Packages

Introduction

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

In the KB+ data model a package brings together a set of **TIPPs**. TIPP stands for ‘Title Instance Package Platform’. It essentially 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.

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

When setting up a subscription you can choose which packages to include. The subscription will then grant you **issue entitlements** to the titles in the selected packages.

The Packages module of KB+ enables you to view details of all available packages, including the titles they contain, as described below.

There is also a facility for comparing one package with another, to help you choose the packages you want. This is described in the **COMPARISON TOOLS GUIDE**.

Viewing List of Packages

On the **Packages** panel on your Dashboard you will see the number (1) of available packages:

Click on the **Packages** heading (2). The **All Packages** page is then displayed (see below).
Alternately, select open the Packages menu, then select the All packages option (3):

The All Packages page is then displayed:
By default, the page lists ten packages at a time (you can change this number by editing your profile). To view more packages, use the index at the bottom of the page:

Packages can either be sorted in A-Z or in Z-A order of package name or consortium name, as selected from the Sort Packages By list (1). The packages themselves are listed below (2).

The Compare button at the top of the page is used to access the package comparison facility. Refer to the COMPARISON TOOLS GUIDE for details.
Searching the Packages

You can search and filter the list of packages by using the filter search drop down in the All Packages page as described below.

To carry out a simpler search, open the Packages menu and enter the name of a package or packages or part of their names in the search field (1):

The search results are then displayed in the All Packages page.

Alternately, you can use the search facilities at the top of the All Packages page:

Enter the name of a package or packages, or part of their names, in the search field (2). Please note, that you will need to enter a full word and certain symbols as “:” (colon) will not be recognised.

If required, you can filter the results to only include packages associated with a specific consortium or content provider, or that have a specific start or end date (or a combination of these filters). Click Filter (3) to display the options (4), and then select the required filter condition(s) from these lists.
Click Search (5) to carry out your search. The search results are then displayed in the All Packages page in place of the full list of packages.

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

### Viewing Package Details

The All Packages page displays the following basic information for each listed package:

1. **Number of Titles**: The number of titles contained in the package.
2. **Start and End Dates**: The dates from which the package contains titles.
3. **Last Modified Date**: The last date the package was edited.
4. **Consortium**: Information about the associated consortium (if applicable).

For each package, the number of titles it contains, its start and end dates, the last date that it was edited on, and its associated consortium (if there is one) are displayed (1).

To view full details of a package, click on its title (2). This will open the Package Details page for the package:

1. **Expected Titles**: Information about titles expected in the package.
2. **Previous Titles**: A list of previous titles in the package.
3. **Package History**: Details of package transactions and events.
4. **TIP Access Information**: Information about the package's access details.
5. **Coverage Details**: Information about the coverage of the package.
The four panels in the top-left of the page (1) display the package’s start and end date, the numbers of package history events, titles expected to become part of the package, and titles that were previously in the package but are no longer included.

To view details of the package history, expected titles, and previous titles, click the button in the appropriate panel. See later in this guide for details.

The top right panel (2) is used to link the package to a subscription. See later in this guide for details of this procedure.

The Actions button (3) is used to access a menu that provides access to the package comparison facility (refer to the COMPARISON TOOLS GUIDE for details), and facilities for exporting package details (see later in this guide for details).

Below the panel, there are two tabs, Titles (4) and Details (5). See below for details of these tabs.

Note that if the package is past its end date, text explaining that the page is displaying a snapshot of the package as it was on that date is displayed under the package name (6).

**The Titles Tab**

The titles tab lists all the titles in the package, along with their platforms, coverage depth, dates and notes, and identifiers.
If required, you can search and filter this list. To access the facilities for this, click Filter (1). See later in this topic for details.

Clicking on the name of a title (2) will open the Title Details page for that title. Refer to the TITLES GUIDE for details.

To view the TIPP (Title Instance Package Platform) details of a title, click on its TIPP link (3). The TIPP Details page for the title is then displayed. See below for details.

To go to the platform web page of a title, click on its Platform link (4).

**Searching and Filtering the List of Titles**

To display the search and filtering facilities, click Filter (1). The following options are then displayed:

To filter by title name and/or by the text of a coverage note, enter the name or note text, or part of the name or note text, in the fields provided (5) and (6).

To filter the list of titles to display on those with coverage before and/or after a specified date, use the Coverage Starts Before and Coverage Starts After fields (7).

To specify a date, enter the required date in YYYY-MM-DD format. Alternatively, click on the calendar icon next to the field in question. The Calendar pop-up is then displayed:

Select the required date and click Confirm. The date is then displayed in the field.

Click Search (8) to carry out the search/filtering. The list of titles will then be restricted to those that match your specified criteria.
To clear the search criteria and results and return the complete list of titles in the package, click Reset (9).

**Viewing TIPP Details**

To view the TIPP (Title Instance Package Platform) details of a title, click on its TIPP link as described above. The TIPP Details page for the title is then displayed:

The *In* panel (1) displays the name of the package the title is in. Click on it to open the Package Details page (see above).

The *On* panel (2) displays the platform that the title is on. Click on it to open the Platform Details page. Refer to the SUBSCRIPTIONS GUIDE for more information.

Below these panels, many other TIPP properties and related information is displayed (3).
Hover your cursor over the symbol (4) in the Status panel to view the TIPP status of the title. For example:

![TIPP Status](image)

More TIPP details for the title are displayed further down the page:

![Additional Platforms](image)

If the title is located on other platforms, these platforms and associated details or displayed in the Additional Platforms panel (5).

The page also lists all the occurrences of the title on other platforms and in other packages (6). The platform and package links open the Platform Details and Package Details pages as described above.

If required, you can filter this list of occurrences. Click Filter Titles Search (7) to display the facilities for this:

![Filter Titles Search](image)

You can filter by package name and / or by start and end dates.
The Details Tab

The *Details* tab displays further details of the package in top-left panel (1):

1. **Notes panel**: Notes associated with the package are displayed in the *Notes* panel (2). Click on the page button to view the notes in a more convenient format, i.e. on a page of their own.

2. **Documents panel**: Documents associated with the package are displayed in the *Documents* panel (3). Click on a document title to open that document.

3. **Organisation Links**: The organisations linked with a package and their roles regarding the package are listed under the *Organisation Links* heading.

4. **Other Identifiers**: Other identifiers associated with the packages are listed under the *Other Identifiers* heading (5):
Viewing a Package History

To view the history of a package, i.e. what changes the KB+ team has made to it, click on the button (1) in the Package History panel of the Package Details page:

![Package History panel](image)

The Package history page is then displayed:

![Package history page](image)

The page displays all the events that comprise the history of the package in KB+.

The links in the Name column (2) will open either the Package Details page or the TIPP Details page (see above), depending about the event.

Viewing Previous and Expected Titles

Titles are added to packages at the start their coverage date ranges. They will be removed from packages only if their content is removed from the content provider platform. If the title moves to another content provider but the content remain on the original platform an end date will be added.

To view details of any titles that are expected to become part of the package, or titles that were previously in the package but are no longer, click on the button (1) in either the Expected Titles panel or the Previous Titles panel of the Package Details page, as appropriate:

![Expected Titles panel](image)

![Previous Titles panel](image)
A page is then displayed on which the expected or previous titles are listed. For example:

![Image of a list of titles]

Clicking a name of a title will open the Title Details page for the title. Refer to the TITLES GUIDE for details. Clicking on a TIPP link will open the TIPP Details page for the title. See above for details of this page.

**Linking a Package with a Subscription**

To link a package to one of your existing subscriptions, use the Link this package to a subscription panel on the Package Details page:

![Image of the Link this package to a subscription panel]

First, select the required subscription from the Your Subscriptions list (1).

If all or most of the issue entitlements in the package are to be part of the subscription, tick the With Entitlements (2) checkbox. If only a few of the package’s issue entitlements are required by the subscription, leave the
checkbox blank. The Subscription Details page can then be used to “manually” add or remove issue entitlements as required. Refer to SUBSCRIPTIONS GUIDE for details.

Finally, click Submit (3) to link the package and the selected subscription.

Note that you can also link packages and subscriptions via the Subscription Details page.

Exporting Details of a Package

You can export the details of a package to files in CSV, XML, JSON, and KBART II (TSV) formats.

To do this, open the Package Details page of the package (see above for details), click on the Actions button (1), and select the Export option from the menu that is then displayed:

The Choose Export Type page is then displayed:

Next, click on format (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: