SwitchedOn

Everything You Need to Access the All-New ProQuest Platform

ProQuest Administrator Module User Guide

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1.1 Getting Started

The Administrator Module (**http://admin.proquest.com/**) lets you control the account settings for the account(s) you are responsible for.

If you are responsible for administering more than one account, select the account you want to change settings for from the Accounts menu at the top of the page. If you are managing consortia accounts, please note that settings do not automatically filter down from the main account to the sub-accounts, so you may need to change settings individually.

You can expand the Administrator Module window to fill the whole screen if you want to have more room by clicking the arrow tab on the right-hand side of the page. Your screen width setting will persist for the duration of your browser session.

You can choose an area from the navigation panels on the left of the page, or choose an option from the list of common tasks at the top of the page.

Once you have saved your changes, they will be applied to new user sessions within the main ProQuest interface. You will need to end your current ProQuest session if you want to pick up changes immediately.

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2. User Interface

2.1 User Interface Main Page

The Interface Settings area of the Administrator Module enables you to customize the appearance of the ProQuest interface for your account(s) in various ways, as well as creating specialized login links:

- **Interface Settings (Section 2.2)**
- **Branding (Section 2.3)**
- **Create a ProQuest Login URL (Section 2.4)**
- **Customize Subject Areas/Industries (Section 2.5)**

Once you have saved your changes, they will be applied to new user sessions. You will need to end your current session if you want to pick up changes immediately.

2.2 Interface Settings

You can control how the ProQuest interface will appear to users, and what features they will be able to use. This area of the Administrator Module is split into 3 sections; click the tabs at the top of the page to move between the sections.

2.2.1 Searching, Display, Citations, and Email

2.2.1.1 Search Pages
You can choose whether ProQuest searches for terms in **All fields + text**, or **All fields - CABS**. If you choose **All fields + text**, ProQuest will by default search for your terms everywhere in a document, including in full text. If you choose **All fields - CABS**, you will retrieve instances of your terms which occur anywhere except in the full text. **Note:** the Historical Newspapers, American Periodicals and British Periodicals databases will always search the full text, even if the **All fields - CABS** option is set in PAM.

Within the main ProQuest interface, checkboxes on the search pages allow you to limit your search to full text, peer-reviewed material (that is, research that has been evaluated by people in the same field in order to maintain quality), and/or items from scholarly journals (journals published for an academic audience by a recognized society with academic goals and missions). You can use the drop-down lists on the Interface Settings page in PAM to specify whether these checkboxes should display checked or unchecked by default in the main interface; you can also choose not to display these checkboxes if you prefer.

You can also choose whether the **Search Subject Areas/Search Industries** section on the Basic Search page displays as images, or as a complete list of databases.

2.2.1.2 Search Term Suggestions (often called autocomplete)
You can choose whether to enable or disable autocomplete for your users. If you choose to enable this feature, when your users type in the search box, a list of terms (always based on what they've typed at any point) begins to display beneath the box. These terms are in a dictionary built from previous successful searches by all users. Users can click a term in the list to search on it immediately.

2.2.1.3 Results, Document Display, Linking
You can set the number of items per page that will display on Search Results pages. The default number is 10 items per page, but you can change this to 20, 50, or 100.

By default, results are sorted by relevance, meaning the most useful articles should sort to the top of the list. You can use the Default sort order drop-down to change the default display to oldest items or most recent items first. You can also set a different default sort order for news and newspaper content if required.

Relevance is calculated on the basis of the number of times your search term appears in an article, which field it appears in, and where in the document it appears.

Important to know: If your users have My Research accounts, they can change the default sort order for all search results on the Preferences page within ProQuest. What they specify there will be in effect anytime they use ProQuest and sign in to My Research. When they change the sort order directly on a Search Results page, their selection will last only for the duration of their current session.

ProQuest offers "on-the-fly" machine translation of selected content. The Administrator Module enables you to choose whether or not to include this functionality on the Document View pages. If you choose to include this option, users will be able to click the **Translate** link next to the abstract or full text of an item they are viewing, select the language they want to translate from and the target language, then click **Go** to translate the text.

If a user is viewing the record for an item with no full text available that does not have copies available within your institution, and at least one outbound custom link has been added in the Administrator Module using the link resolvers or OpenURL links, clicking the "Find a copy" link will show a list of all available custom links to that resource that have been added. If one of the custom links is set as the default, then the specified link will appear on the Search Results and the "Find a copy" link will not display.

Note that the "Find a copy" feature does not include links from ProQuest to other full-text resources that have been set up using **resource linking with OneClick™ (Section 4.2).**

The Administrator Module also enables you to change the link text for "Find a copy" links to your own wording.

2.2.1.4 Ordering copies of dissertations and theses
Users can order hard copies of dissertations or theses from within ProQuest. The first time they place an order they will need to set up an account; thereafter their billing and shipping information will be retrieved automatically when they log in with their username and password to place an order. Users can order copies by clicking the link that appears on the Search Results or Document View pages for an item. You can enable or disable these links in the Administrator Module. If you choose to enable the link, you can also specify custom link text.

2.2.1.5 General settings
You can set the default language for the ProQuest interface. You can either choose an interface language from the drop-down list, or select the **Let the browser choose** option if you want ProQuest to detect where you are accessing the internet from and change the interface language accordingly. Note that if you select this option but the browser is set to a language other than those supported by the ProQuest platform, the interface will display in English.

You can also specify which page users will be taken to on first accessing ProQuest by choosing an option from the **Start users** on drop-down list.

2.2.1.6 Citation
You can set the default citation style that will be used throughout ProQuest. The following citation styles are available:

- APA 6th – American Psychological Association, 6th Edition (http://www.quikbib.com/APA6help.htm)
- APA 5th – American Psychological Association, 5th Edition (http://www.quikbib.com/APAhelp.htm)
- APA 6th – Annotated with Abstracts – American Psychological Association, 6th Edition (http://www.quikbib.com/APA6Annohelp.htm)
- APA 5th – Annotated with Abstracts – American Psychological Association, 5th Edition (http://www.quikbib.com/APAAnhelp.htm)
- AMA – American Medical Association, 10th Edition (http://www.quikbib.com/AMAhelp.htm)
- ASA – American Sociological Association, 3rd Edition (http://www.quikbib.com/ASAhelp.htm)
- BibTeX (http://www.quikbib.com/bibtexhelp.htm)
- Chicago 15th Edition (Author-Date System) (http://www.quikbib.com/chicagohelp.htm)
- Chicago 15th Edition (Notes & Bibliography) (http://www.quikbib.com/chicagonoteshelp.htm)
- Chicago 16th Edition (Author-Date System)

- Chicago 16th Edition (Notes & Bibliography)
  (http://www.chicagomanualofstyle.org/tools_citationguide.html)
- Council of Biology Editors – CBE 6th, Citation-Sequence (http://www.quikbib.com/CBEhelp.htm)
- Council of Biology Editors – CBE 6th, Name-Year Sequence (http://www.quikbib.com/CBE6nameyearhelp.htm)
- Harvard (http://www.quikbib.com/Harvardhelp.htm)
- Harvard – British Standard (http://www.quikbib.com/HarvardBritishStandardHelp.htm)
- MLA 7th Edition (http://www.quikbib.com/mla7help.htm)
- MLA 6th Edition (http://www.quikbib.com/mlasubhelp.htm)
- MLA 6th Edition, Annotated with Abstracts (http://www.quikbib.com/mla6annohelp.htm)
- Turabian 7th Edition (Notes) (http://www.quikbib.com/turabian7noteshelp.htm)
- Turabian 7th Edition (Reference List) (http://www.quikbib.com/turabian7reflisthelp.htm)
- Uniform – Uniform Requirements for Manuscripts Submitted to Biomedical Journals
  (http://www.quikbib.com/uniformhelp.htm)
- Vancouver (http://www.quikbib.com/vancouverhelp.htm)

As well as setting the default citation style, you can also specify which styles to make available to users in the main ProQuest platform. Available styles are shown as checked in PAM; to remove a style from the ProQuest interface, uncheck the checkbox next to that style.

2.2.1.7 Email
ProQuest offers users the ability to email articles to themselves or others; you can disable or enable this option via the Administrator Module.

You can also set the default format for received emails. If you want your users to be able to include images or styling in the emails they will receive, select **HTML format**.

2.2.2 RefWorks
RefWorks is a bibliographic management system that enables your customers to store citation information, organize citations into folders, link to the full text of resources, and quickly construct citations and bibliographies.

If your customers will be accessing RefWorks as part of an organizational subscription when exporting citations from ProQuest, you can store the **Group Code** here. This allows off-site access to RefWorks from any computer.

For more information on RefWorks, please see **http://www.refworks.com/**

2.2.3 Trial databases
If you have contacted ProQuest Customer Services to arrange trial subscriptions to any databases, you can use the **Trial database settings** section within the **Interface Settings** area of the Administrator Module to choose whether or not you want trial databases to be visible to all your users in the ProQuest interface on the Database Selection page.

You can also specify whether or not you want to include a link for users to provide feedback on any trial databases. Two options are available; you can either set up an email link, or you can direct users to a feedback page by specifying a URL. In both cases, the link will appear in the panel on the right-hand side of the Select Databases page in ProQuest.

You can also use trial database settings on the **Customize Subject Areas (Section 2.5)** and **Create ProQuest Login URL (Section 2.4)** pages.

2.2.4 Transactional Account Settings (professional interface only)
Project code tracking
Some users of the professional interface, such as legal firms, researchers or consultants, may need to track charges incurred while using ProQuest so they can bill their clients. PAM allows you to enable/disable project code tracking by clicking the **Enable project code tracking** checkbox.

By default, project code tracking is disabled; if you choose to enable it for your institution, authenticated users will initially be taken to a page where they can enter a specific project code. All transactions during that session will be recorded against that code to enable them to bill/invoice against particular clients or projects.

Transactional limit

If your institution has access to databases that are transactional, you can set a maximum spending limit per session. By default, no limit is set; to set a limit, simply tick the **Limit transactional spending per session** checkbox, then enter a maximum spending limit in the field below.

If you have chosen to set a spending limit, authenticated users will see a warning message if they complete a transaction that takes them over the specified limit.

2.3 Branding

You can customize your ProQuest site by adding Library Branding to each page:

Text links

You can display up to two text links. You can customize the text to display, and the site it will link to. You can also specify whether the link should open in a new window or in the same window.

Custom text

You can add a paragraph of custom text to the bottom of each page of the ProQuest interface.

Logos

You can set select a primary and a secondary logo to display at the bottom of your ProQuest pages. Logos must be a .jpg or .gif format file and cannot exceed 20K. You can add alternative text, and specify the site the logo will link to. You can also specify whether the link should open in a new window, or in the same window. Note that your logos should be no larger than 120 pixels in width and 120 pixels in height.

Multiple accounts/consortia links

In cases where an account has one or more sub-accounts, parent accounts can choose to cascade one of the aforementioned links and logos to all of its child accounts by clicking the **Apply to all sub-accounts** checkbox. The sub-accounts will then automatically display the branding inherited from the parent account in the ProQuest interface.

If you have chosen to apply branding from a parent account to all child accounts, a reminder of this will appear on the branding page for those sub-accounts within the ProQuest Administrator Module. Similarly, if a child account has had no specific branding added, but has inherited branding from a parent account, this will be indicated in the ProQuest Administrator Module, along with details of the relevant parent account. Inherited branding can only be removed by the parent institution that added the branding.

Note that inherited branding will apply to **all** sub-accounts; it is not possible to set inherited branding for individual sub-accounts.

2.4 Create a ProQuest Login URL

You can create specialized links to databases or combinations of databases that lets users access ProQuest with specific settings.

For example, you can create a customized link for Hispanic users who want to search selected Spanish newspaper databases, setting the default language to Spanish and the default search set to Publications Search. You can create a second link for others with the default search set to Basic Search. Users can then select the link they want and open ProQuest with the desired settings. These links can be used to build a custom database menu on your local web site, to add shortcuts to your computer desktops, or to enhance your Favorites menus.

If you are responsible for administering more than one account, select the account you wish to create a URL for from the **Accounts** menu at the top of the page.

You can select individual databases or entire subject areas/industries to add to your URL; you can also choose whether or not to show all databases as selected by default on the Select Databases page. You can also choose which search page will open from the Select Databases page by choosing from the **Default search mode** drop-down list.

You also have the option of setting the interface language. You can either choose the default language for your account, or choose another interface language from the **Interface Language** drop-down list.

You can also specify which page users will be taken to on first accessing ProQuest by choosing an option from the **Start users on** drop-down list. Again, you can use the default settings for your account or choose an option from the list.

If you have contacted ProQuest Customer Services to arrange trial subscriptions to any databases, you can use the **Include trial databases** drop-down list to choose whether or not you want your URL to include trial databases, or use the default setting.

Once you have customized the settings, click **Create link** to generate the login URL. You can then copy and paste the link for use in your documents, web pages, OPAC etc., or you can create a desktop icon for your users by pasting the link into the Address bar of your browser, then dragging the URL from the Address bar to the Desktop.

2.5 Customize Subject Areas/Customize Industries

You can create new subject areas and assign databases to them, or edit the databases that are included in existing subject areas, and customize the image that appears for subject areas in the ProQuest interface.

Note that subject areas in the academic interface are referred to as industries in the professional interface.

You can switch the default set of subject areas assigned to your institution's account; different databases/subjects will be available for different accounts.

You can change the order in which the subject areas will appear listed in the interface; click the **Define order of subjects** tab, then drag and drop the boxes into the order you require, and click **Save Changes**.

If you want to remove a particular subject area from the interface, you can do so by clicking **Delete** next to a subject on the **Subject areas/Industries** tab (Note: This does not remove the databases included in that subject area from your account). If you have deleted a subject area/industry but wish to return to the original ProQuest predefined subject/industry groupings, click **Restore default settings**.

Once you have saved your changes, they will be applied to new user sessions within the main ProQuest interface. You will need to end your current session if you want to pick up changes immediately.

Switching default subject areas/industries
You can switch the default subject areas/industries (for example, Higher Education or Community College) that your account is assigned to by clicking **Switch default subject area** and choosing the relevant set of subject areas/industries from the list using the radio buttons.

If you want to view a list of the subjects/industries that each set contains, move your mouse over the information icon next to each subject area set name.

Editing existing subject areas/industries
1. On the **Subject areas/industries** tab, click **Edit**

2. Type a new name for the subject area/industry if required

3. Select which databases you wish to include/exclude using the checkboxes

4. If you want to change the image that will be associated with the subject area in the ProQuest interface, click the **Select Image** tab and choose an image

5. Click **Update subject/Update industry**

Creating new subject areas

1. On the **Subject areas/industries** tab, click **Create New Subject/Create New Industry**

2. Type a name for the subject/industry

3. Select which databases you wish to include/exclude using the checkboxes

4. If you want to change the image that will be associated with the subject area in the ProQuest interface, click the **Select image** tab and choose an image

5. Click **Create subject/Create industry**

Stored profile

If you have customized your subject areas but decide later that you want to return to the default settings, you can do so via the **Stored** profile tab. Click **Restore this profile** to return to your original settings.

If you have made edits to the subject area groupings, but have then chosen to return to the original ProQuest settings using **Restore Default Settings**, this will remove all custom-made and edited Subjects from the ProQuest interface. These will be saved and can be restored by going to the 'Stored Profile' tab and clicking **Restore this profile**.

3. Usage Reports

3.1 Usage Reports Introduction

You can retrieve ProQuest usage reports that provide account-specific details such as usage summaries by account, site/user, search type, time or database. This information lets you see usage patterns, popular searching mechanisms and databases. You can use this information to make sure that your ProQuest account meets the needs of your users—providing the right databases, supplying users with the correct access, and that the default settings are configured properly.

You can also access usage reports for previous interfaces if you need to view this information as you transition to the new ProQuest interface.

The document count included in the usage report is incremented at the start of document delivery from the ProQuest electronic vault.

If a file is requested multiple times within a specific time frame (10 seconds for html, and 30 seconds for pdf files), the duplicate requests are not counted.

The search count is incremented each time **Search** is clicked. If you click the button again to retrieve the next set of results, the count is not incremented.

3.2 Request Usage Reports

You can use the **Request Usage Reports** page to generate usage statistics for ProQuest databases in a variety of formats.

If you have access to multiple Accounts or clients, select the account for which you wish to generate usage reports from the drop-down menu located above the tabs. If an account includes sub-accounts, you can choose whether or not to include these in your usage reports by selecting the checkbox; by default, sub-accounts will automatically be included.

When you choose the report type you require from the drop-down list, you can view a summary of what is included. In the case of all report types except New York Times Index searches and COUNTER Consortium Reports 1 and 2, you can also view a sample report for each report type.

By default, items with zero usage will **not** be included in your usage reports; however, if you want to include them, you can do so by selecting the checkbox. Please note that the option to include items with zero usage is not included in the following report types: COUNTER Database Report 3, COUNTER Database Report 2, COUNTER Consortium Report 2, Document Usage by Organization, Searches by Search Mode, Searches by Time, and Document Usage by Delivery Method.

You can choose the time period you want your usage reports to cover by selecting from the date drop-downs; note that the contents of the date lists may change depending on the report type and/or delivery method you have chosen.

Delivery Method

The Delivery Method option lets you select how you would like to receive your report. Depending on the method you select, the delivery format options will vary. The available methods are:

• **View my report on a Web page:** the report will display within 90 seconds

• **Email a report now:** the report will arrive by email within 24 hours

• **Download a report now:** the report can be downloaded immediately

• **Schedule a regular report by email:** you can specify a regular day/month for delivery of reports using the drop-down lists, and also specify when you want your reports to start from

Delivery Format

If you choose to email, download, or schedule a regular email delivery of your usage reports, the Delivery Format option lets you select how you would like to receive your report. Depending on the method you select, the delivery format options will vary. The available methods are:

• **HTML:** view usage reports in your web browser

• **CSV file:** a comma-separated values file, suitable for use with Excel

• **Tilde delimited file:** suitable for use with spreadsheet software

• **COUNTER XML:** for COUNTER reports only, an XML file formatted according to the Counter 2 standard, using the Counter DTD

Note: Not all formats are available for all report types; the Database Activity – Annual report is only available in HTML format, and COUNTER Consortium Reports 1 and 2 are only available in COUNTER XML format. All other report types are available in HTML, csv and tilde delimited formats; in addition, the COUNTER format reports are also available in COUNTER XML format.

3.3 Scheduled Usage Reports

You can set up a regular delivery of usage reports by email. You can schedule delivery for multiple report types, as well as for different client accounts. You can view and manage your scheduled reports using the Schedule Usage Reports page.

By default, reports are sorted in ascending alphanumeric order by Client Account name. You can re-sort the list in ascending or descending alphanumeric order by any of the columns (except Edit/Delete) by clicking the arrows in the column headings.

If you want to edit one of your scheduled reports but do not want to change all the report settings, you can click **Edit** to open the Request Usage Reports form with your settings already filled in. You can then edit only the settings you wish to change, and then click **Create Report** to update the scheduled delivery with the new information.

4. Linking In/Out

4.1 Linking In/Out Introduction

You can integrate your library holdings to your ProQuest account by using the Administrator Module to set up outbound or inbound linking.

ProQuest has set up predefined links with several linking partners, providing users with a quick and easy way to link to other full text providers such as SWETS and OCLC.

The following methods of linking are available:

- **Resource Linking with One Click™ (Section 4.2)**
- **Custom Resource Linking (including Link Resolvers) (Section 4.3)**
- **Custom Resource Linking Inheritance (Section 4.4)**
- **Request This Item Settings (Section 4.5)**
- **Set up holdings for PubMed LinkOut (Section 4.6)**
- **Google Scholar Library Links (Section 4.7)**
- **Direct Links to External Content (Section 4.8)**

4.2 Resource Linking with One Click™

This feature uses an OpenURL link resolver to conveniently link from ProQuest citations directly to the full text in your library's other resources. When full text is not available in ProQuest, but is available in one of your other resources, your users will see a link to the full text within ProQuest.

If you are responsible for administering more than one account, select the account you wish to change settings for from the **Accounts** menu at the top of the page. If you are managing consortia accounts, please note that settings do not automatically filter down from the main account to the sub-accounts, so you may need to change settings individually.

If you have a **Serial Solutions (http://www.serialssolutions.com/)** account, information on the resources you have access to will be automatically provided. So you can enable linking immediately by simply selecting the **Enable resource linking with One Click™** checkbox and clicking **Save changes**. To disable linking, deselect the checkbox and click **Save changes**.

If you do not have a Serials Solutions account, you can enable resource linking with One Click™ as outlined below:

1. Enter any proxy server details if required.
2. Choose an authentication method from the drop-down list.
3. Navigate the list of resource providers by clicking **+** (expand) and **–** (collapse), then select or modify the list of resources you have access to by selecting the checkboxes next to the relevant resources. The OpenURL resolver will look in these resources for full text when it is not available in ProQuest.
4. Enter any additional authentication information required by individual resource providers.
5. Select the **Enable resource linking with One Click™** checkbox, then click **Save changes**.

Entering proxy server details

If you don't know the Proxy URL, check with your proxy administrator. Instructions for specific authentication types:

- **EZ Proxy:** At the end of the url, make sure to include /login?url=. Example -- http://proxy.lib.edu:2048/login?url=http://000.58.210.244:2048/login?url=
- **Innovative (III) Proxy**: Make sure you remove the 0-from the proxy prefix. It will be automatically added by our system. Example — http://lib.umi.edu
- **Custom:** Make sure to end the proxy URL with the parameter that accepts the target URL. Example -- http://custom.proxy.lib.edu/login?u=

Additional authentication information

Some resource providers require or recommend that client-specific information be included in all links to their content for the purposes of helping to authenticate users or determine which account a user is trying to access.

There are currently four providers that require this authentication information: CSA, Factiva, OCLC, and Gale. If you select a resource from one of these providers, you must also provide the identification information below. As different authentication may be allowed per resource, you must provide this information for each resource that is selected for one of these providers.

- **Dow Jones Factiva:** Factiva XSID: Factiva resources require an XSID. This is a combination of alphanumeric characters that that uniquely identifies your institution.
- **OCLC:** OCLC Autho ID: OCLC resources require an Autho ID or Authorization ID. This is a numeric code that uniquely identifies your institution.
- **Gale:** LocID: Gale resources require a LocId or Location ID. This is a combination of alphanumeric characters that that uniquely identifies your institution.
- **CSA:** Username and password.

4.3 Custom Resource Linking (including Link Resolvers)

You can integrate your library holdings to your ProQuest account, and set up outbound OpenURL linking on the Search Results or Document View in ProQuest to other resources which your institution subscribes to, in cases where ProQuest does not have full text for a cited item.

You can easily administer links using the Administrator Module. As well as setting up **Resource Linking with One Click™ (Section 4.2)**, you can choose from predefined links with several linking partners, providing users with a quick and easy way to link to other full text providers such as OCLC.

Which link type you want to use depends on how you will be using your link. When possible, use one of the predefined links:

Create Your Own Custom Link:
- Add a new custom link.

Lets you create a link to your OPAC.

A-Z List:
- **Journal Linker (http://www.serialssolutions.com/)**

Lets you create a link to an A-Z List—software or a service that provides a list of journals and journal-level links to the journals your library subscribes to.

Link resolver:
- **360 Link (http://www.serialssolutions.com/)**
- **SFX (http://www.exlibrisgroup.com/)**
- **WebBridge (http://lib.hku.hk/)**
- **1Cate (http://www.oclc.org/)**
- **Tour (http://uk.ihs.com/)**
- **LinkSource (http://www2.ebsco.com/)**
- **Ovid's Linksolver (http://ovid.linksolver.com/site/index.jsp)**
- **Journal Finder (http://www.wtcox.com/journalfinder.html)**

Lets you create a link to a Link Resolver—an application that receives an incoming OpenURL and translates it to a target specific URL.

Document Delivery:
- **Infotrieve Gateway (ILL) (http://www.infotrieve.com/)**
- **OCLC ILLiad (http://www.oclc.org/)**

Lets you create a link to a Document Delivery service, such as an Interlibrary Loan service.

Online Public Access Catalog:
- **OCLC WorldCat (http://www.oclc.org/)**

Lets you quickly create a CrossLink to OCLC WorldCat.

Adding a new custom link
You can create a custom, predefined link for collections you subscribe to. This lets you use the power of the flexible metadata information in your links. To create a custom link:

1. Select the **Enable this custom link** checkbox.
2. Enter the **Local Administrator Label**. This is the text that appears next to the link within the Administrator Module.
3. Enter a URL for the resource you want to link to. This must be a fully qualified URL and it must start with **http://** or **https://**
4. If necessary, add any metadata fields to the URL by choosing from the drop-down list and clicking **Add to URL**.
5. If you want to link to an icon for the collection, click **Change Edit Graphic** icon, then enter the image address and some alternate text and click **Save**. Your icon must measure 20 by 88 pixels.
6. Click **Edit Link Text** to add some text that will be used as the label that users will see within ProQuest, then click **Save**. The maximum length for this text is 76 characters.
7. Choose whether you want the link to display as an icon, a text link, or both on the Citation/Abstract page.
8. Select the checkbox if you also want the link to appear on results pages. You can then choose whether you want the link to appear for all articles or for only those where no full text is available in ProQuest. You can also choose whether you want the link to appear as a text link or as a graphic.
9. Click **Save changes**.

Note: It is only possible to display one type of linking graphic on the Results page. This means that once you select to display this graphic, this option will not appear for any other links you may create. If this option does not appear for this link, it means that a graphic has been enabled for another link.

You can include the following variables in your custom links:

Variable	Description
TITLE	Title of a journal, book or conference proceedings
AUTHOR	The full name of a single author; "Smith, Fred M' or "Harry S. Truman," for example
AUFIRST	First author's given name or names or initials. This data element may contain multiple words and punctuation, i.e. "Fred F," "Fred James."
AULAST	First author's family name. This may be more than one word. In many citations, the author's family name is recorded first and is followed by a comma, i.e. Smith, Fred James is recorded as aulast=smith.
AUINIT	First author's first and middle initials.
AUSUFFIX	Author suffix, e.g. Sr., or Jnr.
ISBN	International standard book number.
ISSN	International standard serial number. Use ISSN if your system uses ISSN codes in the 8 digit numeric format (no hyphen).

ISSNH	Use ISSNH if your system uses ISSN codes in the 4-4 format (with a hyphen).
SID	Service Identifier, that is, the vendor of the information service where the metadata originates.
FORMAT	Format.
GENRE	Genre, e.g. journal, book, conference, article.
VOLUME	Volume that article is located in.
ISSUE	Issue that article is located in.
SPAGE	Starting page of article.
DATE	Date of publication.
DOCID	Document Identifier.
STYPE	Source Type.
PUBNAME	Publication Name.
DATE:YYYY-MM-DD	Date.
ERIC	Education Resources Information Center Accession Number.
UMDISS	UMI Dissertation Number.

Important to know: the URL that you create must be formatted with an ampersand (&) after each variable that you select. For example, www.institution.com/Title<title>&Author<author>&Date<date>&ISSN<issn>.

Setting up other methods of resource linking

In addition to setting up your own custom links, you can also set up links using other link resolvers and document delivery systems by choosing one of the links in the Administrator Module and following the instructions below:

1. Select the **Enable this custom link** checkbox.

2. Enter any base URL or authorization information as necessary (this varies according to the link resolver you have selected).

3. If you want to link to an icon for the collection, click **Edit Graphic** icon, then enter the image address and some alternate text. Your icon must measure 20 by 88 pixels.

4. Click **Edit Link Text** to add some text that will be used as the label that users will see within ProQuest, then click **Save**. The maximum length for this text is 76 characters.

5. Choose whether you want the link to display as an icon, a text link, or both on the Citation/Abstract page.

6. Select the checkbox if you also want the link to appear on Results pages. You can then choose whether you want the link to appear for all articles or for only those where no full text is available in ProQuest. You can also choose whether you want the link to appear as a text link or as a graphic.

7. Click **Save changes**.

Note: It is only possible to display one type of linking graphic on the Results page. This means that once you select to display this graphic, this option will not appear for any other links you may create. If this option does not appear for this link, it means that a graphic has been enabled for another link.

4.4 Custom Resource Linking Inheritance

Applying resource linking settings to sub-accounts
If you are the administrator for an account that has one or more levels of sub-account, you can apply all your custom resource linking or predefined resource link settings automatically to all sub-accounts.

By default, settings are not cascaded to any sub-accounts, but you can cascade settings down the account hierarchy by clicking the checkbox on the Settings page and clicking **Save changes**.

Your settings will be applied both to your account and to any sub-accounts. Any changes you subsequently make to your settings for the parent account will also be automatically applied to the sub-account(s).

If you later decide you do not want the sub-accounts to share the settings from the parent account, simply 'untick' (deselect) the checkbox and click **Save changes**.

Opting out of using inherited resource linking settings
If you are administering a sub-account, you can opt out of any resource settings that have been inherited from the parent account by unticking the **Use resource** checkbox and clicking the **Save changes** button. The resource will continue to be listed in PAM, but the resource will not appear in the main ProQuest interface; if you decide later on that you want the sub-account to opt in to an inherited resource, simply tick the checkbox and click **Save changes** to enable the link in the main ProQuest interface.

4.5 Request This Item Settings

You can create a form that your users can use to request copies of items in ProQuest. If you enable this option by selecting the checkbox, a **Request this item** link will appear next to items in ProQuest; the user can click the link to fill in a form to request a copy of that item. When the user submits the form, you will receive an email prepopulated with their contact details and information about the item they are requesting.

You can set up the form to send the email to a single email address or to multiple recipients; you also have the option of setting up a separate email that your users can use if they have questions about their request.

You can customize the appearance of the link to the form in the ProQuest interface by specifying your own link text and/or graphic; you can also add custom text at the start of the form.

If appropriate, you can choose to display a United States "fair use" copyright restriction message at the bottom of the form by selecting the checkbox.

Once you have enabled the form and customized your settings, click **Save changes** to activate the link.

4.6 Set Up Holdings for PubMed LinkOut

This service enables you to set up links to ProQuest from other resources in cases where those resources have citations for which ProQuest has full text available. This makes it easy to access relevant full text articles and other online resources. See **http://www.ncbi.nlm.nih.gov/entrez/linkout/** for more information.

The Administrator Module helps you quickly and easily provide information to PubMed about your library's full-text resources at ProQuest. Then, when your users search for articles at PubMed, they can link directly to the full text at ProQuest.

You can provide your library's PubMed account information, and ProQuest will begin delivering a file to PubMed of the full-text resources available to you. This file will be automatically updated each week. PubMed uses this list to provide links to the full text of those articles. When your patrons view a citation/abstract in PubMed that is available in full text through ProQuest, they will see a ProQuest link. When they click this link, they will be taken to the full-text article.

Before you can start delivery of your holdings for PubMed LinkOut, you must have already established a LinkOut account for your library in PubMed. To set up your delivery, you will need the Library username and Provider ID number provided when you set up your account. If you don't already have an account, you can find information on the registration process at **http://www.ncbi.nlm.nih.gov/books/bv.fcgi?rid=helplink-out.section.lib.Library_Registration.**

To set up your holdings for PubMed LinkOut:

1. Enter your Library username and Provider ID number
2. Select the **Enable holdings file delivery to PubMed LinkOut** checkbox
3. Click **Save changes**

You will see a message saying that your changes have been saved and that your holding file is being produced; please allow a week for delivery. You can cancel delivery by deselecting the checkbox and clicking **Save changes**.

This feature can only produce a single holdings file for your ProQuest account. This means that your ProQuest account can correspond to only one PubMed profile. If your institution has multiple PubMed LinkOut profiles, you will need to select a single profile to use for the ProQuest holdings or contact ProQuest Customer Services to have a hierarchy of ProQuest accounts created.

4.7 Google Scholar Library Links

This service enables you to set up links to ProQuest from other resources in cases where those resources have citations for which ProQuest has full text available. This makes it easy to access relevant full-text articles and other online resources. See **http://scholar.google.com/intl/en/scholar/libraries.html** for more information.

Once you have set up an account with Google Scholar, you can enable/disable Google Scholar Library Links in ProQuest by selecting/deselecting the **Enable holdings file delivery to Google Scholar** checkbox and clicking **Save changes**. You will see a message saying that your changes have been saved, and that your holdings file is being produced; please allow a week for delivery.

4.8 Direct Links to External Content

If your institution subscribes to the ProQuest *International Index to Music Periodicals* and *International Index to the Performing Arts* databases, you can use the Administrator Module to enable/disable linking from ProQuest to full text articles in JSTOR, Project MUSE or Naxos Music Library. Note that you must also subscribe to the relevant external content provider in order to be able to access this feature.

To enable external content linking, select the checkbox(es) next to the collection(s) you want to link to. Your users will then see links to full text in those collections when they are viewing relevant citation information within ProQuest. To disable linking to external content, simply deselect the checkbox(es).

In addition to enabling or disabling Naxos linking in the Administrator Module, you can store your Naxos Music Library Subdomain Name here.

For more information regarding the external content that is available to subscribers from within ProQuest, please visit the following sites:

- **JSTOR (http://www.jstor.org/)**
- **Project MUSE (http://muse.jhu.edu/)**
- **Naxos Music Library (http://www.naxosmusiclibrary.com/)**

5. Authentication/Access

5.1 Authentication/Access Introduction

You can specify various authentication methods for your account(s):

- **IP Address (Section 5.2)**
- **Proxy (Section 5.3)**
- **Barcode (Section 5.4)**
- **Shibboleth (Section 5.5)**
- **Referring URL (Section 5.6)**
- **My Research (Section 5.7)**
- **Manual Login (Section 5.8)**
- **Additional Authentication Options (Section 5.9)**

5.2 IP Address Authentication

You can limit access to your ProQuest site by entering IP addresses. Only computers with IP addresses that match those you have entered will be permitted to access your site. IP address restriction is a good security option for local access.

You can enter a single IP address or a range of addresses. For security purposes, ProQuest does not allow any overlap in IP addresses; please be as specific as possible when entering IP ranges. You can also create usage groups and assign users to those groups.

If you are responsible for administering more than one account, select the account you wish to change settings for from the **Accounts** menu at the top of the page. If you are managing consortia accounts, please note that settings do not automatically filter down from the main account to the sub-accounts, so you may need to change settings individually.

If you receive an error message when trying to enter an IP range or address, there is probably a conflict with another ID or another account. Contact Customer Support for more help.

5.3 Proxy Server Authentication

A proxy server is a server that acts as an intermediary between your users and the Internet so that you can ensure security and improve performance. You can enable authentication/access via proxy server in the Administrator Module by entering your Proxy URL and clicking **Save changes**. If you don't know the Proxy URL, check with your proxy administrator.

Note that only one proxy URL can be used by an account at any one time.

Instructions for specific authentication types:

- **EZ Proxy:** Make sure to include /login?url= at the end.Examples — http://proxy.lib.edu:2048/login?url=http://000.58.210.244:2048/login?url=
- **Innovative (III) Proxy:** Make sure you remove the 0-from the proxy prefix. It will be automatically added by our system. Example — http://lib.umi.edu
- **Custom:** Make sure to end the proxy URL with the parameter that accepts the target URL. Example — http://custom.proxy.lib.edu/login?u=

5.4 Barcode Access

You can configure your server to permit remote users (such as library customers connecting from home), to access ProQuest through your server using a barcode or other remote user ID. These settings ensure that your ProQuest links are protected from unauthorized use.

Adding a barcode pattern

This remote access method validates the patron barcode on the basis of correct length, prefix and checkdigit calculation.

1. If you have set up more than one usage group, select the group you wish to set up authentication for from the drop-down list. To set up a new usage group, select **New...** from the drop-down, then enter the group name and click **Add usage groups**.

2. In the **Barcode pattern** area, enter the pattern to use when matching barcodes. The pattern can be from 5 to 50 characters in length. If you want to match a specific alphanumeric character (A-Z, or 0-9) enter that character. For example, to match a prefix, such as **12345**, enter **12345**. To match any alphanumeric character, enter the * character. If you are using a checkdigit, enter the checkdigit using the * character. **Note**: The prefix cannot contain the * character.

3. Specify whether you wish to allow digits only, or digits and letters, as valid characters using the radio buttons.

4. Select the desired checkdigit method. To use multiple checkdigit methods, you can enter multiple barcode patterns.

5. Click **Add pattern**.

6. Repeat steps 1 through 5 to add any additional barcode patterns.

Check digit methods

This section on the **Add barcode pattern** page lets you select how check digits are handled. Check digits are a form of error checking, consisting of a single digit generated from the other digits in a barcode; this enables the detection of input errors.

Select the option you want to use:

- Codabar – there is no officially designated check digit, but many libraries use their own standard; see **http://www.mecsw.com/specs/codabar.html** for more details

- Dynix – Prefix value is numeric and included in the check digit calculation

- DRA – Prefix value is alphanumeric and not included in the check digit calculation

- Mod10 – the simplest and most widely used form

- Mod11 – a weighted code

- None: Check digit calculation is not used

Note: Both the Dynix and DRA check digit calculations are based on MOD10 check digit calculations.

Adding a lookup list

You can upload a list of valid barcodes in use at your institution so that ProQuest can validate your users by checking their submitted barcode against the list:

1. Set up a file in txt or csv format on your computer containing a list of barcode values.

2. Click **Add lookup list**.

3. If applicable, select the usage group that the list will apply to, or set up a new one by selecting **New...** from the **Usage Group** drop-down, entering the group name and clicking **Add usage group**.

4. Enter a name for the list.

5. State whether the lookup list will contain barcodes or user IDs and passwords by selecting from the **ID type** drop-down list.

6. Click **Next**.

7. Enter the path and filename of the file you created in step 1. If you want to add more barcodes to a file you created previously, click **Add barcodes**.

8. Click **Upload file**.

Customizing the login page

The Barcode page displays a URL that you can direct your users to that will take them to the barcode login page. The Administrator Module enables you to customize the appearance of that login page by specifying the page title, descriptive text, field labels and button text, and you can also add a branding logo. If you have set up separate usage groups, a URL will be provided for each group.

5.5 Shibboleth

Shibboleth is a federated access management system which enables users to access multiple resources with a single sign-on. Instead of authenticating by user ID, it works using affiliation attributes (for example, whether a user is taking a particular course, or is a member of a particular faculty). This has benefits in terms of data security and user privacy and also in terms of ease of account management.

Organizations that use Shibboleth to access resources must join or create a federation. A federation is a group of institutions and organizations that sign up to an agreed set of policies for exchanging information about users and resources to enable access and use of resources and services.

Once you have joined a federation, you can use the **Add access credentials** page to add the information that will be used to authenticate your users.

If you need more information about Shibboleth, see the **Internet2 Shibboleth website (http://shibboleth.internet2.edu/)**.

5.6 Referring URL Authentication

Referring URL Authentication allows you to control the authentication of your users by placing a link to ProQuest on a secured web page on your own web site. This is a convenient method of authentication, but also potentially insecure. You will need to ensure that only authorized users have access to the referring link, whether that is via IP number/cookie for on-site users, or by barcode or username/password for remote users.

To set up referring URL authentication, please contact ProQuest Customer Services with details of the referring URL you would like to use; users accessing ProQuest from that URL will then be authenticated and allowed access.

5.7 My Research

My Research is a place where users can save, manage, and organize material from ProQuest, including documents, searches, tags, shared lists, search alerts and RSS feeds. To access the full range of My Research features, users will need to set up an account and sign in using a username and password. Please see the My Research help pages for more information on the benefits of this feature.

You can use the Administrator Module to disable/enable the ability to log-in using My Research credentials as required.

5.7.1 My Research Administration (professional interface only)

Adding a My Research Administrator

You can set up individual users who already have My Research accounts with My Research Administrator status.

To add a My Research Administrator:

- Enter the My Research username of the person to whom you wish to assign administrator status.
- Click **Add**.

Users who have been set up as administrators and sign in to My Research will see link to the Administration page at the upper right corner of pages in the main ProQuest interface, beneath the My Research link.

From the Administration page, click the **My Research Accounts** tab to go to a page where you can quickly create one or more My Research accounts on behalf of users. Click the **My Research Workgroups** tab to go to a page that enables you to apply settings and restrictions to particular accounts.

Setting up user accounts

5.7.1.1 To set up a single user account:

- Click **Create a single user account**. The **Create a My Research account** popup will open.
- Enter the required information.
- Click the checkbox below the **Email address** field if you want to email the user with the account information you have specified for them.
- You can add the user to the default workgroup, or to any workgroup you have created, by selecting from the drop-list.

5.7.1.2 To create many accounts at the same time:

If you need to create more than one account, you can upload a comma separated values (CSV) file with the details of all your users. The first line of a CSV file commonly shows values for the column headers that will display in the table on the **Administration** page.

- Click **Import a list of users**. A link to download a sample CSV file is available on the **Import Users** popup if you need it.
- Enter the location of your CSV file.
- Click **Import Users**. ProQuest will create all the accounts automatically, generating a username and password for each user.

Workgroups

You can set up workgroups for particular users and control what users in that workgroup have access to in the main ProQuest interface. For example, you could set up a separate workgroup for medical researchers who only want to search particular databases, or you can restrict access to costly transactional databases, or set particular interface settings.

5.7.1.3 To set up a new workgroup:

- On the **My Research Workgroups** tab, click **Create a new workgroup**.

- Type a name for your workgroup.

- If you want your users to have access to the autocomplete feature when they use ProQuest, leave the checkbox ticked. ProQuest will then predict the word or phrase that the user wants to type in without the user actually typing it in to the search box completely.

- If you want to enable synonym, plural and variant spelling searching, leave the checkbox ticked. This means a search for, for example, **dog** will also retrieve **dogs** and **canine**.

- Choose the databases you want your users to have access to by ticking/unticking the checkboxes next to each title.

- Click **Save**.

You can assign individual My Research usernames to a workgroup when you set up their accounts. Alternatively, if you have set up several accounts, you can assign them all to a particular workgroup by clicking the checkbox(es) next to the relevant usernames in the table on the **My Research Accounts** tab, clicking **Add to workgroup** and then choosing the workgroup you wish to assign them to from the drop-list.

For more information on My Research Administration, please refer to the help pages for the main ProQuest professional interface.

5.8 Manual Login

If your institution has remote users who have no other means of authentication, you can set up usernames and passwords for them to use on the main ProQuest login page.

To set up a manual login, click **Create Manual Login**, enter a username and password and click **Save**. You can also assign users to specific user groups.

You can set up as many logins as you need. Once you have entered them, they will be listed under **Manual Login Details** in alphabetical order. You can edit the login details or delete them once they are no longer needed.

5.9 Additional Authentication Options

The **Additional Authentication Options** page allows you to set up and manage user groups, specify contact details, and specify a redirect option if a user is not automatically logged in.

Usage Group Settings

You can create usage groups for different sets of users (for example, different faculties). You can then assign different authentication methods and interface settings to particular groups as well as enable or disable particular groups. Any changes will only affect the members of that group; this makes it easy to change settings for large numbers of accounts without having to edit each individual User ID.

By default, reports are sorted in ascending alphanumeric order by group name. You can re-sort the list in ascending or descending alphanumeric order by group name or account number by clicking the arrows in the column headings.

Redirect page settings

For users who are accessing ProQuest remotely or via manual login, you can specify the page that they should be redirected to if they are not logged in to their customer account automatically.

You can set the redirect to a barcode login page or manual login page or you can specify a local URL.

Support Contact

You can enable display of custom text and contact details to display on the login page if authentication fails.

6. Title Lists/MARC Records

6.1 Title Lists/MARC Records Introduction

You can create master title lists of the publications available to you via ProQuest, and you can download MARC records for the publications for use in your cataloging systems:

- **Create a Title List (Section 6.2)**
- **Request MARC Records/Set Up MARC Record Delivery (Section 6.3)**

6.2 Create a Title List

You can access and download Title Lists for all the publications available to your institution through ProQuest. Title lists are regularly updated and can be useful for:

- Adding information to your OPAC
- Combining title lists for several databases
- Establishing counts for various formats
- Finding specific titles for which we offer full text
- Creating a database that can be compared against competitors' title lists
- Finding ISSNs and coverage information for titles
- Creating a link that customers can use to view the titles available to them

If you are responsible for administering more than one account, select the account you wish to generate title lists for from the **Accounts** menu at the top of the page.

The **Databases** area enables you to limit the your title lists to those databases your library subscribes to or to provided targeted title lists for particular databases.

The **Report Options** area enables you to specify the fields to include in your title lists, such as ISSNs and coverage information. You can also include information on whether a publication is scholarly/peer-reviewed; scholarly journals are published for an academic audience by a recognized society with academic goals and missions. You can also choose to list only titles with full text available.

Each title in the list will include a durable URL to the publication page for that title within ProQuest.

Output Format

What you will see when you click **Create title list** will depend on the output format you have chosen.

- **Microsoft-Excel.** Use this if you want to view or save a title list in spreadsheet form formatted for use with Microsoft Excel. This format is best if you want to print out your title list.
- **Tab-Delimited.** Tab-Delimited files are widely used, and can be opened by several kinds of applications, including most spreadsheet programs and database tools.
- **Comma-Delimited.** Comma-Delimited files are widely used, and can be opened by several kinds of applications, including most spreadsheet programs and database tools.
- **HTML.** Choose this format if you want to view or save your list as a web page.
- **URL.** Select this format to provide your users with a link to a list of titles that are available to them.

6.3 Request MARC Records/Set Up MARC Record Delivery

MARC Records are machine readable cataloging records that let you quickly and easily update your electronic catalog and provide more useful information to your users.

You can set up a regular delivery of MARC records from the **Set Up MARC Record Delivery** page within the Administrator Module. Once you are set up to receive ProQuest MARC Records, you will receive an email containing a link to download records for all of ProQuest Databases that you are subscribed to.

If you are responsible for administering more than one account, select the account you wish to receive MARC records for from the Accounts menu at the top of the page.

File format settings
You can specify the format in which you wish to receive your MARC record. The following formats are available:

- **MARC21**. This format arose out of the merging of the specifications from the United States and Canadian MARC formats, and was designed to be more accessible to the international community.
- **MARCXML.** This is an XML specification based upon the MARC21 bibliographic format, developed by the U.S. Library of Congress as a means of easy sharing of, and networked access to, bibliographic information, and of working with MARC data in a XML environment.

You can specify the character encoding you wish to use. You can choose between two character sets, either MARC-8 or Unicode encoded as UTF-8. MARC-8 allows the use of Hebrew, Cyrillic, Arabic, Greek, and East Asian scripts. UTF-8 format allows all the languages supported by Unicode. You can also specify the number of records you wish to be included in each file by choosing from the drop-down list.

Proxy server settings (optional)
If your organization uses a URL prefix for its proxy server, enter the Base URL and server type here.

MARC records include bookmarkable durable links, which are subject to cascading authentication, and which do not require you to separately specify IP addresses. If you have specified a base URL in the **Proxy server settings** area, the links will incorporate that base URL. For example:

If you haven't entered a base URL, the link will look like this:
http://proquest.umi.com/pqdweb?RQT=318&pmid=31483&clientId=47684&VType=PQD&VName=PQD&VInst=PROD

If you have entered the base URL http://myownurl.com, the link will look like this:
http://myownurl.com?RQT=318&pmid=31483&clientId=47684&VType=PQD&VName=PQD&VInst=PROD

7. Administrator Settings

7.1 Administrator Settings Introduction

You can create multiple profiles to access the features of the interface. There are two types of profiles:

- Primary Administrator
- Assistant Administrator

Primary Administrator Profile

For most accounts, there is a single primary administrator profile for the Administrator Module account, used by the system administrator. This profile has access to all the features within the Administrator Module interface, including the ability to create assistant profiles.

In some cases, for example in the case of consortia or large organizations with several sub-accounts, an Administrator Module account can manage more than one institutional account. In cases such as these, you can switch accounts using the **Account(s)** drop-down list at the top of the page. The contents of the Administrator Module pages will depend on the account that has been selected. Note that changes to the parent account do not automatically apply to the child accounts.

Assistant Administrator Profiles

The Primary Administrator account has the ability to create and manage Assistant Administrator profiles, which have limited access to the Administrator Module interface. The Primary Administrator selects which areas the profile needs to access (such as usage reports).

For example, you may create an account for a student intern at your library which lets them print usage reports but doesn't give them access to any of the other features.

7.2 Manage Primary Profile

Use this page to set the information for your Primary Local Administrator profile.

You can set contact information to let users contact you with questions or problems while using ProQuest. The contact information will be visible to users if you have remote access enabled and the user authentication fails.

You can also use this page to change your password.

7.3 Manage Assistant Profile

If you are the Primary Administrator, the ProQuest Administrator Module lets you set up and modify user profiles that have limited access to the Administrator Module features. For example, you may create an account for a student intern at your library which lets them print usage reports but doesn't give them access to any of the other features.

To set up an Assistant Profile:

1. Click **Create New Assistant Profile**
2. Enter a description for the profile
3. Enter a password
4. Select the functional areas that the account will have access to
5. Click **Create Profile**

The Administrator Module will generate a username and account based on the preferences you have entered.

You can create as many Assistant Profiles as you need; each profile will be listed on the Manage Assistant Profile page, where you can edit the account information or delete profiles that are no longer needed.

8. Resources

8.1 Index