



# Consortia Manager

## **Un nouvel outil de gestion pour Couperin et ses membres**

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# 1/ Présentation générale

- **Startup danoise** fondée par Nels Rune Jensen et Tejs Grevstad de la **Danish Digital Library**
- Nov. 2014 : 1<sup>ère</sup> version Beta
- **37 pays** et **2500 établissements**
- Le concept :
  - un outil de workflow
  - un point central d'archivage pérenne
- **2 interfaces** : 1/ Consortium 2/ Membres
- Outil dédié aux consortiums fonctionnant en « **centrale d'abonnements** » ≠ fonctionnement décentralisé de Couperin



# 2/ Système de gestion actuel

## ERE

Ressources  
Abonnements  
Coûts

## Adhésion

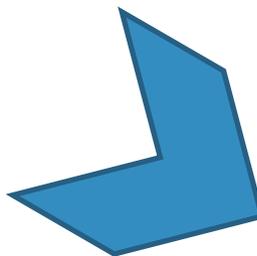
Etablissements  
Contacts  
Facturations

## Disque dur ext.

Archives

## Base de gestion

Ressources  
Négociations  
Etablissements  
Contacts



# Consortia Manager



# 3/ CoMan pour le staff et les négociateurs

- Amélioration du suivi des négociations : **workflows** et tableaux de bord

Task overview All contacts ▾

PLAN	NEGOTIATE	LICENSE	PUBLISH	LIBRARY INVOICE
Start renewals	Request pricing 40	Review content 12	Publish agreements 8	Enter X-rate
Negotiation objectives 62	Price calculations 5	Upload titlelist 6	Send reminders	Library invoices 3
Forecast prices 19		Request licenses	Place orders 51	Library credit notes 11
Send forecasts 269		Update licenses 1	Verify orders 10	Verify payments 272
				Invoice collection 277

Workflow Consortia Manager



- Amélioration du suivi des négociations : workflows et tableaux de bord

### ACM - ASSOCIATION FOR COMPUTING MACHINERY / TSP DIFFUSION 2019

RENEW 2019 EDIT META DATA BACK

Agreement period: 1 Jan 2019 — 31 Dec 2019  
 3 years agreement: 1 Jan 2017 - 31 Dec 2019  
 Contains products from: ACM - Association for computing machinery / TSP Diffusion

Managed by Jérôme Kalfon, Anne-Sophie Tagliavini and Catherine Fournier  
 Deadline for reply: 30 Sep 2019

Agreement overview 2019

3 New subscriptions accepted	12.669,74 EUR
22 Renewal subscriptions accepted	221.766,74 EUR
<b>Total agreement value</b>	<b>234.436,48 EUR</b>

Subscribers and pricing M EXPORT PRICE CALCULATIONS

View by: Subscriptions Members Products

Subscriptions (25) Pending renewals Cancelled renewals Price offers All

Type	Status	Member	Product	EUR
R	✓	Centre national de la ..	ACM Digital Library	88.409,65
R	✓	Conservatoire national..	ACM Digital Library	4.413,81
R	✓	Ecole nationale de l'a..	ACM Digital Library	4.413,81
R	✓	EM LYON Business School	ACM Digital Library	1.619,93
R	✓	IMT Atlantique Bretag..	ACM Digital Library	4.413,81
R	✓	Institut National de R..	ACM Digital Library	50.497,01
R	✓	Institut National des ..	ACM Digital Library	4.413,81

Agreement history M

Period	Value
2019 1 Jan 2019 - 31 Dec 2019	234.436 EUR More info
2018 1 Jan 2018 - 31 Dec 2018	230.863 EUR More info
2017 1 Jan 2017 - 31 Dec 2017	228.623 EUR More info
2016 1 Jan 2016 - 30 Dec 2016	226.639 EUR More info
2015 1 Jan 2015 - 31 Dec 2015	192.579 EUR More info
2014 1 Jan 2014 - 31 Dec 2014	165.115 EUR More info

Price per year (EUR)

Tableau de bord d'un accord

### ACM DIGITAL LIBRARY

EDIT BACK TO OVERVIEW

Standard product provided by ACM - Association for computing machinery / TSP Diffusion  
 Product category: Périodiques

1 Active agreements

Name	Period	Subscribers	Total
ACM - Association for computing mac ..	1 Jan - 31 Dec 2019	25 subscribers	234.436,48 EUR

Current spend

**234.436**  
EUR

Spend per year (EUR)

Notes

Jérôme Kalfon 06:04, 14 Jul 2014  
 Négociation tripartite Couperin / CNRS / INRIA, assistés de TSP Diffusion, mandaté par ACM en France.

25 Subscribers

Name	2017	2018	2019
Agence Nationale de Sécurité des ..	—	—	500,00 EUR
Centre national de la recherche sci ..	87.532,14 EUR	89.969,80 EUR	88.409,65 EUR
Conservatoire national des arts et ..	4.370,00 EUR	4.691,85 EUR	4.413,81 EUR
Ecole nationale de l'aviation civil ..	4.370,00 EUR	4.691,85 EUR	4.413,81 EUR
EM LYON Business School	1.603,85 EUR	3.611,87 EUR	1.619,93 EUR
IMT Atlantique Bretagne - Pays de ..	4.370,00 EUR	4.391,85 EUR	4.413,81 EUR
Institut National de Recherche en I ..	49.995,80 EUR	53.245,78 EUR	50.497,01 EUR

Subscribers per year

Related attachments

UPLOAD A FILE

Consortium files Member files

Tableau de bord d'une ressource



- Un outil de pilotage et d'aide à la décision : **simulateur tarifaire**, historique des négociations, exports configurables

**ACM - ASSOCIATION FOR COMPUTING MACHINERY / TSP DIFFUSION 2019**

All prices are shown in EUR. Auto renew is disabled

FINALIZE ALL PRODUCTS    BACK TO AGREEMENT

1 year agreement, starting 1 Jan 2019

Price rules    Fee and discount rules    Offer restriction rules

Price rule to apply

Select a price rule [\(Create new\)](#)

Summary

Apply to product

Apply to prices with

Apply to price column

Select a product

Subscription type

Subscription status

Price column

APPLY

All renewals **22 / 22**    ACM Digital Library **22 / 22**

Renewals with prices    22 / 22    221.766,74    TOGGLE COLUMNS

Sub. Status	Sub. Type	Name Product	Name Member	Order Option	Total FTE	Date Sub. start	Date Sub. end	Date Deadline	Price Last year	Price List	Price Forecasted	Price Sales	Price Change	Total Fees	Total Discounts	Price Finalized
Accepted	R	ACM Digital Library	Université Vincennes-Saint Denis (Paris ..	All	23.913	01/01/2019	31/12/2019	—	5.270,22	0,00	0,00	5.296,57	0,50%	0,00	0,00	✓
Accepted	R	ACM Digital Library	IMT Atlantique Bretagne - Pays de la Lo..	All	2.210	01/01/2019	31/12/2019	—	4.391,85	0,00	0,00	4.413,81	0,50%	0,00	0,00	✓
Accepted	R	ACM Digital Library	Université de La Réunion	All	14.424	01/01/2019	31/12/2019	—	3.740,19	0,00	0,00	3.658,39	-2,19%	0,00	0,00	✓
Accepted	R	ACM Digital Library	Institut National de Recherche en Inform..	All	620	01/01/2019	31/12/2019	—	53.245,78	0,00	53.587,44	50.497,01	-5,16%	0,00	0,00	✓
Accepted	R	ACM Digital Library	Université de Bretagne-Sud (UBS)	All	8.786	01/01/2019	31/12/2019	—	4.691,85	0,00	4.423,03	4.413,81	-5,93%	0,00	0,00	✓
Accepted	R	ACM Digital Library	Conservatoire national des arts et métie..	All	69.891	01/01/2019	31/12/2019	—	4.691,85	0,00	0,00	4.413,81	-5,93%	0,00	0,00	✓
Accepted	R	ACM Digital Library	Université d'Orléans	All	17.908	01/01/2019	31/12/2019	—	4.106,35	0,00	0,00	4.026,38	-1,95%	0,00	0,00	✓

Simulateur tarifaire



- Un outil de pilotage et d'aide à la décision : simulateur tarifaire, **historique des négociations**, exports configurables

Agreement history **M**

Period	Value
<b>2019</b> 1 Jan 2019 - 31 Dec 2019	<b>234,436 EUR</b> <a href="#">More info</a>
<b>2018</b> 1 Jan 2018 - 31 Dec 2018	<b>230,863 EUR</b> <a href="#">More info</a>
<b>2017</b> 1 Jan 2017 - 31 Dec 2017	<b>228,623 EUR</b> <a href="#">More info</a>
<b>2016</b> 1 Jan 2016 - 30 Dec 2016	<b>226,639 EUR</b> <a href="#">More info</a>
<b>2015</b> 1 Jan 2015 - 31 Dec 2015	<b>192,579 EUR</b> <a href="#">More info</a>
<b>2014</b> 1 Jan 2014 - 31 Dec 2014	<b>165,115 EUR</b> <a href="#">More info</a>

Historique des négociations

Exports configurables

## REPORT

Create a new report

**Choose Report Type**  
Subscriptions

**Title**  
Title

**Description**  
Description

Visible to member

**Columns**  
 Check/Uncheck All

**Basic information**

- Subscription ID
- Registered date & time
- Agreement Manager
- Product options
- Agent name
- Member name
- Member name (English)
- Status
- Publisher PO number
- Member PO number
- List price
- Forecasted price
- Currency
- Final price
- Final currency
- Fees
- Discounts
- VAT code
- IPv4 addresses
- IPv6 addresses
- FTE total (sub-period minus 2 years)

**Basic information**

- Agreement name
- Product name
- Publisher name
- Start date
- End date
- Price

>>
<<



- Intégration des **listes Kbart** et **statistiques Counter**

Title list

[ADD TITLE](#) [IMPORT TITLE LIST](#)

Name	Titles	Valid from	Valid to
No items found			

### UPLOAD A NEW TITLE LIST

ACM Digital Library [BACK TO PRODUCT](#)

**File to upload**  
 Aucun fichier choisi

**File format**  
 KBART format  Custom format

**Valid from**  **Valid to**

Column	Column
Publication title <input type="text" value="A"/>	Print identifier <input type="text" value="B"/>
Online identifier <input type="text" value="C"/>	Date first issue online <input type="text" value="D"/>
Num first vol online <input type="text" value="E"/>	Num first issue online <input type="text" value="F"/>
Date last issue online <input type="text" value="G"/>	Num last vol online <input type="text" value="H"/>
Num last issue online <input type="text" value="I"/>	Title url <input type="text" value="J"/>
First author <input type="text" value="K"/>	Title id <input type="text" value="L"/>
Embargo info <input type="text" value="M"/>	Coverage depth <input type="text" value="N"/>
Notes <input type="text" value="O"/>	Publisher name <input type="text" value="P"/>
Publication type <input type="text" value="Q"/>	Date monograph published print <input type="text" value="R"/>
Date monograph published online <input type="text" value="S"/>	Monograph volume <input type="text" value="T"/>
Monograph edition <input type="text" value="U"/>	First editor <input type="text" value="V"/>
Parent publication title id <input type="text" value="W"/>	Preceding publication title id <input type="text" value="X"/>
Access type <input type="text" value="Y"/>	

Unset default column order

[IMPORT TITLE LIST](#)

### ADD A TITLE TO THIS PRODUCT

[BACK TO PRODUCT](#)

**Publication title**

**Print identifier**  **E-identifier**

**Valid from**  **Valid to**

**KBART meta data**

<input type="text" value="date_first_issue_online"/>	<input type="text" value="num_first_vol_online"/>	<input type="text" value="num_first_issue_online"/>
<input type="text" value="date_last_issue_online"/>	<input type="text" value="num_last_vol_online"/>	<input type="text" value="num_last_issue_online"/>

**title url**

**first\_author**  **title\_id**

**embargo\_info**  **coverage\_depth**

**notes**

**publisher\_name**  **publication\_type**

**date\_monograph\_published\_print**  **date\_monograph\_published\_online**

**monograph\_volume**  **monograph\_edition**

**first\_editor**

**parent\_publication\_title\_id**  **preceding\_publication\_title\_id**

**access\_type**

[SAVE TITLE](#)

- Amélioration du **suivi financier** des adhésions



## 4/ CoMan pour les membres

Un **ERMS** avec un tableau de bord pour :

- Visualiser l'**historique des abonnements et coûts annuels**
- Déclarer les **coûts d'abonnement**
- **Mettre à jour les informations** (contacts, FTE, IP, etc.)
- Joindre des **fichiers** et des **notes** (licences signées, factures, courriers, etc.)
- Avoir en regard les **statistiques d'usages** et les coûts d'abonnement



- Visualisation de l'historique des abonnements et coûts

Consortia Manager DASHBOARD CATALOGUE SUBSCRIPTIONS MORE Quick search PROFILE

**COUPERIN** CONSORTIUM COUPERIN

**UNIVERSITÉ TEST**  
Alexei Rodionov

Renewals	(EUR) 2018	(EUR) 2019
Renewals accepted	590.805	532.197
New agreements accepted	22.184	25.034
Subtotal	N/A	557.232
Pending renewals	-	26.292
Unpublished renewals	-	84.953
Total / Estimated spend	N/A	668.477
Cancellations	35.085	2.755

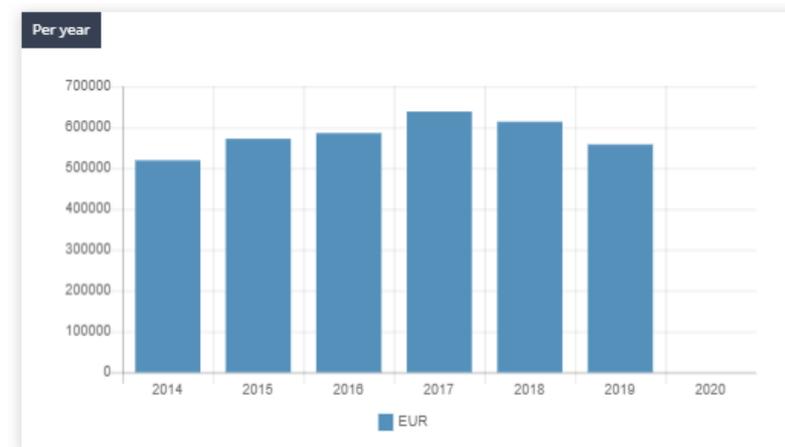
**3 Renewals**  
OPEN RENEWALS

Latest emails from the system

- Subscription order confirmation  
Sent: 10:22, 6 Jun 2019 — Jérôme Kalfon  
Recipients: betty.lecorre@univ-angers.fr (+ 5)
- Invoice export file  
Sent: 11:59, 14 May 2019 — Vincent Harnais  
Recipients: betty.lecorre@univ-angers.fr (+ 5)
- Invoice export file

<b>Pending renewals</b> 26,292 EUR	<b>Accepted subscriptions</b> 557.232 EUR	<b>Cancelled subscriptions</b> 2.755 EUR
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VIEW PENDING RENEWALS



Offer	2017		2018		2019	
	Original	Local	Original	Local	Original	Local
AACR	EUR 1.200	EUR 1.200	-	-	EUR 1.300	EUR 1.300
ACM - Association for computing machinery / TSP Diffusion	-	-	-	-	EUR 500	EUR 500
American Chemical Society	EUR 26.930	EUR 26.930	EUR 27.500	EUR 27.500	EUR 28.300	EUR 28.300
American Institute of Physics (AIP)	EUR 16.846	EUR 16.846	EUR 17.300	EUR 17.300	EUR 18.000	EUR 18.000
American mathematical society (AMS)	EUR 11.629	EUR 11.629	EUR 12.386	EUR 12.386	EUR 14.279	EUR 14.279



- Mise à jour des informations, ajout de fichiers (1)

## UNIVERSITÉ TEST (UTE)

23 Subscriptions · 23.730 Total FTE  
Registered on 14 Jul 2014 as a library for Consortium Couperin

EDIT LIBRARY

**A : Universités et établissements assimilés**  
Managed by Jérôme Kalfon

Contact accounts ADD CONTACTS

Active contacts

Inactive contacts

Name	Type	Contact info
Alexei Rodionov <span style="font-size: 0.8em; color: #0070c0;">✎</span> <small>Correspondant Open Access, Administrator</small>	<span style="font-size: 0.8em;">👤</span>	<a href="mailto:alexei.rodionov@univ-test.fr">alexei.rodionov@univ-test.fr</a> <small>01 42 68 80 14</small>
Betty Lemole <span style="font-size: 0.8em; color: #0070c0;">✎</span> <small>Correspondant ressources..., Administrator</small>	<span style="font-size: 0.8em;">👤</span>	<a href="mailto:betty.lamole@univ-test.fr">betty.lamole@univ-test.fr</a> <small>02 48 66 80 12</small>
Celine Bemonde <span style="font-size: 0.8em; color: #0070c0;">✎</span> <small>Correspondant ressources..., Administrator</small>	<span style="font-size: 0.8em;">👤</span>	<a href="mailto:cecile.bemonde@univ-test.fr">cecile.bemonde@univ-test.fr</a> <small>03 43 67 80 71</small>
Lucas Rodeore <span style="font-size: 0.8em; color: #0070c0;">✎</span> <small>Président / Directeur, Administrator</small>	<span style="font-size: 0.8em;">👤</span>	<a href="mailto:president@univ-test.fr">president@univ-test.fr</a> <small>No phone number</small>
Nathalie Lalboral <span style="font-size: 0.8em; color: #0070c0;">✎</span> <small>Responsable de la docume..., Administrator</small>	<span style="font-size: 0.8em;">👤</span>	<a href="mailto:nathalie.lalboral@univ-test.fr">nathalie.lalboral@univ-test.fr</a> <small>05 46 78 25 26</small>

FTE information EDIT

\* = not included in total

	Total FTE	STUDENTS	STUDENTS (L) *	STUDENTS (M) *	STUDENTS (D) *	RESEARCHERS
2019	23.730	23.102	14.840	7.742	520	0
2018	23.527	22.935	14.670	7.750	515	0
2017	23.596	22.887	14.667	7.711	509	0
2016	23.298	22.573	14.186	7.883	504	0
2015	22.587	21.875	13.653	7.702	520	0
2014	21.918	21.220	13.164	7.542	514	0
2013	0	0	0	0	0	0
2012	0	0	0	0	0	0
2011	0	0	0	0	0	0
2010	0	0	0	0	0	0

Basic information

<b>Université Test</b>	UTE
Active account	
No website found	
No phone number found	
No email found	
Invoicing payment terms — 30 days	

Additional information META DATA

Private/Public	Public
Carnegie classification	0   (Not classified)
Debitor number	0491677G
Invoicing date preference	No preference



- Mise à jour des informations, ajout de fichiers (2)

### CREATE IP ADDRESS

[GO TO MEMBER](#) [BACK](#)

Use the form below to add an IP address — Université Test

**IP address version**  
IPv4

**IP address type**  
Range  
Single  
Range

**IP address (1) (2)**

192 · 168 · 1 · 0  
192 · 168 · 1 · 255

**Location**  
Location

**Description**  
Description

Do not send update to publisher

[SAVE IP ADDRESS](#)

### Related attachments

[UPLOAD A FILE](#)

Consortium files 0 Member files 0

No files found  
No files have been uploaded in this category

**Notes**

Add a note [ADD](#)



- Accéder en un clic aux renseignements propres à son abonnement

## AMERICAN ASSOCIATION FOR CANCER RESEARCH (AACR) - REVUES BACK TO OVERVIEW

Active subscription for **Université Test** 1 Jan 2019 to 31 Dec 2019  
Subscription provided by AACR Available in the AACR 2019 agreement

**Pricing information**

This is based on FTE model

Last updated by Thomas Violex on 13 Mar 2019

**American Association for Cancer .. 2019**  
12 months, starting 1 Jan 2019 More info

**American Association for Cancer .. 2017**  
12 months, starting 1 Jan 2017 More info

**License information**

**General**

License name: AACR License 2017-2019  
 License period: 1 Jan 2017 - 31 Dec 2019  
 License manager: System

**License summary**

The following summary is provided for informational purposes only. Please **always** refer to the exact terms in the license agreement

**License comment**

This is the main contract with AACR

**License terms**

<p><input checked="" type="checkbox"/> <b>Accès distant</b></p> <p><input checked="" type="checkbox"/> <b>Drop out clause</b> <small>But only for financial reasons. See section 8..</small></p> <p><input checked="" type="checkbox"/> <b>OA Policy</b> <small>Green</small></p>	<p><input checked="" type="checkbox"/> <b>Accès distant</b> <small>Yes, but only in France</small></p> <p><input checked="" type="checkbox"/> <b>Langue de la licence</b> <small>en attente</small></p> <p><input type="checkbox"/> <b>PEB</b></p>
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**License files & links**

[Main contract](#)

**Additional comments & notes**

Add a note ADD

**Related attachments** UPLOAD A FILE

Member files 0 Consortium files 1

? No files found  
No files have been uploaded in this category

**Title list**

Name	Titles	Valid from	Valid to	Export
2012 title list	3179	2012-01-01	2099-12-31	Export
2019 title list	1	2019-01-01	2019-12-31	Export

**Latest actions**

SHOW LATEST

**VAT code**

Subscription VAT code [N/A](#)

**Product details**

<b>Product type</b>	Standard
<b>Usage stats</b>	Yes
<b>Title list</b>	Yes

**Publisher information**

Name: AACR

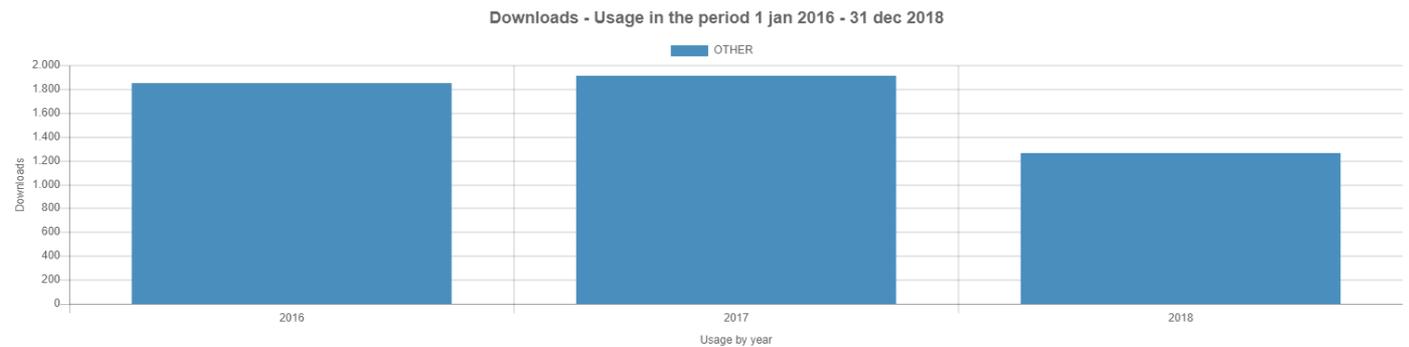
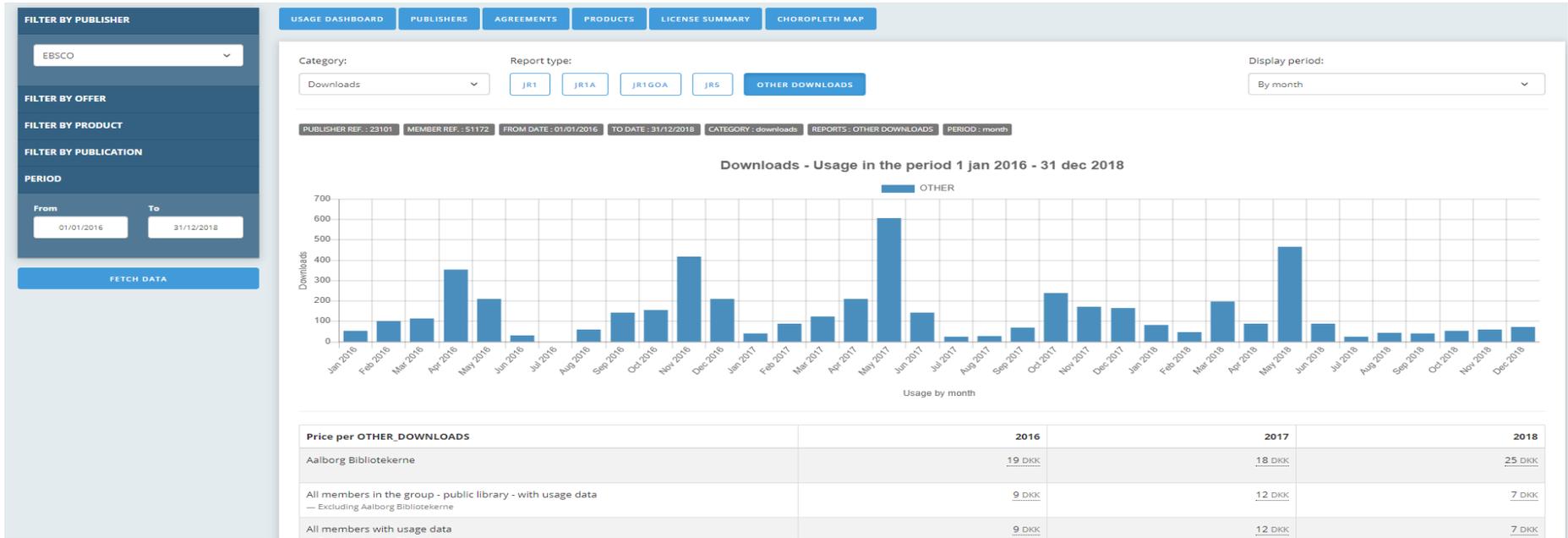
France

Contact name: John Thomas  
 Job title: Sales rep.  
 Email: [thomas@aacr.net](mailto:thomas@aacr.net)

Contact name: Peter Jones  
 Email: [jones@aacr.net](mailto:jones@aacr.net)



- Visualisation des statistiques d'usages en regard des coûts d'abonnement (1)



- Visualisation des statistiques d'usages en regard des coûts d'abonnement (2)

Consortia Manager DASHBOARD CATALOGUE SUBSCRIPTIONS MORE Quick search PROFILE

USAGE DASHBOARD PUBLISHERS AGREEMENTS PRODUCTS LICENSE SUMMARY CHOROPLETH MAP

Statistics for all offers – 2018

Usage statistics for all offers with usage data. All prices are displayed in DKK

TOGGLE COLUMNS 2018

Agreements	Subscriptions	DKK Total	2018 Inhabitants	DKK Price per FTE	Total Downloads	DKK Per Downloads
All	All	All	All	All	All	All
Oxford Art Online	1	5.853	213.271	0,03	21	278,72
Clio-portalerne	1	41.930	213.271	0,20	354	118,45
TurTeori	1	9.021	213.271	0,04	79	114,19
Oxford Music Online	1	6.647	213.271	0,03	77	86,32
Mango Languages	1	35.229	213.271	0,17	421	83,68
Ebook Central Academic Complete	1	86.024	213.271	0,40	1.319	65,22
Comics Plus	1	14.077	213.271	0,07	283	49,74
Europa World Plus	1	10.720	213.271	0,05	334	32,10
InfoMedia	1	167.430	213.271	0,79	5.228	32,03
Medici.tv	1	11.554	213.271	0,05	379	30,48



## 5/ Ce qu'implique l'adoption de CoMan

### **Pour le staff Couperin.org :**

- Un important chantier de nettoyage des données + la création de nombreux champs propres à Couperin
- La mise en place d'une campagne de formation à destination des futurs utilisateurs : négociateurs + membres

### **Pour les membres :**

- Une implication forte des membres incluant un suivi rigoureux de leurs données



# Merci de votre attention



Pour toute information complémentaire :

<https://www.consortiamanager.com/>



Pour nous contacter :

[vincent.harnais@couperin.org](mailto:vincent.harnais@couperin.org)

[valerie.larroque@couperin.org](mailto:valerie.larroque@couperin.org)

[anne-sophie.tagliavini@couperin.org](mailto:anne-sophie.tagliavini@couperin.org)

