based on the subscription cost relative to document delivery as an alternative. A percentage under 100% will limit the list to titles where document delivery may be more cost effective. A percentage above 100% will also include titles where a subscription may be more cost effective. You may use the parameters in the report options to set a threshold that represents your organization's standard for subscription health. The default is 100%.
- Usage Conversion Rate: This rate is set to predict change in usage when switching from a subscription to document delivery. For example, if you set the percentage under 100%, you may anticipate a drop in usage when users see a price associated with access to an article. So, if you expect usage to go down 25%, you would set the conversion rate to 75%. The default percentage is 100%.

Once you have made your choices, you can click "Run Report" which will update the reports directly on the page, and click "Export" to see the relevant data in a PDF.

Please note: Any changes you make in Report Options will automatically apply to the Working Budget Title Analysis. Click here for more information.

Document Delivery Forecast

This graph represents actual document delivery spend for the current year (black), linear (blue) and seasonal (green) forecasts, and the amount budgeted for the year (orange). The seasonal extrapolation is calculated by looking at seasonal variations from the previous year. Please note that the spend tracks all RightFind orders that have a fee. This may include internal orders if any fees apply. This data is updated daily.
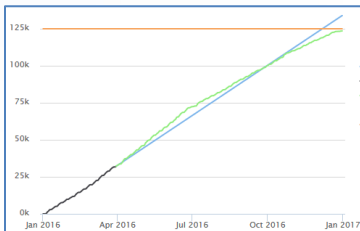
You can also view the Top Document Delivery Titles by clicking on the link directly under the export button. To learn more about this chart, click here.

Subscriptions Heatmap

This table provides a high-level overview of the health of your subscription portfolio. It shows publications that fall below a breakeven threshold when compared to estimated document delivery costs for the same content in the current year. In this rolling 12 months heatmap view, the darker the red shading, the further away the title is from the breakeven point.

The monthly percentage numbers provide a cost estimate for purchasing the subscribed content through document delivery. For example, if the percentage for January is 50%, it would cost half as much to purchase the articles for a given title through document delivery. The titles displayed are limited to titles where the percentage for one or more months during the period is below 100%. (i.e. where document delivery would cost the same amount as the subscription.) As mentioned here, your chosen threshold can be set in Report Options.

5/16	6/16	7/16	Average
148%	49%	0%	68%

You can also get more detailed analytics by clicking on View Title Breakeven Analysis directly under the export button. To learn more about this chart, click here.

Tokens

The health of each token package is represented by a bar which estimates the depletion date and associated overage or shortfall in the account. The bar displays how many tokens have been used year to date and how many tokens remain. If the tokens will not last through the end of the year based on your consumption rate, a green dotted bar estimates how many more may need to be negotiated by you or your agent. If the tokens will expire before they are all used, a red dotted bar will forecast how many tokens will be lost at the current usage rate. Hovering over the bar provides this

information textually. Please note that these numbers are based on token usage through RightFind activity unless publisher statistics are available.
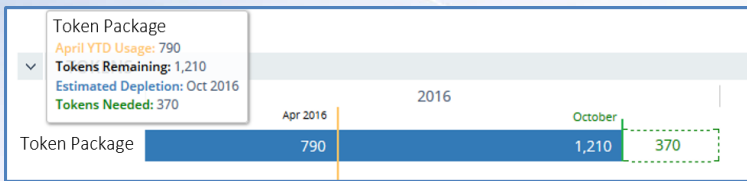
COUNTER Reports

The RightFind Business Intelligence system harvests COUNTER data across publisher platforms using SUSHI. The data is quality checked, normalized, and fed into COUNTER trend reports. Currently, there are three COUNTER reports: COUNTER Journals Report, COUNTER Books Report, and COUNTER Databases Report.

COUNTER Journals Report

The COUNTER Journals Report can be viewed in aggregate at the publisher or publication level. Usage may be viewed in total or limited to just PDF or HTML views. The date range and number of results can also be set to show specific data.

Publisher View

If you select publisher level, the following graphs will be showcased:

Publisher to Publication Drill Down
The first visualization is a tree map of the data which allows for a cursory view of relative usage across publishers. For example, you may observe that your top 5 publishers make up more than half of total usage.

By clicking on any one of the publisher blocks, you will see which titles make up the most of the usage, or how widespread usage might be in larger packages. Hovering over a section will provide the number of downloads that section represents.
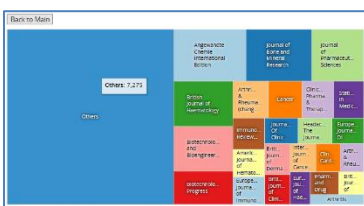
Top Publishers by Usage
When the report is run for all usage types this bar graph will show a breakdown between HTML (light blue), PDF (dark blue), and any other usage a publisher might report which we have labelled as 'Unspecified' (green). Mobile usage is an example of unspecified data. Another example is the absence of an HTML/PDF breakdown available from a publisher. The legend can be clicked to hide or show the different usage types.
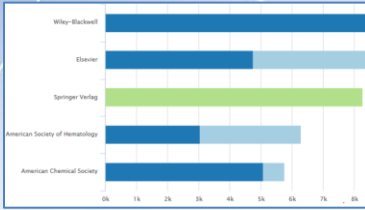
Total Usage Across All Publishers

This column graph shows aggregated data by month and is one way to observe how seasonal trends may affect usage across your organization.

Publications View

If you select publication level, the following graphs will be showcased:

Top Publications

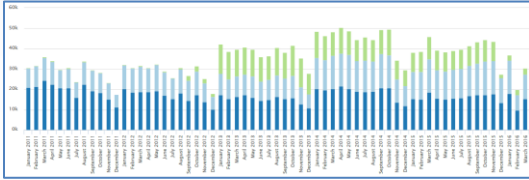When the report is run for all usage types this bar graph will show a breakdown between HTML (light blue), PDF (dark blue), and any other usage a publisher might report which we have labelled as 'Unspecified' (green). The legend can be clicked to hide or redisplay the different usage types.
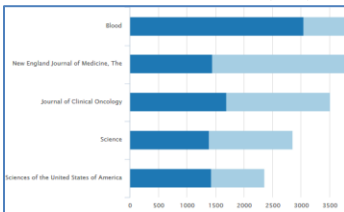
Top Publications as % of all COUNTER Usage

This graph can be viewed as a stacked area or a percentage area by using the toggle in the top left. It provides a visual representation of the percentage of total usage the top journals make up and alternatively, what percentage or usage the rest of the journals account for. Additionally, it lets users visualize how these trends change over time to provide insight into fluctuations in demand for journals.
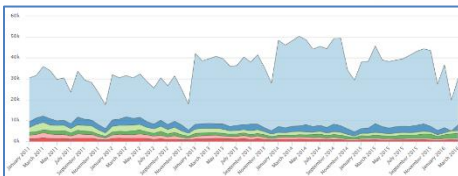
COUNTER Books Report

When you run a report for books COUNTER data, you can choose parameters for the data you see in Report Options. You can select the date range by typing it in or by clicking the calendar icon. From the calendar pop-up, quick navigation to older months or years can be achieved by clicking the month and then the year at the top. You can also choose the number of results in each section with an option of 5, 10, and 25. Once you run the report, you will see two graphs – Top Book Usage by Publication and Top Book Usage by Publisher.

Top Book Usage by Publication

This graph shows the top book publications by usage. This graph can be viewed in multiple ways including donut, pie, stacked column, and year-over-year bar graph. The legend can be clicked to hide or redisplay the book name.
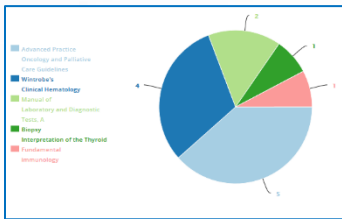

Top Book Usage by Publisher

This graph shows the top publishers by usage numbers. This graph can be viewed in multiple ways including donut, pie, stacked column, and year-over-year bar graph. The legend can be clicked to hide or redisplay the publisher names.

COUNTER Databases Report

When you run a report for database COUNTER data, you will see two graphs – Database Usage by Database and Database Usage by Vendor.

Database Usage by Database

This graph shows database usage numbers. This graph can be viewed in multiple ways including donut, pie, stacked column, and year-over-year bar graph. The legend can be clicked to hide or redisplay the database name.
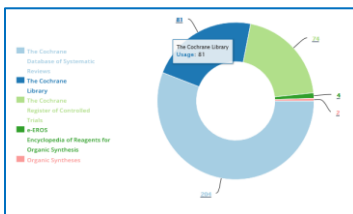
When in the donut or pie view, you can get a more detailed display of the types of usage for each database. If you click on a section in the graph, a new graph will be created that breaks down the usage into specific types including Federated Automated Searches, Record Views, Regular Searches, and Results Clicks. To go back to the original view, just click on the "Back to Usage" button.
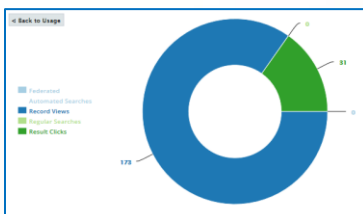
Here are the definitions for each of these terms. (*Source: projectCOUNTER.org*)

Federated Automated Search: A search from a discovery layer or similar technology where multiple databases are searched simultaneously with a single query from the user interface. The end user is not responsible for selecting which databases are being searched.

Record Views: A Successful Request (successful requests are those with specific return codes, as defined by NCSA Common Log format) for a database record that has originated from a set of search results, from browsing the database, or from a click on another database record. (Only full database records may be counted, not Previews of Records).

Regular Searches: A user-driven intellectual query, typically equated to submitting the search form of the online service to the server.

Results Clicks: A click originating from a set of search results.

Database Usage by Vendor
This graph shows database usage numbers by vendor. This graph can be viewed in multiple ways including donut, pie, stacked column, and year-over-year bar graph. The legend can be clicked to hide or redisplay the vendor names.

When in the donut or pie view, you can get a more detailed display of the types of usage for each database. If you click on a section in the graph a new graph will be created that breaks down the usage into specific types including Federated Automated Searches, Record Views, Regular Searches, and Results Clicks. To go back to the original view, just click on the "Back to Usage" button.

Non-Standard Reports
RightFind Business Intelligence also provides Non-Standard Reports usage data for publishers that do not currently provide their usage metrics in COUNTER standard formats. At this time, there is one database in this report: CAS SciFinder. This report offers usage data by city and top users. Our implementation team can help set up this report for your organization.

RightFind Usage and Spend Report
The RightFind Usage and Spend report can be configured in the Report Options to view different data sets. By default, the report will show year to date data for the entire organization. The report can be limited to different departments, divisions, locations, and countries because of the granular usage details captured through RightFind. Once a unit type is selected, one or more selections can be made by scrolling through the alphabetized list or by typing in the selection which will autocomplete. The date range can be changed by typing it in or by clicking the calendar icon. From the calendar pop-up, quick navigation to older months or years can be achieved by clicking the month and then the year at the top. Lastly, the number of results in each section that will appear in the report can be limited to 5, 10, and 25.

The information in this report presents a snapshot of your information environment based on usage and spend captured through RightFind. The report presents data elements such as top journals and top users by copies and spend, where copies represent all copies acquired through RightFind – whether through document delivery, tokens or a subscription – and spend represents all copyright and transactional costs incurred through the platform.

Copies and Spend by Source

These graphs provide visual representations of the various sources used to fulfill end-user requests and associated costs. The vast majority of the spend will be on document delivery, but any transactional or service costs incurred for other sources will be reflected here (e.g., Ends of the Earth service).
The sources are:

- Copyright Permissions – permissions to reuse copyrighted content
- Digital Library – reuse of content purchased within the organization covered by your annual copyright license (not intended to replace the need for subscriptions)
- Document Delivery – purchase of content otherwise not available from internal sources
- Open Access – documents or links delivered to articles in customer's or CCC's Open Access collections
- Shared Libraries – content shared between users under the terms of the annual copyright license
- Subscriptions – use of subscribed content
- Tokens – use of prepaid articles managed through the RightFind platform
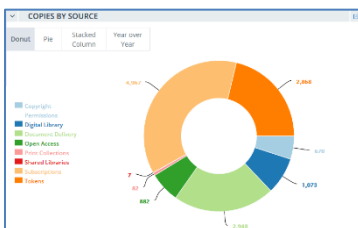
Copies and Spend by Publisher

These graphs are limited to the top 10 results, with the rest grouped into the category, "Other". The copies by publisher graph shows which publisher's content, whether accessed from a subscription or document delivery, is in most demand through the RightFind platform. The spend by publisher graph shows how the money spent on document delivery is divided by publisher.
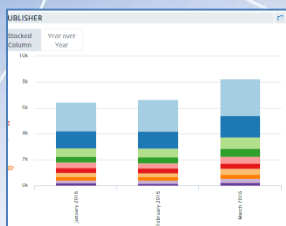
Copies and Spend by Intended Usage

These graphs provide different visuals for which types of use, or rights aliases, are selected when content is acquired through the platform and how that use relates to document delivery spending.

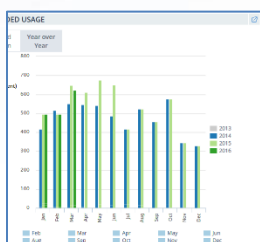## Top Users by Copies and Spend

These tables provide a list of the top users, their department, division, number of copies or amount they have spent, and a sparkline for the selected period. The sparkline shows if the usage or spending has been consistent and if there have been any peaks or valleys. Hovering over it will provide monthly values.

#	Top Users	Division	Therapeutic Area	Spend	1/1/2015 - 3/31/2016
1	User82@pharmaco.com	Division 166	Department 18	$4,883	
2	User7@pharmaco.com	Division 13	Department 143	$4,054	
3	User139@pharmaco.com	Division 117	Department 137	$2,511	
4	User490@pharmaco.com	Division 298	Department 126	$1,928	
5	User173@pharmaco.com	Division 207	Department 224	$1,821	

Top Journals by Copies and Spend

The top journals by copies table provides a list of the top journals used through the platform, regardless of source. The top journals by spend table lists those specifically purchased through document delivery. This list is a good indication of titles that should be considered for subscription.

Top eBooks by Copies and Spend

These tables are the same as those for journals (detailed above) but are limited to eBooks acquired through the platform.

Niche Resources for this Business Unit

This section will only appear when the report is run for one or more specific business units. The niche resources report highlights potential chargeback or site licensing opportunities. The table provides a list of publications that are more heavily used in the selected units compared to the rest of the organization. The table provides information on how many

copies are used within the selected units and the rest of the organization, as well as how much each group has spent on these resources. An area graph provides the percentage of total spend the selected business unit(s) comprise. This table is sorted by percentage spend in descending order, prioritizing publications that are mostly or entirely used by the selected business unit(s).

| #	Publication	Copies within business unit	Copies across rest of organization	% Copies	Spend within business unit	Spend across rest of organization	% Spend	1/1/2015 - 3/31/2016
	NICHE RESOURCES FOR THIS BUSINESS UNIT							
1	Publication Title 1	16	0	100%	$56	$0	100%	
2	Publication Title 2	12	0	100%	$39	$0	100%	
3	Publication Title 3	14	0	100%	$37	$0	100%	
4	Publication Title 4	13	0	100%	$37	$0	100%	
5	Publication Title 5	14	0	100%	$36	$0	100%	

Value Analytics Report

In an effort to offer qualitative data in addition to quantitative data, RightFind Business Intelligence offers the Value Analytics Report to help knowledge managers gain insights about the value of the content being used. Some value indicators include the impact of usage on the research pipeline, which groups are requesting content the most, when content is being used, and user search queries. The data in the Value Analytics Report is limited to RightFind Enterprise due to the granularity it can provide.

When the Value Analytics Report is run, you can choose parameters for the data you see in Report Options. The data can be viewed by Resources with the option to choose a publication or publisher and also by Organization with the option to choose a specific business unit. You can also select the date range by typing it in or by clicking the calendar icon.

The report will be populated with the following elements when run by either Resources (publisher or publication) or Organization (business unit).

Usage Intensity

Usage Intensity shows all content usage occurring through RightFind, whether from a subscription, document delivery, or other sources in a monthly heatmap. This is similar in many ways to the Subscriptions Heatmap. You will only see this heatmap if you view the report by Organization. This map demonstrates when content is being used by the entire or segments of the organization during certain months or days. The darker the shade of green, the more usage occurred on that day compared to other days that month. The lighter the shade of green, the less usage occurred on that day compared to other days. This heatmap allows you to see top usage days of the week or month so that you can spot trends in usage and anticipate future spikes and support them accordingly.
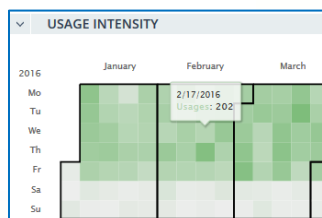
Usage Impact on Research Pipeline

This graph tracks content usage from either a selected publisher, publication, or business unit (depending on what view you are using) across the research pipeline. Your implementation manager will help you set up usage events or business unit against each research phase. Once assigned, whenever a mapped intended usage, user or business unit requests content, the graph will connect that usage to a particular pipeline phase. You may provide your own labels to identify each stage of the pipeline.
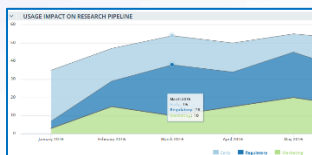
With usage numbers on the Y axis and dates on the X axis, your organization will be able to review when a publisher or publication is used or when a business unit is using content throughout product development. Was a particular publication used heavily during early research? Does the usage of one business unit have a significant impact on one pipeline stage? This information will allow you to understand more than just sum usage numbers, but also the value of that content in bringing a product to market throughout a defined time period.

Requests by Publication Title/Business Unit

Requests by Publication Title/Business Unit is a treemap that demonstrates which business unit is requesting content from the selected publisher or publication or the top requests by publication title (depending on what view you are using). This information allows you to better understand what segments of the organization are interested in content from a publication or publisher and what publication titles are being requested.

Common Search Terms Fulfilled in this Resource/Business Unit

This section of the Value Analytics Report features a word cloud that graphically represents the most common search queries in RightFind. A word cloud is a weighted list in a visual design. In the simplest terms, the larger the word the more often it was searched. The word cloud is made up of search terms in different sizes and colors. For each size a color is assigned, so if two words are both a certain color and size, this indicates they have been searched a similar amount of times. You will see this in both the Resources and Organization views, with the Resources view demonstrating the common search terms that have led to citations from that publisher or publication and the Organization view demonstrating the common search terms by business unit.

This information gives insight into topics that your organization's users are searching to help you identify content needs and potential gaps in subscription coverage. Additionally, it may prove useful in demonstrating the value of a publication or publisher in connecting important searches to their citations.

Strategic Search Terms Fulfilled in this Resource/Business Unit

This section of the Value Analytics Report features a tree map based on search terms you have deemed to be important to your organization. This graph is configured by working with our implementation team and identifying strategic terms and associated signals which have value to the organization. Once you decide on the search terms, you can associate signals to them so that any time these signals are searched, you will see the aggregated results. You will see this in both the Resources and Organization views, with the Resources view demonstrating the strategic search terms that resulted in

citations from that publisher/publication and the Organization view demonstrating the strategic search terms by business unit.

This tree map can demonstrate the value that the selected publisher or publication has in a certain area of interest to help you bring actionable data into your budgeting decisions.

360 Report

The 360 Report is a report that gathers all data and resulting analytics based on your search in one easy to review format. This report gives you a view into all usage for any publisher and/or specific publication – subscribed or unsubscribed.

In Report Options, you can choose to search a publisher or a publication as well as the fiscal year for which you want to view the report. If you choose a previous year, then you will see actual usage numbers for that year. If you choose the current year, you will see projected numbers for the entire current year. As with all Business Intelligence reports, you can export individual report elements or the entire report.

Publisher Breakeven Analysis

This section of the 360 Report will appear when you search for a specific publisher in Report Options. This breakeven analysis provides a high-level view of the status of that publisher including number of downloads, subscription cost, estimated document delivery costs, and the cost differential (difference between the subscription cost and document delivery costs). It also includes a trend line that allows you to see visually how the publisher is performing in terms of breakeven. If you click the trend line, a pop-up will appear with detailed information about that specific publisher including monthly usage information, a breakeven line, and a trend line.

You may see an orange information icon next to the publisher name. This indicates a lack of COUNTER data – either no data or incomplete data. This icon will direct you to the COUNTER Credentials page so that you can check-in on the most recent status of your COUNTER credentials. You can learn more about managing your COUNTER credentials here.

Package Breakeven Analysis

This section of the 360 Report will appear when you search for a specific publisher in Report Options and that publisher offers packages to which you are subscribed. These fields are the same as the publisher breakeven analysis including subscription usage, subscription cost, estimated document delivery costs, and the cost differential (difference between the subscription cost and document delivery costs).

It also includes a breakeven heatmap. In this 12 month heatmap view, the darker the red shading, the further below the breakeven point the title is and the darker the green shading, the further above the breakeven point. If there is no COUNTER data available, the month will be populated with grey diagonal stripes that indicate the absence of data. If you click the heatmap, a pop-up will appear with detailed information showing a larger version of the heatmap.

Publication Breakeven Analysis

This section of the 360 Report will appear when you search for a specific publisher or publication in Report Options. If you search by publisher, you will see all publications for that publisher for which you are subscribed. If you search for a specific publication, you will only see data for the publication you searched. In the subscription heatmap in the Budget Health Check Report, you will see a similar set of information, but only for titles that have fallen below the breakeven threshold. In the 360 Report, you will see all publications for that publisher regardless of if the publication is below or above break-even.

PUBLICATION BREAKEVEN ANALYSIS					
Publication ▽	2017 Forecasted Downloads ▼	2017 Subscription Cost ⬍	Estimated Doc Del Costs ⬍	Cost Differential ⬍	Trend
Publication 1	N/A	$7,253	N/A	N/A	
Publication 2	N/A	$2,325	N/A	N/A	
Publication 3	481	$9,263	$28,785	-$19,522	
Publication 4	127	$9,205	$7,415	$1,790	
Publication 5	104	$9,075	$4,508	$4,567	

This information is the same as previous report elements including subscription usage, subscription cost, estimated document delivery costs, and the cost differential (difference between the subscription cost and document delivery costs). Like the package breakeven analysis, it includes the same breakeven heatmap described above.

Document Delivery Usage

This section of the 360 Report will appear when you search for a publisher or a publication in Report Options. This report element provides forecasted annualized document delivery spend for unsubscribed content across either an entire publisher's portfolio (if you search a publisher) or specific to one publication (if you search by publication).

This document delivery usage report element can provide insights to support potential additional subscriptions by showcasing titles that have high document delivery fees. The report shows total document delivery copies, the average price per copy, and the document delivery fees. The document delivery copies are also visualized through a trend line. If you click the trend line, a larger window will appear with the information.

DOCUMENT DELIVERY USAGE				
Publication ⬍	2016 Doc Del Copies ⬍	Average Per Copy ⬍	2016 Doc Del Fees ▼	Trend
Publication 1	50	$64	$3,187	
Publication 2	47	$52	$2,461	

Publisher Turnaways

This report element provides insights into the number of times users are denied access (turned away) on a publisher's website due to lack of a subscription and the resulting document delivery as a percentage. By comparing the number of denials to the number of document delivery copies and calculating a conversion rate, you can better measure the value of content users are interested in.

PUBLISHER TURNAWAYS						
Publication	2016 Denials	2016 Doc Del Copies	% to Doc Del	Average Per Copy	2016 Doc Del Fees	Trend
Publication 1	12	3	25%	$52	$156	
Publication 2	3	0	N/A	N/A	N/A	
Publication 3	1	0	N/A	N/A	N/A	

Percentage of Total Subscription Usage Through RightFind/Subscription Usage Through RightFind

This section of the 360 Report will appear when you search for a publisher or a publication in Report Options. These report elements showcase two types of data:

1. **Percentage of Total Subscription Usage Through RightFind:** A pie chart that depicts the total usage of a subscription for the selected publisher/publication comparing the usage that happened directly on the publisher website with the usage that originated in RightFind. Since usage originating in RightFind is also measured by publishers the combined metrics are combined, but not duplicated.
2. **Subscription Usage Through RightFind:** A table that displays usage data for the publisher/publication with the ability to view the usage by User, Department, Division, or Location. Information included in this report element includes the number of copies, spend for the year specified, the subscription use through RightFind as a percentage, and the percentage of total use by users or organization unit, including content accessed directly through the publisher's website.

Budget Planning and Analysis Tools

This section of the software offers a suite of budget support tools and underlying data analytics to help you make strategic content acquisition decisions and to help simplify and improve the annual budgeting process. These budget planning tools include line items for journals, books, and databases.

Actual Budget

The actual budget section will display the budget you provided to CCC for the current fiscal year and budgets for subsequent years as they are finalized by your organization. These will serve as reference and will also be the starting point for working on the following fiscal year's budget. The "vendors" section can be expanded by using the arrow icon, and each vendor can also be expanded to see the various resources that comprise the budget. Additionally, this budget is exportable in Excel to facilitate communication with internal stakeholders or your appointed subscription agent.

Once you are ready to start creating a budget for the following year, click on "Create Working Budget for Next Year".

Working Budget

You may use this tool to create as many "what-if?" scenarios as you like. For example, "what will my budget look like if publishers raise prices by 3% next year?" or, "what if senior management asks me to reduce my budget by 5%?"
The working budget has multiple columns to support modelling and tracking activities:
- Current year's cost
- Forecasted cost for the following year
- Negotiated cost
- Net and percentage differences from the forecast year to the current year

	Current Year 2016	Forecast 2017 Estimate	Forecast 2017 Actual	Net Change	% Change	Actions
Total	$306,500	$306,500		$0	0.00%	

By default, the system copies values from the current year into the forecast year to save users time. In other words, the forecasted spend will appear with a 0% change at first and the negotiated cost will be blank. The net and percentage change will display the difference between the forecasted amounts and the current year until a negotiated price is entered and will then show the difference between negotiated and current.

Editing Modes and Actions

Using the icons in the upper right, you can take a variety of actions:

- Convert to edit mode
- Copy values from one column to another
- Apply percentage change to all items, i.e., global edits
- Save changes
- Cancel changes
- Export to excel (very handy to facilitate communication with your subscription agent, procurement, or senior management)
- Delete scenario
- View title breakeven analysis and potential subscription adds

There are two ways to edit the information in the working budget: global edit and line-edit mode. Both modes require users to save their work for the changes to apply.

Global edit mode: In this edit mode, the following items can be changed:

- The budget's title
- The forecast estimate for all items
- The negotiated cost for all items
- The percentage change for all items (percentage icon in the top right)

Line-edit mode is achieved by drilling down to the resource you need and clicking in the actions column at the far right. This will allow you to make changes to the forecast estimate and negotiated cost.

There are two other action buttons available in the rightmost column.

Cancelling a title: this allows you to mark a title for cancellation. This will zero out the cost for the following year and cross out the line item, but it will remain in the budget as a reminder or can also be changed back to be a renewal item if the outcome changes.

Adding a new title or publisher: this icon will allow you to add a new publisher or title to your collection.

Favorites

If you are working on multiple scenarios but would like one of them to always show up at the top of the list from inside the navigation menu, check the 'Set as Favorite' checkbox. If you would like to create a new scenario based on a working budget in which you have already made changes, you can click on "Save as New Scenario".

Create Final Budget

Once you have entered your negotiated costs and would like to finalize your budget, you can click on "Create YYYY Final Budget". If you need to make changes to the final budget at any point, you can simply click on "Replace YYYY Final Budget".

View Title Breakeven Analysis

This underlying breakeven analysis compares cost-per-use across content acquisition channels, helping information managers make strategic spending decisions. Breakeven is defined as the point at which purchasing the content through document delivery would be the same cost as renewing the subscription.

The calculations and thresholds used to populate the breakeven analysis can be edited in the Report Options as described on here.

The breakeven analysis can be viewed in aggregate (i.e., across all publishers) or for a specific publisher or publication. The analysis will pop up in a separate window with a table containing:
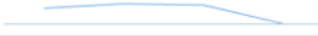
- List of titles
- Forecasted PDF downloads for the year
- Estimated subscription cost based on the forecasted estimate from the working budget
- Estimated cost of document of document delivery
- Estimated savings
- Number of total downloads to breakeven
- Sparkline of the usage against the breakeven point

	SUBSCRIPTIONS VS DOCUMENT DELIVERY BY PUBLICATION TITLE						
Vendor	Publication Title	2016 Forecasted PDF Downloads	2017 Forecast Subscription Costs	Estimated Doc Del Fees	Estimated Savings	Downloads Required to Breakeven	
Publisher	Publication	9	$1,300	$392	$907	30	

To view the analysis of all the subscribed titles which fall below the breakeven threshold (doc del = 90% of sub cost) you can click on the 'View Title Analysis' drop down at the top right and select 'View Title Breakeven Analysis'. To view the analysis for a specific publisher or publication which falls below the threshold you can click on the magnifying glass icon in the leftmost column.

View Top Document Delivery Titles

Titles that show up on this list could be good candidates for subscriptions. You or your agent might want to ask for a price quote to determine if any changes from your current acquisition method are necessary. Like the subscription breakeven analysis, this list of the top 25 document delivery titles by spend can also be viewed in aggregate or at the publisher level. The same icons used to access the breakeven analysis will also display the top document delivery titles. Please note that this list may include subscribed titles. Some reasons for this include: a site license may not cover the user ordering, the ordered article may be from a year or issue that falls outside the subscription range, or the right requested is not covered.

	TOP 25 PUBLICATIONS VIA DOCUMENT DELIVERY				
Vendor	Publication Title	Estimated Doc Del Copies	Average Per Copy	Estimated Doc Del Fees	
Publisher Name	Publication Title	324	$2	$639	

Administrative Tools

There are two tools that allow you to better manage your RightFind Business Intelligence account including a way to confirm that your account has the most up-to-date data (COUNTER Credential Management tool) and that you are up-to-date with all changes within your account.

COUNTER Credential Management

This section allows you to manage your COUNTER credentials in one place and confirm data availability and status. This tool allows you to create new credential listings with the following required information: Publisher Name, URL (which will be pre-populated), User Name, Password, and Report Types. You can also include your SUSHI ID and SUSHI Customer ID, which are not required to create a COUNTER credential in the system, but are highly recommended.

Once you have set up your COUNTER credentials in the system, you will be able to monitor each credential's status including whether they have passed, failed, or have never been executed. In addition, you will be able to see when the last available COUNTER data was fetched for each credential. This information will allow you to confirm your data is up-to-date so that the reports in the tool are telling the most accurate story.

Notifications

You can set up an email notification for the following:

- **New COUNTER data available:** This will notify you when COUNTER data has been updated in your account. You can receive this notification weekly, monthly, or quarterly. You can also set a day of week and time for delivery.
- **Subscription below breakeven:** This will notify you when a subscription has fallen below your set breakeven threshold. You can receive this notification weekly, monthly, or quarterly. You can also set a time for delivery.
- **Tokens running low:** This will notify you when your token balance (for a specific publisher) is running low. You can be notified in one of two ways: based on the number of months to depletion (e.g. you could set this for two months so you are notified when you have approximately two months left until your tokens have been used) or the percentage of tokens remaining (e.g. you could set this for 10% so you are notified when you have approximately 10% of your tokens remaining).

You can add a new notification, edit a current notification, and delete a notification at any time.