Cambridge Core

Librarian Account userguide

- Update your organisation details
- Download bibliographic data
- Manage content requests & view holdings
- Access usage statistics
- Set up self service for ebooks

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Cambridge Core

Cambridge Core is the new academic platform from Cambridge University Press. This user guide provides account administrators with a step-by-step guide to managing your institutional account.

Cambridge Core is available at **cambridge.org/core**

Accessing your administrator account

1 From the Cambridge Core homepage, select the blue log in button on the top right of the page and log in as an account administrator using your email address and password. If you have any problems logging in please visit **cambridge.org/core/help**

- Log in requirements
- **Email:** Enter the email address your administrator account is registered to *(e.g. test@exampleuniversity.org)*
- **Password:** type in your password *(password is case-sensitive)*

2 After logging-in, click on the blue **My account** button on the top right of the page

3 From the organisation account page, you will find options to:

- Review access and authentication methods
- Manage your account settings
- Retrieve bibliographic data (MARC, KBART)
- View your content holdings
- View content requests
- Marketing support
- Retrive usage statistics
- Find user guides and training
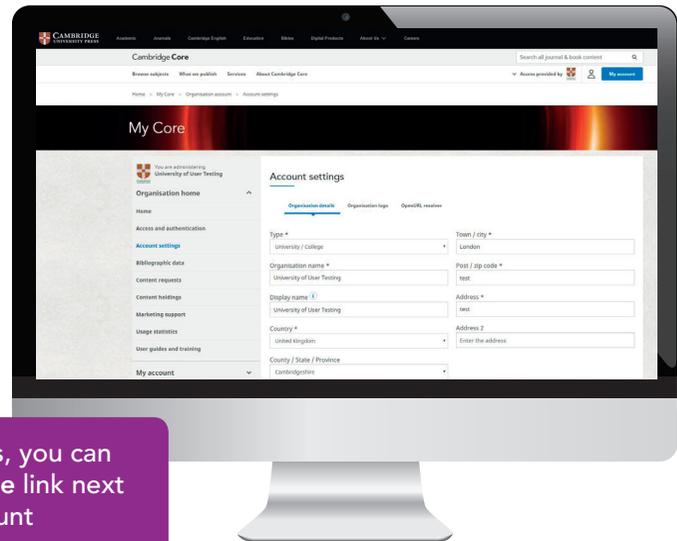
If you are an administrator of multiple organisations, you can easily switch between them by selecting the **Change** link next to **You are administering** in your organisation account

Consortium administrators can also view a list of organisations within their consortium

Updating your organisation details

1 In the 'Account settings' page you can **check and update your address and display name**, **upload an organisation logo** and **configure OpenURL**

Upload an organisation logo

1 On the organisation account page, select **Account settings**

2 In **Account settings**, select the **Organisation logo** tab

Cambridge **Core**
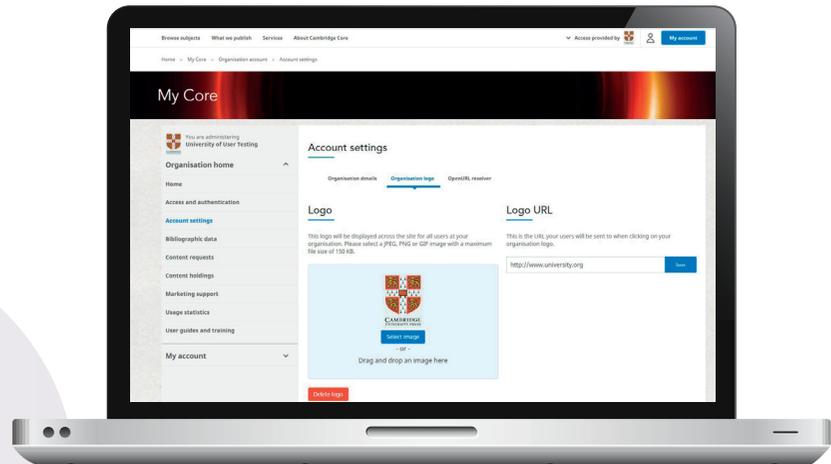
Account Settings

3 Upload an image for your organisation logo:

- **By folder location**
- Click the **Select image** button
- Select the folder location of your image file

- **By drag and drop**
- From your folder choose the image file you wanted to upload
- Drag and drop it into the image area

4 After the successful upload of your organisation logo, the **Delete logo** button will become visible. If necessary, you can use this to delete your logo

5 By default, if no image has been uploaded then a placeholder will appear using the first letter of the organisation name

U

6 You can also define a logo URL by providing a URL link in the text box and selecting **Save**. If a URL is provided, your organisation logo will link through to that URL

✓ Accepted image types are JPEG, PNG and GIF

✓ File size should not be greater than 150 KB

✓ If your image does not meet these requirements an error message will display

Configure OpenURL

1 On the organisation account page, select **Account settings**

2 In **Account settings**, select **OpenURL resolver**

3 Enter your library's link resolver base URL
- Example: http://example.search.serialssolutions.com

4 You can modify how OpenURL links display to your organisation users, either by using custom text or by uploading an image. The image must be in either JPEG, PNG or GIF format and be no larger than 150kb

Tip: Text should not exceed 60 characters

Cambridge **Core**
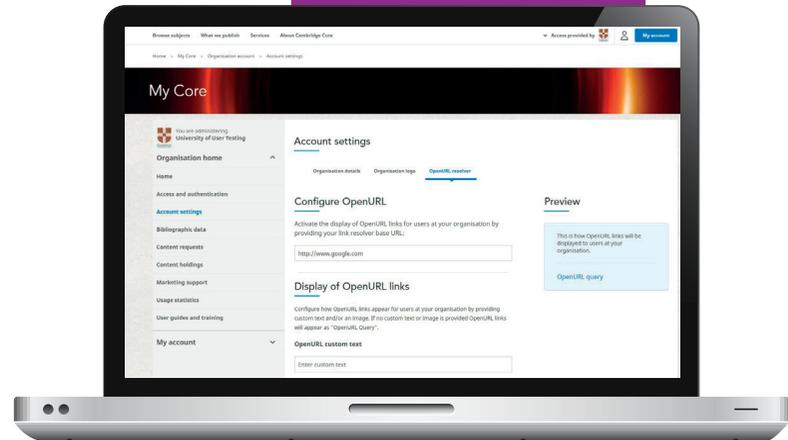
Account Settings

5 If no custom text or image is provided, the default display for the OpenURL link will be the text **OpenURL Query**

6 You can preview how **OpenURL** links will appear in the window on the right-hand side of the **OpenURL resolver** page
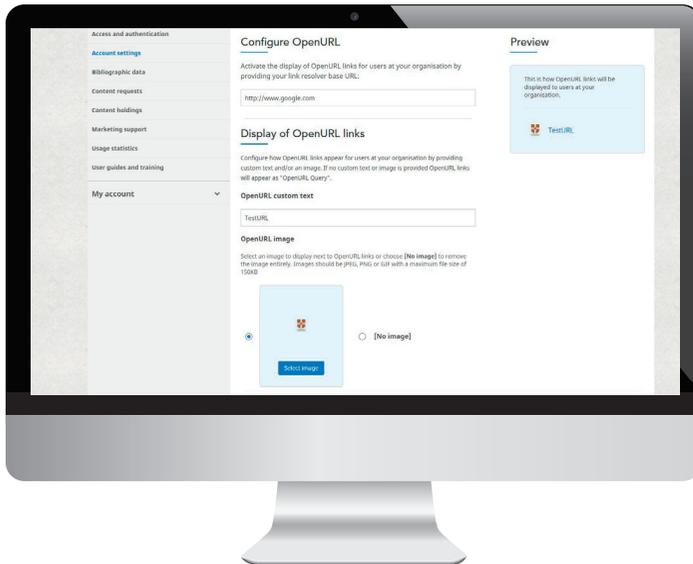
7 To update the OpenURL settings, just remove/overwrite the existing OpenURL, as well as the Open URL custom text or upload a new image and select **Save**

Download MARC records, OCLC control numbers & KBART lists

1 On the Organisation account page, select **Bibliographic data**

2 Choose the desired record format:
- MARC records
- OCLC control numbers
- KBART title lists

3 You can select the records you want to download using the following options:
- **By organisation** – This can be a an organisation or consortium
- **By order ID** – using an order reference number
- **By ISBN** – International Standard Book Number
- **By ISSN** – International Standard Serial Number *(this applies to KBART records only)*
- **By package** – Download records for specific groups of titles in packages you have purchased

Bibliographic Data

4 Next, you can specify the date range of the records you want to download based on the book's online publication date *(for MARC and OCLC control numbers only)*

5 Click **Download**

6 Additional details:

You can find further details about what to expect from the different download types below

- **File extensions of the downloaded file:**
- MARC Records (.mrc file)
- OCLC (.txt file)
- KBART (.txt file)
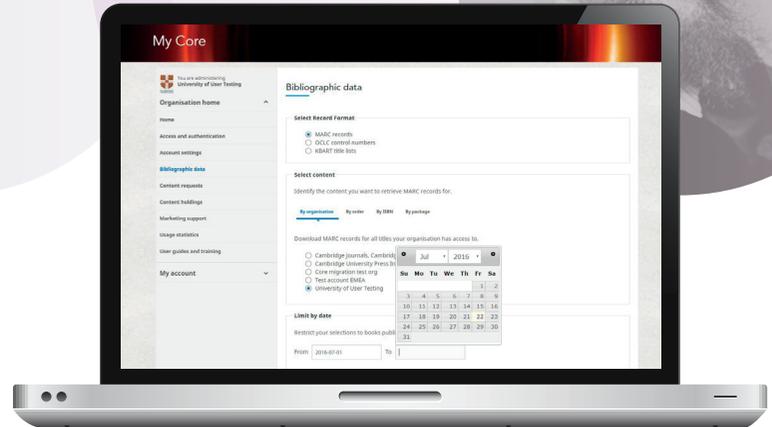
The Bibilographic data area of your account allows you to retrieve bibliographic data tailored to your institutional holdings. Publicly available records for all content on Cambridge Core can also be retrieved from the Services for librarians area

Content requests

The purpose of this page is to view the list of content that has been requested by the users in your organisation. This may help you identify content to purchase for your organisation

1 On the Organisation account page, select **Content requests**

2 Set **Content request notification**

  • Enable this option if you want to be notified by email when users at your organisation recommend content

3 On the **Content request** page you can view the list of requests recommended for purchase by the users at your organisation.

4 You can sort this list in ascending/descending order by:

  • Type
  • Title
  • Requests
  • Latest requests

Content Requests and Holdings

5 To view the details of each request, including who identity of the user who recommended, and any messages entered click **View details**

6 You also have the option to download this information by selecting **Download list**
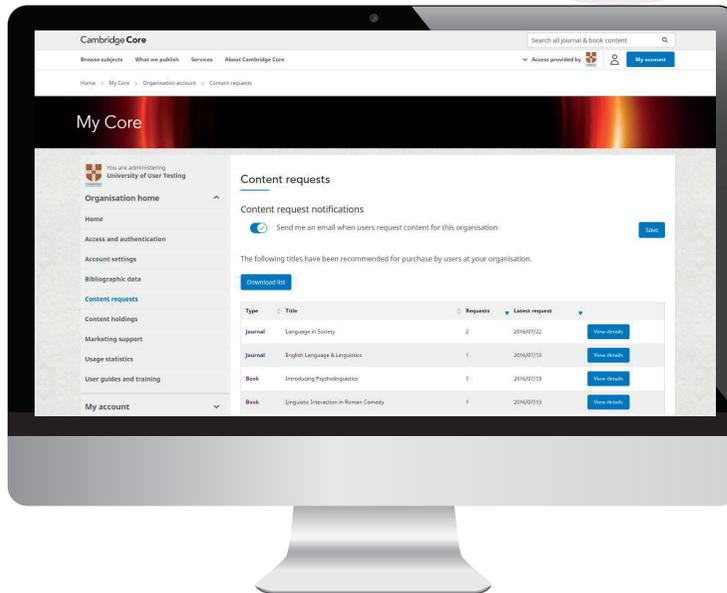
7 The downloaded file is in .csv format, and will contain the following information:

- Product type
- Title
- Link
- Request date
- Name
- Email
- Message (if applicable)

Content holding area

1 On the Organisation account page, select **Content holdings**

- **Journal subscriptions**

  – Click **Download** to get a list of your organisation's journal subscriptions in .csv format

  – File contains a list of all the journal subscriptions that your organisation has purchased (listing journals purchased and for which years)**

  – To activate journal subscriptions for your organisation enter the 10 digit subscription number without any spaces, and select **activate**
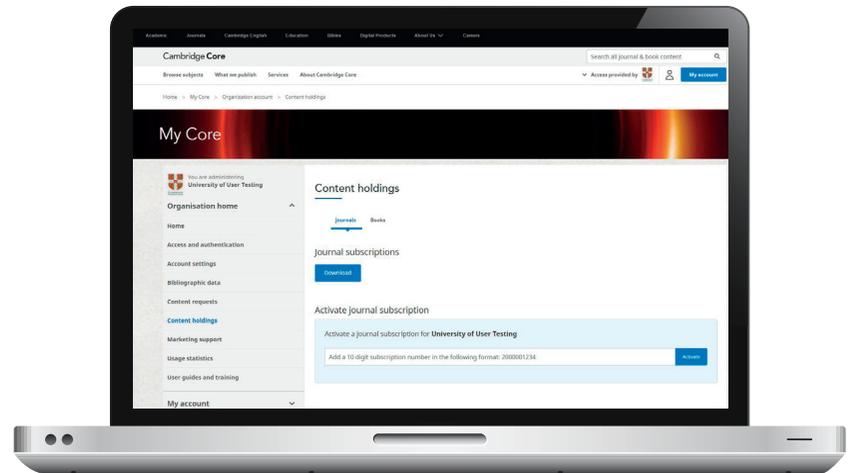
** Please note that this list does not include any additional content an organisation may have access to by virtue of holding an active subscription, or via trials or offers

Content Requests and Holdings

• Book holdings

– Click **Download** to get the list of your organisation's book holdings in .csv format**

– The downloaded file will include the online ISBN and the title
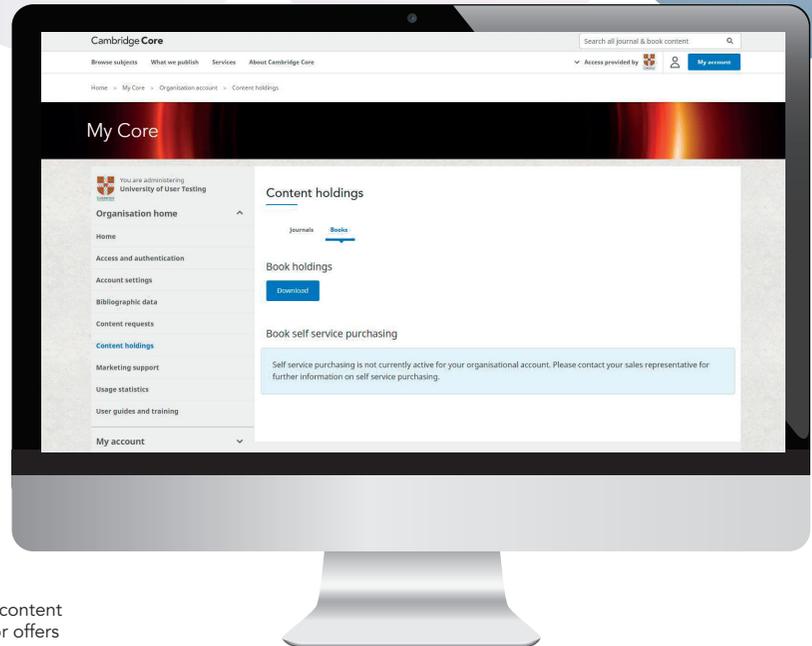
** Please note that the file only lists purchased or subscribed to content and does not include content you may have access to via trials or offers

Retrieving usage statistics

1 On the Organisation account page, select **Account settings**

2 In **Account settings**, select **Usage statistics**

3 Select reporting period (start and end date)

4 Select report type (see table on following page for options) and format (eg. csv)

5 Click **Download**

Cambridge **Core**
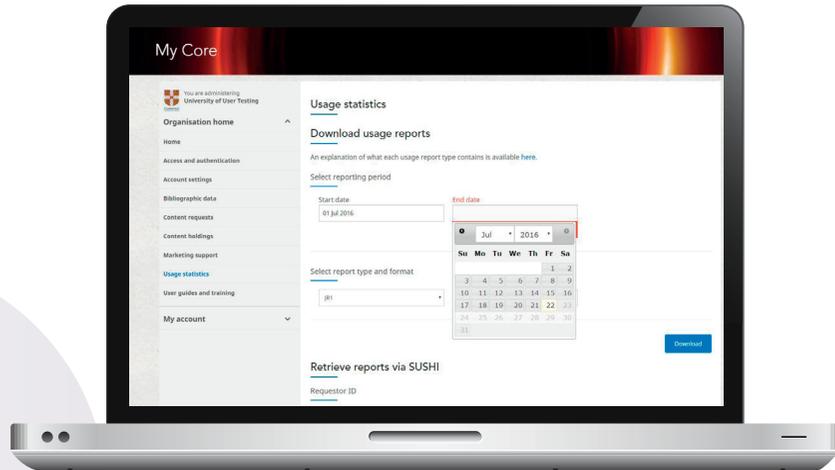
What do the report types mean?

JR1 – Journal Report 1
Number of successful full-text article requests by month and journal

JR1A – Journal Report 1a
Number of successful full-text article requests from an archive by month and journal

JR1GOA – Journal Report 1GOA
Number of successful Gold Open Access full-text article requests by month and journal

JR2 – Journal Report 2
Access denied to full-text articles by month, journal and category

JR5 – Journal Report 5
Number of successful full-text article requests by year-of-publication (yop) and journal

BR2 – Book Report 2
Number of successful section requests by month and title

BR3 – Book Report 3
Access denied to content items by month, title and category

PR1 – Platform Report 1
Total searches, result clicks and record views by month and platform

A CR1 Report, detailing consortium usage will also be available for consortium administrators

Important information
- Please note that COUNTER4 reports are only available for usage from the Cambridge Core launch date. The previous 5 years of usage data from Cambridge Books Online and Cambridge Journals Online will be available as separate reports (not as COUNTER4 reports)

Setting up librarian self service for ebooks

Please note that you will need to be logged in to Cambridge Core as an organisation administrator to use the self service functionality

1 In **My Account** select the **Content Holdings** page and select the **Books** tab

2 If you had access to the self service functionality on Cambridge Books Online, this option will be automatically migrated to Cambridge Core

3 If you did not previously have self service functionality on Cambridge Books Online, you will need to contact your sales representative to have this enabled for Cambridge Core or email **online@cambridge.org** (if based in the Americas) or **library.sales@cambridge.org** (for rest of the world)

4 Once self service has been enabled, the option to **Launch self service** will be available in the Books holdings tab. Click this button to launch self service mode
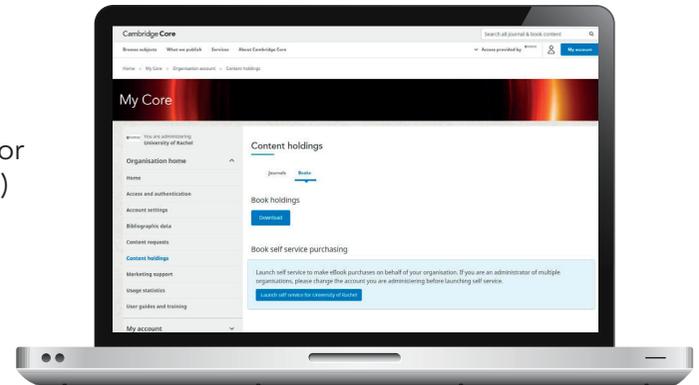
Books Self Service

5 When self service is launched, a shopping cart icon will display in the top right of your screen and a message will show on the page advising you that you are currently in self service mode

6 All items with a price displayed are available to purchase. Click the **Buy** for button to add an item into your shopping cart. Once added the status will change to **added to cart**. Please note that any discounts set up for an organisation will only be displayed in the shopping cart.
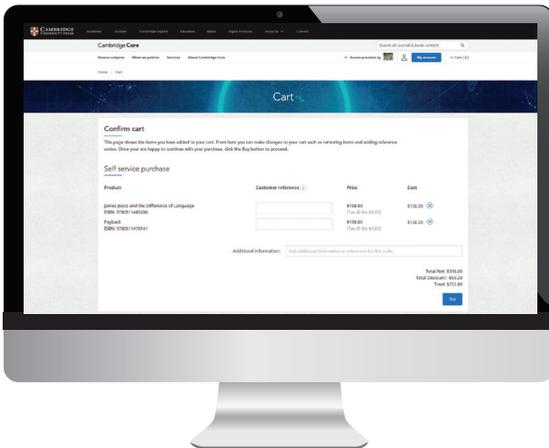
7 Click the shopping cart icon to review and confirm your purchase. Additional information such as reference codes (for your own internal records and budget allocations) can be added on the shopping cart page before you confirm your purchase

8 Select **Buy** and you will be taken to an order confirmation page where an order reference number will be displayed .Your organisation will get access to the ebook titles once the order has been processed. These titles will then appear in your book holdings.*

*Please note if you do not have immediate access to the available title(s) you have purchased, please try again later as it may take up to 2 hours for the activation process to complete.

What else can I do in the account administrator area?

Access and Authentication

Select **Access and Authentication** to:

- View authorised IPs and blocked IPs on the IP addresses tab

- Select the Athens tab or the Shibboleth tab to view any Athens or Shibboleth ID's that are currently associated to your account or to configure access for your institution

- Configuring Athens and Shibboleth access will enable users at your organisation to authenticate on Cambridge Core by single sign-on with your systems. If you have added a Shibboleth ID you can also generate a WAYFless URL to share with your users which will provide a faster Shibboleth authentication process

- View remote and expired users on the **Remote users** tab

Marketing support

- Select the **Marketing support** option to view existing resources for Cambridge Core, including downloadable posters, leaflets and electronic promotional items

- You can also use this page to request bespoke marketing support material for your institution
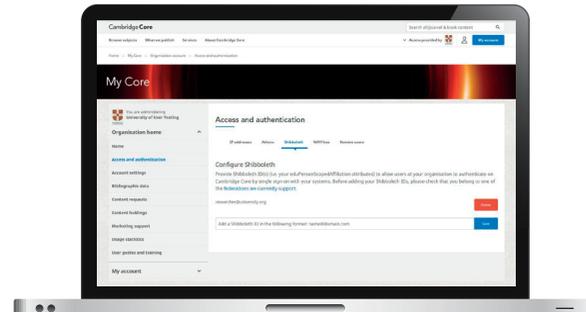
Did you know?
Cambridge Core also supports inbound OpenURL.
Our base URL is **https//www.cambridge.org/core/openurl**

Contact us

For further information please contact us using the details below or speak to your usual sales representative.

@ **Americas:** online@cambridge.org

@ **Asia:** asiamktg@cambridge.org

@ **Rest of world:** library.sales@cambridge.org

Find us online today

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🐦 twitter.com/cambridgecore

Useful links

⌂ **Librarian FAQs:** librarians.cambridgecore.org/about/faqs

@ **Customer Services:** academictechsupport@cambridge.org

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