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## Processing Renewals

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### Note

This page describes how to process renewals in Alma. For the renewal workflow see [Renewal Workflow](#). For information on the overall purchasing workflow see [Purchasing Workflow](#). For an overview of working with acquisitions in Alma, including links to relevant sections such as Infrastructure, Invoicing, Configuration, etc., see [Introduction to Acquisitions](#).

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To process renewals, you must have the following role:

- Purchasing Operator
- Purchasing Manager

You can edit PO lines marked for automatic or manual renewal at any time. However, you cannot edit the vendors or acquisition methods of these PO lines. You can also renew PO lines that are earmarked for manual renewal by editing their renewal date.

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### Note

Renewals can be processed only after the [PO Line – Renewal job](#) has run. (The job must be marked as **Active** on the Monitor Jobs page.)

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You access and edit PO lines that are marked for renewal in the PO Lines task list (**Acquisitions > Purchase Order Lines > All PO Lines**). You can find the PO lines in this category by using the facets to filter the list for the following **Workflow Steps** (see [Searching for PO Lines](#)):

- **Waiting for Manual Renewal** – PO lines that must be renewed manually, and have reached the date at which they can be renewed
  - **Recurring Renewal** – PO lines that renew automatically, and PO lines that must be renewed manually, but are not currently **Waiting for Manual Renewal**
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## Editing PO Line Information – Renewals

PO lines that are marked for renewal can be edited to correct incorrect information, to add missing information, or to manually perform a renewal, in the **Details** pane. For information about the fields of a PO line, see [Manually Creating a PO Line](#). For information about working with the **Details** pane, see [New Layout 2022](#).

You can edit any PO line that is assigned to you. If a PO line is assigned to another user, you can view it but you cannot edit it. Purchasing Operators and Managers can edit unassigned PO lines, but users without either of these roles cannot. For information about changing the user assignment of a PO line, see [Available Actions](#), below.

### To edit a PO line:

1. Do one of the following to enter Edit mode:

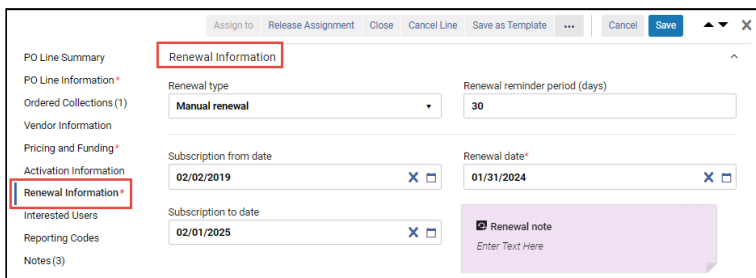
- In the task list, select the **Edit** button (  ).
- If the **Details** pane is opened, select the **Edit** button (  ) that appears at the top of the pane.

2. In the **Details** pane, edit the fields as required.

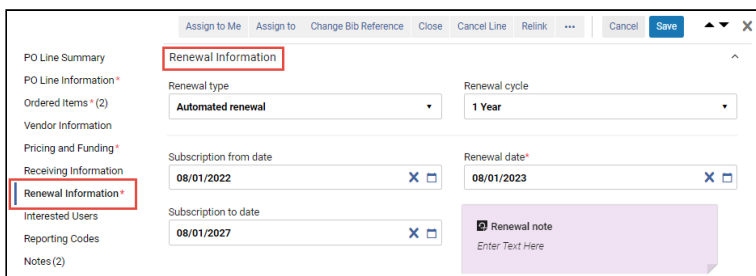
3. When you have finished editing the PO line, select **Save** in its row actions. The changes you made are saved. If you edited the **Renewal date** of a PO line that was waiting for manual renewal, the subscription is also renewed for the period ending on the new **Renewal date**, and a notification is sent to the vendor.

## Editing Renewal Settings

Renewal settings for continuous PO lines can be viewed and edited in the **Renewal Information** section of the **Details** pane. For information about these fields, see [Manually Creating a PO Line](#). For information about performing a manual renewal, see [Managing Manual Renewals](#), below.



### Renewal Information - Manual Renewal (Edit Mode)



### Renewal Information - Automatic Renewal (Edit Mode)

## Available Actions

The following actions are available in the row actions of PO lines that are marked for renewal (not all actions are available for all PO lines):

- **Assign to Me** – Assign the PO line to yourself.
- **Assign to** – Open a dialog box in which you can assign the PO line to another user. (If you do not have the necessary roles, you will not see this option.)
- **Release Assignment** – For PO lines that are assigned to you, release the assignment and leave the PO line

unassigned.

- **Relink** – Change the bibliographic record to which the PO line is linked (see [Relinking PO Lines](#)).
- **Cancel Line** — The PO line is not renewed and is cancelled. A dialog box appears, requesting a reason for the cancellation and, if vendor notification is configured, a cancellation notification is sent to the vendor (see [Cancelling PO Lines](#)). Note that cancelling the PO line will create a disencumbrance in the fund.
- **Change Bib Reference** – Change the bibliographic record of the PO line. See [Changing Bibliographic Reference](#).
- **Save** – Save the changes you made to the PO line.
- **Save and Request Evaluation** – The information you entered is saved and a trial is requested. Use this option if the PO line is assigned to you but you do not have the Trial Operator/Trial Manager role. The PO line's status changes to **Under Evaluation** and the PO line moves to the Manage Trials page with the status **Requested**, where the Trial Operator/Trial Manager can access it and continue with the evaluation workflow (see [Evaluation Workflow](#)). This option is available only for electronic PO lines that create inventory.
- **Save and Start Trial** – The information you entered is saved and a trial is started. Use this option if you have the Trial Operator/Trial Manager role, the PO line is assigned to you, and you want to start the trial. The PO line's status changes to **Under Evaluation** and the Trial Details page opens (continue with the evaluation workflow at step 3). This option is available only for electronic PO lines that create inventory.
- **Change Vendor** - See [Changing Vendors - Renewals](#).
- **Close** – The PO line is closed. Select **Confirm** in the confirmation dialog box to close the PO line (see [Closing PO Lines](#)).
- **Save as Template** – Save the current settings as a template; see [Managing PO Line Templates](#).
- **Change Expected Date** – For items in claim, enter a new expected receipt date or expected activation date that was received from the vendor. See [Processing Claims](#).
- **Download EDI File** – For EDI vendors, download the PO that contains the PO line as an EDI file. The EDI file is created ad hoc based on the current data of the order. See [Packaging PO Lines into a PO](#).

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## Managing Manual Renewals

For continuous PO lines, a **Renewal Information** section is included in the PO line details. You can see and edit this information for the selected PO line in the **Details** pane.

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## Locating PO Lines that Are Waiting for Manual Renewal

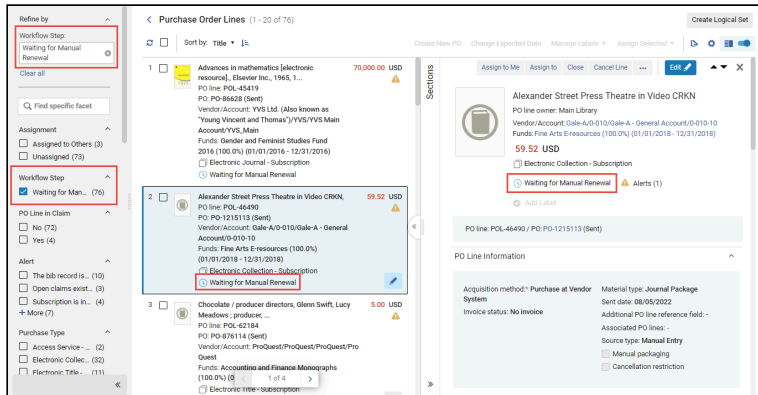
When the PO Line - Renewal job runs, the Workflow Steps of the PO Lines that are due for manual renewal are changed to **Waiting for Manual Renewal**. A list of PO lines that currently require manual renewal can be opened by filtering the list of PO lines in the task list to only show those that are in this Workflow Step. You can open the task list with this filter turned on, or turn on the filter from the facets at any point when the task list is open.

**To open the PO Lines task list with the *Waiting for Manual Renewal* filter turned on, do one of the following:**

- Navigate to **Acquisitions > Purchase Order Lines > Renew**.
- In the persistent menu, in the **Tasks** list, select **Order Lines > Renew** (see [Tasks in the Task List](#)).

**To turn on the *Waiting for Manual Renewal* filter when you already have the PO Lines task list open:**

- In the **Facets**, under **Workflow Step**, select **Waiting for Manual Renewal**. (For additional information about working with the facets, see [New Layout 2022](#).)



**PO Lines Task List Filtered for PO Lines Requiring Manual Renewal**

## Performing a Manual Renewal

If a PO line is marked for manual renewal, when the renewal date arrives, its Workflow Step is changed to **Waiting for Manual Renewal**. You can then manually update the renewal date and any other fields in the **Renewal Information** section of the PO line's **Details** pane that require modification.

### Note

The fund and price are taken from the previous year if a PO Line Rollover was done (see [Fiscal Period Closure](#)). However you can manually edit the value if needed.

### To manually renew a PO line:

1. In the PO Line list, in the **Details** pane of the PO line, in the **Renewal Information** section, modify the **Renewal date** of the PO line to the last date of the next subscription period.
2. Select **Save**. The subscription is renewed for the period ending on the new **Renewal date**. When this date minus the renewal reminder is a future date, the **Workflow Step** of the PO line is once again set to **Recurring Renewal**, and a notification is sent to the vendor.

See [Renewal Workflow](#) for an overview of the process.

## Cancelling a Subscription

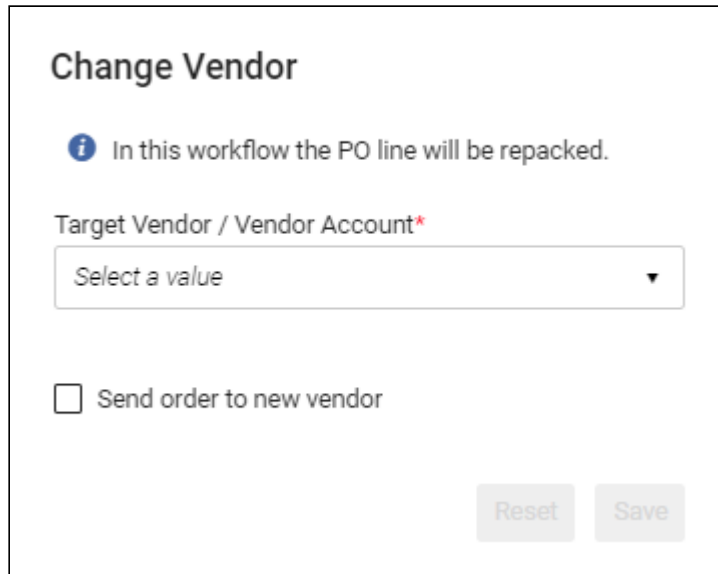
If a PO line is marked for manual renewal and you do not want to renew it, you can cancel it as described in [Available Actions](#).

## Changing Vendors – Renewals

You can change the vendor to which the PO line is sent when renewing the PO line. Changing the vendor closes the PO line and creates a new one.

## To change the vendor:

1. After you have completed editing the PO line (see [Editing PO Line Information – Renewals](#)), select **Change Vendor**. The **Change Vendor** dialog box appears:



**Change Vendor**

**i** In this workflow the PO line will be repacked.

Target Vendor / Vendor Account\*

Select a value ▼

Send order to new vendor

Reset Save

### Change Vendor Dialog Box

2. Select the target vendor/account,
3. If you want to send the new order to the target vendor, select **Send order to new vendor**.
4. Select **Save**. The following occurs:
  - The current PO line is closed.
  - A new PO line for the new target vendor/account is created.
  - The new PO line is associated with inventory from the closed PO line.
  - The new PO line is set to In Review status from which the operator can update the new PO line with new information, according to the information communicated with the new target vendor.

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## Vendor Controlled Renewals

To save duplication of work by simultaneously renewing the vendor subscription and the matching continuous PO line in Alma, you can enable a vendor to automatically update a PO line once the subscription is renewed on the vendor side. At this time, the option is available for ProQuest (RenewMe) and EBSCO (EBSCONET) renewable subscriptions.

To enable this functionality for ProQuest renewable subscriptions, please contact ProQuest RenewMe customer support at: [e-renewals@proquest.com](mailto:e-renewals@proquest.com).

To enable this functionality for EBSCONET renewable subscriptions, please contact the EBSCO Integration support team at [ils-ediservices@ebSCO.com](mailto:ils-ediservices@ebSCO.com).

## To configure vendor controlled renewals:

1. Generate the API key. To do so, see the [Developer Network](#).

### Add/Edit API Key

2. Supply the vendor with your API key to allow the vendor to perform updates to the PO line in Alma.
  - For ProQuest, send the API key to [e-renewals@proquest.com](mailto:e-renewals@proquest.com).
  - For EBSCONET, enter the API key within the designated field while setting up the EBSCONET ILS integration profile [see more instructions here](#).
3. When the renewal process completes, the matching Alma PO line is updated automatically with:
  - Price
  - (Next) Renewal Date
  - Renewal Note - populated with the renewal information sent from the vendor.

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### Note

EBSCONET customers can customize which fields in Alma's PO line will be updated upon renewal

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### For ProQuest renewals, users have the option to launch the Renewme subscription renewal from within Alma:

1. After the functionality is enabled by ProQuest RenewMe customer support, go to **Acquisitions > Vendors > [select Edit from the row actions of the vendor] > Vendor Details > System Integration**.
2. Select the **Renew at Vendor System** checkbox.
3. Select the **System Type**.

## Vendor Details > System Integration

4. Select **Save**. From this point onward, a **Renew at vendor system** button is added to the Purchase Order Line Details page of all continuous PO lines associated with the vendor.

When you select this button, a ProQuest RenewMe form which includes the Alma PO line number opens (in a separate browser tab). Select **Continue** to progress to the RenewMe payment page. For more information on how to renew the subscription in ProQuest, see the [RenewMe program](#) site.

When the renewal process completes, the matching Alma PO line is updated automatically with:

- Price
- (Next) Renewal Date
- Renewal Note - populated with the renewal information sent by the vendor.

This process can also be launched from the vendor's email notification, which is sent to your institution periodically.

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### Note

The number of the matching PO line should be included in the vendor's renewal form. If the PO line number is missing, the PO line is not renewed in Alma.

If you are adding a new subscription on the vendor platform, and a new matching PO line in Alma, you must contact the vendor and give them the PO line number to associate with the subscription.

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