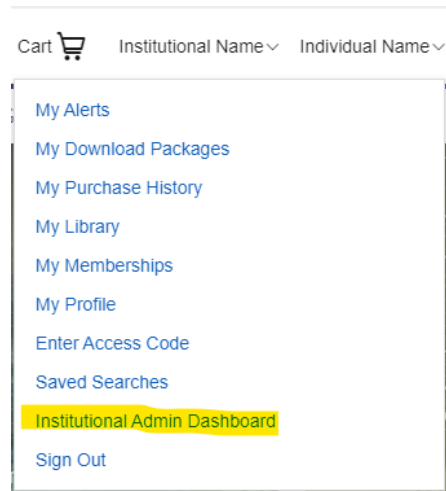


Quick Tips to help you in your role as an Institutional Account Administrator for OnePetro

As an Institutional Account Administrator, you are entrusted with the responsibility of managing your company or university's OnePetro account and subscription. You will also receive automated reminders for subscription renewals. Your tools are the **Institutional Administrator's Dashboard** and the secure online **Invoicing and Payment Portal**.

Institutional Administrator's Dashboard

There are two ways to access the Institutional Administrator's Dashboard. You may sign into OnePetro with your usual method of access, click on the arrow next to your name, and scroll down to Institutional Admin Dashboard:



*Important update:
as of 15-Oct-2024,
**YOUR USERNAME
IS NOW YOUR
EMAIL ADDRESS.**

Or you may visit the dashboard directly at <https://sitemaster.onepetro.org/admin/login.aspx>



Sign into the dashboard with your OnePetro login credentials (the username is your email address). If you are unsure of your password, please visit <https://onepetro.org/my-account/reset-password> to reset it.

1. Once logged into the Institutional Administrator's Dashboard, you will see the name of your company/university institution at the top of the screen, and your name on the upper right-hand side of the screen.
2. Choose from the following tabs:
 - a. **Institutional Summary:** This is a snapshot of the subscription, with the Account Name, 7-digit Customer/Vendor ID#, Access Options, and Current Subscriptions.
 - i. Your 7-digit Customer/Vendor ID# is needed when you utilize the Payment/Orders Portal.
 - ii. Current Subscription indicates the type of subscription (Unlimited or Limited) and the subscription's start and end dates.
 - b. **Access Options:** This is where you can update IP addresses for account access. Follow these steps:
 - i. Scroll to the IP Addresses section.
 - ii. Delete, edit, or add IP addresses as needed. Please note: IP addresses must be static/not dynamic and must be the company's PUBLIC IP addresses. (The following PRIVATE IP addresses/ranges will be removed if added: 10.0.0.0 – 10.255.255.255, 172.16.0.0 – 172.31.255.255, 192.168.0.0 – 192.168.255.255.)
 - c. **Access Downloads:** This tab is only active for *Corporate Limited Subscriptions*. It provides real-time information on how many downloads have been utilized out of that subscription's yearly maximum number. You will also find the latest content obtained by the institution's users with the purchase and expiration date of each download. (These indicate the 7-day period during which a user's colleagues can obtain the same item without it counting as another download.)
 - d. **KBART:** This is where you find the most up to date listings of all journals, conference proceedings, and eBooks available on OnePetro.
 - e. **COUNTER Reports:** This is where you will generate detailed COUNTER reports for Unlimited or Limited Subscriptions by following these steps:
 - i. Select a date range
 - ii. Choose specific reports to generate. [The most used reports are **PR – Platform Master Report** (details the number of searches) and **TR -Title Master Report** (details the specific papers reviewed and/or downloaded and viewed on-screen).]
 - f. **Affiliated Users:** This is where you can see all users who are or have been affiliated with your subscription. In your role as Institutional Account Administrator, you may edit affiliated users. Notes: You may download a bulk file of users, but if you are adding new users, they must have already created a OnePetro account, and you are only able to add one user at a time without logging out/back in. Also, affiliation is stored for 90-day intervals, after which, users must sign in again through your account's typical method of access to remain active.

Invoicing and Payment Portal <https://www.spe.org/member/Onlinepayment/index/XXXXXXX>

1. Visit the portal, and then insert your institutional account's 7-digit Customer/Vendor ID# in place of the XXXXXXX.
2. Sign in with your Institutional Administrator's username (your email address) and usual password. If you need to reset your password, please first visit <https://onepetro.org/my-account/reset-password>.
3. Within 6 months of your subscription's renewal date, you have the options to:
 - a. Edit Contact Information.
 - b. Access a link to the Institutional Administrator's dashboard (as detailed above).
 - c. Verify and/or change the next subscription's start date.
 - d. View subscription options for the account's renewal (note, if it is a Corporate Limited Subscription, you will see packages with the maximum number of annual downloads and the associated pricing in USD).
 - e. Print an invoice.
 - f. Complete payment online via credit card.
 - g. If needed, you can add a recipient(s) for an emailed copy of any receipts.

If you need further assistance, don't hesitate to contact us at lib_subscribe@spe.org or OnePetroTeam@OnePetro.org. Please be sure to provide the name of your institution and the customer/vendor ID #.

If you need to change or add additional Institutional Account Administrators, please send us the contact(s) name(s) and email address(es) and we will be happy to assist. If the contact(s) already have email addresses on file with OnePetro, please include that information.

Additionally, let us know if you would like a pdf of usage instructions to share with your colleagues.

Thank you for your commitment as an Institutional Account Administrator! We appreciate you helping your company/university effectively use OnePetro.