

Guia do administrador

Um guia de referência rápida para usar a **área de administração institucional** da plataforma de pesquisa Emerald Insight



A Emerald publica uma coleção líder de pesquisa nos campos de administração e gestão e também em áreas aplicadas, incluindo educação, biblioteconomia, engenharia e saúde e assistência social. A plataforma de pesquisa Emerald Insight hospeda centenas de milhares de artigos de revistas, livros e estudos de caso de ensino.

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Faça login na sua conta institucional

- Faça login na sua conta usando o link 'Admin' (Admin) no canto superior direito da página inicial: **www.emeraldinsight.com**
- Insira o seu nome de usuário e senha na área de login
- Clique em 'Log in' (Login)

Quando estiver logado, você terá acesso à área 'Institutional Account' (Conta Institucional), de onde pode gerenciar sua conta institucional

Para ver suas assinaturas ativas e períodos de acesso

- Clique em 'Access entitlements' (Direitos de acesso)

The screenshot shows the Emerald Insight user interface. At the top, there is a navigation bar with the Emerald Insight logo and user information: 'Welcome: John Smithson', 'Log out', 'Help', 'Cart', 'Mobile Pairing', and 'Admin'. Below this, there are links for 'HOME', 'JOURNALS & BOOKS', and 'CASE STUDIES'. A search bar is present with a dropdown menu set to 'Articles and Chapters' and a search icon. The main content area is divided into two columns. The left column is titled 'My Account' and contains links for 'PERSONAL DETAILS', 'ACCESS ENTITLEMENTS', 'ACTIVATE ACCESS TOKEN', 'ALERTS', 'MARKED LIST', and 'SAVED SEARCHES'. The right column is titled 'Institutional Account' and shows the user's institution as 'EXAMPLE UNIVERSITY (1234765)'. Underneath, there are two sections: 'Access entitlements' with a 'Manage access entitlements' button (highlighted with a red box) and 'Usage reports' with a 'Manage usage data' button.

Suas assinaturas aparecerão no painel.

Para baixar uma lista de suas assinaturas

- Clique no link 'tab separated text file' (arquivo de texto separado por tabulação)

The screenshot shows the 'Access Entitlements' page in the Emerald Insight user interface. The page title is 'Access Entitlements' and the breadcrumb is 'Home / Institutional Account / Access entitlements'. Below the title, there is a heading 'The titles your institution has subscription access to are listed below' followed by 'Emerald Group Publishing Limited (615153)'. There is a search bar for 'Publication title' with a 'submit' button. A table lists the following publications:

Publication title	ISSN/ISBN	Coverage	Access period
Accounting, Auditing & Accountability Journal	0951-3574	1 Jan 1998 - 31 Dec 2006	1 Sep 2016 - 31 Dec 2016
Accounting Research Journal	1030-9616	1 Jan 2005 - 31 Dec 2006	1 Sep 2016 - 31 Dec 2016
American Journal of Business	1935-5181	1 Jan 1986 - 31 Dec 2006	1 Sep 2016 - 31 Dec 2016
Asian Review of Accounting	1521-7348	1 Jan 1992 - 31 Dec 2006	1 Sep 2016 - 31 Dec 2016
Baltic Journal of Management	1746-5265	1 Jan 2006 - 31 Dec 2006	1 Sep 2016 - 31 Dec 2016
Business Strategy Series	1751-5637	1 Jan 2000 - 31 Dec 2006	1 Sep 2016 - 31 Dec 2016

Below the table, there is a note: 'You can download this information as a tab separated text file via this link for integration into cataloguing systems.' The link 'tab separated text file' is highlighted with a red box.

Para ver seus administradores institucionais

- Clique em 'Administrators' (Administradores)

The screenshot shows the Emerald Insight Institutional Account dashboard. The page title is 'Home / Institutional Account'. The main content area displays several management options for the account, including 'Access entitlements', 'Usage reports', 'IP Ranges', 'Shibboleth', 'Trusted proxy', 'Link resolver', 'Co-branding', and 'Administrators'. The 'Administrators' link is highlighted with a red box, indicating the next step in the process.

Para adicionar um coadministrador:

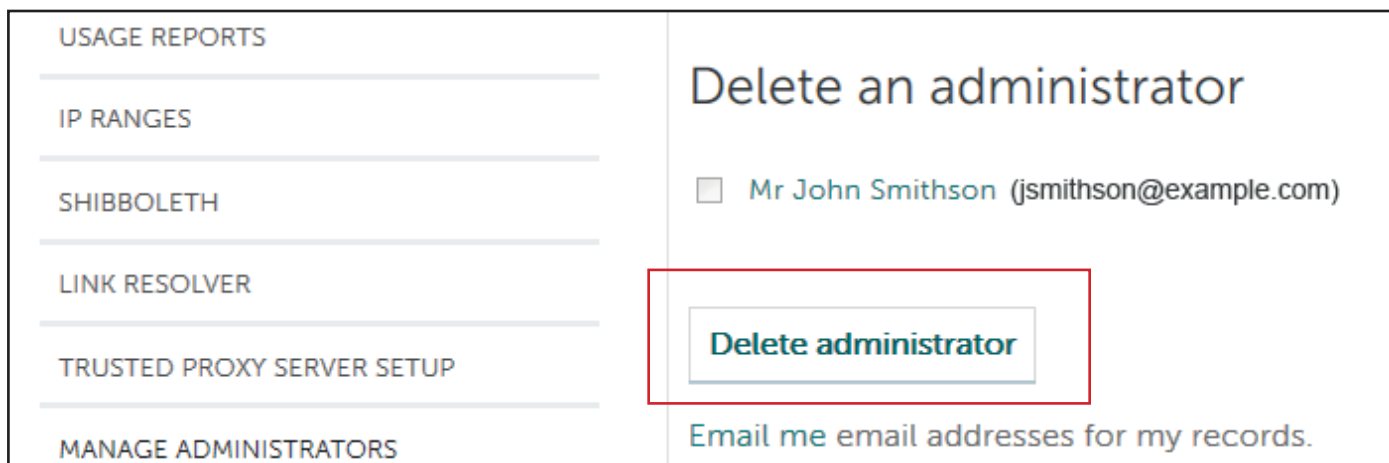
- Digite o e-mail da pessoa
- Clique em 'Add administrator' (Adicionar administrador)

The screenshot shows the Emerald Insight Institutional Account 'Manage Administrators' page. The page title is 'Home / Institutional Account / Manage Administrators'. The main content area displays the 'Add an administrator' form. The 'Email address' input field and the 'Add administrator' button are highlighted with a red box, indicating the next step in the process.

Uma notificação aparecerá e um e-mail incluindo o link de validação será enviado para este indivíduo

Para excluir um administrador:

- Marque a caixa perto do nome dele
- Clique em 'Delete administrator' (Eliminar administrador)



USAGE REPORTS

IP RANGES

SHIBBOLETH

LINK RESOLVER

TRUSTED PROXY SERVER SETUP

MANAGE ADMINISTRATORS

Delete an administrator

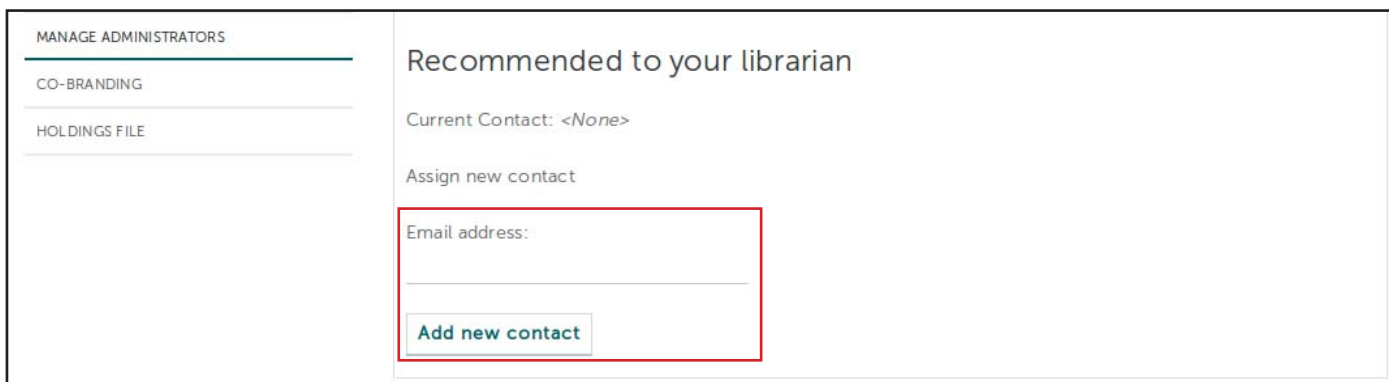
Mr John Smithson (jsmithson@example.com)

Delete administrator

[Email me email addresses for my records.](#)

Para adicionar um contato ao serviço da Emerald 'Recommended to your librarian' (Recomendar ao seu bibliotecário):

- Digite o e-mail da pessoa
- Selecione 'Add new contact' (Adicionar novo contato)



MANAGE ADMINISTRATORS

CO-BRANDING

HOLDINGS FILE

Recommended to your librarian

Current Contact: <None>

Assign new contact

Email address:

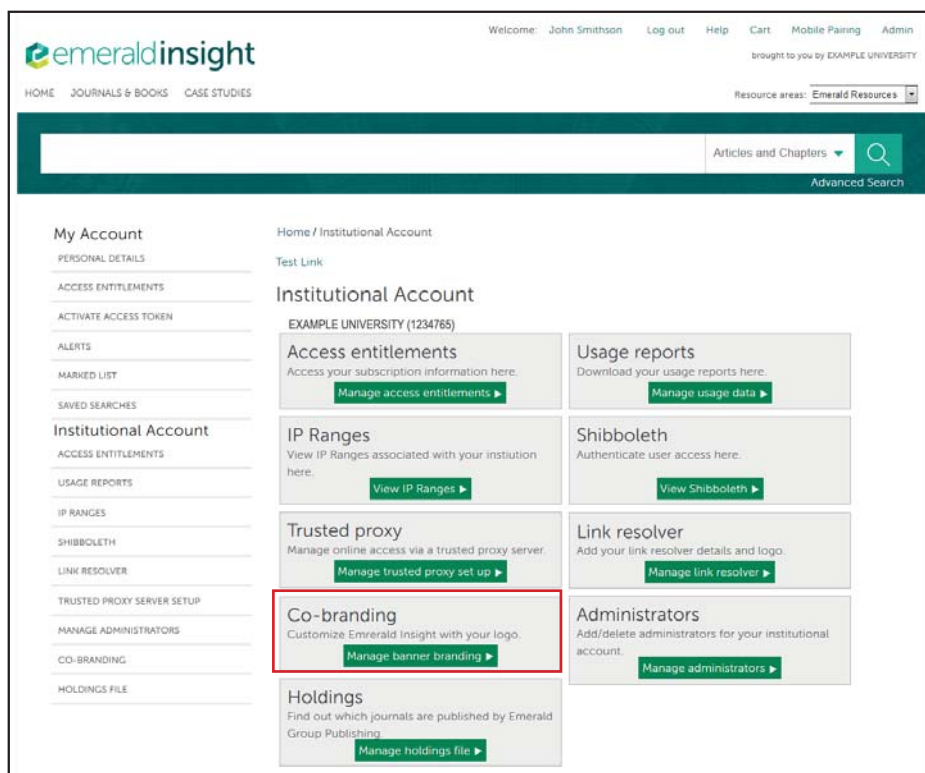
Add new contact

Um único contato pode ser mantido na opção 'Recommend to your librarian' (Recomende ao seu bibliotecário).

Verifique se você está logado na sua área de administração institucional (veja a seção 1)

Para adicionar seu texto e logotipo

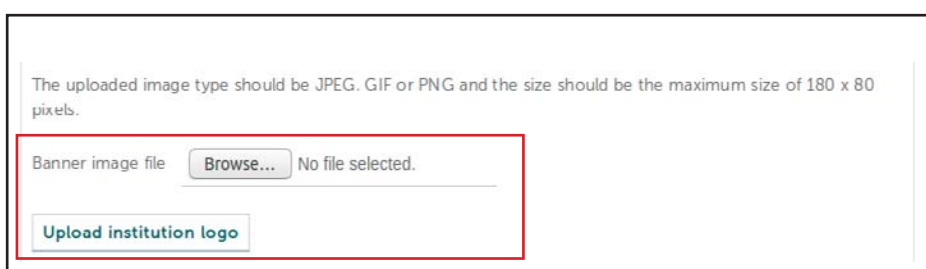
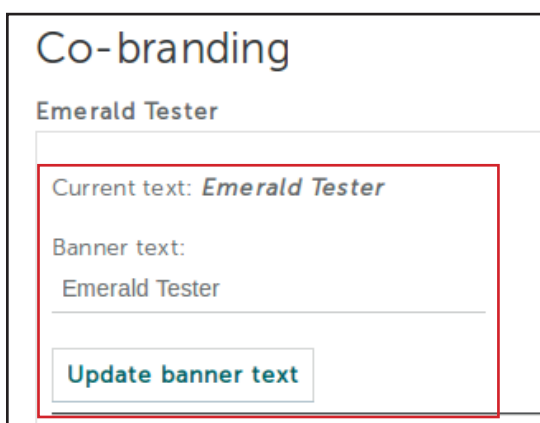
- Clique em 'Co-branding'



- Insira o texto que você gostaria de mostrar aos seus usuários autenticados depois de 'brought to you by' (Patrocinado por), (por exemplo, o nome de sua instituição) e clique no botão 'Update banner text' (Atualizar texto do banner).
- Clique em 'Browse' (Navegar) e selecione uma imagem a partir dos seus arquivos
- Clique no botão 'Upload institution logo' (Carregar o logotipo da instituição)
- Para remover ou substituir o logotipo da instituição, clique no botão 'Remove logo' (Remover logotipo)

A imagem carregada deve estar no formato JPEG, GIF ou PNG e o tamanho não deve ser maior que 180 x 80 pixels.

O logotipo e o texto do banner aparecerão no canto superior direito de cada página no site.



Acessando seus relatórios de uso:

- Clique em 'Usage reports' (Relatórios de uso)

Verifique se você está logado na sua área de administração institucional (veja a seção 1)

The screenshot shows the Emerald Insight Institutional Account dashboard. The user is logged in as John Smithson. The dashboard includes a navigation menu with 'HOME', 'JOURNALS & BOOKS', and 'CASE STUDIES'. A search bar is present with 'Articles and Chapters' and an 'Advanced Search' button. The main content area is divided into several sections: 'My Account' (with links for Personal Details, Access Entitlements, Activate Access Token, Alerts, Marked List, Saved Searches), 'Institutional Account' (with links for Access Entitlements, Usage Reports, IP Ranges, Shibboleth, Link Resolver, Trusted Proxy Server Setup, Manage Administrators, Co-branding, and Holdings File), and 'Usage reports' (highlighted with a red box, with a 'Manage usage data' link). Other sections include 'Access entitlements', 'IP Ranges', 'Shibboleth', 'Trusted proxy', 'Link resolver', 'Co-branding', 'Administrators', and 'Holdings'.

Relatórios de uso podem ser baixados nos formatos CSV, XML, HTML ou texto delimitado por tabulação, e podem ser enviados por e-mail para um administrador selecionado ou todos os administradores.

Se você for administrador de mais de uma instituição, terá a opção de selecionar a instituição para a qual deseja ver o uso.

The screenshot shows the Emerald Insight Institutional Account 'Usage Reports' configuration page. The user is logged in as John Smithson. The dashboard includes a navigation menu with 'HOME', 'JOURNALS & BOOKS', and 'CASE STUDIES'. A search bar is present with 'Articles and Chapters' and an 'Advanced Search' button. The main content area is divided into several sections: 'My Account' (with links for Personal Details, Access Entitlements, Activate Access Token, Alerts, Marked List, Saved Searches), 'Institutional Account' (with links for Access Entitlements, Usage Reports, IP Ranges, Shibboleth, Link Resolver, Trusted Proxy Server Setup, Manage Administrators, Co-branding, and Holdings File), and 'Usage reports' (highlighted with a red box, with a 'Manage usage data' link). Other sections include 'Access entitlements', 'IP Ranges', 'Shibboleth', 'Trusted proxy', 'Link resolver', 'Co-branding', 'Administrators', and 'Holdings'.

The 'Usage Reports' configuration page includes the following sections:

- SAVED SEARCHES**
- Institutional Account** (with links for ACCESS ENTITLEMENTS, USAGE REPORTS, IP RANGES, SHIBBOLETH, LINK RESOLVER, TRUSTED PROXY SERVER SETUP, MANAGE ADMINISTRATORS, CO-BRANDING, and HOLDINGS FILE)
- E-mail notifications**
 - E-mail when COUNTER usage data for the current month has been processed and is ready for reporting
 - [Update settings](#)
- Delivery via E-mail**
 - Date range**
 - By year: 2016
 - Select Range: From January 2016 to January 2016
 - Report type**
 - Select all reports
 - Journal Report 1 (Number of Successful Full-Text Article Requests by Month and Journal)
 - Journal Report 1 GOA (Number of Successful Gold Open Access Full-Text Article Requests by Month and Journal)
 - Journal Report 1a (Number of Successful Full-Text Article Requests from an Archive by Month and Journal)
 - Journal Report 2 (Access Denied to Full-Text Articles by Month, Journal and Category)
 - Journal Report 3 (Number of Successful Item Requests by Month, Journal and Page Type)
 - Journal Report 3 Mobile (Number of Successful Item Requests by Month, Journal and Page Type for usage on a Mobile Device)
 - Journal Report 5 (Number of Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal)
 - Platform Report 1 (Total Searches, Result Clicks and Record Views by Month and Platform)
 - Book Report 2 (Number of Successful Section Requests by Month and Title)
 - Book Report 3 (Access Denied to Content Items by Month, Title and Category)
 - Title Report 1 (Number of Successful Requests for Journal Full-Text Articles and Book Sections by Month and Title)
 - Title Report 1 Mobile (Number of Successful Requests for Journal Full-Text Articles and Book Sections by Month and Title (formatted for normal browsers/delivered to mobile devices AND formatted for mobile devices/delivered to mobile devices))
 - Title Report 2 (Access Denied to Full-Text Items by Month, Title and Category)
 - Title Report 3 (Number of Successful Item Requests by Month, Title and Page Type)
 - Title Report 3 Mobile (Number of Successful Item Requests by Month, Title and Page Type (formatted for normal browsers/delivered to mobile devices AND formatted for mobile devices/delivered to mobile devices))
 - Format type**
 - XML
 - HTML
 - Tab-delimited text
 - Recipients**
 - cedmonds@mc.co.uk
 - All administrators of this organisation
- [Submit reports request](#)

Baixando os relatórios de uso da plataforma Emerald Insight:

- Escolha um ano na lista suspensa OU selecione a opção de intervalo de datas
- Escolha o tipo de relatório
- Escolha um formato para o relatório
- Insira o seu endereço de e-mail ou marque a opção Todos os administradores
- Clique em 'Submit reports request' (Enviar solicitação de relatórios)

Baixando os relatórios de uso do arquivo de anos anteriores da plataforma Emerald Insight:

- Para baixar os relatórios de uso do início de 2014 e de anos anteriores a ele, clique em 'Download COUNTER legacy report' (Baixar relatório de legado COUNTER)

SAVED SEARCHES

Institutional Account

ACCESS ENTITLEMENTS

USAGE REPORTS

IP RANGES

SHIBBOLETH

LINK RESOLVER

TRUSTED PROXY SERVER SETUP

MANAGE ADMINISTRATORS

CO-BRANDING

HOLDINGS FILE

E-mail notifications

E-mail when COUNTER usage data for the current month has been processed and is ready for reporting.

[Update settings](#)

Delivery via E-mail

1. Date range

By year

2016

Select Range:

From: January 2016

To: January 2016

2. Report type

Select all reports

Journal Report 1 (Number of Successful Full-Text Article Requests by Month and Journal)

Journal Report 1 GOA (Number of Successful Gold Open Access Full-Text Article Requests by Month and Journal)

Journal Report 1a (Number of Successful Full-Text Article Requests from an Archive by Month and Journal)

Journal Report 2 (Access Denied to Full-Text Articles by Month, Journal and Category)

Journal Report 3 (Number of Successful Item Requests by Month, Journal and Page Type)

Journal Report 3 Mobile (Number of Successful Item Requests by Month, Journal and Page Type for usage on a Mobile Device)

Journal Report 5 (Number of Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal)

Platform Report 1 (Total Searches, Result Clicks and Record Views by Month and Platform)

Book Report 2 (Number of Successful Section Requests by Month and Title)

Book Report 3 (Access Denied to Content Items by Month, Title and Category)

Title Report 1 (Number of Successful Requests for Journal Full-Text Articles and Book Sections by Month and Title)

Title Report 1 Mobile (Number of Successful Requests for Journal Full-Text Articles and Book Sections by Month and Title (formatted for normal browsers/delivered to mobile devices AND formatted for mobile devices/delivered to mobile devices))

Title Report 2 (Access Denied to Full-Text Items by Month, Title and Category)

Title Report 3 (Number of Successful Item Requests by Month, Title and Page Type)

Title Report 3 Mobile (Number of Successful Item Requests by Month, Title and Page Type (formatted for normal browsers/delivered to mobile devices AND formatted for mobile devices/delivered to mobile devices))

3. Format type

XML

HTML

Tab-delimited text

4. Recipients

cedmonds@mcb.co.uk

All administrators of this organisation

[Submit reports request](#)

Baixando outros tipos de relatório de uso:

Relatórios SUSHI:

- Os detalhes necessários para configuração SUSHI para administradores podem ser encontrados na área de relatórios de uso

Notificações COUNTER:

- Para desativar o e-mail COUNTER: desmarque a caixa de notificação e selecione 'update settings' (Atualizar configurações)
- Para reinstalar o e-mail COUNTER: marque a caixa de notificação e selecione 'update settings' (Atualizar configurações)

Usage Reports

Emerald Tester

Our SUSHI request URL is: <http://atypon-test.emeraldinsight.com/api/soap/analytics/SushiService>

Your Requestor ID is: cedmonds@mcb.co.uk

Your CustomerReference ID is: 1a2eb8bd-b605-458e-9191-ca192e48ed26

E-mail notifications

E-mail when COUNTER usage data for the current month has been processed and is ready for reporting.

[Update settings](#)

Notificações do e-mail counter são enviadas aos administradores padrão quando os dados de uso para o mês atual tiverem sido processados e estiverem prontos para os relatórios.

Adicionando um resolvidor de link

- Clique no 'Link resolver'

Verifique se você está logado na sua área de administração institucional (veja a seção 1)

The screenshot shows the Emerald Insight administrative dashboard. The user is logged in as John Smithson. The dashboard includes a navigation menu, a search bar, and several management sections. The 'Institutional Account' section is expanded, showing options like 'Access entitlements', 'Usage reports', 'IP Ranges', 'Shibboleth', 'Trusted proxy', 'Link resolver', 'Co-branding', 'Administrators', and 'Holdings'. The 'Link resolver' option is highlighted with a red box, indicating it is the next step in the process.

- Digite a 'base URL' (URL base) para sua biblioteca

The screenshot shows the 'Link Resolver' configuration page. The page title is 'Link Resolver' and the sub-header is 'Emerald Tester'. The form contains the following elements:

- Base URL:** A text input field.
- Current OpenURL Button:** A button labeled 'Open URL'.
- Upload OpenURL button:** A 'Browse...' button next to the text 'No file selected.'.
- Update:** A button at the bottom left of the form.

- Carregue uma nova imagem de logotipo/botão para a sua biblioteca
- Depois pressione o botão 'Update' (Atualizar)

A altura do botão OpenURL (AbrirURL) deve ser entre 20 e 25 pixels. Se mais tarde você desejar desativar os botões do resolvidor de link, uma opção para fazer isso estará disponível nesta página sempre que uma URL base estiver ativa.

Configuração de Shibboleth

- Clique em Shibboleth

Verifique se você está logado na sua área de administração institucional (veja a seção 1)

The screenshot shows the Emerald Insight administrative interface. At the top, there is a navigation bar with the Emerald Insight logo, user information (Welcome: John Smithson), and links for Log out, Help, Cart, Mobile Pairing, and Admin. Below the navigation bar, there is a search bar and a dropdown menu for Resource areas (set to Emerald Resources). The main content area is titled 'Home / Institutional Account' and 'Test Link'. It features a sidebar on the left with a 'My Account' section and an 'Institutional Account' section. The 'Institutional Account' section is expanded, showing various settings: Access entitlements, Usage reports, IP Ranges, Shibboleth (highlighted with a red box), Trusted proxy, Link resolver, Co-branding, Administrators, and Holdings. Each setting has a corresponding 'Manage' or 'View' button.

- Digite o número de identificação da federação (o ID da organização não é requerido) e clique em 'Update' (Atualizar)

The screenshot shows the 'Shibboleth' configuration form in the Emerald Tester interface. The form is titled 'Shibboleth' and 'Emerald Tester'. It contains two input fields: 'Shibboleth Entity ID' and 'Organization/Unit ID (optional)'. Below the input fields, there is an 'Add' button and an 'Update' button.

Veja os seus endereços de IP:

- Clique em 'IP Ranges' (Faixas de IP)

Verifique se você está logado na sua área de administração institucional (veja a seção 1)

The screenshot shows the Emerald Insight Institutional Account dashboard. The user is logged in as John Smithson. The dashboard includes a navigation menu with 'HOME', 'JOURNALS & BOOKS', and 'CASE STUDIES'. A search bar is at the top right. The main content area is divided into several sections: 'My Account' (Personal Details, Access Entitlements, Activate Access Token, Alerts, Marked List, Saved Searches), 'Institutional Account' (Access Entitlements, Usage Reports, IP Ranges, Shibboleth, Link Resolver, Trusted Proxy Server Setup, Manage Administrators, Co-branding, Holdings File), 'Access entitlements', 'Usage reports', 'Shibboleth', 'Link resolver', 'Trusted proxy', 'Co-branding', and 'Holdings'. The 'IP Ranges' link is highlighted with a red box.

- Uma lista de faixas de IP da sua organização será exibida

The screenshot shows the 'IP Ranges' page in the Emerald Tester account. The page title is 'IP Ranges' and the user is identified as 'Emerald Tester'. Below the title, it states: '(For your information, the IP address of your current internet connection is: 88.98.23.210)'. There is a table with two columns: 'Description' and 'IP range'. Below the table, there is a note: 'Please remember: Only the sites covered by the agreement are authorized to access this online subscription.' and a link: 'Email me my IP addresses for my records.'

Instruções de IP adicionais:

- Para receber uma cópia dos IPs registrados em um e-mail, selecione 'Email me my IP addresses for my records' (Envie-me por e-mail os endereços de IP para meus registros)
- Para atualizar os IPs da sua organização, entre em contato pelo e-mail support@emeraldinsight.com

- **Configuração TPS:**
- Clique em 'Trusted proxy'

Verifique se você está logado na sua área de administração institucional (veja a seção 1)

The screenshot shows the Emerald Insight user interface. The top navigation bar includes the logo, user name (John Smithson), and various utility links. The main content area is divided into a left sidebar with navigation options like 'My Account', 'Institutional Account', and 'Trusted Proxy Server Setup'. The main panel displays the 'Institutional Account' settings for 'EXAMPLE UNIVERSITY (1234765)'. A red box highlights the 'Trusted proxy' section, which includes a description and a 'Manage trusted proxy set up' button.

- Adicione o endereço de IP (ou faixa de IPs) do servidor da sua instituição
- Adicione o domínio do website (Isto é opcional)
- Adicione o texto do banner (normalmente isso é uma mensagem de boas-vindas com o nome da sua instituição)
- Adicione a URL da publicação para conceder acesso
- Adicione a URL de uma página de erro se os usuários não conseguirem fazer a autenticação
- Selecione a linguagem de programação com a qual você gostaria de gerar o código TPS

The screenshot shows the 'Trusted Proxy' configuration page. The left sidebar is identical to the previous screenshot. The main panel is titled 'Institutional Account / Trusted Proxy' and contains a form for configuring the proxy server. The form includes a dropdown for 'Emerald Tester' (set to 'New Server'), a 'Description' field, and several text input fields for 'through to', 'Optional domain', 'Banner text', 'URL of the journal to grant access', and 'URL of an error page if users fail to authenticate'. A 'Language of TPS code' dropdown is set to 'Java/JSP'. A 'Set up my Trusted Proxy Server and generate code' button is located at the bottom right.

- Clique no botão 'Set up my Trusted Proxy Server and generate code' (Configurar meu servidor proxy e gerar código) – então um código será gerado na linguagem da sua escolha

Home / Institutional Account / Trusted Proxy

My Account

- PERSONAL DETAILS
- ACCESS ENTITLEMENTS
- ACTIVATE ACCESS TOKEN
- ALERTS
- MARKED LIST
- SAVE D SEARCHES

Institutional Account

- ACCESS ENTITLEMENTS
- USAGE REPORTS
- IP RANGES
- SHIBBOLETH
- LINK RESOLVER
- TRUSTED PROXY SERVER SETUP**
- MANAGE ADMINISTRATORS
- CO-BRANDING
- HOLDINGS FILE

Institutional Account

Emerald Tester

You are managing

Description

IP address (or IP range) of your institution's server.
IP address from where the user will access the publisher site through TPS.

through to
Leave blank if there is only one IP address.

Optional domain
If IP address is shared with multiple web-sites, then an extra parameter 'domain' is needed to distinguish this site.

Banner text
Normally this is a welcome message with the name of your institution

URL of the journal to grant access
URL of the List of Issues page of the journal

URL of an error page if users fail to authenticate.
URL is normally hosted on your web-site.

Language of TPS code.

Set up my Trusted Proxy Server and generate code

- Para ver seus 'KBART holdings':
- Clique em 'Holdings' (Holdings)

Verifique se você está logado na sua área de administração institucional (veja a seção 1)

The screenshot shows the Emerald Insight institutional account interface. The 'Holdings' section is highlighted with a red box. The dashboard includes a navigation menu, a search bar, and various account management options like 'Access entitlements', 'Usage reports', 'IP Ranges', 'Shibboleth', 'Trusted proxy', 'Link resolver', 'Co-branding', and 'Administrators'.

- Selecione o arquivo Holdings para sua organização: isso fará com que o arquivo baixe em um formato separado por tabulação

The screenshot shows the 'Holdings file' download page. It features a link for 'Our KBART Holdings file' and a description: 'This file lists the publications available on our site in a tab-separated format.'

11

Baixando os registros MARC

Os registros MARC estão disponíveis para que a instituição faça o download no site Emerald Publishing.

- Acesse: www.emeraldpublishing.com/marc

12

Baixando os registros OCLC e números de controle LCC

Os registros MARC e os números de controle LCC estão disponíveis para que a instituição faça o download no site Emerald Publishing.

- Acesse: www.emeraldpublishing.com/marc

Guias Emerald Insight

Para visualizar todos os guias da plataforma emeraldinsight.com, visite:
emeraldpublishing.com/guides

Suporte Emerald Insight

Se você precisar de mais informações, entre em contato com nossa equipe pelo e-mail support@emeraldinsight.com

