



ESTABLISHING AN INGENTACONNECT DEPOSIT ACCOUNT

ANSWERS TO FREQUENTLY ASKED QUESTIONS REGARDING
SERVICE, SET-UP AND MAINTENANCE.

GENERAL QUESTIONS:

WHERE TO BEGIN? WHO CAN ESTABLISH A DEPOSIT ACCOUNT WITH INGENTACONNECT?

Begin by creating an institutional account online at www.ingentaconnect.com. **An institutional account must be established before a deposit account is created, as they are directly linked.** Registration can be completed entirely online, and institutions are encouraged to match their online subscriptions with those available via the IngentaConnect content database. This simple process gives users free full-text access to institutional/company subscriptions at any time, via IngentaConnect.

To register with IngentaConnect, go to www.ingentaconnect.com, click on the “Sign Up Here” button on the right-side of the home page, and select “Institutional Registration.” The registration process includes the following components:

- 1) Completing a simple registration form (institution’s address, method of patron authentication and preferred delivery methods and/or numbers and locations for delivery)
- 2) Designating a specific “site administrator” and completing their contact details
- 3) Registering subscriptions
- 4) Designating method of payment for document deliveries not included within your subscribed-to journals

*The institutional account registration process, as well as the process for setting up an account is explained in greater detail later in this document.

WHAT IS AN INGENTACONNECT DEPOSIT ACCOUNT?

A pre-paid account for an IngentaConnect-registered institution or company, a deposit account allows authorized patrons/employees to purchase against a specified amount of money, established by the library, for the receipt of IngentaConnect articles and products. IngentaConnect’s multi-disciplinary, online database includes more than 28,000 publications and 6,000 full-text electronic journals. Documents are delivered electronically through subscription or pay-per-view and if not available in electronic format, on paper, via fax and/or Ariel.

ARE THERE DIFFERENT TYPES OF INGENTACONNECT DEPOSIT ACCOUNTS?

Yes, IngentaConnect offers two types of deposit accounts – **standard and advanced**. Both types of deposit accounts are accessible via the Web, from any computer, at any time. There are significant differences in features and functionality between a standard and an advanced deposit account.

A **standard deposit account** enables an institution to fund an account and will allow authenticated patrons to purchase articles against that account. Administrators may also view the standard deposit account activity online using a specified username and password.

An **advanced deposit account** provides library administrators with the greatest amount of account control and organizational tools to track patron spending. An advanced deposit account includes all of the features of a standard account, in addition to the following functionality:

- **Master and Sub-Accounts:** Allow funds to be deposited into a single account and to “trickle down” to multiple sub-accounts.

- **Single Item Cost Caps:** Designate the maximum amount, per single article, that your institution is willing to fund.
- **Time Period Spending Limit:** Select a time period in which a group of authenticated users will be allowed to purchase articles online using your library-funded deposit account.
- **Number of Items Cap:** Limit the number of articles purchased by a patron at any one time.
- **Cost Centers:** Link users to a particular cost center (e.g. project, status, major or academic department).
- **Monthly User Reports:** Receive by email, direct from our library customer service team, a detailed monthly report of all article expenditures.

WHAT DOES A DEPOSIT ACCOUNT ALLOW AN INSTITUTION AND ITS USERS TO DO?

Allows users to purchase articles on IngentaConnect not subscribed to by an institution, using specific funds. The initial institutional registration also allows users to access full-text subscriptions for free and set limits on spending as set up by a designated, centralized site administrator. With an advanced deposit account, administrators have the greatest amount of control over patron spending and organization of funds. In addition, all registered users of IngentaConnect may freely view the table of contents and citations for most articles available on IngentaConnect (not subscribed to by an institution).

WHAT ARE SOME OF THE BENEFITS OF HAVING A DEPOSIT ACCOUNT WITH INGENTACONNECT?

A deposit account gives institutional and corporate administrators the opportunity to establish an easy alternative service that enables their patrons to obtain articles (via pay-per-view, fax or Ariel) not included within an organisation's existing subscriptions using a library fund. Libraries can potentially save on overall document delivery and subscription costs, as they pay for patron research on an on-demand basis.

A standard deposit account allows authenticated users (via IP authentication or a library-specified user name and password) to purchase the research they need, but don't have a subscription to, on demand. In addition, the institution's designated deposit account administrator can view their account balance, document orders and other activity online at any time.

An advanced deposit account gives the library administrator the greatest amount of control and management capability. Administrators can easily cap, track, and monitor an institution's online article purchasing activity for any patron, from any computer.

ARE THERE ANY GENERAL REQUIREMENTS ASSOCIATED WITH MAINTAINING A DEPOSIT ACCOUNT?

Any registered organisation (institution/company) can create and fund a deposit account with IngentaConnect. IngentaConnect simply requires that the organisation designate a site administrator who will complete the registration process at www.ingentaconnect.com and ensure that the account is properly funded, with a minimum initial deposit of \$500.00 for a standard deposit account, and a minimum initial deposit of \$1,000.00 for an advanced deposit account. We also require the customer to provide the appropriate accounting and/or administrative contacts to open and oversee its funding and maintenance.

IS AN INSTITUTION LIMITED TO ONE DEPOSIT ACCOUNT?

No, an institution can establish more than one deposit account, and any combination of standard and/or advanced deposit accounts to help segment, track and control departmental spending, provided that each account meets the necessary requirements as stated in this document.

WHAT ARE THE PAYMENT ALTERNATIVES TO A DEPOSIT ACCOUNT?

Alternative payment methods include a billing account, also established by an institution, which allows patrons and users to purchase against a credit card account, automatically debited by IngentaConnect each month. There is a \$15.00 monthly maintenance fee associated with a billing account for months where there is purchasing activity. NOTE: There are no funding limits that can be set with a billing account; therefore patron spending can be more difficult to control.

Additionally, individuals who are not associated with an institutional account can purchase articles on their own credit or debit cards, but must also go through the personal registration process in order to set up an account and purchase content.

QUESTIONS REGARDING CHARGES AND BALANCES:

IS THERE A MINIMUM REQUIRED TO OPEN AN ACCOUNT? MUST I MAINTAIN A BALANCE?

There is a minimum of \$500.00 required to open a standard deposit account with IngentaConnect, as well as an annual maintenance fee of \$100.00. Please note that an institution may elect to deduct the \$100.00 maintenance fee from their minimum \$500.00 deposit.

There is a minimum of \$1,000.00 required to open an advanced deposit account, with an annual maintenance fee of \$250.00. Please note that an institution may elect to deduct the \$250.00 from their minimum \$1,000.00 deposit.

IngentaConnect does not require that a minimum balance be maintained after the account has been opened, however, accounts that are inactive for a 12-month period will be subject to a fee. Please see section below for further details.

WHAT OTHER CHARGES ARE ASSOCIATED WITH A DEPOSIT ACCOUNT?

There are no penalty charges associated with falling below a minimum balance, and there are no restrictions as to minimum levels of account purchasing activity month to month associated with an account*, with the exception of the respective \$100.00 and \$250.00 flat, annual maintenance fees as stated above.

Annual charges for all deposit accounts are due prior to 30th September each year.

*IngentaConnect reserves the right to impose account audit and review charges on accounts which show no document purchasing activity for a 12 month period. These fees will normally be calculated as the greater of \$100.00 or 10% of the then current balance.

DOES INGENTACONNECT OFFER VOLUME DISCOUNTS?

IngentaConnect offers volume discounts on electronic article delivery costs on a per article basis. Volume discounts are offered to Institutions depositing more than \$5,000 per annum. If you would like to discuss implementing a volume discount for your deposit account, please contact libraryinfo@ingenta.com

DOES INGENTACONNECT OFFER REPORTING SERVICES ON DEPOSIT ACCOUNTS?

IngentaConnect offers an Account Audit and Reporting (AAR) service at a cost of \$100.00. Our accounting team can provide this service upon request at any time. **Please note that this is a mandatory service and \$100.00 charge for those wishing to close an account.**

The AAR service provides a certified report containing:

- A statement of all account transactions for the last 2 years
- A statement of all purchases
- A statement of copyright compliance and royalty payment

REGISTRATION, SET-UP AND ACTIVATION OF ACCOUNT:

HOW DO I REGISTER TO SET UP A DEPOSIT ACCOUNT?

Setting up a deposit account, either standard or advanced is easy and can be completed entirely online, at any time, via www.ingentaconnect.com. *Before registering please check whether your institution has already been registered by contacting help@ingentaconnect.com

1) To get started, go to www.ingentaconnect.com. On the right-hand side of the page, click on 'Sign up here'

The image consists of two screenshots of the IngentaConnect website. The top screenshot shows the homepage with the text 'Welcome to IngentaConnect' and 'The most comprehensive collection of academic and professional publications'. On the right side, there is a 'Sign in' section with fields for 'User name' and 'Password', and a 'Need to register? Sign up here' link. An arrow points from a text box to this link. The bottom screenshot shows the 'Personal Registration' page with a form for registration. A text box on the right contains instructions for institutional registration, and an arrow points from it to the 'Institutional Registration' link in the top right corner of the page.

1) Click here to begin the registration process

2) Click on *Institutional Registration* and complete the four steps outlined on this page.

Complete the institutional registration form: a page containing contact and general administrative details for the institution.

IngestaConnect Institutional Registration: Authentication - Microsoft Internet Explorer

Address: https://www.ingentaconnect.com/register/institutional

Browse Publications | Advanced Search | Search History | Marked List

Institutional Registration

Step 2: Authentication

Access to IngestaConnect can be set up by IP address or by user name and password. You may choose to use one or both of these authentication methods.

IP address/range

Any user who accesses IngestaConnect from an IP address or from within the IP range you define will be granted access to your institution's subscriptions.

IP address/range:

(for more than one IP address or range, insert a semicolon between each)
your current IP address is 192.168.5.11

AND/OR

User name and password

You may wish to distribute a user name and password to your users for access outside of your IP range.

Both user name and password must have a minimum of 5 characters.

User name:

Password:

Retype password:

Cancel Back Next

THIS PAGE IS SECURE

Quick Search

Electronic content
 Fax/Ariel content
 Journal or book title

GO

Sign in:

User name:
Password:

Remember me

GO

Forgotten your password?
Sign in via Athens

Text size:

Important:
Institutions must indicate how they would like to authenticate their users – either by IP Address or by User Name and Password, which they'll select and give to users.

IngestaConnect Institutional Registration: Article Delivery - Microsoft Internet Explorer

Address: https://www.ingentaconnect.com/register/institutional

Browse Publications | Advanced Search | Search History | Marked List

Institutional Registration

Step 3: Article Delivery

If electronic delivery of the article you require is not available, users can select fax or Ariel delivery. Please indicate which delivery method would be your preferred option, and the default fax and/or Ariel number we should deliver to:

Preferred delivery method:

Fax
 Ariel

Default fax number:

Default Ariel address:

Default coversheet information:

Cancel Back Next

THIS PAGE IS SECURE

Quick Search

Electronic content
 Fax/Ariel content
 Journal or book title

GO

Sign in:

User name:
Password:

Remember me

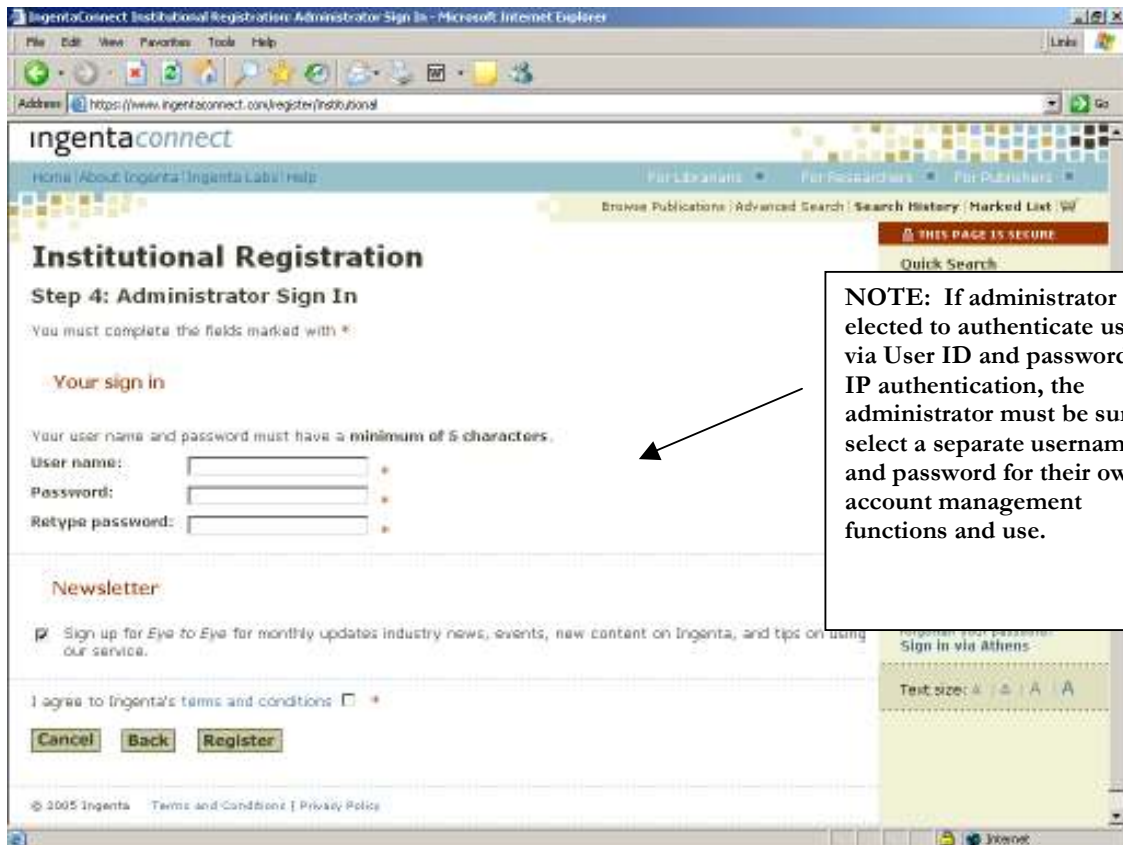
GO

Forgotten your password?
Sign in via Athens

Text size:

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Important:
Whether or not Institutions will be ordering documents from our Fax/Ariel database, administrators must indicate whether they prefer Fax or Ariel delivery



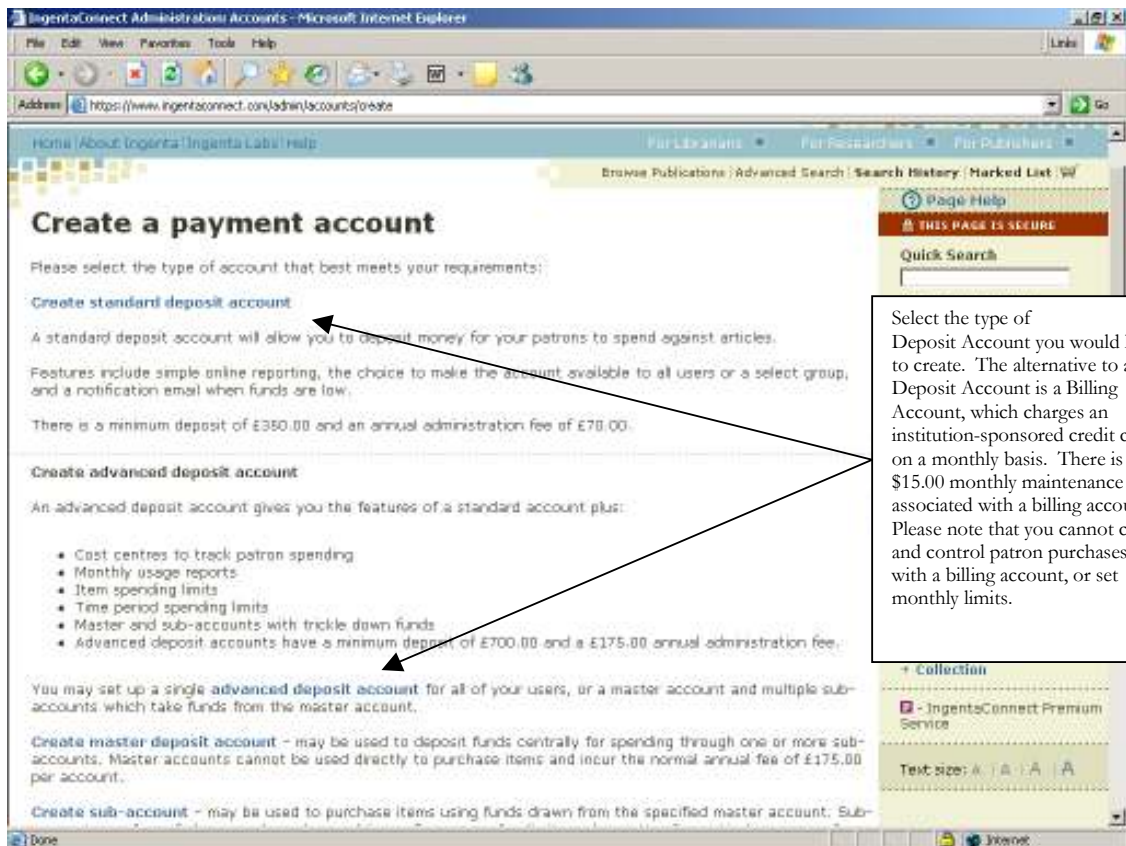
Upon completion of the site administrator form, the registrant may either...

- c) Register/match their subscriptions



OR

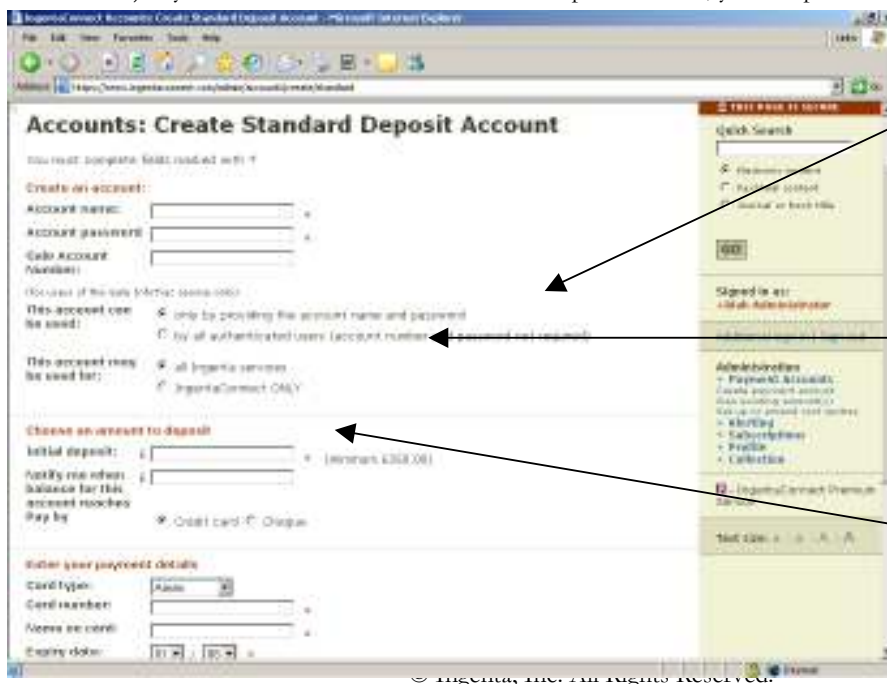
d) Create a payment account. Clicking on a create a payment account will take the registrant to the *create account* screen shown here:



Select the type of Deposit Account you would like to create. The alternative to a Deposit Account is a Billing Account, which charges an institution-sponsored credit card on a monthly basis. There is a \$15.00 monthly maintenance fee associated with a billing account. Please note that you cannot cap and control patron purchases with a billing account, or set monthly limits.

1) Click through to either *create a standard deposit account* or *create an advanced deposit account*.

a) If you have elected to create a standard deposit account, you will proceed to the screen below:



2) Indicate the method of verification for your users.

3) You may also designate if you'd like the account used for purchases only in IngentaConnect, or across all of our sites, including IngentaConnect., Gale partnership sites, publisher websites and our Customized Library Gateways.

4) Indicate the amount that you would like to deposit. REMEMBER: \$500.00 is the required minimum. Also, let us know at what amount you would like to be notified of low funds. You may fund your account by check or credit card. If you have selected credit card, please fill out the remainder of the form with the required credit card information.

b) If you have elected to create an advanced deposit account, you will proceed to the screen below:

Accounts: Create Advanced Deposit Account

You must complete fields marked with *

Create an account:

Account name: *

Account password: *

Gale Account Number:

(For users of the Gale InfoTrac service only)

This account can be used:

only by providing the account name and password

by all authenticated users (account number and password not required)

This account may be used for:

all Ingenta services

IngentaConnect ONLY

Spending limit

Max. price: £ (per single item)

Max. number of items:

Max. spend per user: £

Every Starting in

Choose an amount to deposit

Initial deposit: £ * (minimum: £700.00)

Notify me when balance for this: £

1) As with a standard account, you need to indicate how you'd like to authenticate users, and if you'd like the account to be usable only on IngentaConnect or all of Ingenta's sites, as above.

2) Indicate if you'd like to cap the cost of each article purchase, or the total amount spent in a period of time. Also, you may limit the number of items each patron may purchase.

3) Be sure to tell us your initial deposit amount (\$1,000 minimum), as well as the amount at which you'd like to be notified of low funds. If you are paying by credit card, complete the remainder of the form.

HOW LONG DOES IT TAKE TO ACTIVATE A NEW DEPOSIT ACCOUNT?

Upon creating an institutional account and setting up a deposit account, an email is delivered immediately to the accounting department at IngentaConnect to begin the activation process.

1) If the institution has requested to open an account with a check deposit: IngentaConnect will send an invoice upon registration and will immediately activate the account with a temporary overdraft of 10% of the requested amount to allow the institution to begin using the account. This process takes 24-48 hours.

2) If the institution has requested to set up an account by credit card: a charge is applied and the account is activated within 24-48 hours. The customer will be notified immediately upon charge and activation.

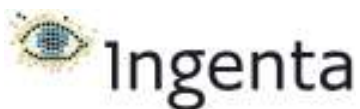
HOW DO I REPLENISH A DEPOSIT ACCOUNT? CAN I ARRANGE FOR ADVANCE NOTICE OF LOW FUNDS?

Deposit Accounts may be replenished through IngentaConnect's accounting department through a simple, replenishment request form (see Attachment 1). Institutions complete the required information and fax or email it directly to IngentaConnect's accounting team, who will then work with the client to insure that the funds have been replenished. To request a replenishment form, simply email IngentaConnect's Finance Department at libraryfinance@ingenta.com.

At the time of account set-up, institutions may request that an automatic, low-balance email notice be sent to them when funds need to be replenished. You can request the specific amount at which you would like to be notified. You may also contact libraryinfo@ingenta.com at any time to request notification or a change in the notification amount. See Attachment 2 for a sample notice.

Questions? Concerns? Suggestions?

For all deposit account inquiries, please contact libraryinfo@ingenta.com



Attachment 1:

IngentaConnect Deposit Replenishment Form

Date of Request: ____/____/____ To: **Finance Department**

Institution Name: _____

Contact Name: _____ Tel Number: _____

Email Address: _____ IngentaConnect Deposit Account Number: _____

Amount to be deposited (*U.S. Dollars only*): \$ _____

Please select Method of Payment

Credit Card Check

Credit Card Type: _____ Card Number: _____

Expiration Date (MM/YY): ____/____ Cardholders Name: _____

Credit Card billing address: _____

City, State & Zip code: _____

Country: _____

Invoicing Information

Contact Name: _____ Tel. No: _____

Billing Address: _____

City, State & zip code: _____

Special Instructions: _____

Please return this form via fax to the following number: Fax: **+1 401 331 2015**
Or email to the following address: Email: **libraryfinance@ingenta.com**

Please send check payments to the following address:

**Finance Department
Ingenta Inc
111R Chestnut Street
Providence, RI 02903
USA**

Terms and Conditions as per the Deposit Account FAQ on Ingenta.com and as updated from time to time.

For internal Use Only:

Date of Invoice: _____ Invoice # _____

C/C Charge Date: Authorization # _____

Provisional Credit in ISIS \$ _____ Date _____ Approved _____

Payment Received _____ Check # _____

Date Pmt entered in ISIS _____

Attachment 2: Sample Automatic Low-Balance Notice (delivered via email)

Subject: Ingenta payment account - low balance notification

Dear Library Customer,

We would like to inform you that the balance of your institution-sponsored, deposit account has now reached the following amount:

Current balance: \$249.00
Notification threshold: \$250

Payment Account: 1234
Account Administrator: xxxx

Please replenish your account immediately to avoid interruptions to this service.

To replenish your account, simply complete the form available at https://www.ingentaconnect.com/docs/deposit_replen.pdf

You may replenish your account to any amount exceeding \$100.

If you would like to hear about the article discounts we could offer your institution on account replenishment, or if you would like to specify a different amount as your notification threshold for future notices, please contact librarysupport@ingenta.com

You may also request not to receive future notice of low balances, however, please note that your deposit account service may be interrupted when the account reaches zero.
