

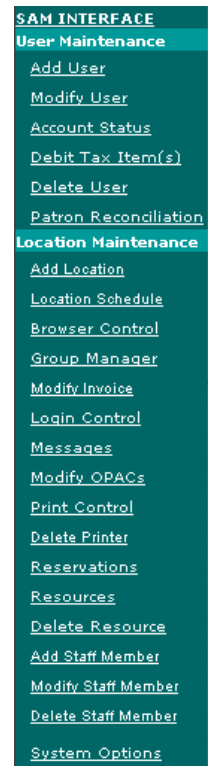
Administering SAM

You will need your SAM UserName and Password to enter the site. Once in the site you will be able to manage your patron accounts as well as make changes to your library's SAM environment. The administration of SAM is done from a Website. That means it can be accessed from any computer anywhere. Staff at MHLS can assist you in making changes remotely. The SAM Administration software presently only works on Windows Internet explorer.



Accessing the Administrative interface

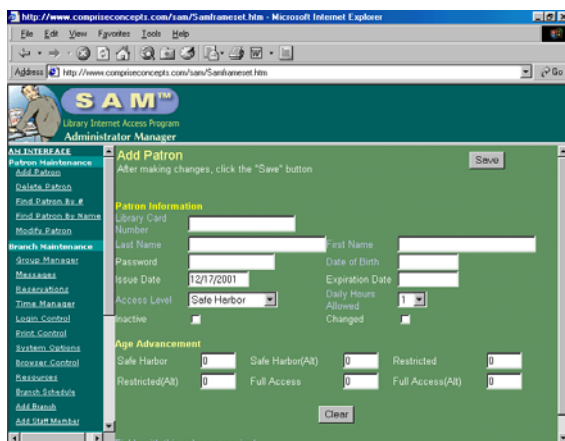
1. Open up a **Windows Internet explorer** browser session.
2. Point the browser to <http://sam.midhudson.org/sam/index.html>
3. Enter your UserName and Password



Choose from the menu of options in the left vertical menu. Below you will find a description of the functions relevant to the MHLS SAM installation. The functions omitted are either not used by our libraries or have not been purchased. The functions are described in the order that they appear on the menu

Administrative Functions-User Maintenance

Add User –Rarely used



Description:
Enter the information for the new patron. This step includes entering First, and Last Name, Card Number, Password, Access Level, and Date of Birth. The required fields in the first step are **Last Name**, **First Name**, **Date of Birth** and **Library Card Number**. Once all information is entered, click on the “Save” button.

Important: Password is user created, so it does not have to be entered here.

YOU DO NOT HAVE TO “ADD A USER”. A SAM account is pulled Down from Millennium through “importing a user” or logging into the patron interface.

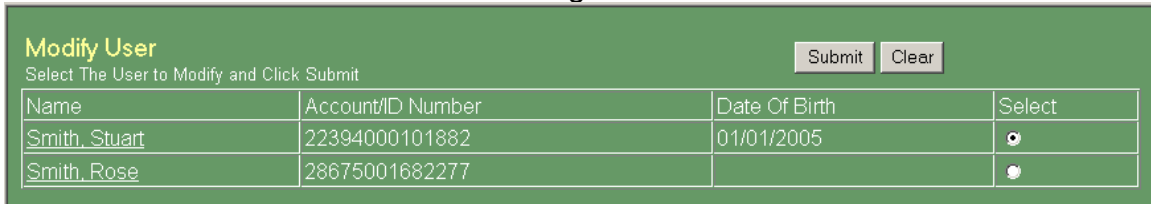
Modify User –Used to edit existing records

Retrieving a SAM Patron Record

1. Click “modify User”. A new search window will open.
2. Select a Search method
3. Fill in the data.
4. Click Search.



5. If there is a match it will be displayed. If there are multiple matches, select the correct record by double clicking on the patron’s name or marking the select radio button and clicking submit.



The SAM Patron Record

Modify User
After making changes, click Save.

Fields in this color are required

Account/ID Number: 22394000101000

Last Name: Smith (Cannot contain an apostrophe) | First Name: Sue (Cannot contain an apostrophe) | Middle Name: (Cannot contain an apostrophe)

Date Of Birth: 01/01/2005 (MM/DD/YYYY) | Pin / Password: dogz | Change Pin / Password Next Time:

User Status: Active | Internet Access: Restricted | Group: Standard User

Issue Date: (MM/DD/YYYY) | Expiration Date: 03-25-2007 (MM/DD/YYYY) | Guardian's Name: (Cannot contain an apostrophe)

Time Used Today: 00:00:00 | Update Patron's Time: N/A

User is logged on | Reset User's Logs

Address: 77 Vest Road\$Poughke... | County Dept: Library

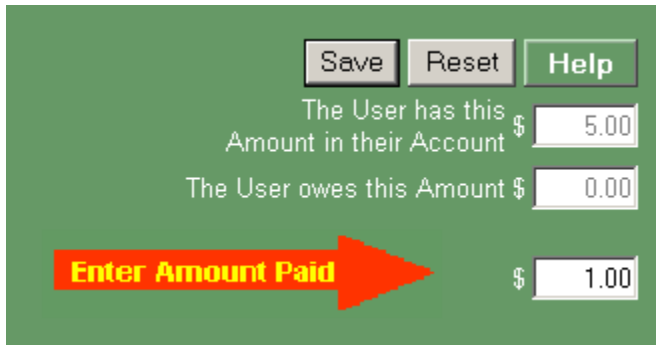
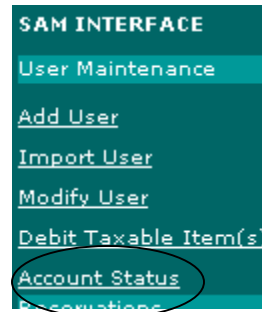
City: | State: | Zip Code: | Home Phone: | Office Phone: | SSN: | DBCN: | Accepted Use Policy: | Acceptance Date: | Way Accepted: | Reservations: The User has no

Callout boxes:

- If “active”, Patron can log into Sam. If “inactive”, use is blocked.
- Unlike Millennium, you can view the PIN. If patron wants to change pin, click “Change PIN / Password Next time, or edit the existing
- Add more time to the patron's session in increments.
- Reset the “users logs” to give patrons more daily log ins.
- Can be reset to give patron more time for future sessions
- If patron cannot log on, check to make sure this is unchecked.
- You must click “Save” after making ANY changes to the patron’s record.**

Account Status

1. Enter the patron record by Clicking “Make a payment” and search for patron. You can also click “Account Status” from the patron record screen.
2. Enter the amount of \$ the patron has given you.
3. Click Save

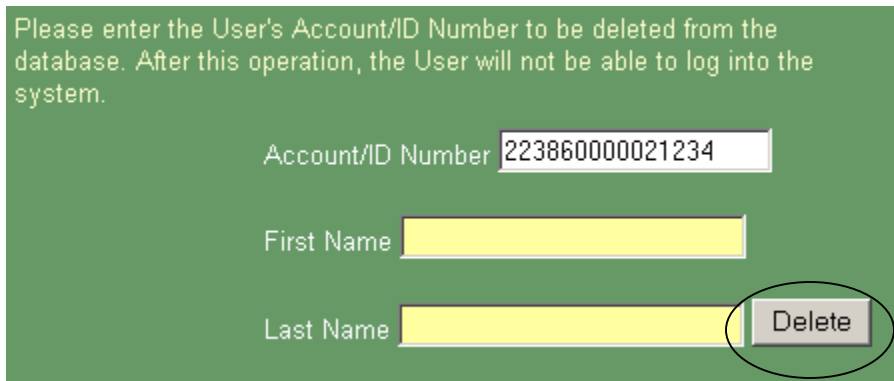
A green form with three input fields. The first field is labeled "The User has this Amount in their Account \$" and contains "5.00". The second field is labeled "The User owes this Amount \$" and contains "0.00". The third field is labeled "Enter Amount Paid" with a red arrow pointing to it and contains "1.00". Above the fields are "Save", "Reset", and "Help" buttons.

You cannot refund money in PC manager. Only the Administrator mode allows a negative number to be entered. Money remains on patron's record for future use. It is good at all SAM Libraries.

Money added to “visitor cards” will be lost at the end of the day. Only enter what will be used that day.

Delete User

Enter the patron's barcode and click delete. You do not need to enter the last or first name.

A green form with the instruction: "Please enter the User's Account/ID Number to be deleted from the database. After this operation, the User will not be able to log into the system." Below this are three input fields: "Account/ID Number" with the value "223860000021234", "First Name" (empty), and "Last Name" (empty). A "Delete" button is located to the right of the "Last Name" field and is circled in red.

Administrative Functions-User Maintenance

Add Location – Used to add a library or a new Zone

1. Enter a new location ID. The ID should begin with your 3 letter location code. It should not contain spaces or punctuation. Once created, the Location ID cannot be edited.
2. Enter the location name. The name can be typed in any format, but should include the library name and an indication of the zone's location or description. Once created, the Location Name can be edited.
3. Click Create Location

Please enter all the information required to create a new Location.
Default settings will be applied to this Location.

Location ID **No spaces or punctuation**

Location Name

Location Schedule - Maintains your library's hours, so SAM can shut down your PCs at the end of the day. You can edit this table. Mark the boxes you wish to save the changes to and click "save".

Location Schedule
After making changes, click the "Save" button

Location ID

Location Name

	Open Time		Close Time	Save
Sunday	<input type="text" value="1 PM"/>	to	<input type="text" value="5 PM"/>	<input checked="" type="checkbox"/>
Monday	<input type="text" value="9 AM"/>	to	<input type="text" value="9 PM"/>	<input checked="" type="checkbox"/>
Tuesday	<input type="text" value="9 AM"/>	to	<input type="text" value="9 PM"/>	<input checked="" type="checkbox"/>
Wednesday	<input type="text" value="9 AM"/>	to	<input type="text" value="9 PM"/>	<input checked="" type="checkbox"/>
Thursday	<input type="text" value="9 AM"/>	to	<input type="text" value="9 PM"/>	<input checked="" type="checkbox"/>
Friday	<input type="text" value="9 AM"/>	to	<input type="text" value="5 PM"/>	<input checked="" type="checkbox"/>
Saturday	<input type="text" value="9 AM"/>	to	<input type="text" value="5 PM"/>	<input checked="" type="checkbox"/>

Close PC's Before Library Closing **Determines how long before closing SAM shuts down your PCs.**

Mode

PowerDown Save M

Location Closed D

Logoff
ShutDown
Restart
PowerDown
None

Month Day

Reason Open Close

If you don't want Sam to Power down your PCs you can select another Mode.

WE WILL NOT BE USING THE CLOSED DAYS TABLE-It is a part of advanced scheduling, which MHLs libraries did not purchase.

Browser Control

Enter the web address that you would like your browser to start from. We are not using the filtering software (which is what all of the different levels provide for), but you can copy paste your address into safe harbor and or all of the rest.

Please select/enter the requested information and click Submit

Location

Browser Control

After making changes, click the Save button

Location ID

Location Name

Start Pages

Safe Harbor	<input type="text" value="http://www.poklib.org"/>	IP	<input type="text"/>	Port	<input type="text"/>
Safe Harbor(Alt)	<input type="text" value="http://www.poklib.org"/>	IP	<input type="text"/>	Port	<input type="text"/>
Restricted	<input type="text" value="http://www.poklib.org"/>	IP	<input type="text"/>	Port	<input type="text"/>
Restricted(Alt)	<input type="text" value="http://www.poklib.org"/>	IP	<input type="text"/>	Port	<input type="text"/>
Full Access	<input type="text" value="http://www.poklib.org"/>	IP	<input type="text"/>	Port	<input type="text"/>
Full Access(Alt)	<input type="text" value="http://www.poklib.org"/>	IP	<input type="text"/>	Port	<input type="text"/>

Internet Options

Set Browser Settings Set Default Start Page

Modify Invoice - Used to set up an "invoice" to print before any print job. You can select any of the items listed below to include in the "invoice". You can also select "Don't print invoice", if you prefer not to use one. Patrons are not charged for the printing of the invoice.

Modify Invoice Information

Please Select The Information That Will Print On The Invoice.

Print Invoice Don't Print Invoice

<input checked="" type="checkbox"/> Location ID	<input type="checkbox"/> PC ID	<input type="checkbox"/> Last <input type="text" value="19"/> Digits Of Account/ID Number
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Free Pages
<input type="checkbox"/> Copies	<input checked="" type="checkbox"/> Pages	<input checked="" type="checkbox"/> Document Title
<input checked="" type="checkbox"/> Total Amount	<input checked="" type="checkbox"/> Price Per Page	

Login Control –Controls how users can login and create new accounts. Also, where you can change your override password for the public PCs.

The screenshot shows the 'Login Control' configuration page. It includes a 'Save' button in the top right. The 'Location ID' is 'cat_ref' and the 'Location Name' is 'Catskill Reference'. There are four sections with checkboxes: 'New User s' (checked), 'Visitors' (checked), 'Multiple Logons' (checked), and 'Staff Member password' (with 'Sam' in the input field). Callout boxes provide the following explanations:

- Points to the 'New User s' checkbox: "Allows new users to enter their own info. We are using the Millennium account, so leave this unchecked."
- Points to the 'Visitors' checkbox: "Timed, but anonymous login. No printing control."
- Points to the 'Multiple Logons' checkbox: "If you want patrons to be able to log into multiple PCs, at the same time."
- Points to the 'Staff Member password' field: "Login used to override block and enable / disable SAM at the PC. Also overrides patron-initiated lockout."

Messages –Sam notifies patrons at different intervals regarding remaining session time. The timing of these messages is controlled in **Time Manager**, located lower down the menu. These are free text, and can be modified to suit your needs. Messages must be 99 characters or less.

Password Error-“Incorrect password entered, please try again.”

Log-in Card Error- “Incorrect card number entered, please try again.”

Expired Card –“Your card has expired. Please see the Librarian.”

Inactive Card – “Your account is inactive. Please see the Librarian.”

Inactivity Time warning – “Your internet session has been idle. Click OK to continue your session.”

Inactivity Close- “Sorry, browser closed due to inactivity.”

End of Session Warning 1 & 2-Blank by default so that you can add the time.

Example: “Your session will end in 5 minutes”

End of Session Warning 3 –Your session time has expired.

End of Daily Time - Time is almost up! Your session will soon end, Please save any open documents and close any open applications. You will have to print or cancel any remaining jobs in the Print Manager queue.

End of time - Sorry, your internet time has expired for today.

End of Day 1 & 2 – Blank by default, so that you can add time.

Example: “Your session on this computer ends in 5 minutes, because the library will be closing in 10 minutes.”

End of Day 3- The Library will close in less than 5 minutes, Please finish all activities in this computer.

Reserve Warnings 1 & 2 - Used in conjunction with remote reservations.

Reservation Block- Displays on the login screen until patron who has signed up for the computer logs in (5 minutes). “Sorry, this computer is reserved at this time for another patron”

Modify OPACS- Not used at MHLS

Print Control

Used for setting printer price per page and printer language. This is the first place to begin trouble shooting your SAM printing. Printers are added to the list the first time your PC is started up with SAM installed. If the printer already exists in SAM Print Control, it is not added. If it does not exist a new printer line is added. You should have one line for each printer that you use with SAM PCs.

Print Control Modify

Please select a printer from the list below to change.

Location ID

Location Name

Modify	Printer Name	Port Name
<input checked="" type="radio"/>	HP LaserJet 4050 Series PCL 6	IP_192.168.1.254
<input type="radio"/>	HP LaserJet 4050 Series PCL6	IP_192.168.1.254

Space between L and 6

! In this example, there should be only one printer, however the printers are named slightly differently on one or more pcs. Consistent naming would be the first step in troubleshooting. This is done on each PC in the printer folder.

You can look at the printer settings, by selecting a printer and clicking Modify.

Print Control Save

After making changes, click the "Save" button

Location ID

Location Name

Modify	Printer Name	Port Name
<input checked="" type="radio"/>	HP LaserJet 4050 Series PCL 6	IP_192.168.1.254

Printer Name Limit the number of pages you allow to print here.

Port Name

Price Per Page cents. Page Limit Free Pages

Applications allowed to print from (All, Internet, None)

Language Here, you can give patrons some free pages if you wish.

Purse Operation

Credit Limit \$ User will not print when credit is overdue.

You can set the price per page here.

You can allow patrons to print a given amount beyond the money they have in their account. Set the monetary amount you will allow them to go over here. You must unselect the check mark to activate the credit limit.

This MUST be filled with PCL5, PCL5e, PCL6, or PCL7. It must match the printer driver that is installed on your PC. This is critical to correct printing.

Note: This setup is done for each of your printers. Therefore, you can set up different price structures, free pages and credit for each printer.

Delete Printer – used to remove poorly configured or discarded printers.

Delete Printer
Please select a printer from the list below to delete.

Location ID **Select, then delete.**

Location Name

Delete	Printer Name	Driver Name	Port Name	Language
<input checked="" type="radio"/>	HP C LaserJet 4550 PCL	HP Color LaserJet 4550 PCL	IP_192.168.0.51	
<input type="radio"/>	HP LaserJet 4050 Series PCL6	HP LaserJet 4050 Series PCL	C:\Sam\SAM.NUL	

Reservations –Has not been purchased by MHLS libraries. This feature is used to allow patrons to reserve PCs from for future use via the Internet.

Resources – Displays the PCs that have logged into SAM at your location.

Resources
Select the Resource to Change

Location ID **To see PC details, select and then click Modify.**

Location Name

Modify	Resource Name	IP	Resource ID
<input checked="" type="radio"/>	ADULT1WIN2K	192.168.1.232	COMP01
<input type="radio"/>	ADULT2WINXP	192.168.1.226	COMP02
<input type="radio"/>	ADULT3WIN2K	192.168.1.228	COMP03
<input type="radio"/>	ADULT4WIN2K	192.168.1.227	COMP04
<input type="radio"/>	ADULT5WIN2K	192.168.1.230	COMP05
<input type="radio"/>	ADULT6WIN2K	192.168.1.234	COMP06
<input type="radio"/>	ADULT7WIN2K	192.168.1.236	COMP07
<input type="radio"/>	ADULT8WIN2K	192.168.1.214	COMP08
<input type="radio"/>	ADULT9WIN2K	192.168.1.252	COMP09

Above, is a perfect example of what your resources SHOULD look like. In this network, the PCs have been named using a formula.
Location/PC#/operating system
 The Resource ID, Which displays on the SAM login screen, indicates the PC number so that Patrons can locate the PC that they are assigned.

Resources
After making changes, click the "Save" button

Location ID **PC Resources Detail**

Location Name

Modify	Name	IP	ID
<input checked="" type="radio"/>	ADULT1WIN2K	192.168.1.232	COMP01

Computer Information
This section of the interface allows administrators to set resource information.

Name IP ID

Zone ID Station

Opac Users can reserve this resource

Def 1 Def 2

8 Leave these fields empty

Delete Resources – Used to remove PCs From your SAM Resources. If a PC is removed from your network you should remove the Resource. If you replace the PC, a new Resource will be created for it when it is logged on with SAM installed.

Add Staff Member-This will not be available. To add a new staff login, contact MHLS.

Modify Staff Member – Administrator level can edit the password and access level of staff logins.

Please select/enter the requested information and click Submit

Location

Modify Staff Member - Arlington Word PCs
Please select a Staff Member from the list below to modify.

Location ID

Location Name

Modify	UserName	Access Level
<input checked="" type="radio"/>	ARLAdmin	Administrator
<input type="radio"/>	ARLStaff	Staff

1. Select location
2. Select User
3. Click Modify

Modify password and access-Click Save

Modify Staff Member

After making changes, click the "Save" button

Location ID

Location Name

Modify	UserName	Access Level
<input checked="" type="radio"/>	ARLAdmin	Administrator

UserName Password

Location Access Type

You can Modify these fields.

Delete Staff Member

Delete Staff Member

Please select a Staff Member from the list below to delete.

Location ID

Location Name

Delete	UserName	Access Level
<input checked="" type="radio"/>	ARLAdmin	Administrator
<input type="radio"/>	ARLStaff	Staff

Select user and click Delete.

System Options – Controls How SAM opens in the client mode.

If you wish to turn SAM PC Timing off for your location, uncheck enable SAM and Enable Print. You can use SAM with Print disabled as well. You should not check Enable Desktop Controller, unless you have purchased SAM Desktop Security. You should always leave “do not require a Pin / Password” Unchecked.

Library Information
 Location ID: bearef
 Location Name: Beacon Public
Edit Location Name here

Running Mode
 Mode: PC Manager
 Menu ID: NONE

Computer Percentage Limit: 0

SAM Options	AUP Read	Age Advancement
Enable/Disable SAM's Options	Require Users	Enter Age User Advances to Next Level
<input checked="" type="checkbox"/> Enable SAM	<input checked="" type="radio"/> Yes	Safe Harbor
<input checked="" type="checkbox"/> Enable Print	<input type="radio"/> No	Safe Harbor(Alt)
<input type="checkbox"/> Enable Desktop Controller	<input type="checkbox"/> Reset Policies	Restricted
<input type="checkbox"/> Do Not Require A Pin / Password		Restricted(Alt)
		Full Access
		Full Access(Alt)

Annotations:
 - "Must be set to PC manager" points to the Running Mode dropdown.
 - "Menu ID NONE" is in a crossed-out box.
 - "Not used by MHLS Libraries" is in a large crossed-out box over the Age Advancement section.
 - "Set to yes, requires user to accept your policy." points to the "Require Users" radio button.
 - "Check = on" is in a box at the bottom left.

Time Manager - Controls the timing of messages displayed to the patron and automatic session ends.

Time Manager
 After making changes, click the Save button

Location ID: AD_Childrens
 Location Name: Adriance Childrens PCs

Inactivity Time: 6 Minutes
 Inactivity Time Warning: 3 Minutes
 End of Session Warning 1: 10 Minutes
 End of Session Warning 2: 5 Minutes
 End of Session Warning 3: 1 Minutes
 Library Close Warning 1: 10 Minutes
 Library Close Warning 2: 5 Minutes
 Library Close Warning 3: 3 Minutes

Use the example and descriptions below to configure your Time Manager.

The Messages can be edited using **Messages** from the left toolbar.

- logs off user after “6” minutes of inactivity.
- Sends a message warning about inactivity.
- Sends a warning message 10 minutes before end.
- Sends a warning message 5minutes before end.
- Sends a warning message 1 minutes before end.
- Sends warning that the library will close 10 minutes before session end.
- Sends warning that the library will close 10 minutes before session end.
- Sends warning that the library will close 10 minutes before session end.

Note: You can incorporate the timing in your message. Example: “The library will be closing at 5pm, your computer session will end in exactly 10 minutes”.

Associate Device
Menu Control
Modify Filters
Zone Maintenance
Add Zone
Modify Zone
Delete Zone
Metering
Add App / Web Site
Modify App / Web Site
Delete App / Web Site
Region Maintenance
Add Region
Modify Region
Delete Region
Assign Location

The menu items shown to the left will not be used by MHLS libraries. We hope to have them removed.

SAM Reports were not available at the time this document was created. They will be added as soon as they are available.

Sam Reports
User
Duplicate Names
User Usage
Print Control
Group
Computer
Reservation
Agency
Statistic Detail
Statistic Summary
Missed Reservation
App / Web Site
Account By Branch
Account By Device
Account By User
Account By Group
Device Reconciliation

Help and Contact-

You are welcome to peruse the SAM User Manual, but suspect you will find this document of more help. If you need assistance, please contact Laurie at MHLS (845-471-6060 X21) or the tech support hotline (845-471-3440). MHLS will contact Comprise with any questions or problems that cannot be solved onsite.

This section is to help you locate information in this document without having to read it!

How do I...?	Enable or Disable SAM	Pg. 10
	Change My Hours	Pg. 4
	Change the Timing of Messages	Pg. 10
	Unlock a patron locked computer	Enter Password Pg. 5