Taylor & Francis eBooks

FAQ for Librarians

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1. Login and My Account

1.1 How do I sign up?

Click the "Login" button in the header on any page. Then, click "Sign up" below the sign in box. You will need to enter your full name, email and password. The password must be at least 8 characters long and include at least one of each of 0-9, a-z, A-Z and Symbol
(e.g. ! # ? $).

1.2 How do I login?

Click the "Login" button in the header on any page; this will take you to the login page. If you already signed up with Taylor & Francis, enter your account email and password. If you have forgotten your login credentials, contact Customer Support: support@taylorfrancis.com or if you need to reset your password you can use the link
https://accounts.taylorfrancis.com/identity/#/reset-password?reset=true

1.3 Why can't I log in?

There are several reasons why you may not be able to log in. Below are the most common situations:

•   Have you completed the verification process? If not, look for the verification email in your inbox/spam folder. To have the verification email resent, press Sign-Up with the same email address.

•   If you have forgotten your login credentials, contact Customer Support: support@taylorfrancis.com. address.

•   Third Party cookies need to be enabled on your browser, please check Privacy settings.

1.4 How do I reset my password?

• Click on the 'Forgot Password' link on the login screen
• Enter your email address to receive and email with instructions to reset your password.

Note: You cannot reset your password for Shibboleth or OpenAthens through the above link. Please contact either your institute / organisation to reset passwords for accounts.

1.5 How do I change my password?

Please visit your My Account profile to change your password. You need to enter your new password twice and click the Save button to change it. Remember your password should be at least 8 characters long and include at least one of each of 0-9, a-z, A-Z and Symbol(e.g. ! # ? $).

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2. Access to content

2.1 How do students gain access to content?
If students are on campus, they should automatically be granted access to the content your institution has purchased by registered IP range/s. If students are off-campus, they will need to log in: either to the university VPN using credentials provided by the university; EzProxy; or, if your institution has added a Shibboleth or OpenAthens by clicking the respective boxes and entering the log on details given by the organisation/institution.

2.2 What authentication methods does the website support?
For launch the website will be supporting IP, EZProxy IP version 6 onwards, and Shibboleth/OpenAthens as authentication means, but we will be continuing to develop our authentication options.

Please note that Taylor & Francis cannot provide any support, or configuration advice for EZProxy. Support for EZProxy is handled by OCLC who can be contacted at: www.oclc.org/support/services/ezproxy.en.html

IPv.6 is not currently available.

2.3 What search functionality is supported on the platform?
When users perform a search, they have a number of options to refine their results. They can select a number of filters such as: show content I have access to, subject, publication date, and publisher imprint. They can also search using Boolean terms and queries provided that they are familiar with constructing them.

2.4 How can I limit search results to only show results for content to which I have access?
In the search results page, tick the checkbox for "Show content I have access to."

2.5 How can I browse for all content in a particular subject or NetBase?
From the home page https://www.taylorfrancis.com/, scroll to "Browse By Subjects". Click on your top-level subject to be taken to the search results for all books and chapters under this subject. To refine these results, choose a sub-subject from the filters on the left-hand side and/or add a keyword in the search box. There are up to 4 levels of subject.

To view all books in a NetBase Collection scroll down to the "Featured Collections" and click on the collection at which point you will be able to

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click on "Explore;" after which you will have an option to download the books list or request a trial to the content. You will need to have a registered account to request a trial.

2.6 What should I do if I can't find a book to which I should have access?

Please email our customer support team on support@taylorfrancis.com

2.7 How can I purchase content?

To purchase content displayed on this site, please contact your sales representative or contact support@taylorfrancis.com

2.8 What browsers are supported?

We support Internet Explorer 11 and above, Safari, Firefox and Google Chrome. Taylor & Francis eBooks is fully responsive on mobile and tablet devices.

2.9 How can I find out what content my institution has access to?

1. Navigate to 'Entitlements' within the dashboard; click on 'Entitlements'
2. Select 'Access Entitlements' where on the right-hand side is the option 'Download Entitlements'. This will generate an CSV file in the left-hand bottom corner for you to access and save if required.

Additional requests in 'Entitlements' can be made on 'Licences' and 'Collections' to download entitlements in these categories.

3.Usage reporting and Managing your MARC records

3.1 Where can I access the Librarian/Dashboard section of the site?

To access the Librarian dashboard, you need to be registered as an administrator on the organisation/institutional account; thereafter:
1. Click on the drop-down in the top right hand corner;
2. Select 'Your Institution' – this will take you to your dashboard. From here you can view your entitlements; licence or by collections; manage your institution settings, request and retrieve MARC & KBART Records and usage and much more.

3.2 What Counter/usage reports are available?

There are multiple COUNTER standard reports which can be downloaded from the site. Counter reports now include historic usage from our legacy platforms where available. You can request reports back to January 2015 for www.crcnetbase.com and www.tandfebooks.com Available are BR1; BR2 and BR3 reports:

BR1 - This report records instances where a user successfully accesses a page which displays or downloads a whole book, which is presented at book title level by month.

BR2 - This report records instances where a user successfully accesses a page which displays or downloads a section of a book, for example a chapter, which is presented at book title level by month.

BR3 - This report records instances where a user attempts to access a page which displays or downloads a whole book or section of a book (for example a chapter), however is unsuccessful and is denied access. This is presented at book title level by month.

For more information on COUNTER standards please visit: https://www.projectcounter.org/wp-content/uploads/2016/03/Technical-pdf.pdf

3.3 How can I download Counter/Usage reports?
1. Navigate to the 'Usage Report' on the dashboard and click on the 'Usage Report' select 'Request Reports.' Ensure you have amended the date to the range of search.
2. Tick each report you wish to view and click 'Request' or if selection more than one click on the 'Request(2)' or 'Request(3)' at the top of the report.

3. These are complete and ready once you receive the email notification or you may view the progress in the 'Data Request' tab and download by clicking on the 'Complete'.

Additional information can be found within 'Usage Reports' on 'Usage Trends' and 'Most popular' which includes reports of denials.

3.4 How can I download MARC records on my entitlements?
1. Navigate to the 'MARC/KBART' on the librarian's dashboard and click on this.
2. Select the tab 'Marc Reports' and follow the instructions for:
   - Downloading all records for all entitlements.
   - Downloading updates or;
   - Requesting a list of ISBN's.
3. Scroll down and click on the 'Get MARC records'. These are complete and ready once you receive the email notification or you may view the progress in the 'Data Request' tab and download by clicking on the 'Complete'.

Note: You will only be able to download the MARC records which you have an entitlement

3.5 What happens if I can't find the MARC record I requested?

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If you have attempted to download a MARC record for a title but it is unsuccessful, there are 2 possible causes:

- MARC records are not available for titles which are not published yet;

- There is an error from our end, thus we're unable to supply you the MARC record. Please contact us should this occur: Customer Services at support@taylorfrancis.com

Downloading MARC records may produce a missing MARC record file.

This file highlights why some of the ISBNs MARC records could not be retrieved. Please note that titles that are not published will not have MARC records available.

3.6 How do I download deletion MARC records?

To remove MARC records from your library management system, you will need to download a 'Deletion MARC record'. To do this:

1. Click on MARC/KBART in the left-hand navigation;
2. Upload spreadsheet with all the ISBN's;
3. Click "GET MARC RECORDS";

4. Once your request has been processed, you will receive a notification via email;
5. Click on the notification link;
6. Download the zip file which will contain the MARC records of the ISBN's you wish to remove to your system.

Note: that you will only be able to download the deletion MARC records that are no longer part of your institutions entitlements

3.8 KBART Reports

KBART reports are now available however only for content you have access too. To generate a KBART report:

1. Navigate to the 'MARC/KBART' on the librarians dashboard and click on this.
2. Select the tab 'KBART Reports' and click on request.

3. These are complete and ready once you receive the email notification or you may view the progress in the 'Data Request' tab and download by clicking on the 'Complete'.

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3.8 How do I view my previous requests for MARC records?

In the librarian dashboard click on the 'Data Requests' in the left-hand navigation. Here you will find all current and past requests which you have made and can reopen by clicking on the word 'Complete'.

4 Miscellaneous

4.1 Where can I find the license type of the content my institution has access to?

You will be able to find this within the entitlements download (refer to item 2.9 on how to download entitlements). Once downloaded column 'F' details the access type.

4.2 How can I view and update the IP addresses and administrators for my institution?

You can check IP addresses and users/administrators on your dashboard under the tab 'Institutional Settings' which has 3 tabs:

- Users – this is a record of administrators
- Remote Access – you will be able to add your IDP or URL for your Shibboleth or OpenAthens to this tab and click the update.
- IP ranges – to view the IP ranges recorded under your organisation/institution

To change IP's and administrator please contact support@taylorfrancis.com

Functionality to allow you to manage administrators and update IP addresses yourself will be added in the future.

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4.3 How do I add my branding to the platform?

Currently branding is not supported so users will not see a specific message that access is provided by your institution. This functionality will be coming in the future.

4.4 Are WAYFless URLs supported - Yes?

WAYFless URLs are supported in the format shown below. Note that the text in red should be replaced with the respective details:

https://www.taylorfrancis.com/start-session?idp=ENTITY ID&redirectUri=T&F URL

4.5 What online accessibility standards are supported?

Currently we support priority 1 (level A) of the W3C Web Accessibility Initiative Guidelines (WAIG).

4.6 What indexing services are the books listed on?

Third party library discovery services (EBSCO, ExLibris, & OCLC) will be updated after the launch of the platform, but redirects will be in place on the 31st October 2017.

4.7 Ezproxy Stanza

HTTPHeader authtoken
AnonymousURL +https://api.taylorandfrancis.com/*
Title Taylor Francis eBooks
URL https://www.taylorfrancis.com
HJ www.taylorfrancis.com
HJ https://taylorfrancis.com
HJ taylorfrancis.com
HJ https://api.taylorandfrancis.com
HJ api.taylorandfrancis.com
HJ https://accounts.taylorfrancis.com
HJ accounts.taylorfrancis.com
DJ taylorandfrancis.com
DJ taylorfrancis.com
Find http-equiv="Content-Security-Policy"
Replace http-equiv="X-Content-Security-Policy"
AnonymousURL -*

COPY ALL

For EZproxy issues please contact Customer Support at OCLC, the provider of this access solution, via e-mail: support@oclc.org or phone: 1-800-848-5800. Taylor & Francis are available for advice and escalation via support@taylorfrancis.com

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4.8 Are Free Trials available?

Yes.
Registration is required to complete a free trial request. If you wish to select a free trial to one of the NetBases please go to www.taylorfrancis.com and scroll down to 'Featured Collections' and click on the NetBase of interest to where you will see 'Trial Request' button. Click this to complete the request form or using the link https://www.taylorfrancis.com/request-trial to request a direct trial to all HSS or STM content. This can also be done from the administrator's logon by going to the homepage and following the above.

4.9 Use of Notifications

Within the administrator's dashboard on the left-hand side is 'Notifications' within this tab, administrators will be able to see notifications of 'New Entitlements;' new MARC records, completed MARC record and KBART requests. From this point, you will be able to download the reports and entitlements by either clicking on the 'blue writing' which contains the word 'download'.

4.10 Who can I contact for help?
For support, please contact our global support team at:
support@taylorfrancis.com