Manage user subscription service

Learn how to manage an ongoing subscription service. The User Subscription Services can be viewed and managed via the standard Users layout in the Users domain. Subscriptions taken out by an organisation can be viewed on the Organisations layout in the Organisations domain.

View User and Organisation Subscriptions

The Subs. Services Subs field on the User Services sheet on the standard Users layout lists the subscriptions that the user has to the various services your library offers.

A refined search can be run to enable you to search for users by the services they subscribe to:

1. Access the relevant search window, e.g. Users to and click on Refine Search. This displays a list of filter options you can apply to the current search window.
2. Select the option Active User Subs. Service Subs to search for users with an active subscription to the selected services.

The Subs. Services Subs field on the Organisations layout displays a list of subscriptions that the organisation has to the various services you offer. The Subs As Agent field displays the list of subscriptions that the organisation acts as an agent for. The actual organisation that the subscription is for is listed in the Service column.

Indirect User Subscriptions

A user can subscribe 'indirectly' to a service through the subscription that his/her parent organisation has taken out (as opposed to taking out a subscription directly themselves). These details will be displayed in the Org. Subs. field on the User Services sheet on the standard Users layout.

The -Linked field displays the user's list of current indirect subscriptions.

The Available field lists the subscriptions that the user's organisations have taken out which the user can take out an indirect subscription to.

1. To take out an indirect subscription, click on the service in the Available field and select the Subscribe user to this subscription option from the Actions box. This moves the organisation’s subscription from the Available field to the Linked field, thereby registering the indirect subscription.
2. To cancel an indirect subscription (without cancelling the organisation’s subscription itself), click on the service in the Linked field and select the Unsubscribe user from this subscription option from the Actions box.
3. This moves the service from the Linked field to the Available field, thereby cancelling the indirect subscription without cancelling the organisation’s subscription itself.
Suspend a Subscription Service

A user can suspend their subscription service:

1. Enter the date on which all of this user’s subscriptions should be suspended in the Suspend Subs On field. A process in daystart checks to see if there are any users whose subscriptions are due to be suspended that day. If there are, it automatically suspends these subscriptions.

2. Enter the reason for the suspension of the user’s subscriptions, for example, holiday in the Suspend Reasons field. This is a free-text field.

3. The Suspended? field is a Yes/No flag to indicate whether a user’s subscriptions have been temporarily suspended. This relates to all active subscriptions.

4. The date on which the user’s subscriptions should be re-activated can be entered in the Resume On field. A process in daystart checks to see if there are any users whose subscriptions are due to be re-activated that day. If there are, it automatically re-activates these subscriptions.

User Audit Trail

Any changes made to a user’s or organisation’s subscription service subscriptions are recorded in the user’s/organisation’s update audit trail. The changes made are shown on the Update Audit Trail sheet of the standard Users layout in the Users domain.

Field details include:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Shows the date the change was made.</td>
</tr>
<tr>
<td>Field Updated</td>
<td>Displays the name of the field to which the change was made.</td>
</tr>
<tr>
<td>Old Value</td>
<td>Displays the old field value</td>
</tr>
<tr>
<td>New Value</td>
<td>Displays the new field value</td>
</tr>
<tr>
<td>Change Made By</td>
<td>Displays the name of the person who made the changes.</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/OLIB/Users/User_subscription_services/Manage_user_subscription_ser...