Glossary

Introduction

This glossary defines the terms and the concepts you will need to understand when using KB+.

Term and concepts that are **bold** in a glossary entry have their own entry elsewhere in the glossary.

Definitions are listed in alphabetical order.

**KB+ Terms and Concepts**

**Agreement term**

This is the period of time that a subscription agreement is active. Typically **agreement terms** are one year, but agreements that last several years are also common.

In the KB+ application the agreement term is represented by the **subscription** or **licence** start and end dates.

**Auto**

The **subscriptions** set to **Auto** will have pending changes accepted automatically (see **Manual**).

**Content provider**

An **organisation**, such as a publisher, aggregator or subscriptions agent, who provides access to resources on a **subscription** basis.

In the KB+ application **content provider** is a **role** taken by an **organisation** in relation to a **package**.

**Core Status**

Titles can be given a **core status** in KB+. Some of this information is shared with JUSP.

Not Core – titles marked as ‘Not Core’ indicate that this title is not or hasn’t never had a **core status**.

Core – titles marked as ‘Core’ at the present date. You can run core titles usage report from JUSP for these titles.

Partial – titles with ‘Was/Will be Core’ status are not core at the present date but have had ‘Core’ status in the past or will have it in the future.

**Core title**

KB+ is integrated with Journal Usage Statistics Portal (JUSP), and provides facilities enabling users to mark which of their **issue entitlements** are JUSP **core titles** by setting the ranges of dates when they will be core.

The **core titles** marked in KB+ will appear in JUSP, from where users will be able to run reports for the publishers participating in JUSP (https://jusp.jisc.ac.uk/participants/). JUSP team will update the core titles on monthly basis, or as requested.
Cost item

Finances in KB+ are based on cost items. A cost item represents an amount of money, i.e. the price of a subscription, package, or issue entitlement. Cost items enable users to track payments, to view and break down costs (including costs-per-download), and produce financial reports in KB+.

Coverage

Coverage defines which part(s) of a serial publication is available as part of a package. Typically this is given in terms of a start date and an end date, although other indicators such as the earliest and latest volumes and issues available may also be used.

In KB+ the coverage information makes up part of a TIPP (see below).

Document

In KB+ a document is any file stored in KB+. Documents may be files of any format, including Word, Excel, PDF, XML or emails. You can add documents in your subscriptions and licences records.

Independent

The subscriptions set to Independent will not receive any pending changes (see Manual and Auto)

Issue entitlement

An issue entitlement represents an institution’s specific coverage for a TIPP. While a TIPP defines coverage, it does so for the generic package. Under the terms of the licence an institution may not have access to all TIPPs within a package, and it is the issue entitlement that indicates an institution’s actual access to resources under the package.

The issue entitlement does not repeat information from the TIPP that cannot change at a local level, such as the platform.

Each issue entitlement is linked to a TIPP which means that it is not possible to include in a subscription resources that are not in the original package(s).

An issue entitlement may be set to be a core title.

Licence

In KB+ a licence is the complete set of terms and conditions applying to a subscription. It is not limited to a single licence document, and may encompass terms or clarifications expressed elsewhere, such as in an email from the licensor.

A licence contains a set of licence key values, and can be linked to one or more documents.

A licence does not have an agreement term in KB+. While a licence document may include information about the agreement term, specifically the notice period, this information is recorded in the subscription.
Licence (Template)

A licence template is a licence which has been created by the KB+ team but has still to have the key values added. Licence templates can be easily identified as they have (Data to be added) at the end of the title.

Licence key properties

Licence key properties record simple answers to common questions related to licence terms and conditions. They represent only an interpretation of the licence, and are not a replacement for a detailed reading of the licence documentation.

Licensee

A licensee is an organisation who takes a licence in relation to a subscription.

In the KB+ application 'licensee' is a role taken by an organisation in relation to a licence.

Licensing consortium

A licensing consortium is an organisation that negotiates licensing on behalf of two or more licensees.

In KB+, any organisation can be a licensing consortium, or belong to a licensing consortium.

Licensor

A licensor is an organisation who offers a licence in relation to a subscription.

In KB+ ‘licensor’ is a role taken by an organisation in relation to a licence.

Manual

The Subscriptions set to Manual will receive pending changes which can be accepted or rejected by clicking the appropriate button on the screen. (see Auto)

Negotiator

A negotiator is an organisation that negotiates licensing on behalf of a licensee.

In KB+, any organisation can be a negotiator.

Notice

A notice period is represented by the associated subscription notice period.

Organisation

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 members of the organisation with the role of Editor.

Users gain access to KB+ through their association with an organisation, for example a university, that has joined KB+. They use their institutional login details to login to KB+. There is no limit to the number of users that can join an institution in KB+. 
Organisations can also be content providers, licensors, etc.

**Package**

A package is the set of resources to which a subscription pertains. This typically will be a set of journal titles or e-books, with coverage information.

In the KB+ data model a package brings together a set of TIPPs.

While each TIPP is directly linked to one or more platforms, each package is also linked to a single ‘nominal’ platform for convenience.

A subscription can be related to one or more packages via a subscription package.

**Pending changes**

The KB+ pending changes facility notifies users of any changes made by the KB+ team to an issue entitlement, package, subscription or licence that is linked to their organisation’s account. They may then accept or reject those changes as required.

Whether or not pending changes notifications are received depends on the relationship settings specified for subscriptions and licences. By default (manual), such notifications will be received as above. However, the organisation may instead specify for a subscription or licence that all changes are automatically accepted, or that a subscription or licence is “independent”, meaning that they will not be affected by any changes the KB+ team makes.

**Platform**

An interface that administers or delivers the content, or provides a route to the content, to the user.

In KB+ the definition of a platform is that it relates to a specific ‘domain’. Each new domain represents a new KB+ platform.

A platform is related to a TIPP, and each TIPP must have at least a ‘host’ platform and associated URL. A TIPP can have one or more host or administrative platforms.

For convenience, each package in KB+ also has a ‘nominal’ platform.

**Renewal**

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

It also enables users to compare current packages with prospective subscription packages and 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 the renewed subscription is created it will have a new list of issue entitlements (i.e. the titles included in the subscription).

**Role (organisations)**

The relationship that an organisation has to a subscription or licence is referred to as their role.
Organisations may be assigned the following roles in relation to a subscription:

- Provider (content provider)
- Subscriber
- Subscription Agent
- Subscription Consortium

An organisation may also be the vendor of a subscription.

Organisations may be assigned the following roles in relation to a licence:

- Licensee
- Licensor
- Negotiator
- Licensing Consortium

Role (users)

When a user applies for membership of an organisation in KB+, they also request they be granted one of the following roles:

- **Editor** members can edit all aspects of the organisation’s 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.

Subscriber

An organisation which will access a set of resources via an agreement with a content provider.

In KB+ ‘subscriber’ is a role taken by an organisation in relation to a subscription.

Subscription

A subscription is an agreement or potential agreement between two actors, a subscriber and a content provider (typically an HEI and a publisher) to gain access to a set of resources, for a period of time, under specific conditions (set out in a licence and/or elsewhere), and usually at a specific cost.

A subscription can be governed by a set of terms and conditions expressed in a licence.

A subscription is linked to a set of issue entitlements which express the exact content available to a subscriber through the subscription. The set of issue entitlements can be part of one of several packages.

It is worth noting that a subscription can be linked to several packages but to only one licence.

Subscription agent

A subscription agent is an organisation that acts as an intermediary between the subscribers and content providers.
Subscription consortium

A subscription consortium is an organisation that negotiates subscriptions on behalf of two or more subscribers.

In the KB+ application any organisation can be a subscription consortium, or belong to a subscription consortium. For KB+ purposes ‘Jisc Collections’ is treated as a subscription consortium.

TIPP (Title Instance Package Platform)

A TIPP is a very specific term to KB+. It stands for ‘Title Instance Package Platform’. It represents a resource (e.g. a journal) plus coverage information (start and end date/volume/issue). A TIPP always refers to a block of continuous coverage for a resource.

The primary host platform is integral to the TIPP so if the same journal title, with the same coverage, is delivered through two platforms these are different TIPPs.

Each TIPP is linked to a title instance, which represents the resource (e.g. journal) to which the TIPP refers. A package consists of one or more TIPPs.

Title instance

A title instance represents a resource (e.g. journal or a database) which is part of the Knowledge Base. A title instance can have one or more identifiers associated with it (e.g. ISSN, DOI).

User

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

Each user has a profile that they should complete. Once this is done, they can request membership of their organisation in KB+ along with a selected role.

Vendor

An organisation, through which a subscription is taken, and to which a payment is made.

In the KB+ application ‘vendor’ is a role taken by an organisation in relation to a subscription.