SAMS Sigma Administration Portal Guide

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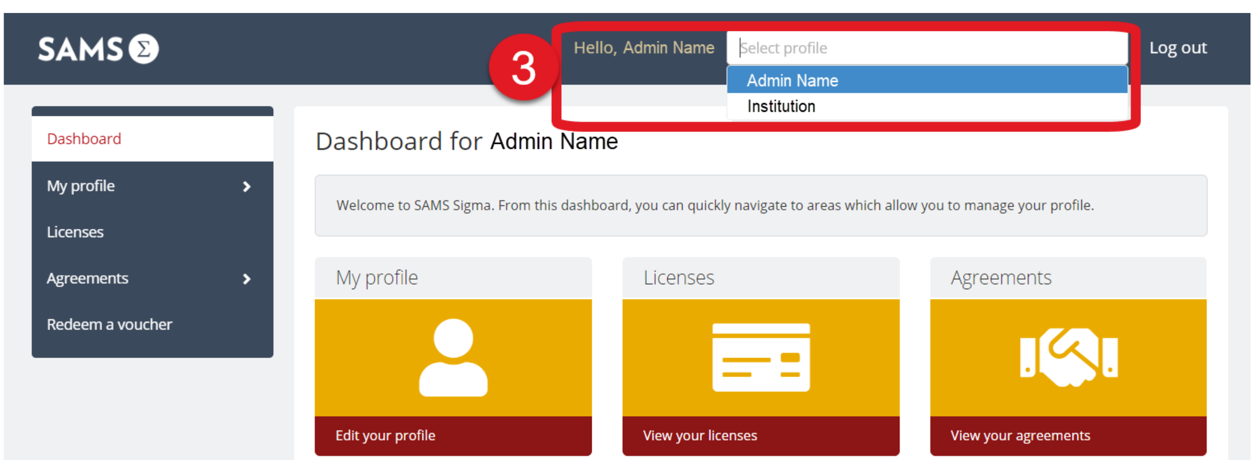
Logging in to Your Admin Account

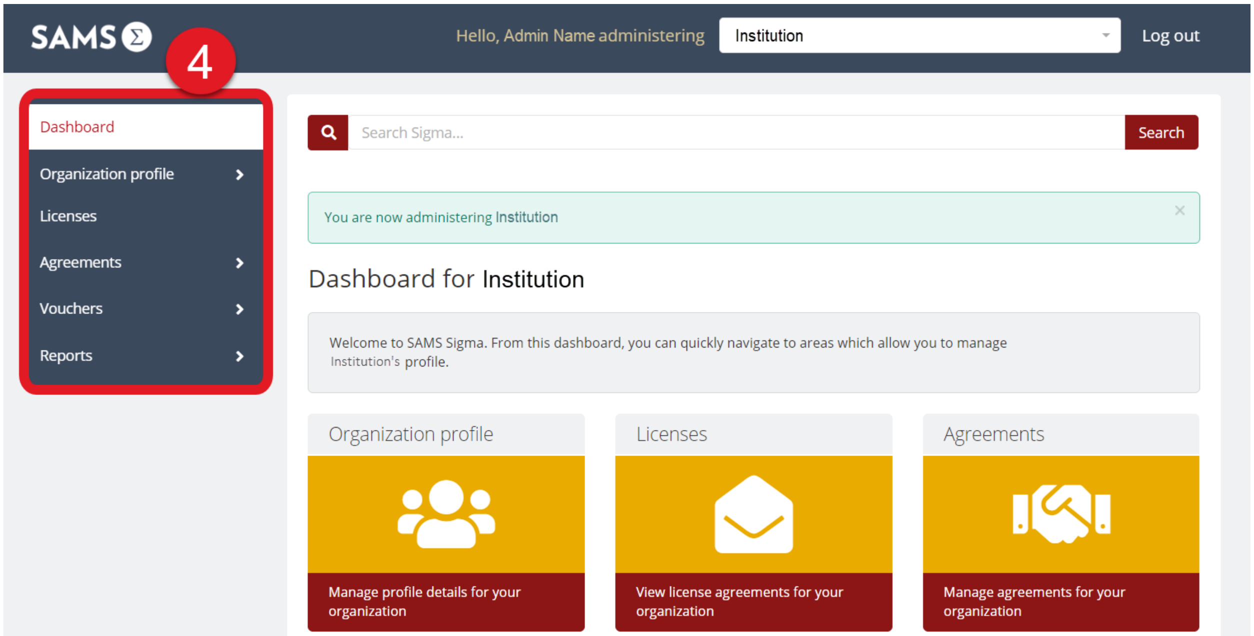
The SAMS Sigma Administration Portal allows administrators for view account information and download usage statistics for AccessEngineering and AccessScience. Use the following instructions to log in to the Admin Portal.

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.



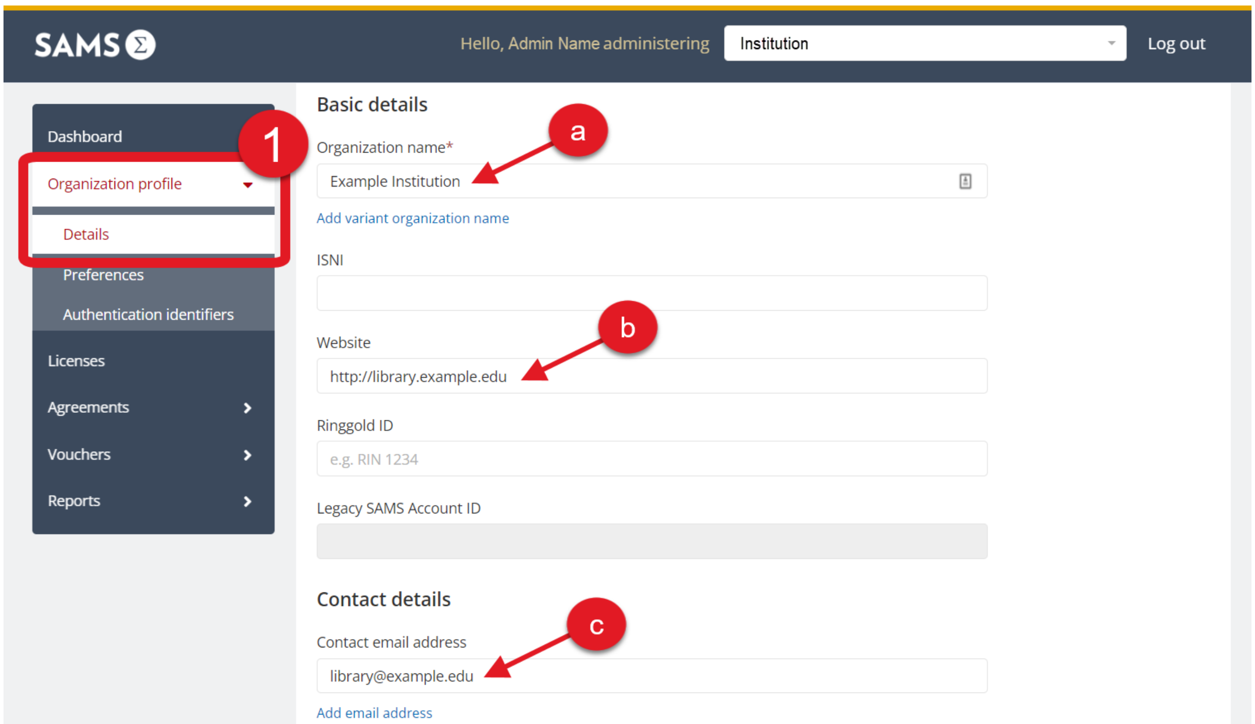
4. You will now have access to the institutional account menu on the left. The next sections of this guide cover the available admin functions.



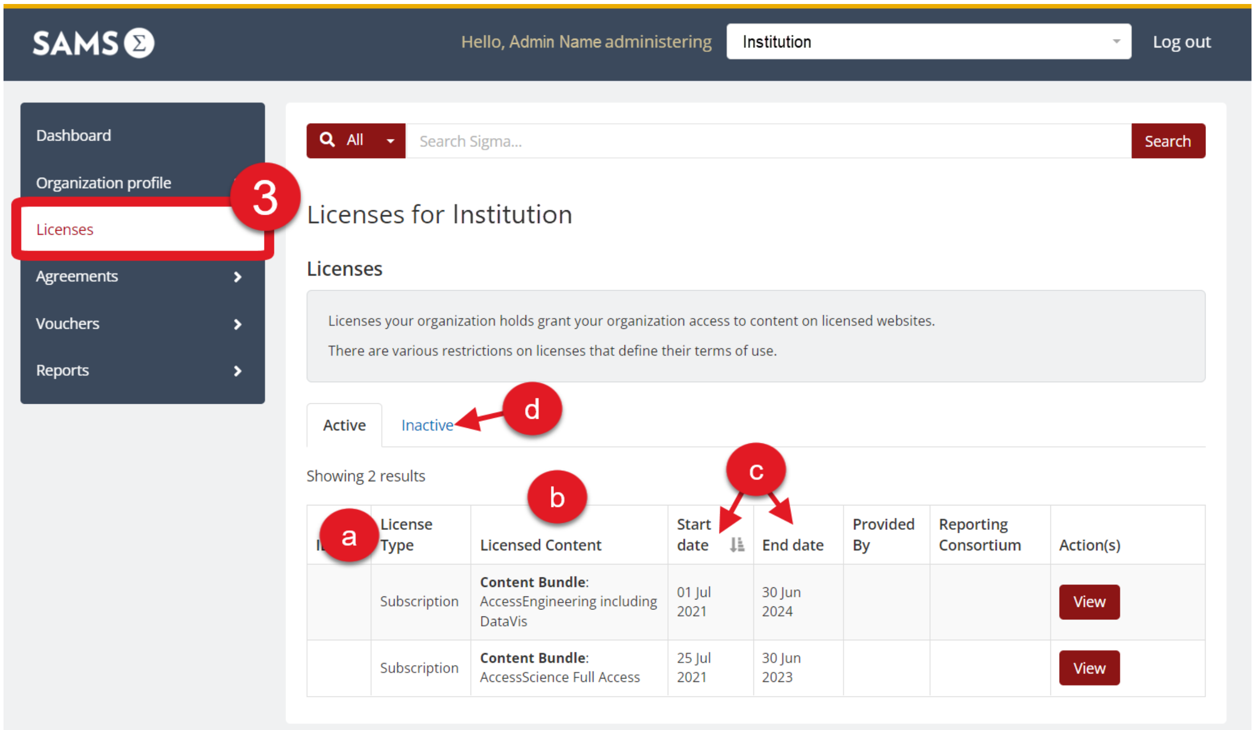
Institutional Account Details

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.



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

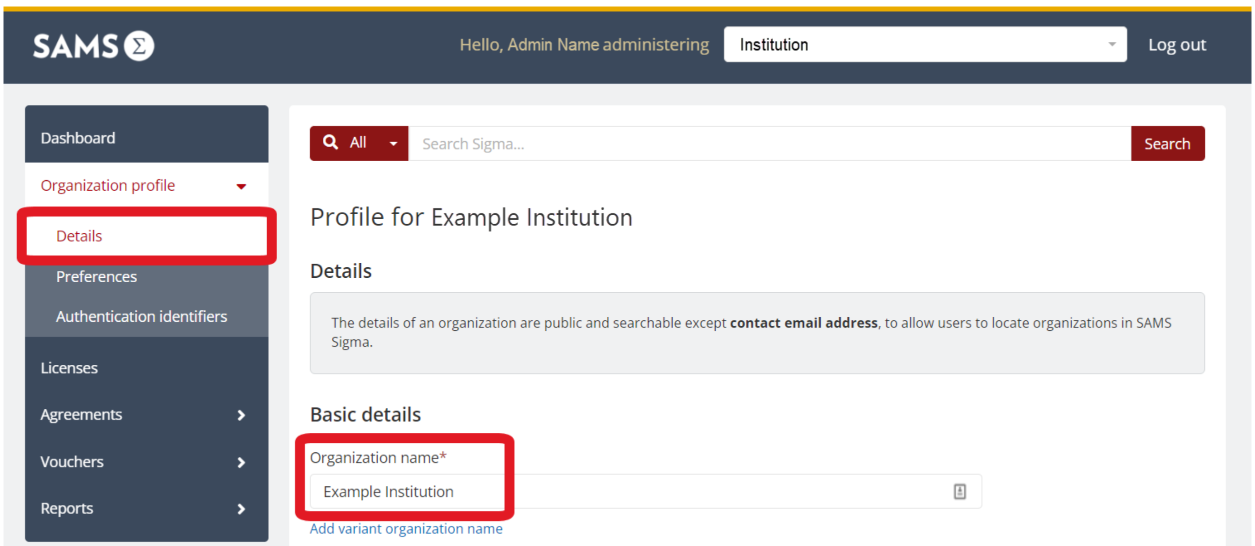

SAMS
Hello, Admin Name administering
Institution
Log out
Dashboard
Organization profile
Licenses
Agreements
Vouchers
Reports
3
All
Search Sigma...
Search
Licenses for Institution
Licenses
Licenses your organization holds grant your organization access to content on licensed websites.
There are various restrictions on licenses that define their terms of use.
Active
Inactive
d
Showing 2 results
a
b
c
License Type
Licensed Content
Start date
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

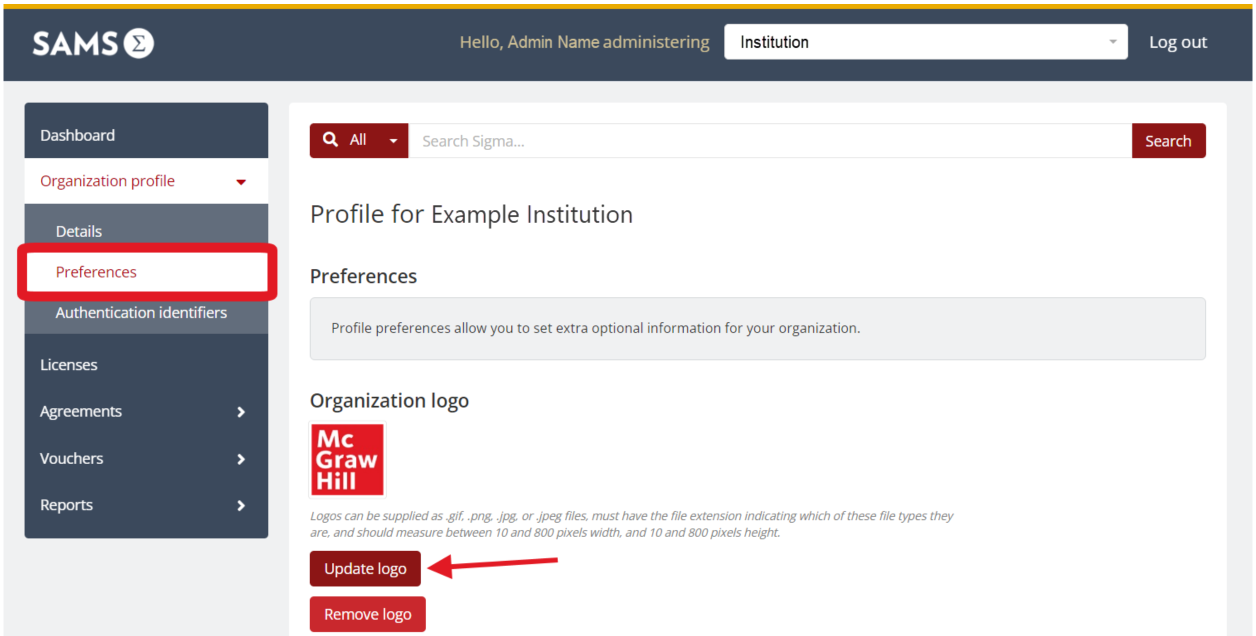
There are several options available to personalize your subscriptions and add your institution's branding.

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.

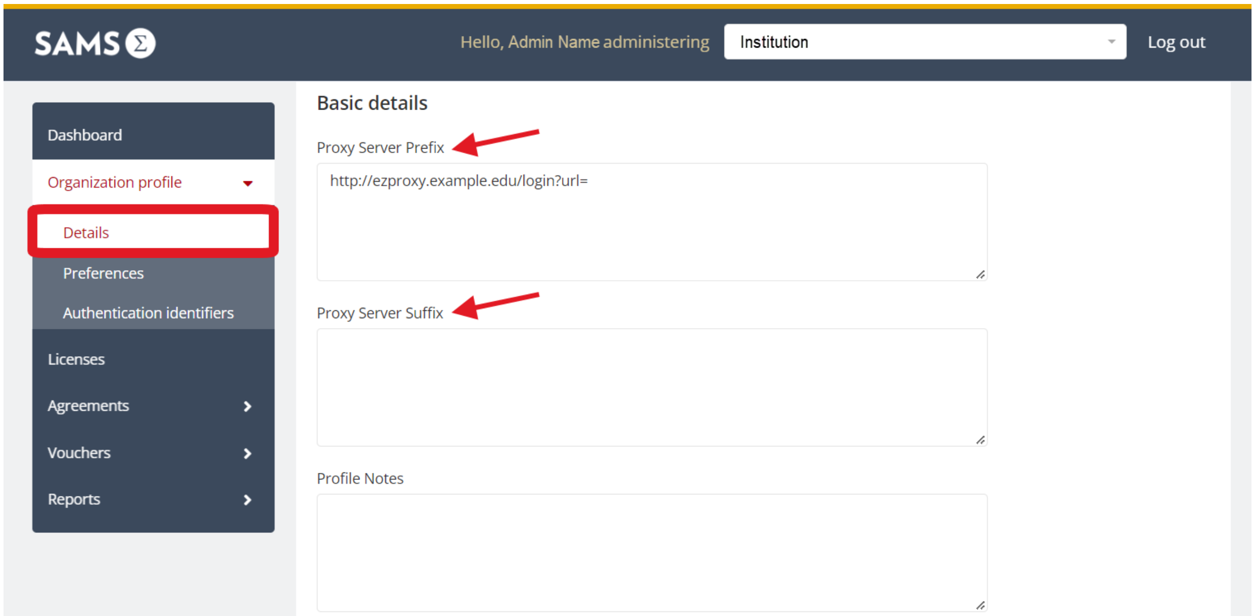


2. Instead of the organization name, you may choose to display a logo in the site header. To add or change your institution's logo, select "Organization Profile" from the left menu and go to the "Preferences" section.
    a. Click "Update logo" to upload your organization's logo. The logo can be supplied 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.



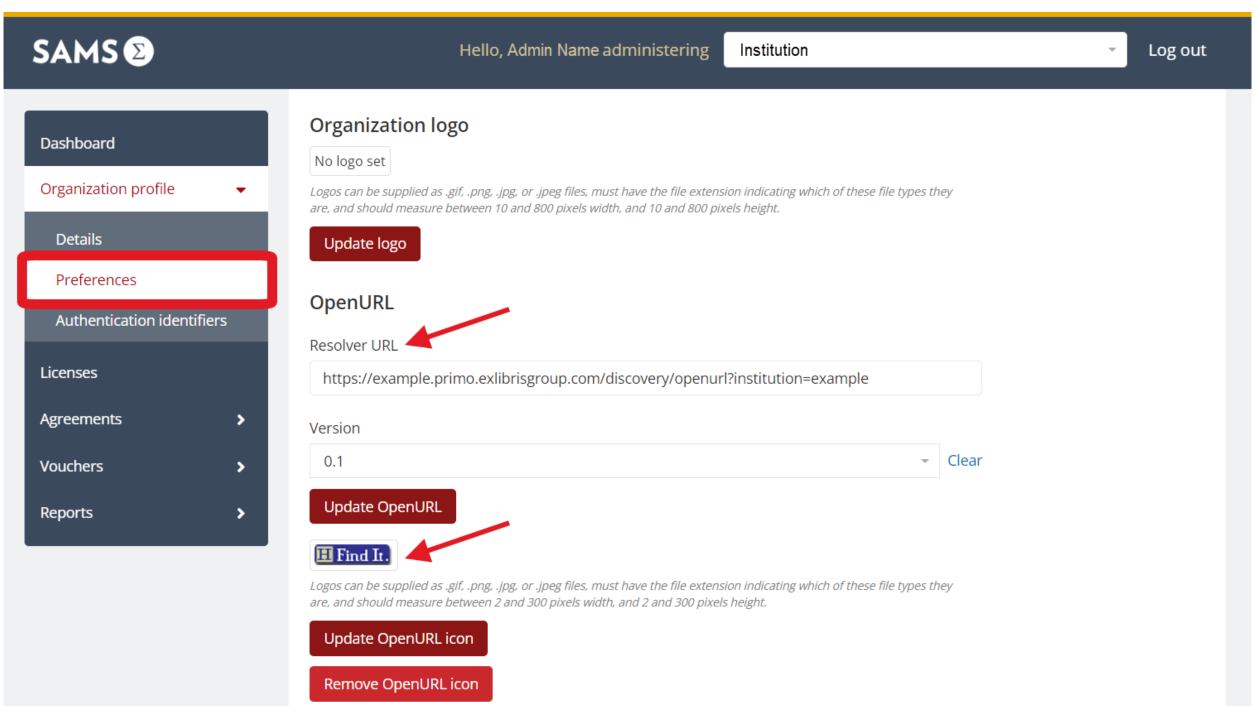
Proxied Links

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.



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.



Authentication Identifiers

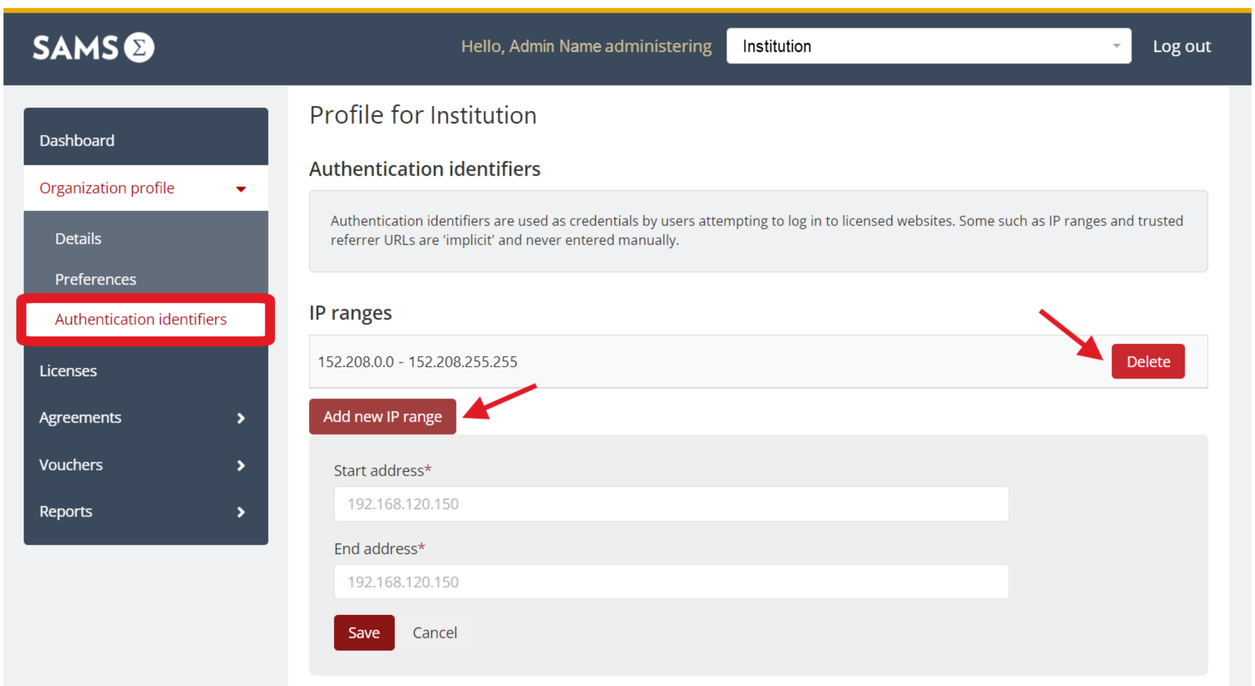
There are several different methods of authentication available for providing access to your users. From SAMS Sigma, you can view and edit any of your authenticators. Please contact Customer Success (customersuccess@mheducation.com) if you need assistance with this process.

See the authentication guides for more information on available methods:

- AccessEngineering Authentication Guide
- AccessScience Authentication Guide

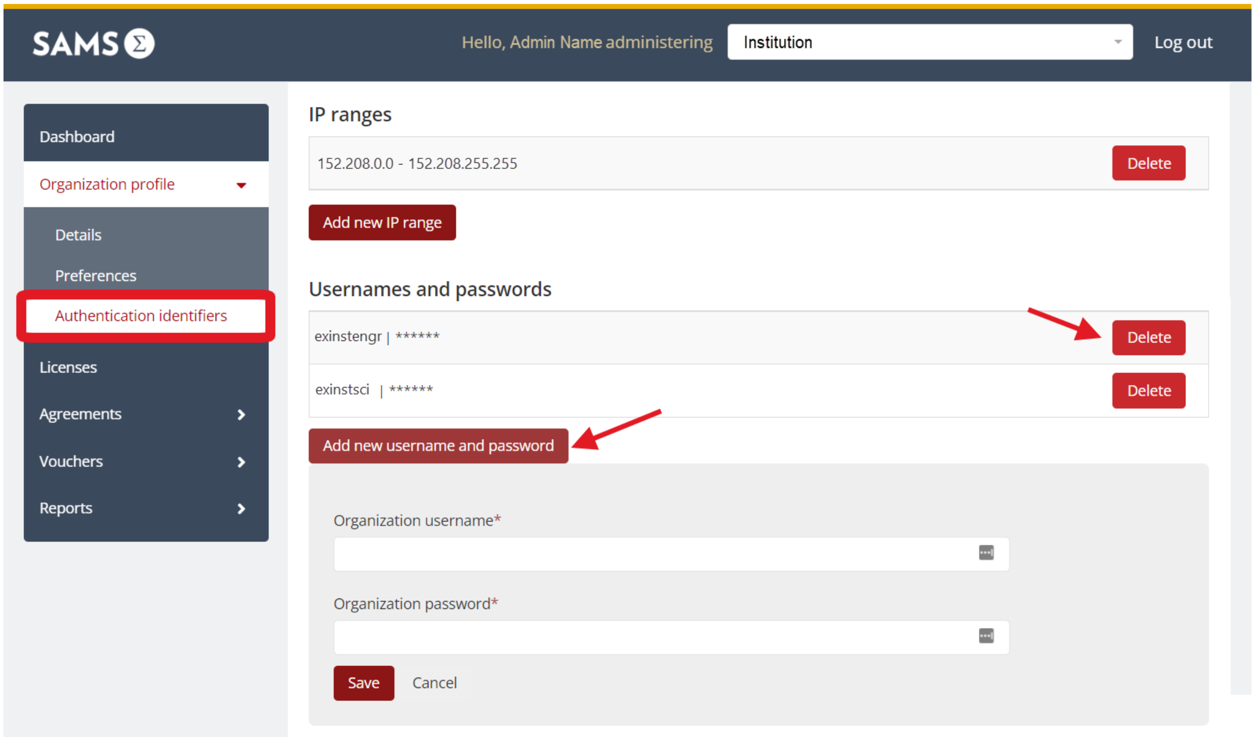
IP Ranges

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.



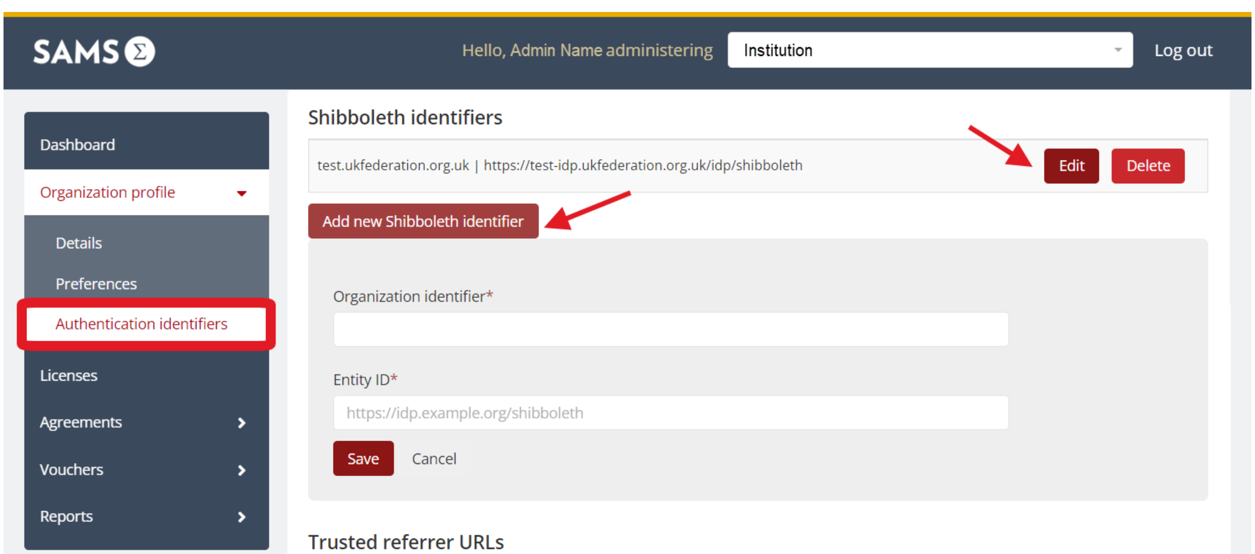
Usernames and Passwords

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.



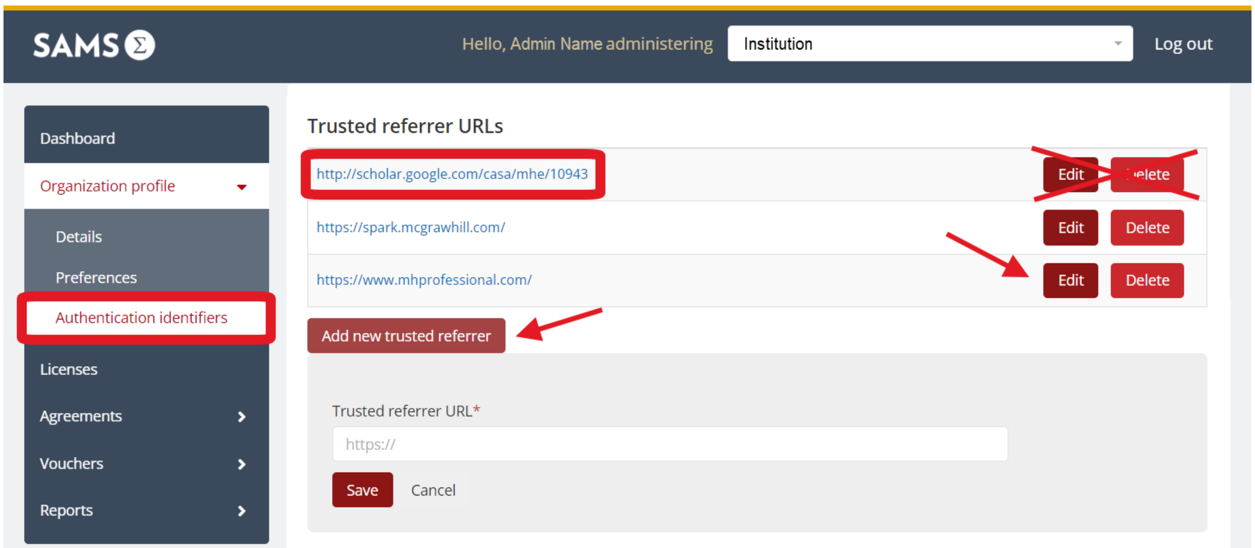
Shibboleth Identifiers

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.



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.



Library Card *(AccessScience only)*

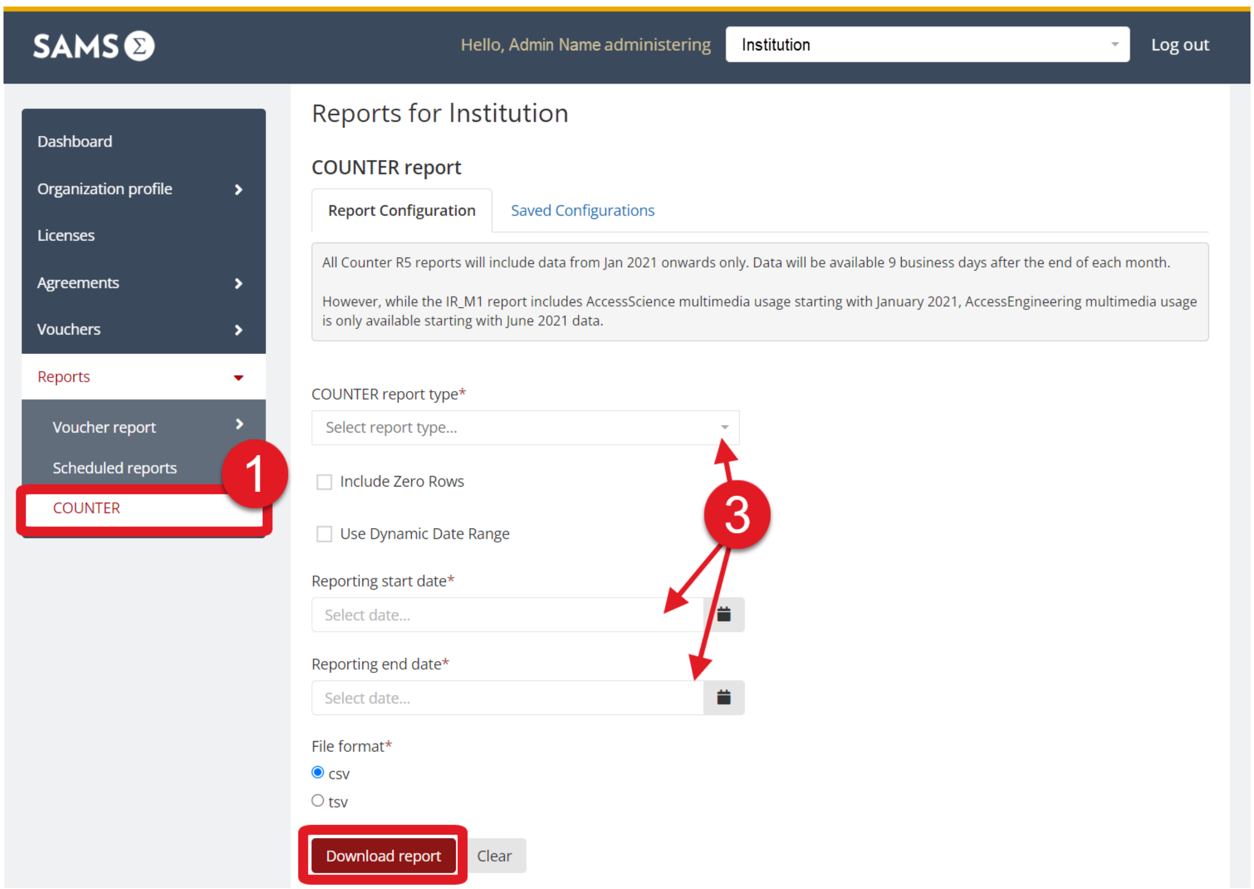
1. Institutions using Library Card login must register the bar codes by providing the bar code prefix, length of the codes, and link to the bar code validation from a registered referring URL/domain.
2. The site will verify that bar codes conform with the rules and provide access to users who provide 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.

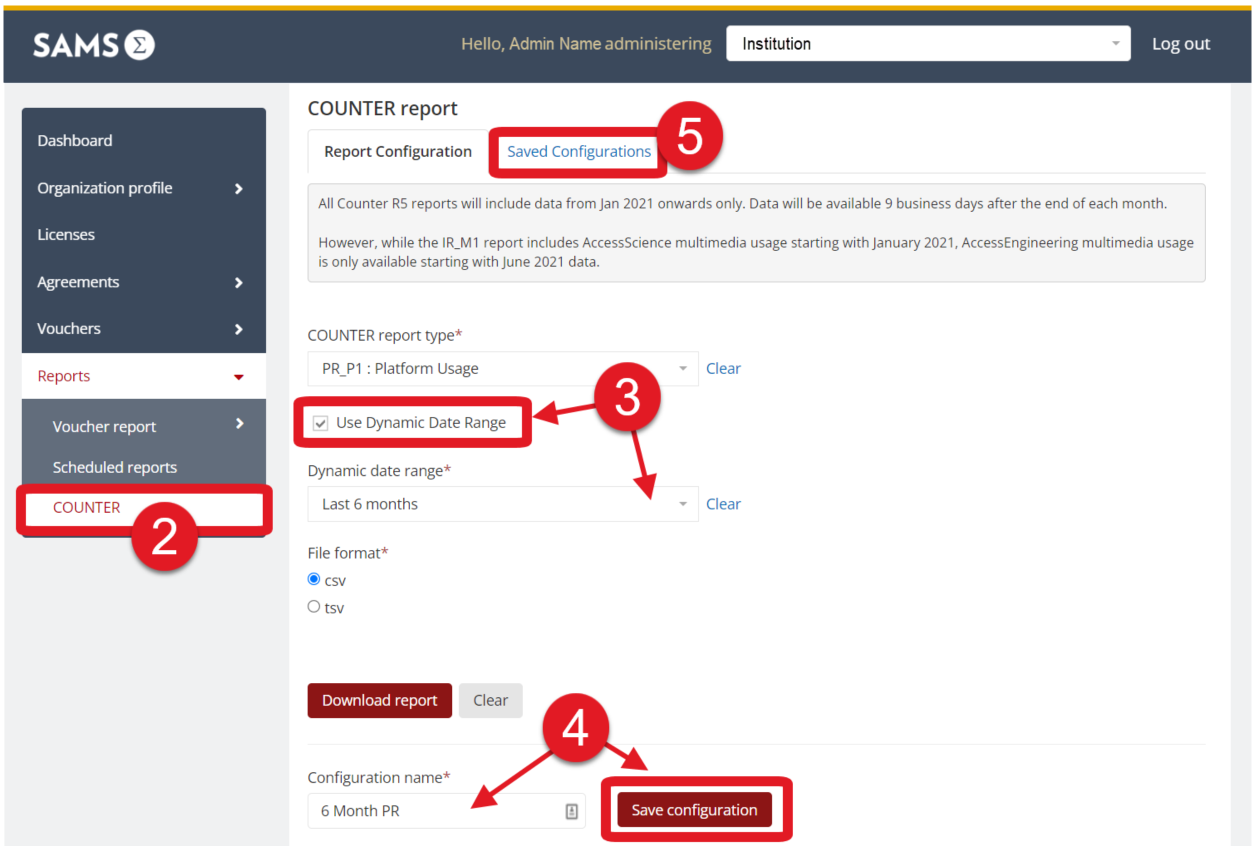
Downloading Usage Reports

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.

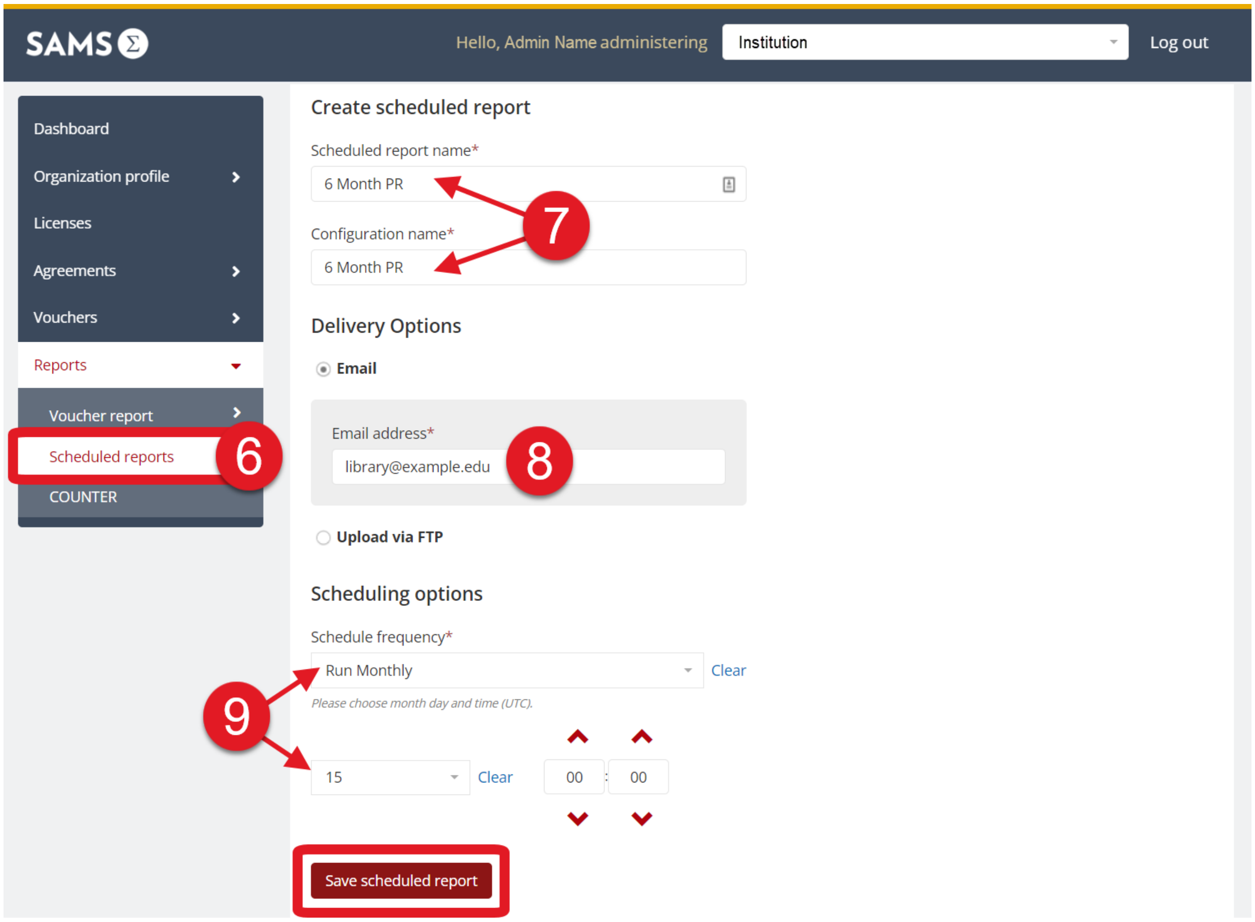


Setting Scheduled Reports

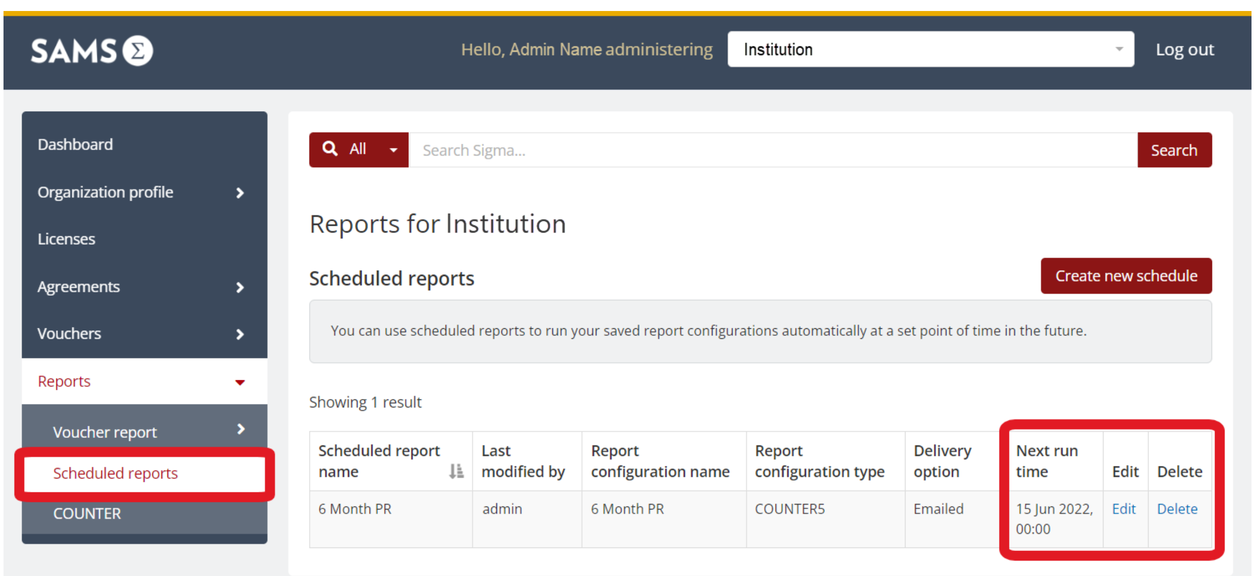
1. Reports can be scheduled to be sent to a specified email address covering a rolling time window.
2. To schedule a report, go to the “Reports” section from the left menu and select “COUNTER”.
3. Select the report type from the dropdown menu. Check the box for “Use Dynamic Date Range” and select the 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”.



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.

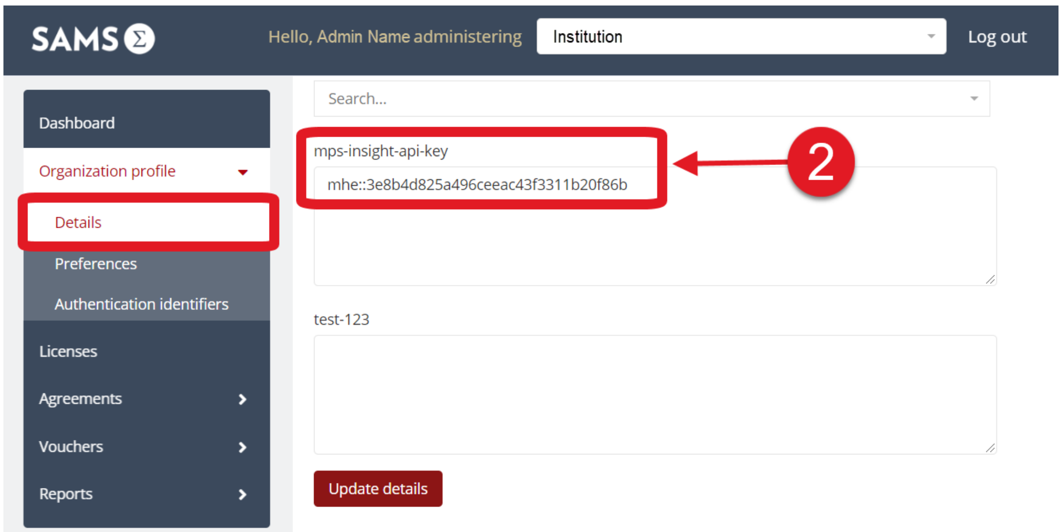


11. You can edit or delete existing scheduled reports and see when the next run time will occur from the main "Scheduled reports" page.

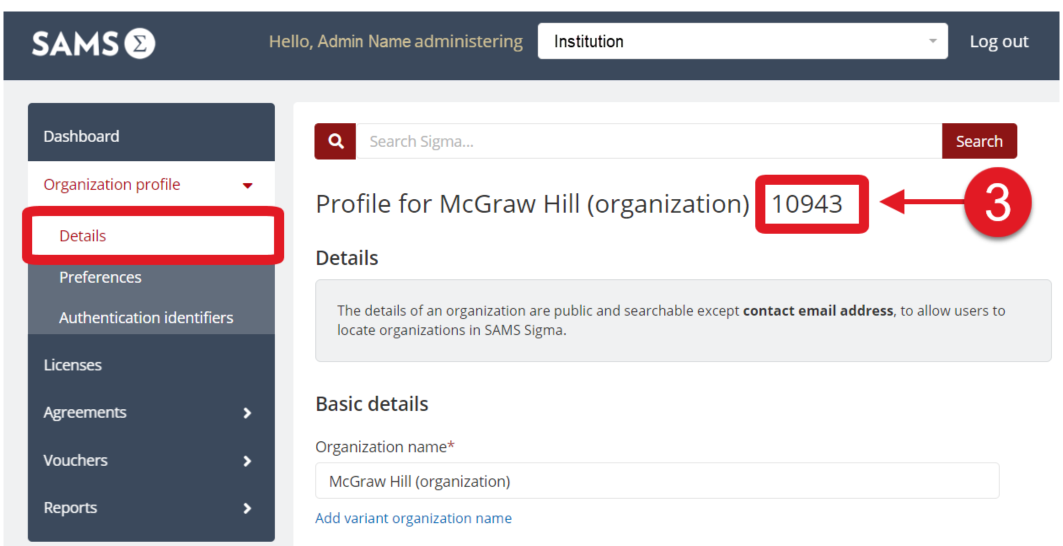


SUSHI Harvesting Information

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).



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.



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	• 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)	***Primary usage report*** • 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	• Shows no data for AccessEngineering since there are no Articles in the platform	• Pre-filtered version of the IR report, showing only total item requests for individual AccessScience articles
IR_M1	• Pre-filtered version of the IR report, showing only total item requests for videos	• Pre-filtered version of the IR report, showing only total item requests for individual videos and animations
PR	• 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)	• 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	• Pre-filtered version of the PR report, showing only searches, item requests, and unique title requests	• Pre-filtered version of the PR report, showing only searches and total item requests

	• “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	• 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	***Primary usage report*** • 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)	***Not useful for AccessScience*** • The entire platform appears in these reports as one “Title” (MH Access Science), with a row for each metric
TR_B1	• 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	***Not useful for AccessScience*** • The entire platform appears in these reports as one “Title” (MH Access Science), with a row for each metric
TR_B2	• 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	• 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	***Primary usage report*** • 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	***Not useful for AccessScience*** • 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	• 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	• 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	• "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)	***Primary usage report*** • Provides usage for individual content pages (identified by title and Proprietary Identifier) • Determine content type by the code in front of the Proprietary Identifier: ○ Articles= numerical code only for EST articles; YB for yearbook/archived articles

		○ 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 combines the two HTML counts
PR1	• 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	• 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