Renew subscriptions
Last updated: Mon, 15 Mar 2021 18:03:25 GMT

Discover the suggested workflow for renewing subscriptions as well as the renewal process used in WorldShare Acquisitions.

A Subscription is an order for an item that is published in an ongoing manner (no end date), but typically purchased by period. It usually requires renewal by the purchaser at the end of the period.

Suggested workflow for renewing items

Items can only be renewed in bulk if they are from the same vendor and budget period. See Bulk renew subscriptions to renew items in bulk from different vendors and budget periods.

1. On the left navigation, click Orders > Subscription Items.
2. Click Search.
3. Filter items by Vendor, Budget Period, and Renewal Status.
4. Set Rows to 100 per page, if needed.
5. (Optional) Use additional values to filter the results.
6. Click the check box at the top left of the table to select all items.
7. Click Renew.
8. Go through the renewal process (see Renewal process, below).
9. If you are renewing over 100 items, repeat the renewal process for every page of records.
10. Place the order. For details on placing an order, see Place an order

Renewal process

1. Select the items you want to renew. Follow the Suggested workflow for renewing items above
2. Click Renew.
3. On the Renew Subscriptions window, click Start.
   Note: Items cannot be renewed if they have previously been renewed, they have not been ordered (the order was not placed), their Renewal Setting is marked as Do Not Renew, or all copies of the item have been canceled.
4. Enter a percentage by which the order price of the new item(s) should increase in the next renewal cycle. Enter 0 if the order price should not increase.
5. Click Next.
6. Select the Budget from the list.
   ◦ You can select the current budget or the next budget that is enabled for use.
   ◦ If there is only one budget in the list, you may need to enable the next budget for use. You can do this on the Create and edit budgets and funds screen.
7. In the fund table, select the fund(s) from the Fund Name list.

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Order/Renew_subscriptions
Printed: Sun, 28 Mar 2021 18:14:40 GMT
8. Click **Next**.

9. Select the radio button next to the order you are adding the renewal items to. To search for an order, use the search box and Order Type filter.
   - If you are using an existing order, the order must be **Open**.
   - If you need to create a new order, click **New Order**. For details on creating an order, see Create new order and View and edit an order.

10. Click **Next**.

11. Review the items that will be renewed. The start and end dates will be automatically incremented.

12. Click **Renew**.