Cambridge Core

Librarian Account userguide

- Update your organisation details
- Download bibliographic data
- Manage content requests & view holdings
- Access usage statistics

Cambridge Core

Cambridge Core is the 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, locate the 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 arrow next to your first name and last initial at the top right of the page, then select **My Account**

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

- Retrieve usage statistics

- Find user guides and training
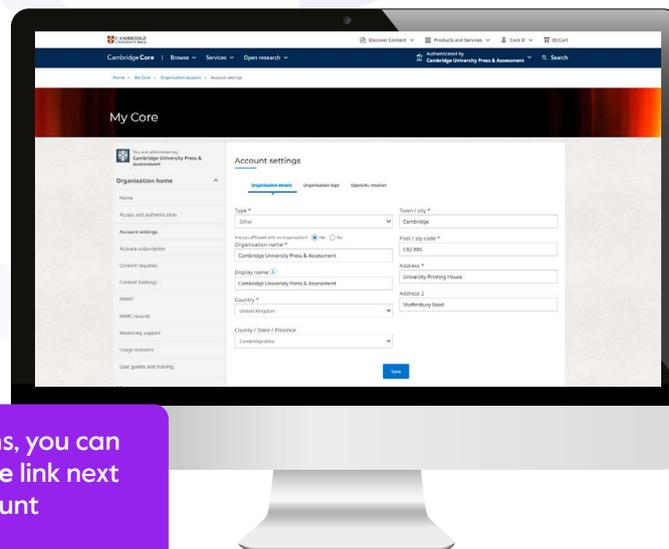
If you are an administrator of multiple organisations, you can easily switch between them by selecting the **Change** link next to **You are administering** in your organisation account

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

4   Cambridge **Core**
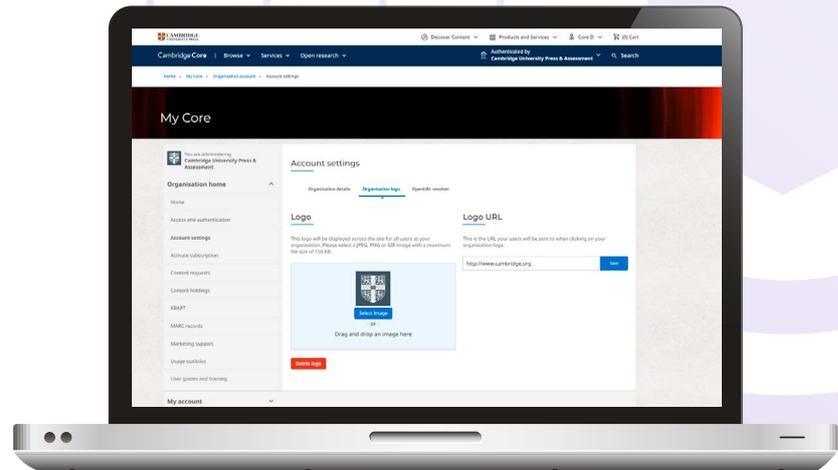
Account Settings

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
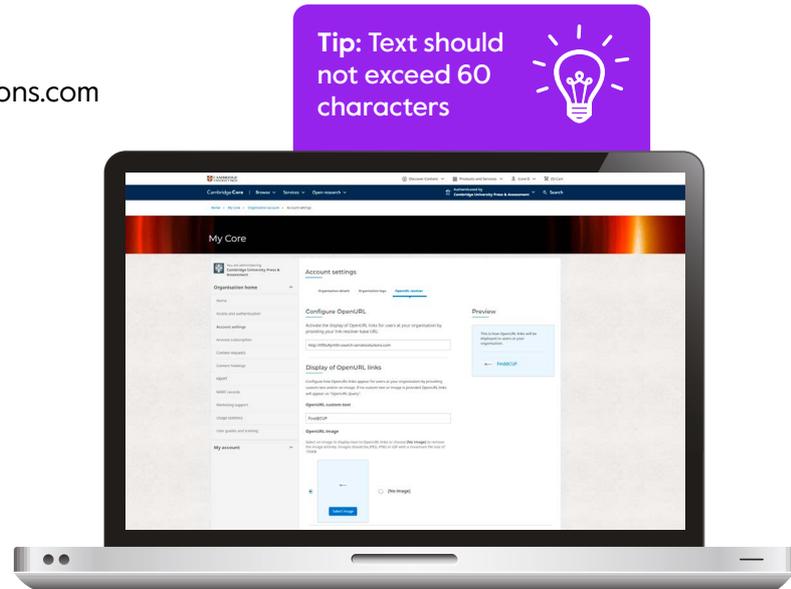
Account Settings

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
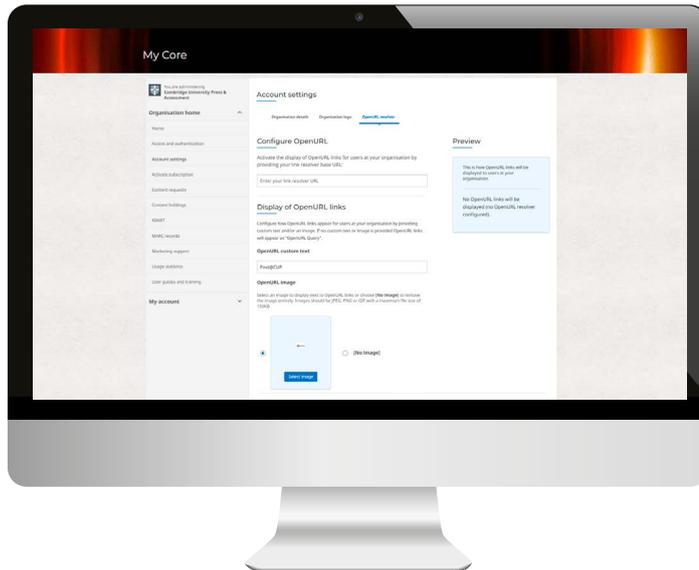
7 To update the OpenURL settings, just remove/overwrite the existing OpenURL, as well as the Open URL custom text or upload a new image and select **Save**

Bibliographic Data

Download MARC records, OCLC control numbers & KBART lists

1 On the Organisation account page, select either KBART or MARC records, depending on the desired record format from the sidebar menu.

2 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 package** – Download records for specific groups of titles in packages you have purchased

3 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)

4 Click **Download**

Please note that there might be issues with "Activate KBART automation." We are aware of this issue and are working on it. If you are experiencing any problems with this, please let us know at library.sales@cambridge.org

The KBART and MARC records 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
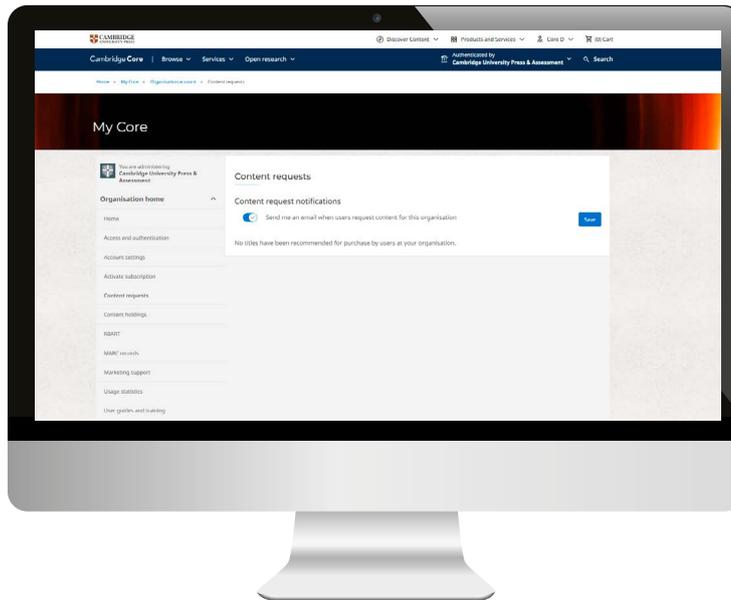
Content requests

The purpose of this page is to view the list of content that has been requested by the users in your organisation. These requests arise from your patrons using the "recommend to your librarian" button on content pages. 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
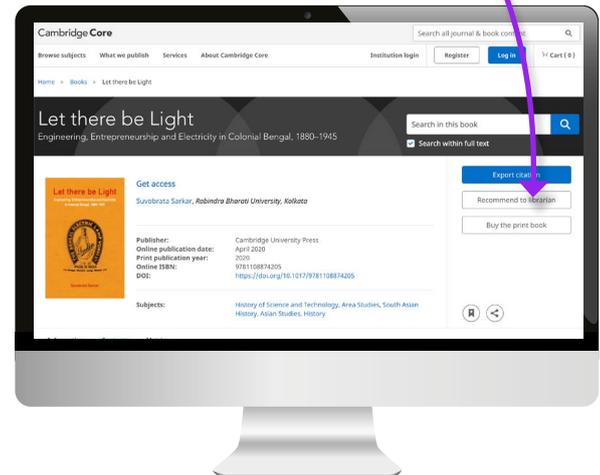
Content Requests and Holdings

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

I 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**
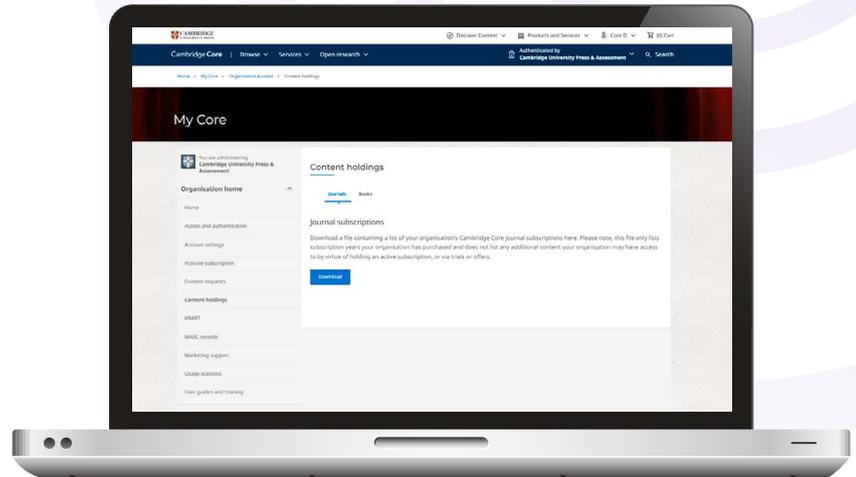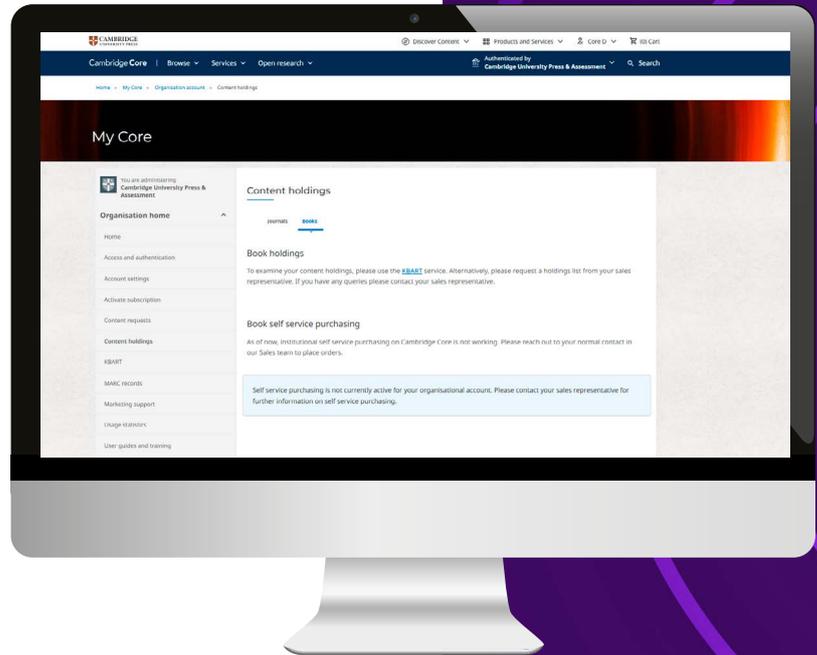
** Please note that this list does not include any additional content an organisation may have access to by virtue of holding an active subscription, or via trials or offers

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

– If you need more detailed book holdings or specialised requests about access please contact your regular <u>sales representative</u>

** 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**
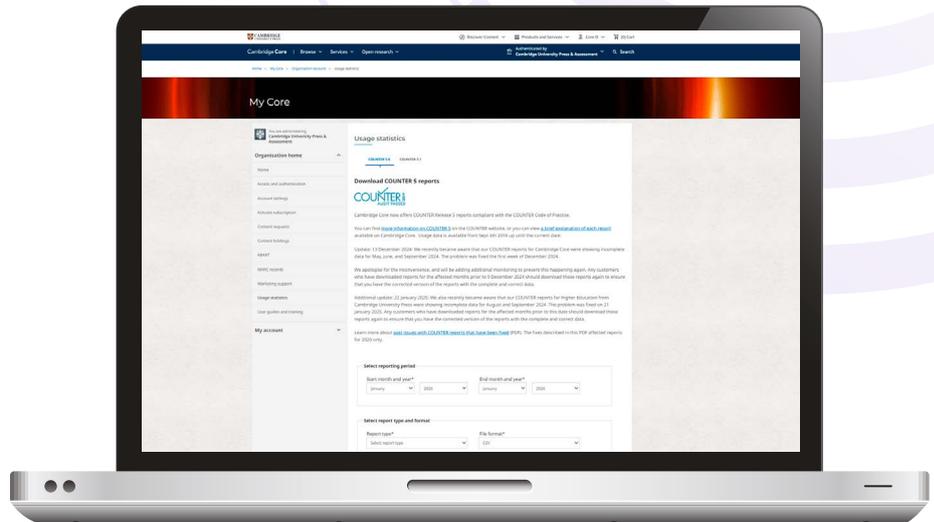
What do the report types mean?

PR - Platform Master Report: a customizable report for usage across the entire platform, with options to add filters e.g. by data type or metric type

PR P1 - Platform Usage: a standard view of platform-level usage summarized by metric type

TR - Title Master Report: a customizable report showing usage at title level, with options to add filters e.g. by data type or metric type

TR B1 - Book Requests (Excluding OA Gold): a report showing full-text usage for books, excluding Gold Open Access content

TR B2 - Book Access Denied: a report showing activity for book content where users were denied access e.g. due to their institution not having purchased or subscribed to the content in question

TR B3 - Book Usage by Access Type: a report on book usage showing metric types broken down by access type

TR J1 - Journal Requests (Excluding OA Gold): a report usage of journal content, excluding Gold Open Access content, as total item requests and unique item requests

TR J2 - Journal Access Denied: a report showing activity for journal content where users were denied access e.g. due to their institution not having purchased or subscribed to the content in question

TR J3 - Journal Usage by Access Type: a report on journal content usage showing metric types broken down by access type

TR J4 - Journal Requests by YOP (Excluding OA Gold): a report on journal content usage (excluding Gold Open Access content) broken down by year of publication, with data for total item requests and unique item requests

Find out more about COUNTER report types >

# 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 Shibboleth tab to view any Shibboleth ID's that are currently associated to your account or to configure access for your institution

- Configuring Shibboleth access will enable users at your organisation to authenticate on Cambridge Core by single sign-on with your systems.

- 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
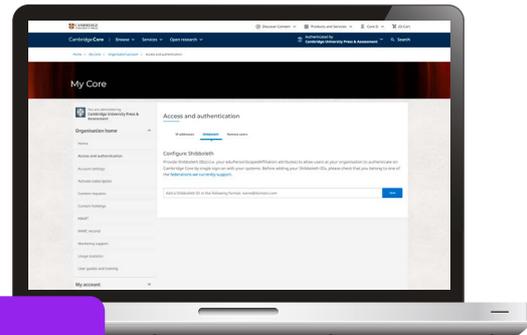
Did you know?
Cambridge Core also supports inbound OpenURL.
Our base URL is **https://www.cambridge.org/core/openurl**

Contact us

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

@ library.sales@cambridge.org

Find us online today

🏠 cambridge.org/core

Useful links

🏠 **Cambridge Core Help Centre**

🏠 **Cambridge Core Support**

Cambridge Core