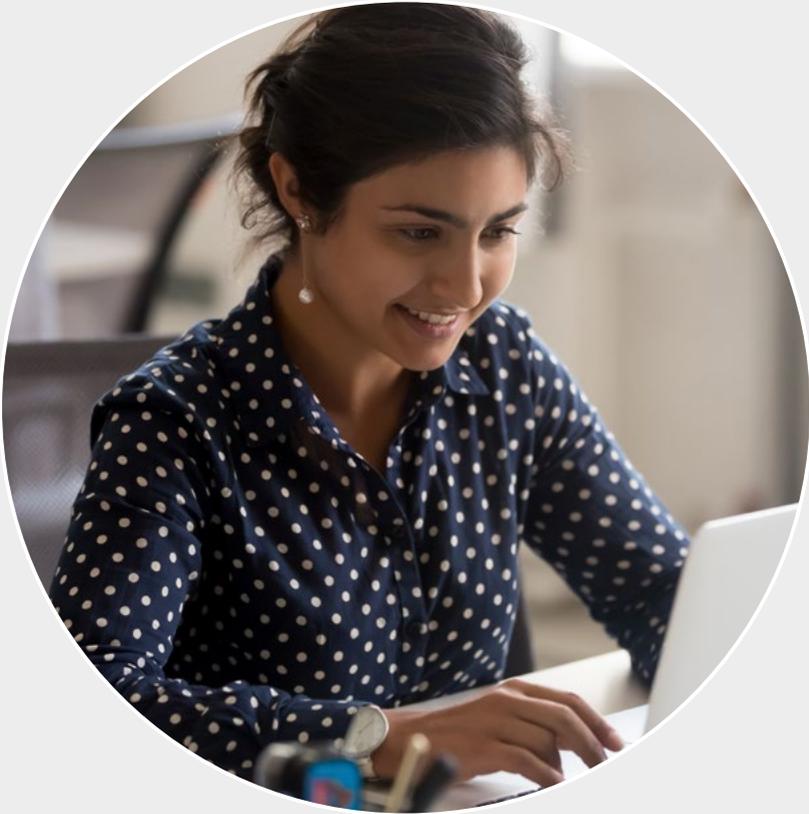




# SIX SIMPLE STEPS

## TO SET UP YOUR EMERALD RESOURCES



Discover journals, books, case studies  
and Expert Briefings on [emerald.com/insight](https://www.emerald.com/insight)

## Step 1

### Using the Account Management Portal

The Account Management Portal allows an administrator at an institution to manage all resources in one place, using their own user profile login.

Once logged in to your user profile you will be given the option to proceed as a user or as an administrator to the portal.

Within the portal you can view your institution's current holdings, access COUNTER usage data, check authentication details and manage your account details.

More information is available by viewing our [Library Administrator resources](#)

#### If you are already registered as the administrator for your institution:

Using your user profile details, login at [www.emerald.com/login](http://www.emerald.com/login) and select the Account Management Portal link.

#### If you need to register as the administrator for your institution:

- First you need to register a user profile at [www.emerald.com/register](http://www.emerald.com/register)
- Then contact Customer Support ([support@emerald.com](mailto:support@emerald.com)) so that we can link your user profile to the institutional account. Once this has been confirmed, you will be able to login as above.

#### What you need to do:

If any of the information below is incorrect, please email [support@emerald.com](mailto:support@emerald.com)

- Is the named contact correct? Do you want to add more than one named contact?
- If you are the administrator for multiple organisations, check that each is listed.
- Have we captured the correct method(s) of authentication?
- Can you access your usage data?

## Step 2

### Authentication

Emerald Insight supports a range of on-and-off campus authentication methods. If you experience problems authenticating your account, take a look at guidance on [trouble-shooting](#) the problem.

#### What you need to do:

A quick way of confirming that you are authenticated is by checking that your institutional name is on the top left of the [emerald.com/insight](http://emerald.com/insight) page.

## Step 3

### Ensuring content is discoverable

Find out which [discovery tools and knowledge bases](#) Emerald content is discoverable through. We provide various [resources](#) to support cataloguing and discovery, including MARC records, KBART and persistent URLs.

#### What you need to do:

Using the information above, check that you have activated the correct product(s) in your chosen discovery tool.



## Step 4

### You are ready to go! Promote your resources to library users

Users can now start searching and browsing your new resources on [emerald.com/insight](http://emerald.com/insight). Content can also be discovered through the browse pages for [journals](#), [books](#), [cases](#) and [Expert Briefings](#).

[Promote your Emerald resources](#) to library users using posters, web banners, social media images and pre-written communications. Choose from a number of sizes or contact your Emerald representative to request translated versions.

#### What you need to do:

Share our local language [user guides and videos](#) - designed to help users navigate the platform easily and find the content they need quickly.



## Case Studies teaching notes

Access through your user profile

Teaching notes are available to teaching staff based at institutions who subscribe to any of Emerald's case studies products:

- The CASE Journal
- eCases Collection
- Emerging Markets Case Studies

#### What you need to do?

To access teaching notes, users must have a registered profile.

Teaching staff must contact [support@emerald.com](mailto:support@emerald.com) to verify their affiliation with the institution so that we can assign access rights to their user profile.

Share the detailed [guidelines](#) with teaching staff.



## Step 5

### Create a Profile and sign up for Table of Contents alerts

The profile area on Emerald Insight gives users personalisation features, such as 'save search' and 'Table of Contents' alerts.

Set up a new personal profile:  
[emerald.com/register](http://emerald.com/register)

Login to your profile area:  
[emerald.com/login](http://emerald.com/login)

#### What you need to do:

Encourage your users to register their own user profile to personalise their experience on Emerald Insight. Share the [profile guide](#) with your users to guide them through this.



## Step 6

### Track your usage

COUNTER usage data is accessed through the Account Management Portal. View [Library administrator resources](#)

Find out more about [usage data and reports](#)

#### What you need to do:

New usage data is available at the start of every month, so please check the portal for new data.

If you have any questions about accessing your COUNTER reports, please contact [Customer Support](#).



Customer Support are here to help  
[support@emerald.com](mailto:support@emerald.com)

Library administrator resources  
[emeraldgroupublishing.com/admin-resources](http://emeraldgroupublishing.com/admin-resources)