

CABI Training Materials
CABI Choice collections
Librarian Portal User Guide

Contents

Introduction	3
Accessing the Librarian Portal.....	4
Home page.....	4
Browsing collections.....	5
Searching for books	5
Downloading MARC records	7
Downloading Usage reports	8
Customer Profile	9
Adding your institution's logo	9
Checking IP ranges.....	9
Access control settings.....	10
Creating librarian administrators	10
Amending administrator access	12
Creating end-user accounts	12
Appendix: DRM restrictions.....	13

Introduction

CABI's eBooks are now available through a number of flexible collections using CABI's Choice Collection platform. These include the following types of collections:

CABI Choice Subject collections: Pick from a selection of collections across all areas of applied life sciences covered by CABI's publishing program.

CABI Choice Reference: CABI's key reference eBooks can now be individually purchased to build your eBook library and offer online access to essential Dictionaries, Encyclopaedias and Taxonomic Keys.

Choice 100: Create your very own library of up to 100 titles from CABI's extensive eBook catalogue of over 600 titles.

System requirements

Operating system

Windows

- Windows XP with Service Pack 2 (SP2) or Windows 2000 Service Pack 4 (SP4) or Windows Vista or later.
- Both 32 and 64 bit versions are supported.
- 500Mhz or faster Intel Pentium processor
- 128MB of RAM

Macintosh PowerPC

- Mac OS X version 10.3.9 (or higher) or 10.4.8 (or higher)
- 500MHz or faster PowerPC G4 or G5 processor
- 128 MB of RAM

Macintosh Intel

- Mac OS X version 10.4.8 (or higher)
- 500MHz or faster processor
- 128 MB of RAM

Linux

- 2.4.37 or later
- 500MHz or faster processor

- 128 MB of RAM

Note: If using Linux, *you will not be able to download* eBooks. This is because Adobe Digital Editions, the program we use to enable downloads, does not support **Linux OS**. You will, however, *still be able to read eBooks online using your web browser*.

Other Software

- Adobe Flash Player 9.0 or later
- Adobe Digital Editions 1.7.1 or later

Monitor

Monitor with at least 800 x 600 screen resolution

Browsers

- Microsoft IE 6 (Windows)
- Microsoft IE 7 (Windows)
- Safari 3 (Mac Windows)
- Firefox 2+ (Windows Mac Linux)
- Netscape 7.1+ (Windows Mac Linux)
- Google Chrome (Windows)

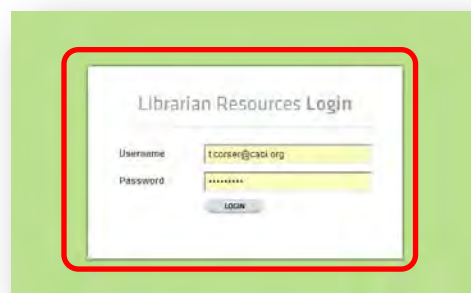
Accessing the Librarian Portal

CABI Choice collections are available through CABI's Choice Collection platform. This provides two portals designed to accommodate the different users that need to access the eBook collections;

- *Librarian portal* - for librarian staff or information specialists at the institution
- *Patron Portal* - for the end-users to access eBooks

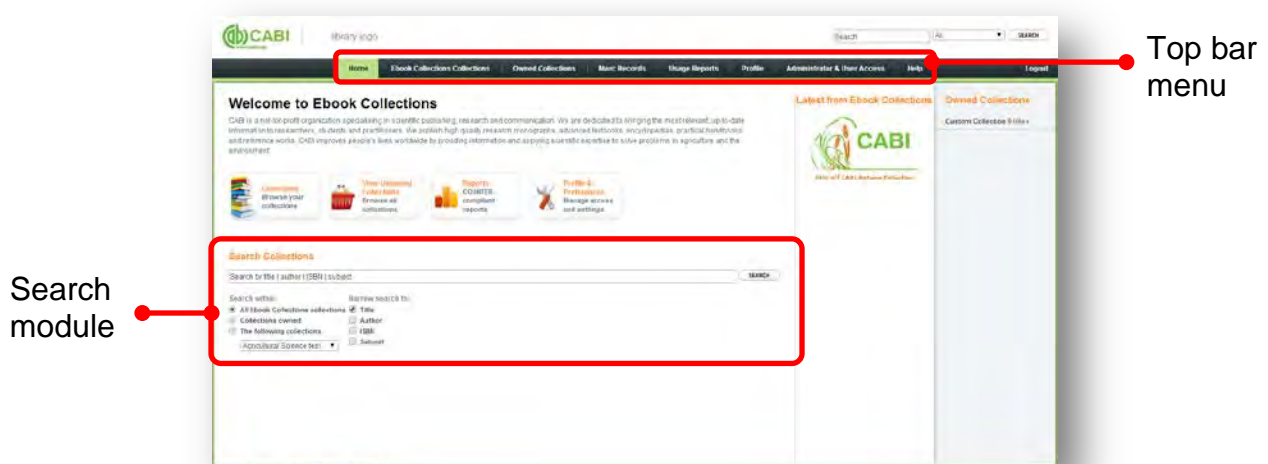
Each customer has their own unique URL landing page for both the Librarian and Patron portal.

To access the librarian portal visit your librarian portal URL and enter your administrator username and password as shown in the example below. For accounts that have recently purchase these collections access will be restricted to the primary administrator at the institution. The primary contact can then add other administrators to the account as mentioned in the [Creating librarian administrators section](#) later in the user guide.



Home page

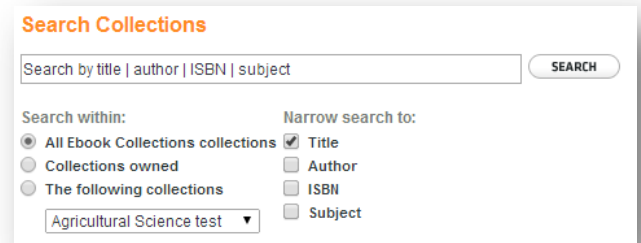
Once logged in to the librarian portal you will be directed to the home page. From here you can search for individual books within collections or link to the various pages via the top bar menu where you can perform common administration tasks.



Browsing collections

Searching for books

From the home page, searches can be conducted to view individual books in your institutions subscribed collections or to view eBooks which are available in other collections. Enter keywords in to the box to search across fields for title, author, ISBN (print or eBook) or subject (Library of Congress Subject Headings).



Search Collections

Search by title | author | ISBN | subject SEARCH

Search within:

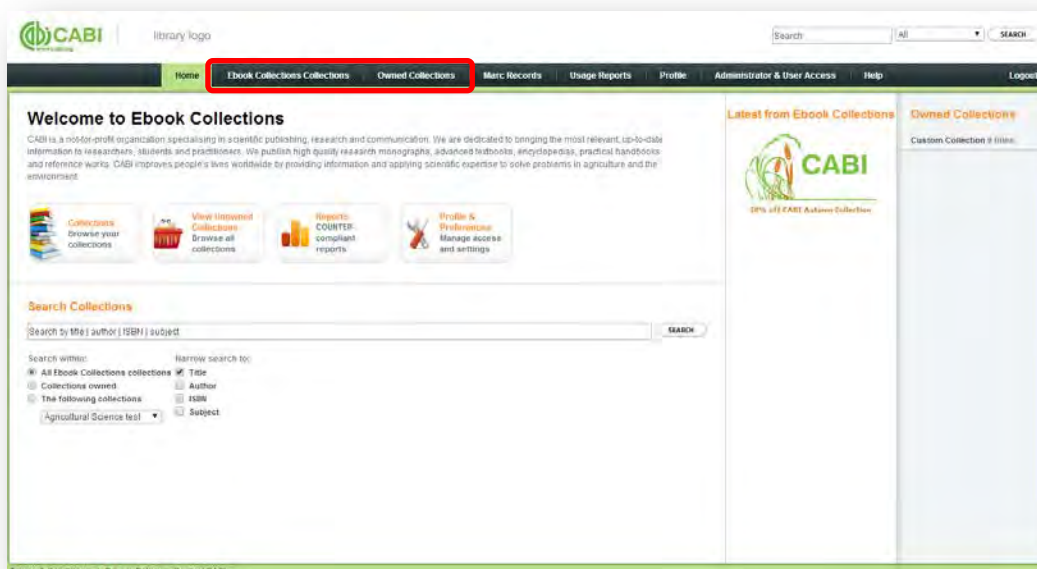
- All Ebook Collections collections
- Collections owned
- The following collections

Narrow search to:

- Title
- Author
- ISBN
- Subject

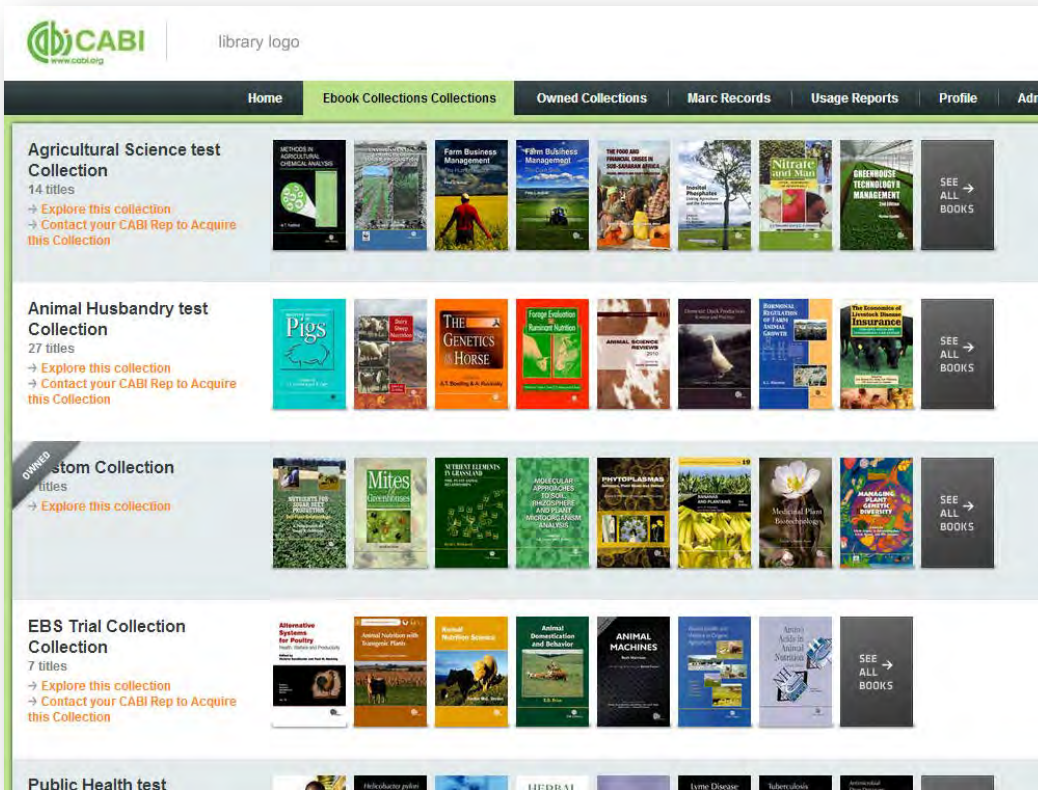
Agricultural Science test

To browse for books within specific collections click on the **Ebook Collections Collections** tab to view eBooks from all collections or the **Owned Collections** button to browse eBooks from your subscribed collections.



The screenshot shows the CABI library website home page. At the top, there is a navigation menu with tabs: Home, **Ebook Collections Collections** (highlighted with a red box), Owned Collections, Marc Records, Usage Reports, Profile, Administrator & User Access, Help, and Logout. Below the navigation, there is a "Welcome to Ebook Collections" section with a brief description of CABI's mission. To the right, there are sections for "Latest from Ebook Collections" and "Owned Collections". The "Owned Collections" section shows a list of collections, with one collection highlighted. Below the navigation, there is a "Search Collections" section with a search box and filters. The search filters are: Search within: All Ebook Collections collections (selected), Collections owned, The following collections (Agricultural Science test); and Narrow search to: Title (selected), Author, ISBN, Subject.

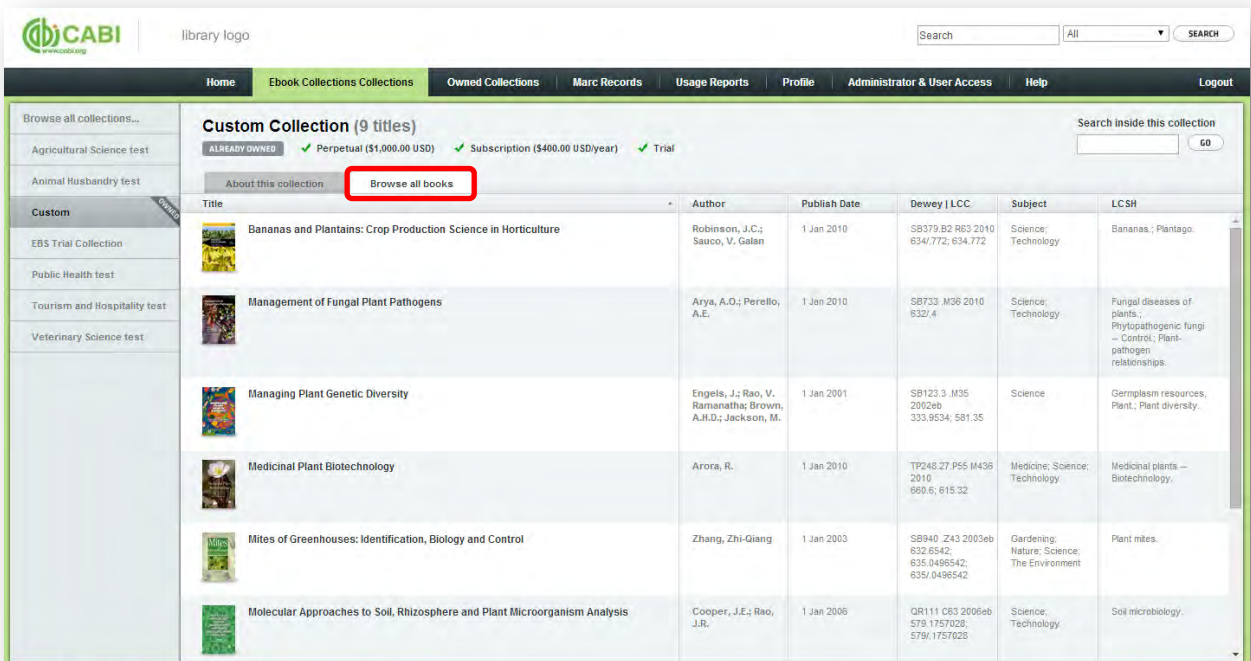
From this page, the owned ribbon indicates which subscription your institution is subscribed to. Once in this page to view further information on the books within specific collections click on the **→ Explore this collection** button. To enquire about collections you are not subscribed to click the **→ Contact your CABI Rep to Acquire this Collection**









The screenshot shows the CABI library homepage with a navigation menu and several eBook collections. The collections listed are:

- Agricultural Science test Collection**: 14 titles. Includes books like 'METHODS IN AGRICULTURAL CHEMICAL ANALYSIS', 'Farm Business Management', 'Fibre Business Management', 'THE FOOD AND FIBRE CROPS IN THE CANTON AREA', 'Nitrate and Man', and 'GREENHOUSE TECHNOLOGY MANAGEMENT'.
- Animal Husbandry test Collection**: 27 titles. Includes books like 'Pigs', 'THE GENETICS HORSE', 'Terry Estlin's Farm Business', 'ANIMAL SCIENCE', 'ANIMAL SCIENCE', 'ANIMAL SCIENCE', and 'The Economics of Livestock Insurance'.
- Custom Collection**: 9 titles. Includes books like 'Mites', 'WESTERN HEMANS', 'MOLECULAR APPROACHES TO SOIL, RHIZOSPHERE AND PLANT MICROBIOLOGICAL ANALYSIS', 'PHYTOPLASMAS', 'Medicinal Plant Biotechnology', and 'MANAGING PLANT GENETIC DIVERSITY'.
- EBS Trial Collection**: 7 titles. Includes books like 'Alternative Systems for Healthy', 'Animal Husbandry with Transport Plans', 'Animal Production Systems', 'ANIMAL SCIENCE', 'ANIMAL MACHINES', and 'ANIMAL SCIENCE'.
- Public Health test**: Includes books like 'Tuberculosis', 'Lyme Disease', and 'Tuberculosis'.

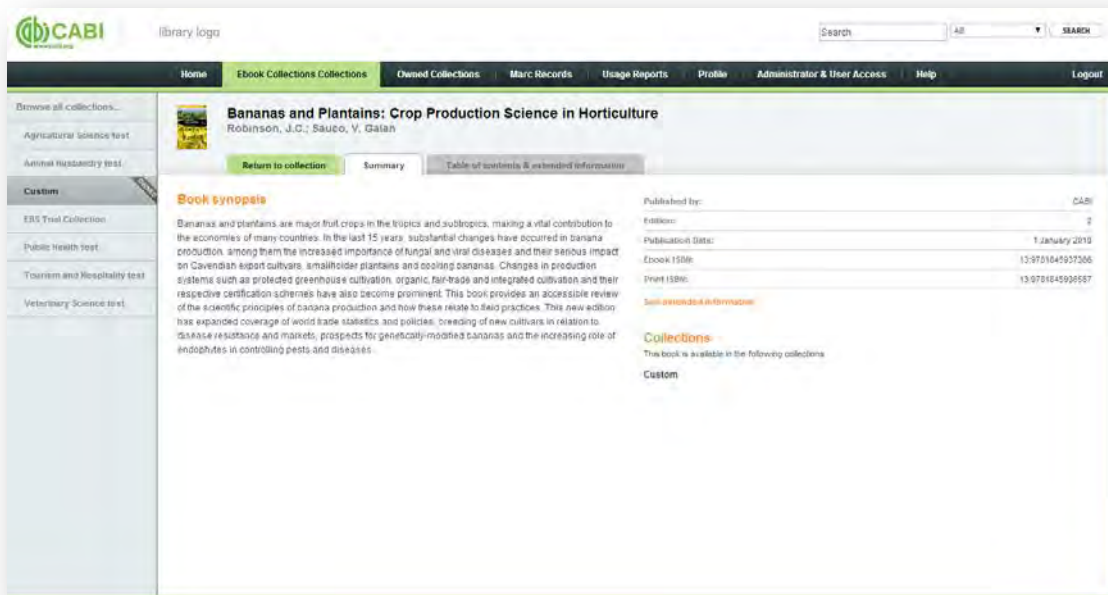
From the collection view you can then see a summary of key information for each title from the browse all books tab.



The screenshot shows the 'Custom Collection (9 titles)' view. A red box highlights the 'Browse all books' link. Below is a table of the collection's contents:

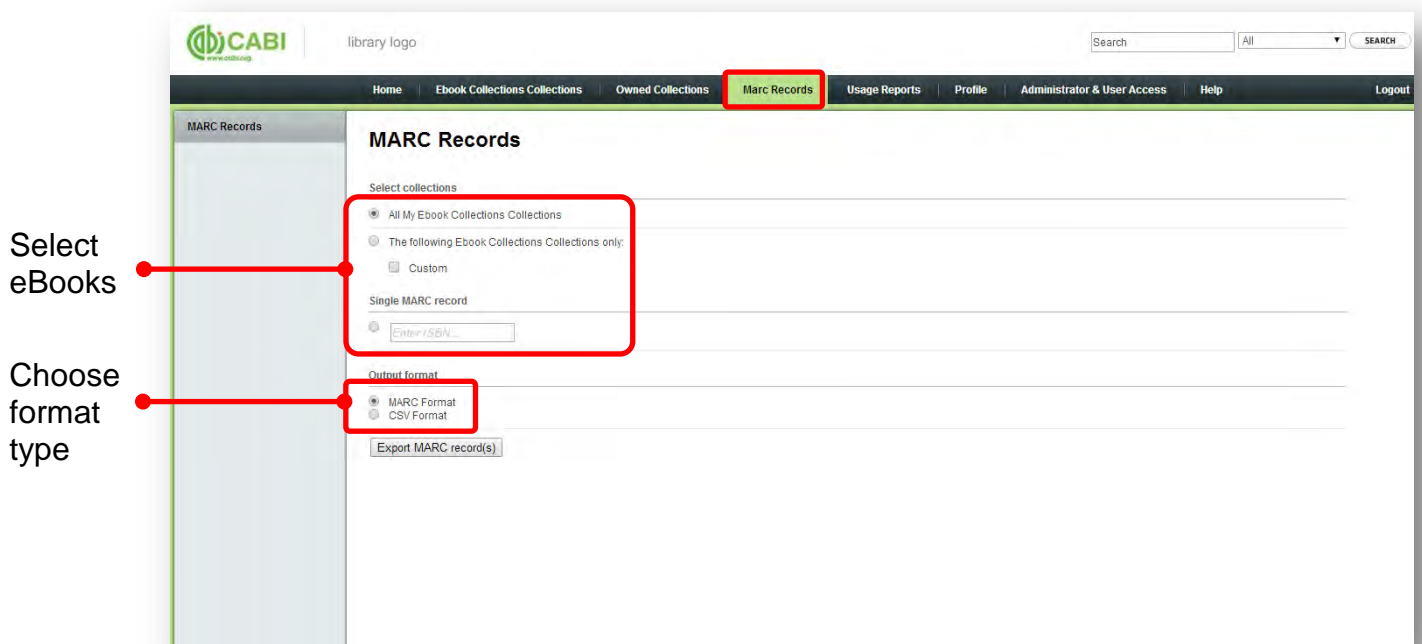
Title	Author	Publish Date	Dewey LCC	Subject	LCSH
 Bananas and Plantains: Crop Production Science in Horticulture	Robinson, J.C.; Saucedo, V.; Galan	1 Jan 2010	SB379.B2 R63 2010 634.772; 634.772	Science; Technology	Bananas; Plantago.
 Management of Fungal Plant Pathogens	Arya, A.D.; Perello, A.E.	1 Jan 2010	SB733 .M36 2010 632.4	Science; Technology	Fungal diseases of plants; Phytopathogenic fungi -- Control; Plant-pathogen relationships.
 Managing Plant Genetic Diversity	Engels, J.; Rao, V.; Ramenath; Brown, A.H.D.; Jackson, M.	1 Jan 2001	SB123 .3 .M35 2002eb 333.9534; 581.35	Science	Genplasm resources; Plant; Plant diversity.
 Medicinal Plant Biotechnology	Arora, R.	1 Jan 2010	TP245 .27 P55 M436 2010 660.6; 615.32	Medicine; Science; Technology	Medicinal plants -- Biotechnology.
 Mites of Greenhouses: Identification, Biology and Control	Zhang, Zhi-Giang	1 Jan 2003	SB940 .Z43 2003eb 632.6542; 635.0496542; 635.0496542	Gardening; Nature; Science; The Environment	Plant mites.
 Molecular Approaches to Soil, Rhizosphere and Plant Microorganism Analysis	Cooper, J.E.; Rao, J.R.	1 Jan 2006	QR111 .C63 2006eb 579.1757026 579.1757026	Science; Technology	Soil microbiology.

By clicking on an individual title in the collection view you can find further bibliographic information for that eBook as shown below.



Downloading MARC records

Click on the MARC records tab from the top bar menu. From here you can download MARC records for titles in all your collections, from specific eBook collections or by individual eBooks. MARC records can also be downloaded in MARC format or CSV format. Both exports will provide title information on eBook ID, ISBN, publication date, page count, Library of Congress subject headings and dewey decimal numbers, authors, title, synopsis and URL. Once you have made your selections click on the [Export MARC record\(s\)](#) button.



Downloading Usage reports

The librarian portal provides three different types of usage reports.

Standard usage reports: Will tell you the number of successful title requests by month and title. These reports can breakdown users who access eBooks via download or the online reader.

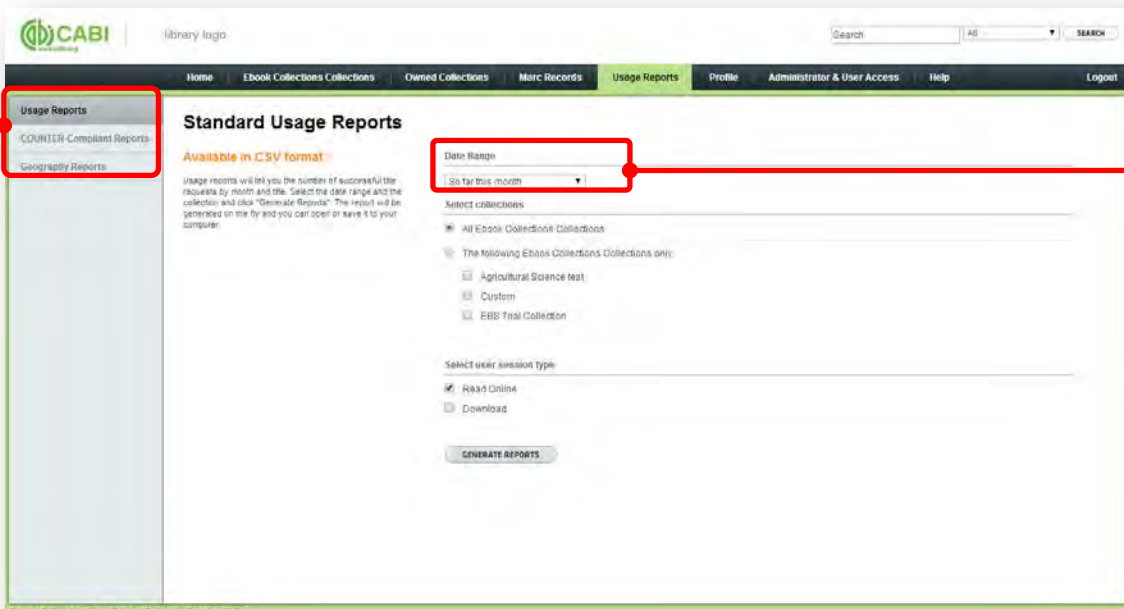
COUNTER-compliant usage reports:

Provide usage reports that are compliant to COUNTER industry standards. These include book report 1 (number of Successful Title Requests by Month and Title), book report 5 (total Searches and Sessions by Month and Title) and book report 6 (Total Searches and Sessions by Month)

Geographical reports: Useful for institutions with multiple sites. Reports can be generated to show individual country or by IP address.

To download the relevant usage report click on the report type in the left hand menu. Using the drop down menu, select the date range and click the **GENERATE REPORTS** button.

Choose format type



The screenshot shows the CABI Librarian Portal interface. The left-hand navigation menu has three options: 'Usage Reports', 'COUNTER Compliant Reports', and 'Geographical Reports'. The 'Usage Reports' option is highlighted with a red box and a red arrow pointing to the text 'Choose format type'. The main content area is titled 'Standard Usage Reports' and includes a 'Date Range' dropdown menu set to 'So far this month', which is also highlighted with a red box and a red arrow pointing to the text 'Select date range'. Below the date range, there are sections for 'Select collections' (with 'All Ebook Collections Collections' selected) and 'Select user session type' (with 'Read Online' selected). A 'GENERATE REPORTS' button is located at the bottom of the form.

Select date range

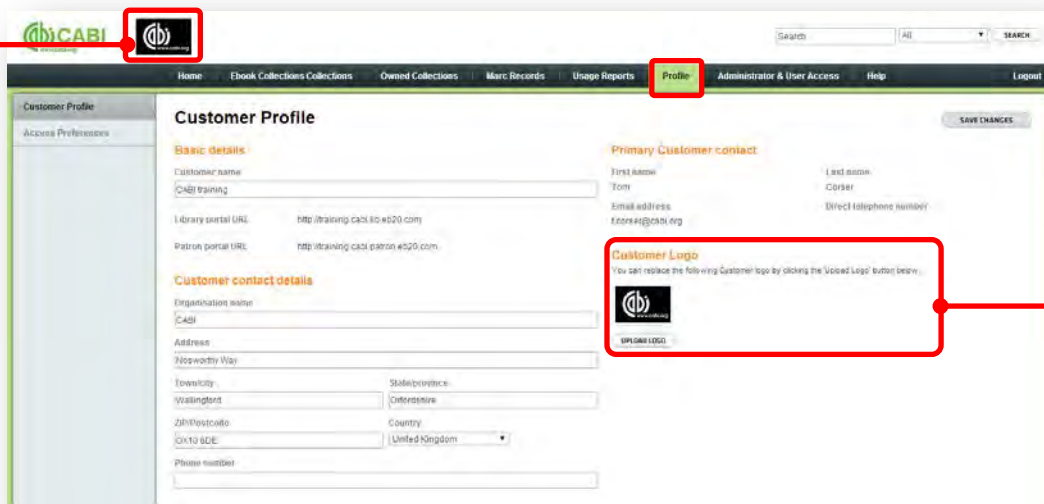
Customer Profile

The profile page allows the customers to amend institution names and contact details, check IP address ranges and customize accounts by adding institutional images.

Adding your institution's logo

From the profile page click the **UPLOAD LOGO** button and select an image from your system. A cropping tool allows certain sections of your image to be selected. Once assigned this library icon will appear in the top left corner of both the librarian and patron portals.

Library logo display



The screenshot shows the 'Customer Profile' page. The 'Profile' tab is selected in the top navigation bar. The 'Customer Logo' section is highlighted with a red box, showing a small logo and an 'UPLOAD LOGO' button. A red arrow points from the text 'Library logo display' to the logo in the top left corner of the page. Another red arrow points from the text 'Upload library image' to the 'UPLOAD LOGO' button.

Upload library image

Checking IP ranges

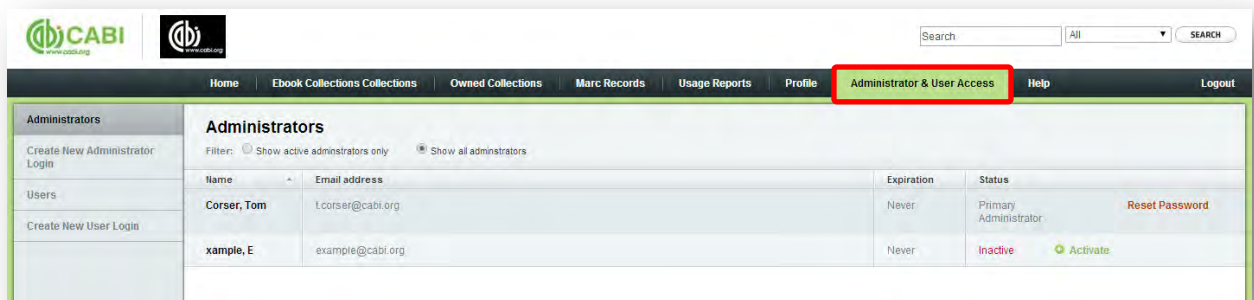
Whilst on the profile page select the **Access Preferences** button from the left menu. From here you will be able to view the IP ranges registered for your institution. If these are incorrect please contact support@cabi.org to amend.



The screenshot shows the 'Access Preferences' page. The 'Access Preferences' button in the left sidebar is highlighted with a red box. The 'IP Ranges' section is visible, showing a table with columns for 'From' and 'To' IP addresses. The table contains one entry: '192.168.32.00' to '192.168.32.65'. A red arrow points from the text 'Library logo display' to the logo in the top left corner of the page.

From	To
192.168.32.00	192.168.32.65

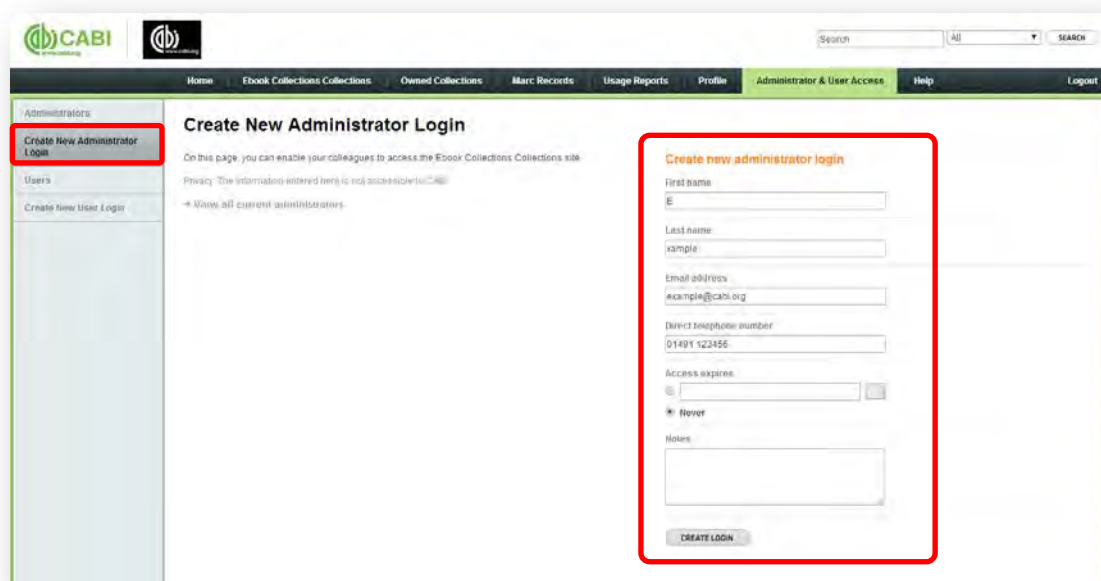
Access control settings



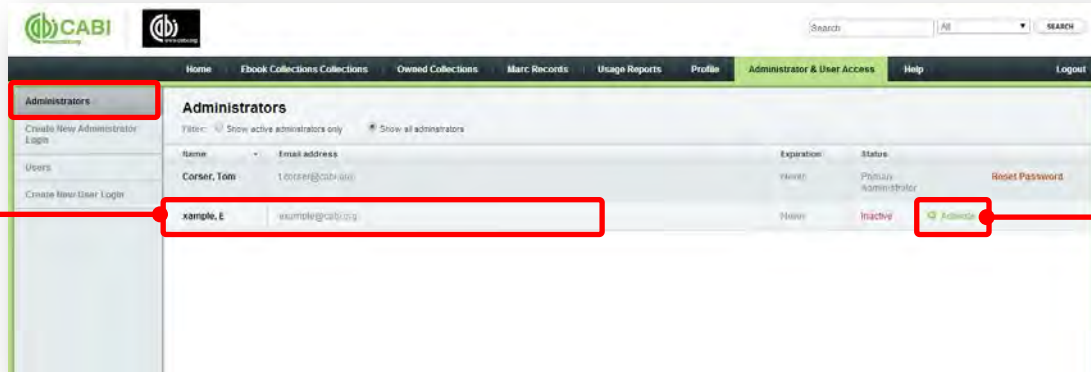
The administrator & user page allows the primary administrators to amend access control settings for both librarian staff for the librarian portal and individual end-users for the patron portal.

Creating librarian administrators

In order to allow library colleagues to access the librarian portal and perform the various administrative tasks for the eBook collections, the primary administrator must create a user login for them. To set-up a new administrator click on the [Create New Administrator Login](#) button from the left menu of the Administrator & User Access page. Enter your colleague's details in the fields on the right and click the [CREATE LOGIN](#) button.



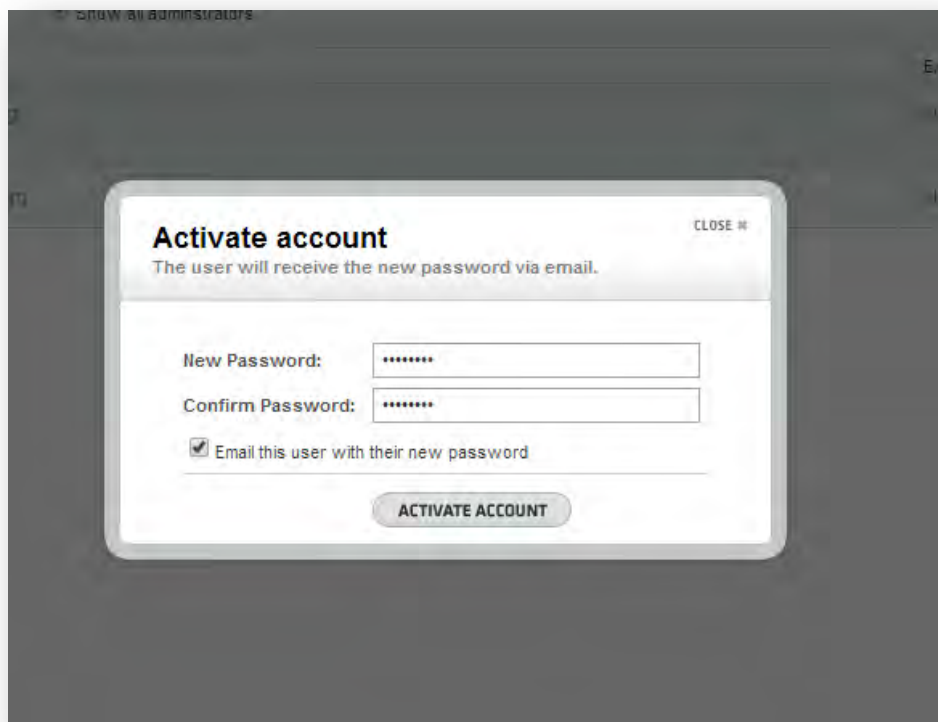
The Administrator & User access page from the left menu will then list this newly created administrator in the list. The status column indicates whether the administrator is active and can access the portal. To allow administrator to access the portal click the **Activate** button.



New administrator

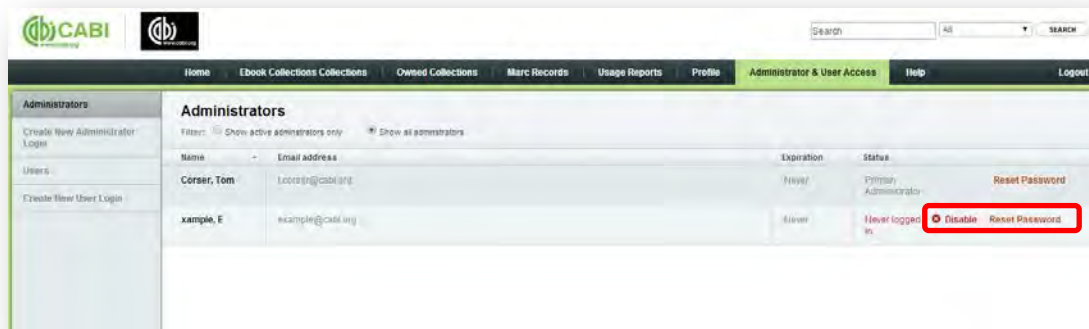
Activate administrator

A pop-up dialog box will appear. Assign a new password for your colleagues account and leave the email box checked so that a confirmation email will be sent to the new administrator with credential information when you click the **ACTIVATE ACCOUNT** button.



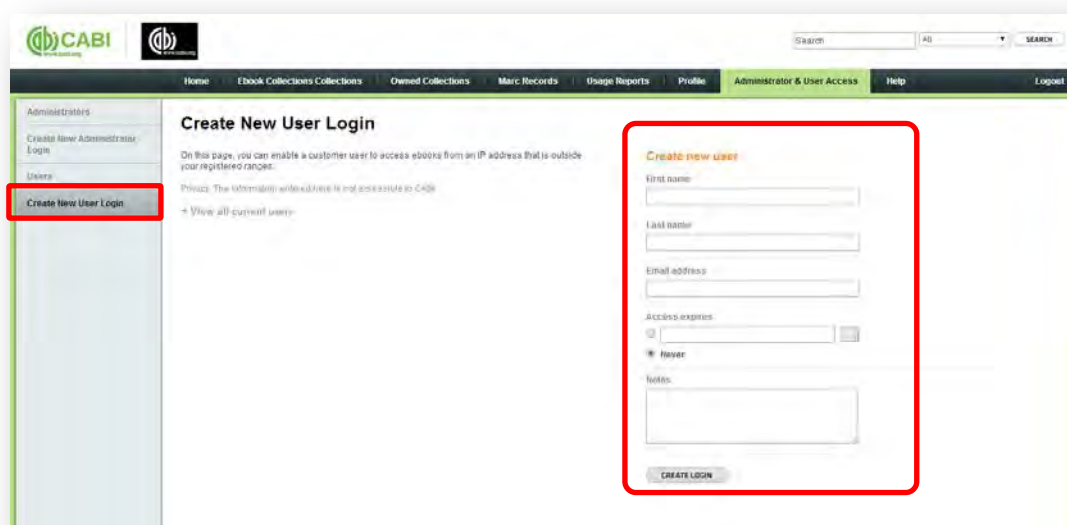
Amending administrator access

To cancel an administrator's access to the librarian portal simply click on the **Disable** button next to the relevant administrator. An administrator's password can also be reset and resent to the administrator by clicking on the **Reset Password** button.



Creating end-user accounts

For institutions that have a subscription with access controlled by IP ranges there may be a need to set-up individual end-users for off-site access to the eBook collections. To do this click the **Create New User Login** button from the left menu and enter the details of the new user in the fields presented.



To view new users that have these individual logins and to activate their account visit the **Users** page from the left menu and click the activate button following the same steps as activating a librarian administrator.

Appendix: DRM restrictions

	Online Reader	Downloaded eBooks
Printing	1 entire eBook then 20% every 30 days	20 pages of eBook every 30 days
Copying	5% of eBook every 30 days	20 pages of eBook every 30 days
Access	Unlimited	30 days before renewal