

How to use KB+ for renewing your subscriptions?

The purpose of a 'renewal' is to create a new Subscription based on an existing Subscription. The new Subscription Taken will have a new list of Issue Entitlements, which are linked to different TIPPs. However it is likely that the list of titles represented in the new Subscription will substantially or completely overlap with those present in the old Subscription.

The renewal process in KB+ is designed to enable the creation of the new Subscription, which preserves information from the old Subscription, including information about coverage and 'core' status. However, it is also flexible enough to allow this data to be edited as part of the renewal process, and where necessary accept defaults from a package (e.g. for a journal start date).

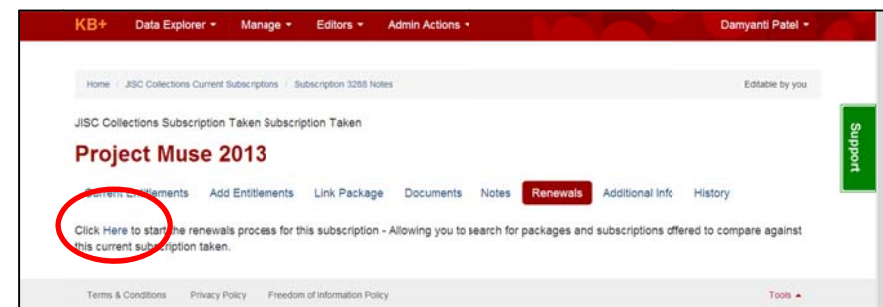
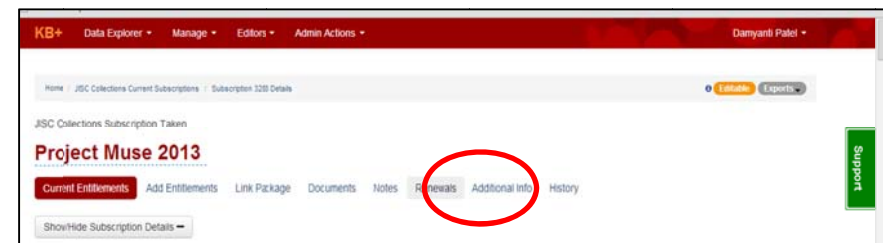
The process is made up of four parts:

1. Create a 'comparison basket' for the renewal
2. Export a spreadsheet based on the comparison basket, which will show details of the current subscription and renewal options
3. Edit the spreadsheet to represent the new Subscription
4. Import the spreadsheet to KB+ to create the new Subscription

1) Create a 'comparison basket' for the renewal

To start the renewals process, locate a subscription you wish to renew.

Go to Institutions>your institution>Subscriptions and select a subscription and click the 'Renewals' tab.

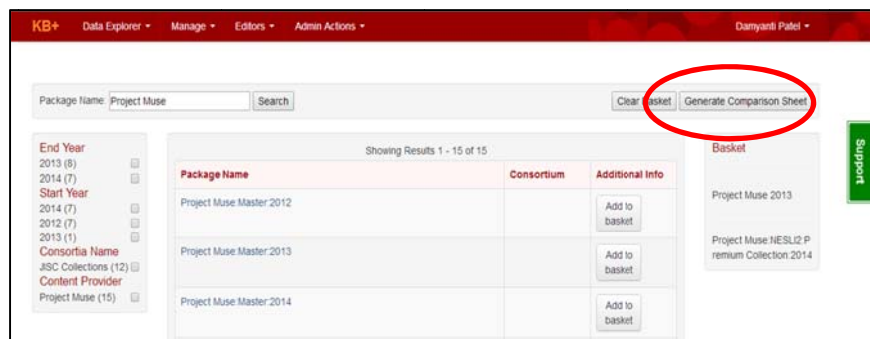


Click on the text '**Here**' to start the renewal process.

This will take you to the screen where you can search through packages on the system and build your 'comparison basket'.

The Basket should be populated with packages that would be potential candidates for renewing your existing subscription. For example, if you are working from a subscription of Project Muse, Humanities Collection 2013, the logical package to add to the basket is the Project Muse, Humanities Collection 2014.

You can search the packages by content provider. It is not currently possible to search for packages based on specific journal titles.



Once you have added the relevant packages to your basket, you can click 'Generate Comparison Sheet' to export a spreadsheet containing details of your current subscription and the candidate packages for renewal.

2) Export a spreadsheet based on the 'comparison basket'

You can use the Comparison Basket to create a Renewals Spreadsheet.

The spreadsheet will consist of information about the subscription you are going to renew, as well as information about each package you added to the Comparison Basket. The spreadsheet is colour-coded to make a quick visual comparison of packages easy.

The spreadsheet has the following columns:

- TitleID
- Title
- ISSN
- eISSN
- Current Start Date [format yyyy/mm/dd]
- Current End Date [format yyyy/mm/dd]
- Current Coverage depth
- Current Coverage note
- IsCore? [valid values: "Y" = Yes; "N" = No; "P" = Print; "E" = Electronic; "P+E" = Print+Electronic]
- Core Start Date [format yyyy/mm/dd]
- Core End Date [format yyyy/mm/dd]
- JUSP JR1 stats – per year recorded
- Current Sub – contains details of the current subscription as follows:

- Coloured **Light green** if the title is in the current subscription
- Coloured **Yellow** if the title has a 'core' status set in the current subscription

Key	Title In Subscription	Core Title	Not In Subscription	Current Su Candidates -> com.k_int.com.k_int.kbplus.Package.453										
Title ID	Title	ISSN	eISSN	current St	Current En	Current Co	Current C/IsCore?	Core Start	Core End	LJR1a2014	Project M	Project Muse	IESLJ2	Premium
6424	ASEAN Economic Bulletin	0217-4472	1793-2831	2003/01/01										
9881	AUDIEM. The International	2157-8583	2157-8591	2010/01/01			New for 2							
6501	Ab Imperio	2166-4072	2164-9731	2011/01/01										
6416	Advertising & Society Rev		1534-7311	2000/01/01										
6418	Africa Today	0001-9887	1527-1978	1999/01/01										
6417	Africa: Journal of the Inter	0001-9720	1750-0184	2006/01/01										
6502	African American Review	1062-4783	1945-6182	2009/01/01										
6503	African Conflict & Peace	2156-695X	2156-7263	2011/01/01										
6419	African Economic History	0145-2258	2163-9108	2008/01/01										
6420	African Studies Review	0002-0206	1555-2462	2005/01/01										
6504	Alabama Review	0002-4341		2007/01/01										

3) Edit the spreadsheet to represent a new 'Subscription'

This sheet needs editing to represent a 'renewal' and then importing back into KB+. The editing works as follows:

- Choose the Candidate package (Project Muse Humanities 2014) column you are going to use for the basis of the renewal.¹ Edit this column changing the value of the cell to either "Y" or "N".

¹ Currently it is only possible to create the renewal based on a single package, although it is planned to allow a single renewal to use multiple packages in the future.

the cell is marked with a "Y" it will be included in the new Subscription. If it is "N"(or blank) it will not be added to the new Subscription.

For each row you have marked with a "Y" you can also edit the columns:

- Current Start Date [format yyyy/mm/dd]
- Current End Date [format yyyy/mm/dd]
- IsCore? [valid values: "Y" = Yes; "N" = No; "P" = Print; "E" = Electronic; "P+E" = Print+Electronic]
- Core Start Date [format yyyy/mm/dd]
- Core End Date [format yyyy/mm/dd]

If these columns have a value in them, this value will be used to create the new subscription. If they are blank, default values from the package you chose to renew will be used. For example the current start date from the Project Muse Humanities 2014 will be the default.

Subscriber ID	Subscriber Name	Subscriber Shortcode	Current Su Candidates -> com.k_int.com.k_int.kbplus.Package.453											
Key	Title In Subscription	Core Title	Not In Subscription											
Title ID	Title	ISSN	eISSN	current St	Current En	Current Co	Current C/IsCore?	Core Start	Core End	LJR1a2014	Project M	Project Muse	IESLJ2	Premium
6424	ASEAN Economic Bulletin	0217-4472	1793-2831	2003/01/01										
1118	positions: east asia cultur	1067-9847	1527-8271	2000/01/01										
6396	symptome	1069-0697	1534-0627	1997/01/01										
6299	Eire-Ireland	0013-2683	1550-5162	2004/01/01										
6549	Milton Studies	0022-6860												

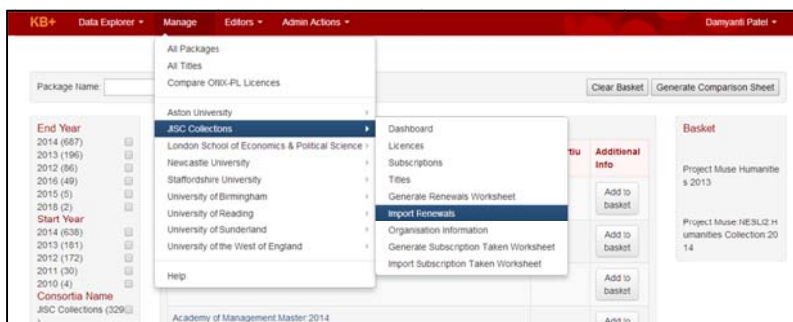
In this example, 3 of the current titles are to be included in the new subscription, one title is to be dropped, and two new titles to be added. The existing titles will keep their current start/end dates and core details. The new titles will take the default values from the package.

All details, as well as the list of titles in the subscription, can be edited once the subscription has been created in KB+.

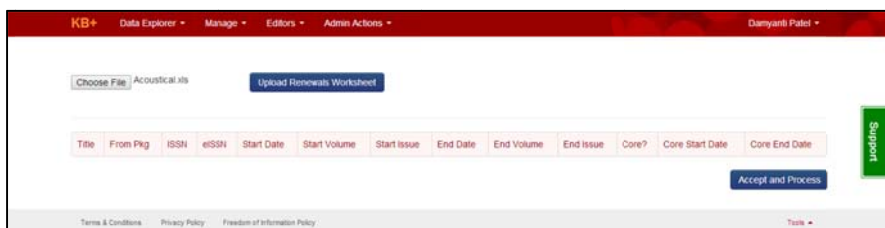
Once the spreadsheet has been edited appropriately, it can be imported into KB+ to create the new subscription.

4) Import the spreadsheet into KB+ to create a new subscription

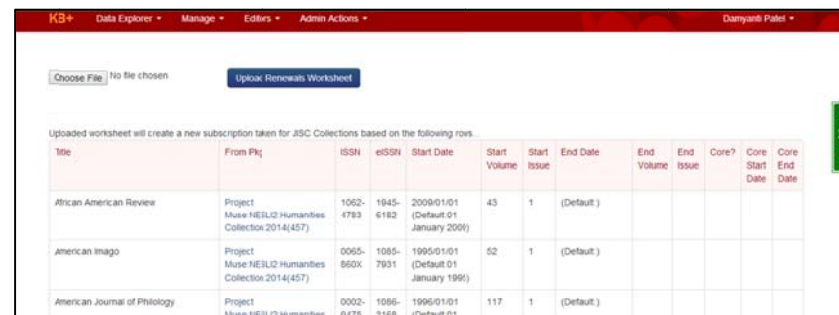
You can then import this into KB+ by going to Institutions>(your institution)>Import Renewals



Click on 'Choose File' and then click 'Upload Renewals Spreadsheet'



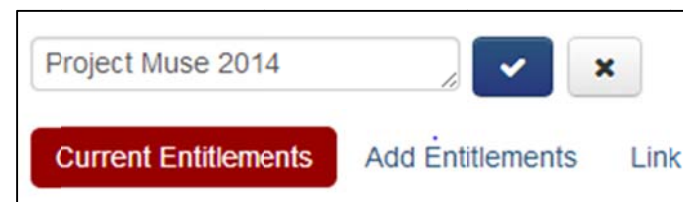
Once uploaded you will see the details on the screen. Scroll to the bottom of the page to click 'Accept and Process'



The screenshot shows the KB+ interface with the details of the uploaded spreadsheet. The table below shows the data for the uploaded spreadsheet.

Title	From Pkg	ISSN	eISSN	Start Date	Start Volume	Start Issue	End Date	End Volume	End Issue	Core?	Core Start Date	Core End Date
African American Review	Project Muse: NEEL2 Humanities Collection 2014(457)	1062-4793	1845-6182	2009/01/01 (Default 01 January 2009)	43	1	(Default)					
American Imago	Project Muse: NEEL2 Humanities Collection 2014(457)	0065-860X	1086-7931	1995/01/01 (Default 01 January 1995)	52	1	(Default)					
American Journal of Philology	Project Muse: NEEL2 Humanities Collection 2014(457)	0002-9475	1086-3169	1996/01/01 (Default 01 January 1996)	117	1	(Default)					

This will create a new subscription, you will then need to click on the title, edit the name and click the blue tick box



Requesting Support and Reporting issues

From any area of KB+ you can ask for help or report issues by clicking on the green 'Support' label on the right of the screen. This will open a form



where you can fill in details of any issue you have encountered using KB+, or make a request for support. Alternately, send us an email to kbplus@jisc-collections.ac.uk