Subscriptions

Introduction

KB+ can be used to record, track and manage all your e-resource subscriptions in one place. KB+ provides you a central record of your subscriptions and key information including:

- Titles and core titles
- Usage statistics from JUSP
- Licence information
- Attach relevant notes and documents
- Start, end and renewal dates

Note that any subscription orders placed via the Jisc Collections website are automatically added to your KB+ account by the KB+ team.

KB+ also includes renewal and comparison facilities for subscriptions (refer to the RENEWALS GUIDE and COMPARISONS GUIDE for details, and the ability to export subscription details to files of various format.

Viewing your Subscriptions

On the Subscriptions panel on your Dashboard you will see the number (1) of subscriptions you have:

![Subscriptions Panel](image)

Click on the Subscriptions heading (2). The Your subscriptions page is then displayed (see below).
Alternately, open the Subscriptions menu and click on the Your subscriptions option (3):

![Subscriptions menu]

The Your subscriptions page is then displayed (see below).

You can also access your subscriptions from the Recently edited Subscriptions panel on the Dashboard:

![Recently edited Subscriptions]

This panel lists your 5 most recently edited subscriptions. Click on the Recently edited Subscriptions heading (4) to open the Your subscriptions page.

You can also click on the names of the listed subscriptions (5). This will open the Subscriptions Details page for the subscription (see later in the guide for information on this page).
Below is an example of a *Your subscriptions* page:

By default, the page lists ten of your subscriptions at a time (you can change this number by editing your profile). To view more of your subscriptions, use the options at the bottom of the page:
Subscriptions can either be sorted in A-Z or Z-A order, or in ascending or descending order of start date, end date, or renewal date, as selected from the Sort By list (1). The subscriptions themselves are listed below (2).

By default, only subscriptions that are valid on the current date are listed. You can change this as described in Filtered Searches below.
Searching your Subscriptions

You can search and filter the list of subscriptions by using the filter search drop down in the Your subscriptions page as described below.

To carry out a quicker search, open the Subscriptions menu and enter the name of a subscription or subscriptions or part of their names in the search field (1):

The search results are then displayed in the Your subscriptions page as described below.

Filtered Searches

To search your subscriptions using the filter search drop down in the Your subscriptions page, enter the name of a subscription or subscriptions or part of their names in the search field (1).
By default, only subscriptions that are valid on the current date are listed. You can choose to search for subscriptions that were valid on a different date, and also to remove this filter. Specify the type of date you wish to search from the Date Filter Type list (2), either valid on, renewal date, or end date.

Next, enter the required date in YYYY-MM-DD format in the Valid On field (3). Alternately, click on the calendar icon next to the field. The Calendar pop-up is displayed:

Select the required date and click Confirm. The date is the displayed in the Valid On field (3).

If you do not want subscriptions to be filtered by date, delete the date in the field.

Click Search (4) to carry out your search. The search results are then displayed as described below.

To clear the search criteria and results and return the complete list of your subscriptions, click Reset (5).

**Search Results**

Search results are displayed in the Your subscriptions page. The results will include all subscriptions that have names that include the string of characters you entered in the search field, whether that's all of a name or part of it.

The search is not case sensitive. In other words, searching against "Cambridge“ and "cambridge“ will return the same results.
Viewing and Editing Subscription Details

The list of your subscriptions displays basic details of them such as name, duration, and associated licences and packages (1). Beneath these details, it displays the number of note and documents associated with it (2).

In panel to the right of these details, the status of the subscription is displayed (e.g. current, expired), whether pending changes have to be accepted manually or not, and buttons for editing and deleting the subscription (3) (see below for more details).

To view details of the associated licences and packages, click the arrow next to the subscription’s name (4). Details of the associated package(s) and licence(s) (if any) are then displayed below the basic subscription details (5).

To view full details of a package or licence, click on its name. This will take you to the details page of the item in question.

Below the licences and packages, buttons are displayed (6) for viewing additional details of the subscription, and for editing and deleting it.
Viewing more Details of a Subscription

To view further details of a subscription, either click on its name at the top of the panel or on the View All button (6) (see the image above).

The Subscription Details page for the subscription is then displayed:

This page can also be accessed from the Recently edited Subscriptions panel on the Dashboard, as described previously.

This page displays names and links to detail of associated licences and packages (1), its start and end date, number of related pending changes, and number of associated notes and documents (2). See below for details.

Click on the button in the Pending Changes panel (3) to view details of the pending changes. Refer to PENDING CHANGE/TO DOs GUIDE for details.

Facilities for viewing and removing licences, viewing, adding and removing packages, and adding notes and documents are described later in this guide.

The Titles tab (4) lists the titles that the subscription provides access to, and provides facilities for adding, editing and deleting them. The Details tab (5) displays additional details of documents and notes, subscription history details, financial details, and so on. See below for details of these tabs.
The Titles Tab

The *Titles* tab lists all the titles that your subscription entitles you to via the packages it is linked to.

Titles can either be sorted in A-Z order, Z-A order, earliest date order, or latest date order, as selected from the *Sort Subscription Titles by* list (1). The titles themselves are listed below (2).

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You can search and filter the list of titles by entering the name of a title or titles or part of their names in the search field (3).

- To only include titles in the search results that are part of a specific package, select the package from the *Package* list (4).
- You can choose to only search for titles that were part of the subscription at a selected date. Enter the date in the *As At* field (5) in YYYY-MM-DD format, or click on the calendar icon next to the field and pick a date from the *Calendar* pop-up (see above).
- Click *Search* (6) to carry out your search. The search results are then displayed below the search panel.
- To clear the search criteria and results and return the complete list of the subscription’s titles, click *Reset* (7).

The *Add Titles* button (8) is used to add titles to the subscription (see below).

The *Batch Task Selected Titles* button (9) is used to edit or delete a batch of selected titles (see below).
Title Details
The Titles tab displays for each title in the subscription its name, earliest and latest dates, ISSN and eISSN, any title history details, and any notes (1). Click on its name (2) to display the Issue Entitlements page for the title, as described below. This will display the Issue Entitlements page for the title, as described below.

To the right of the basic title details, the status of the title is displayed (3), and below that its core status (4), plus a link to change that status if required (refer to the USAGE STATISTICS and CORE TITLES for details).

On the right-hand side of the title details the Title URL link (5) will open the publication itself. Above this is a button (6) for removing a title from the subscription (also see below).

Adding Titles/Issue Entitlements to a Subscription
To add titles (issue entitlements) to a subscription, click the Add Titles button (1) on the Titles tab.
The following page, entitled with the subscription’s name, is then displayed:

Use the top panel of the page to enter search criteria for the titles you want to add (2), then click the Submit Query button (3).

The search results are then displayed in the lower panel (4) (by default, all of your issue entitlements via the subscription are initially displayed). Select the titles to be added by clicking their checkboxes (5) and then click the Add Selected Entitlements button (6).

The page then closes and the selected titles are added to your subscription.
Editing and Deleting Batches of Titles

To edit or delete a batch of selected subscription titles, first select the titles by ticking their checkboxes (1), for example:

Then click the **Batch Task Selected Titles** button (2). The *Batch Action Selected Titles* page is then displayed:

From the *Batch Action* list, select either Delete or Edit as required.
If you select Edit, additional fields are then displayed in which you can enter new values to be applied to all the selected titles:

![Batch Action Selected Titles](image)

Once you chosen the required action, and in the case of editing, specified the new values, click Apply. The Batch Action Selected Titles page is then closed and the changes applied to your list of subscription titles.
Viewing Issue Entitlements

To view full details of the issue entitlement to a title that the subscription provides, click on its name in the list of titles on the Titles tab. The Issue Entitlement page is then displayed:

The page displays details of the subscription that provides the issue entitlement to the title and related access details (1).

Below that, the left-hand panel (2) displays the name of the subscription, licence, ONIX-PL licence (where available), and title. Each of these is a link to further information:

- The Subscription link opens the Subscription Details page for the subscription (see above).
- The Licence link opens the Licence Details page for the subscription. Refer to the LICENCES GUIDE for details.
- The ONIX-PL Licence link opens the Licence Comparison Tool (ONIX-PL) page, which display details of the current licence and the Jisc Collections Model Licence. Refer to the LICENCES COMPARISON TOOLS GUIDE for details.
- The Title link opens the Title Details page for the subscription. Refer to the TITLES GUIDE for details.
Below these links, core and medium details are displayed, plus a link to change that status if required (refer to the USAGE STATISTICS and CORE TITLES GUIDES for details.

The panel to the right of these details (3) displays additional information on the title.

Further down the page, the information regarding the platforms and packages that the title has been provided by are listed.

<table>
<thead>
<tr>
<th>From Date</th>
<th>From Volume</th>
<th>From Issue</th>
<th>To Date</th>
<th>To Volume</th>
<th>To Issue</th>
<th>Coverage Depth</th>
<th>Platform</th>
<th>Package</th>
<th>See TIPP</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003-01-01</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>fulltext</td>
<td>Brill Online Books and Journals</td>
<td>BrillNBSU2012</td>
<td>See TIPP</td>
</tr>
<tr>
<td>2003-01-01</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>fulltext</td>
<td>Brill Online Books and Journals</td>
<td>BrillMaster2012</td>
<td>See TIPP</td>
</tr>
<tr>
<td>2003-01-01</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>fulltext</td>
<td>Brill Online Books and Journals</td>
<td>BrillNBSU2013</td>
<td>See TIPP</td>
</tr>
<tr>
<td>2003-01-01</td>
<td>53</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>fulltext</td>
<td>Brill Online Books and Journals</td>
<td>BrillMaster</td>
<td>See TIPP</td>
</tr>
<tr>
<td>2003-09-01</td>
<td>53</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>fulltext</td>
<td>Brill Online Books and Journals</td>
<td>BrillSHELDNBSU2014</td>
<td>See TIPP</td>
</tr>
</tbody>
</table>

Click on the name of a platform in the Platform column (4) to view the details of that platform (see below).

Click on the name of a package in the Package column (5) to view the details of that package and on a See TIPP link (6) for the associated TIPP details. Refer to the PACKAGES GUIDE for details.

At the bottom the Issue Entitlement page, the default values in the associated package are displayed.

These values will be “Inherited” by the entitlement (see (1) above) but may be edited as described below.

Hover the cursor over the symbol in the Coverage Note column (7) to view the text of a note (if there is one). For example:
Viewing Platform Details

Details of a platform can be viewed by clicking a Platform link on the Issue Entitlement page (see above). This displays the Platform Details page for the selected platform:

General details of the platform are displayed at the top of the page (1).
Below this, the packages provided by the platform and their basic details are listed (2).
To view further details of a package click on its name (3) to open the Package Details page (refer to the PACKAGES GUIDE).
To view the list of titles in the package, click the arrow button next to the package title (4). The titles are then displayed like so:

Basic details of the titles are displayed, along with links to their Title Details (5) and TIPP Details (6) pages. Refer to the TITLES GUIDE and to the PACKAGES GUIDE for details.

**Editing Issue Entitlements**

To edit details of an issue entitlement in a subscription, including those inherited from the package, click the *Edit* button (1) at the top of the *Issue Entitlement* page.
The *Edit Issue Entitlement for (Title Name) via: (Subscription Name) page* is then displayed:

![Edit Issue Entitlement for Animal Biology via Subscription: Brill 2018](image)

Edit (or enter) the details as required and then click the *Update* button (2) to save these changes and exit the page.

**Deleting Titles from a Subscription**

To delete a title (issue entitlement) from a subscription, click the button next to it in the list on the *Subscription Details page*. A message such as following will then be displayed:

![Are you sure you wish to delete this entitlement](image)
Click OK to complete the removal.

**The Details Tab**

The *Details tab* displays are lists of notes (1) and documents (2), associated with the subscription along with facilities for adding, viewing in full, editing, and deleting them. See below for more information on these facilities.

The *Change History panel* (3) displays the number of changes and pending changes made by the KB+ team to the subscription. Click on the button to view details of these changes (see below for more information).

The *Edit History panel* (4) displays the number of edits you have made to the subscription properties. Click on the button to view details of these changes (see below for more information).

The *Previous Titles panel* (5) and *Expected Titles panel* (6) display the number of titles that are no longer part of the subscription, and the number of titles expected to be added to it. Click the button in these panels to open a page displaying lists of these titles (see below for more information).

The link in the *Renewals panel* (7) is used to start the renewals process for a subscription. Refer to the RENEWALS GUIDE for details.

The *Relationship panel* (8) indicates whether pending changes have to be accepted manually or not.

Below these panels, the renewal reminder, cancellation allowance and nominal platform of the subscription are displayed (9).
At the bottom the Details tab, under Financials, the financial details for the subscription are displayed:

<table>
<thead>
<tr>
<th>Financials</th>
<th>Organisation Links</th>
<th>Subscription ID</th>
<th>Organisations granted permissions from this licence</th>
<th>Cost per use</th>
</tr>
</thead>
<tbody>
<tr>
<td>CL</td>
<td>Order #</td>
<td>Start Date</td>
<td>End Date</td>
<td>Amount</td>
</tr>
<tr>
<td>2</td>
<td>2017-01-01 00:00:00.0</td>
<td>2017-10-17 00:00:00.0</td>
<td>25.0</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>P0600</td>
<td>2018-01-01 00:00:00.0</td>
<td>2018-12-31 00:00:00.0</td>
<td>-120.0</td>
</tr>
</tbody>
</table>

Click on the headings of the other tabs to view them:

- Organisation Links (see below);
- Subscription ID (see below);
- Organisations granted permissions from this licence; and
- Cost per use - refer to the FINANCE GUIDE for details).

Adding, Viewing, Editing, and Deleting Notes

The number of notes associated with a subscription is displayed in the Notes panel at the top of the Subscription Details page. The notes themselves are displayed in the Notes panel on the Detail tab of that page (see above).

- To add a new note, click this button in either of the Notes panels described above. The Create New Note page is then displayed:

  **Create New Note**

  Title

  Note

  Creator

  ![Save](save_icon)

  Enter the title, the note itself and the creator (i.e. your name or reference) in the fields provided and click Save. The Create New Note page then closes and your new note is added to the list in the Notes panel.
To fully view notes and their details, click the button in the Notes panel on the Details tab. The Notes page is then displayed:

<table>
<thead>
<tr>
<th>Title</th>
<th>Detail</th>
<th>Creator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note A</td>
<td>Please refer to document ABC123</td>
<td></td>
</tr>
<tr>
<td>Example Note</td>
<td>Example Note Text</td>
<td>A.N. Author</td>
</tr>
</tbody>
</table>

To edit a note, click the button next to it in the list in the Notes panel on the Details tab. The Edit Note page is then displayed:

Change the details of the note as required and click Save.

To delete a note, click the button next to it in the list in the Notes panel on the Details tab. The following message will then be displayed:

Click OK to complete the deletion.
Adding, Viewing, Editing, and Deleting Documents

The number of documents associated with a subscription is displayed in the Documents panel at the top of the Subscription Details page. The documents themselves are listed in the Documents panel on the Details tab of that page (see above).

- To associate a document with the subscription, click this button. The Create Document page is then displayed:

  Enter the document name and the creator (i.e. your name or reference) in the fields provided. Select the document itself by clicking File (+). A file browser will then be displayed which you can use to locate and select the document file. The name of the selected file will then be displayed next to the button.

  Select the type of document (Licence, General, or Addendum) from the Document Type list. Click Save. The Create Document page then closes and the document is added to the list in the Documents panel.

- To open and/or save a document to a different location, click on the button next to it in the list in the Documents panel on the Details tab. The exact procedure from this point may vary depending on the
browser you are using, but you will then be given the option to open the file or save the file to a location of your choice. For example:

To edit the name, creator, and/or displayed link of a document, click the button next to it in the list. The Edit Document page is then displayed:

Change the details of the document as required and click Save. Note that changing the file name only changes the file name displayed with the details of the document in KB+. It does not change the file name of the document or the link to the document file.
To remove the association of a document with the subscription, click the button next to it in the list. The following message will then be displayed:

```
Are you sure you want to delete this Document?
```

Click OK to complete the removal.

**Viewing the Subscription Change History**

The Change History panel on the Details tab displays the number of changes and pending changes made by the KB+ team to the packages and titles in the subscription.

To view details of these changes, click on the button. A page listing the changes is then displayed, for example:

```
<table>
<thead>
<tr>
<th>Pending Change Description</th>
<th>Outcome</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information about title In Vitro Cellular &amp; Developmental Biology - Animal changed in package SpringerMaster, modelName was updated from &quot;JX&quot; to &quot;cell&quot; Model. Accept this change to make the same update to your issue entitlement</td>
<td>Accepted By Daymanta Patel (ID P011) on 2017-10-09 29</td>
<td>2017-10-09</td>
</tr>
<tr>
<td>Information about title In Vitro Cellular &amp; Developmental Biology - Animal changed in package SpringerMaster, modelName was updated from &quot;1995-12-31&quot; to &quot;2000-01-01&quot;. Accept this change to make the same update to your issue entitlement</td>
<td>Accepted By Daymanta Patel (ID P011) on 2017-10-09 29</td>
<td>2017-10-09</td>
</tr>
<tr>
<td>Information about title Theoretical Medicine was changed in package SpringerMaster, coverageNote was updated from &quot;now, Theoretical Medicine and Biophysics (2001-01-29)&quot; to &quot;now, Theoretical Medicine and Biophysics (1995-01-01)&quot;. Accept this change to make the same update to your issue entitlement</td>
<td>Accepted By Daymanta Patel (ID P011) on 2017-10-09 29</td>
<td>2017-10-09</td>
</tr>
</tbody>
</table>
```
Descriptions of all the changes are listed, along with the “outcome” (i.e. whether they are still pending, or have been accepted or rejected), and the date the change was made.

**Viewing the Subscription Edit History**

The *Edit History* panel on the *Details* tab displays the number of edits you have made to the subscription properties.

To view details of these edits, click on the button. A page listing the edits is then displayed, for example:

![Edit History Panel](image)

**Viewing Previous and Expected Titles**

The *Previous Titles* and *Expected Titles* panels on the *Details* tab display the number of titles that are no longer part of the subscription, and the number of titles expected to be added to it, based on their access and end dates.

![Previous and Expected Titles Panels](image)
Click the button in these panels to open a page displaying lists of these titles. For example:

![Brill 2018 - Expected Titles](image)

Click on the name of a title (1) to open the *Issue Entitlement page* of a title (see above).
Click on *Host Link* (2) to go the web page of that the title is hosted.

**Adding, Viewing, and Removing Linked Organisations**

The organisations linked with a subscription and their roles regarding the subscription are listed on the *Details* tab, under the *Organisation Links* heading:
To link other organisations, click *Add Organisation*. The *Add Organisation Link* page is then displayed:

The page lists the organisations (institutions) that joined KB+ under the *Org Name* heading (1). Scroll through this list to find the organisation to be added.

Alternately, search for the organisation using the *Search* field (2). Enter the name or the start of the organisation’s name. As you do so, the list of organisations will change to only show those organisations that start with the characters you have entered.

When you find the organisation to be added, click on its *Select* checkbox (3). A tick will then be displayed instead of the box.

If required, you can then find and select further organisations to be added in the same way.

Select the role that the organisation is to fulfil with regard to the subscription from the *Role* list (4): Provider, Subscriber, Subscription Agent, or Subscription Consortia.

Note that:

- A role can be shared by more than one organisation.
- If you have selected more than one organisation from the *Org Name* list, they will all be allocated this role.
- You can choose not to select a role.

Finally, click *Add Organisation* (5). The *Add Organisation Link* page then closes and the organisation(s) is added to the list under the *Organisation Links* heading.
To remove the link to an organisation, click the button next to it in the list. The following message will then be displayed:

Click OK to complete the removal.

**Viewing and Deleting Subscription Identifiers**

Subscription identifiers and related details are listed on the Details tab, under the Subscription ID heading:

Listed under this heading is the unique reference identifier of the subscription, plus any other identifiers added to the subscription (see Editing Basic Details below).

To delete an identifier, click its button (the reference identifier cannot be deleted).

**Viewing and Removing Associated Licences**

If the subscription is associated with a licence, its name and key properties (i.e. those that define how it can be accessed and distributed), are displayed in the Associated Licence panel at the top of the Subscription Details page.
To view full details of the licence, either click on its name or on the button. The Licence Details page is then displayed. Refer to theLicence Guide for details.

To remove the association between the subscription and the licence, click the button. The licence is then disassociated from the subscription.

Note that no confirmation message is displayed when the button is clicked; the deletion takes place immediately. Licences can be reallocated to subscriptions using the edit facility, as described below.

**Adding, Viewing and Removing Associated Packages**

The package or packages included in a subscription are listed in the Associated Packages panel at the top of theSubscription Details page.

To view full details of the package click on its name. The Package Details page is then displayed. Refer to thePackage Guide for details.
Adding a Package to a Subscription

To add a package to the subscription, click this button. The *Link Packages* page is then displayed:

![Image of the Link Packages page]

Note that you can also link packages with the subscriptions on the *Package Details* page. Refer to the PACKAGES GUIDE for details.

The list of all available packages is displayed in the lower part of the page (1). The *Current List* panel (2) lists the packages already associated with the subscription. Click on a package name (3) to open its *Package Details* page.

Use the facilities in the *Search All Packages* panel (4) to search and filter the list of available packages. Click the arrow button next to Filter Search (5) to display additional filtering options:

![Filter Search options]

In the list of available packages, click on a package name (6) to open its *Package Details* page. The number of titles included in a package is displayed under the *Titles* heading (7).

If all or most of the issue entitlements in a package are to be part of the subscription, click its *Link Package (With Entitlements)* button (8). This will add all the titles of the package to the subscription.
If only a few of a package’s issue entitlements are required by the subscription, click its Link Package (No Entitlements) button (9). This will link the package but will not transfer any titles automatically.

The Subscription Details page can then be used to “manually” add or remove issue entitlements as required. A confirmation message will be displayed when you click either of these buttons. For example:

![Confirmation message](image)

Click OK. The Link Packages page is then closed and the Subscription Details page displayed again. The selected package will now be listed in the Associated Packages panel as explained above.

Removing a Package from a Subscription

To remove a package from a subscription, click the button next to it in the Associated Packages panel of the Subscription Details page. The Unlink page is then displayed:

![Unlink page](image)

The page displays the name of the linked package (click on it to open its Package Details page), and the number of issue entitlements (IEs) it includes.

To delete the link between the subscription and package, click Confirm Delete. The following warning message is then displayed:
Click OK to confirm the deletion. The Unlink page is then closed and the Subscription Details page displayed again. The selected package will no longer be listed in its Associated Packages panel and this action will unlink the titles from the subscription.

**Editing Basic Subscription Details**

The basic details of subscriptions, such as the name, associated licence, start, end and renewals dates etc. are displayed on the Details tab of the Subscription Details page.

When you create a new subscription, some these basic details may not be completed or may be populated with default values.

To add these details, or to edit them for any subscription, click Actions (1) at the top of the Subscription Details page:

...and then click Edit on the menu that is then displayed:
A page displaying the current basic details of the subscription is then displayed:

Add or edit these details (1) as required.

You can also add and remove licence identifiers using this page. In the field at the bottom of the page (2), enter the identifier or the start of the identifier. As you do so, the list of identifiers will change to only show those that start with the characters you have entered.
For example:

Click on the identifier to be added, and then click Add Identifier (3). The identifier is then added to the subscription and listed on the page:

To remove an identifier from the subscription, click Delete Identifier (4). The identifier is then deleted.

To save the changes you have made to the subscription and to exit this page, click Save (5).
Adding New Subscriptions

There are two ways of creating new subscriptions:

- from “scratch” by entering all details into KB+ pages, and
- from a subscription worksheet, which you generate from KB+ with selected packages included, export as an XLS file, edit as required, and then reimport to create the new subscription complete with packages as titles.

Both of these methods are described below.

Creating a New Subscription from “Scratch”

To create a new subscription using this method, click Add (1) on the Subscriptions panel of your dashboard:

Alternatively, open the Subscriptions menu and click on the Add subscriptions option (2):
Or click the Actions button (3) at the top of the Your subscriptions, Subscription Details, and other subscription module pages, and select the Add option:

The Add a Subscription page is then displayed:

Enter the name of the new subscription in the Subscription Name field (1). A unique identifier for the new subscription is automatically generated and displayed in the Subscription Identifier page (2). You may edit this if necessary.

The start and end dates of the subscription default to the beginning and end of the current year. Change these if required by entering another date or by using the Calendar pop-up as described previously.

Click Submit (4) to create the new subscription.
The Subscription Details page for the new subscription is then displayed:

You can now add and edit details, including the adding the subscriptions packages and titles using the facilities described in Viewing and Editing Subscription Details above.

Creating a New Subscription from a Worksheet

To create a new subscription from a worksheet, open the Subscriptions menu and click on the Create subscription worksheet option (1):
The Create subscription worksheet page is then displayed:

The list of packages that you can add to the new subscription are listed below the search panel (2).

**Searching the List of Packages**

To search and filter this list, enter all or part of the name of a package in the search field provided (3).

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 American it would not be sufficient to enter America.
- The search matches search terms as a phrase, for example “American Chemical” will find the exact phrase contained within package names.
- The search is not case sensitive. In other words, searching against “American Chemical” and “american chemical” will return the same results.
To filter the search further, by consortium name, content provider, start year, end year, and/or type, click Filter (4). These additional options are then displayed:

<table>
<thead>
<tr>
<th>Filter Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consortium Name</td>
</tr>
<tr>
<td>Content Provider</td>
</tr>
<tr>
<td>Start Year</td>
</tr>
<tr>
<td>End Year</td>
</tr>
<tr>
<td>Type</td>
</tr>
</tbody>
</table>

Select an entry from one or more of these lists. Only packages that match the values you selected will be returned by the search.

Click the Search button (5) to initiate the search. The results are displayed below the search panel (2).

To clear the search criteria and results and return the complete list of packages, click Reset (6).

**Selecting Packages**

To view the full details of a package, click on its name in the list of packages (7). The Package Details page for the package is then displayed. Refer to the PACKAGES GUIDE for details.

To select a package for the new subscription, click its 📘 button in the Action column (8). Repeat this for all the packages to be included in the subscription.

The number and the names of the packages you have added are displayed in the Basket Items panel (9).

To empty the “basket” and start the process of adding packages again, click the Clear Basket button (10).

When you have selected all the required packages, click Create Subscription Sheet (11) to move to the next step of the process.

**Exporting and Editing the New Subscription Worksheet**

When you click the Create Subscription Sheet button (see above), you will be prompted to open or save an Excel file called NewSubscription.xls:
Open the file (or save it then open it). The worksheet will be populated with details of packages you selected. For example:

The titles of the selected packages will all be listed (1).

To the right of these, there will be a column for each package, shaded in green (2). Enter Y in this column if it is to be included in the subscription, otherwise enter N or leave blank.

Note that Y and N are case sensitive.

The rest of the fields and columns may be populated with values as required, except for core titles.

Note that dates must be entered in YYYY/MM/DD format.

Once the spreadsheet has been edited appropriately, it can be imported into KB+ to create the new subscription. The file must be saved as an .xls file.
Importing the New Subscription Worksheet

To import the worksheet and create the new subscription in KB+, open the Subscriptions menu and click the Import subscription worksheet option (1):

The Import Subscriptions Worksheet page is then displayed:

Click the Actions button (2) and then Upload Worksheet:
The *import Renewals Worksheet* page is then displayed:

![Import Subscription Worksheet](image)

Click *Find File* to browse of the new subscription .xls file you saved, then click *Upload*.

The details of the packages and titles as specified in the worksheet (3) will then appear on the *Import Subscriptions Worksheet* page. For example:

![Import Subscriptions Worksheet](image)

Click *Accept and Process* (4) to create the new subscription.
The Subscription Details page of the subscription will then be displayed:

You can now edit the details of this subscription (including giving it a proper name) as described in Viewing and Editing Subscription Details above.
Reviewing Pending Changes

The Pending Changes facility advises you of changes that have been carried out centrally by the KB+ team that affect the packages, titles, licences associated with your organisation’s account.

The number and a list of these changes is displayed next to the list of subscriptions (1) on the Your subscriptions page.

Click on a selected change to view details of that change (2) or click Review All (3) for more detailed list (also accessible from the Dashboard).

Exporting Details of a Subscription

To export the details of a subscription, access the Subscription Details page, for example by clicking on the title of the subscription (1) on the Your subscriptions page.
On the Subscription Details page, click Actions (2):

From the menu that is then displayed, click on the Export option:
The Choose Export Type page is then displayed:

Next, click on format (CSV, JSON, XML, etc.) that you wish the details to be exported in.

The exact procedure from this point may vary depending on the browser you are using, but you will then be given the option to open the file or save the file to a location of your choice. For example:

See LINK RESOLVER GUIDE for more details of the Resolver formats.