

Version 10.25.16

# Registering

In order to access the Institutional Administration screen, you will need to register as an administrator for the institution you represent. This will happen one of two ways:

- To set up administrator access for an account that is already active, go to the journal site and register using the **Register** link in the upper right corner of the screen. Once you complete the registration, you will receive an email with a link to confirm your email address and set your password. Once you have completed this verification step, send an email to the Pinnacle help desk at <u>pinnaclesupport@allenpress.com</u> to request administrator access to your institution's account. Be sure to include the email address you used to register on Pinnacle as well as Institutional account information such as ID#, Institution name, and the journal title(s) to which your institution subscribes.
- 2. If your institution has only recently subscribed to a journal hosted on Pinnacle and your email address was provided as the Institutional Administrator, then you should have received an email when your subscription was added to the system. The email message contains a link to the site where you can provide the information to activate the account and supply a password for your access to the administrator page.

Regardless of how you register, once you are recognized as an Institutional Administrator, it is important to register the IP range that includes all IP address for the institution you represent (see the IP Rage section below for more information).

## Logging In

Select the **Log In** link in the upper right corner of the journal site. The Institutional Administrator login will require two-factor authentication. The first factor is your email address and password, entered on the login screen. The second factor is recognized automatically if you are using an IP address that is registered to the institution. However, if you try to log in from a computer outside the registered IP range, you will be prompted to provide a cell phone number to receive a text message with a code which can be used to complete the two-factor authentication log in.

If you do not know your login credentials, you can use the **Forgotten your password?** Link on the login page to have the system reset your password and email it to you.

Once you have successfully logged in, your name or title will be shown at the top right of the page. Click on your name to access your user profile, which contains the Institutional Administrator Tab.

Institutional Administrator | Logout | Mobile | Cart

You will see several tabs of information available to registered users. The Institutional administration tab appears to the far right. This is only available to users with administrative access. End users and librarians without administrative privileges do not have access to this tab. If you should have access and do not, contact our Help Desk at pinnaclesupport@allenpress.com.



Select the tab for Institutional administration to see the menu options for working with the account.

## Institutional Administration Tab

There will be a box at the top of the page showing one of your accounts. If you administer more than one account, there will be a box you can click on to see a drop down list of your other accounts. You can then select the one that matches the site you are working in.

The Institutional Administration Tab allows you to manage institutional access and reporting via several pages:

### Subscription

- View your subscription information by Title, including the Coverage (volumes included) and ISSN for each title.
- Download your list of subscribed titles as a tab separated text file for easy integration into cataloguing systems.
- Use an Access Token to activate a new offer or subscription.

#### **IP Ranges**

- View, add, or delete your institution's list of IP Addresses and check for conflicts.
- Send an email of your institution's IP addresses for your records.
- **Note**: If you receive an error message about conflicting IP's and you don't have multiple accounts, please contact our Help Desk at <u>pinnaclesupport@allenpress.com</u> for assistance.

#### Administrators

- Add or remove Administrators to be assigned privileges to manage your institutional account.
- Send an email of your current list of Administrators for your records.

#### Banner

- Add/change the text that is displayed at the top left of the screen when users are viewing the journal site from your institution.
- **Note**: This feature is not available on all sites as some publishers have chosen not to allow institutional branding.

#### **Reference Linking**

- Enable or disable OpenURL linking, allowing or disallowing patrons' view of Open URL reference links on the website.
- **Note**: The link server URL should be entered as a complete URL, beginning with 'http://' and without a terminating '/' or '?'.
- Add a customized button to indicate OpenURL reference links (*button must be 85 pixels wide and 20 pixels high*).

#### **TPS Setup**

Enable your Trusted Proxy Server (TPS) to set up access between a password protected area of your
institutional site where patrons can click through to the website and be authenticated, regardless of
IP range.

### Usage Data

- Usage reporting on Pinnacle is COUNTER compliant.
- If your institution operates a SUSHI client, you can use it to retrieve reports from Pinnacle. This page contains:
  - The publisher's SUSHI request URL
  - Your RequestorID
  - Your CustomerReferenceID
- To email reports to yourself or to all administrators associated with your institution:
  - Select year choose the year or date range for which you wish to have reports.
  - Select reports you can select all reports, or choose only those you need.
  - Select formats the default format is HTML; however, you can also choose XML or tab-delimited formats.
  - Select the recipient(s) the reports will be sent to you only, unless you select the option to have them sent to all administrators for your organization.
  - Submit request once your preferred options are selected, submit your request by clicking the button at the bottom of the form. An error message in red will let you know if any selections have been omitted.
  - Your reports will be delivered via email attachment within minutes. The email will come from onlinepublishing@allenpress.com. The subject line will contain Report – Institution Name, Publisher, and Date Range.
- Note: For administrators with multiple accounts, you can order a single comprehensive report containing data for all your accounts by visiting <a href="http://pinnacle.allenpress.com/action/showInstitutionUsageReport">http://pinnacle.allenpress.com/action/showInstitutionUsageReport</a>. You will be able to login using the same administrator credentials. It does not matter which account is selected, as data for all your accounts will be included in a single report.

#### **Holdings File**

• Download the holdings file in a tab-separated, Open URL-compatible file

#### Help Desk

• You may email <u>pinnaclesupport@allenpress.com</u> directly, or use the link on the Help Desk page to contact our support staff for assistance.