

Taylor & Francis eBooks Online User Guide



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Contents

This guide explains the key features of the Taylor & Francis eBooks site:

- Navigate more easily to the content you want with filtered search
- Get the most out of the site by saving searches and creating your personal reading list

Contents

Getting started: How to register	3	Administrator Access.	18
Getting started: Personal Registration . .	3	Access Entitlements	19
Finding what you need: Search.	4	IP Range	19
Filtered search	4	Manage Administrators	20
Browse by subject search	5	Co-Branding	20
Saving searches	6	Usage Stats	21
Accessing an eBook	8	Help Desk	22
Access types	8	Default Search/Browse Setting.	23
Manipulating search results	10	Frequently Asked Questions	23
Digital Rights Management (DRM) . . .	13		
Personalisation Features	15		
Changing personal details	16		
Reading list	17		

Getting started: Institutional Registration

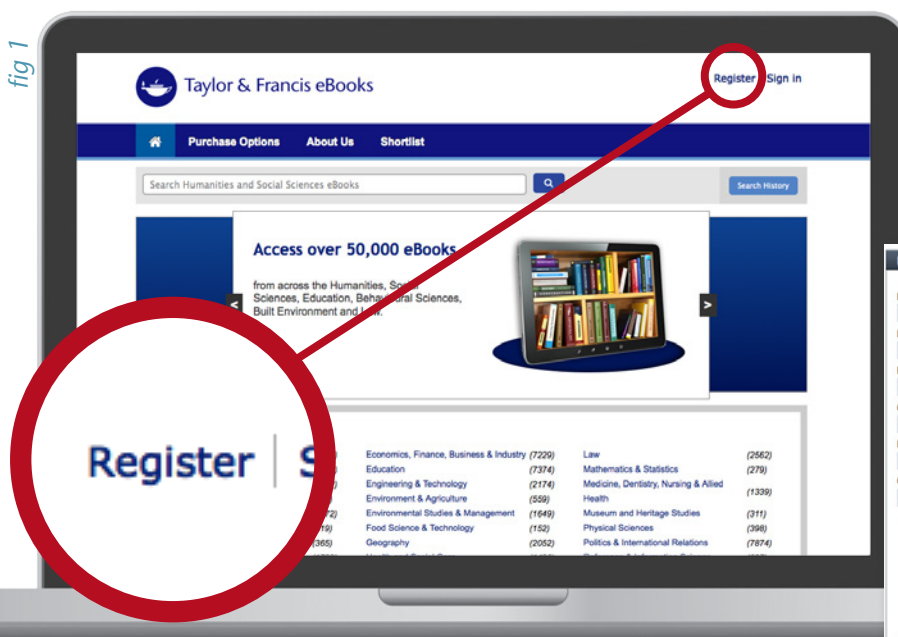
Users will have instant access to the site via their institutional log-in, which will grant authentication through IP recognition, Shibboleth or OpenAthens.

Getting started: Personal Registration

Some functions, such as the personal reading list, are unique to the user. Simply complete a personal registration to get started and make use of these.

To create a username and password, the user first needs to register on the platform, as below.

fig 1



First, select 'Register' from the top-left navigation bar (fig 1).

Then, complete the form (fig 2, below) and click 'Register'.

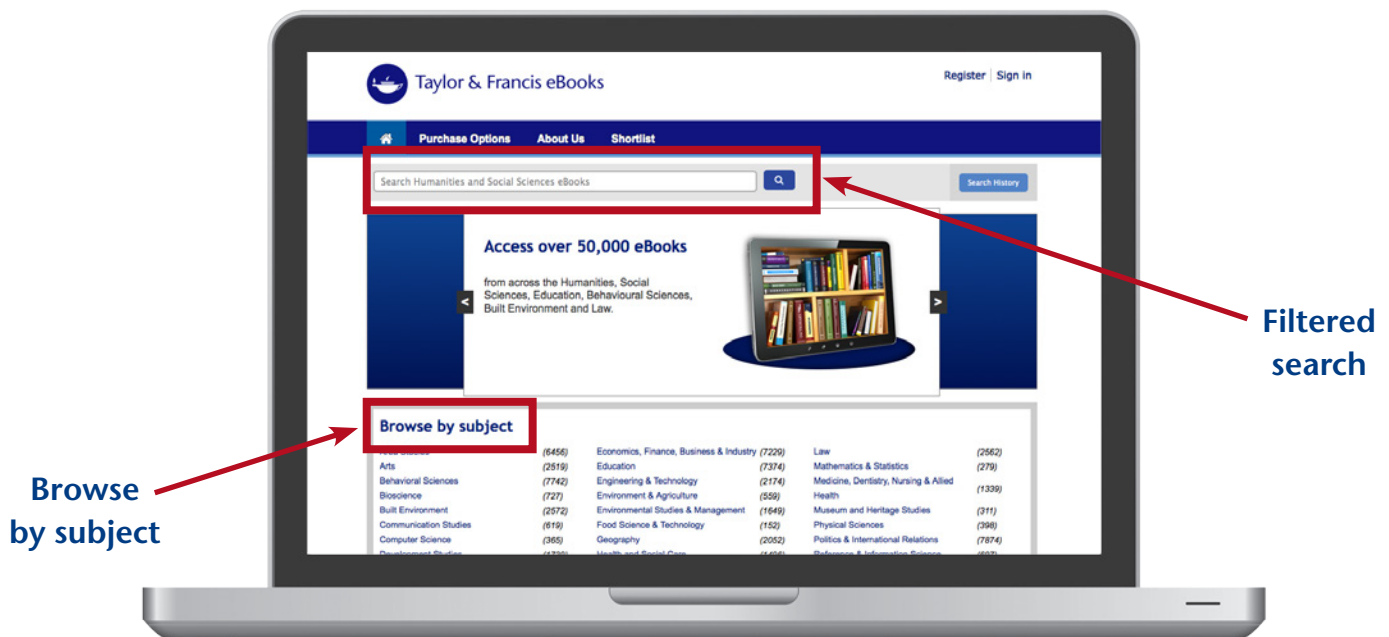
Once registered, the '**Sign In**' option should be selected by inserting your email address and your password. If the password has been forgotten there is a '**Forgot password?**' option.

fig 2

Finding what you need: Search

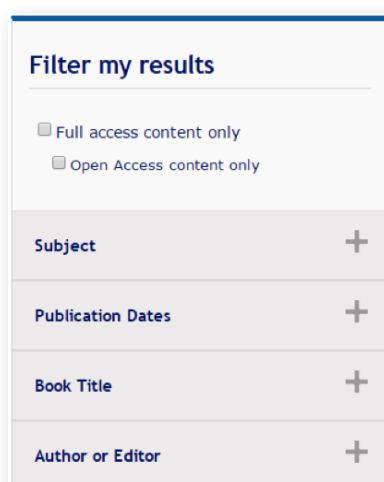
There are two main ways to find content:

- Filtered search, via the main search box
- Browse by subject area



Filtered search

The **filtered search** field will initially search the full text of a book. So if a word or a string of words is entered, matches will be displayed whether the word(s) appear in the Book Title, Chapter Title or body of the book.



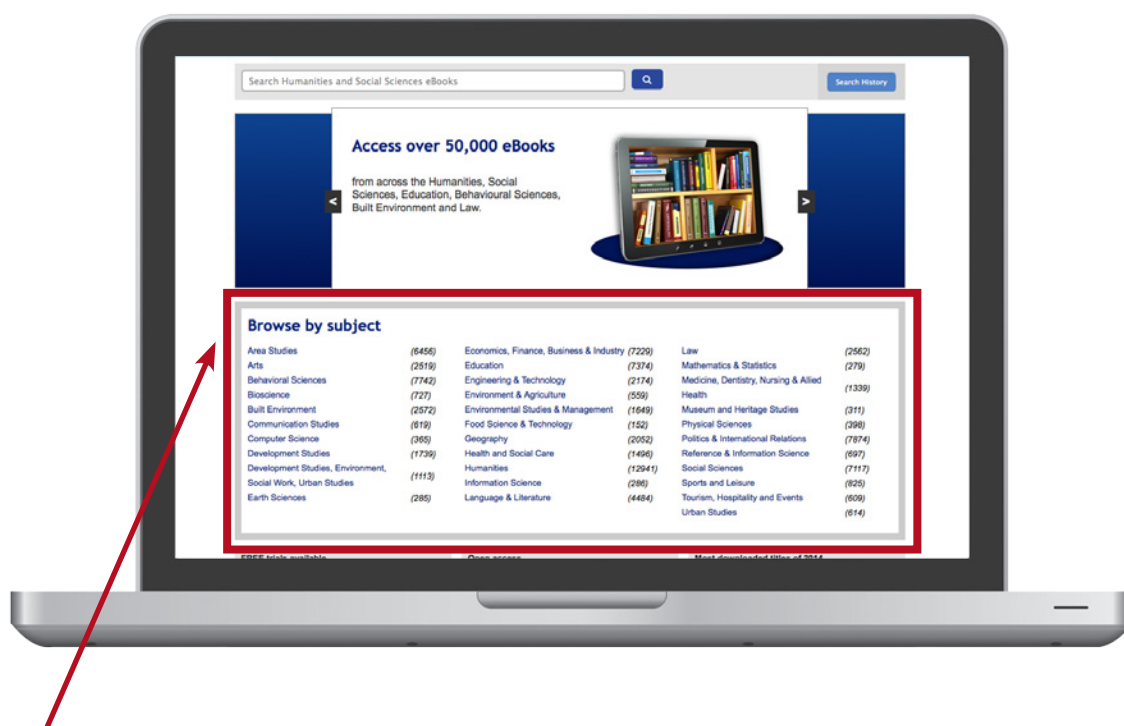
From the initial query, users can then filter their search using a number of facets:

- Search by Access Type (Full Access or Open Access)
- Search by Subject
- Search by Publication Dates
- Search by Book Title
- Search by Author or Editor

Users can of course also perform searches by typing in ISBNs and DOIs.

Browse by subject search

Another navigation option is to 'Browse by subject' from the homepage.



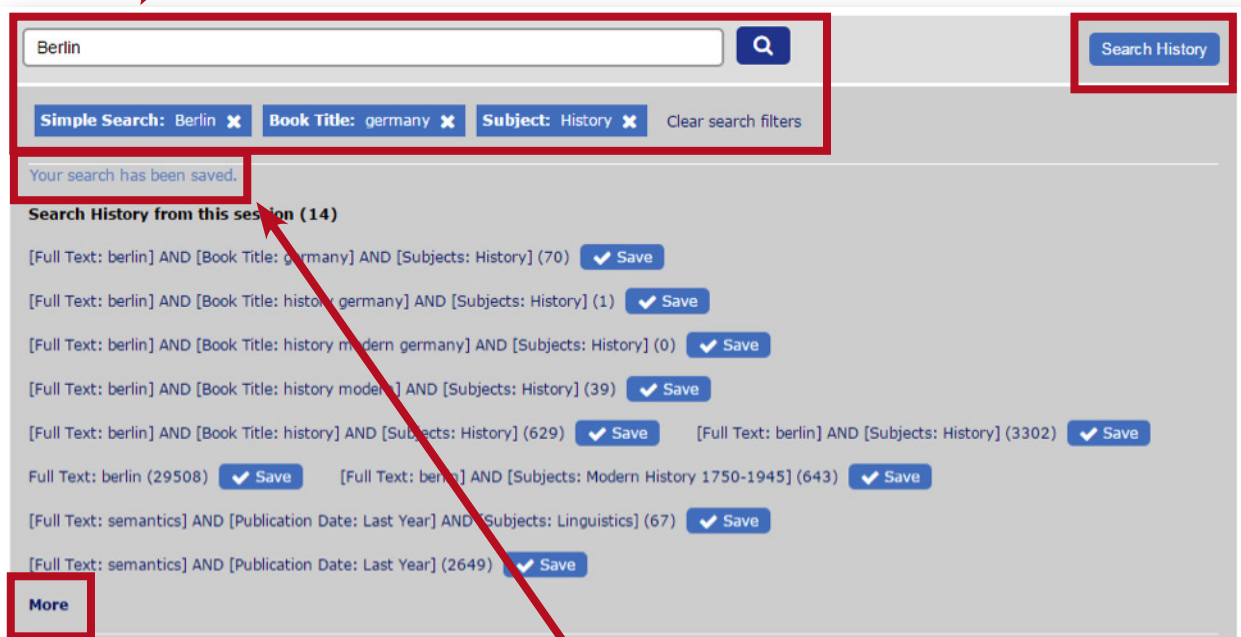
Browse by subject

'Browse by subject' search involves simply clicking on the subject area of interest and then applying filters as required on the results page. The number next to each subject area on the Homepage indicates how many titles the user has access to in each area.

Saving Searches

If the same search is going to be run regularly, it is also possible to save the search criteria for later use, rather than having to re-enter the details each time. This function is only available if the user has registered and has a personal log-in.

1. Once logged in, users should enter the search criteria in the search box and run the search. Multiple search filters can be added until the desired search criteria are reached.
2. Users then need to click 'Search History' where a list of recent searches will appear below the search bar.

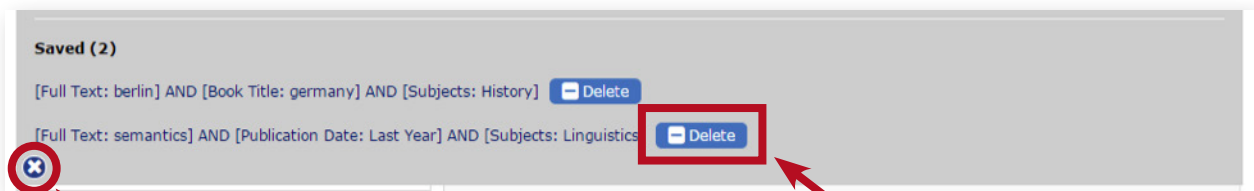


This panel will show a maximum of 10 recent searches, before giving you the option to scroll down by clicking 'More'.

3. To save any selection of search criteria from this list, select the 'Save' button, and a message saying 'Your search has been saved' will appear at the top of the box for confirmation.

Saved Searches are then visible in the second pane under 'Saved', which appears once the 'Search History' button is clicked.

To run a previously saved search, click on the search entry and the whole line becomes a hyperlink allowing the user to run the search again.



The 'X' collapses, to reveal the search results themselves.

To remove any of these search strings, click 'Delete'.

This 'Search History' pane can be opened at any time, on any page, allowing the user to easily return back to the content they need at any time.

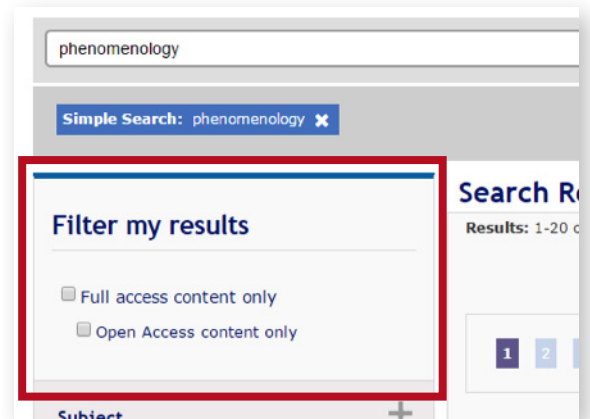
It is possible to receive alerts when new results are identified within a specified search parameter. (The default is to not receive alerts.)

There are further tips on how to achieve even more effective searches here on the site:
www.tandfebooks.com/action/doSearch

Accessing an eBook

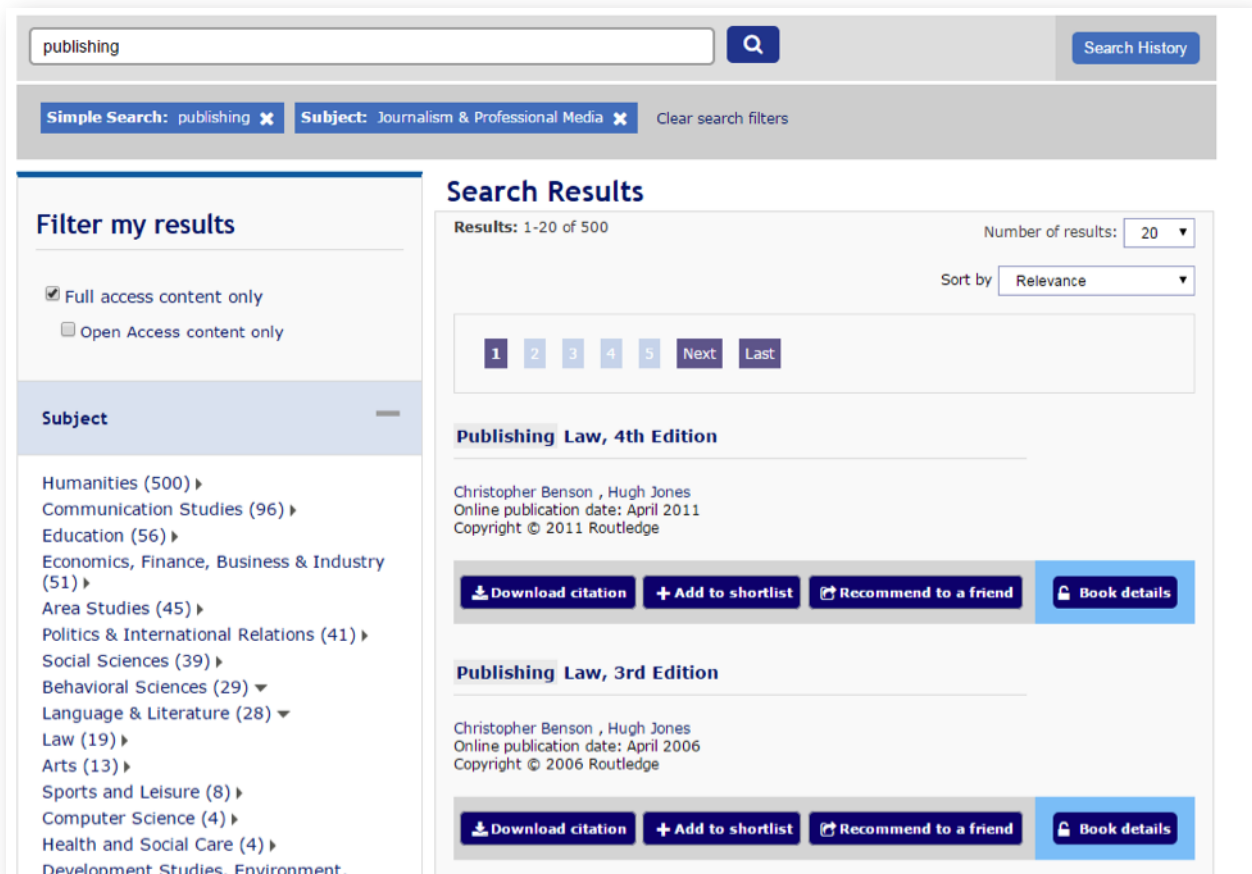
Access types

To help users find the content to which their institution has access, the 'Full Access Content Only' checkbox on the search page can be used to narrow down the search only to the content that has been bought by the institution. Similarly, 'Open Access content only' can be checked if solely Open Access content is what is being sought.



In the example below, a search has been carried out by typing 'publishing' as a simple search term, and then adding a 'Journalism and Professional Media' subject filter. These filters can be seen below the search bar.

Results will be returned from within the 'Journalism and Professional Media' subject category, where 'publishing' appears anywhere in the book's text.



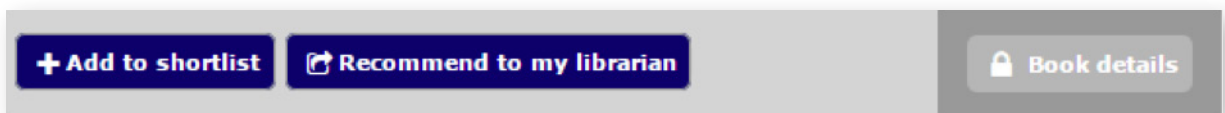
Access indicators

The three access display options are as follows:

1. Titles available to access will have a full blue 'Book details' button with the padlock symbol unlocked.



2. Titles not available to access will show the 'Book details' button greyed out, with a locked padlock symbol.



3. Titles available in Open Access will have the same blue 'Book details' button, but also feature the unlocked Open Access symbol and the 'Open Access' label.

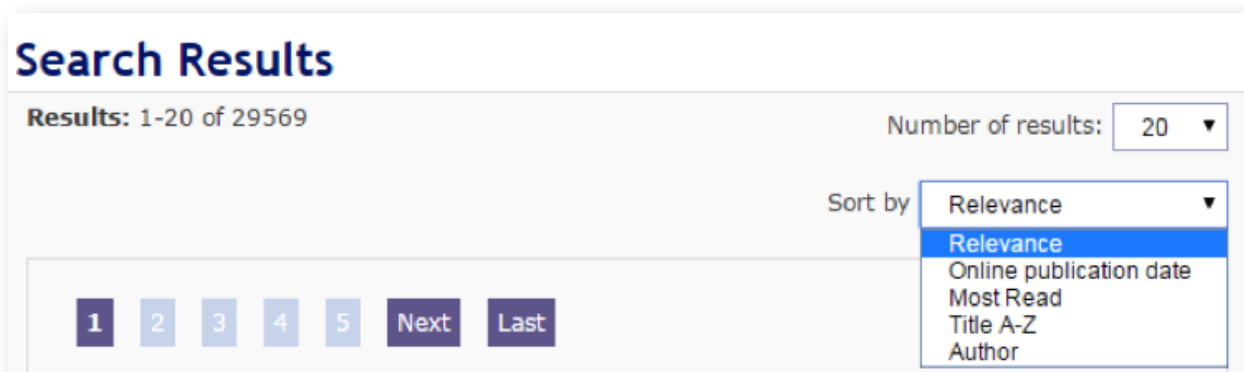


As you can see, the 'Download citation' button is not available when the user does not have access to the book in question, but users can still recommend to their librarian or add it to their personal Reading list.

Using the Reading list is discussed on [page 17](#) of this guide.

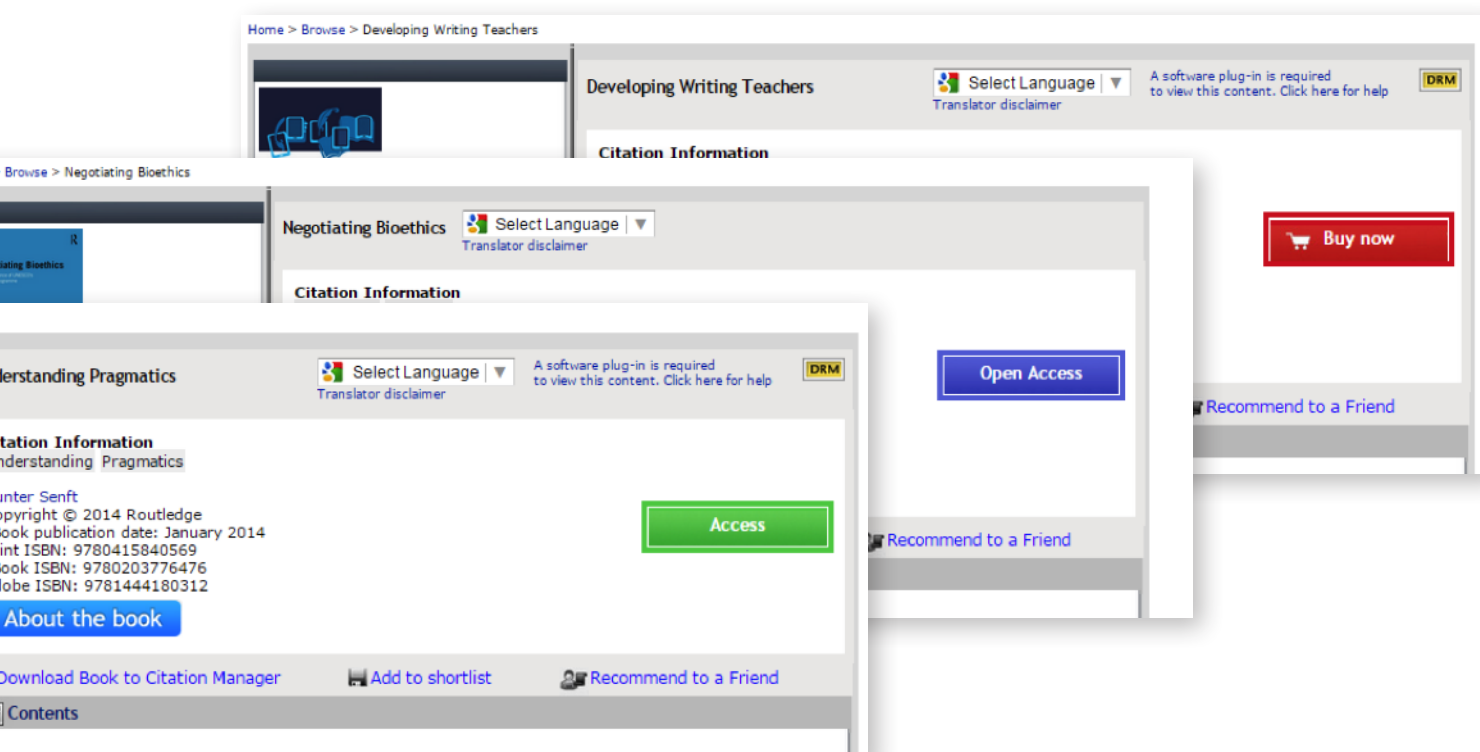
Manipulating search results

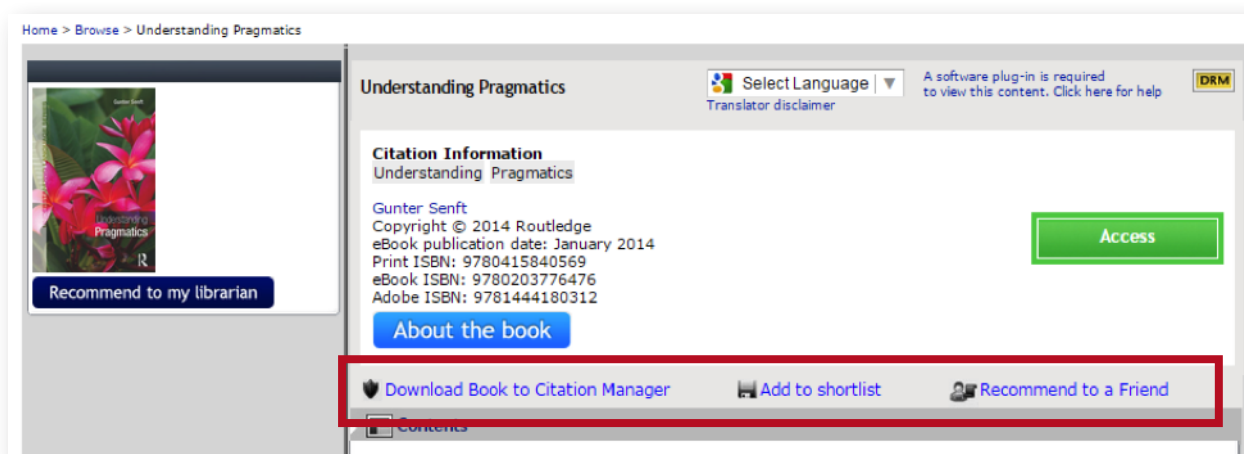
The order of returned search results can be sorted using the 'Sort By' drop down menu, allowing users to rearrange their returned results using the following sorting options: A-Z, author, online publication date, relevancy and most read.



Using an eBook

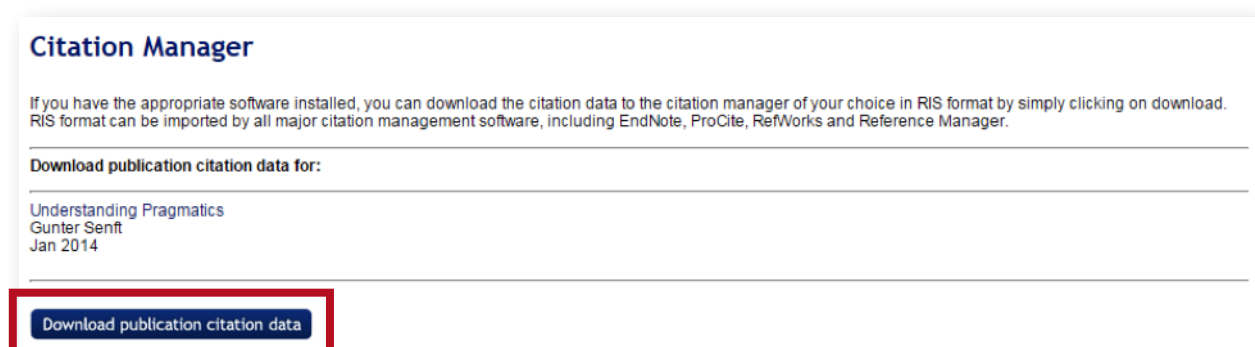
Once a user has navigated to the book page they require, they will be presented with the bibliographic information corresponding to that title, and the option to read it if they have access, or to link out to the Routledge eCommerce website and purchase the title if they do not have access.



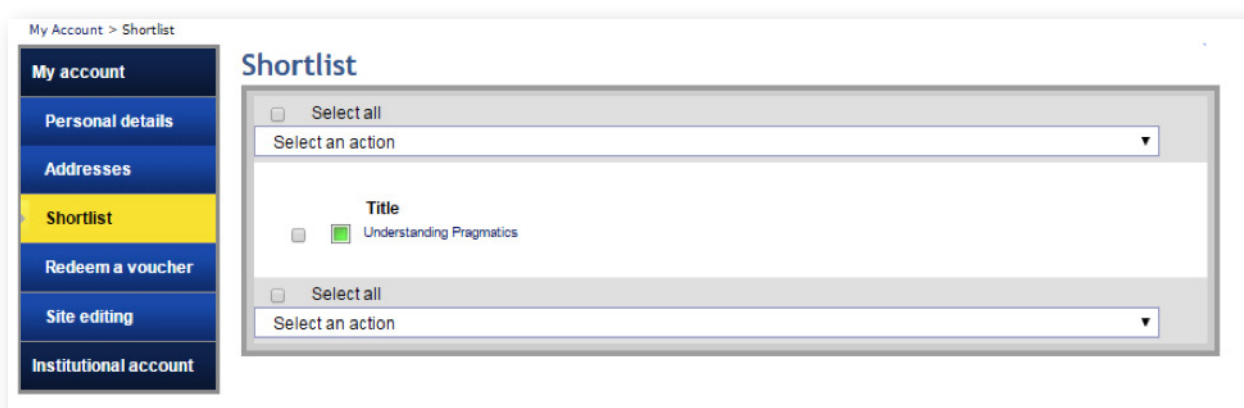


Users can perform the following tasks, as highlighted in the above screenshot:

- **Download the book to their Citation Manager:** downloads an RIS format citation by clicking on 'Download publication citation data' on the page displayed as below. RIS format can be imported by all major citation management software, including EndNote, ProCite, RefWorks and Reference Manager.



- **Add to their Reading list:** adds the book to the user's 'Reading list', where they will see the following display. For more on 'Reading list', see [page 17](#).



- **Recommend to a friend:** send an email to a friend or colleague about the publication.

Email to a Friend

Email a friend or colleague with a link to the following page:

Understanding Pragmatics

Your name:

Your email address:

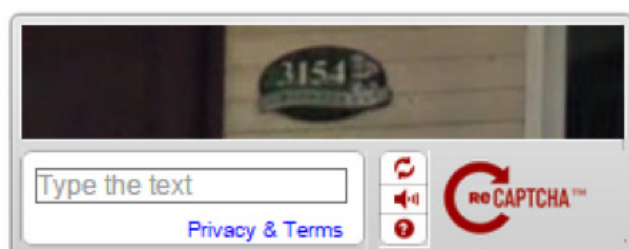
Email to:
Please separate multiple emails with commas

Enter email subject

Personal Message (optional):

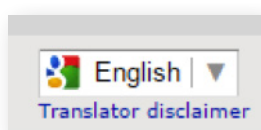
I thought you might be interested in the following publication(s).

☐ Send me a copy of this email.



Send

The e-mail addresses that you supply to use this service will only be used for sending this message.

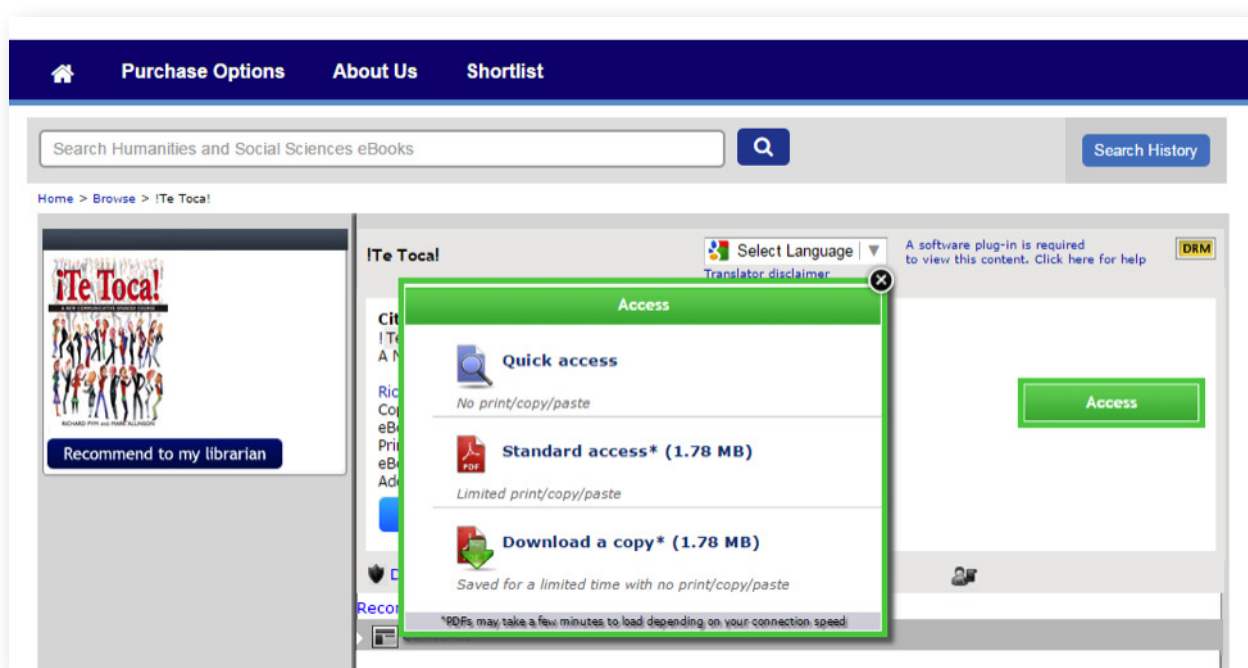


There is also a Google Translate widget which will change the language of the webpage being browsed. The default is English.

Digital Rights Management (DRM)

In response to user feedback, we recently moved to ensure that over 95% of books on www.tandfebooks.com are DRM-free.

In the right hand corner of the book's pane, the icon  indicates whether a title is a DRM-Protected or DRM-Free. If the window shows the DRM icon, the book is DRM-Protected; if it doesn't, then the title has no restrictions on simultaneous use, downloading, printing, cutting or pasting.



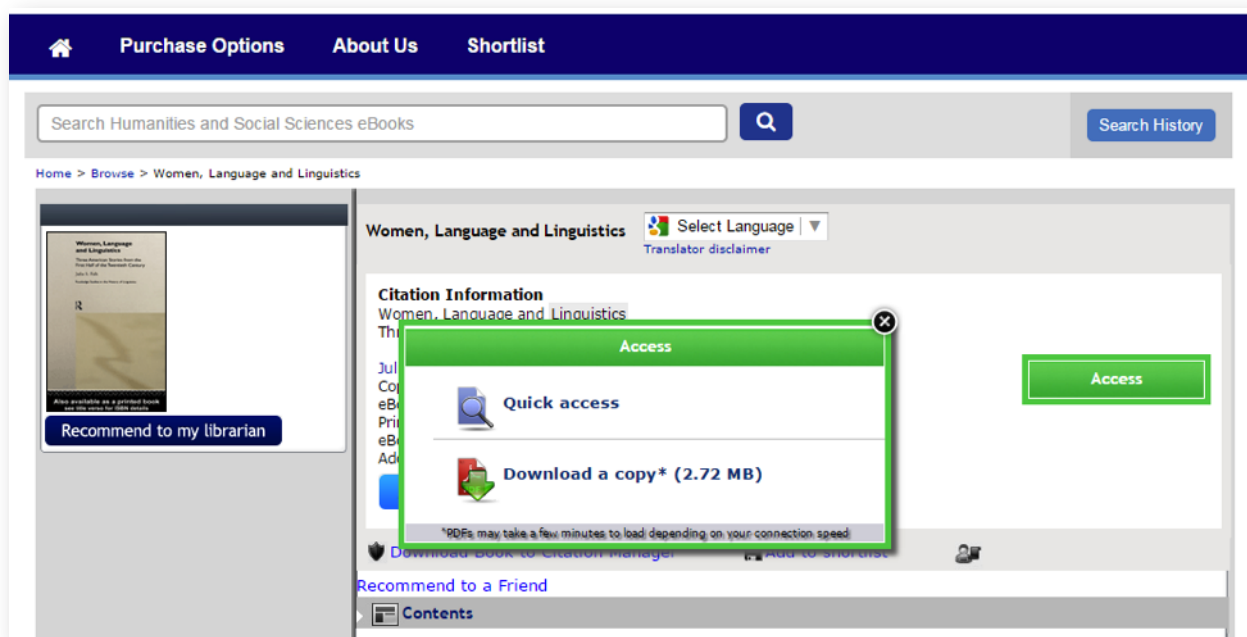
A **DRM-Protected** title the platform offers three access options:

- **Quick Access:** the book is readable online only, fully restricted (no print, copy or paste option). No plug-in is required.
- **Standard access:** installation of the **Plug In** is required; the book is still readable online, print allowance of 30 pages and 1000 words to copy and paste.
- **Download a copy:** the installation of the **Plug-In** is required, access offline for 36 hours, fully restricted (no print, copy or paste option). The log off period can be modified on a customer-to-customer basis.

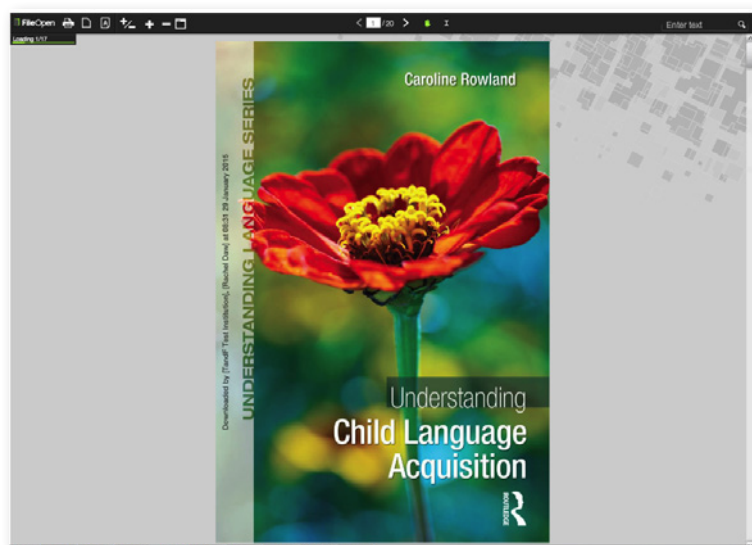
The installation of the **Plug In** is very easy and intuitive; please follow the instructions at <http://plugin.fileopen.com/all.aspx>

For DRM-Free eBooks the access options are as follows:

- **Quick Access:** the book can be read online.
- **Download a copy:** a copy of the title can be downloaded and accessed offline.

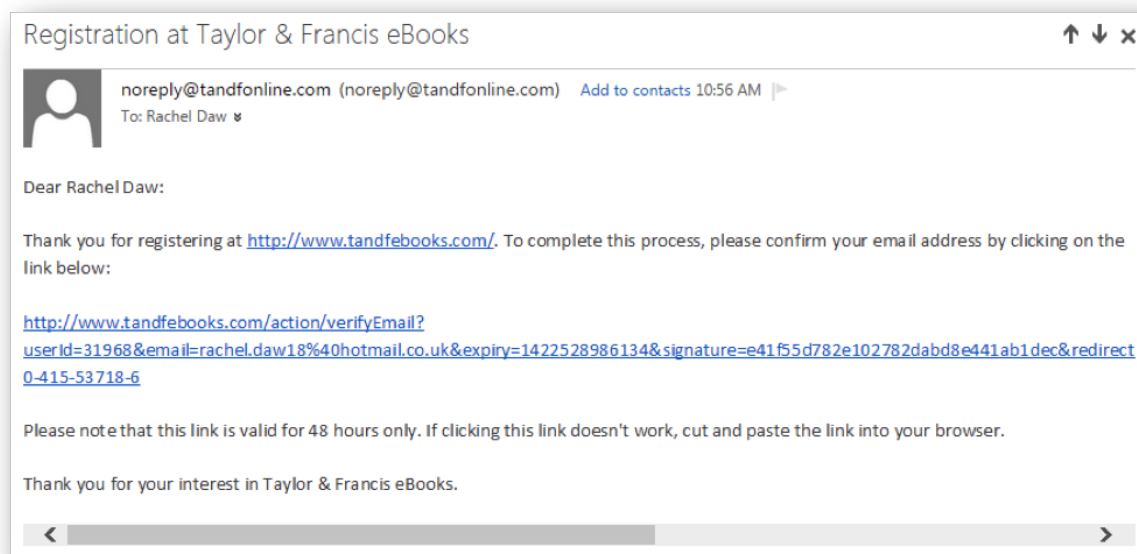


In both cases, once the user has clicked on the preferred option, the content of the title will become available to read in a new window, as below:

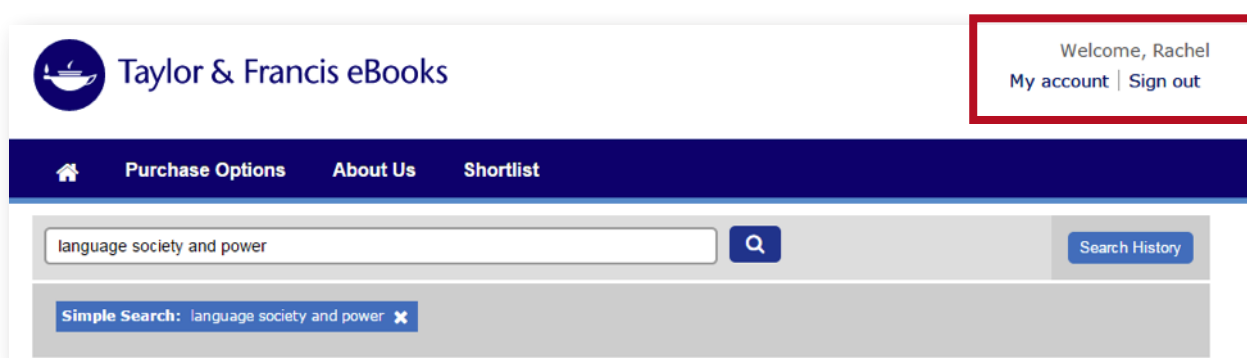


Personalisation Features

Both personal and institutional users have access to additional features when they register on the site. As described at the start of the guide, users sign up using their email address and have to confirm their account via a link sent to their email account, as below.



The 'My account' button directs the user to their personal page:



From this area it is possible to update personal contact details such as Name, Email Address, Organisation Address, change a password and managing shortlisted books.

Changing personal details

To edit contact information, users should click on 'Details' and fill in the form, clicking 'Update account' when complete.

The screenshot shows the 'My account' page for a user named Rachel. The page has a dark blue header with the Taylor & Francis eBooks logo and navigation links: Home, Purchase Options, About Us, and Shortlist. A search bar is located below the header. The 'My account' section is on the left, with links to Personal details, Addresses, Shortlist, and Redeem a voucher. The main content area has four sections: Details (highlighted with a red box), Addresses, Shortlist, and Redeem a voucher. Each section has a 'Manage' button. A red arrow points from the 'Details' section to the 'Manage personal details' form in the bottom screenshot.

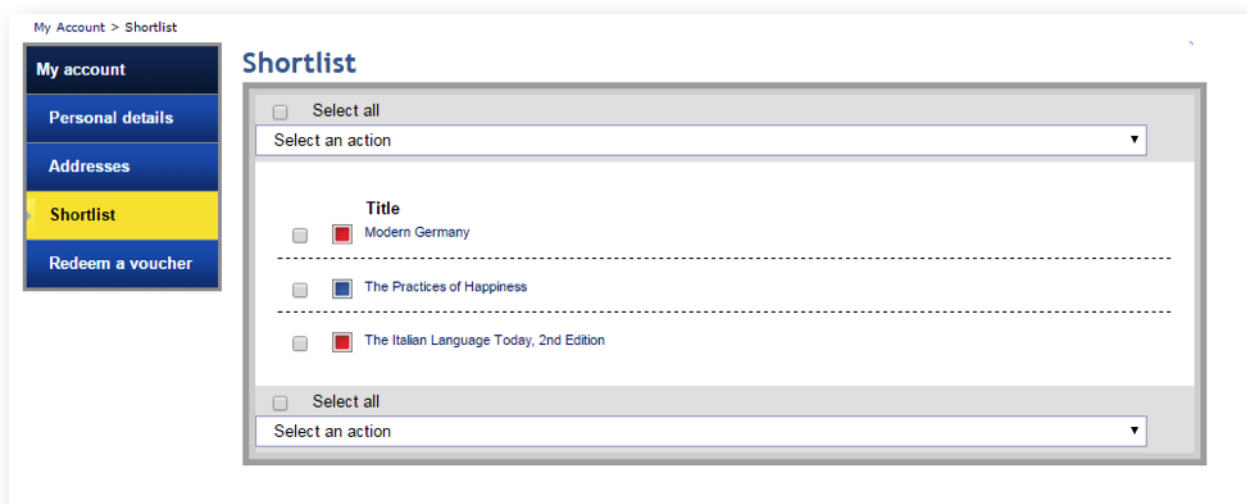
The screenshot shows the 'Manage personal details' form. The form is titled 'Manage personal details' and 'Update details'. It contains the following fields and sections:

- Title:** A dropdown menu.
- First Name *:** A text input field with 'Rachel' entered.
- Last Name *:** A text input field with 'Daw' entered.
- Job title:** A dropdown menu with 'Please select'.
- Department:** A text input field.
- Organization:** A text input field.
- Subject of interest:** A dropdown menu with '---MEDICINE---' selected. A note says 'Max 5 subjects' and 'Ctrl-click to multiple select'.
- Country *:** A dropdown menu with 'Select a Country'.
- Email Address *:** A text input field.
- Confirm email address *:** A text input field.
- Change password:** A section with 'Password *' and 'Confirm password *' text input fields.
- Mail preferences:** A section with a checkbox for 'I agree to receive emails from Taylor & Francis Group'.
- Update account:** A button at the bottom.

* Indicates required fields.

Reading list

The 'Reading list' tab is available for all registered users (whether institutional or individual) and displays the titles for which the 'Add to Reading list' button has been selected on the book page. Items will remain here until the user removes them.

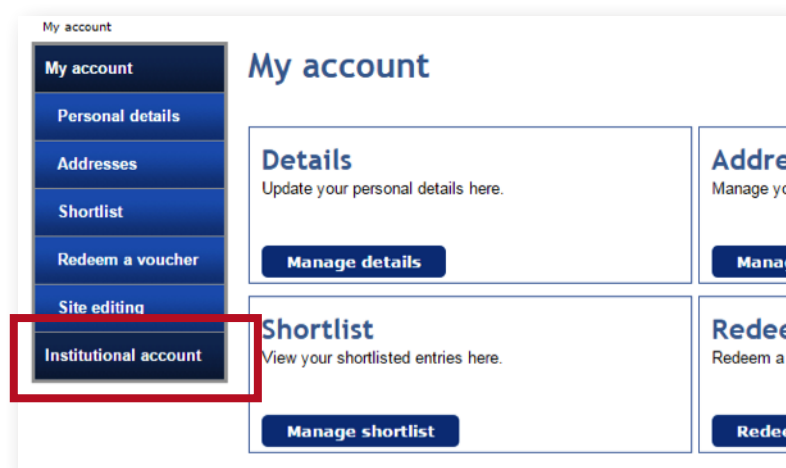


Here, the access levels are indicated as follows, with 'free' equating to 'Open Access':

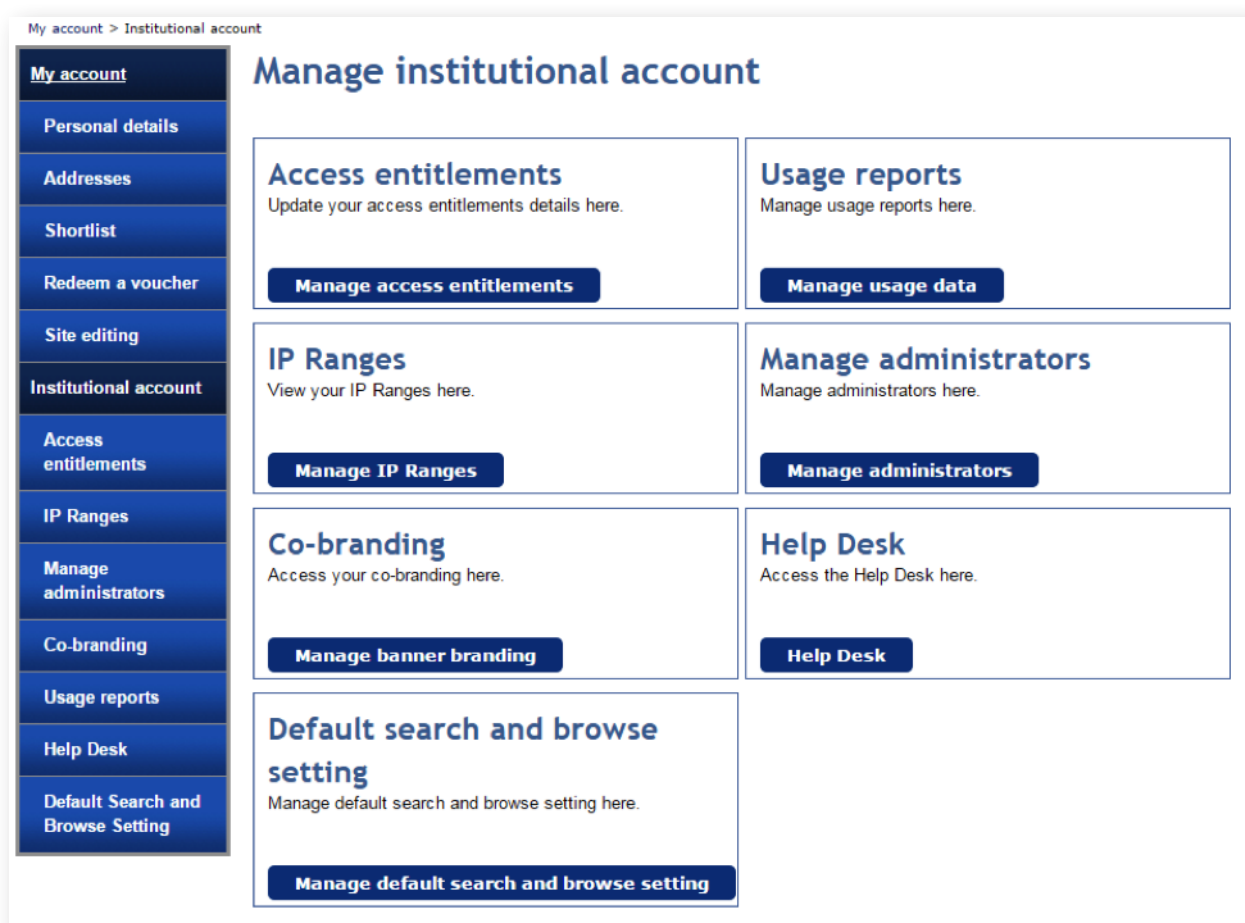


Administrator Access

Administrator access is a higher level of access given only to the administrators of the account who are able to search/access the content, and also have the right to personalise the platform for their institution, download usage statistics and manage IP addresses. This can be done through the 'Institutional account' area (only available when using Administrator accounts) on the 'My Account' button.



The 'Institutional account' area contains seven sub-sections, as seen below:



Access Entitlements

This area is where the administrator can find all the titles the institution has access to, as below:

[NB: in this particular example, the screenshot is from a test institution, which is why only one title is displayed.]

Access entitlements

Title	Coverage	ISSN/ISBN	Access period
 Absent Environments, Theorising Environmental Law and the City		978-0-203-94530-8	Permanent

Download entitlement data

Download this information as a tab separated text file via this link for integration into cataloguing systems.

[Download](#)

IP Range

Administrators can:

- See the IP range(s) currently assigned to their institution
- Email this IP range to themselves by clicking the hyperlinked 'Email me'
- Add new IP ranges

Manage IP Ranges

The IP address of your current internet connection is: 213.212.70.122

Add new IP range(s)

Description

IP ranges

[Add IP range](#)

Examples: 128.23.12.* or 132.10.30-40.* or 112.12.11.15:112.12.12.36

[Email me my IP addresses for my records.](#)

Manage Administrators

On this tab, administrators can be added or recommended.

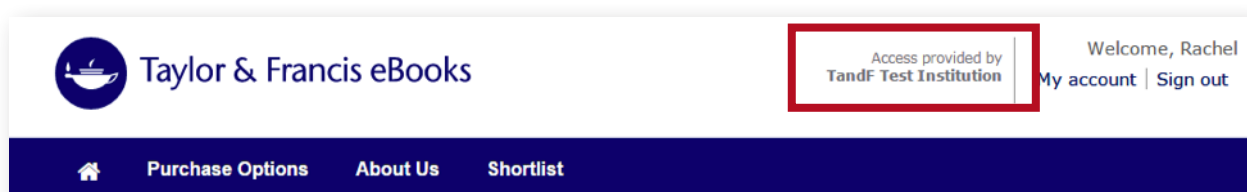
The screenshot shows the 'Manage Administrators' page. On the left is a sidebar with a menu containing: My account, Personal details, Addresses, Shortlist, Redeem a voucher, Site editing, Institutional account, Access entitlements, IP Ranges, **Manage administrators** (highlighted in yellow), Co-branding, Usage reports, Help Desk, and Default Search and Browse Setting. The main content area is titled 'Manage administrators' and includes a sub-header 'Administrators have full rights to this organisational account'. Below this are three sections: 'Add an administrator' with an email address input field and an 'Add administrator' button; 'Delete an administrator' with a checkbox next to 'Rachel Daw' and a 'Send recommendation' button; and 'Recommended a new administrator to your librarian' with an email address input field and a 'Send recommendation' button. A confirmation message states: 'A confirmation email is sent containing a validation link to activate the account'.

Co-branding

On this tab, the administrator can personalise the platform by changing the banner text in the headers, or by adding the logo of the university.

In the example below, a Taylor and Francis test institution can be seen in the top right-hand corner (although there is no logo.)

NB: The uploaded image must be 65 x 65 pixels as a maximum size.



Usage Statistics

Administrators can use this section to retrieve usage statistics.

My account > Institutional account > Usage reports

My account

Personal details

Addresses

Shortlist

Redeem a voucher

Site editing

Institutional account

Access entitlements

IP Ranges

Manage administrators

Co-branding

Usage reports

Help Desk

Default Search and Browse Setting

Manage usage reports

Our SUSHI request URL is: <http://www.tandfebooks.com/api/soap/analytics/SushiService>
Your Requestor ID is: name@email.com
Your CustomerReference ID is: null

Email Notifications

☒ Notify all Institutional Administrators at this institution when COUNTER usage data for the current month has been processed and is ready for reporting.

[Update Setting](#)

Delivery via Email

☒ By year 2015 ▾

☐ Select Range:

From: January ▾ 2015 ▾

To: January ▾ 2015 ▾

Report type

☒ **Select all reports**

☐ Platform Report 1 (Total Searches, Result Clicks and Record Views by Month and Platform)

☐ Book Report 1 (Number of Successful Title Requests by Month and Title)

☐ Book Report 3 (Access Denied to Content Items by Month, Title and Category)

Format type

☐ XML

☒ HTML

☐ Tab-delimited text

Recipients

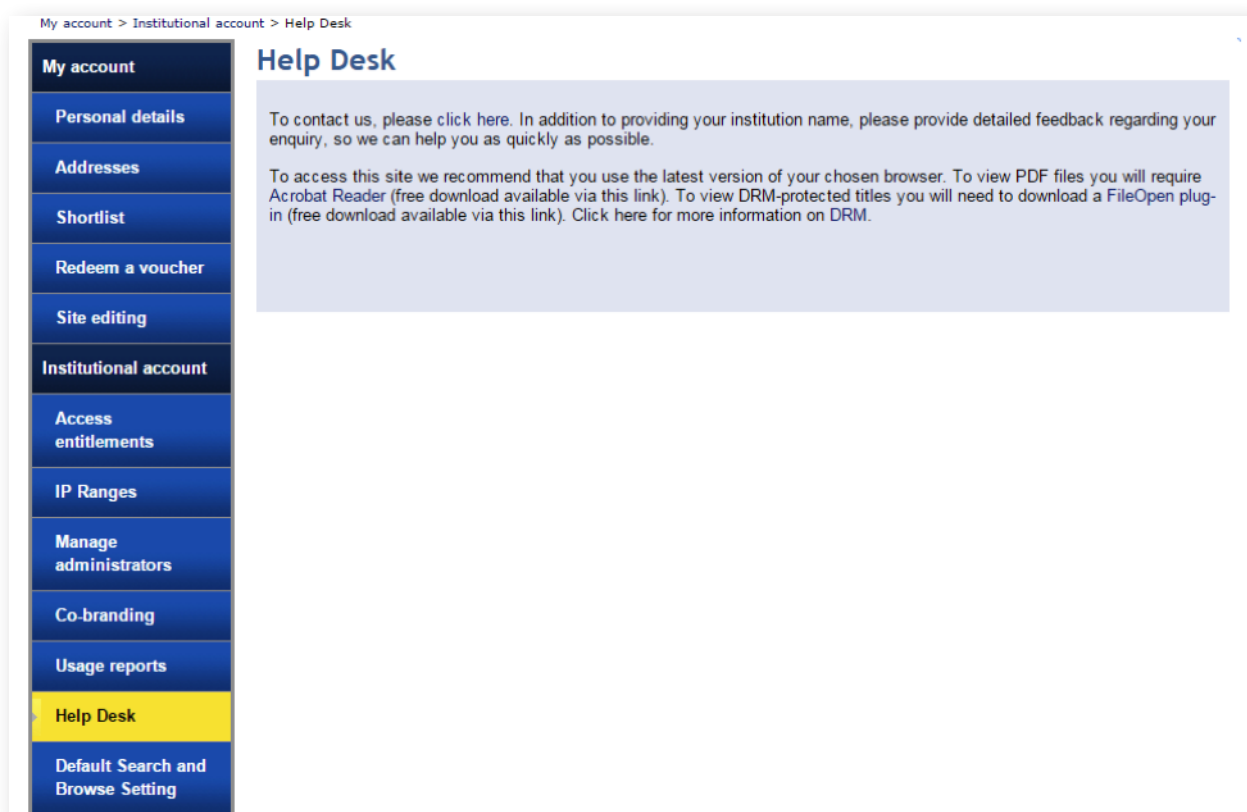
☒ name@email.com

☐ All administrators of this organization

[Claim voucher](#)

Help Desk

This area includes the details of our Customer Service department in case administrators ever need to contact us.



The screenshot shows a web application interface. At the top, a breadcrumb trail reads "My account > Institutional account > Help Desk". On the left is a vertical sidebar menu with blue buttons. The "Help Desk" button is highlighted in yellow. The main content area has a light blue header with the title "Help Desk". Below the title, there are two paragraphs of text. The first paragraph provides a link to contact customer service. The second paragraph provides recommendations for browser and PDF viewing, including links for Acrobat Reader and FileOpen plugin.

My account > Institutional account > Help Desk

My account

- Personal details
- Addresses
- Shortlist
- Redeem a voucher
- Site editing

Institutional account

- Access entitlements
- IP Ranges
- Manage administrators
- Co-branding
- Usage reports
- Help Desk**
- Default Search and Browse Setting

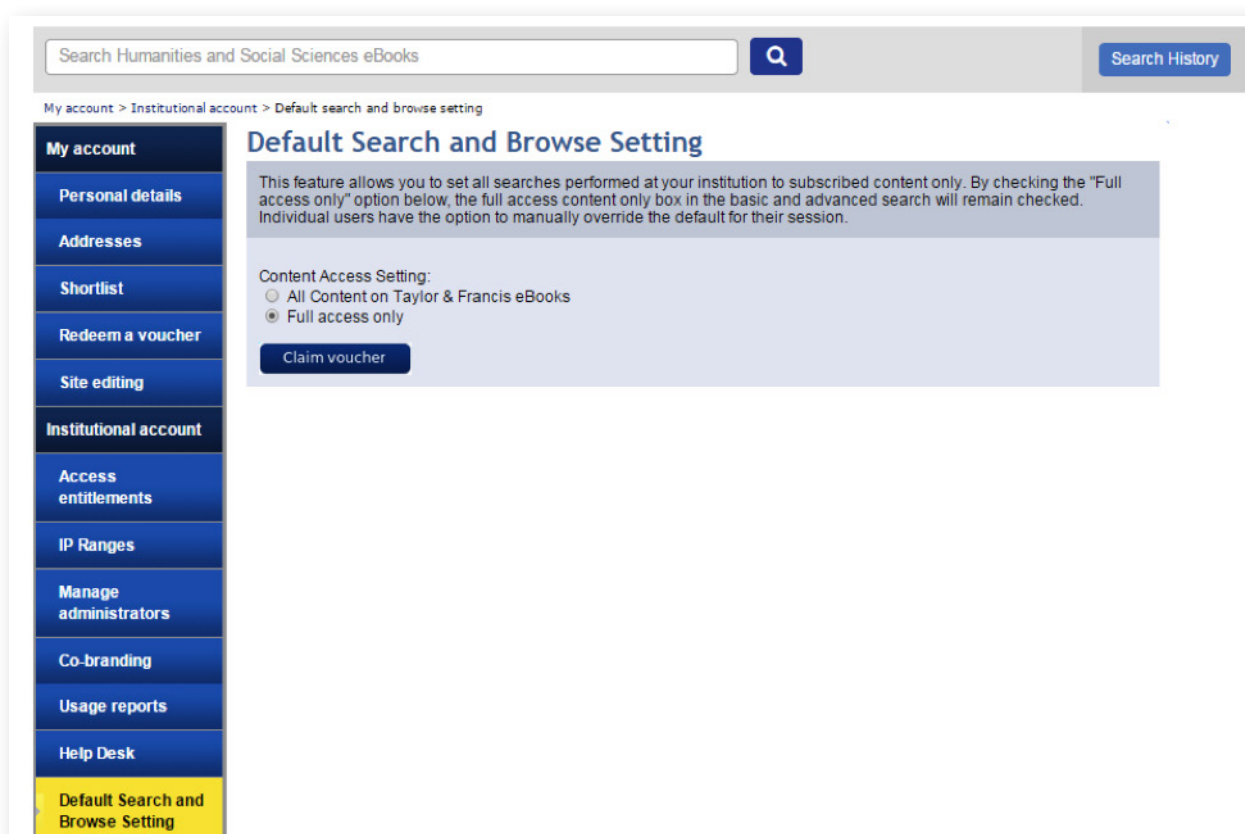
Help Desk

To contact us, please [click here](#). In addition to providing your institution name, please provide detailed feedback regarding your enquiry, so we can help you as quickly as possible.

To access this site we recommend that you use the latest version of your chosen browser. To view PDF files you will require Acrobat Reader (free download available via [this link](#)). To view DRM-protected titles you will need to download a [FileOpen plugin](#) (free download available via [this link](#)). Click [here](#) for more information on DRM.

Default Search/Browse Setting

On this page, administrators can decide whether the 'Full Access Content Only Button' should be ticked by default for their institution.



Frequently Asked Questions

If you require additional information or support please visit our help page at www.tandfebooks.com/page/help