



# Using Alma to Manage e-resource Renewals

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SLSS

[www.suny.edu](http://www.suny.edu)





# Assess where you are right now

- ❖ Are you using Alma for acquisitions?
- ❖ Have you created orders (POLs) for all your activations?
- ❖ What is the timing of your renewals – in real life?
- ❖ How many titles are you renewing?

A photograph of a large, multi-story brick building with many windows, surrounded by green trees and a paved walkway. The image is overlaid with a semi-transparent blue filter.

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[video]

[Electronic Resources – Scenarios and Workflows](#)  
[documentation]



Hot off the  
press!!

<https://exlibris.libguides.com/alma>



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## Alma: Welcome

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### Ex Libris Google Search

Search the Ex Libris Knowledge Center, Developer Network, and Trust Center.

### Useful Resources

- [Alma Community Listserv](#)
- [Alma Community Knowledge](#)
- [Alma Knowledge Center](#)
- [Alma Glossary](#)
- [Alma Essentials](#)
- [Alma Administration Certification](#)
- [Conference Presentations](#)


### Welcome to Alma




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**RELEASE  
NOTES**





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Documentation

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# SLSS training

[ERM & Discovery Training](#) series – Wednesdays at 11:00 AM

Alma Spring Workshops 2020

In-person & online

[Registration](#)



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## The renewal process begins at the time of the original order

- ❖ Using correct order type
- ❖ Entering applicable dates
- ❖ Selecting manual or auto renewal





# Using correct order type

- ❖ Access Service – Subscription
- ❖ Electronic Book – Subscription
- ❖ Electronic Collection – Subscription
- ❖ Electronic Title – Subscription
- ❖ Other Service – Subscription

[Purchase Order Line Details](#) [Back](#)

AP images [electronic resource], Accuweather/AP, 1998-, [i](#) [v](#)


<b>PO line</b>	POL-1961	<b>PO</b>	PO-4903	<b>Status</b>	Waiting for Renewal (2019-08-16)
<b>PO line type</b>	Electronic Title - Subscription	<b>PO line owner</b>	Drake Memorial Library	<b>Sent date</b>	08/16/2019

[Summary](#) [Description](#) [Alerts](#) [Invoice Lines](#) [Associated PO Lines](#) [Communications](#) [Interested Users](#) [History](#) [Notes](#) [Attachments](#)

**Important!**  
Order type cannot be changed, once POL is created.  
(as well as vendor / acq method)

# Entering applicable dates

Renewal	
Manual renewal	Yes
Subscription from date	-
Subscription to date	-
Renewal date	08/01/2020
Renewal reminder period (days)	90




**Subscription from/to are not required, but they will help you, in the long run!**



# Selecting manual or auto renewal

Renewal	
Manual renewal	Yes
Subscription from date	-
Renewal date	08/01/2020
Subscription to date	-
Renewal reminder period (days)	90



.... and deciding when you want to me reminded

## MANUAL vs. AUTO renewals

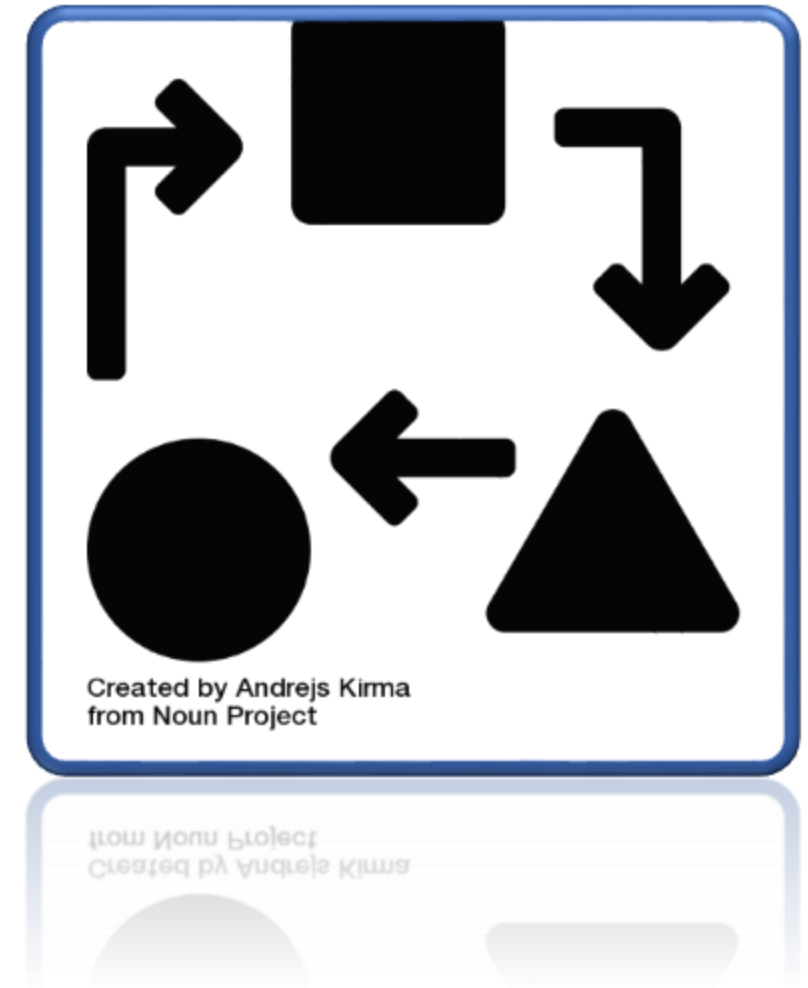
Much depends on the volume, and timing, of your orders, plus how you manage them, off-line (procurement, etc).


[PO Line – Renewal](#) job processes both types.

For auto process, new renewal date is entered for you.

**Renewal date + renewal cycle = new renewal date.**


Send Salesforce case to request ExL enable the job for you.








Renewal

Manual renewal ☐

Subscription from date **04/01/2019** X 

Subscription to date **03/31/2020** X 

Renewal date \* **03/31/2020** X  

Renewal cycle \* **1 Year** ▼

Renewal reminder period (days) \* **90**

(Don't try to enter 4/1/2020 -- it won't work)

**PO Line – Renewal job runs approx. 12/31/2019**



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## ExLibris Documentation

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/020Acquisitions/040Renewals/010Renewal\\_Workflow](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/040Renewals/010Renewal_Workflow)

# Acquisitions workflow

## WAITING FOR RENEWAL

Status of continuous electronic POLs once they are activated and the user selects Done in the task list.

Prior to this, POL is in status SENT.

## AUTOMATIC RENEWAL

Daily job -- all POLs with status Waiting for Renewal (and) renewal date = the current date.

For the purposes of this calculation, renewal date = renewal date (from POL) minus the renewal notification period.

After the job runs, status is still/again WAITING FOR RENEWAL.





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## ExLibris Documentation

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/020Acquisitions/040Renewals/010Renewal\\_Workflow](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/040Renewals/010Renewal_Workflow)

# Acquisitions workflow

## MANUAL RENEWAL

Daily job -- all POLs with status Waiting for Renewal (and) renewal date = the current date.

For the purposes of this calculation, renewal date = renewal date (from POL) minus the renewal notification period.

After the job runs, new status is  
WAITING FOR MANUAL RENEWAL.

POL appears in your task list.

## < Monitor Jobs

[Cancel](#)[Scheduled](#)[Running](#)[History](#)

1 - 20 of 150

Job details ▾

[Refresh](#)

Job Category : All ▾

Status : All ▾

Submit Date Range

02/13/2019 - 02/13/2020



	↕ Name	↕ Job ID	↕ Job Category	↕ Operator	▼ Submit Date	↕ Start Date	↕ End Date	↕ Status	
1	<a href="#">PO Line - Renewal</a>	176359988000...	Acquisition	System	02/08/2020 10:00:02 EST	02/08/2020 10:00:02 EST	02/08/2020 10:01:48 EST	✔ Completed Successfully	...
2	<a href="#">PO Line - Renewal</a>	175219316000...	Acquisition	System	02/07/2020 10:00:10 EST	02/07/2020 10:02:24 EST	02/07/2020 10:02:34 EST	✔ Completed Successfully	...
3	<a href="#">PO Line - Renewal</a>	174118457000...	Acquisition	System	02/06/2020 10:00:04 EST	02/06/2020 10:00:04 EST	02/06/2020 10:01:55 EST	✔ Completed Successfully	...
4	<a href="#">PO Line - Renewal</a>	173016899000...	Acquisition	System	02/05/2020 10:00:08 EST	02/05/2020 10:00:22 EST	02/05/2020 10:00:33 EST	✔ Completed Successfully	...
5	<a href="#">PO Line - Renewal</a>	171923823000...	Acquisition	System	02/04/2020 10:00:07 EST	02/04/2020 10:03:17 EST	02/04/2020 10:03:28 EST	✔ Completed Successfully	...
6	<a href="#">PO Line - Renewal</a>	170819962000...	Acquisition	System	02/03/2020 10:00:23 EST	02/03/2020 10:01:37 EST	02/03/2020 10:01:48 EST	✔ Completed Successfully	...
7	<a href="#">PO Line - Renewal</a>	169725191000...	Acquisition	System	02/02/2020 10:00:01 EST	02/02/2020 10:00:01 EST	02/02/2020 10:01:42 EST	✔ Completed Successfully	...
8	<a href="#">PO Line - Renewal</a>	168639677000...	Acquisition	System	02/01/2020 10:00:02 EST	02/01/2020 10:00:02 EST	02/01/2020 10:01:26 EST	✔ Completed Successfully	...

Report error(s):  
Zero renewals?  
Missing vendor email?

(Good case for turning off notifications)

< Job Report

Back



### PO Line - Renewal



Completed  
Successfully

**Process ID** 1686396770004805  
**Finished on** 02/01/2020 10:01:26 EST  
**Status** Completed Successfully  
**Records processed** 0

**Started on** 02/01/2020 10:00:02 EST  
**Total run time** 1 Minutes 24 Seconds  
**Status date** 02/01/2020 10:01:26 EST  
**Records with exceptions** 0

Job Events



Export Events

PO line sending renewal email failed(0)

Alma Configuration

Configuring

SUNY Empire State College

Filter List

Look-up or select

Acquisitions

Resources

Discovery

Fulfillment

User Management

General

Analytics

Purchase Orders

Reporting Codes

Secondary Reporting Codes

Tertiary Reporting Codes

Purchasing Review Rules

Shipping Method

PO Line Cancellation Reasons

PO Line Types

PO Line Deferral Reasons

Acquisition Method

EDI Vendor Note Fields

Invoices

Invoice Review Rules

Invoice Approval Rules

Disapproval Reasons

VAT Codes

Payment Method

Licenses

Sections Order

Manage License Terms

License Storage Location

Access Model

License Review Status

Discovery Interface Labels Customized

License Term Controlled Vocabulary

General

Other Settings

Currency Subset

Fund and Ledger Fiscal Period

Receiving Department Validations

Fund Types

Acquisition Jobs Configuration

Subscribers

Purchase Request Reject Reasons

Legal Deposit Reports

Survey Question Multiple Choice

# Disable vendor notifications

\* Institution level

parameter value	free text description	Managed in Network	Updated By	Last Updated	
2500			exL_impl	10/21/2018	...
false	If true then invoice price will be cc		-	-	...
false			exL_impl	10/21/2018	...
INV-			-	-	...
true	Dont send invoices to ERP.		exL_impl	10/21/2018	...
false			-	-	...
true			-	-	...
false			-	-	...
false			-	-	...
25	po_line_calc_co_next_step_on_receive	acquisition	false		...
26	po_line_prefix	acquisition	POL-		...
27	po_line_remove_interested_users	acquisition	false		...
28	po_line_send_notification_to_vendor_on_r	acquisition	true		...
29	po_packed_by_fund	acquisition	false		...
30	po_prefix	acquisition	PO-		...
31	po_handle_childless_bib	acquisition		Handling empty bib when POL is c	...
32	purchase_request_import_profile	acquisition		Holds the import profile name for	...
33	release_remaining_encumbrance_for_edi	acquisition	true		...





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# What if I change my mind??

## Changing status "Waiting for manual renewal" in bulk



- **Product:** Alma

### *Description*

We have a lot of PO lines in status "Waiting for manual renewal" and want to push them to automatic renewal. How do we do it?

### *Resolution*

First step is to remove the "Manual renewal" checkbox for all these orders. You do it by creating a set and running the "Change PO Lines Information" over this set. Set "Manual renewal" to "No".

However, this will not change the status. Now you need to wait for the PO Line renewal job - this will update the PO Lines to the correct status "Waiting for renewal".

**NOTE:** This solution will work only if the renewal date is in the future. Unfortunately there is currently no way to move renewal dates in the bulk.

[Changing status "Waiting for manual renewal" in bulk](#)



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## Needs verification!

My assumption is that the renewal process keeps the same fund numbers in the POLs.

Funds would be updated/re-encumbered when the year-end rollover processes are complete.



# Other renewal task/processes

## Overlap and Collection Analysis

Resources -->  
Advanced Tools --->  
Overlap and Collection Analysis

### Overlap and Collection Analysis

#### Report History

Report name

[Submit New Report](#) [Refresh](#)

Filter: **Selected Titles**

No records were found.

[Documentation](#)

## Managing Licenses

Acquisitions -->  
Acquisitions Infrastructure -->  
Licenses

### License Details

[Save as template](#) [Print license](#) [Cancel](#) [Save](#)

Creation date	02/13/2020	Created by	SUNY, SLC	License type	License
<div>Summary   License Terms   Inventory   PO Lines   Group Settings   Administrators</div>					
Name *	<input type="text"/>		License code *	<input type="text"/>	
License status	Draft		Licensor	Select from a list	
Signed by	<input type="text"/>		Signed on	<input type="text"/>	
Second party's Signed by	<input type="text"/>		Second party's Signed on	<input type="text"/>	
Start date *	02/13/2020		End date	<input type="text"/>	
License location	Finance Office		License review status	Pending	
License URI	<input type="text"/>		Licensing agent	Select from a list	

[Documentation](#)



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## SUNY Library Shared Services

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Created by Adrien Coquet  
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[SLSS Alma & Primo VE Training](#)

*Questions??*  
*Suggestions???*





Thank you for attending today!

