Overview

What is Knowledge Base+?

Knowledge Base+ (KB+) helps libraries to manage their e-resources more efficiently by providing accurate publication, subscription, licence information and a set of library management tools.

KB+ helps to ensure that all parts of a library’s supply chain have access to all the information they need whenever they need to avoid duplication of effort. It is a one-stop shop for the management of e-resource information.

KB+ provides:

- A centrally maintained and managed knowledge base in which we collate, verify and update knowledge base metadata for e-journal, e-book and databases, including national and regional consortium agreements from across the UK. For a full list of the packages available from KB+ please visit the public exports page (https://www.kbplus.ac.uk/kbplus7/publicExport/index)
- Subscription and Licence management tools that enable librarians to customise, compare, and download information to be reused and share (exports formatted for use with link resolvers to avoid costly and wasteful duplication of effort by libraries all trying to do the same thing by themselves).
- Licence information for Jisc Collections’ licence agreements in different human and machine-readable formats. Institutions can create their own licence information, making use of templates created by us or their own licences.
- Subscription tools to help you track details of entitlements and journal coverage, manage renewals, compare different journal packages, and view usage statistics from JUSP.
- Finance module including cost per use calculator.
- Collaboration space – announcements regarding additions and changes to data in the system and the ability to add notes and documents to subscriptions and licences.
Organisations, Profiles and Memberships

- Users gain access to KB+ through their association with an institution, for example a university, that has joined KB+. They can use their institutional login details to login to KB+.

- There are two types of members:
  - **Editor** members can edit all aspects of institutional accounts, create, amend, delete subscriptions and licences and approve other membership requests, and
  - **Read only** members can view all aspects of institutional accounts but cannot create, amend or delete any data.

- Every institution that has joined KB+ is added as an **Organisation** to the system. The details of this organisation can be completed and updated by **Editor** members of the organisation.

- Each user has a **Profile** that they should complete. Once this is done, they can request membership of their organisation in KB+. There is no limit to the number of users that can join an institution in KB+.

Subscriptions, Packages and Titles

Organisations that have joined KB+ can manage their e-resources in the form of **Titles** and **Packages** (which are groups of titles). Each of these collections is called a **Subscription**.

A subscription could include one or more titles or packages, or a combination of titles and packages, as selected by the Editor members of an organisation. It is also possible to have a subscription with zero titles.

Titles that are included in one of your subscriptions are referred to as **Issue Entitlements**.

Each subscription is associated with a licence (see below).

**KB+** enables you to:

- view the usage statistics of your subscriptions and titles
- compare subscriptions and packages
- attach relevant notes and documents to subscriptions
- keep track of subscription start, end and renewal dates;
- view and approve (or reject) pending changes to subscriptions
- work offline by using KB+ subscription worksheets

Licences

Each subscription can be associated with a **Licence**. The licence controls the terms and conditions associated with a subscription, for example how long you are entitled to receive a subscription and other properties associated with a subscription such as who can access the content it includes and via which media.

Editor members create licences using the existing Jisc Collections Agreements templates or from a blank template.

**KB+** provides tools for comparing the properties of your licences, and for exporting their details to a file.
Finance

KB+ includes a Finance module. This module enables you to view, track and break down the costs of your subscriptions.

Costs are based on Cost Items. A cost item represents an amount of money (a cost) arising from a subscription, a subscribed package, or an issue entitlement.

These financial details can be exported to a file.

Logging In

Go to:
https://www.kbplus.ac.uk/kbplus7/

You will then see the following page:
Click on Knowledge Base+ Member Login (1) to open the following:

If you have logged in from the device before, the name and logo of that organisation (or organisations) you logged in as a part of will be displayed (1). Simply click on the organisation to continue (if you don’t want an organisation to appear like this on the page again, click remove x under its logo (2)).

Otherwise, in the field provided, start typing the name of your organisation. As you type, a list of organisations with names matching what you have typed so far will pop-up. Pick the name of your organisation. It will then be displayed in the field.

Alternately, you can click Let me choose from a list (3). A list of all the organisations is then displayed. Pick the name of your organisation.

Once you have selected the name of your organisation, click Continue (4).
The *Login* page is displayed:

Enter your UK Federation username and password in the fields provided and click *Login*. Assuming you have entered the correct details, the KB+ Dashboard is then displayed.
The KB+ Dashboard

Note that when the KB+ Dashboard first opens after you log in, if your browser window is narrower than the minimum optimal width required for KB+ functionality, you will see the following message:

Please be aware that your browser window is smaller than the minimum size required for using KB+ (1024 pixels across and smaller). KB+ will work on your screen, but some advanced editing functions will be unavailable.

Once you have logged in, your KB+ Dashboard will be displayed.
Dashboard Overview

Across the top of the Dashboard is a menu of three buttons. The *Profile* and *Organisation* buttons (1) and (2) provide access to details of your profile and organisation. Details of your profile can also be accessed from the *Profile* menu (see below).

The third button (3) *Log Out* is used to log out from KB+.

The *Dashboard* button (4) returns KB+ to the Dashboard from wherever you are in the system.

Below the *Dashboard* button there is a button (5) for each “module” of KB+, e.g. Licences, Subscriptions, Titles, Packages, Finance, and Profile. These are used to open menus from which the facilities of the module in question can be accessed.
For example, the Licences button opens the following menu:

![Licences menu](image)

The main area of the Dashboard (6) consists of several panels. These panels provide information and messages regarding your titles, subscriptions, licences, etc with links to highlighted information such as recently edited items and upcoming renewals.

Use the Search your account option to search your account for any item (title, licence, subscription etc.). See below for details.

Also included are buttons to access other KB+’s functionalities KB+ (i.e. for adding, comparing, and exporting). These options are also available from the menus accessible to the left of the Dashboard (see (5) above).

For details of these menus and options, refer to the appropriate guide.
In the bottom-right corner of the Dashboard, the green Support button (7) opens a form which you can use to send a support request message to us.

Searching your Account

It is possible to search your licences, subscriptions, titles and packages available from the side menu. These can only be used to search for the particular type of item (e.g. a package) in question.

To search through any of these items, and through platforms, organisations, and actions, use the Search your account facility. This is located on the Dashboard:
Enter the name of an item in the field provided.

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 things called *Cambridge* it would not be sufficient to enter *cambr*
- If you enter more than one word, the search will return matches for either word, not both of them. For example, if you entered *Cambridge University* the search would return items with either *Cambridge* or *University* in their names
- To search for a phrase, enter it in quotations, for example “*Cambridge University*”. The search will then look for matches to that exact phrase
- The search is not case sensitive. searching against “*Cambridge University*” and “*cambridge university*” will return the same results

After entering the terms of your search, press “Enter”. The *Search Results* page is then displayed:

The results of your search are displayed in tabs (1), one for each type of searchable item (subscriptions, licences, etc.). The number of results that the search found for an item type is displayed next to the tab name.
Click on a tab to view the search results for that type of item. For example:

![Search Results](image)

To view details of an item, click on its name in the search results. This will take you to the details page of the item in question. Refer to the appropriate guide for details.

To carry out another search, enter the search criteria in the field above the search results and click the Search button. The search will work the same way whether it is carried out in the Search Results page or from the Dashboard.