Add new subscription to user subscription record

Learn how to add a new subscription to a service in OLIB.

New subscriptions to a service can be added in one of a number of ways:

• by clicking **New** in the Users field on the subscription service layout;

• by clicking **New** in the Organisations field on the subscription service layout;

• by clicking **New** in the Subs. Services Subs. field on the User Services sheet of the Users layout

• by clicking **New** in the Subscription Services field on the Organisations layout.

Whatever method is chosen, the Subscription Record Details, the User Subs Services Users layout is displayed.

When adding a new record depending on which method is chosen - the Subs Service field, the User field or the Organisation field will be pre-filled with the record that you opened the screen from.

Existing subscriptions can be edited by checking the box in the respective subscription record in any of the above fields and in Actions select View/edit subs. details. This displays the Subscription Record Details, the User Subs Services Users layout.

Enter the details in the User Subs Services Users layout as follows:

1. The Record No field is populated with a system generated code.

2. Select the subscription service that this subscription relates to from the drop down list in the Subs Service field. For example, Current Awareness Service. When adding a new record, if you came to this layout from the Subscription Service layout, this field will default to the service you came from, but it can be changed if required.

3. Next you need to enter the user or organisation who is taking out the subscription in either the User or Organisation field. These fields are mutually exclusive. When adding a new record, if you came to this screen from a user record, the user will default into this field. If you came to the screen from an organisation record, the organisation will default in. You can change to a different user/organisation if required by clicking Search.

4. For subscriptions that are taken out by an organisation, you can specify a different organisation to act as the agent for that organisation’s subscriptions. For example, for payment actions. Enter the details of the agent in the Agent field.

5. The number of copies of the item which are supplied as part of the service can be entered in the No. Copies field. This is for information purposes only.

6. The cost of the subscription should be entered in the Cost field. If you have entered a value in the User Subscription Service record’s Cost field, this will default into the subscription's cost field when a new subscription is added. It can be set to a different value if required.

7. In the Start Date field enter the date on which the subscription begins. When entering a new subscription, this defaults to the current system date.
8. Enter the current status of the subscription in the Status field.

9. The Previous Status field is not currently implemented.

10. Enter the date on which the subscription is due for renewal in the Renewal Date field. If you have entered a value in the User Subscription Service record’s Expiry/Renewal field, the subscription’s Renewal Date field defaults to the current system date plus the number of days specified in the Expiry/Renewal field. If the Expiry/Renewal field is blank, the subscription’s Renewal Date field defaults to a year ahead.

11. Subscription renewal notices are sent out in advance of the actual renewal date as follows - If the subscription’s Warn Before Renewal field is set, the renewal notice is sent this number of days before the renewal date (This field takes precedent ). If the Days Before Expiry field in the subscription renewal alert notice record is set, the renewal notice is sent this number of days before the renewal date. If neither field is set, the renewal notice is not sent.

12. You can stop the system from sending renewal alerts for individual subscriptions by setting the Send Renewal Alert field to No. If it is set to Yes or if it is left blank, the renewal alert will be sent in accordance with the other settings described above.

13. The Send To field - Normally, the renewal alert is sent directly to the user and so for individual subscriptions this field does not need to be populated. However, for organisations’ subscriptions (including those which are managed by an agent), it is not possible to specify in the organisation record who should receive the alert. So for organisations’ subscriptions you should specify who the alert should be sent to in the Send To field.

14. The Last Renewed field is not currently implemented.

15. The Payment Detail field is free-text field to allow you to record the payment history for this subscription.

16. In the Suspend On field enter the date on which the subscription should be automatically suspended.

17. A process in daystart checks to see if there are any subscriptions that are due to be suspended that day. If there are, it removes the date from the Suspend On field, clears the Reason For Suspension field and sets Suspended to Yes. If you enter a date in the Suspend On field, you should also if possible enter a date in the Resume On field so that the suspension is removed automatically at the appropriate time. NB: the Suspend On fields on the subscription layout only relate to that subscription. The parallel set of fields on the users layout are not affected by the ones on the subscription layout.

18. The Reason For Suspension is a free-text field for you to enter a reason for the suspension.

19. The Suspended? field is a Yes/No field to indicate whether the subscription has been temporarily suspended. This is set to Yes and No by the daystart process, depending on the dates in the Suspend On and Resume On fields.

20. Enter the date on which the temporary suspension should be removed in the Resume On field. As with the Suspend On field, a process in daystart checks to see if there are any subscriptions that are due to be unsuspended that day. If there are, it removes the date from the Resume On field and sets Suspended to No.

21. The Email Address field is used for the bulletin production module only.