Discover how to set automatic re-subscriptions in OLIB.

Overview

This information gives the steps for automatic re-subscription. Manual re-subscription is also available.

The automatic re-subscription process is designed to reduce the workload of re-subscription and is particularly appropriate for libraries which have a large number of subscriptions and do not require committed funds to be completely accurate. OLIB applies an across the board average price increase for all journals from a supplier. Financial details are corrected when the invoice is paid.

Note: Before serial re-subscription can be undertaken, all the new account instances for the next financial year must have been created and funds allocated. This can either be done manually or by the year end procedure, but it is quite likely that serial subscription renewal will be carried out for the majority of subscriptions several months before the calendar year end and this should be borne in mind when planning this operation.

What does automatic re-subscription do?

- Generates a new subscription (order item) record automatically, based on the account instance used for the current subscription, but for the following year.
- The new Order Items will have the same order number and Supplier as the original.
- The subscription dates move to the next year.
- Create Ser.Copies is null (otherwise multiple issue copies would be created).

Procedure

1. **Check in previous year’s subscriptions.**
   a. Navigate to Serials > Order Items.
   b. Run the Subscription Order Items Close to Expiry search. Enter the date in format 31-dec-2008.
   c. Select the subscription and choose Check In from the available Actions. The Order Items Check In page displays.
   d. In Ordered/Rec’d/Outst, enter the number of subscriptions to be checked in e.g. 1.
   e. Save the record and return to the hitlist view. Once the search is refreshed the subscription shows as Complete.

2. **Check Account Instances:** for the Automatic Re-subscription process to work all Account Instances for the new financial year must have been created and the ones in use for journal subscriptions must have funds allocated.
3. Apply % price increase to Supplier: The Automatic re-subscription process takes the price increase for each title from a percentage increase applied to the Supplier record. Navigate to Serials> Suppliers. Click the Supplier Details page and set the Annual Subscription Increase (%) field.

4. Auto Re-subscribe: This can be applied to a large number of subscriptions at the same time. It should not be used for any items where a change is to be made (e.g. reducing the number of copies). Navigate to the Serials> Order Items domain and use e.g. Subscription Order Items Close to Expiry.
   Note: If a large number of items are to be re-subscribed to at the same time, consider putting them into a folder before processing to ensure no items are missed.

5. Select all the titles for re-subscription. In available Actions, choose Auto Re-subscribe.

6. When you next run a search in Order Items, the new subscriptions will be visible.