

# VitalSource®

## Manage User Guide

*For Enterprise Accounts*

## VitalSource Manage User Guide

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## Introduction

VitalSource Manage is the back-end system that our internal and external support teams use to manage users of the VitalSource Bookshelf platform.

Support teams will be given access to two Manage Groups:

- Bookshelf Users
- Bookshelf Codes

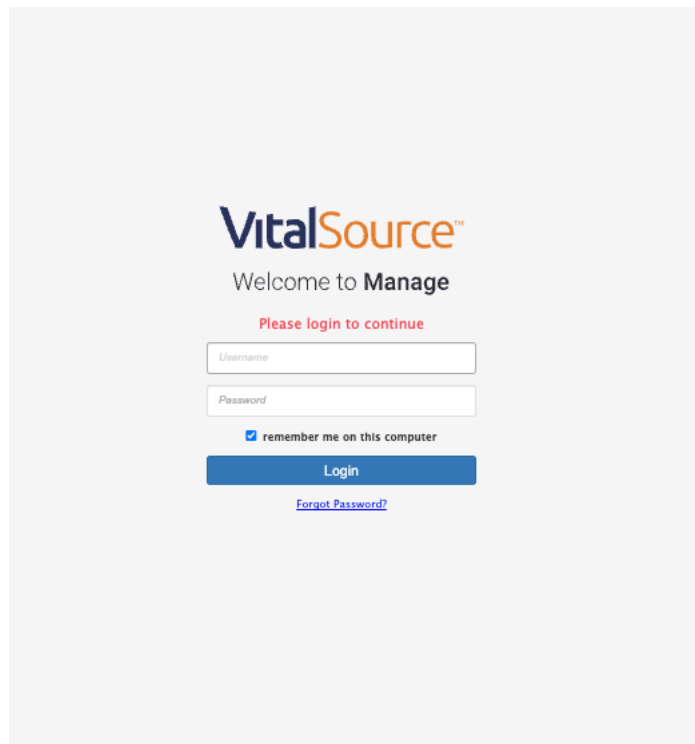
With these two groups a team member can handle all basic level support requests as defined by VitalSource Technologies below.

### Tier 1 Definitions

Access User Account Information  
Manage Devices  
Set Passwords  
Look up Codes  
Installation assistance for downloadable applications  
General Usage (e.g. print, highlighting, annotation, note sharing)  
Code Redemption  
All other support issues listed on <https://support.vitalsource.com>

This document will cover how to handle all the basic level support.

## Accessing VitalSource Manage



### Manage Login

VitalSource Manage is located at <https://manage.vitalsource.com>

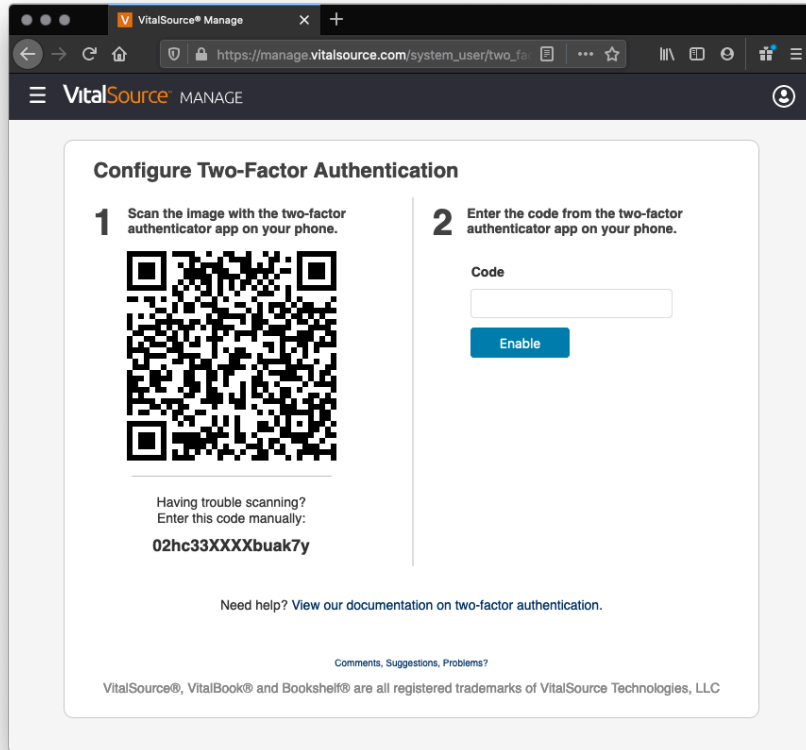
### Supported Web Browsers

Manage is supported on the same browsers as Bookshelf Online.

- Chrome (stable channel)
- Firefox (release channel)
- Microsoft Edge (stable channel)
- Safari (stable channel)
- Opera (stable channel)

You can find more information and current updates by reviewing the [Bookshelf Online Browser Support Policy](#)

## Two Factor Authentication



Note: Before you can sign in to Manage, each school contact will need to have their own unique Manage account. If you do not have an account please email [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com) to request one.

Once logged in to Manage you will need to set up Two Factor Authentication. You can find step by step [setup instructions](#) on our Support Page.

## Changing Your Manage User Settings

### Password Reset

- Go to [https://manage.vitalsource.com/forgot\\_password](https://manage.vitalsource.com/forgot_password).
- Enter your username and click send (this may or may not be your email address)
- You will receive a password reset link. This is valid for 1 hour.

### Name, Email, or Login Update

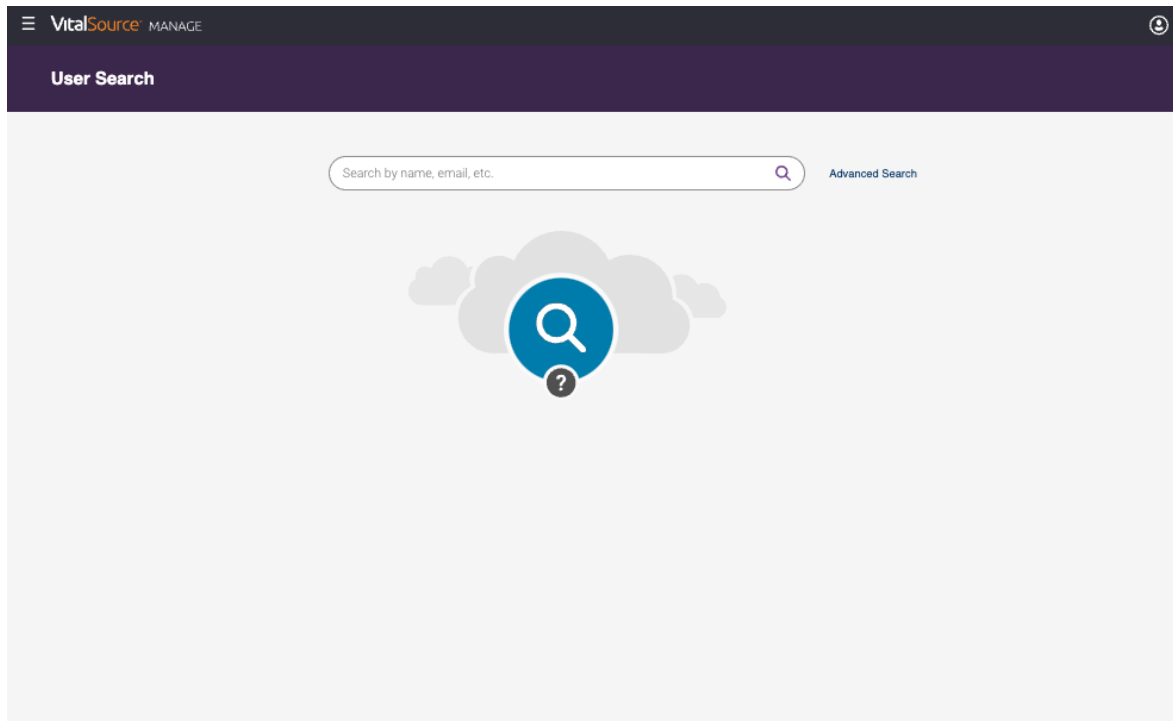
- If a Manage user at your school needs to update their name, email, or login please email [manage.help@vitalsource.com](mailto:manage.help@vitalsource.com) with these changes.

### Two Factor Authentication Reset

- If the device used to set up your Two Factor Authentication was lost or is no longer showing a code, you will need to have the authentication process reset.
- Email [manage.help@vitalsource.com](mailto:manage.help@vitalsource.com) from the email address on your account with a request to reset your 2FA. Please provide additional information as requested by the VitalSource team.

## Searching for Bookshelf Users

### Looking up a Bookshelf User



The first part of troubleshooting most issues is to look up the user. To search for a user or to see if the user has not created an account yet with VitalSource, click on the Menu icon in the upper left corner, then select Users, and Search Bookshelf Users

You can search by:

- Partial or full email
- Partial or full first name and last name
- Company Reference # (Student ID, Customer #, etc) if your school sends this.

Once you have successfully located the user, you can click on the name of the student and you will be taken to their Manage Bookshelf account.

## User Results

Full user information is available only for students to whom your school has licensed content. If a result with partially obscured information displays for your search query and you believe this is your customer, please email [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com) with a link to the user's page and our team will assist.

## What happens if I do not locate a User in Manage?

If you were unable to locate a user in Manage by email address or first and last name, it is likely they have not yet created or completed an account with VitalSource. For schools who use an LMS the student will need to click the book access link within their course to create and configure their account with VitalSource. If you encounter a student who states they already have a VitalSource account and are able to pull up an account and view books but you are unable to find them in Manage please email [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com) for assistance.



## Bookshelf User Page

1. User Profile Information
2. Device Information
3. Content
4. Notes
5. Actions Menu

### Editing Bookshelf User Steve Rodgers (c...@gmail.com)

User Search | GUID Export | New Bookshelf User

Actions for Steve Rodgers:

[Edit User](#) | [Password](#) | [Redeem a Code](#) | [User Online Login](#) | [User Store Login](#) | [Force License Update](#)

**1**

First name:

Last name:

Email:

Email Locked

Email Verification Required

Email Verification Completed

[Send Email Verification Email](#)

Two-Factor Auth Setup: Not Applicable

Created On: April 11, 2013

Reference: None

GUID: 3: ...

Access token: ...

Locale: English

Uber License

Max desktop activations

Max mobile activations

Question: In what city were you born?

Question response:

Sales tier:

Organization:

Capture User Analytics

Promote Option: Opt out

Survey Option: Opt out

Sampling EULA Accepted: No

Last Bookshelf Brand Accessed: pageburstis

**2**

Last Online Update: 2022-12-05 19:23:50 UTC

Computers: 2 out of 2 activated

Mobile Devices: 3 out of 2 activated

Products: (export product list [deprecated]) (Export all code history) Sort: Title | Date Added

**4**

Notes

[Update Notes](#)

[Comments, Suggestions, Problems?](#)

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## The User Profile Contains

- The first and last name the user entered when the user created their account
- The email address used when the user created their account
- Reference/Company References (LMS access only) – ties the user’s LMS account to the bookshelf account
- Max activations
- Security Question and Response
- Promote and Survey option
- Update button – click on this if you make any changes to a User’s account

**Note:** LMS accounts may create placeholder accounts for a student and students will need to finish configuring their accounts to have their email and chosen security answer. If you find an account for a student that is a placeholder account, please ask the student to finish configuring their account so that their personal information is registered to the account.

## Devices

VitalSource Bookshelf allows a user to have 2 active computers and 2 active mobile devices (Smartphones and tablets) for offline viewing. The Machines Pane will give you information regarding current and past activations.

**Manage gives the following information for each device record:**

- Name of the computer/device
- Version of Bookshelf the user is running
- When a User registered that computer
- Last time a User updated their license.

## Deactivating Devices

1. Locate the user in Manage.
2. Confirm the student’s account by asking the security question.
3. Deselect the checkbox next to the device you wish to deauthorize.

## Content

The Content pane is where you see any books that have been linked to a user's account. Content can be added by redemption code, store purchases, or SSO/LMS integration.

Each title will give you the following information:

- The name of the title
- When the title will expire in Downloadable and Online
- How the content was accessed:
  - Redemption code: redemption codes will have information regarding who created them and/or institution name.
  - LMS/SSO: content a student receives from your institution will have the institution name in the record.
- Access date: LMS/SSO content will have an access date, which is the date the content was first accessed through the LMS.
- DROP/ADD (LMS only): If your institution has a drop/add period, students may have two activation dates – one for the drop/add period, and one for the longer license term.
- Publisher
- Book format
- File name: This is the VBK (you may also see this referred to as “VBID”). Similar to an ISBN, this is the book's identifying number and is also the file name for the book that gets downloaded to the student's account.
- CPR: Copy/Print restrictions. How many pages a student is allowed to copy or print out of the book at a time.

### **CPR: Copy/Print Restrictions**

If a book has a CPR setting of 2, then each time a student presses print, they will only be able to print out 2 pages at a time. If a student wishes to print out more than two pages in an eBook, they will need to press the print button again. Please know that print restrictions are set by the publisher.

### **Products**

Most students will have single titles. If the titles have been bundled, click on the product name and a new window will open showing a list of all titles included.

## Notes

This section is for the internal VitalSource Support team and does not require action by school contacts.

## Actions Menu

The Actions Menu will allow you to perform defined actions on the user account. The current options are Edit User, Password, Redeem Code, User Online Login, and Force License Update.

**Edit User** – the default page

**Password** – There are two ways to reset a user's password:

- Send the User a link to reset their password.
- Change the password for the user.

When a user is sent a link to reset their password, the email will be sent from Manage to the email address listed in their Manage account. Once sent, the link is valid for 24 hours or one click through. Once clicked the user will be taken to the Bookshelf Account Center. Once inside the Account Center the user can update their account settings.

If a user's password is reset inside Manage, the user will receive an email from Manage informing them that their password has been reset.

**Note:** If you change the password for a User, try to make the password a simple, generic password then instruct the student to update to a more secure password. It is not advisable to update the password for the student to their desired password, not only for privacy reasons, but also to prevent typos. You do not get an extra blank to confirm the password for a student and you will not see what the password is while you are typing it.

**Redeem Code** – Allows you to redeem a non-redeemed code for the user.

**User Online Login** – Logs you into Bookshelf Online as the user.

**Note:** Users are only able to have one active instance of VitalSource Online open at a time. If you are logged into the student's online account, then the student will not be able to view their account online. If they try to log in while you are logged in, then you will be kicked out of the User's account (and vice versa).

**Force License Update** – This updates a User's license. This is helpful if content is recently added.

## Bookshelf Codes

The section for Bookshelf Codes is where you can look up a code and see if it has been redeemed and who redeemed it.

**Note:** *Redemption code characters are not case sensitive.*

A successful Bookshelf code search will provide the following information:

- The Bookshelf code
- The name of the book/product
- The book/product VitalSource ID
- Who created the codes
- If the code was redeemed, the name on the account to which it was redeemed
- Licensing terms for the book/product
- Access codes, if they come with it

After successful redemption code search, click on the name of the user who redeemed the code to be taken to the user's account for further information/troubleshooting assistance.

**Note:** *It is only possible to look up codes that were created by your affiliated company/institution*

## Student Resources

VitalSource offers student and Tier 1 support team members access to the VitalSource Knowledge Base by going to <https://support.vitalsource.com>. Students and support staff can access current information for a multitude of issues that they may encounter.

## Escalating Cases

You and your team can escalate your concerns directly to [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com), that team of individuals will escalate it to your assigned Customer Success Manager.

When you email your concerns to [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com), a ticket will be created for you in the VitalSource ticketing system. You can use this ticket to track submitted cases.

**The [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com) email address is for school contacts, decision makers, and LMS administrators. Please do not provide this to students.**

**When submitting cases to VitalSource please include the following:**

- Student Name:
- Email address:
- Operating System:
- Platform (online, downloadable, mobile):
- Troubleshooting steps you've done (uninstall/reinstall Bookshelf, deauthorize machines):

**For Account Merges (students with 2 or more accounts) please also include:**

- Manage URL for the account to merge away.
- Manage URL for the account to keep.