Subscription Renewals

Introduction

The KB+ subscription renewals process is used to renew a subscription by creating a new subscription, with details copied from the old subscription (the one you are “renewing”), including information about coverage and core status.

It also enables you to edit this information as part of the process, and where necessary to accept defaults from a package (e.g. for journal start dates).

Once a new subscription is created it will have a new list of issue entitlements (i.e. the titles and coverage included in your subscription).

If you have a subscription to a multi-year package (e.g. JSTOR 2017-2018), then KB+ will update the package with transfers, title changes, ceased titles, etc., following the terms of the agreement. You should only complete the renewal process for these types of subscription at the end of the subscription period (in the example given above, end of 2018). Multi-year packages can be identified by the date range in their titles and by the fact that their start and end dates exceed a single year. For example, JSTOR:JISC Collections: Arts and Sciences VI Collections:2017-2018.

You can use the KB+ subscription comparison tool to compare your old (expired) and new subscriptions to help identify titles which have been added and removed from packages. Refer to the COMPARISON TOOLS GUIDE for details.

Setting and Viewing Manual Renewal Dates

Manual renewal dates may be set for subscriptions. These can help to remind you when a subscription is due for renewal. Subscriptions with manual renewal dates set are listed in the Upcoming renewals panel on your dashboard, as described below.

To set a manual renewal date, click Actions (1) at the top of the Subscription Details page (refer to the SUBSCRIPTIONS GUIDE for details of this page):
...and then click *Edit* on the menu that is then displayed:

A page displaying the current details of the subscription is then displayed:

![Subscription Details](image)

Enter the required date in YYYY-MM-DD format in the *Manual Renewal Date* field (3).
Alternately, click on the calendar icon 🗓️ next to the field. The Calendar pop-up is displayed:

Select the required date and click Confirm. The date is displayed in the field.

Click Save (4) to apply the change.

The renewal date is displayed in the Renewal Reminder panel of the Details tab of the Subscription Details page. For example:

**Upcoming Renewals**

Subscriptions with upcoming renewals are listed in the Upcoming renewals panel on your dashboard. They are listed in ascending order of manual renewal date (see above):
The number of upcoming renewals is also displayed.

The Renewal Process - Overview

The renewal procedure consists of four steps:

1. Creating a renewal worksheet (an Excel file) from the old (expired) subscription
2. Exporting the renewal worksheet showing details of the current subscription and renewal options
3. Editing the renewal worksheet as required with details of the new subscription
4. Importing the renewal worksheet to KB+ to create a new (renewed) subscription

Creating the Renewal Worksheet

The first step in the renewals process is to create a renewal worksheet from the expired or (about to expire) subscription.

Access the Your subscriptions page and find the subscription you want to renew, then open its Subscription Details page. Refer to the SUBSCRIPTIONS GUIDE for how to do this.

On the Subscription Details page, open the Details tab (1) and click Start Renewals Process for Subscription <subscription number> (2).

![Subscription Details page with Details tab and Start Renewals Process button highlighted.](image-url)
Please note that if you open the Subscriptions menu and click the *Generate renewals worksheet* option (3), the information from your expired (or about to expire) subscription will be missing.

The *Generate renewals spreadsheet* page is then displayed:
The list of packages that you can add to the renewed subscription are listed below the search panel (1).

**Searching the List of Packages**

To search and filter this list, enter all or part of the name of a package in the search field provided (2).

Note that:

- You must enter whole words. The search will not look for matches in parts of words. For example, if you were searching for *American* it would not be sufficient to enter *America*.
- The search will search for matches with any of the words you enter (unless you put a phrase in quotations - see below). For example, if you searched for *American Chemical*, all packages with either word in their name will be returned.
- To search for a phrase, enter it in quotations, for example "American Chemical". The search will then only look for matches to that exact phrase.
- The search is not case sensitive. In other words, searching for "American Chemical" and "american chemical" will return the same results.
To filter the search further, by consortium name, content provider, start year, end year, and/or type, click Filter Search (3). These additional options are then displayed:

Select an entry from one or more of these lists. Only packages that match the values you selected will be returned by the search.

Click the Search button (4) to initiate the search. The results are displayed below the search panel (1).

To clear the search criteria and results and return the complete list of packages, click Reset (5).

**Selecting Packages**

To view the full details of a package, click on its name in the list of packages (6). The Package Details page for the package is then displayed. Refer to the PACKAGES GUIDE for details.

To select a package for the renewed subscription, click its button in the Action column (7). Repeat this for all the packages to be included in the subscription.

The number and the names of the packages you have added are displayed in the Basket Items panel (8).

To empty the “basket” and start the process of adding packages again, click the Clear Basket button (9). Please note that your expired (or about to expire subscription information will also be deleted.

When you have selected all the required packages, click Create Renewals Worksheet (10) to move to the next step of the renewals process.

**Exporting the Renewal Worksheet**

When you click the Create Renewals Worksheet button (see above), you will be prompted to open or save an Excel file called comparison.xls:
This is renewal worksheet. Open the file (or save it then open it). You will see something like the example here:

The worksheet will be populated with your existing subscription information and the details of the selected package(s). The spreadsheet is colour-coded to make a quick visual comparison of packages easy.

The worksheet consists of the following columns:

- TitleID
Subscription Renewals

- Title
- ISSN
- eISSN
- Current Start Date
- Current End Date
- Current Coverage Depth
- Current Coverage Note
- Core Status: This field has 3 possible values:
  - True(now): the title is a core title at the present date.
  - False(now): the title is not core at the present date, but it has been in the past, or it is a core title in another subscription/supplier.
  - False(never): the title is not and has never been core.
- Core Status Checked: the date when the core status was checked.
- Core Medium: valid values: P = Print; E = Electronic; P+E = Print+Electronic [Please note that Y = Yes and N = No are no longer valid entries]
- JUSP JR1 stats – per year recorded.
- Current Sub – contains details of the current subscription, colour-coded as follows:
  - Coloured green if the title is in the current subscription
  - Coloured yellow if the title has a core status set in the current subscription

This worksheet must now be edited to include the details of the renewed subscription, as described next.

**Editing the Renewal Worksheet**

The editing procedure is as follows:

1. Identify the column headed with the package name for your selected package. You will use this as the basis of the renewal.
2. Edit this column adding to each cell either “Y” or “N”.
   - If the cell is marked with a “Y” it will be included in the new subscription.
   - If it is marked “N” it will not be added to the new subscription.
3. For each row you have marked with a “Y” you may also need to edit these columns:
   - Current Start Date [format yyyy/mm/dd]
   - Current End Date [format yyyy/mm/dd]
   - Core Medium [valid values: Y = Yes; N = No; P = Print; E = Electronic; P+E = Print + Electronic]

If these columns have a value in them, this is the value that will be used when creating the new subscription. If they are blank, default values from the selected package will be used. Leave the Current Start Date blank to ensure you use the default start date from the candidate package.
For example, if 3 of the current titles are to be included in the new subscription, one title is to be dropped, and two new titles to be added:

- Leave the 3 current titles with the same start/end dates and core details (unless you update them).
- The new titles will take the default values from the package.

All the other details can be edited once the subscription has been created (refer to the SUBSCRIPTIONS GUIDE and to TITLES GUIDE for details).

Once the spreadsheet has been edited appropriately, it can be imported into KB+ to create the new (renewed) subscription. The file must be saved as an .xls file.

## Importing the Renewal Worksheet

To import the worksheet and create the new/renewed subscription in KB+, open the Subscriptions menu and click the Import renewals worksheet option (1):

![Import renewals worksheet](image)
The *Import renewals spreadsheet* page is then displayed:

Click the *Actions* button (2) and then *Upload*:

The *Upload Renewals Worksheet* page is then displayed:

Click *Find File* to browse of the renewals .xls file you saved, then click *Upload*.

The details of the subscription (3), including packages and titles (4) will then appear on the *Import renewals spreadsheet* page.
For example:

Click **Accept and Process (5)** to create the new/renewed subscription. The **Subscription Details** page of the subscription will then be displayed:
You can now edit the details of this subscription (including giving it a proper name). Refer to the
SUBSCRIPTIONS GUIDE for details.