## Beginners Guide to LibCentral

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TRAINING@PROQUEST.COM

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#### **Presenters**



#### Jacqueline Stringer: Book Specialist and JISC contact

Get in touch if you would like to order print and/or ebooks and I will put you in touch with the relevant person to get you started

Jacqueline.stringer@proquest.com



#### <u>Ali Nazari-Nouri – Training and Consulting Partner</u>

training@proquest.com

### **Session Objectives**

#### At the end of the session, you will be able to

- Understand terminology used within LibCentral
- Manage basic functionality of LibCentral and manipulate settings to suit your institution
- Generate usage summaries and reports

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#### What is LibCentral

LibCentral saves librarians' time by combining the process of finding and selecting ebooks with evaluating usage and budget practices into one, productive experience.





LibCentral is the admin portal of Ebook Central. Librarians can use any combination of acquisition models to choose from more than one million titles from hundreds of publishers on dozens of subjects, assign access to those ebooks, and run reports to determine what's working and what isn't.

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### Login to LibCentral

- Login to your own LibCentral using this URL (don't forget to add your own site ID)
- <u>https://<site-id>.ebookcentral.proquest.com/libcentral/</u>

Insert your username and password here	Username	Contact your administrator or <u>support.proquest.com</u> if you need your site ID
	Password Login Forgot your username/password? Contact Support	You can click this link if you have forgotten your username or password

#### LibCentral Dashboard

- Tabs across the top to access all workflows in LibCentral
- Patron account requests or requests for item purchases appear here for librarian approval
- All of the library's holdings are accessed here under 'Your Content'







## **Glossary of terms**

- ISBN International Standard Book Number is a unique number assigned to each separate title (including each edition or variation)
- eISBN electronic International Standard Book Number is an ISBN assigned to ebooks
- Document ID the unique number assigned to each item in Ebook Central
- DRM or DRM-free Digital Rights Management is a digital lock which assists in copyright management while DRM-free does not have the digital limits and can be distributed as needed
- MARC Machine-Readable Catalogue are a set of digital formats for the description of items catalogued by libraries

#### **Glossary of terms – Access Models**

#### Non-Linear (NL) access model

Under this model, titles are not restricted to linear distribution - one patron at a time - but rather they can be lent to any number of patrons concurrently. The number of days used for each loan instance is subtracted from the total number of annual loan days set for the title - usually 325.

For example, if four patrons each trigger a ten day loan for the same title, 40 days are deducted from the title's 325 loan days.

The combined number of loan days cannot exceed the annual loan days in a year. Loan days renew on the anniversary of purchase, at no additional cost. The library is able to control patron access to titles with expired loan days. Automatic email alerts can be configured to notify the library when a Non-Linear title has a limited number of loan days are remaining.

#### 1-user (1U) access model

One person can access the ebook at a time. Librarians are provided with options such as reserving an online access by setting download days to zero for individual 1-user titles that are in high demand. Chapter Download is always available, even if full Download has been disabled.

#### 3-user (3U) access model

The 3-user access model restricts access to three concurrent users. A user is a patron accessing the title in the Online Reader or with an active download of the title.

Access to 3-user titles can be managed by preserving Online Reader access for one, two or all users.

If a library owns multiple copies of a 3-user title, the number concurrent users is multiplied accordingly. For example, if the library owns two copies of a 3-user title, six patrons can access the title concurrently.

#### Unlimited (UA) access model

This access model allows titles to be available on an unlimited access basis. Any number of patrons can access Unlimited titles concurrently for any number of days per year, acccording to the download options set by the library. The pricing of this model reflects the unlimited access of the model.

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# Searching for books



## **Searching for books**



- Search can take place from the dashboard or from the Advanced Search page
- Search using Title, Author, Keyword, ISBN, Publisher, Subject, Publication Date fields; by Price; or by License Model



# Purchasing or Upgrading titles

#### Purchasing a title – Add to Cart

Purchase an item by clicking on 'Add to Cart' or 'Quick Purchase' next to the relevant licence type.

Classrooms in the Real World : Practical Advice from a Mandel, Scott



Preview	Table of Conte	nts			
Document	ID: 6012550				
Full Down	oad: PDF				
Perpetual/	STL Allowances	: Print: <b>40%</b> C	opy: <b>20</b>	%	
ATO: Fron	itlist				
Document	Type: Book				
MARC:Fu	II Marc, Express	s Marc Expo	rt MAR	0	
Price:					
NL: €	{325 days}	Add to Cart	Quick Pu	urchase	
UA: €	{Unlimited}	Add to Cart	Quick Pu	urchase	
3U: €	{3 users}	Add to Cart	Quick Pu	urchase	
1U: €	{1 user}	Add to Cart	Quick Pu	urchase	
Short Tern	Loan Prices:				
1 day S	TL 7 day STI	2 week	STL	4 week	STI
€.	€	€′		€	
	All prices are e	exclusive of any ap	oplicable ta	x	

#### Add to Cart

Will add the item to your cart and you can purchase as you would on Amazon or any online retailer. Click 'Order Review' to see the Cart and finalise your order.

Settings 🗸	Users 🗸	Reports 🗸	Your Cart 1	Help	) Log C	Put
Cart contai	ns 1 items <b>Total</b>	<b>Cost: €</b> 232.52	Clear Cart Viev	v As List	🍃 Order Revie	ew
Home » Order Re	view					
Order Revi	ew					
Titles Su Cart Cont	immary ains 1 Items	1 x Non-Linear			Sort By:	Title
Clear Cart	Export					
		Title	F	Fund Code	Quantity	Price
Conte Stude Routled eISBN:	<b>mporary Clima</b> <b>nt Primer</b> ge   2019 9780429821158	te Change Deb	ates : A	Modify	1 Update	€

#### **Purchasing a title – Quick Purchase**

Purchase an item by clicking on 'Add to Cart' or 'Quick Purchase' next to the relevant licence type.

Classrooms in the Real World : Practical Advice from a Mandel, Scott



Add to List

Preview	Table of Contents					
Document	ID: 6012550					
Full Down	oad: PDF					
Perpetual/	STL Allowances:	Print: 40% C	opy: <b>20</b>	%		
ATO: From	tlist					
Document	Type: Book					
MARC:Fu	ll Marc, Express	Marc Expo	rt MAR	С		
Price:						
NL: €	{325 days}	Add to Cart	Quick P	urchase		
UA: €	{Unlimited}	Add to Cart	Quick P	urchase		
3U: €	{3 users}	Add to Cart	Quick P	urchase		
1U: €	{1 user}	Add to Cart	Quick P	urchase		
Short Tern	Loan Prices:					
1 day S	TL 7 day STL	2 week	STL	4 week	STL	
€.	€	€´		€		
	All prices are ex	clusive of any ap	plicable ta	ax		

#### **Quick Purchase**

This will bring up a box to allow you to purchase immediately. The fund code box is optional.



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## **Upgrading** a title

#### Upgrading a title

Fur

You can upgrade a title by using the 'Add to Cart' and 'Quick Purchase' options. You will pay the difference between your current licence and the upgraded licence.

Classrooms in the Real World : Practical Advice from a Mandel, Scott

Table of Contents

	Preview
50	Documer
	Full Dowr
	Perpetua
3.00	ATO: Fro
	Documer
Real World	MARC:FI
Practical Advice prom a Veteran Teacher	Price:
SCOTT M. MANDEL	NL:€
	UA: €

Add to List

€.		€	€́		€	
1 day S	STL	7 day ST	L 2 week	STL	4 week	STL
Short Ter	m Loa	an Prices:				
1U: €	{1	user}	Add to Cart	Quick F	Purchase	
3U: €	{3	users}	Add to Cart	Quick F	ourchase	
UA: €	{U	nlimited}	Add to Cart	Quick F	Purchase	
NL:€	{32	25 days}	Add to Cart	Quick I	Purchase	
Price:			_			
MARC:FI	ull Ma	rc, Expres	s Marc Expo	rt MAF	RC	
Documer	nt Type	e: Book				
ATO: Fro	ntlist					
Perpetua	I/STL	Allowances	s: Print: <b>40%</b> C	opy: 20	0%	
Full Dow	nload:	PDF				
Documer	nt ID: (	6012550				

All prices are exclusive of any applicable tax

Your library owns a copy of this title.

You can purchase an additional copy or upgrade to this access model.

Upgrade price: €17.49 Upgrade fee: €0.00

id Code:				
	Upgrade	Purchase	Cancel	
		-		Ŧ

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### MARC records



### MARC records – individual downloads

- Available in individual item detail pages
- Click on 'Export MARC'
- Choose your preferred MARC format
- Either Download, or send to a designated email address

Classrooms in the Real World : Practical Advice from a Mandel, Scott

22	Preview	Table of Conten	its		
Classrooms IN THE Real World Practical Advice /rom a Veteran Teacher	Document Full Downl Perpetual/ ATO: Fron Document MARC:Ful	ID: 6012550 oad: PDF STL Allowances: tlist Type: Book I Marc, Express	Print: <b>40%</b> C Marc Expo	Copy: <b>20%</b> ort MARC	
• SCOTT M. MANDEL	Price: NL: €63.43	3 {325 days}	Add to Cart	Quick Pur	chase
Add to List	3U: €79.29 1U: €63.43	) {3 users} } } {1 user}	Add to Cart Add to Cart Add to Cart	Quick Pur Quick Pur Quick Pur	chase
	Short Term	Loan Prices:	2 week	STL	4 week STL
	€19.02	€25.37	€31.7	2	€47.57

All prices are exclusive of any applicable tax

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### MARC records – individual downloads

- Available in individual item detail pages
- Click on 'Export MARC'
- Choose your preferred MARC format
- Either Download, or send to a designated email address

Classrooms in the Real World : Practical Advice from a Mandel, Scott

MARC Doc ID: 607	Export 12550
File Type:	<ul> <li>Full MARC (MARC8)</li> <li>(Express MARC8 supplied when Full MARC not available.)</li> <li>Express MARC (UTF-8)</li> <li>Express MARC (MARC8)</li> <li>Express MARC (XML)</li> <li>.CSV</li> </ul>
Delivery:	O Download   Email
The informati	on provided here will only be used to fulfill your request.
	Export

All prices are exclusive of any applicable tax



#### **MARC records - updates**



MARC Record Set	Update Frequency	Last Update	Next Update	New Updates
Subscribed and/or Owned	Monthly	2020-02-28	2020-03-28	Yes

 New updates column indicates if you have new MARC records to download

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#### Librarian Accounts & Permissions

### **Manage Librarian Accounts**

	Collections 🗸	Settings 🗸	Users 🛩	Reports 🛩	Your Cart 1	Help	Log Out
			Manage Patro	ons			
			Manage Libra	rians			
		Advance	Librarian Perr	missions	Topics		
			Patron Accou	nt Requests	THE		
_			Patron Analyt	ics			





### **Manage Librarian Accounts**

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Manage Librarians

- Add or delete librarian accounts
- Login details are not automatically sent to the recipient, so be sure to record these details

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Manage Patrons	Search:	Name or Email	
Manage Librarians	Last Login Date:	start (yyyy-MM-dd) end (yyyy-MM-dd)	Search
Librarian Permissions			Add new Librarian Delete Selected Librarians
Patron Account Requests	View Status: All	View Admin: All Visplay: 10 V resu	
	Displaying results	1 to 3 of 3 librarians	

First Name	Last Name	Username	Email	Librarian Type	Last Login Date	Expire Date	Status	Delete
David	Ong	davidong	david.ong@accessdunia.com.my	Head Librarian	Never	Never	Active	
Taani	Lin	taani.lin@proque st.com	taani.lin@proquest.com	Head Librarian	2018-12-06	Never	Active	
Ebook Central	Support	demo-tlin	RSC-Ebrary-TechnicalSupport@pr oquest.com	Head Librarian	2017-10-09	Never	Active	Cannot delete default librarian

Export: Download Comma Separated V

ProQuest

Go

#### **Manage Librarian Accounts**

Collections 🗸 🦷 Settings 🗸	Users 🗸 Reports 🗸	Your Cart 1	Help	Log Out
	Manage Patrons			
	Manage Librarians			
Advanc	Librarian Permissions			
	Patron Account Requests	THER		
	Patron Analytics	ATT B		





#### **Librarian Accounts & Permissions**

- Users tab -> Librarian
   Permissions
- A librarian account must be associated with a set of permissions

Permission ID	Permission Type	Status	Delete
HD Lib	Head Librarian	Active	Cannot delete default librarian type
Sub	Sub	Active	
order-only	Ordering only	Active	Cannot delete default librarian type

 Permissions allow different librarians to have different access options to LibCentral

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Delete Selected

Add Permission

## **Editing Librarian Permissions**

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- Create permissions based on different librarian workflows and positions
- Permissions that are set to "No" provides "View Only" access

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Details	Profiles:	Patrons:				
Permission Name:	Can Submit Profile Changes:	Can Create Patron Account:	🖲 Yes 🔵 No			
Acronym:	Settings:	Can Delete Patron Account:	🖲 Yes 🔵 No			
Acquisition:	_	Can Edit Patron Account:	Yes No			
Can Add to Cart:	Can Update Ebook Visibility:	Can Earl Parlon Account.				
Can Place Orders:	Can Modify System Settings:	Can Approve/Reject Account Request:	🖲 Yes 🔵 No			
Mediate Requests:	Can Modify IPs:	Can Modify Patron Analytics Settings:	🖲 Yes 🔵 No			
Can Approve/Reject STL Request	our mouly if o.	Librarians:				
Can Approve/Reject Purchase Requ	Can Create/Modify Access Permissions	Can Create Librarian Account:	🖲 Yes 🔵 No			
Lists:	Can Modify Alerts:	Can Delete Librarian Account:	🖲 Yes 🔵 No			
Can Create Lists:	Can Add Fund Code:	Can Edit Librarian Account:	🖲 Yes 🔵 No			
Can Add to Lists:	Can Modify Fund Code:	Can Create/Edit Librarian Permissions:	🖲 Yes 🔵 No			
Can Delete Lists:	Can Modify Custom Text:	Can Change Librarian Password:	🖲 Yes 🔵 No			
Can Modify Lists:		Reports:				
	Can Archive Ebook:	Can access all Reports:	🖲 Yes 🔵 No			





#### **Generating Alerts**







### **Generating Alerts**

- Librarians can be alerted on a number of workflows
- Alerts are sent to the registered email address associated with LibCentral account
- Patrons can also be set up to receive alerts

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Library Alerts				
View/Edit Alert	Recipients	Details		
Order Confirmation	Taani Lin	Sent when an ebook order is processed (not autopurchase).		
Autopurchase Alert		Sent when an autopurchase occurs.		
Automatic Upgrade Alert		Sent when an automatic upgrade has occurred.		
Short Term Loan Alert		Sent when the defined number of Short Term Loans have occurred for an ebook.		
ATO Loan Alert		Sent each time an ATO Loan has occurred for an ebook.		
ATO Purchase Alert		Sent each time an ATO Purchase has occurred for an ebook.		
Mediated Request Alert	Taani Lin	Sent when a patron has requested a STL or a purchase.		
Loan Days Remaining Alert	Taani Lin	Sent when the defined number of loan days remaining is reached for an ebook owned in the Non- Linear access model.		
Turnaway Alert	Taani Lin	Sent when a turnaway occurs.		
Patron Account Request Alert	Taani Lin	Sent when a patron requests a Ebook Central account.		
New Patron Account Alert		Sent when a patron creates an Ebook Central patron account. (Only available when library permits patrons to create accounts)		
Patron Alerts				
View/Edit Alert	Details			
Join/Create Account	Sent to patron wh	nen their patron account has been created.		
Request Account approved	Sent to patron when a patron account request is approved.			
Request Account rejected				
Request Book approved				
Request Book rejected				



# Usage Reports



#### **Generating Reports**







### **Generating Usage Reports**

- There are 2 types of LibCentral usage reports:
- 1) The Title Report

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- 2) The Usage Report
- Title and Usage Reports have some overlap

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Search				
Title:	has all of			
Keyword:	has all of			
ISBN (multiple):				Use commas, semicolons or spaces to separate
Document ID (multiple):				Use commas, semicolons or spaces to separate
Username:				
IP address:				
List:		Select a list	T	
Collection				
Search				
Publisher				
Search				
Subject				
Select				
Publication Date				
From:	То:			

#### **The Usage Report**

 Enter usage dates and leave other fields as default to generate a basic usage report

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Usage Date
From: To:
Purchase Type (at the time of use)
Show All Autopurchase STL Upgrade Ebook (firm orders) Subscription ATO Loan ATO Purchase
Access Model (at time of use)
Show All I-user IS-user INon-Linear IUnlimited IDDA (not owned)
Use Type
🗹 Show All 🔲 Non-Linear Loan 🔲 Non-Mediated STL 📄 Mediated STL 📄 Free Viewing 🔲 Non-Mediated ATO Loan 📄 Mediated ATO Loan
Trigger Events
Show All View Time Copy Print Chapter Download Book Download
Filters
Visible titles only Reader use only Trigger Events Only DRM Free Use Only

#### **The Usage Report**

 For a more comprehensive report, export to an excel spreadsheet

 Generate a usage summary for additional information from the usage report

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Usage Re	port	Please Note: Recen	it usage can take	e up to 5 m	inutes to appear in	this report.								8			
126 results fou	nd   Now show	ing page 1 of 13   I	New Search   Mo	odify Searc	h							Г	View Su	mmar	у	Export	»
Time Zone: U	JTC+10	▼ Display: 10	Results V	D. I.D		<b>6</b> 11-1	10-16-16	<b>-</b> -	lu c b			dRe	eader Du	iratio	nU	lsernam	e art
2018-10-17 11:10	3041006	Education	Walter de Gruyter GmbH	1992- 01-01	9783110970890	Library Science	VISIDIE	Trigger Event	Sub	nase Type	Access Model Subscription		00:06:	47		Patron	n
2018-10-05 11:13	775390	African Anarchism : The History of a Movement	See Sharp Press	2011- 05-01	9781884365959	Social Science; Political Science			Sub	bscription	Subscription		00:00:	02		Patron	n
2018-10-05 11:12	3041006	Education	Walter de Gruyter GmbH	1992- 01-01	9783110970890	Library Science			Sub	bscription	Subscription						n
2018-08-07 13:29	5476959	Environmental Chemical Analysis	Chapman and Hall/CRC	2018- 07-27	9780429857034	Engineering: Environmental; Science; Engineering; Science: Biology/Natural History	Yes						00:00:	19		Patron	n
2018-08-07 12:59	5475786	Refractory Technology : Fundamentals and Applications	Chapman and Hall/CRC	2016- 11-03	9781498754262	Engineering: General; Engineering; Engineering: Chemical						Free View				00:00:04	Patron
2018-08-07 12:36	5475786	Refractory Technology : Fundamentals	Chapman and Hall/CRC	2016- 11-03	9781498754262	Engineering: General; Engineering; Engineering: Chemical						Free View				00:00:00	Patron



### **The Usage Summary**

- Usage Summary provides additional information to the usage report and can also be exported to Excel
- Top 5 Most Used Titles provides additional insight to user behaviour

Usage Summary	Export	Total Unique Users (Subscribed Usage):	2
Total Titles Used	45	Top 5 Most Used Titles	
Total STLs:	3	Let Your Life Speak : Listening for the Voice of Vocation	19
Total ATO Loans:	0	Extreme Teaming : Lessons in Complex, Cross-Sector Leadership	9
Total NL Loans:	10	Management Information Systems	8
Total Unique Users:	7	Advanced Micro-Device Engineering IV	6
Total Book Downloads:	33	Inpatient Cardiovascular Medicine	4
Total Unique Users (Book Downloads):	2	Top 5 Most Used Subjects	
Total Chapter Downloads:	10	Policion	22
Total DDA Uses:	17	Religion	32
Total Unique Users (DDA Usage):	1	Business/Management	22
Total Owned Titles:	13	Medicine	7
Total Unique Users (Owned Usage):	5	Engineering; Engineering: Electrical	6
Total Subscribed Titles:	23	Economics; Business/Management	3



# Download Days



## **Managing Download options**







#### **Review Download Day Options** 3.download

General

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- The number of days a patron can download to Adobe Digital Editions can be customised in "Access Permissions"
- Preserve online only copies for 3U and 1U titles, effectively creating a "reserve copy" in the online library

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#### Education

	er eneren det 1000-tenn Armelen Det 1000-tenn Armelen	Author: Joy Foskett , and Douglas Foskett
	CLASSIFICATION	Length:108 pages
		File Size: 2790K (2.7MB)
		DOWNLOAD PERIOD: Select
		DOWNLOAD FORMAT: Select 1 day 7 days 14 days 21 days 21 days
General Owned DDA		Need Help?
Online Reader Loan Days:	Non-Linear 1	Separate values with comma to set multiple days (eg:1, 7, 14)
Download Days:	Non-Linear 1,2,3,7	Unlimited 1,7,14,21 Subscription 1,7,14,21
	3-user 1,2,3,7	Preserve 3-user reader access for: 1 USEr
	1-user 1	Preserve reader access for one user if multiple copies of a 1-user title are owned Do not allow downloads when only one copy of a 1-user title is owned



### Non Linear Online Reader Loan Days

- Non-Linear titles will trigger a loan after 5+ minutes viewing, copy/print or a chapter/full download
- In example: after any of the trigger events, the patron will take out a 1 day loan

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 Online reader trigger is recorded because a non-linear title needs to count down loan days

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AUTHOR:	Review, Harvard Business
LENGTH:	261 Pages
FILE SIZE:	1172K (1.1MB)
LOAN LENGTH:	expires in 0 day(s) and 23 hour(s).
LOAD FORMAT:	EPUB  PDF





#### To Recap...

#### • You should be able to now:

- Understand terminology used within LibCentral
- Manage basic functionality of LibCentral and manipulate settings to suit your institution
- Generate usage summaries and reports





#### **Help Documents**

ProQuest® LibCentral	Colle	tions 🔻	Settings 🔻	Users 🔻	Reports 🔻	Your Cart 3	Help
ome » Help							
ibCentral Help &	Support						
FAQ	Frequently Asked Questions						
Collections Settings	How are ebooks accessed?						
Users	Ebook titles can be accessed through a library's OPAC usin URL to the catalog. Our titles are also indexed in most maj	g an 856 r federate	link in a catalog ed search and d	record or via	a general ices.		
Reports	Users can perform simple and advanced searches within th	e Patron i	interface, includ	ing full-text se	earches.		
Glossary	See the Access Permissions guide for further information.						
Help Documents							
Support	Do library patrons need a username and password t	access	s ebooks?				





### **Additional Resources**

- Ebook Central LibGuide
- Ebook Central JISC FE LibGuide
- <u>Technical Support</u>
- <u>Ebook Central Support Center</u>
- Contact <u>training@proquest.com</u> for customised sessions or special requests





## **JISC Support**

- Jisc e-books for FE support site: <u>https://support.ebooksforfe.jisc.ac.uk/</u>
- Jisc e-books support email: <u>content.feandskills@jisc.ac.uk</u>

#### Who to contact with e-books queries

- For all queries regarding content, usage statistics, please contact Jisc at <u>content.feandskills@jisc.ac.uk</u>
- For all queries regarding account information, updating usernames and passwords, availability of MARC records, updating merger information please contact <u>ebooksupport@proquest.com</u>

