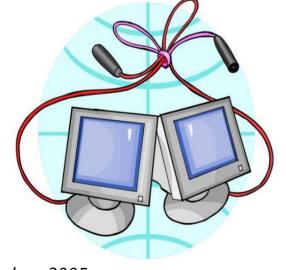
Getting Started with LinkOut



November, 2005

Mark Goldstein NN/LM NER LinkOut Rep

LinkOut Training Modules

- A: BASICS (6 slides)
 - Definition
 - Benefits
 - Process
- B: Setting up LinkOut (53 slides)
 - Steps for Electronic Holdings
 - Steps for Print Holdings
- C: PubMed Interface (20 slides)
 - Localizing PubMed
 - Quick Course My NCBI

What is LinkOut?

- * <u>a software application</u> designed to provide users with links to web-accessible resources (e.g. full text publications, consumer health sites, etc.)
- a feature of NCBI's Entrez database search and retrieval system that handles external linking from PubMed and other Entrez databases.
- * <u>a service</u> that connects PubMed users who are patrons of the library with the e-journal and serial print collections.
- an interface tool that enables patrons to distinguish journal articles available through their library or in free full text from those only available through other publishers or fulltext provider links.

LinkOut is Not...

Common misconceptions:

NOT an application that connects patrons to the "NLM universe."

<u>Rather</u>: LinkOut is a utility application that links users from PubMed (and other Entrez databases) to third party resources.

 NOT a service that provides subscription access to electronic resources.

<u>Rather</u>: LinkOut icons provide access, in accordance with preexisting licensing arrangements.

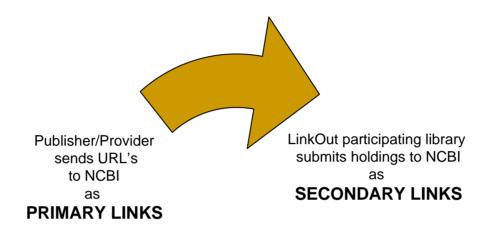
Benefits of LinkOut

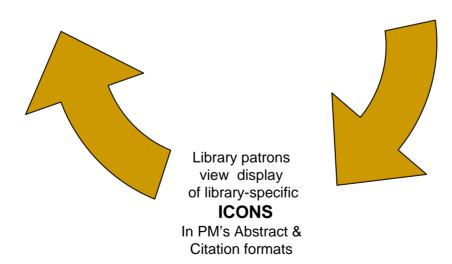
- To link users from PubMed citations to full-text electronic articles in your collection.
- To link users to your library's print holdings through SERHOLD
- To limit PubMed searches to local holdings.
- Library visibly gets a big bounce!



A. Basics

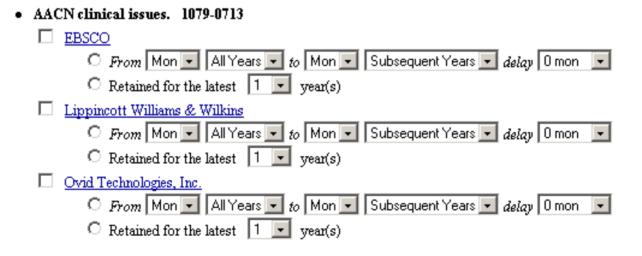
Overall How LinkOut Works





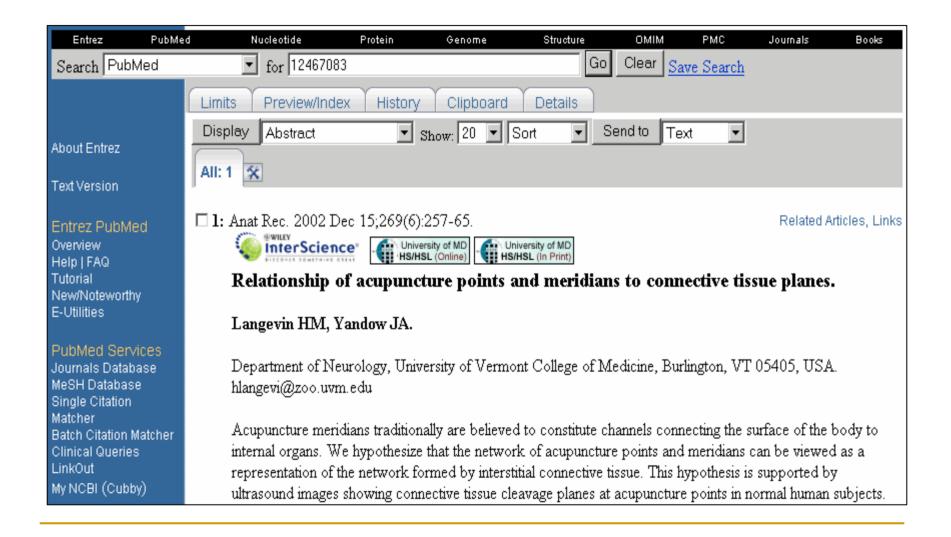
LinkOut for Electronic Journals

- Uses existing ("primary") links created by publishers and aggregators
- Follows your authentication rules
- Holdings information is entered with easy-to-use On/Off ("toggle") interface:



A. Basics

LinkOut in Action: Abstract View



A. Basics Local E-Journal Articles from other libraries **Subscriptions Free Full Text** Outside Tool LinkOut Outside Tool LinkOut **Document Delivery Service** PubMed Local print collection in your library Outside Tool LinkOut

7 Steps to Setting Up E-LinkOut

- 1. Familiarize
- 2. Organize
- 3. Register
- 4. Enter Holdings
- 5. Provide Icon
- 6. Activate
- 7. Publicize

Step 1: Familiarize

Visit These Web Pages

- LinkOut and Library Holdings: www.ncbi.nlm.nih.gov/entrez/linkout/doc/liblinkout.html
- Frequently Asked Questions for LinkOut Libraries:
 <u>www.ncbi.nlm.nih.gov/entrez/linkout/doc/liblofaq.html</u>
- Tutorial: Setting Up LinkOut for Libraries: www.ncbi.nlm.nih.gov/entrez/linkout/doc/linktutorial.html

For More Information...

- NN/LM Library LinkOut Survival Guide nnlm.gov/libinfo/ejournals/linkout
- NCBI LinkOut Overview Page
 ncbi.nlm.nih.gov/entrez/linkout/doc/lkoverview.html

Step 2: Organize

Things to Do Beforehand

- Discuss LinkOut program with library staff
- Assign primary contact for LinkOut program maintenance (indicate this contact under "People" in your DOCLINE Institution Record)
- Compile a list of vendor or publisher names with titles and years supplied
- Analyze e-journal subscription agreements and holdings
- Contact providers to join or add holdings

Outstanding Issues

Resolve outstanding questions through your

NER LinkOut representative - Mark Goldstein:

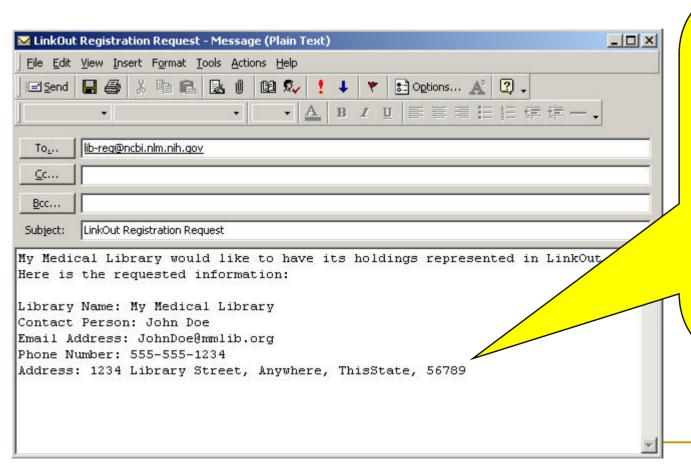
mark.goldstein@umassmed.edu 1-508-856-5964

-or-

Email NCBI: <u>lib-linkout@ncbi.nlm.nih.gov</u>

Step 3: Register

Send e-mail to lib-reg@ncbi.nlm.nih.gov



Please use this format:

Subject: LinkOut Registration Request

Library Name:
Contact Person:
Email address:
Phone Number:
Address:

NCBI Sends User Name, Pwd

- Within a week, LinkOut will send you an email containing a username and password, for example:
 - User Name: xxxxxlib
 - Password: Br76D
- The User Name is used in two ways:
 - To access LinkOut in Submission utility
 - To identify your library in PubMed searches by activating your icon

Registering Reminders

- 1. User names and passwords are case-sensitive.
- 2. User names are usually different from DOCLINE LIBID's LinkOut user names assist in attaching SERHOLD information to LinkOut.

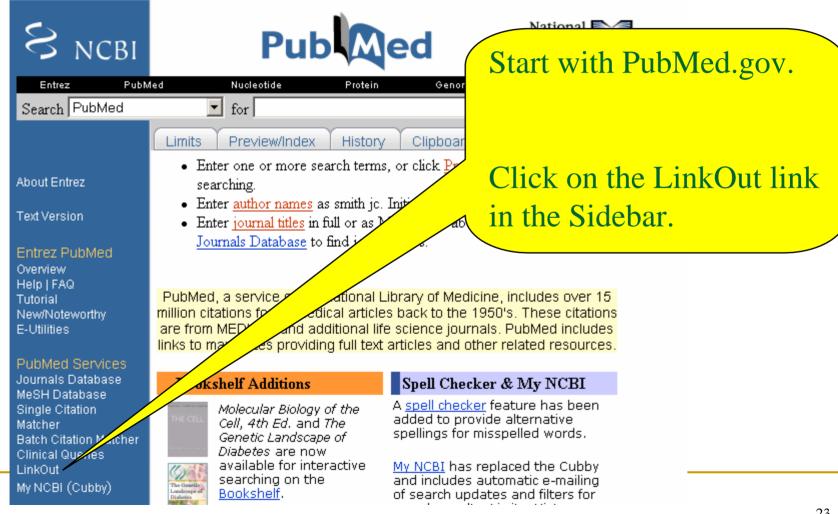
Step 4: Enter Holdings

Edit Your Record

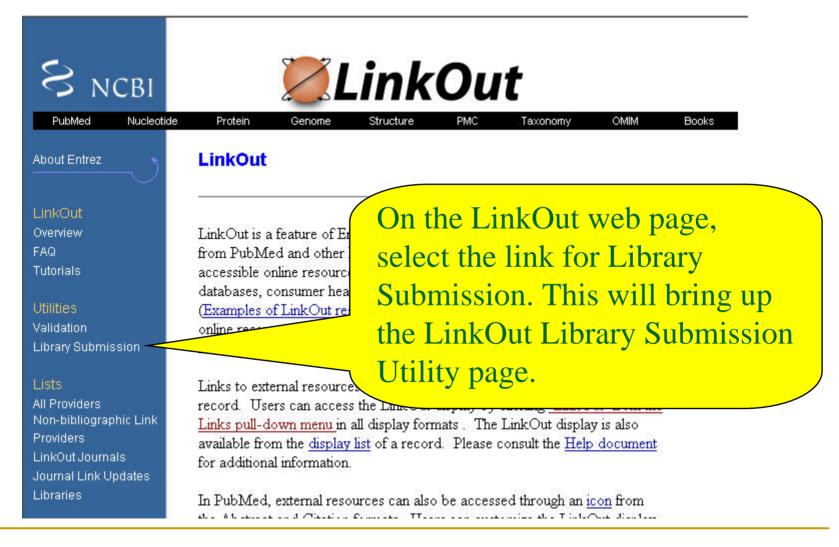
With your user name and password, sign in to the Submission Utility and check:

- Library Name
- Library/Organization Public Web Site URL
- LinkOut Contact Person's name and e-mail at your library

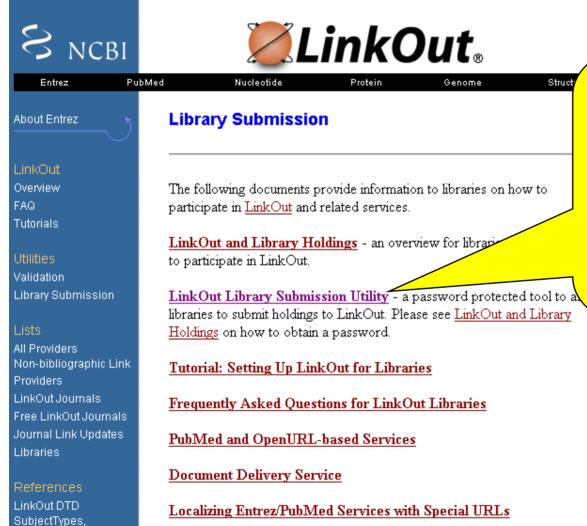
Using the Submission Utility



Using the Submission Utility

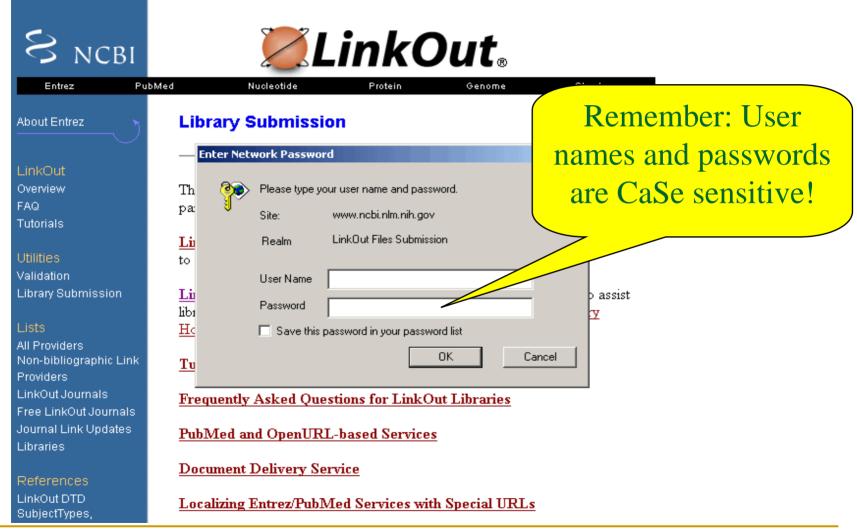


Using the Submission Utility

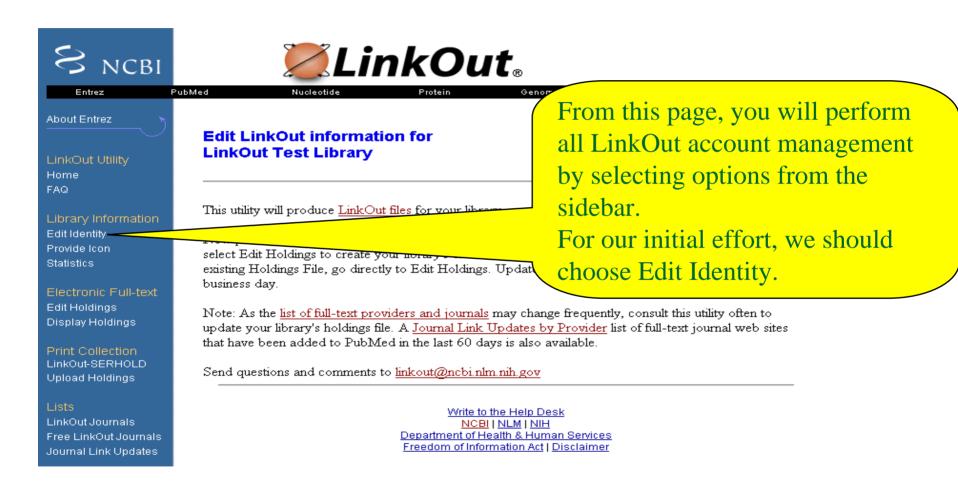


Click on LinkOut
Library Submission
Utility to sign in. You
will be prompted for
your user name and
password

<u>Using</u> the Submission Utility



Using the Submission Utility



Using the Submission Utility: Edit Library Identity



Library Identity Information

Some of the information entered into your Library Identity files is publicly available at this list of LinkOut Libraries:

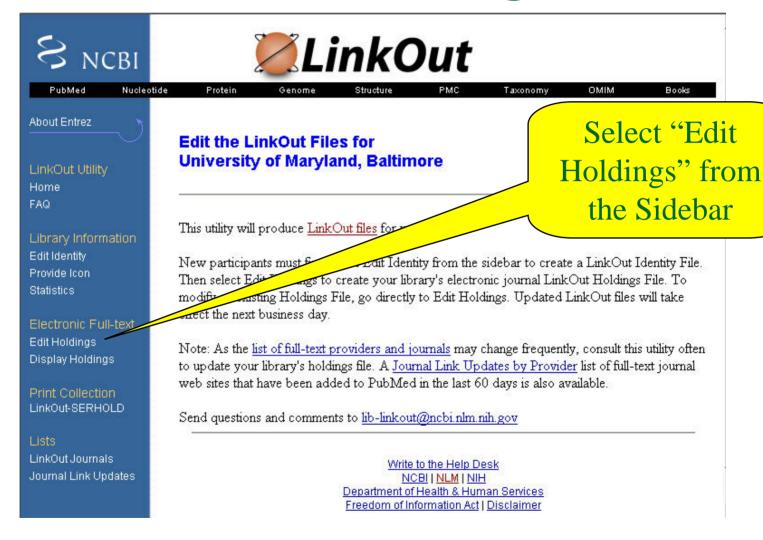
www.ncbi.nlm.nih.gov/entrez/journals/active_libraries.html

The "Contact Person" information is not publicly available

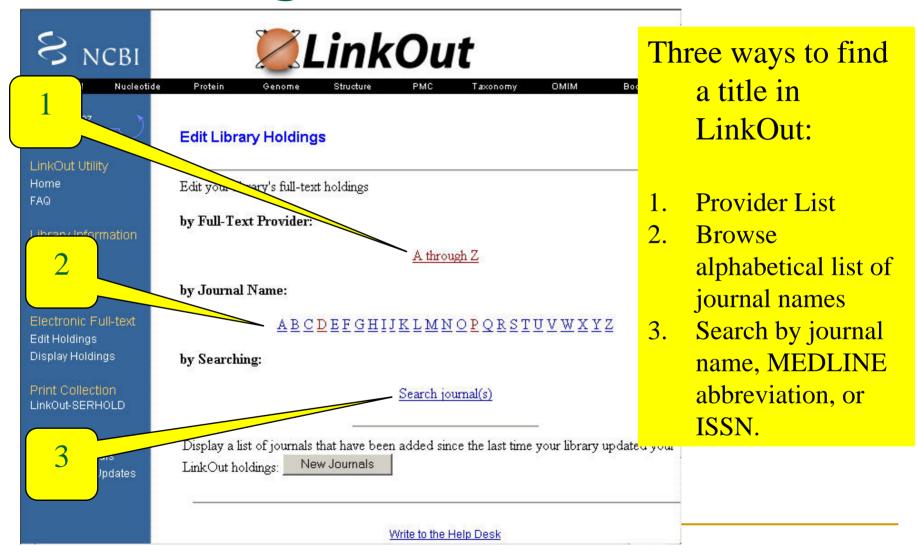
Turning on e-Journal Links

- Have list of journal titles, years, and providers available
- Login to the Library Submission Utility
- Select Edit Holdings on the Sidebar (under Electronic Full-text)
- This will bring you to the Library Holdings page

Edit Holdings



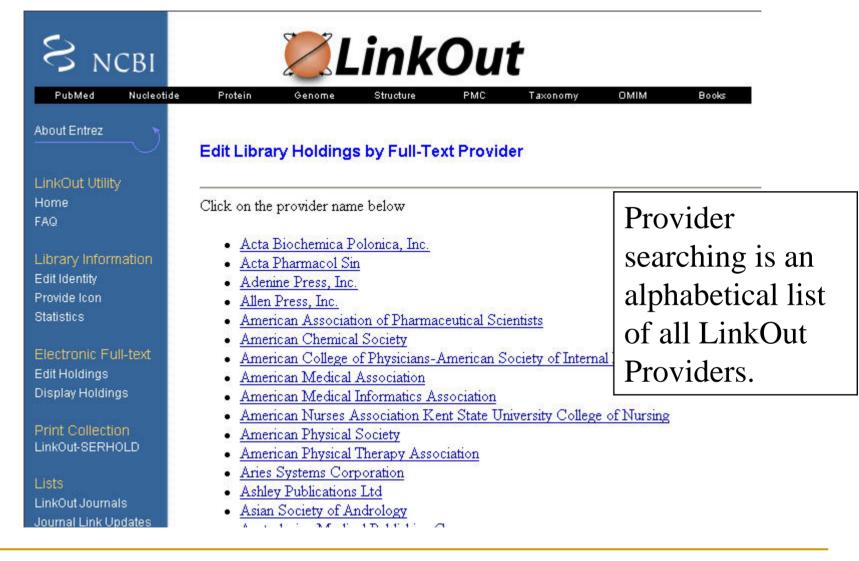
Finding a Journal Title: 3



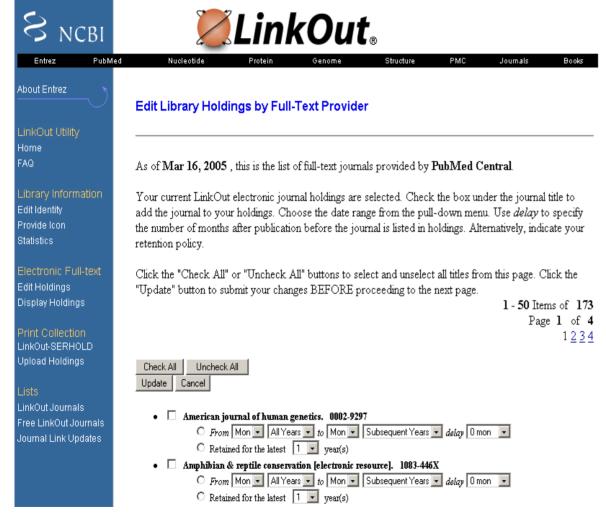
Search by Provider

- Provider searching is, perhaps, the quickest and most convenient way to turn on links
- All titles (up to 50) for a given provider may be turned with two clicks.

Adding By Provider



Adding a Provider's Titles



Clicking on a provider's name brings up a list of titles with check boxes for selection and drop down boxes for date manipulation.

Don't forget to click the Update button before leaving a page!

Selecting Titles

LinkOut Utility

Home FAQ

Edit Identity Provide Icon Statistics

Electronic Full-text

Edit Holdinas Display Holdings

Print Collection LinkOut-SERHOLD

Upload Holdings

Lists

LinkOut Journals Free LinkOut Journals Journal Link Updates

As of Mar 16, 2005, this is the list of full-text journals provided by PubMed Central.

Your current LinkOut electronic journal holdings are selected. Check the box under the journal title to add the journal to your holdings. Choose the date range from the pull-down menu. Use delay to specify the number of months after publication before the journal is listed in holdings. Alternatively, indicate your retention policy.

Click the "Check All" or "Uncheck All" buttons to select and unselect all titles from this page. Click the "Update" button to submit your changes BEFORE proceeding to the next page.

> 1 - 50 Items of 173 Page 1 of 4 1234

✓ American journal of human genetics. 0002-9297

Uncheck All

Check All Update

- O From Mon ▼ All Years ▼ to Mon ▼ Subsequent Years ▼ delay 0 mon ▼
- C Retained for the latest 1 vear(s)
- 🔲 Amphibian & reptile conservation [electronic resource]. 1083-446X
 - O From Mon ▼ All Years ▼ to Mon ▼ Subsequent Years ▼ delay 0 mon ▼ C Retained for the latest 1 vear(s)
- Annals of clinical microbiology and antimicrobials [electronic resource].
 - O From Mon ▼ All Years ▼ to Mon ▼ Subsequent Years ▼ delay 0 mon ▼ C Retained for the latest 1 vear(s)
- Annals of general hospital psychiatry [electronic resource].
 - O From Mon ▼ All Years ▼ to Mon ▼ Subsequent Years ▼ delay 0 mon ▼
 - C Retained for the latest 1 vear(s)

Click on the checkbox to add a journal title.

Use drop-down menus to select years held.

Use the delay drop down to account for embargoes.

Don't forget: **Update!**

Tips For E-Journal Links

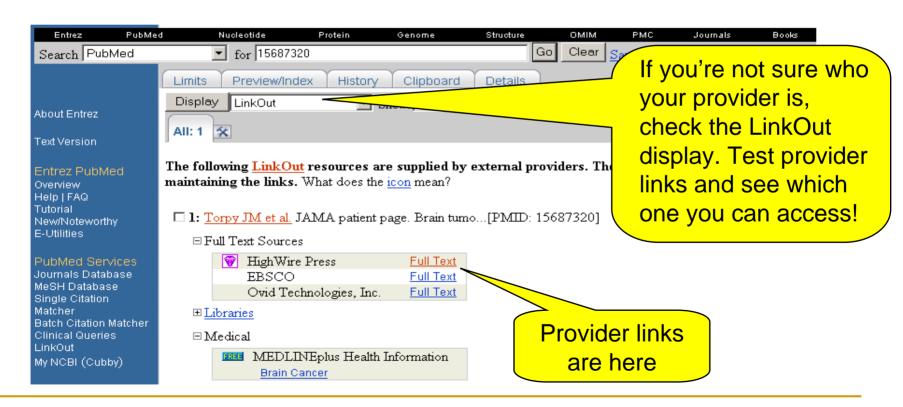
- If you subscribe to the entire run of an electronic title, there is no need to use the date drop-downs
- Changes made in the Submission Utility show up in PubMed <u>after 2 PM ET the next business day</u>
- Holdings may be entered in multiple sessions
- If you don't have a subscription, don't add the journal!
- There's a special URL that will automatically apply your icon to all citations with free full-text links.

Look Out for These Problems

- If you have electronic full-text access through your subscriptions, you will need to activate access before adding titles to LinkOut
- We recommend adding only those journals that validate IP addresses -or- are accessible through your proxy server; otherwise, you will need to give out your passwords
- If you have more than one person adding holdings, assign them different letters or parts of the alphabet, so they don't overwrite each other's changes.

Look Out for These Problems

- Sometimes the provider is not obvious
- Sometimes one journal has multiple providers



Step 5: Provide an Icon

Create Icons For PubMed













- Create icon(s) to represent your library:
- Follow these design parameters:
 - Recommended size: 100x25 pixels (150x35 max)
 - Should look like a button
 - Should have an outline
 - Not have a white or transparent background.
 - Readable and easily recognized
 - gif, jpg, or png

Store Your Icon Somewhere

You have three choices for providing and

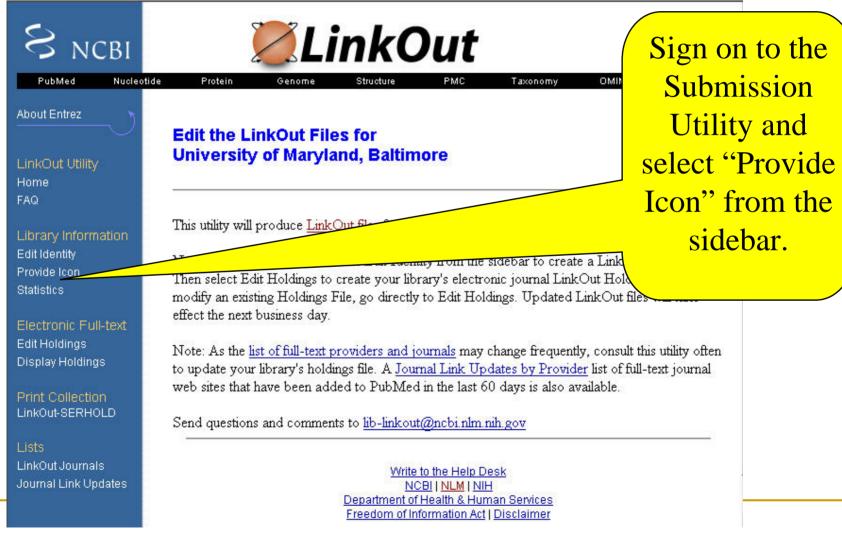
storing an icon:

- Self-Hosting: store your icons in a web-accessible directory, outside any firewalls on your own server.
- 2. Hosted by NCBI: If you cannot host your icon(s) on your own web server, NCBI will host it/them for you.
- 3. If you do not create icons, PubMed generates defaults:

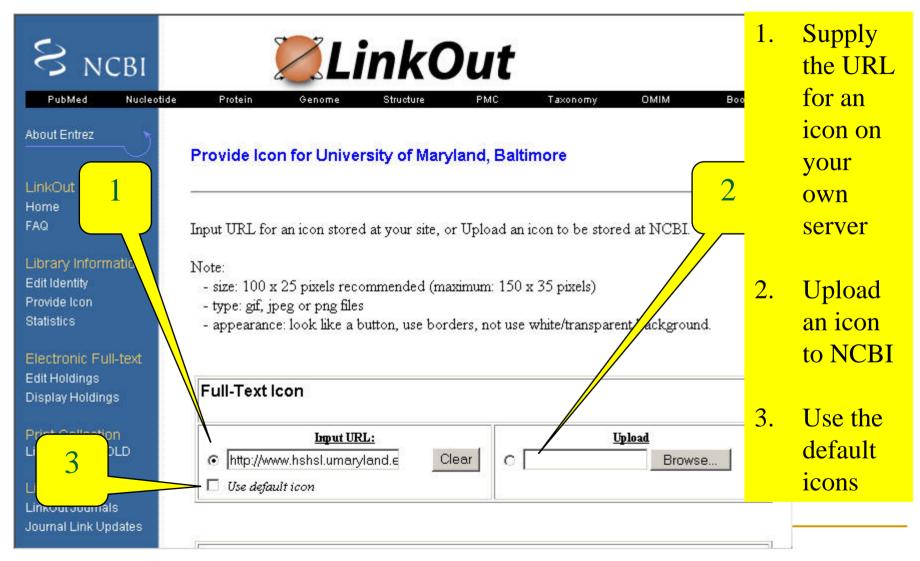
 Online Full-text

 Local Print Collection

Using the Submission Utility: Provide an Icon



Providing an Icon: 3 Choices



Tips on Creating Icons

- Your marketing department or IT staff may be able to help you
- Your icon may be your institution's logo or a statement such as "Full-text provided by My Medical Library" or "My Medical Library Print Collection"
- Icons should identify your institution

Tips on Creating Icons

- Create two icons: one for your print collection (SERHOLD), one for your electronic collection
- Use unambiguous terms on your icons; many people think that an icon with the word "Print" on it refers to an action.

Step 6: Activate

- When you UPDATE input of holdings, the Submission Utility will record changes in NCBI's LinkOut database.
- Your library icons will be available in PubMed the next business day after you update your files.
- Your library icon will display on the Abstract and Citation display for those citations that were entered in the Submission Utility session.

Two Ways to Activate Icons

A link on your library website

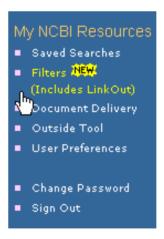
Reference

PubMed/MEDLINE

Journals

<u>Databases</u>

Through My NCBI



Activating from Library Website

- Default link to PubMed
- Uses a special URL:
 www.ncbi.nlm.nih.gov/entrez/query.fcgi?holding=x+lib
 - where "x"+lib is the LinkOut user name assigned to your library

Activating through My NCBI

- User signs in to My NCBI and selects LinkOut provider(s) as Filters.
- Provider's icons will display in search result and provider's holdings will display as a Filter tab.
- Works only if user is signed into My NCBI.

Step 7: Publicize

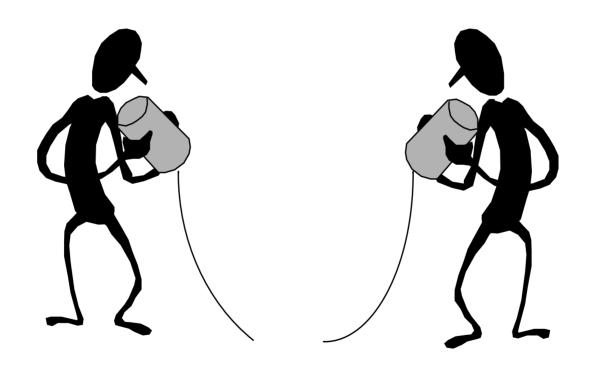
- Let your patrons know about LinkOut Handouts, bookmarks, classes, etc.
- Provide a <u>link</u> to your special URL on your library website.
- Bookmark your special URL on your library computers
- Share your LinkOut Statistics, which are automatically collected by the system, with your administrators

Seven Steps Review

- 1. Familiarize read about the program
- 2. Organize review e-journal subscriptions
- 3. Register sign up with NLM
- 4. Enter Holdings input library holdings
- 5. Provide an icon create and store library icon
- 6. Activate display your journal holdings
- 7. Publicize let patrons know collection

Questions & Answers -

Setting up LinkOut for e-Journals



Print Holdings

 LinkOut-SERHOLD is available for US and Canadian libraries only

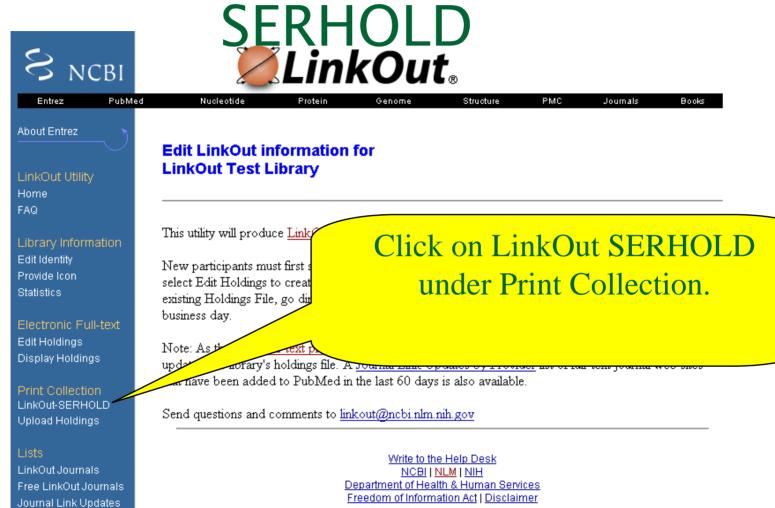
Non-SERHOLD libraries can upload their print holdings to LinkOut in a text file. See "LinkOut and Library Holdings" or the Advanced section of the on-line Tutorial for information.

Print Holdings Display: What You Need

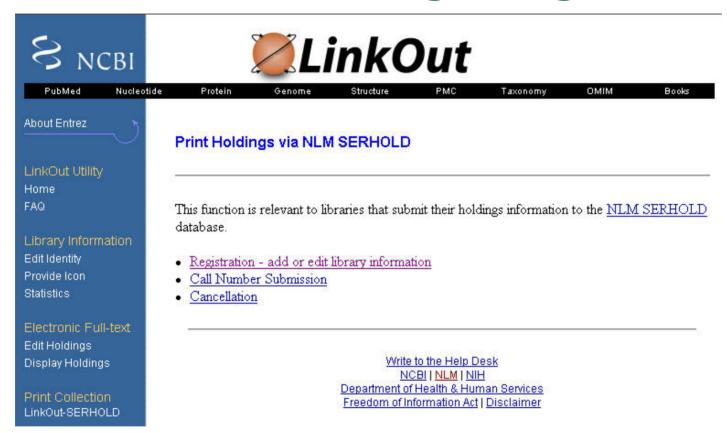
You will need to know the following:

- DOCLINE LIBID
- Physical location for the print collection:
 - Journal Stacks
 - Current Year (Unbound): First Floor, Main Branch Reading Room. Previous Years (Bound): Fourth Floor Open Stacks, Main Branch.
 - This can be up to 255 characters long
- URL for your library catalog (optional). If your URL is included, this link will display with your print holdings

Print Holdings via SERHOLD



Print Holdings Page



From this page, you may register for or turn off Print Holdings Display or submit a call number file for classified journals

Registration

Print Holdings v	ia NLM SERHOLD	- Registration
------------------	----------------	----------------

Our library would like to present our print holdings information from the <u>NLM</u> SERHOLD database in LinkOut.

How many LIBIDs(6 character) do you have?

Number of LibId*:	Submit
Number of LibId*:	Submit

The first time you click on "Registration—add or edit library information," you will be asked to enter the number of library ids you will be entering. If you have only one library registered in DOCLINE, enter "1"

Registration - Print

Print Holdings via NLM SERHOLD - Registration

Our library would like to present our print holdings information from the <u>NLM SERHOLD</u> database in LinkOut.

LIBID*:
Location of the print collection (255 characters maximum):
LIBID*:
Location of the print collection (255 characters maximum):
URL for the print collection icon: After clicking Update below, use Provide Icon function on the left sidebar to enter information for your print collection icon
Library catalog URL (optional)
Update Cancel

For each
LIBID enter
the ID and
physical
location of
the print
collection

Enter Library Catalog URL (optional)

LinkOut for Print Journals

Print holdings are loaded from SERHOLD.

Non-SERHOLD libraries can upload a text file.

University of Maryland, Baltimore

Dorman T

Intensivists: Providing primary care for critically ill patients.

Crit Care Med 2005 Feb; 33(2): 446-7

PMID:15699853

The article cited above is available in the Print Collection of University of Maryland, Baltimore.

Journal Name: Critical care medicine

Library Holdings Volume (Year)	5- (1977-)
Location	Journal Collection

Go to the Library Catalog of University of Maryland, Baltimore.

LinkOut for Print Journals

University of Maryland, Baltimore

Langevin HM

Relationship of acupuncture points and meridians to connective tissue planes.

Anat Rec 2002 Dec 15; 269(6): 257-65

PMID:12467083

The article cited above is available in the Print Collection of University of Maryland, Baltimore.

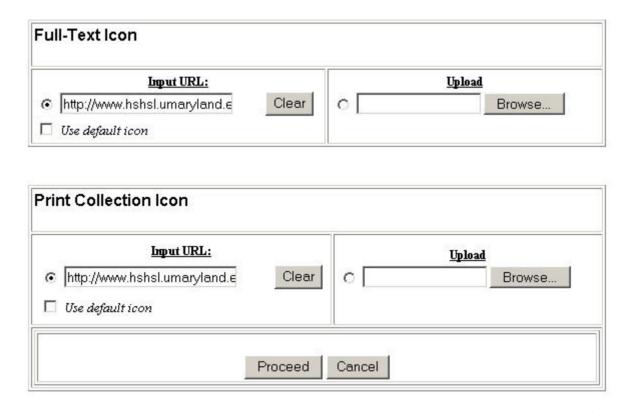
Journal Name: The Anatomical record

Library Holdings Volume (Year)	1-250,252-269 (1906-1997,1999-2002)
Location	Journal Collection

Go to the Library Catalog of University of Maryland, Baltimore.

Please consult a librarian in your library for additional assistance.

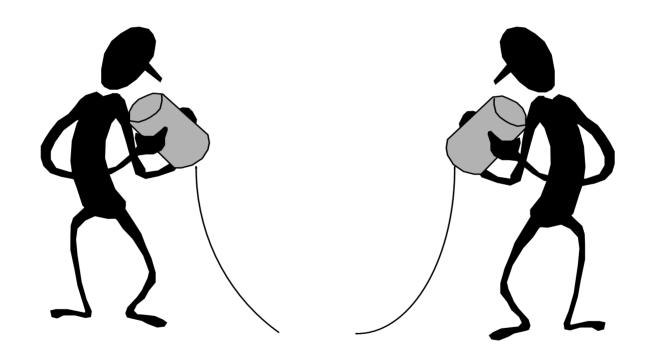
Providing an Icon for Print



The same three choices apply for the Print Collection Icon.

Questions & Answers -

Setting up LinkOut for Print Journals



Localizing PubMed

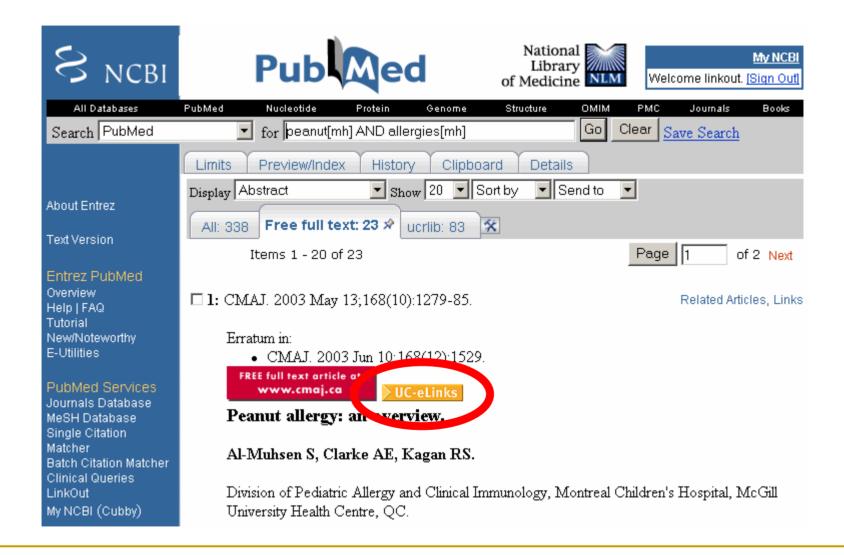
- Connecting users to local library services directly from PubMed "localizes" the PubMed display.
- Combine linking features to localize PubMed for your users:
 - LinkOut
 - Document Delivery Service
 - Outside Tool

Point to Local Resources

 Document Delivery Service – order articles directly from a local document delivery service.

 Outside Tool – a link on every PubMed record. Used to access full-text through a local service.

Outside Tool



C. PM Interface

UC-eLinks

Close this Window

More

Title Perforation of metastatic melanoma to the small bowel with simultaneous gastrointestinal stromal tumor.

Source World journal of gastroenterology [1007-9327] Brummel, N yr: 2005 vol: 11 iss: 17 pq: 2687

You are not recognized as a valid UC user.

Use your campus proxy/VPN service to get access to UC licensed databases and full text from off-campus and try your search again. Learn more

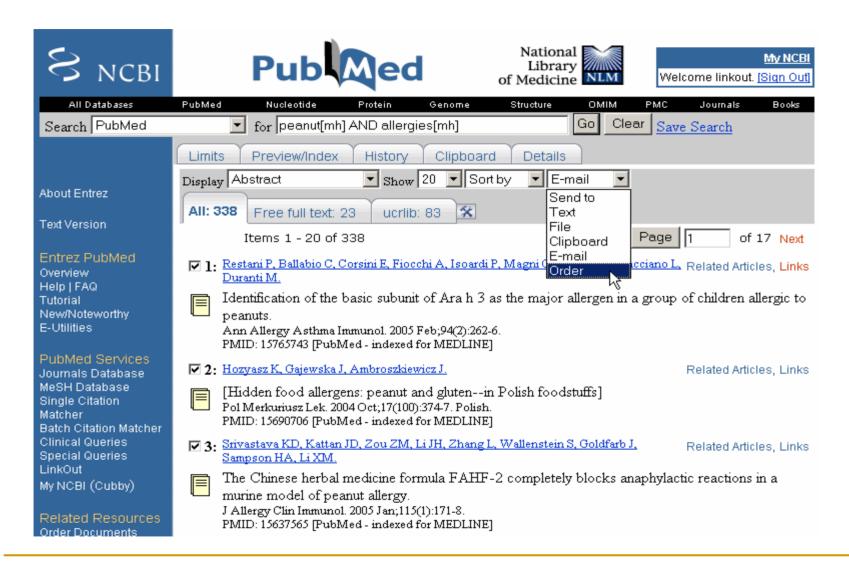
Full text available from Directory of Open Access Journals

year: 2005 volume: 11 issue: 17 start page: 2687

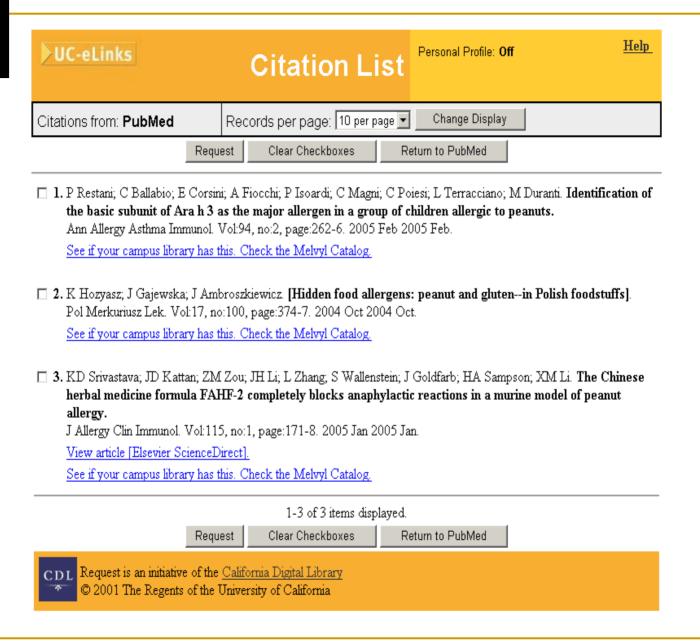
Most articles available for free.

- See if a UC campus has this. Select Details/Locations on MELVYL
- For Interlibrary Loan or Document Delivery use Request
- Need Help? Ask a Librarian
- Report problems with UC-eLinks

Document Delivery Service



C. PM Interface



A Quick Course on My NCBI

Select My NCBI from the PubMed® screen.

Sign in to My NCBI, or register for My NCBI, then sign in.

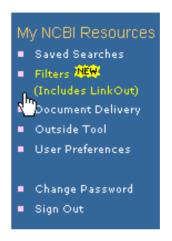


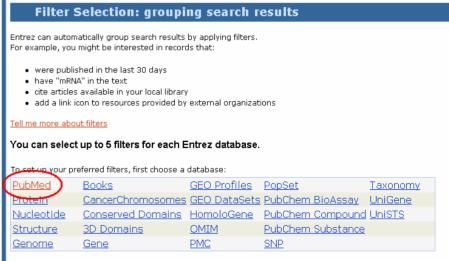


My NCBI

Select Filters
from the My
NCBI menu.

Select PubMed from the database list.





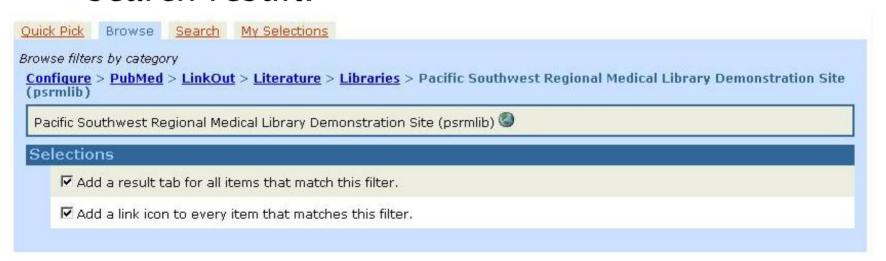
My NCBI

- This will bring you to Filters Quick Pick list
 - Click the "Search" tab.
 - Enter your institution's name in the search box. Click "Go".
 - Select your library from the list of Matching Filters.



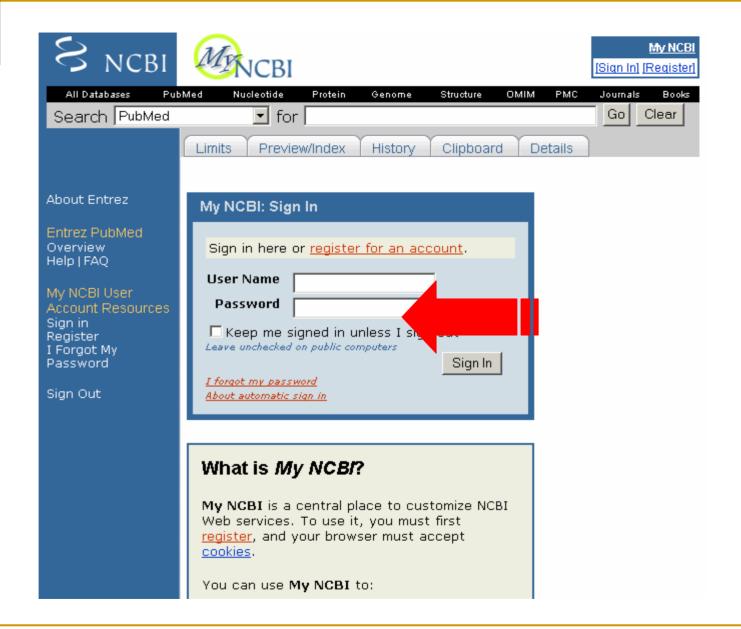
My NCBI

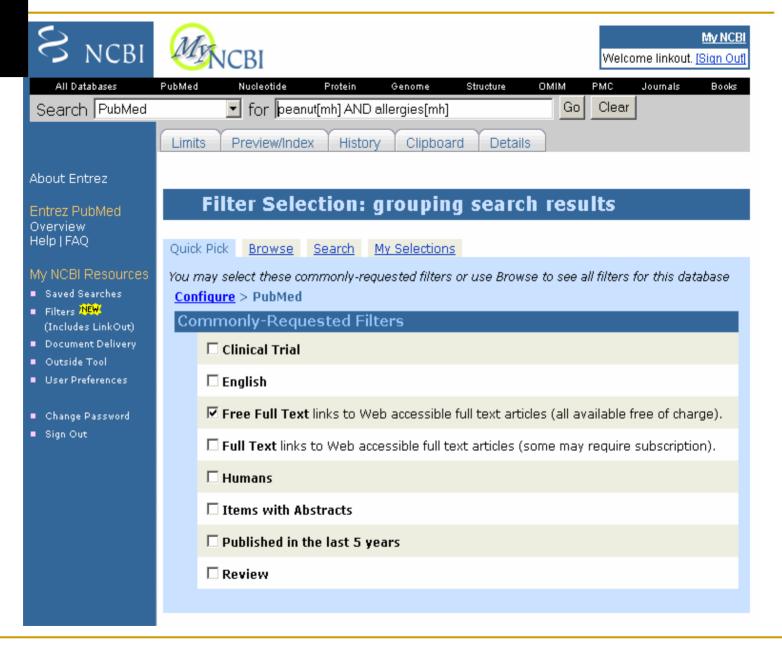
- Make sure both checkboxes under Selections are checked.
 - Library icons will display on holdings.
 - Holdings will be grouped as a Filter tab in the search result.



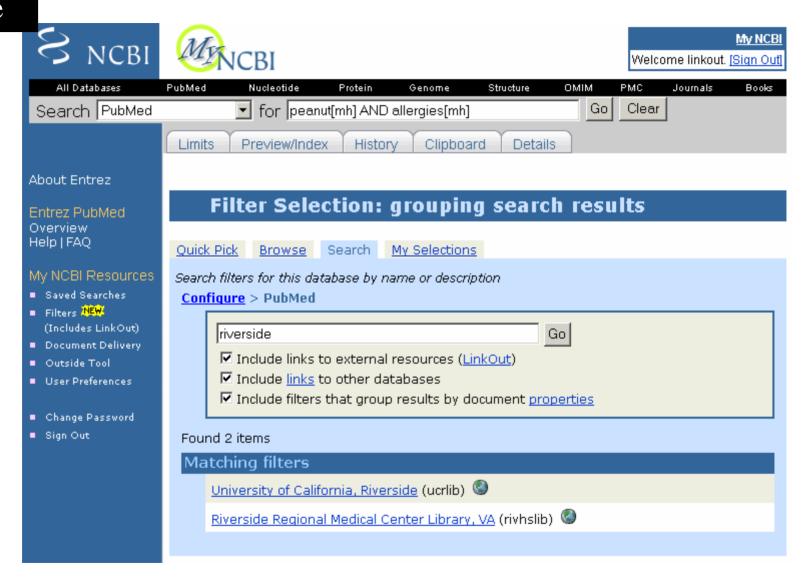
My NCBI

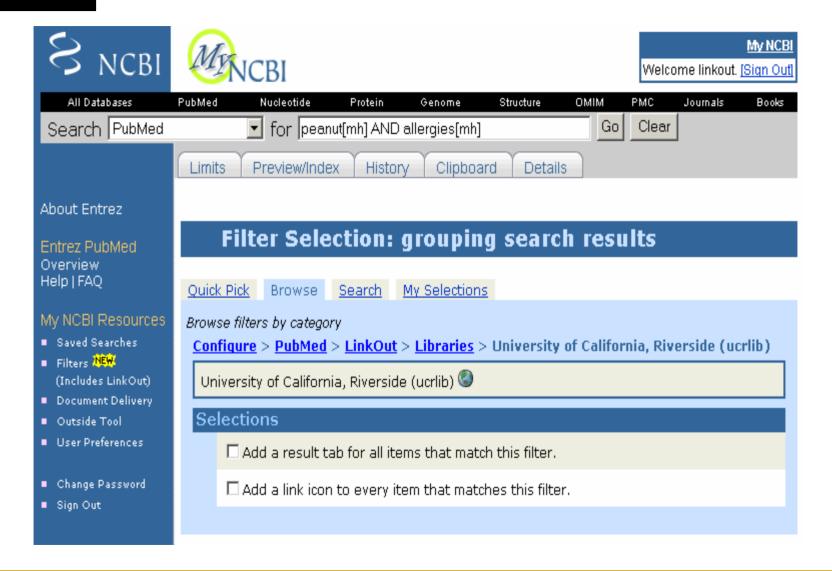
- View Filter selections under "My Selections"
- My NCBI filters will only work when user is signed into My NCBI.
- From the Quick Pick list, you can click "Browse" to select from a list of libraries that participate in LinkOut.
- Options set using special URLs will be applied while user is in My NCBI.

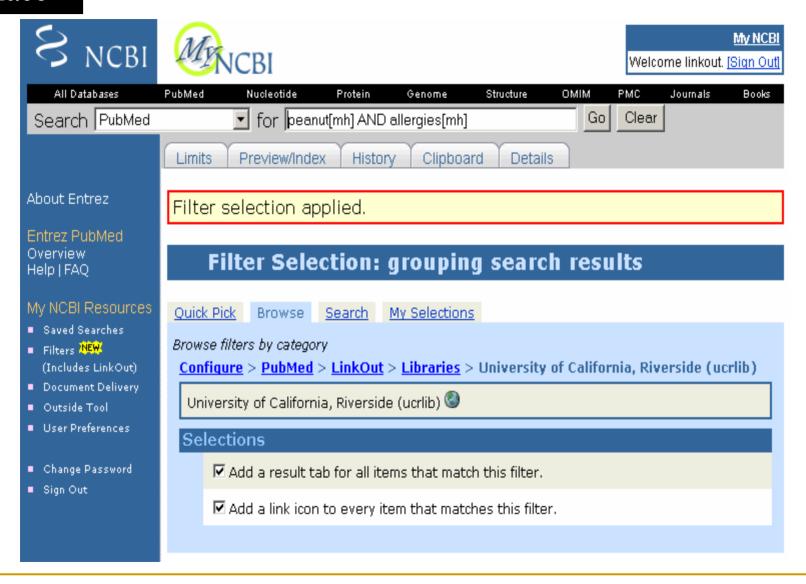


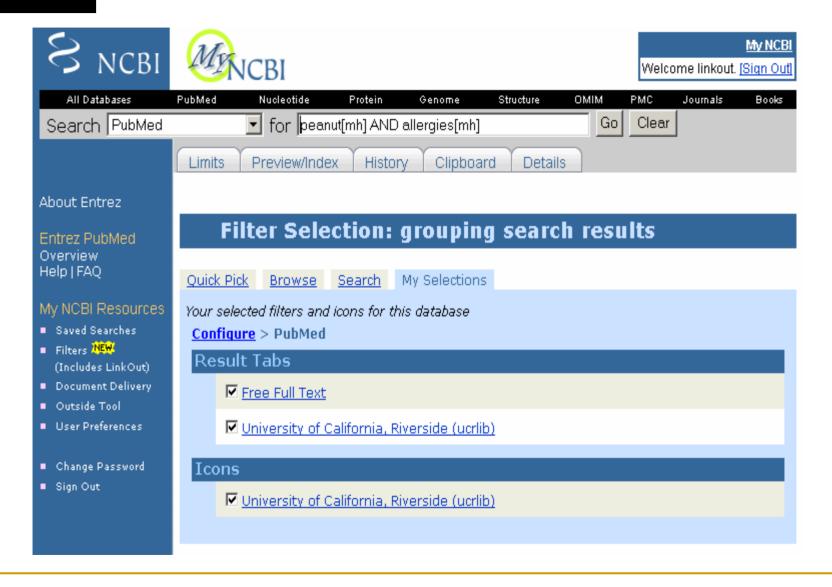












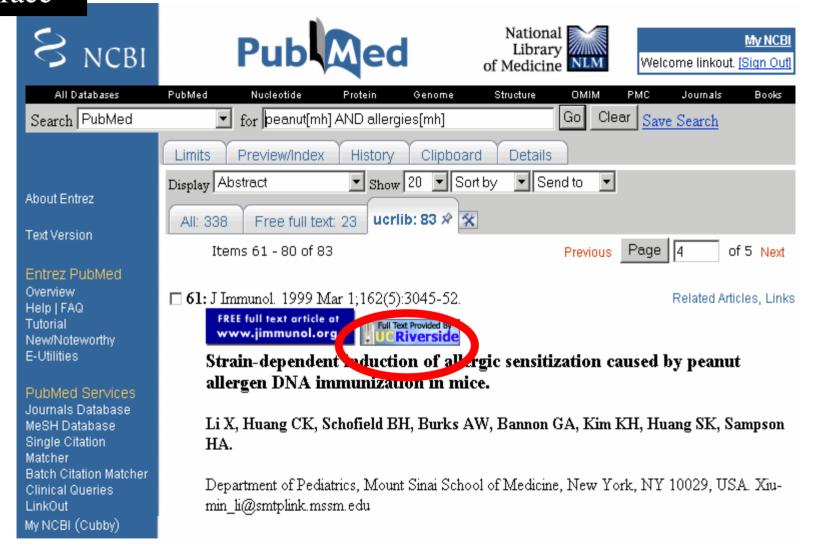






My NCBI Welcome linkout. [Sign Out]





Questions & Answers

- PM Interface

