

AFO 279 – Subscription renewal

279.1 Introduction

Subscription orders for serials can be renewed individually by Acquisitions staff or automatically by a processing job.

The system can calculate the new renewal price based on a supplied inflation rate change.

The **processing jobs** involved are :

- Subscription review report
- Subscription renewal

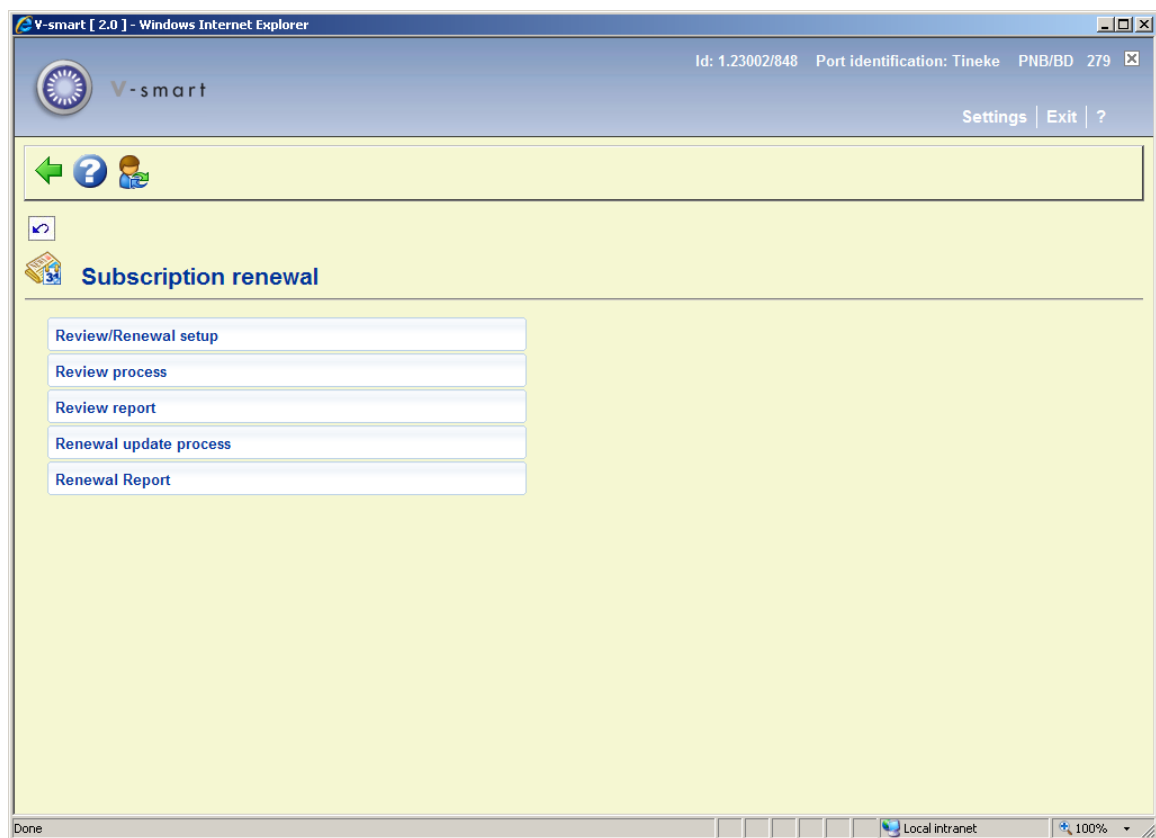
Activities should be carried out in the following sequence:

1. execute the Subscription Review Job to see which orders are due for renewal and which budgets they are to be encumbered from
2. Acquisitions staff could update orders to change their budget allocation, copy locations, supplier, and so on
3. execute the Subscription Review Job again to verify any budget allocation changes made, and to see the total amounts that will be encumbered from each budget
4. Acquisitions staff should ensure that these budgets contain enough money for the renewals
5. Acquisitions staff can manually RENEW any orders that they do **not** want handled automatically by the Subscription Renewal Job
6. OR, execute the Subscription Renewal Job to automatically renew the orders based on current or predicted unit cost
7. to check the results, Acquisitions staff can produce the Renewal Report

The system selects subscriptions to review or renew based on the following criteria:

- The subscription has a valid link to a purchase order at detail level.
- The subscription is active.
- The subscription has the “Generate renewal” flag on.
- The subscription Review date is between the start and end dates defined under Setup.

After selecting this AFO a menu will be displayed:



The options are explained in the next sections.

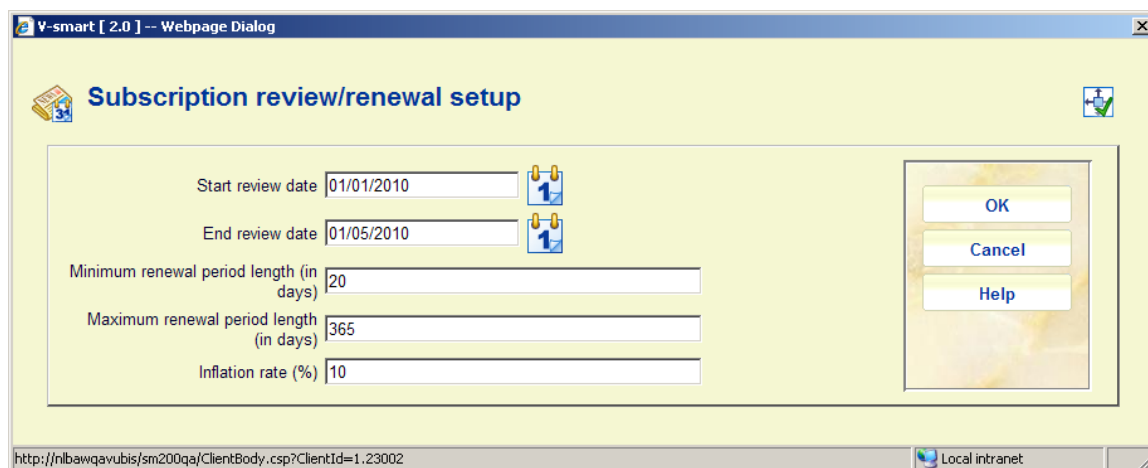
279.2 Setup

The setup of the jobs determines which orders are selected for review or renewal, sets bounds on the length of the renewal period and provides cost adjustment.

The renewal job selects orders whose subscription review date is within the range specified by the Start and Ending review date parameters.

The library might execute the subscription jobs quarterly or annually, or whenever renewals are required. It is assumed that when the subscription renewal is done that the passed subscription period is complete and no more commitment will remain for the period. If there is an outstanding commitment, it will be adjusted based on recalculation/inflation rate.

After selecting this option an input form will be displayed:



The screenshot shows a web browser window titled "V-smart [2.0] -- Webpage Dialog". The main content area is titled "Subscription review/renewal setup" and contains the following fields and buttons:

- Start review date: 01/01/2010
- End review date: 01/05/2010
- Minimum renewal period length (in days): 20
- Maximum renewal period length (in days): 365
- Inflation rate (%): 10
- Buttons: OK, Cancel, Help

The browser's address bar shows the URL: <http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23002> and the status bar shows "Local intranet".

Fields on the form

Start review date: Select a start date for the review period.

End review date: Select an end date for the review period.

Minimum renewal period length (in days): Enter the minimum renewal period. Any subscription with a number of days in field **Renewal period** that is less than the number defined here will not appear in the report.

Maximum renewal period length (in days): Enter the maximum renewal period. Any subscription with a number of days in field **Renewal period** that is greater than the number defined here will not appear in the report.

Note

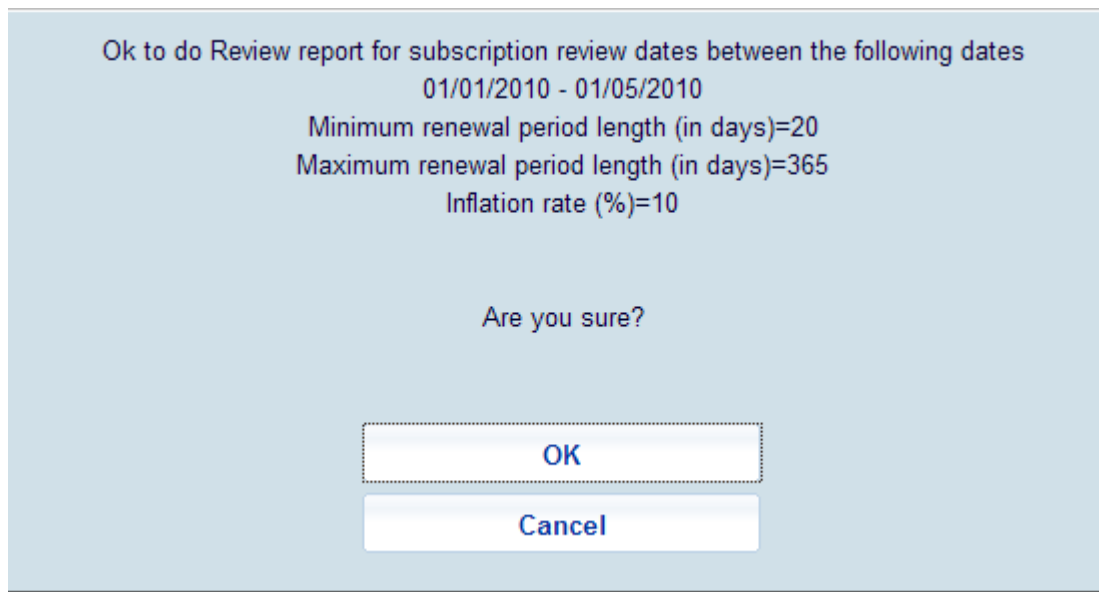
When no period is defined for a subscription but it does have a review date, the subscription will appear in the report.

Inflation rate: Enter an inflation rate, this can be positive or negative. The price of the subscription (as derived from the original order) will be adjusted according to this rate in the report.

279.3 Review process

Use this option to generate the review report. This job selects order records that meet the conditions described above. This job does not affect the database.

A message will be displayed that the report will run on the parameters from the Setup section:



When you click **OK**, the system will switch to the standard screen for scheduling processes.

279.4 Review report

With this option you can view the results of the reporting. After selecting this option an overview screen will be displayed:

V-smart [2.0] - Windows Internet Explorer

Id: 1.23002/5252 Port identification: Tineke PNB/BD 279

V-smart Settings | Exit | ?

Subscription review report

No	Date/time	Run by
<input type="checkbox"/>	1 20 May 2010 02:03:52PM	Tineke
<input type="checkbox"/>	2 11 May 2010 01:57:36PM	Tineke
<input type="checkbox"/>	3 11 May 2010 01:44:52PM	Tineke
<input type="checkbox"/>	4 06 May 2010 03:59:26PM	Tineke
<input type="checkbox"/>	5 05 May 2010 07:23:25PM	Deb MacLeod@VS35QA
<input type="checkbox"/>	6 05 May 2010 07:18:25PM	Deb MacLeod@VS35QA
<input type="checkbox"/>	7 05 May 2010 07:01:36PM	Deb MacLeod@VS35QA
<input type="checkbox"/>	8 05 May 2010 07:00:39PM	Deb MacLeod@VS35QA
<input type="checkbox"/>	9 05 May 2010 06:37:52PM	Deb MacLeod@VS35QA
<input type="checkbox"/>	10 05 May 2010 04:23:59PM	Tineke
<input type="checkbox"/>	11 05 May 2010 04:19:15PM	Tineke
<input type="checkbox"/>	12 05 May 2010 01:18:07PM	DEBVSQA
<input type="checkbox"/>	13 05 May 2010 01:12:23PM	Super User (vgg)
<input type="checkbox"/>	14 05 May 2010 01:12:05PM	DEBVSQA
<input type="checkbox"/>	15 11 May 2010 03:47:40PM	Tineke
<input type="checkbox"/>	16 06 May 2010 04:10:10PM	Tineke
<input type="checkbox"/>	17 05 May 2010 12:48:10PM	Deb MacLeod@VS35QA

Done Local intranet 100%

Options on the screen

Delete report: Select a line and then this option to delete the report from the list. The system will prompt for confirmation.

Print report: Select a line and then this option to print the report. The system will switch to the standard screen for generating output.

The report lists the orders in a sequence based on:

1) library

2) budget

3) title.

4) For each title, the report shows any outstanding encumbrance and shows the predicted percentage change and renewal amount.

Notes

Each budget is reported separately. If an order has copies or percentages allocated to more than one budget, the order will appear more than once in the report. Although the unit cost shown in each place is the full predicted cost per copy, the total costs shown are for a single budget only: some percentage or fraction of the order's full total costs.

All report amounts are in the base currency of the system.

Sample report:

```

11 May 2010 - 01:57:36PM
                                Review Report
                                From 1-1-2010 To 31-1-2010
                                Inflation rate (%)=10
Budget 2800.6 / BDK books
Title/author/subno             PO             Supplier             Unit Cost             Cpy             Net Cost             Total Cost
Journal for serials librarians  201000145/0001 (1)Heinen             5.00                 1                 5.00                 0.00
98                               Projected cost :             5.50                 1                 0.00                 0.00
Budget total last ordered :             0.00
Budget total projected renewed :             0.00

```

```

-----
Budget subs / Serials subscriptions
Title/author/subno             PO             Supplier             Unit Cost             Cpy             Net Cost             Total Cost
Journal of binding techniques  201000146/0001 (1)Heinen             5.00                 1                 5.00                 0.00
84                               Projected cost :             5.50                 1                 0.00                 0.00
MC's aeronautical journal : the "fl 201000147/0001 (1)Heinen             5.00                 1                 5.00                 0.00
Smith, Richard                 Projected cost :             5.50                 1                 0.00                 0.00
40
Budget total last ordered :             0.00
Budget total projected renewed :             0.00

```

```

00
11 May 2010 - 01:57:36PM
                                Review Report
                                From 1-1-2010 To 31-1-2010
                                Inflation rate (%)=10
Title/author/subno             PO             Supplier             Unit Cost             Cpy             Net Cost             Total Cost
Grand total last ordered :             0.00
Grand total projected renewed :             0.00

```

```

00
11 May 2010 - 01:57:36PM
                                Review Report
                                From 1-1-2010 To 31-1-2010
                                Inflation rate (%)=10
Budget over committed
Budget                               Balance             Current year
0 Budget over committed

```

00

279.5 Renewal update process

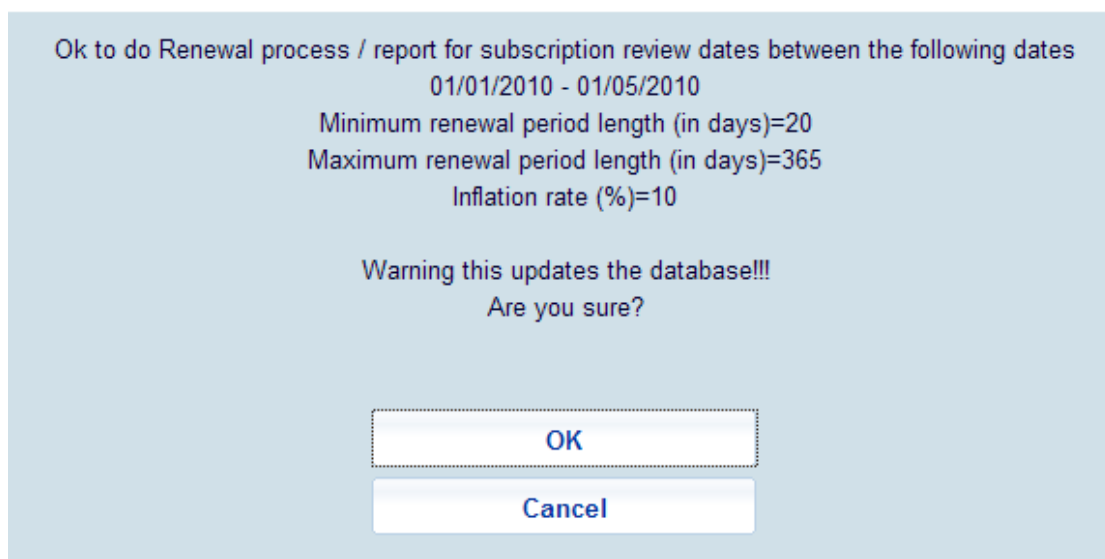
Use this option to generate the renewals. This job selects order records that meet the conditions described above. The job first checks that there is sufficient money in the budgets to encumber for the renewed orders. If even one budget is short, none of the renewals will take place.

For each subscription, the job will:

- reset the start date to end date +1

- reset the end date to old end date + renewal number of days
- reset the review date by adding the renewal number of days to it
- adjust the total price and commitment on the order
- adjust the commitment on the budget of the order

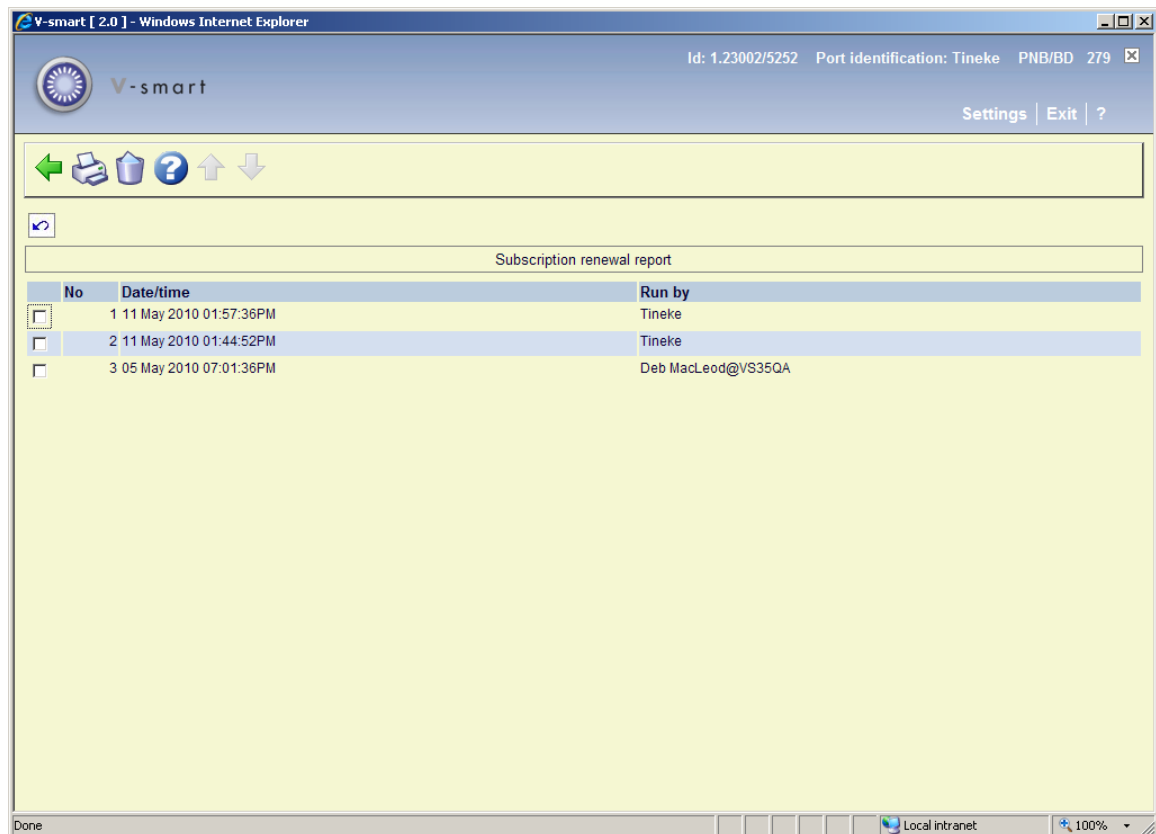
A message will be displayed that the process will run on the parameters from the Setup section:



When you click **OK**, the system will switch to the standard screen for scheduling processes.

279.6 Renewal report

With this option you can view the results of the renewal process. After selecting this option an overview screen will be displayed:



Options on the screen

Delete report: Select a line and then this option to delete the report from the list. The system will prompt for confirmation.

Print report: Select a line and then this option to print the report. The system will switch to the standard screen for generating output.

The report lists the orders in a sequence based on:

- 1) library
- 2) budget
- 3) title.
- 4) For each title, the report shows any outstanding encumbrance and shows the predicted percentage change and renewal amount.

Notes

Each budget is reported separately. If an order has copies or percentages allocated to more than one budget, the order will appear more than once in the report. Although the unit cost shown in each place is the full predicted cost per copy, the total costs shown are for a single budget only: some percentage or fraction of the order's full total costs.

All report amounts are in the base currency of the system.

Sample report:

```

11 May 2010 - 01:57:36PM
                                Renewal Report
                                From 1-1-2010 To 31-1-2010
                                Inflation rate (%)=10
Budget 2800.6 / BDK books
Title/author/subno      PO          Supplier      Unit Cost      Cpy      Net Cost      Total Cost
Journal for serials librarians  201000145/0001  (1)Heinen      5.00          1         5.00         0.00
98                      Projected cost :      5.50          1         0.00         0.00
Budget total last ordered :      0.00
Budget total projected renewed : 0.00
-----
Budget subs / Serials subscriptions
Title/author/subno      PO          Supplier      Unit Cost      Cpy      Net Cost      Total Cost
Journal of binding techniques  201000146/0001  (1)Heinen      5.00          1         5.00         0.00
84                      Projected cost :      5.50          1         0.00         0.00
MC's aeronautical journal : the "fl  201000147/0001  (1)Heinen      5.00          1         5.00         0.00
Smith, Richard          Projected cost :      5.50          1         0.00         0.00
40
Budget total last ordered :      0.00
Budget total projected renewed : 0.00
-----
00
11 May 2010 - 01:57:36PM
                                Renewal Report
                                From 1-1-2010 To 31-1-2010
                                Inflation rate (%)=10
Title/author/subno      PO          Supplier      Unit Cost      Cpy      Net Cost      Total Cost
Grand total last ordered :      0.00
Grand total projected renewed : 0.00
-----
00
11 May 2010 - 01:57:36PM
                                Renewal Report
                                From 1-1-2010 To 31-1-2010
                                Inflation rate (%)=10
Budgets over committed
Budget
                                Balance      Current year
0 Budgets over committed
-----
00

```

- **Document control - Change History**

Version	Date	Change description	Author
1.0	May 2010	Creation Delivered as part of 2.0.06 updates	