Kortext

Est 2013

Kortext adopt
Publisher administrator guide

Table of contents

www.kortext.com

Table of contents

Dashboard

To view high-level information about customers and content in your dashboard, ensure you are logged in to your publisher administrator account.

Your dashboard is the first place you will land after you log in to **adopt** from <u>this page</u>, but you can also get there from elsewhere in **adopt** by clicking on the **Dashboard** button from the left navigation menu.

Your dashboard consists of three components (or 'cards'):

> **Customers:** the number of customers that you have currently available in **adopt**.

> **Books:** the number of books you have set up across your customers.

> **Licences:** the number of active licences you have provisioned across your customers.

You can click on the **View details** link in each of these cards, and they will deliver you to the **Customer manager** page.
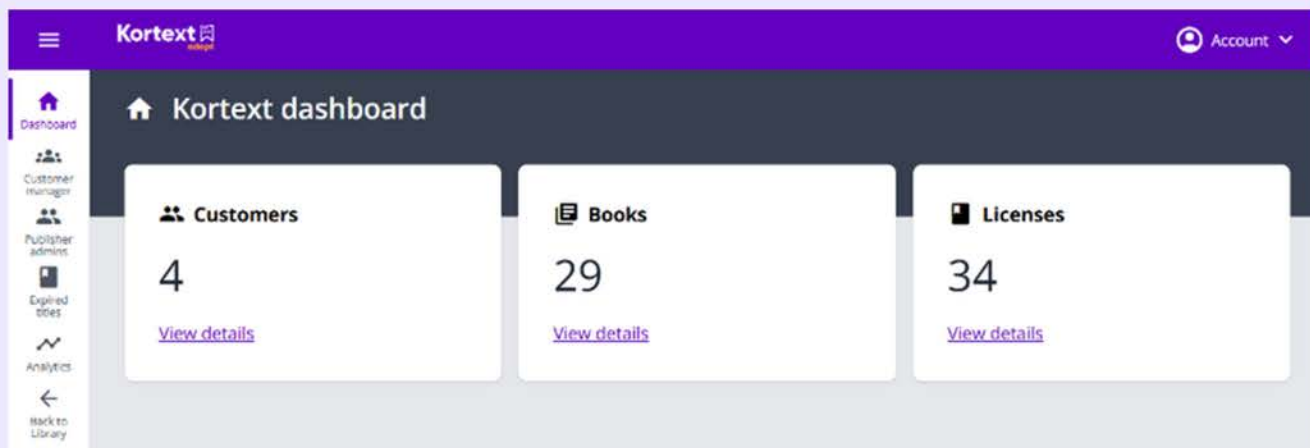
Customer manager

The **Customer manager** page contains a list of the customers you have currently available in adopt. You can navigate to the customer manager page by clicking the **View details** link on any of the cards in your dashboard, or by clicking the **Customer manager** button from the left navigation menu.

1. Click the **Customer manager** button from the left navigation menu.
2. In the top-right corner, click the **+ Add customer** button.
3. In the **Add customer** form, fill in the required fields marked with an asterisk * (listed below).

a. Customer name

b. Address line 1

c. Country name

d. State name

e. Zip code

f. Allowed email domains

4. Click **Save**.

The **Allowed email domains** field can be addressed in one of three potential ways:

- Allow all email domains by adding an asterisk *
- Limit allowed email domains to one by inputting the single allowed domain
- Limit allowed email domains to multiple specified options by adding each domain separated by a comma, as shown below:

universityA@ac.uk,universityB@ac.uk,universityC@ac.uk

After you've saved your work, you'll be brought back to your **Customer manager** page.

The customer you've just added will be visible on your list, with the **Institution ID** marked as 0 and the **Status** marked as unverified.

Adding a new customer

Kortext is automatically notified when you save a new customer. A Kortext administrator will verify the customer and complete the set-up.

You will know the set-up is complete when you receive an email from no-reply@kortext.com to notify you that the new customer has been created.

After verification, you will find that your newly added customer has a unique **Institution ID** assigned and the **Status** has moved to **Verified**.
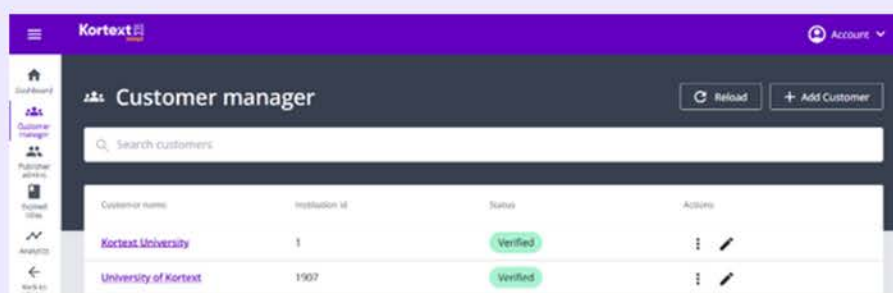
Please note that you can only view the **Customer dashboard** after a Kortext administrator verifies the customer. You cannot add books, licences, or users until the set-up is complete.

Editing a customer

Should you wish to edit some information about a customer:
1. Locate the customer on the **Customer manager** page.
2. Click the **Edit customer** button in the **Actions** column.
3. When the **Edit customer** page appears, make your desired edits (please note that the **Institution ID** cannot be edited after verification).
4. Click **Save**.

Deleting a customer

Should you wish to delete an unverified customer, please contact our support team via email. This is a permanent action and cannot be undone.

Searching for a customer

To locate a customer in the **Customer manager** page, you can use the **Search customers** field at the top of your page to narrow your results or sort the **Customer name** column alphabetically.

When you've located your customer, you can view the **Customer dashboard** by clicking on the **Customer name** or clicking the vertical ellipsis button in the **Actions** column, then selecting **Customer dashboard**.
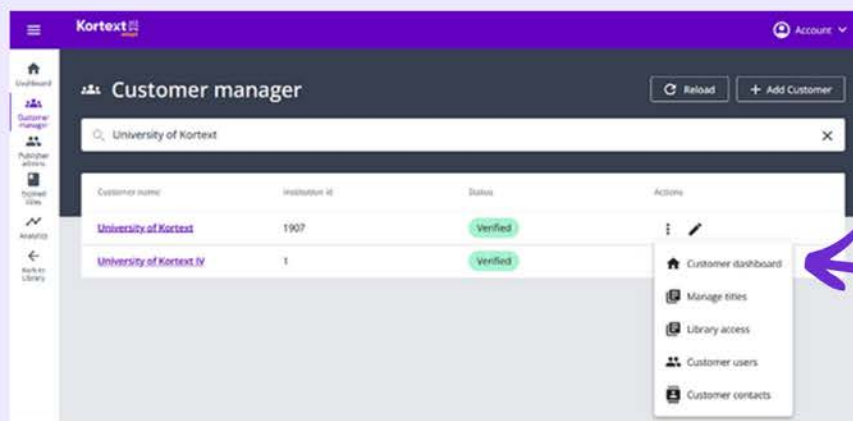
Customer dashboard

You can manage your **Customer users**, **Titles**, **Licences**, and **Contacts** on this page.

Dashboard

The **Dashboard** tab gives you a high-level overview of the customer information. Like the **Publisher dashboard**, the **Customer dashboard** consists of three components:

- **Customer users:** the number of end users you have added to this customer.
- **Books:** the number of books you have added to this customer.
- **Licences:** the number of licences you have added to this customer.

Clicking on any of the **Manage customer...** links on the cards will take you to a page with more detailed information.
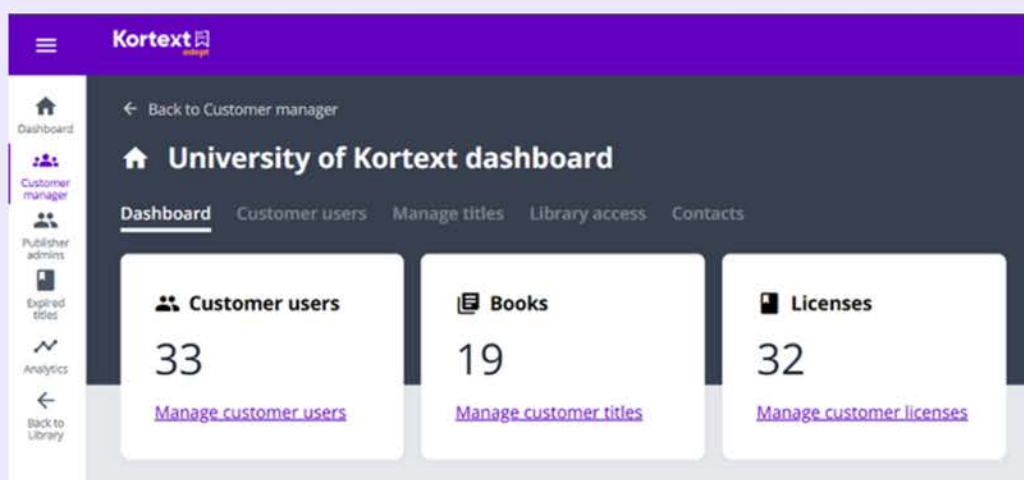
Customer users

In the **Customer users** tab, you will find a list of all the users you have added to this customer. You can narrow your results by searching for the user's email address in the **Search by email address** field. The **Advanced search** toggle also allows you to search by email address or filter by role type.

Adding customer users
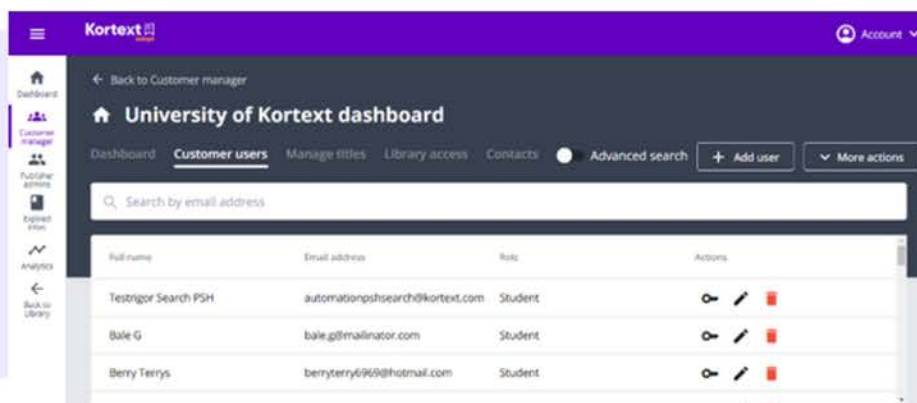New customer users can be added one at a time or in bulk.

To add a single new user:
1. Click the **+ Add user** button in the top-right corner of the **Customer users** page.

2. When the **Add user** form appears, insert their email address into the **Email** field.

3. Click the **Search user by email** button in the email field.

    a. If a match is found in the Kortext database, the **Full name** field will auto-populate.

    b. If no match is found in the Kortext database, you will be prompted to add a **full name** and **password**.

Please note that you do not need to share the password you set with the end user. They will receive a welcome email when you click **Save**, prompting them to create their own password.

4. Select the desired role type from the **Role** drop-down menu.

a. **Students** can access the digital content you share with them. You can provision access codes to students.

b. **Academics** are added as customer administrators, meaning they can log in to **adopt**, manage titles, reset passwords and view licences. You can provision desk copies and review copies to academics.

5. Click **Save** to add the customer user.

To bulk import customer users:

1. Click the **More actions** button in the top-right corner of the **Customer users** page.

2. Select **Download import users template**.

3. Open the spreadsheet that was just downloaded on your local machine.

4. Delete the three lines of example data.

5. Populate the **Email, FullName, Password** and **Role** columns for each customer user you would like to add.
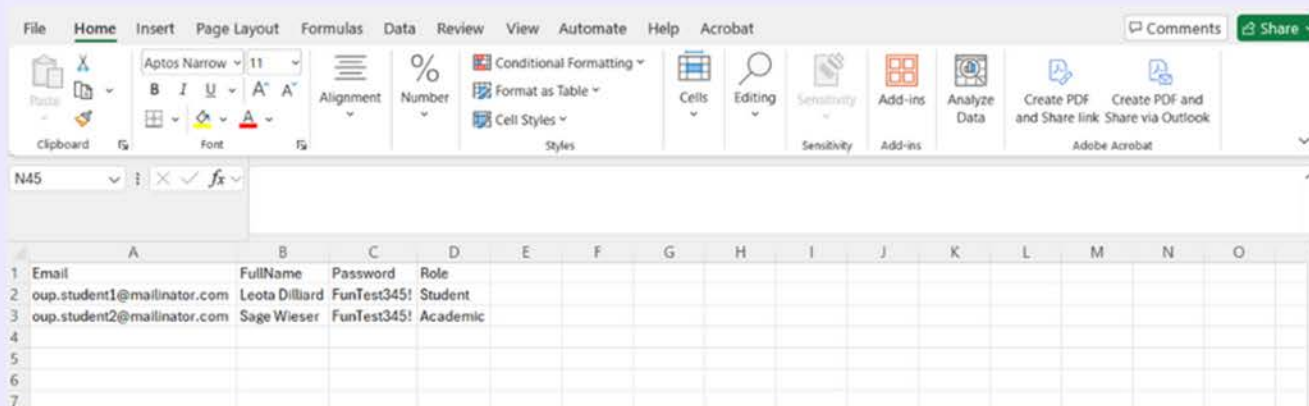
6. Save your spreadsheet once you have added all the data.

To assign user type in the **Role** column:

Type **Student** to assign a student role.

To assign an academic/customer administrator role, type **Academic**.

See image below:

7. Return to the **Customer users** page in the **adopt Customer manager**.

8. Click the **More actions** button in the top-right corner.

9. Select **Import users**.

10. Choose or drag and drop the spreadsheet you just saved with customer user data.

11. Click the **Import** button to complete the bulk addition of customer users.
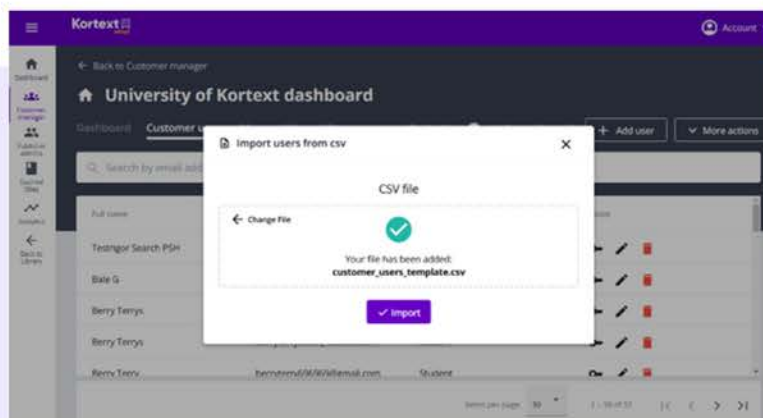
Editing customer users

It is possible to edit a customer user's role type after they have been added. To edit a user's role:

1. Locate the account you wish to edit on the **Customer users** page.

2. Click the **Edit user** icon in the **Actions** column.

3. When the **Edit user** form appears, select your preferred role type from the **Role** drop-down menu.

4. Click **Save**.

Deleting customer users

It is possible to delete a customer after they have been added. To delete a customer user:
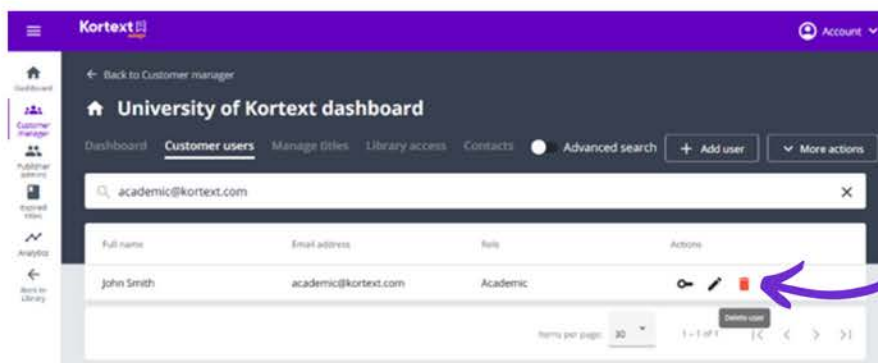
1. Locate the account you'd like to delete on the **Customer users** page.

2. Click the **Delete user** icon in the **Actions** column.

3. When the **Delete user** pop-up box appears, confirm your selection by clicking **Yes**.

Resetting passwords

Customer users are not authorised to initiate their password resets. If a user would like to reset their password, they should contact their publisher or customer administrator.
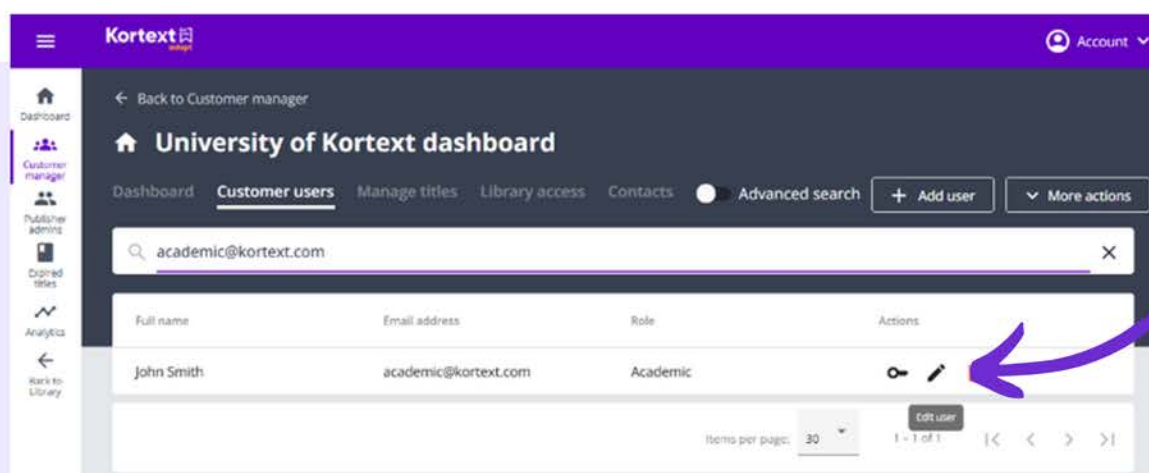
To support customer users who wish to reset their password:

1. Locate the account you'd like to reset the password for on the **Customer users** page.
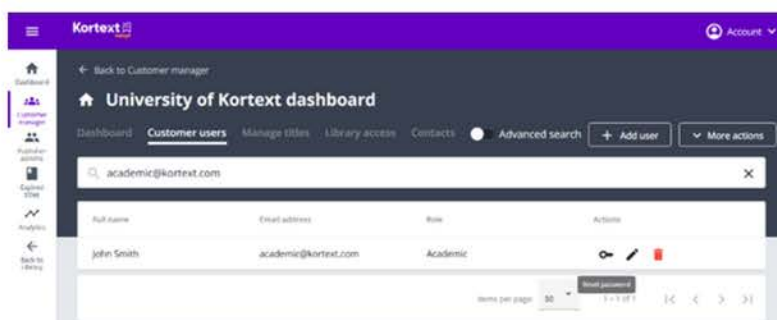
2. Click the **Reset password** icon in the **Actions** column.

3. When the **Reset user password** pop-up box appears, confirm your selection by clicking **Yes**.

4. The user will automatically be sent an email from no-reply@kortext.com that includes a link to reset their password.

Manage titles

In the **Manage titles** tab, you will find a list of all the books you have prepared for ordering by this customer.

Key information about the titles is displayed in a table on this page, including book details and licence set-ups. The books can be sorted by title, author or publisher.
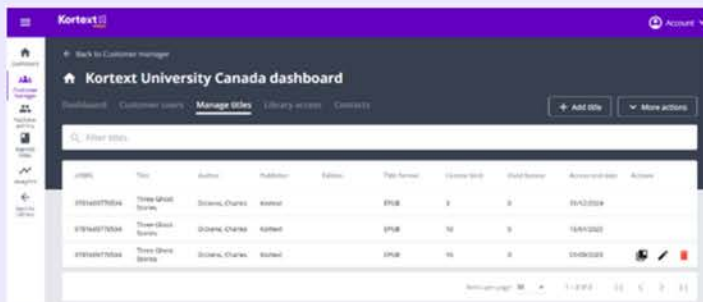
Adding a title individually
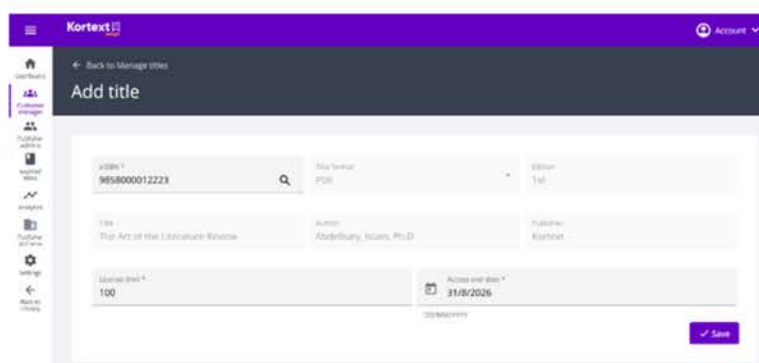
Before you can send a **desk copy**, **review copy** or **access code** to a customer user, you must make the licence available on the **Manage titles** screen. To add a new title:

1. Click the **+ Add title** button in the top-right corner of the **Manage titles** page.

2. When the **Add title** form appears, paste the eISBN into the **eISBN** field.

3. Click the **Search title by eISBN** button for the rest of the title details to auto-populate.

Please note that if a PDF and EPUB are available but share an eISBN, the form will select EPUB by default.

If you would like to add the PDF version, open the **Title format** drop-down menu and select the alternative file type.

4. Once the book details are populated, enter the **Licence limit**. This should be the maximum number of licences you wish to provision.

5. Set an **Access end date**. This should be the date you wish the book to expire on the user's bookshelf.

6. Click the **Save** button to add the title.

You will only be able to add licences when content is loaded and available in Kortext.
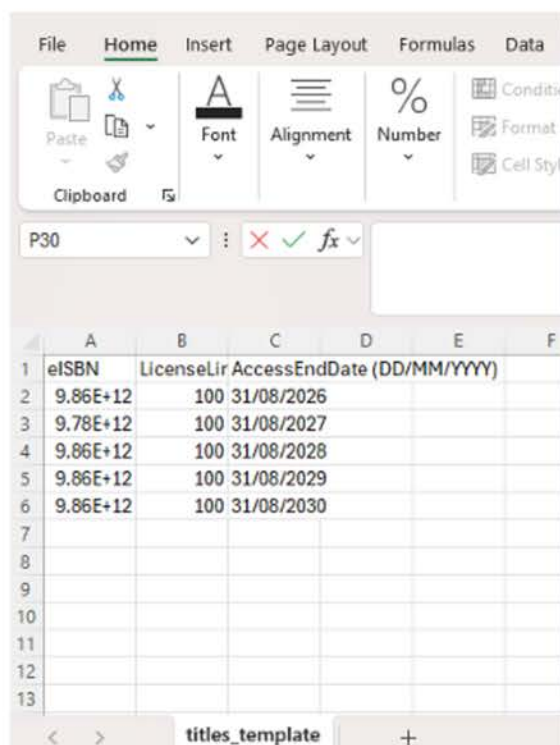
Kortext adopt
Publisher administrator guide

Adding titles in bulk

If you have several titles/licences to add to **adopt**, you can do this with our bulk import option. To bulk import titles:

1. Click the **More actions** button in the top-right corner of the **Manage titles** page.

2. Select **Download import template**.

3. Open the spreadsheet that was just downloaded to your local device.

4. Delete the six rows of example data.

5. Populate the **EISBN**, **LicenceLimits** and **AccessEndDate** fields for the titles you wish to add.

6. Save your spreadsheet once you have added all the data.

7. Return to the **Manage titles** tab in **adopt**.

8. Click the **More actions** button.

9. Select **Import titles**.

10. Choose or drag and drop the spreadsheet you just saved with title and licence data.

11. Click the **Import** button to complete the bulk addition of titles.

Editing titles

The licence information for titles can be edited. The title information cannot be edited as it is obtained from the metadata in the Kortext content inventory. To edit the licence information for a title:
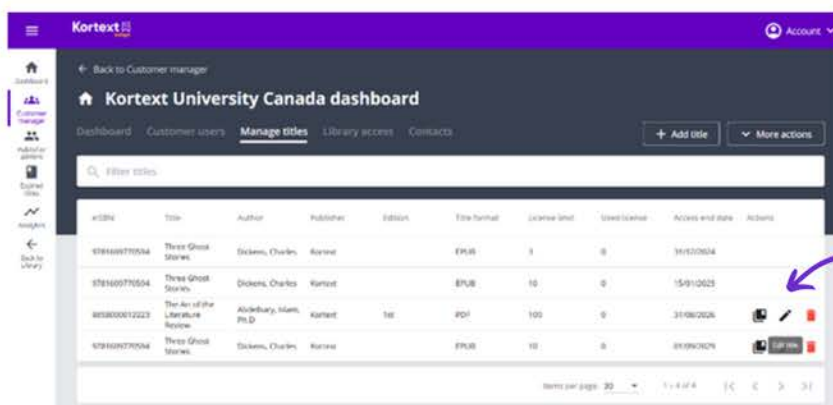
1. Locate the title you wish to edit on the manage titles page.

2. Click the **Edit title** button in the **Actions** column.

3. When the **Edit title** form appears, make your desired adjustments in the **licence limit** and/or **access end date** fields.

4. Click the **Save** button to update the licence.
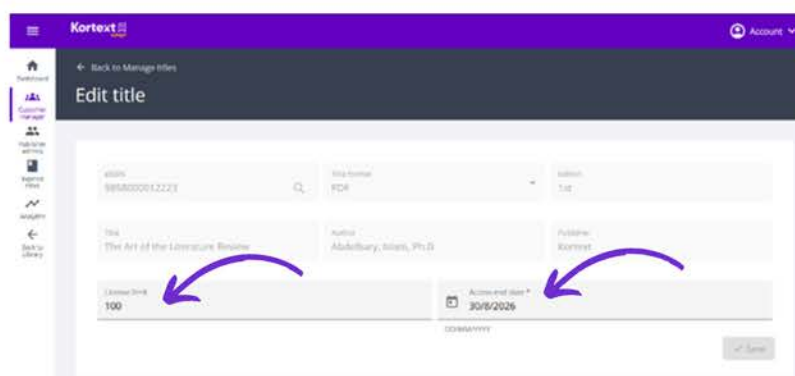
Please note that licences that have surpassed their **access end date** cannot be edited.

Deleting titles

Licences can be deleted from **adopt** if they have not yet been distributed, or if they have been distributed but no users have downloaded the content for use in one of the Kortext native or mobile apps.

If a licence is deleted, this will remove the line from the **Manage titles** screen and you will be unable to send any new access codes, desk copies or review copies.

To delete a licence:

Kortext adopt
Publisher administrator guide
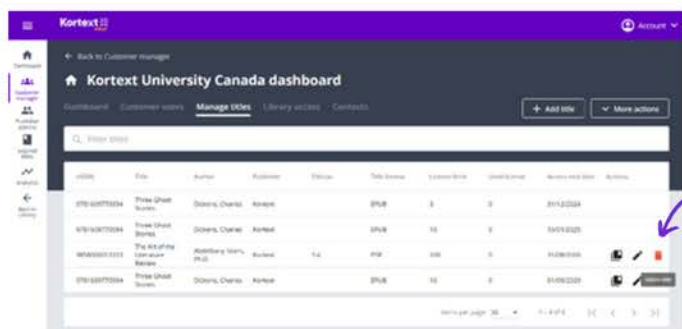
1. Locate the title you wish to delete on the **Manage titles** page.

2. Click the **Delete title** button in the **Actions** column.

3. When the **Delete title** pop-up appears, confirm your decision by clicking **Yes**. This action cannot be undone, so please double-check before confirming.

Please note that if even one user has downloaded their book for offline reading, the licence cannot be deleted.

Exporting title data

You can export the data on the **Manage titles** page into an spreadsheet. To export the data:
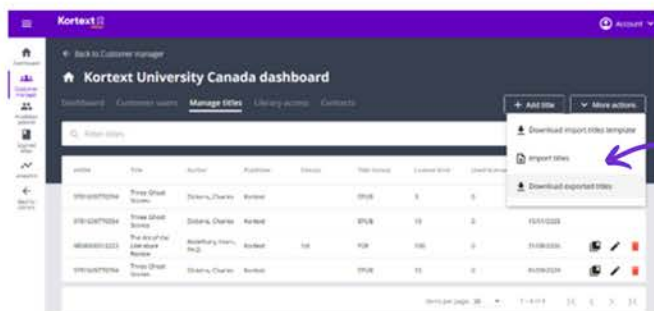
1. Click the **More actions** button in the top-right corner of the **Manage titles** page.

2. Select **Download exported titles**.

A CSV file will be downloaded onto your local device.

Title licences

Licences can be provisioned to customer users from the **Manage titles** screen. You can view your sent licences as follows:
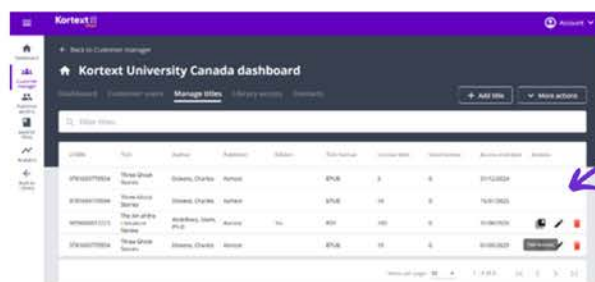
1. Locate the title for which you wish to view the provisioned licences on the **Manage titles** page.

2. Click the **Title licences** button in the **Actions** column.

On the **Access codes** page, you can search by email address or access code. The list can be sorted by email or permit download. The page indicates when a user has redeemed their code.

Provisioning single access codes

To use one of your set title licences on an access code for a student, follow these steps:

1. Locate the title line you would like to provision an access code for on the **Manage titles** screen.

2. Click the **Title licences** button in the **Actions** column.

3. When the **Access code** page appears, click the **Add licence** button in the top-right corner of the screen.

4. Select **Invite users**.

5. Paste the email address of the user you wish to provision the code to in the **Filter users** field.
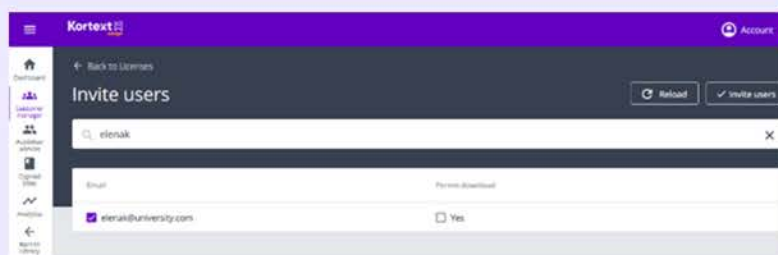
Please note the only accounts that appear on this list are the accounts you have added as a customer user with the role of 'student'.

6. Tick the box next to the email address to indicate you wish to generate an access code for this user.

7. Tick the **Permit download** box if you would like to allow the user to read their book offline. If you do not wish them to read their book offline, leave the box unticked.

8. Repeat the process for any additional users you would like to provision access codes to.

9. Once you are happy with your list of users and download permissions, click the **Invite users** button in the top-right corner of the screen to automatically send an email to the selected users with access instructions.
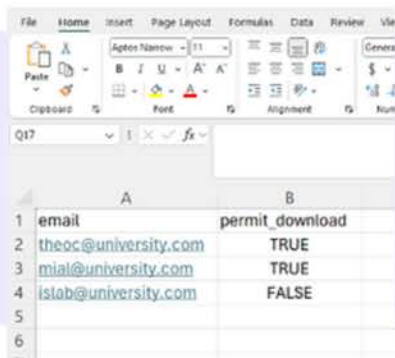
Provisioning access codes in bulk

To provision title licences in bulk via access code, follow the instructions below:

1. Locate the title line you would like to provision an access code for on the **Manage titles** screen.

2. Click the **Title licences** button in the **Actions** column.

3. When the access code page appears, click the **More actions** button in the top-right corner of the screen.

4. Select **Download licence template**.

5. Open the spreadsheet that was just downloaded to your local machine.

6. Delete the six rows of example data.

7. Populate the **email** and **permit_download** fields for the users you would like to generate access codes for.

8. Save your spreadsheet once you have added all the data.

The **permit_download** column accepts two responses: **TRUE** or **FALSE**. Please add **TRUE** to this field if you would like to permit downloads for the user. Please add **FALSE** to this field if you would not like to permit downloads for the user.

9. Return to the **Access codes** page in **adopt**.

10. Click the **More actions** button in the top-right corner.

11. Select **Import licence template**.

12. Choose or drag and drop the spreadsheet you just saved with the user and download data.

13. Click the **Import** button to automatically send an email to all the users with access instructions.

Deleting access codes

Should you wish to remove an access code you have previously generated:

> 1. Locate the title line you wish to remove the access code for on the **Manage titles** screen.
>
> 2. Click the **Title licences** button in the **Actions** column.
>
> 3. Locate the licence you would like to remove on the **Access codes** page (remember you can search by email address or access code).
>
> 4. Click the trash icon in the **Actions** column on the relevant line.
>
> 5. Confirm your selection by clicking **Yes** on the **Delete book licence** pop-up. This action cannot be undone.
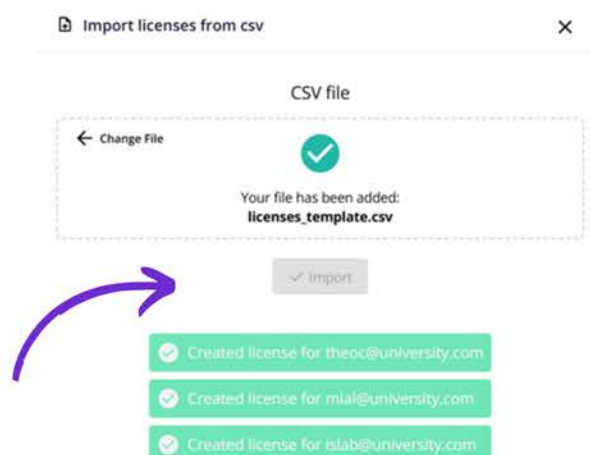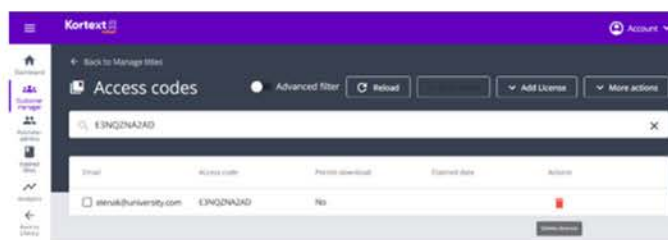

If you would like to remove access codes in bulk:

> 1. Locate the title line you wish to remove the access code for on the **Manage titles** screen.
>
> 2. Click the **Title licences** button in the **Actions** column.
>
> 3. Locate the first licence you would like to remove on the **Access codes** page (remember you can search by email address or access code).
>
> 4. Click the **tick box** in the far-left column to select that user.
>
> 5. Repeat steps 3 and 4 until you have selected all the licences you wish to remove.
>
> 6. Click the **Bulk delete** button in the top-right corner of the page.
>
> 7. Confirm your selections by clicking **Yes** on the **Delete book licence** pop-up. This action cannot be undone.
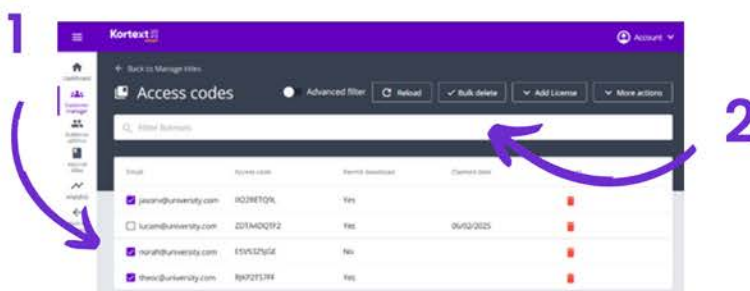
Please note that a licence cannot be deleted if the user has redeemed their licence and accessed the content on one of the Kortext native apps.

Exporting title licence data

If you need to export access code data into a spreadsheet, follow the instructions below:

1. Locate the title line you wish to export access code data for.

2. Click the **Title licences** button in the **Actions** column.
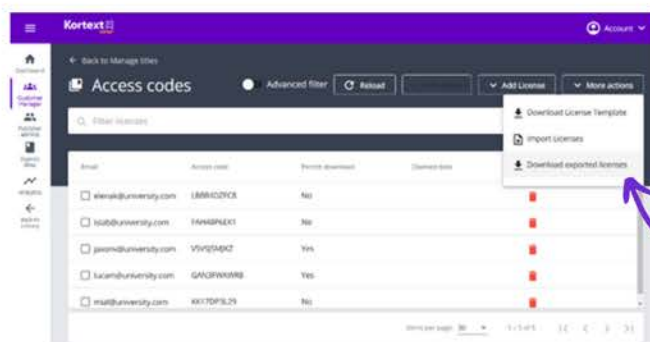
3. When the **Access codes** page appears, click the **More actions** button in the top-right corner.

4. Select **Download exported licences** to begin a CSV download of the data shown on this page.

Provisioning desk copies and review copies

Desk copies and review copies can be sent to any account you have added to the **Customer users** tab with the role type of 'academic'. They must be aligned with the correct customer.

Desk copies are usually provisioned for academics who have adopted the book on to their course. Access will be provided until the end date stipulated in your selected licence.

Review copies (also referred to as inspection copies) are provisioned with 14 days of access for an academic who is deciding if they would like to adopt the book on to their course.

To provision a desk or review copy to an academic:

1. Locate the title line you would like to provision a desk or review copy for on the **Manage titles** screen.

2. Click the **Title licences** button in the **Actions** column.

3. When the **Access codes** page appears, click the **Add licence** button in the top-right corner.

4. Select **Desk copies** if you would like to send a desk copy, or **Review copies** if you would like to send a review copy.
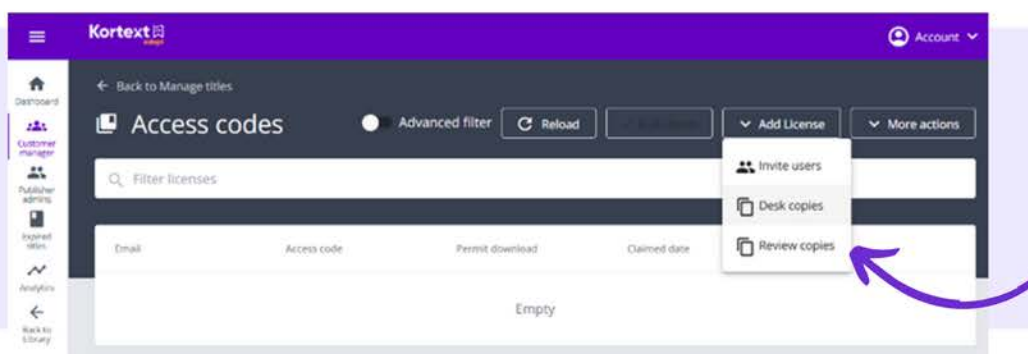
5. Once you make your selection, you will be taken to the **Desk copy** or **Review copy** page. This page will contain a list of all eligible users.

6. Locate the user you wish to provision a desk or review copy to on the list (you can search by email address in the **Filter users** field).

7. Click the tick box in the far-left column to make your selection.

8. Click the **Desk copies** or **Review copies** button in the top-right corner of the screen to automatically send an email to the user with access instructions.
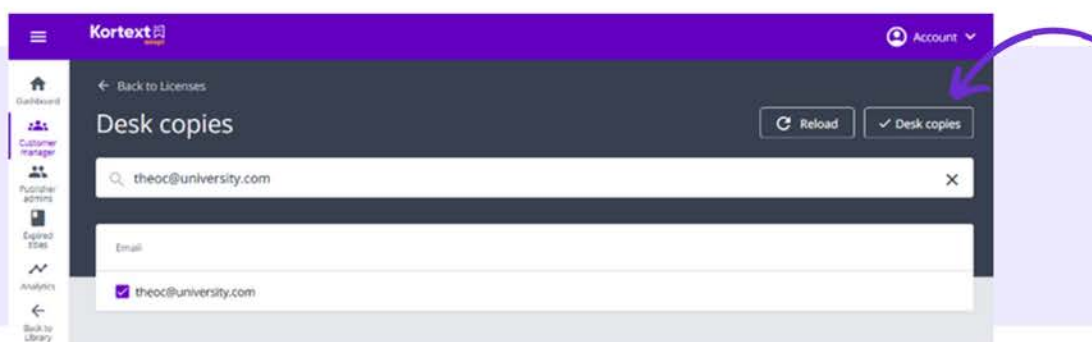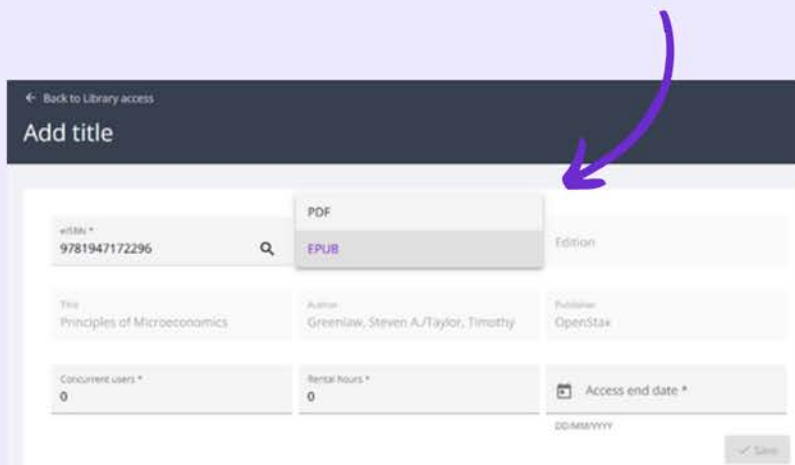
Library access

Another way you can provision content to your customers is via a library order. Library orders become available to your customer users in the Kortext reader, under the tab called **Kortext library**. You can customise access to each title by setting concurrency limits, specifying rental hours, and setting start and end dates.

Adding single titles to a library order

1. Click the **Library access** button in the top ribbon of your **Customer dashboard** (if you don't have this button, please contact Kortext support).

2. Click the **+ Add title** button in the top-right corner of the screen.

3. Add the eISBN of the book you wish to add in the **eISBN** field.

4. Click the **Search title by eISBN** button (please note that the content must be loaded and available in Kortext for a match to be found).

5. Once a match is found, the rest of the metadata fields will be auto-populated with the information found in the Kortext content database.

If you have both an EPUB and PDF loaded and available on Kortext with the same eISBN, the **Search title by eISBN** tool will default match to EPUB. Should you wish to change to PDF, use the **Title format** drop-down to select the alternative file type.
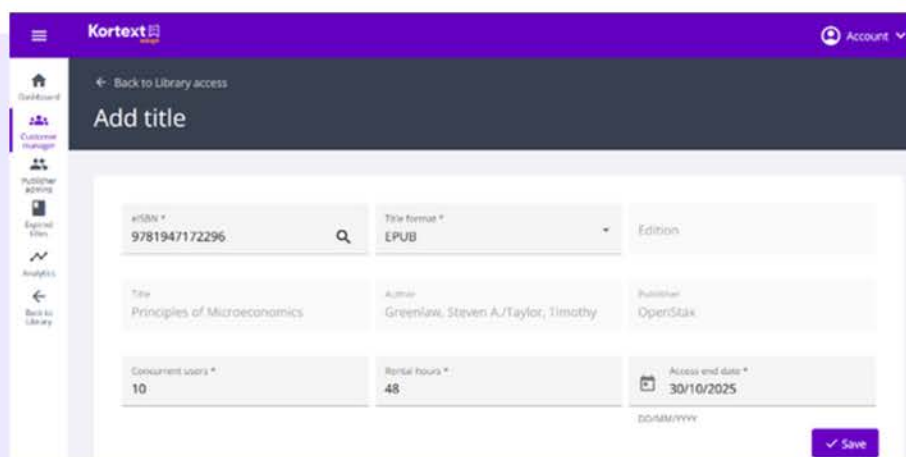
6. Populate the **Concurrent users** field as desired. This will be the maximum number of users allowed a licence at the same time.

7. Populate the **Rental hours** field as desired. This will be the maximum number of hours a user can have the book on their account before having to borrow it again.

8. Populate the **Access end date** field as desired. This will be the date the book will be removed, and the content will no longer be accessible.
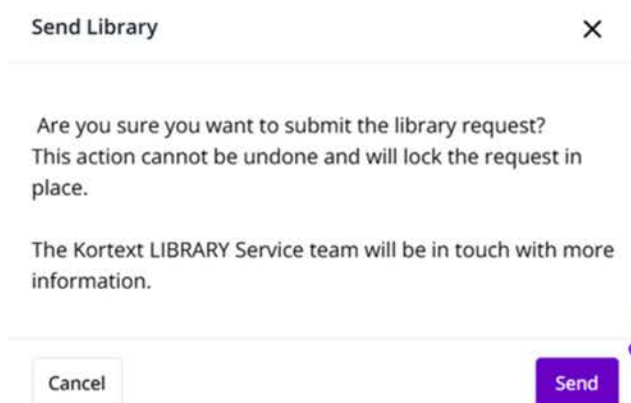
9. Once you are happy with your selections, click the **Save** button.

10. Repeat steps 2—9 until all the books you would like to order are added to the **Library access** tab.

11. When you are ready to submit your order, click the **Send library** button in the top-right corner of the screen.

12. Click **Send** when the **Send library** pop-up appears to submit your library order to Kortext.

At this point, your library will become locked, and you will be unable to make any further edits. After Kortext completes provisioning for your library order, the **Library access** tab of the **Customer dashboard** will be unlocked again.

Bulk adding titles to a library order

1. Click the **Library access** button in the top ribbon of your **Customer dashboard** (if you don't have this button, please contact Kortext support).

2. Click the **More actions** button in the top-right corner of the screen.

3. Select **Download library template**.

4. Open the spreadsheet that was just downloaded on your local machine.

5. Delete the two lines of example data.

6. Populate the **eISBN**, **ConcurrentUsers**, **RentalHours** and **AccessEndDate** fields for each title you would like to add.

7. Save your spreadsheet once you have populated all the data.

	A	B	C	D	E	F
1	eISBN	concurrer	rentalHou	accessEndDate (DD/MM/YYYY)		
2	978194424138	10	48	30/10/2025		
3	9781944424497	10	48	30/10/2025		
4	9858000003719	10	48	30/10/2025		
5						
6						
7						

8. Return to the **Library access** tab in **adopt**.

9. Click the **More actions** button in the top-right corner of the screen.

10. Select **Import library titles**.

11. Choose or drag and drop the spreadsheet you just saved with title and rental data.

12. Select the **Import** button to bulk import all the titles on your list.

Import titles from csv ✕

CSV file

← Change File

✓

Your file has been added:
customer_library_titles_template.csv

✓ Import

At this point, your library will become locked, and you will be unable to make any further edits. After Kortext completes provisioning for your library order, the **Library access** tab of the **Customer dashboard** will be unlocked again.
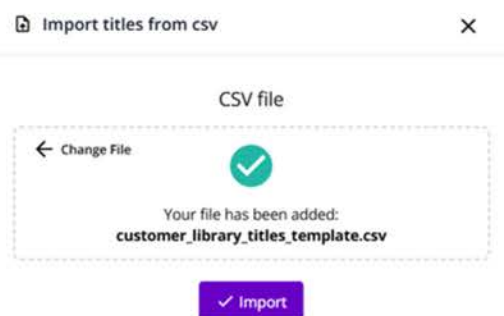
Contacts

In the **Contacts** tab, you will find a list of all the contacts you have added to this customer. You can narrow your results by searching for the user's email address in the **Search by email address** field. The **Advanced search** toggle also allows you to search by email address, name or job title.

Customer contacts are not granted special permissions or access to your **adopt** instance. This tab is only used to register key contacts and contact information.
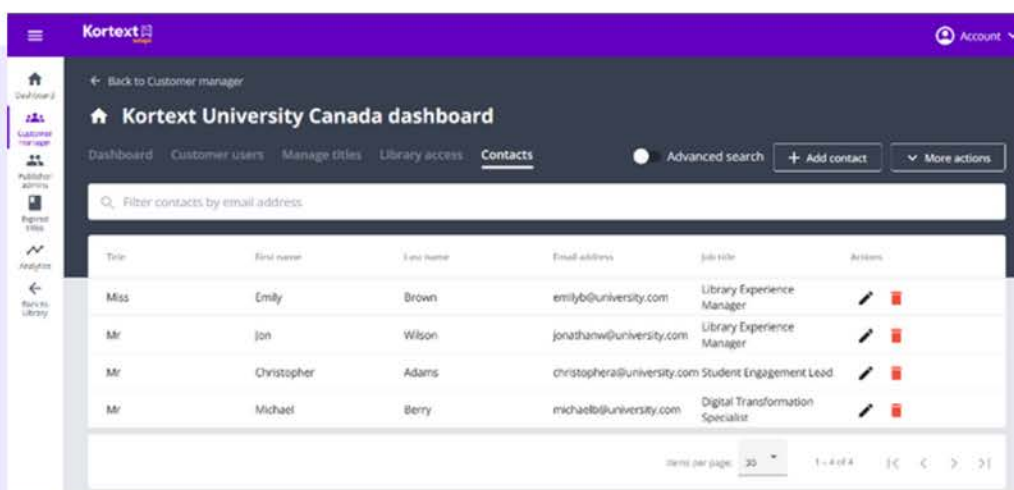
Adding contacts

New customer contacts can be added one at a time or in bulk.

To add a single new contact:

1. Click the **+ Add contact** button in the top-right corner of the **Contacts** page.

2. When the **Add contact** form appears, fill in the form with as much information as you like (please note that the **Email address**, **Country** and **State** fields are mandatory).

To bulk import contacts:

1. Click the **More actions** button in the top-right corner of the **Contacts** page.

2. Select **Download import template**.

3. Open the spreadsheet that was just downloaded on your local machine.

4. Delete the two lines of example data.

5. Populate the template with as much information as you like (please note that the **Email address**, **Country** and **State** fields are mandatory).

6. Save your spreadsheet once you have added all the data.

	A	B	C	D	E	F	G	H	I	J	K
1	Title	FirstName	LastName	Email	JobTitle	PhoneNur	Address	Address2	Country	State	ZipCode
2				emilyb@university.com					United Kir	Dorset	
3				priyak@university.com					United Kir	Dorset	
4				jamese@university.com					United Kir	Dorset	
5				olivern@university.com					United Kir	Dorset	
6											

7. Return to the **Contacts** page in the **adopt Customer manager**.

8. Click the **More actions** button in the top-right corner.

9. Select **Import contacts**.

10. Choose or drag and drop the spreadsheet you just saved with contact data.

11. Click the **Import** button to complete the bulk addition of contacts.

Import contacts from csv ✕

CSV file

← Change File ✓

Your file has been added:
customer_contacts_template.csv

✓ Import

✓ emilyb@university.com
✓ priyak@university.com
✓ jamese@university.com
✓ olivern@university.com

Kortext adopt
Publisher administrator guide

Editing contacts

It is possible to edit a contact after they have been added. To edit:

1. Locate the account you wish to edit on the **Contacts** page.

2. Click the **Edit contact** icon in the **Actions** column.

3. When the **Edit contact** form appears, make your edits.

4. Click **Save**.
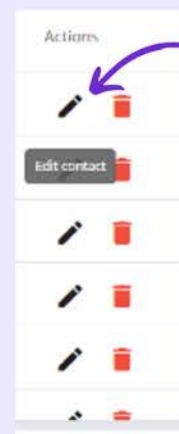
Deleting contacts

Should you wish to delete a contact, follow the instructions below:

1. Locate the contact you'd like to delete on the **Contacts** page.

2. Click the **Delete contact** icon in the **Actions** column.

3. When the **Delete contact** pop-up box appears, confirm your selection by clicking **Yes**.
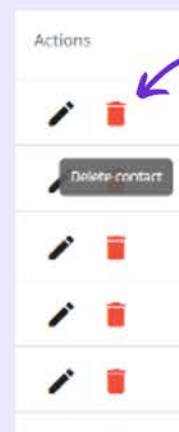
Publisher admins

Clicking the **Publisher admins** button in the left navigation menu will bring you to the **Publisher administrators** page where you can filter or add new publisher administrators.

Publisher administrators can add new customers, and manage titles, licences and contacts.

Here you can find a list of everyone currently listed as a **Publisher administrator** in your adopt instance.

Kortext adopt
Publisher administrator guide

Adding a publisher administrator

To add a new publisher administrator to your **adopt** instance:

1. Click the **Publisher admins** button from the left navigation menu.

2. In the top-right corner, click the **+ Add Publisher administrator** button.

3. When the **Add publisher administrator** form appears, paste the email address into the **Email** field, then click **Save**.

> Please note that the user you are adding as a publisher administrator **must already exist in Kortext**.

After you add a publisher administrator to this page, they will receive an automated email from no-reply@kortext.com to notify them that they have been added as a publisher administrator and give them instructions for logging in.

Removing a publisher administrator

Publisher administrators can be removed whenever you like. To remove a publisher administrator from your **adopt** instance:

1. Click the **Publisher admins** button from the left navigation menu.

2. Paste the email address or name of the individual you wish to remove in the **Filter publisher administrators** bar.

3. In the **Actions** column, click the **trash bin** icon.

4. When the **Delete publisher administrator** pop-up window appears, confirm your selection by clicking **Yes**.
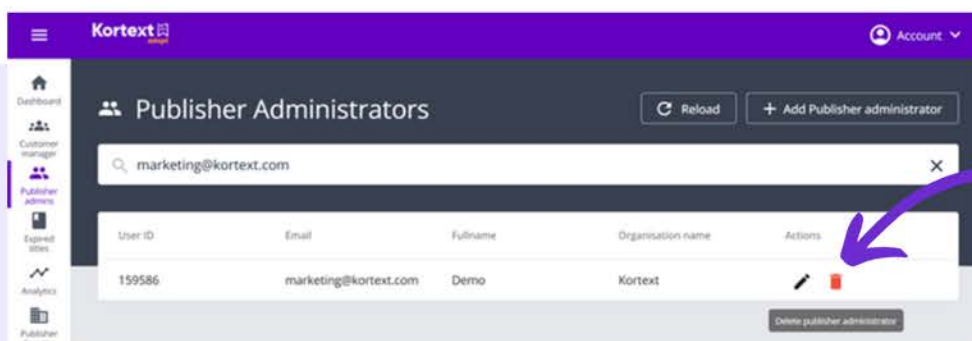
Expired titles

Any titles or licences you have set up in **adopt** that have since expired or are soon to expire become available as a collated list in the **Expired titles report**.

To access this report:

1. Click the **Expired titles** button in the left-hand navigation menu.

2. When the **Expired titles** page appears, you will be presented with a list of titles. The list contains the following information:
a. Customer name
b. Book title
c. eISBN
d. Format
e. Expiring date
f. Licence information in the **Actions** column.

The **Filter by days** toggle in the top-right corner of the screen allows you to view slightly different results. By default, this number is set to three so the report will display titles that are expired or will expire in three days or less.

Modifying the **Days** filter allows you to increase or decrease this number. For example, to view the titles expiring in the next two weeks, change the number in the **Days** field to 14.
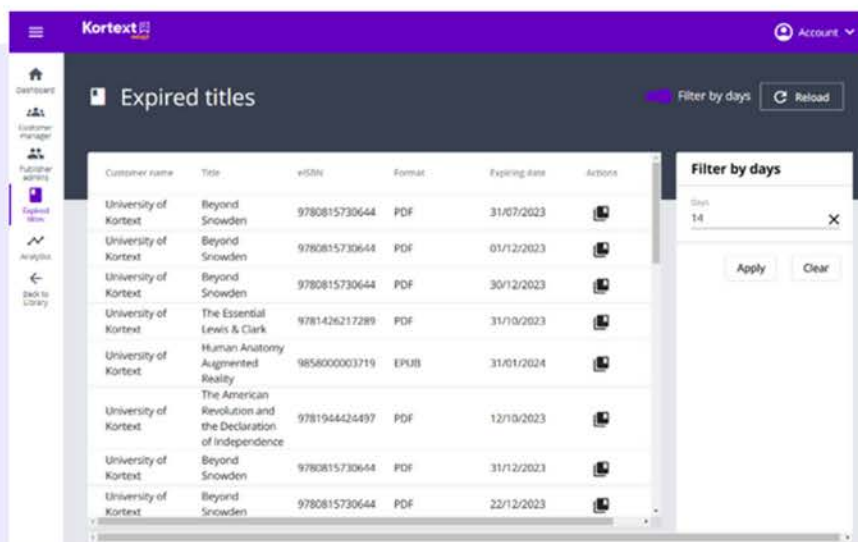
Analytics

If you have analytics enabled, you will have an **Analytics** button in the left-hand navigation menu. Your **analytics dashboard** provides you with helpful information about access and usage. The dashboard becomes available once you have onboarded your first customer.

Setting up Microsoft Authenticator

1. Download the **Microsoft Authenticator** mobile app to your mobile device (skip this step if you already have the **Microsoft Authenticator** app installed).
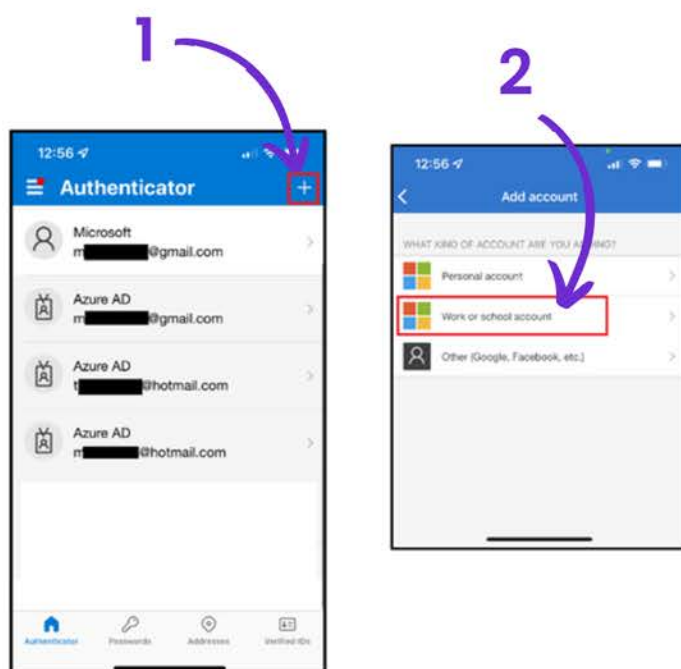

2. Once downloaded, open the app on your mobile device.

3. Click the **+** button in the top-right corner.

4. Select **Work or school account**.

5. When the **Add work or school account** pop-up appears, select **Sign in**.

6. Enter the credentials provided to you by Kortext.

Kortext adopt
Publisher administrator guide

Accessing your analytics dashboard

Once you have successfully installed your **Microsoft Authenticator** app, you will be able to access your **Analytics dashboard**. To access your **adopt** analytics:

1. Click the **Analytics** button in the left-hand navigation menu.

2. When the **Power BI** sign-in page appears, click the **Sign in** button.

3. Enter your login credentials on the Microsoft sign-in page.

4. Microsoft will prompt you to approve your sign-in request. When the approval page appears with a code on the screen, open the **Microsoft Authenticator** app on your mobile device.

5. On the app, enter the code displayed on your computer screen.

6. On the app, click **Yes**.

7. Once you have successfully verified in the Microsoft Authenticator app, your **adopt** **Analytics dashboard** will open on your computer screen.

If you require additional support for your Microsoft Authenticator app, consider visiting these articles:

- For download and how-to information, click here.

- For information about adding your accounts to the Microsoft Authenticator, click here.

- For information on signing in to your Microsoft Authenticator, click here.

Kortext Est 2013

For help, please visit:

support.kortext.com