



SAMS Sigma Administration Portal Guide

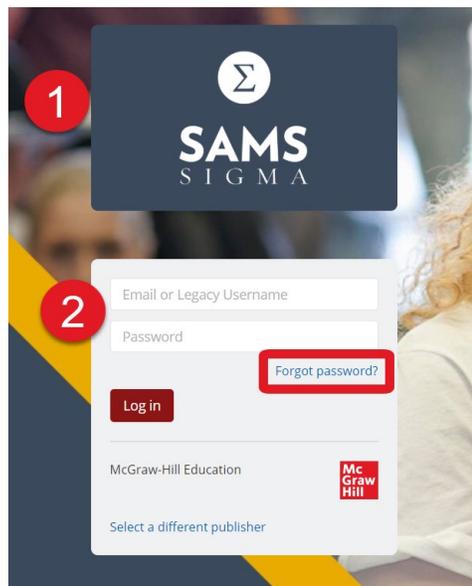
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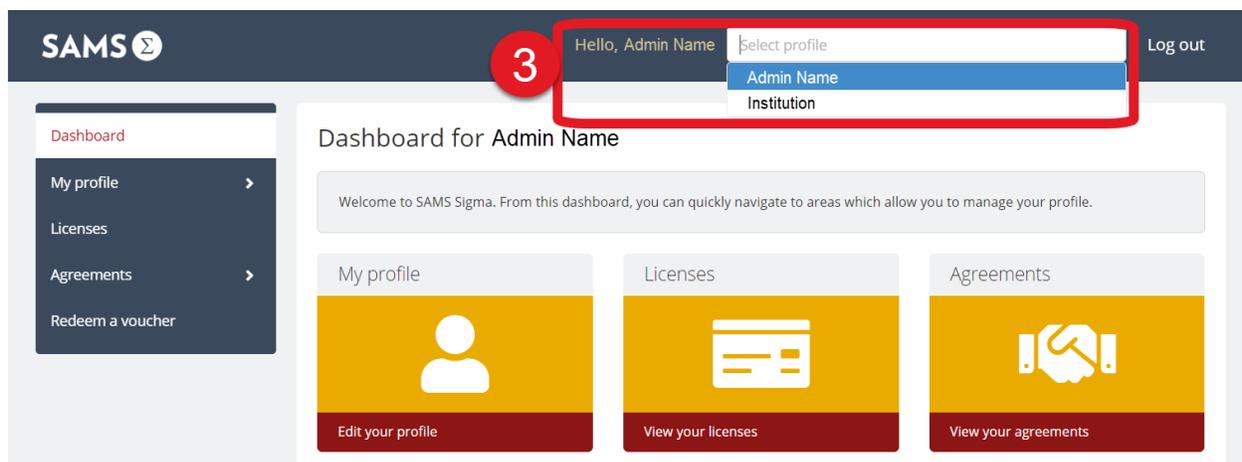
Logging in to Your Admin Account

The SAMS Sigma Administration Portal allows administrators for view account information and download usage statistics for AccessEngineering and AccessScience. Use the following instructions to log in to the Admin Portal.

1. Go to <https://sams-sigma.com/app/login?publisherId=66>
2. Enter your admin username and password to log in.
 - a. If you do not know your password, use the “Forgot Password” link to send a reset email to your admin email address.
 - b. If you do not know your username or admin email address, please contact Customer Success (customersuccess@mheducation.com).



3. Use the dropdown menu next to the “Hello...” text in the header to switch from your individual admin account to the institution’s account.



4. You will now have access to the institutional account menu on the left. The next sections of this guide cover the available admin functions.

The screenshot displays the SAMS Sigma administrative interface. At the top left, the SAMS logo is visible. The top navigation bar includes the text "Hello, Admin Name administering" and a dropdown menu currently set to "Institution", with a "Log out" button on the right. A red circle with the number "4" is positioned above the left-hand navigation menu. This menu is highlighted with a red border and contains the following items: "Dashboard", "Organization profile", "Licenses", "Agreements", "Vouchers", and "Reports".

The main content area features a search bar labeled "Search Sigma..." with a "Search" button. Below the search bar is a green notification box stating "You are now administering Institution". The main heading is "Dashboard for Institution". A welcome message reads: "Welcome to SAMS Sigma. From this dashboard, you can quickly navigate to areas which allow you to manage Institution's profile."

Three primary action cards are displayed:

- Organization profile:** Includes an icon of three people and the text "Manage profile details for your organization".
- Licenses:** Includes an icon of an envelope and the text "View license agreements for your organization".
- Agreements:** Includes an icon of a handshake and the text "Manage agreements for your organization".

Institutional Account Details

From the institutional account menu, you can view details of your institution's account and subscriptions.

1. Under "Organization Profile" select "Details" to view or edit the following information for your institution:
 - a. Organization Name
 - b. Website
 - c. Contact email address
2. If you make any changes on the "Details" page, scroll to the bottom and click the "Update details" button to save your changes.

The screenshot displays the SAMS Institutional Account Details page. The top navigation bar includes the SAMS logo, a user greeting 'Hello, Admin Name administering', a dropdown menu set to 'Institution', and a 'Log out' button. The left sidebar menu is expanded to show 'Organization profile' with a red box and the number '1' around it, and 'Details' is selected. The main content area is titled 'Basic details' and contains the following fields:

- Organization name***: Input field containing 'Example Institution'. A red callout 'a' points to this field.
- ISNI**: Empty input field.
- Website**: Input field containing 'http://library.example.edu'. A red callout 'b' points to this field.
- Ringgold ID**: Input field containing 'e.g. RIN 1234'.
- Legacy SAMS Account ID**: Empty input field.

Below the 'Basic details' section is the 'Contact details' section, which includes:

- Contact email address**: Input field containing 'library@example.edu'. A red callout 'c' points to this field.

3. Under "Licenses" you can see the following details on your institution's subscriptions:
 - a. License type (trial or subscription)
 - b. Licensed content (AccessEngineering or AccessScience)
 - c. Start and End date of subscription
 - d. Click the "Inactive" tab to view information for prior subscriptions

Dashboard

Organization profile

Licenses

Agreements

Vouchers

Reports

3

All

Search Sigma...

Search

Licenses for Institution

Licenses

Licenses your organization holds grant your organization access to content on licensed websites. There are various restrictions on licenses that define their terms of use.

Active

Inactive

d

Showing 2 results

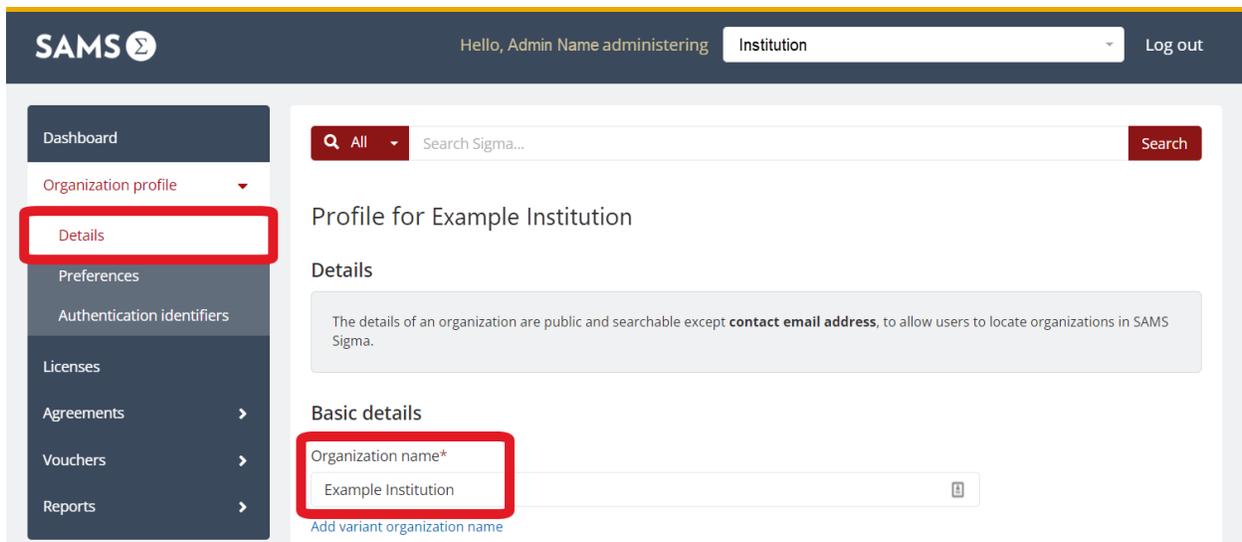
a	License Type	b Licensed Content	Start date	c End date	Provided By	Reporting Consortium	Action(s)
	Subscription	Content Bundle: AccessEngineering including DataVis	01 Jul 2021	30 Jun 2024			View
	Subscription	Content Bundle: AccessScience Full Access	25 Jul 2021	30 Jun 2023			View

Setting Preferences and Branding

There are several options available to personalize your subscriptions and add your institution's branding.

Display Name or Logo

1. The AccessEngineering and AccessScience sites will display a message in the header to your users that states "Access via [Your Institution's Name]". The name that will display here is the organization name as entered in SAMS Sigma.
 - a. To change your organization name, select "Organization Profile" from the left menu and go to the "Details" section. The "Organization Name" field will be at the top of this page.
 - b. If you make any changes on the Details page, scroll to the bottom and click the "Update details" button to save your changes.



The screenshot shows the SAMS Sigma user interface. At the top, there is a header with the SAMS logo, a user greeting "Hello, Admin Name administering", a dropdown menu for "Institution", and a "Log out" button. On the left side, there is a navigation menu with items: "Dashboard", "Organization profile" (with a dropdown arrow), "Details" (highlighted with a red box), "Preferences", "Authentication identifiers", "Licenses", "Agreements" (with a right arrow), "Vouchers" (with a right arrow), and "Reports" (with a right arrow). The main content area is titled "Profile for Example Institution" and "Details". Below the title, there is a search bar with "All" and "Search Sigma..." and a "Search" button. A message box states: "The details of an organization are public and searchable except **contact email address**, to allow users to locate organizations in SAMS Sigma." Under the "Basic details" section, there is a text input field for "Organization name*" containing "Example Institution" (highlighted with a red box) and a small icon to the right. Below the field is a link that says "Add variant organization name".

2. Instead of the organization name, you may choose to display a logo in the site header. To add or change your institution's logo, select "Organization Profile" from the left menu and go to the "Preferences" section.
 - a. Click "Update logo" to upload your organization's logo. The logo can be supplied as a .gif, .png, .jpg, or .jpeg file, and must measure between 10 and 800 pixels width and 10 and 800 pixels length.
 - b. Once you upload your logo, a preview will appear on the "Preferences" page.

The screenshot displays the SAMS (Sigma) user interface. At the top, the header includes the SAMS logo, a user greeting "Hello, Admin Name administering", a dropdown menu for "Institution", and a "Log out" link. The left sidebar contains a navigation menu with items: Dashboard, Organization profile (expanded), Details, Preferences (highlighted with a red box), Authentication identifiers, Licenses, Agreements, Vouchers, and Reports. The main content area is titled "Profile for Example Institution" and includes a search bar. Below the search bar, there are sections for "Preferences" (with a note: "Profile preferences allow you to set extra optional information for your organization.") and "Organization logo" (displaying the "Mc Graw Hill" logo). At the bottom of the logo section, there are two buttons: "Update logo" (indicated by a red arrow) and "Remove logo". A small text note below the logo states: "Logos can be supplied as .gif, .png, .jpg, or .jpeg files, must have the file extension indicating which of these file types they are, and should measure between 10 and 800 pixels width, and 10 and 800 pixels height."

Proxied Links

1. Both AccessEngineering and AccessScience provide the option to add your proxy server prefix or suffix to create proxied content links on the sites. The proxied links will appear when a user clicks "Share" to get a direct link for a content item.
2. To add your proxy information, select "Organization Profile" from the left menu, then go to the "Details" section.
 - a. Scroll down towards the bottom of the Details page, where you will find a field for "Proxy Server Prefix" and "Proxy Server Suffix".
 - b. Enter the appropriate information here (ex: `http://ezproxy.example.edu/login?url=` OR `https://example.idm.oclc.org/login?url=`)
 - c. Scroll to the bottom of the page and click "Update details" to save your changes.
3. If you are setting up proxy server access for the first time, please see the section on [Authentication Identifiers](#) to ensure correct setup.

SAMS Hello, Admin Name administering Institution Log out

Dashboard
Organization profile
Details
Preferences
Authentication identifiers
Licenses
Agreements >
Vouchers >
Reports >

Basic details

Proxy Server Prefix 

Proxy Server Suffix 

Profile Notes

OpenURL (AccessScience only)

1. On the AccessScience site, links to external content have the option of including an OpenURL link. AccessEngineering does not have OpenURL available.
2. To add your OpenURL resolver, select "Organization Profile" from the left menu and go to the "Preferences" section. There will be a field to add your "Resolver URL", select the "Version", and upload an OpenURL icon (optional).
 - a. The optional OpenURL icon can be supplied as a .gif, .png, .jpg, or .jpeg file and must measure between 2 and 300 pixels width and 2 and 300 pixels length.

SAMS Hello, Admin Name administering Institution Log out

Dashboard
Organization profile
Details
Preferences
Authentication identifiers
Licenses
Agreements >
Vouchers >
Reports >

Organization logo

No logo set
Logos can be supplied as .gif, .png, .jpg, or .jpeg files, must have the file extension indicating which of these file types they are, and should measure between 10 and 800 pixels width, and 10 and 800 pixels height.
Update logo

OpenURL

Resolver URL 

Version
 Clear
Update OpenURL

 
Logos can be supplied as .gif, .png, .jpg, or .jpeg files, must have the file extension indicating which of these file types they are, and should measure between 2 and 300 pixels width, and 2 and 300 pixels height.
Update OpenURL icon
Remove OpenURL icon

Authentication Identifiers

There are several different methods of authentication available for providing access to your users. From SAMS Sigma, you can view and edit any of your authenticators. Please contact Customer Success (customersuccess@mheducation.com) if you need assistance with this process.

See the authentication guides for more information on available methods:

- [AccessEngineering Authentication Guide](#)
- [AccessScience Authentication Guide](#)

IP Ranges

1. Users accessing the site from within an IP range indicated on the account are automatically authenticated.
2. IP ranges will be listed with the start and end address. Existing ranges can be deleted, or new ranges can be added using the buttons shown below.
3. To enter an IP range, enter the start and end address in the appropriate fields. To enter a single IP address, enter that address in both the start and end fields.

The screenshot displays the SAMS Sigma administration interface. At the top, the user is logged in as 'Admin Name administering' for an 'Institution'. The left sidebar contains navigation options: Dashboard, Organization profile, Details, Preferences, Authentication identifiers (highlighted with a red box), Licenses, Agreements, Vouchers, and Reports. The main content area is titled 'Profile for Institution' and features an 'Authentication identifiers' section. A text box explains that these identifiers are used as credentials for logging into licensed websites. Below this, the 'IP ranges' section shows a single range: '152.208.0.0 - 152.208.255.255' with a 'Delete' button. An 'Add new IP range' button is also present. A form for adding a new range includes fields for 'Start address*' (192.168.120.150) and 'End address*' (192.168.120.150), with 'Save' and 'Cancel' buttons.

Username and Passwords

1. Users can log in directly on the site using a general site username and password. See instructions for users here: [AccessEngineering UN/PW Guide](#); [AccessScience UN/PW Guide](#)
2. Existing username/password combinations can be deleted, or new combinations can be added. The admin view does not show the password, only the username.
3. To enter a new username/password, enter the information in the appropriate fields. You may receive an error message if the username already exists in the system and will need to create a different username.

SAMS Hello, Admin Name administering Institution Log out

Dashboard
Organization profile
Details
Preferences
Authentication identifiers
Licenses
Agreements
Vouchers
Reports

IP ranges

152.208.0.0 - 152.208.255.255 Delete

Add new IP range

Username and passwords

exinstngr | ***** Delete

exinstsci | ***** Delete

Add new username and password

Organization username*

Organization password*

Save Cancel

Shibboleth Identifiers

1. AccessEngineering and AccessScience support Shibboleth/Open Athens authentication. See instructions for users here: [AccessEngineering Shibboleth Guide](#); [AccessScience Shibboleth Guide](#)
2. To set up Shibboleth/Open Athens, click “Add new Shibboleth identifier”. You can also edit or delete existing Shibboleth identifiers.
3. The required fields are “Organization identifier” (ex: example.org) and “Entity ID” (ex: <https://idp.example.org/shibboleth>). A WAYFless URL can also be provided upon request.

SAMS Hello, Admin Name administering Institution Log out

Dashboard
Organization profile
Details
Preferences
Authentication identifiers
Licenses
Agreements
Vouchers
Reports

Shibboleth identifiers

test.ukfederation.org.uk | https://test-idp.ukfederation.org.uk/idp/shibboleth Edit Delete

Add new Shibboleth identifier

Organization identifier*

Entity ID*

Save Cancel

Trusted referrer URLs

Trusted Referrer URLs

1. Users who click on a link to AccessEngineering or AccessScience from the referrer site will be automatically authenticated.
2. The referrer site must be behind a secure login, for example a learning management system (LMS) or intranet site.
3. To set up a referrer URL, enter the base URL in the field provided (ex: *https://example.instructure.com/* NOT *https://example.instructure.com/courses/*)
4. **DO NOT** edit or remove the trusted referrer URL “*http://scholar.google.com/case/mhe/xxxx*”. That URL is tied to the remote access authentication for the sites.

The screenshot shows the SAMS Admin interface. The top navigation bar includes the SAMS logo, a user greeting, an institution dropdown, and a log out button. The left sidebar contains navigation links: Dashboard, Organization profile, Details, Preferences, Authentication identifiers (highlighted with a red box), Licenses, Agreements, Vouchers, and Reports. The main content area is titled 'Trusted referrer URLs' and contains a table of three entries. The first entry is 'http://scholar.google.com/casa/mhe/10943', which is highlighted with a red box. The second entry is 'https://spark.mcgrawhill.com/' and the third is 'https://www.mhprofessional.com/'. Each entry has 'Edit' and 'Delete' buttons. The 'Delete' button for the first entry is crossed out with a red 'X'. A red arrow points to the 'Add new trusted referrer' button. Below the table is a form to add a new URL, with a text input field containing 'https://' and 'Save' and 'Cancel' buttons.

Library Card (*AccessScience only*)

1. Institutions using Library Card login must register the bar codes by providing the bar code prefix, length of the codes, and link to the bar code validation from a registered referring URL/domain.
2. The site will verify that bar codes conform with the rules and provide access to users who provide valid bar codes.
3. To set up Library Card authentication, please contact Customer Success (customersuccess@mheducation.com) for assistance.

Usage Reports

COUNTER usage statistics reports are available for AccessEngineering and AccessScience through the SAMS Sigma admin portal. You can download reports directly or set up scheduled reports to be emailed to you. SUSHI harvesting is also supported.

Downloading Usage Reports

1. To download usage reports, go to the “Reports” section from the left menu and select “COUNTER”.
2. If you do not see a “Reports” option on the left menu, please ensure that you are in the institutional account as described in the section on [Logging In](#).
3. Select the report type from the dropdown menu, set the start and end date, and then click “Download report”.
4. See the section on [Available Usage Reports](#) for more details on reports.

The screenshot displays the SAMS Sigma admin portal interface. At the top, the SAMS logo is on the left, and the user's name and institution are on the right. The left sidebar contains a menu with options like Dashboard, Organization profile, Licenses, Agreements, Vouchers, Reports, Voucher report, and Scheduled reports. The 'COUNTER' option under 'Reports' is highlighted with a red box and a red circle containing the number 1. The main content area is titled 'Reports for Institution' and shows a 'COUNTER report' configuration form. The form has two tabs: 'Report Configuration' (active) and 'Saved Configurations'. Below the tabs, there is a text box explaining that all Counter R5 reports will include data from Jan 2021 onwards only. The form includes a dropdown menu for 'COUNTER report type*' (with a red circle containing the number 3), checkboxes for 'Include Zero Rows' and 'Use Dynamic Date Range', date pickers for 'Reporting start date*' and 'Reporting end date*', and radio buttons for 'File format*' (selected 'csv'). A 'Download report' button is highlighted with a red box at the bottom.

Setting Scheduled Reports

1. Reports can be scheduled to be sent to a specified email address covering a rolling time window.
2. To schedule a report, go to the “Reports” section from the left menu and select “COUNTER”.
3. Select the report type from the dropdown menu. Check the box for “Use Dynamic Date Range” and select the rolling time window for your scheduled reports (last X months).
4. Enter a “Configuration name” in the field at the bottom of the screen and click “Save configuration”.
5. You can view and edit saved report configurations from the “Saved Configurations” tab under “COUNTER”.

The screenshot displays the SAMS web interface for configuring a COUNTER report. The left sidebar shows the navigation menu with 'COUNTER' selected. The main content area is titled 'COUNTER report' and features a 'Report Configuration' section with a 'Saved Configurations' tab. The configuration options include: 'COUNTER report type*' set to 'PR_P1 : Platform Usage', 'Use Dynamic Date Range' checked, 'Dynamic date range*' set to 'Last 6 months', and 'File format*' set to 'csv'. The 'Configuration name*' field contains '6 Month PR' and the 'Save configuration' button is visible. Red boxes and numbers (2, 3, 4, 5) highlight key elements: 'COUNTER' in the sidebar, 'Saved Configurations' tab, 'Use Dynamic Date Range' checkbox, 'Save configuration' button, and the 'Saved Configurations' tab again.

6. Once you have saved the configuration, go to the “Scheduled reports” section from the left menu under “Reports”.
7. Click “Create new schedule” and search for the “Configuration name” you just created. You will also need to enter a name in the “Scheduled report name” field.
8. Enter the email address where you would like to receive the reports or enter a “Host” and “Remote path” for FTP upload.
9. Select the “Schedule frequency” at which you want to receive reports (Once, Daily, Weekly, or Monthly) and the day of month and time at which the report should be sent.
10. Click “Save scheduled report” to save your options.

SAMS  Hello, Admin Name administering Institution Log out

Dashboard

Organization profile >

Licenses

Agreements >

Vouchers >

Reports >

Voucher report >

Scheduled reports 6

COUNTER

Create scheduled report

Scheduled report name*
 7

Configuration name*

Delivery Options

Email

Email address* 8

Upload via FTP

Scheduling options

Schedule frequency*
 Clear

Please choose month day and time (UTC).

9 Clear :

Save scheduled report

11. You can edit or delete existing scheduled reports and see when the next run time will occur from the main "Scheduled reports" page.

SAMS  Hello, Admin Name administering Institution Log out

Dashboard

Organization profile >

Licenses

Agreements >

Vouchers >

Reports >

Voucher report >

Scheduled reports

COUNTER

Search

Reports for Institution

Create new schedule

You can use scheduled reports to run your saved report configurations automatically at a set point of time in the future.

Showing 1 result

Scheduled report name	Last modified by	Report configuration name	Report configuration type	Delivery option	Next run time	Edit	Delete
6 Month PR	admin	6 Month PR	COUNTER5	Emailed	15 Jun 2022, 00:00	Edit	Delete

SUSHI Harvesting Information

1. To obtain COUNTER 5 usage reports via a SUSHI connection, please use the following information:
 - a. SUSHI API UI: <https://c5sushiapi.mpsinsight.com/login/sushi>
 - b. SUSHI SERVICE URL: <https://c5sushi.mpsinsight.com/c5sushi/services>
 - c. API KEY: (find this in the Organization Profile Details section- see step #2 below)
 - d. CUSTOMER ID: (SAMS ID from step #3 below)
2. To find your API key, go to the “Organization Profile” section from the left menu, select “Details” and scroll down to the field called “mps-insight-api-key” (towards the bottom of the page).

The screenshot shows the SAMS user interface. At the top, there is a header with the SAMS logo, the user name 'Hello, Admin Name administering', a dropdown menu for 'Institution', and a 'Log out' button. On the left side, there is a navigation menu with options: Dashboard, Organization profile (expanded), Details (highlighted with a red box), Preferences, Authentication identifiers, Licenses, Agreements, Vouchers, and Reports. The main content area has a search bar and a list of fields. The 'mps-insight-api-key' field is highlighted with a red box, and a red arrow points from a circled '2' to it. Below this field is another field containing 'mhe::3e8b4d825a496ceeac43f3311b20f86b'. There is also a field with 'test-123' and an 'Update details' button at the bottom.

3. To find your SAMS ID, look for the number that appears next to your organization’s name at the top of the “Details” page.

The screenshot shows the SAMS user interface for the 'Details' page of an organization. At the top, there is a header with the SAMS logo, the user name 'Hello, Admin Name administering', a dropdown menu for 'Institution', and a 'Log out' button. On the left side, there is a navigation menu with options: Dashboard, Organization profile (expanded), Details (highlighted with a red box), Preferences, Authentication identifiers, Licenses, Agreements, Vouchers, and Reports. The main content area has a search bar with 'Search Sigma...' and a 'Search' button. Below the search bar, the organization name 'Profile for McGraw Hill (organization)' is displayed next to the SAMS ID '10943', which is highlighted with a red box and a red arrow pointing from a circled '3'. Below this, there is a 'Details' section with a note: 'The details of an organization are public and searchable except **contact email address**, to allow users to locate organizations in SAMS Sigma.' Underneath, there is a 'Basic details' section with a field for 'Organization name*' containing 'McGraw Hill (organization)' and a link 'Add variant organization name'.

4. For your reference: [MPS Insights SUSHI Guide](#)
5. If you need SUSHI information for COUNTER 4 reports, please contact Customer Success (customersuccess@mheducation.com)

Available Usage Reports

COUNTER 5

IMPORTANT NOTES:

- Data for COUNTER 5 reports is not available until **9 business days** after the end of a given month.
- COUNTER 5 reports were released in February 2021 and only have data going back to **January 1, 2021**. AccessEngineering multimedia usage data is only available starting with June 2021 data.
- All COUNTER 5 reports contain data for both AccessEngineering and AccessScience, each report has a column for “Platform” that can be used to filter to an individual site.

Report Name	AccessEngineering Report Contents	AccessScience Report Contents
IR	<ul style="list-style-type: none"> • Shows total item requests for specific book chapters or sections, spreadsheets, case studies, DataVis projects, tutorials, and videos • Filter by “Data Type” to see usage by content type (“Book” = chapter/section; “Other”= Spreadsheets, Case Studies, DataVis Projects, Tutorials; “Multimedia”= Videos) 	<p>Primary usage report</p> <ul style="list-style-type: none"> • Shows requests for individual content items • There will be 6 rows for each item (one for each metric type) • Filter by “Data Type” to see usage by content type (“Book” = Articles; “Other”= Briefings, News, Biographies, Projects; “Multimedia”= Videos, Animations)
IR_A1	<ul style="list-style-type: none"> • Shows no data for AccessEngineering since there are no Articles in the platform 	<ul style="list-style-type: none"> • Pre-filtered version of the IR report, showing only total item requests for individual AccessScience articles
IR_M1	<ul style="list-style-type: none"> • Pre-filtered version of the IR report, showing only total item requests for videos 	<ul style="list-style-type: none"> • Pre-filtered version of the IR report, showing only total item requests for individual videos and animations
PR	<ul style="list-style-type: none"> • Shows platform totals for investigations and requests by data type, as well as showing platform searches • One row for each metric, separated by “Data Type” (see definitions in TR report below) • Row for “Total Item Requests” for each data type shows the total number of items accessed (book chapters, other content, videos) 	<ul style="list-style-type: none"> • Shows platform totals for investigations and requests by data type, as well as showing platform searches • One row for each metric, separated by “Data Type” (see definitions in IR report above) • Row for “Total Item Requests” for each data type shows the total number of items accessed (articles, other content, videos)
PR_P1	<ul style="list-style-type: none"> • Pre-filtered version of the PR report, showing only searches, item requests, and unique title requests 	<ul style="list-style-type: none"> • Pre-filtered version of the PR report, showing only searches and total item requests

	<ul style="list-style-type: none"> • “Title Requests” metric is for book content only, “Item Requests” metric includes book content along with other content • Comparing “Total” vs. “Unique” item requests shows if specific content is being view multiple times or by multiple users • Also includes a “Searches Platform” metric giving the total number of searches performed 	<ul style="list-style-type: none"> • Comparing “Total” vs. “Unique” item requests shows if specific content is being view multiple times or by multiple users • Also includes a “Searches Platform” metric giving the total number of searches performed
TR	<p>Primary usage report</p> <ul style="list-style-type: none"> • Shows requests at the Chapter/Section level for books and for all other content types • There will be 6 rows for each title (one for each metric type) • Filter by “Data Type” to see non-book content usage (“Other”= Spreadsheets, Case Studies, DataVis Projects, Tutorials) 	<p>Not useful for AccessScience</p> <ul style="list-style-type: none"> • The entire platform appears in these reports as one “Title” (MH Access Science), with a row for each metric
TR_B1	<ul style="list-style-type: none"> • Pre-filtered version of the TR report, showing only item requests and unique title requests for book content • “Total Item Requests”= total number of individual chapter/sections accessed • “Unique Title Requests”= how many times each book was accessed, either by multiple users or in multiple sessions 	<p>Not useful for AccessScience</p> <ul style="list-style-type: none"> • The entire platform appears in these reports as one “Title” (MH Access Science), with a row for each metric
TR_B2	<ul style="list-style-type: none"> • Access denied/lockout report • Metrics for denials are “Limit exceeded” (for concurrency limits) or “No license” • Shows individual titles that users were trying to access 	<ul style="list-style-type: none"> • Access denied/lockout report • Metrics for denials are “Limit exceeded” (for concurrency limits) or “No license”

COUNTER 4

IMPORTANT NOTES:

- COUNTER 4 reports stopped collecting data as of **December 31, 2021** and should only be used for historical data.
- COUNTER 4 reports are listed at the bottom of the “Report Type” dropdown menu in SAMS Sigma.
- All COUNTER 4 reports contain data for both AccessEngineering and AccessScience, each report has a column for “Platform” that can be used to filter to an individual site.

Report Name	AccessEngineering Report Contents	AccessScience Report Contents
BR2	<p>Primary usage report</p> <ul style="list-style-type: none"> • Provides content retrievals per title (titles are defined by ISBN, so different editions are counted separately) • Report is sorted alphabetically by title, with the top row being “Total for all titles” • Section type is either “chapter” or “section” depending on how the book is subdivided 	<p>Not useful for AccessScience</p> <ul style="list-style-type: none"> • Provides total for all content retrievals as if AccessScience were one book title • Report will include two rows; one for “Total for all titles” and a second for “AccessScience” as the title (these should have the same value)
BR4	<ul style="list-style-type: none"> • Access denied to content items by month, platform and category (also known as a “turnaways” or “lockout” report) • Two categories of denials: “content item not licensed” and “concurrent/simultaneous user limit exceeded” • Should be zero if the institution has a subscription for the resource • Can be non-zero if institution subscribes with a concurrency limit 	<ul style="list-style-type: none"> • Access denied to content items by month, platform and category (also known as a “turnaways” or “lockout” report) • Two categories of denials: “content item not licensed” and “concurrent/simultaneous user limit exceeded” • Should be zero if the institution has a subscription for the resource • Can be non-zero if institution subscribes with a concurrency limit
TR3	<ul style="list-style-type: none"> • “Total for all titles” at top lists total item requests broken down by Page Type • “Sectioned PDF” page type shows PDF downloads • “Sectioned HTML – mobile format” page type shows any item viewed on a mobile device • “Sectioned HTML” page type shows views by specific chapter title (with a column for book ISBN) 	<p>Primary usage report</p> <ul style="list-style-type: none"> • Provides usage for individual content pages (identified by title and Proprietary Identifier) • Determine content type by the code in front of the Proprietary Identifier: <ul style="list-style-type: none"> ○ Articles= numerical code only for EST articles; YB for yearbook/archived articles

		<ul style="list-style-type: none"> ○ Other content: Briefing (BR), Animation/video (an); News (SN); Image gallery (IG); Biography (M); Video biography (VB); Project (pr) ● Page type is either “Full-text HTML” or “Full-text HTML- mobile format” ● Also a row for “Full-text Total” which will combine the two HTML counts
PR1	<ul style="list-style-type: none"> ● Records user interactions with the overall platform ● “Regular searches” includes any user entered search and “Results clicks” counts any content opened from search results ● “Record views” counts all content page types, however the user arrives to that page (from search, browse, internal link, etc.) ● Record views total will always be higher than results clicks, because results clicks are included in record views 	<ul style="list-style-type: none"> ● Records user interactions with the overall platform ● “Regular searches” includes any user entered search and “Results clicks” counts any content opened from search results ● “Record views” counts all content page types, however the user arrives to that page (from search, browse, internal link, etc.) ● Record views total will always be higher than results clicks, because results clicks are included in record views