

# Local Administrator (LAD) Training Guide

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## Objectives:

After finishing this training guide, you will be able to:

- Navigate through the LAD interface
- Create an on-demand or scheduled usage report
- Customize your account preferences
- View a Title List
- Save a shortcut to a Title List for your patrons
- Upload your holdings to ProQuest
- Create a CrossLink

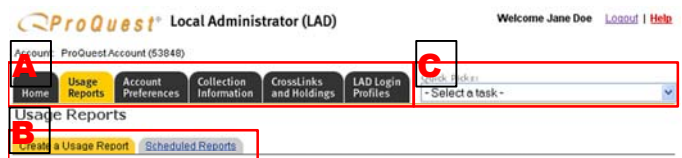
## What is Local Administrator (LAD)?

The Local Administrator (LAD) is ProQuest's easy-to-use online administrative tool that lets administrators customize their organization's interface.

Using LAD, you can:

- Set up the default search options for your users, including selecting the databases to search, which options are available on the screen, and the interface language.
- Create multiple login URLs, customized for how different user groups search within ProQuest.
- Connect ProQuest to your online library catalog, ejournals, link resolver, or other collections you subscribe to.
- View usage statistics for your account.
- View title lists for different collections. You can even share these with your users.

## LAD Navigation



The LAD interface uses two levels of tabs.

### Primary Tabs

The primary tabs (A) let you select the type of task you want to perform:

- **Home**  
This tab displays a quick-choice list of the most common tasks for each tab. Click on the task to go directly to the page you want.
- **Usage Reports**  
Use this tab to create or view usage reports, which let you see how your account is used.
- **Account Preferences**  
Use this tab to set the default search mode for your ProQuest interface. You can set branding options by adding special links, text, and logos to your search interface, and create custom login URLs with predefined databases and search preferences.
- **Collection Information**  
Use this tab to download or view a title list for your collections, or create a URL link to a title list on the Web to share with others.  
This tab also lets you setup the delivery of ProQuest MARC records.
- **CrossLinks and Holdings**  
Use this tab to connect your ProQuest account to external resources (link resolvers, ejournals, your library's OPAC, and so on).  
You can also edit, search, and upload your holding information for electronic or physical holdings.
- **LAD Login Profiles**  
Use this tab to manage the contact information users see, and change your Local Administrator password.  
You can also set up Assistant Profiles to permit others to access LAD and limit their access to the functional areas.

### Secondary Tabs

The secondary tabs (B) let you select specific tasks within the group.

### Quick Picks

In addition, the Quick Picks area (C) let you select a specific task and go directly to the correct page.

## Logging In to LAD

To log in to LAD:

- 1 Go to the LAD site at <http://proquest.umi.com/cgi-bin/lad>
- 2 Enter your **Account Name** and **Password**.  
Note: Your Local Administrator ID and Password are different from your ProQuest ID and Password.
- 3 Click **Connect**.



When you first receive your LAD account, your password will be **welcome**. If you are signing in for the first time, or if you haven't yet changed your password, when you sign in you will see the **Primary Local Administrator Profile** page, and will need to change your password.



- 1 In the **Change Password** section, enter the new password in the **New Password** field.
- 2 Reenter the password in the **Confirm New Password** field.
- 3 Click **Save**.

You will be taken to the Local Administrator **Home** page.

## Home



This tab displays a quick-choice list of the most common tasks for each tab. Click on the task to go directly to the page you want.

Or, select a task from the **Quick Picks** drop-down menu.

# Usage Reports

[Home](#)
[Usage Reports](#)
[Account Preferences](#)
[Collection Information](#)
[CrossLinks and Holdings](#)
[LAD Login Profiles](#)

Usage Reports

[Create a Usage Report](#)
[Scheduled Reports](#)

Usage reports 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 methods, and popular 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.

## How to Read Usage Reports

ProQuest usage reports contain valuable data. Here is a quick overview of the different parts of your usage report (note: not all of this data appears on all reports. Yearly comparisons, for example, are only available on annual reports):

## A Database Activity - Annual Report

B Time Frame - Nov 2003 to Oct 2004				
C Client Client - Test Account for Client				
D Searches	E Database	F Cit/Abstract	G Any FT Format	H Total
14709	ABI/INFORM Archive I	0		
14700	ABI/INFORM Global	398	2282	2680
625	APS Online	12	299	311
12370	Alt-Press Watch (APW)	5	73	78
14860	American Medical Association	62	0	62
14698	CBCA Business	9	21	30
14697	CBCA Current Events	22	43	65
14738	CBCA Education	7	16	23
14720	CBCA Reference	30	98	128
123	CINAHL® - Database of Nursing and Allied Health Literature	12	619	631
12428	Ethnic NewsWatch (ENW)	4	132	136
12345	Ethnic NewsWatch and ENW: A History (ENW+H)	1	53	54
12385	GenderWatch (GW)	2	73	75
136	MEDLINE®	7	78	85
14675	MarketResearch.com Academic	1	0	1
14906	ProQuest Nursing Journals	19	327	346
27	PsycINFO®	0	6	6
14815	Reference	0	4	4
14917	Research Library	697	3699	4396
<b>12948</b>	<b>Canadian Newsstand</b>	<b>28</b>	<b>768</b>	<b>796</b>
14712	Canadian Newsstand Complete	28	768	796
<b>13899</b>	<b>ProQuest Newspapers</b>	<b>238</b>	<b>2346</b>	<b>2584</b>
15518	Chicago Tribune	13	268	281
14555	Christian Science Monitor	0	0	0
14556	Hartford Courant	0	84	84
15541	Los Angeles Times	13	311	324
15567	National Newspapers (27)	196	1661	1857
14740	New York Times	16	16	32
229	ProQuest Newsstand	0	3	3
14593	Washington Post	0	3	3
<b>332885</b>	<b>Grand Total</b>	<b>1554</b>	<b>10944</b>	<b>12498</b>
<b>J 6954</b>	<b>Previous Year</b>	<b>247</b>	<b>1342</b>	<b>1589</b>
<b>K 609%</b>	<b>% Increase</b>	<b>529%</b>	<b>715%</b>	<b>687%</b>
<b>L 17283</b>	<b>Total Unique Searches (Search Button Pressed)</b>			

- A** The Report Name.
- B** The Time frame
- C** The client ID and Name
- D** This column displays the number of searches for each database.
- E** The name of the database being searched.
- F** The number of articles retrieved from those searches in Citation or Abstract format.
- G** The number of articles retrieved from those searches in Full Text formats.
- H** The total number of articles retrieved from those searches.
- I** **Grand Total**  
The total number of searches performed in all databases. This is **not** the same as the number of times **Search** was clicked. (For this information, see **Total Unique Searches** below.) This is because when a user is searching multiple databases and clicks Search, the number of searches for **each** database is incremented by one. The Grand Total is therefore incremented by the number of databases being searched.  
For example, a user is searching ABI/INFORM Archive I and ABI/INFORM Global. Each time the user clicks Search the number of ABI/INFORM Archive I searches is incremented by 1, the number of ABI/INFORM Global searches is incremented by 1, and the Grand Total will be incremented by 2.
- J** **Previous Year**  
The totals from the same period in the previous year. (This is only available on the Database Activity - Annual Report.
- K** **% Increase/Decrease**  
The percent change from the same period last year.
- L** **Total Unique Searches**  
The total number of unique searches. This compensates for the inflated numbers in the Grand Total and shows the number of times the search button was pressed.

## **Specific Usage Reports**

Here is a description of each of the different usage reports available to you.

### **Database Activity – Summary Report**

The Database Activity – Summary Report gives you an overview of activity for the databases to which you subscribe, for the period of time you specify.

The report shows:

- The total number of searches in each database, broken down by location.
- The number of articles retrieved from each search, broken down by the format provided (Citation / Abstract, Any full text Format).
- The number of unique searches.

If you display a report for a grouped site (such as a consortium), you will see a summary section that totals all usage for the entire consortium (the master client). You can also select to view a detailed section that displays the usage for each of the individual clients (the child clients).

### **Database Activity – Annual Report**

The Database Activity – Annual Report gives you an overview of activity for the databases to which you subscribe for a twelve month period.

The report shows:

- The total number of searches in each database, broken down by location.
- The number of articles retrieved from each search, broken down by the format provided (Citation / Abstract, Any full text Format).
- The previous years totals for each column, plus the percent change from the previous year.
- The total number of unique searches.

If you display a report for a grouped site (such as a consortium), you will see a summary section that totals all usage for the entire consortium (the master client). You can also select to view a detailed section that displays the usage for each of the individual clients (the child clients).

### **Database Activity – Detail Report**

The Database Activity – Detail Report gives you an overview of the activity for the databases to which you subscribe.

The report shows:

- The total number of searches in each database, broken down by location and login name.
- The number of searches and document usage broken out by location, database, and login name.
- The number of articles retrieved from each

search, broken down by the format provided (Citation / Abstract, Any full text Format).

If you choose to display the report for all sites in a grouped site (such as a consortium), there will be a summary section that totals all usage for the entire consortium, and a detailed section that breaks out usage by the individual clients (location).

### **Document Usage by Database/Journal**

The Document Usage by Database/Journal Report gives you an overview of the documents retrieved for the databases to which you subscribe, for the period of time you specify.

This report shows:

- The total number of articles retrieved broken out by location and database.
- The total number of articles retrieved from each publication, broken out by the format delivered (Citation, Abstract, Full Text, Text + Graphics, Page Image, Page-Map, and Article-Image).

If you choose to display the report for all sites in a grouped site (such as a consortium), there will be a summary section that totals all usage for the entire consortium, and a detailed section that breaks out usage by the individual clients (location).

### **Document Usage by Delivery Method**

This report gives you a summary of the documents retrieved for the databases to which you subscribe, during the period of time you select.

This report shows:

- The total number of documents provided broken out by location and delivery method (Electronic Mail, On-Line Display or Fax).

If you choose to display the report for all sites in a grouped site (such as a consortium), there will be a summary section that totals all usage for the entire consortium, and a detailed section that breaks out usage by the individual clients (location).

### **Document Usage by Organization**

This report gives you a summary of the number of articles retrieved for the databases to which you subscribe, during the period of time that you select.

This report shows:

- The total number of documents provided, broken out by location
- The format retrieved (Citation Abstract, Any Full Text Format).

If you choose to display the report for all sites in a grouped site (such as a consortium), there will be a summary section that totals all usage for the entire consortium, and a detailed section that breaks out usage by the individual clients (location).

### **Searches by Search Mode**

This report provides an overview of the searches used by the different login accounts for a specific period.

This report shows:

- Total number of searches broken out by location and login name.
- The total number of searches using each mode (Basic, Guided, Advanced, Natural Language, Publication or Topic)

If you choose to display the report for all sites in a grouped site (such as a consortium), there will be a summary section that totals all usage for the entire consortium, and a detailed section that breaks out usage by the individual clients (location).

### **Searches by Time**

This report provides an overview of the searches performed over the last 14 days.

This report shows:

- The daily usage broken down by client and login name.
- The number of searches performed each hour of each day during the 14 day period.

Note: The hourly information provided in the report is based on EDT (GMT: - 5:00).

If you choose to display the report for all sites in a grouped site (such as a consortium), there will be a summary section that totals all usage for the entire consortium, and a detailed section that breaks out usage by the individual clients (location).

### **Counter Database Report 1**

This report meets the Counter 2003 code of practice, and provides information on the total searches performed broken down by database and month for a 12 month period (you can control the period by selecting the desired end date).

Note: ProQuest sessions are not directly related to databases. The session count reported is identical for all databases.

This report is valid only for data after December of 2003 when Counter reports were introduced.

This report shows:

- The total number of searches performed, broken down by month and database.
- The total number of sessions, broken down by month and database.

According to Counter definitions:

- A **Search** is defined as “A specific intellectual query, typically equated to submitting the search form of the online service to the server.”
- A **Session** is defined as “A successful request of an online service. It is one cycle of user activities that typically starts when a user connects to the service or database and ends by terminating activity that is either explicit (by leaving the service through exit or logout) or implicit (timeout due to user inactivity) (NISO).”

### Counter Database Report 3

This report is in accordance with the Counter 2003 code of practice, and provides information on the total searches performed broken down by database and month for a specific period.

Note: ProQuest sessions are not directly related to databases. The session count reported is identical for all databases.

This report is valid only for data after December of 2003 when Counter reports were introduced.

This report shows:

- The total number of searches performed, broken down by month and database.
- The total number of sessions, broken down by month and database.

According to Counter definitions:

- A **Search** is defined as “A specific intellectual query, typically equated to submitting the search form of the online service to the server.”
- A **Session** is defined as “A successful request of an online service. It is one cycle of user activities that typically starts when a user connects to the service or database and ends by terminating activity that is either explicit (by leaving the service through exit or logout) or implicit (timeout due to user inactivity) (NISO).”

### Counter Journal Report 1

This report meets the Counter 2003 code of practice. It provides information on the number of full-text articles retrieved, broken down by month and journal.

This report is valid only for data after December of 2003 when Counter reports were introduced.

This report shows:

- The total number of print full-text articles retrieved, broken down by month and journal.

According to Counter definitions:

- A **Full Text Article** is defined as “The complete text, including all references, figures and tables, of an article, plus links to any supplementary material published with it.”
- A **Journal** is defined as “A serial that is a branded and continually growing collection of original articles within a particular discipline”
- **Print ISSN** is defined as “Free text format (up to 13 characters in future) Unique International Standard Serial Number assigned to the print version of a journal by the national ISSN agency of the country from which the journal is published”
- **Online ISSN** is defined as “Free text format (up to 13 characters in future) Unique International Standard Serial Number assigned to the online version of a journal by the national ISSN agency of the country from which the journal is published.”
- A **Search** is defined as “A specific intellectual query, typically equated to submitting the search form of the online service to the server.”
- A **Session** is defined as “A successful request of an online service. It is one cycle of user activities that typically starts when a user connects to the service or database and ends by terminating activity that is either explicit (by leaving the service through exit or logout) or implicit (timeout due to user inactivity) (NISO).”

## Create and Edit a Usage Report

To create a usage report, follow these steps:

- 1 Make sure you are on the **Usage Reports, Create a Usage Report** page:
  - Click the **Usage Report** tab, and make sure the **Create a Usage Report** tab is selected.
  - Or, select **View/download usage reports** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Select the desired **Report Type**. The **About this Report Type** area provides a summary of the currently selected report type.
- 4 Select your **Delivery Method**.  
The Delivery Method option lets you select how you would like to receive your report. Depending on the method you select, the remaining selections (steps 5-10) may or may not be available. The methods are:
  - **Display to screen as Web Page** The report will display within 90 seconds.
  - **Email Report now** The report will arrive by email within 24 hours.
  - **Download now** The report can be downloaded immediately.
  - **Schedule report for periodic Email delivery** The report will be delivered according to the Scheduled Delivery Options you select.
- 5 Select whether or not to **show Items with zero usage**. Check **Yes** to view all items, including those that have not been used. Check **No** to only view those items that have been used during the usage period.
- 6 Select whether or not to **show detailed statistics breakout for each site in this multi-level account**. Check **Yes** to view the statistical breakout for each site in addition to account summary. Check **No** to only view summary information for the account as a whole.
- 7 Select the desired **usage period** (the time period you want included in the usage report). The options available here will vary, depending on the Report Type you select.
- 8 If you have chosen to schedule reports for periodic delivery, select when and how frequently the reports are emailed to you in the **Scheduled Delivery Options** area.

- Use the first drop down box to select the day of the month you want to receive the report.
  - Use the second drop down box to select the frequency you want to receive the reports.
  - Use the third drop down box to set the month for the initial report.
- 9 Select the desired **Delivery Format**.
    - **Emailed Reports** are available as HTML files, '~' delimited files, or CSV files (which are Excel compatible).
    - Downloaded Reports are available as either '~' delimited files, or CSV files (which are Excel compatible).
    - **Scheduled Reports** are available as HTML files, '~' delimited files, or CSV files (which are Excel compatible).
  - 10 Enter the desired **Email Address**. You may only enter one email address.
  - 11 Click **Create Report**.
  - 12 Continue as follows:
    - If you have selected to view the report**, it will appear within a few seconds.
    - If you have selected to email the report**, it will be emailed within 24 hours.
    - If you have selected to download the report:**
      - You see a **Save As** dialog box.
      - Click **Save**. Navigate to where you want to save the file.
      - Click **Save**.
      - If you have scheduled a report**, it will be emailed on the selected date.

## Download an HTML Report

- 1 Make sure you are on the **Usage Reports, Create a Usage Report** page:
  - Click the **Usage Report** tab, and make sure the **Create a Usage Report** tab is selected.
  - Or, select **View/download usage reports** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Select the desired **Report Type**. The **About this Report Type** area provides a summary of the currently selected report type.
- 4 Select **Display to screen as Web Page** from **Delivery Method**.
- 5 Set the options for **Show items with zero usage**, **Show detailed statistics breakout for each site in multi-level accounts**, and **Usage Period**. (See [Create and Edit a Usage Report](#) for more information on these options.)
- 6 Click **Create Report**.  
You will see the desired report on screen.
- 7 Select **Save as** from your browser's File Menu and save the page to your hard disk.

If your report is large, you may get an error message when attempting to view to screen. If this happens, try setting the **Delivery Method** to **Email Report Now** and the **Delivery Format** to **HTML**.

## Download a Report in CSV Format for Use in Excel

- 1 Make sure you are on the **Usage Reports, Create a Usage Report** page:
  - Click the **Usage Report** tab, and make sure the **Create a Usage Report** tab is selected.
  - Or, select **View/download usage reports** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Select the desired **Report Type**. The **About this Report Type** area provides a summary of the currently selected report type.
- 4 Select **Download now** from **Delivery Method**.
- 5 Set the options for **Show items with zero usage**, **Show detailed statistics breakout for each site in multi-level accounts**, and **Usage Period**. (See [Create and Edit a Usage Report](#) for more information on these options.)
- 6 Set the **Delivery Format** to **CSV file (Excel compatible)**.
- 7 Click **Create Report**.  
You see a **Save As** dialog box.
- 8 Click **Save**. Navigate to where you want to save the file.
- 9 Click **Save**.

You can now [import the report into Excel](#).

## Import a CSV Format Report into Excel

Before you can import a report into Excel, you will need to [download the report in CSV format](#).

Once you have done that, follow these steps to open the report in Excel:

- 1 Launch Excel. If it doesn't open with a blank worksheet, create a new worksheet.
- 2 From the File menu, select **Open**.
- 3 Navigate to the file you downloaded. Select the file and click **Open**.

The spreadsheet will open in the Excel window. Adjust your column widths, fonts, etc., as necessary.

You can then sort titles by date, ISSN, title, or any other column by using the Sort function under the Data Menu.

## View a Report

- 1 Make sure you are on the **Usage Reports, Create a Usage Report** page:
  - Click the **Usage Report** tab, and make sure the **Create a Usage Report** tab is selected.
  - Or, select **View/download usage reports** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Select the desired **Report Type**. The **About this Report Type** area provides a summary of the currently selected report type.
- 4 Select **Display to screen as Web Page** from **Delivery Method**.
- 5 Set the options for **Show items with zero usage, Show detailed statistics breakout for each site in multi-level accounts, and Usage Period**. (See [Create and Edit a Usage Report](#) for more information on these options.)
- 6 Click **Create Report**.  
You will see the desired report on screen.

## Email a Report

Follow these steps to email a usage report:

- 1 Make sure you are on the **Usage Reports, Create a Usage Report** page.  
If you have access to multiple Accounts or clients, select the desired **Account** from the drop-down.  
(If there is only one client available, the Account is static text, rather than a drop-down).
- 2 Select the desired **Report Type**. The About this Report Type area provides a summary of the currently selected report type.
- 3 Select **Email report now** from **Delivery Method**.
- 4 Set the options for **Show items with zero usage, Show detailed statistics breakout for each site in multi-level accounts, and Usage Period**.
- 5 Set the **Delivery Format** to **HTML-display as a Web page, '~' delimited file or CSV file (Excel compatible)**.
- 6 Enter the desired **Email Address**, where you want to receive the usage report.
- 7 Click **Create Report**.  
You see a confirmation page. Click **Back** to return to the **Create a Usage Report** page.  
Your report will be emailed within 24 hours.

## Schedule a Report

- 1 Make sure you are on the **Usage Reports, Create a Usage Report** page:
  - Click the **Usage Report** tab, and make sure the **Create a Usage Report** tab is selected.
  - Or, select **View/download usage reports** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Select the desired **Report Type**. The **About this Report Type** area provides a summary of the currently selected report type.
- 4 Select **Scheduled report for periodic Email delivery** from **Delivery Method**.
- 5 Set the options for **Show items with zero usage**, **Show detailed statistics breakout for each site in multi-level accounts**, and **Usage Period**. (See [Create and Edit a Usage Report](#) for more information on these options.)
- 6 Set the **Delivery Format** to **HTML-display as a Web page**, **'~' delimited file** or **CSV file (Excel compatible)**.
- 7 Enter the desired **Email Address**, where you want to receive the usage report.
- 8 Click **Create Report**.  
You see the **Usage Reports, Scheduled Reports** page showing your newly scheduled report.

## View a Scheduled Report Immediately

If you want to view a scheduled report immediately, follow these steps:

- 1 Make sure you are on the **Usage Reports, Scheduled Reports** page:
  - Click the **Usage Report** tab, and make sure the **Scheduled Reports** tab is selected.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Edit** in the Action column of the report you want to view.  
You see the **Usage Reports, Create a Usage Report** page displaying the information for the selected report.
- 4 Change the **Delivery Method** to **Display to screen as Web Page**.
- 5 Double-check your remaining settings, especially the **Usage Period**.
- 6 Click **Create Report**.  
The report will appear on your screen within a few seconds.

## Email a Scheduled Report Immediately

If you want to email a scheduled report immediately, follow these steps:

- 1 Make sure you are on the **Usage Reports, Scheduled Reports** page:
  - Click the **Usage Report** tab, and make sure the **Scheduled Reports** tab is selected.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Edit** in the Action column of the report you want to view.  
You see the **Usage Reports, Create a Usage Report** page displaying the information for the selected report.
- 4 Change the **Delivery Method** to **Email Report now**.
- 5 Double-check your remaining settings, especially the **Usage Period** and the **Email address**.
- 6 Click **Create Report**.

The report will be emailed within 24 hours.

## Edit a Scheduled Report

To create a new Scheduled Usage Report, follow the steps in [Schedule a Report](#). Once you have scheduled reports, you may need to edit or delete reports. The **Usage Reports, Scheduled Reports** page lets you:

- View your currently scheduled usage reports.
- Sort the reports in ascending or descending order on any column by clicking the up or down arrows next to a column header.
- Edit a report.
- Delete a report.

### Sort Reports

You can sort the reports by any of the data columns, making it easy to find the report you want.

Click the up-pointing arrow (▲) next to a column header to sort the reports in ascending order, based on that column. For example, click the up-pointing arrow next to **Next Delivery Date** to view the reports sorted by delivery date, with the next scheduled report at the top of the list.

Click the down-pointing arrow (▼) next to a column header to sort the reports in descending order, based on that column. For example, click the down-pointing arrow next to **Next Delivery Date** to view the reports sorted by delivery date, with the next scheduled report at the bottom of the list.

### Edit a Report

To edit a report, click **Edit** in the **Action** column for the desired report. You will see the **Usage Report, Create Report** page displaying the information for the selected report. Make the desired changes and click **Create Report** to save the changes.

### Delete a Report

To delete a report, click **Delete** in the **Action** column for the report you want to delete. You will see a confirmation dialog asking if you are sure you want to delete the report. Click **OK**.

## Account Preferences



The Account Preferences tab lets you configure authorization settings, set the default search interface settings for user groups, set your branding options, and create links to ProQuest databases.

### About Limiting Access

ProQuest gives you several ways to limit who can access your account. Which method works best will depend on several things. You can use any or all of the following methods:

#### Local Access

If your users will be accessing ProQuest from local computers, you can configure your account using IP Ranges to limit access.

Under this method, you enter a range or range of IP addresses. Only computers with IP addresses within this range will be permitted to access your site.

This method is very effective for local computers, if your users are not local, you will want to consider a remote access method.

#### Remote Access

If your users will be accessing ProQuest from remote locations, such as library patrons connecting from home, you can set up remote access preferences to ensure that your ProQuest links are protected from unauthorized use. There are three different methods of remote access available:

- **Remote Access Using Referring URL**  
Under this method, users login to your site under your own authentication system. From a secure page on your site they can then connect to ProQuest. This option is not configured from LAD. To set up this method of remote access you need to contact your customer service representative.
- **IP Range**  
Under this method, users and connect to ProQuest from specific IP addresses.
- **Barcode Validation with Checkdigit**  
Under this method, users login to your site by using a barcode on the basis of correct length, prefix and checkdigit calculation.
- **Remote User ID/Barcode Lookup with password**  
Under this method, ProQuest validates users by checking barcodes and passwords. Barcodes can be uploaded in batch or individually edited.
- **Remote User ID/Barcode Lookup - no password**

Under this method, ProQuest validates users by checking barcodes. Barcodes can be uploaded in batch or individually edited.

### Configuring Authentication

The top section of the **Account Preferences, Authentication** page displays information on the current Account and Client.

The center section displays the current Local Authentication Server. You can edit this information if desired. This URL should point to a secure login page on your server where you want users directed if cascading authentication fails when they try to connect to ProQuest.

The bottom section displays the current User IDs. You can add, view, and edit these User IDs. You can also edit a user group.

## **Add a new Authentication User ID**

You can add multiple User IDs, with different authentication details. For example, you may want to enter a user ID for library patrons who are authenticated by Barcode, and another user ID for employees authenticated by IP range.

To add a new User ID, follow these steps:

- 1 Make sure you are on the **Account Preferences, Authentication** page:
  - Click the **Account Preferences** tab, and make sure the **Authentication** tab is selected.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Add New User ID**.

You see the **Add a New User ID** page.

- 4 Select the **User Group** from the drop down menu.
- 5 Enter a **First Name** and **Last Name**.
- 6 Click **Continue**.
- 7 Write down or print the new User ID information to provide the user. Tell them that they should change their password the first time they login.
- 8 Click **Done** if you don't want to configure the **User ID**. You will be taken back to the **Authentication** page.

Or click **Continue** to configure the User Ids authentication method immediately.

You see the **Edit User ID** page.

How you proceed next depends on your authentication method:

## **Authentication by IP Range**

ProQuest lets you limit access to your ProQuest account by entering a range of IP addresses. Only computers with IP addresses within this range will be permitted to access your site. IP address restriction is a good security option for local access. This option is only available if IP range authentication has been implemented. If not, you will see a message telling you to notify ProQuest Technical Support.

For security purposes, you can only enter an IP address for a single ID or user. For this reason, it's a good idea to be as specific as possible when entering IP ranges, and may want to only enter specific IP addresses.

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.

- 1 Make sure you are on the **Edit User ID** page:
  - From the **Account Preferences, Authentication** page, click **View/Edit** in the Action column of the User ID for which you want to configure the IP range.
  - After adding a new ID, click **Continue**.
- 2 Click **Edit** next to **IP Ranges for Automatic Login to ProQuest**.

You see the **Edit IP Ranges** page.

- 3 Do one of the following:
  - To add a new IP range, enter the starting and ending IP addresses in the **Add New IP Range** section then click **Add**.
  - To add a new IP address, enter the IP address in the Starting IP boxes of the **Add New IP Range** section, then click **Add**.
  - To edit an IP range, change the starting or ending IP addresses in the **Current IP ranges** section, then click **Update**.
  - To delete an IP range, click **Delete** after the desired IP range.
- 4 When you are finished, click **Done** to return to the Authenticate page.

## Authentication by User ID or Barcode

You can configure your server to permit remote users, such as library patrons connecting from home, to access ProQuest through your server. These settings ensure that your ProQuest links are protected from unauthorized use.

- 1 Make sure you are on the **Edit User ID** page:
  - From the **Account Preferences, Authentication** page, click **View/Edit** in the Action column of the User ID for which you want to configure the IP range.
  - After adding a new ID, click **Continue**.
- 2 Click **Edit** to modify or **Add** to add Remote Access to the ID.  
You see the **Edit Remote Access Settings** page.
- 3 Under **Choose a Remote Access Method**, select one of the available remote access methods:
  - **Barcode Validation with Checkdigit** This remote access method validates the patron barcode on the basis of correct length, prefix and checkdigit calculation.
  - **Remote User ID/Barcode Lookup - with password** This remote access method validates the patron by looking up the barcode. Barcodes can be uploaded in batch or individually edited.
  - **Remote User ID/Barcode Lookup - no password** This remote access method validates the patron by looking up the barcode. Barcodes can be uploaded in batch or individually edited.
- 4 Click **Continue**.  
You see the **Edit Remote Access Settings** page for the selected authentication method.
- 5 If you selected **Barcode Validation with Checkdigit**:
  - Select the exact length of your library card number (up to a maximum of 50 characters) from the **Barcode Length** pull-down box.
  - Select the length of your library card prefix (up to a maximum of 10 characters) from the **Prefix Length** pull-down box. (This setting is used to skip the prefix in the checkdigit calculation for DRA type barcodes.)
  - In the **Barcode Prefixes** boxes, enter up to 10 library card prefixes. If you need additional prefixes, it is recommend that you enable remote access on more than one ProQuest User ID.

- 6 If you selected **Remote User ID/Barcode Lookup - with password**:
  - Enter the User ID In the **Add a New Remote User ID** section.
  - Enter the user **password**.
  - Click **Add**.
  - Repeat for each user.  
OR
  - To upload a text file of User ID/Password pairs, click **Browse** in the **Upload Remote User Record File** section and navigate to the appropriate file.
  - Select **Append to Current List** to add the new user information to the end of the current information. Select **Overwrite Current List** to replace the current information with the information you are uploading. All your current information will be deleted.
  - Click **Upload**.
- 7 If you selected **Remote User ID/Barcode Lookup - no password**:
  - Enter the User ID In the **Add a New Remote User ID** section.
  - Click **Add**.
  - Repeat for each user.  
OR
  - To upload a text file of User IDs, click **Browse** in the **Upload Remote User Record File** section and navigate to the appropriate file.
  - Select **Append to Current List** to add the new user information to the end of the current information. Select **Overwrite Current List** to replace the current information with the information you are uploading. All your current information will be deleted.
  - Click **Upload**.
- 8 Click the **Login Preferences (optional)** tab.
- 9 Confirm that you want to save your settings.  
You see the Login Page Preferences page.
- 10 Enter the **Description Text**, **Logo URL**, **Login Screen Prompt**, and **Password Prompt** that you want displayed in the user's login dialog box.
- 11 Click **Save**.

## ***Search/Maintain Individual Remote User Records***

To locate an individual remote user:

- 1 Enter the user's name in the search field.  
You can enter the complete name that you are looking for, or use the question mark (?) as a wildcard character to find all names beginning with a particular letter.
- 2 Click **Search**.  
You will be taken to the first match alphabetically.

To view all remote users:

- 1 Click the **Show All** link.

To download a list of all remote users:

- 1 Click the **Download Complete List** link.  
You will see the **File Download** dialog box.
- 2 Navigate to where you want to save the file and click **Save**.  
The file will save in text format.

To delete a remote user:

- 1 Locate the user.
- 2 Click **Delete** after the user name.

To change a user's password:

- 1 Locate the desired user.
- 2 Click **Change Password**.
- 3 Make the desired changes, and click **Save**.

## **Set Search Interface Settings**

You can set the default search method used by ProQuest. This is the search page that is displayed by default when a user logs in to ProQuest.

The available options and an explanation of each follows.

### **Show Browse Topics in "Tools" bar when available**

Select the Show Browse Topics in "Tools" bar when available check box to display the Browse Topics link in the toolbar on search screens for databases supporting Browse Topics.

Clear the check box to keep the Browse Topics link from showing.

### **Display database drop-down box on search pages**

Select the Display database drop-down box on search pages to display the database drop-down on search pages to let users switch databases searched quickly.

Clear the check box to keep the database drop-down from showing.

### **Display "Limit to full text" checkbox**

ProQuest lets you control whether or not the Limit to full text checkbox is displayed. When this box is displayed, users can limit their searches to articles that are available in Full Text format.

Check Display "Limit to full text" to display the limit to full text checkbox.

Or clear the box to hide the checkbox.

### **Start with "Limit to full text" checked by default**

When you select to display the Limit to full text checkbox, you can control whether or not the checkbox is checked by default. When this box is checked, searches will be limited to articles that are available in Full Text format.

Check Start with "Limit to full text" checked by default to have the limit to full text checkbox checked by default.

Or clear the box to leave the checkbox unchecked by default.

### **Default "Look for terms in" to**

The Default "Look for terms in" to option lets you control where ProQuest searches by default.

Select **Citation and article text**, or **Citation and abstracts**.

When **Citation and article text** is selected, ProQuest searches within the complete text of the article, the citation fields, and the abstract.

When **Citations and abstracts** is selected,

ProQuest searches several fields (the specific fields searched depend on the database or databases selected).

### **Display "More options" as open in Basic by default**

This setting lets you control whether More Options are displayed by default on the Basic Search page.

Check Display "More options" as open in Basic by default to have the "more options" section of the Basic Search page expanded by default.

Or clear the box to leave the section closed by default.

### **Display "More options" as open in Advanced by default**

This setting lets you control whether More Options are displayed by default on the Advanced Search page.

Check Display "More options" as open in Advanced by default to have the "more options" section of the Advanced Search page expanded by default.

Or clear the box to leave the section closed by default.

### **Enable Natural Language Searching**

This setting lets you control whether searches are intercepted for Natural Language Searching.

Check Enable Natural Language Searching to intercept and translate searches using a natural language search.

Or clear the box to turn this intercept off.

### **Enable Spelling Variants**

This setting lets you control whether ProQuest will search for spelling variants (for example, color and colour.)

Check Enable Spelling Variants to intercept and search for spelling variants.

Or clear the box to turn this option off.

### **Enable Related Terminology**

This setting lets you control whether the related terminology is available to users. The related terminology option lets users include terms related to the search words when doing an Advanced Search in ProQuest.

Check Enable Related Terminology to let users turn words similar to their Search by Word terms on or off.

Or clear the box to prevent users from seeing this option.

### **Default number of hits to display on Results Page**

ProQuest lets you control the default number of

results to display per page.

In the Default number of hits to display on Results Page, select 10, 20, or 30.

### **Enable Article Translation**

Click Enable Article Translation to let users request a machine-generated translation of the article in Spanish or Portuguese.

Or clear the box to hide the links requesting translations.

### **Allow articles to be emailed**

This setting lets you control whether users can email articles

Check Allow articles to be emailed to let users email articles from ProQuest.

Or clear the box to prevent emailing.

### **Default Citation Style for "Print Bibliography"**

ProQuest lets you control the default style to use for citations.

In the Default Citation Style for "Print Bibliography" field, select the desired citation style.

### **Where to display Smart Search selection on Result page**

ProQuest lets you control where the smart search suggestions appear on the results page.

In the Where to display Smart Search selection on Result page field, select:

**No Smart Search** keeps the suggestions from appearing.

**Top and Bottom** displays the suggestions at the top and bottom of the page.

Top of page displays the suggestions at the top of the page.

**Bottom of page** displays the suggestions at the bottom of the page.

### **Override "find a copy" wording for CrossLinks on Result page with the following text:**

When there is a CrossLink set up for a publication title, the "Find a copy" format icon appears on the results page when there is no full text available.

This option lets you replace the "Find a copy" text that accompanies this icon with your own wording. This is an optional setting.

Enter the desired text in the text box to have it appear on the Results Page.

Or, leave the box empty to use the "find a copy" text.

### **ProQuest Dissertations and Theses—display purchasing options**

ProQuest lets you control whether or not patrons see the purchasing options icon for documents that

are not prepaid. This allows patrons to order microform or paper copies, or if a PDF version is not available through the institution's subscription, patrons can purchase one for download.

Check ProQuest Dissertations and Theses—display purchasing options to show the Full Text Options icon.

Or, clear the box to prevent patrons from viewing this icon.

### **Enable Search alerts to be set up**

ProQuest lets users create alerts for searches. This option lets you control whether or not the Set Up Alerts button is available to users.

Check Enable Search alerts to be set up to let users create alerts for searches.

Or, clear the box to prevent users from creating search alerts.

### **Enable Publication alerts to be set up**

ProQuest lets users create alerts for publications. This option lets you control whether or not the Set Up Alerts button is available to users on the Publication page.

Check Enable Publication alerts to be set up to let users create alerts for publications.

Or, clear the box to prevent users from creating publication alerts.

### **Link Prefix Default Value for Durable URLs**

This option is only used by institutions that utilized a pseudo-proxy script as part of their authentication schema. Specify a prefix to append to the beginning of Durable URLs. The link prefix contains the protocol, server, and service names. By specifying a link prefix, you ensure that when a user clicks on a Durable Link, the request is routed through your server before being passed on to ProQuest. Similarly, pages sent back by ProQuest in response to Durable Link requests are also routed through your server before being delivered to the user.

### **Display Databases page at startup**

ProQuest provides users with the ability to search a wide variety of databases. This option lets you control whether users view the databases page or a search page when they log in to ProQuest.

Check Display Databases page at startup to let users begin at the databases page and select the databases they want to work with.

Or clear the box to let users begin at a search page.

### **Display language selection**

This option lets you control whether users can

access the language selection menu.

Check the Display language selection check box to let users access the language selection pull-down menu.

OR clear the box to prevent users from accessing the menu.

**Show subject directory open w/in Topic Guide by default**

Select the Show subject directory open w/in Topic Guide by default check box to display the subject directory in its tree form by default (for databases supporting Topic Trees).

Clear the check box to display the subject directory collapsed by default.

**Library name and location (name, city, state) for use in Citation**

Enter the name and location (name, city, and state) of the library if desired. This information will be added to any citations generated by users. If you leave this blank, citations will contain **\*\*\*INSERT Library name or system, City, State\*\*\***.

**Default search mode for Third Party DBs**

ProQuest lets you control the default mode used to display search results in third party databases.

In the Default search mode for Third Party DBs field, select the desired search mode.

**Enable links to CINAHL Express Service**

Check the Enable links to CINAHL Express Service check box to display a link from the citation area of the article record to CINAHL express when available. Clear the check box to keep this link from displaying.

**Enable CINAHL continuing Education Modules**

Check the Enable CINAHL continuing Education Modules to display links from the citation with images format page to interactive learning modules when available. Clear the check box to keep the link from displaying.

## About Branding Options

ProQuest lets you customize your ProQuest site by adding Library Branding. This lets you display up to three links at the top [1], customized text [2] at and up to two logos at the bottom of your ProQuest pages [3].



## Add a Link

Follow these steps to add a link:

- 1 Make sure you are on the **Account Preferences, Branding Options** page:
  - Click the **Account Preferences** tab, and make sure the **Branding Options** tab is selected.
  - Or, select **Add/edit your logos and branding options** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Add Link** next to an empty link slot. You see the **Add Links** pop up window.
- 4 Enter the text to display for your link.
- 5 Enter the URL for your link.
- 6 From the Window Option pull-down menu, select the link behavior (Open in same window, or Open in a popup window.)
- 7 Select whether or not to log users out when the link is clicked.
- 8 Click **Save** to save the changes. You see a confirmation window. Click **Done** to return to LAD.

## Edit a Link

Follow these steps to edit a link:

- 1 Make sure you are on the **Account Preferences, Branding Options** page:
  - Click the **Account Preferences** tab, and make sure the **Branding Options** tab is selected.
  - Or, select **Add/edit your logos and branding options** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Edit** next to the link. You see **Edit Links** pop up window.
- 4 Make the desired modifications to the text to display for your link, the URL for your link, the link behavior, and whether or not to log users out when the link is clicked.
- 5 Click **Save** to save the changes. You see a confirmation window. Click **Done** to return to LAD.

## Delete a Link

To delete a link:

- 1 Make sure you are on the **Account Preferences, Branding Options** page:
  - Click the **Account Preferences** tab, and make sure the **Branding Options** tab is selected.
  - Or, select **Add/edit your logos and branding options** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Remove Link** next to the link you want to delete.

## Adding Consortium Links

ProQuest lets consortiums share links and logos across the consortium quickly. However, these must be applied first at the consortium level, then accepted at the child account level. Follow these steps to apply a logo or link to all accounts within the consortium:

- 1 Sign in to your account as the consortium master and apply the logo or link in slot 1.
- 2 Sign out, then sign in again as a child account master (alternately, the individual child account managers can complete the remaining steps).
- 3 Select to use the logo in slot 1.

## Customized Text

ProQuest lets you customize the display by adding text to the bottom of the page.

- 1 Make sure you are on the **Account Preferences, Branding Options** page:
  - Click the **Account Preferences** tab, and make sure the **Branding Options** tab is selected.
  - Or, select **Add/edit your logos and branding options** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 In the **Customized Text** area, enter the text you want to appear at the bottom of the page.
- 4 Click **Save**.

## About Logos

In this area 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, measure 150 by 40 pixels, and cannot exceed 20K.

Slots containing a link will display that information. Empty slots will display [none].

Any changes (adding or deleting a logo) will take up to 24 hours before they appear on your pages.

## Add a Logo

Follow these steps to add a logo:

- 1 Make sure you are on the **Account Branding Options** page:
  - Click the **Account Preferences** tab, and make sure the **Branding Options** tab is selected.
  - Or, select **Add/edit your logos and branding options** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Add Logo** next to an empty logo slot. You will see the **Add Logo** pop up window.
- 4 Click on **Browse** next to the Upload image: field. Navigate to your logo, and click **Open**.
- 5 Enter the destination URL (the page to load when users click on the logo).
- 6 Enter the alt text to display if the logo cannot be displayed.
- 7 Click **Save** to save the changes you have made.  
You see a confirmation page.
- 8 Click **Done** to return to LAD.

Any changes (adding or deleting a logo) will take up to 24 hours before they appear on your pages.

## Edit a Logo

Follow these steps to change a logo:

- 1 Make sure you are on the **Account Preferences, Branding Options** page:
  - Click the **Account Preferences** tab, and make sure the **Branding Options** tab is selected.
  - Or, select **Add/edit your logos and branding options** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Edit Logo** next to the logo you want to modify.  
You will see **Edit Logo** pop up window.
- 4 Make any edits to the image, URL and alt text.
- 5 Click **Save** to save the changes you have made.  
You see a confirmation page.
- 6 Click **Done** to return to LAD.

Any changes (adding or deleting a logo) will take up to 24 hours before they appear on your pages.

## Delete a Logo

Follow these steps to delete a logo:

- 1 Make sure you are on the **Account Preferences, Branding Options** page:
  - Click the **Account Preferences** tab, and make sure the **Branding Options** tab is selected.
  - Or, select **Add/edit your logos and branding options** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Remove Logo** next to the logo you want to delete.

Any changes (adding or deleting a logo) will take up to 24 hours before they appear on your pages.

## Create Custom Login URLs

The **Links to ProQuest** page lets you create specialized links to individual databases or pre-selected combinations of databases that let users log in with specific settings. These links can be added to your own web pages or to create a menu of electronic resources.

For example, you can create a customized link for users who want to search newspapers, setting the default search to Full Text. You can create a second link for others with the default search set to Citation/Abstract. Users can then select the link they want, and open ProQuest with the desired settings. You can:

- Offer pre-selected combinations of databases for cross-searching
- Set special search option defaults for these database(s)

Follow these steps to create a link to ProQuest:

- 1 Make sure you are on the **Account Preferences, Create Links to ProQuest Databases** page:
  - Click the **Account Preferences** tab, and make sure the **Create Links to ProQuest Databases** tab is selected.
  - Or, select **Create custom links to ProQuest Databases** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Select the desired databases:
  - Select the ProQuest Database types you want to include.  
The list of databases below will change, depending on the database type selected.
  - Select the database or databases to include.  
(Note: Some databases, such as the Professional Research Databases are not cross-searchable, and will let you select only a single database.)
- 4 If you want, set the desired search settings:
  - Click **Select Search Settings**.
  - You see a page displaying the currently selected databases, and the current search settings.
  - Set the desired search settings.
- 5 Click **Create URL**.

You will see a page displaying the settings. In the yellow section you will see a custom link.

- 6 Highlight the link and copy it.
- 7 Paste the link in the Address bar of your browser.
- 8 To create a desktop icon of the link for patrons to use, drag the URL from the Address bar to the Desktop.

## About Database Types

Select the desired database type to view the available databases.

### ProQuest Classic (cross-searchable)

This group includes databases such as ABI/INFORM. This group is cross-searchable, you can select one or more databases.

### PQ Historical Databases (cross-searchable)

This group includes databases of historical data, such as ProQuest Historical Newspapers and APS Online. This group is cross-searchable, you can select one or more databases.

### Professional Research Collections (Third Party)

This group includes professional research collections, such as MedLine, PsycINFO, and CINAHL. This group is not cross-searchable. You can select only one database.

## Collection Information

Home Usage Reports Account Preferences **Collection Information** CrossLinks and Holdings LAD Login Profiles Quick Pick: -Select a task-

Collection Information

Title List MARC Records

### View a Title List

To view title lists, follow these steps:

- 1 Make sure you are on the **Collection Information, Title List** page:
  - Click the **Collection Information** tab, and make sure the **Title List** tab is selected.
  - Or, select **View/download ProQuest title lists** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Select the desired database(s) from which you want to retrieve titles.

To select multiple databases, Windows users should hold down the Ctrl key while clicking on databases. Macintosh users should hold down the Apple/Command key while clicking on databases.
- 4 Check **Full text titles only** if you want to limit the results to publications available in full text format.
- 5 Select the information you want to view for each publication. You can use the **Select/Clear all fields** links to quickly select or clear all fields.
- 6 Select the **Delivery Format** you want.
- 7 Click **Create Title List**.

The Title List will display in a new window.

### Make a Title List available to patrons

To make your title list available to your patrons, follow these steps:

To view title lists, follow these steps:

- 1 Make sure you are on the **Collection Information, Title List** page:
  - Click the **Collection Information** tab, and make sure the **Title List** tab is selected.
  - Or, select **View/download ProQuest title lists** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Select the desired database(s) from which you want to retrieve titles.

To select multiple databases, Windows users should hold down the Ctrl key while clicking on databases. Macintosh users should hold down the Apple/Command key while clicking on databases.
- 4 Check **Full text titles only** if you want to limit the results to publications available in full text format.
- 5 Select the information you want to view for each publication. You can use the **Select/Clear all fields** links to quickly select or clear all fields.
- 6 In the **Delivery Format** section, click **URL**.
- 7 Click **Create Title List**.

A new window will open, displaying the summary information for the current Title List, and a URL to the Title List.
- 8 Copy the URL (in the yellow area) and paste it into the Address bar of your Browser window.
- 9 Then, either save the link or drag the address bar contents to your desktop to create a shortcut to the title list.

## Download a Title List

To download your title list, follow these steps:

- 1 Make sure you are on the **Collection Information, Title List** page:
  - Click the **Collection Information** tab, and make sure the **Title List** tab is selected.
  - Or, select **View/download ProQuest title lists** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Select the desired database(s) from which you want to retrieve titles.

To select multiple databases, Windows users should hold down the Ctrl key while clicking on databases. Macintosh users should hold down the Apple/Command key while clicking on databases.

- 4 Check **Full text titles only** if you want to limit the results to publications available in full text format.
- 5 Select the information you want to view for each publication. You can use the **Select/Clear all fields** links to quickly select or clear all fields.
- 6 Select the **Delivery Format** you want.
  - **HTML** to download an HTML page.
  - **Microsoft Excel** to download and use in Microsoft Excel.
  - **Text-only ASCII** to download a text file.
  - **ProQuest** to download the title list in the format used to upload to ProQuest Library Holdings.
- 7 Click **Create Title List**.

How you proceed next depends on the format you selected:

### HTML

- 1 You see the list onscreen.
- 2 Select **Save As** from the File menu.
- 3 Navigate to where you want to save the file.
- 4 Click **Save**.

The file is now ready to edit or add to your site.

### Microsoft Excel

- 1 You see a spreadsheet in the browser window.
- 2 Select **Save As** from the File menu.
- 3 Change the **Save as type**: option:

If you have Excel installed on your computer, save as an Excel worksheet.

If you don't have Excel on your computer, save the file as a comma delimited text file and follow the directions below to import the information into Excel.

- 4 Click **Save**.

The file is now ready to edit.

### Text-only ASCII

- 1 You see the text file on your screen.
- 2 Select **Save As** from the File menu.
- 3 Navigate to where you want to save the file.
- 4 Change the **Save as Type** option to **Text**.
- 5 Click **Save**.

The file is now ready to edit.

### ProQuest

- 1 You see the title list in your browser.
- 2 Select **Save As** from the File menu.
- 3 Navigate to where you want to save the file.
- 4 Change the **Save as Type** option to **Text**.
- 5 Click **Save**.

The file is now ready to upload to ProQuest Library Holdings.

## Importing Data into an Excel Spreadsheet

Follow these steps to import the CSV file into Excel:

- 1 Download the desired title list.
- 2 Close your browser and open Excel.
- 3 Choose **Open** from the File Menu and select the comma delimited file you saved.
- 4 The Excel Wizard will ask a few questions for formatting. Choose these settings:
  - Data type: delimited
  - Delimiters: comma (deselect any other settings)
  - Column data format: general
- 5 Click **Finish**.

The spreadsheet will open in the Excel window. Adjust your column widths, fonts, etc., as necessary.

You can now sort titles by date, ISSN, title, or any other column by using the Sort function under the Data Menu.

## About MARC Records

MARC Records are machine readable cataloging records that let you quickly and easily update your electronic catalog. ProQuest provides updates as more information becomes available through their library. You can use these updates to update your catalog, making it more useful to your patrons.

To simplify the process, you can subscribe (for free) to ProQuest MARC Records. Please contact Customer Service (within the United States, call 800/521-0600, ext. 2971. For inquiries outside of the United States and Canada call + 1-734-761-4700 ext. 2971). Or by email at customer\_service@il.proquest.com.) You can then control how often you receive ProQuest MARC Records updates.

Once you are set up to receive ProQuest Marc Records, updates are sent for all of ProQuest Databases that you currently subscribe to.

## MARC Record Links

LAD generates MARC records with Open URL links. These don't use an IP address, and will incorporate a base url if you have entered one on the MARC Record Delivery Setup page.

For example:

If you haven't entered a base URL, the link will look like this:

```
http://gateway.proquest.com/openurl?url_ver=Z39.88-2004&res_dat=xri:pqd&rft_val_fmt=info:ofi/fmt:kev:mtx:journal&genre=journal&req_dat=xri:pqil:pq_clntid=47684&svc_dat=xri:pqil:context=title&rft_dat=xri:pqd:PMID=31483
```

If you have entered the base URL

```
http://myownurl.com, the link will look like this:  
http://myownurl.com?url_ver=Z39.88-2004&res_dat=xri:pqd&rft_val_fmt=info:ofi/fmt:kev:mtx:journal&genre=journal&req_dat=xri:pqil:pq_clntid=47684&svc_dat=xri:pqil:context=title&rft_dat=xri:pqd:PMID=31483
```

## Request a full set of MARC Records Immediately

Follow these steps to request a complete set of ProQuest MARC Records:

- 1 Make sure you are on the **Collection Information, MARC Records** page:
  - Click the **Collection Information** tab, and make sure the **MARC Records** tab is selected.
  - Or, select **Get MARC records for ProQuest databases** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Make sure the email address is correct (you may need to scroll down to see this).
- 4 Click **Request Complete Set Now**.

You will receive a message providing instructions on where to go to download a set of up-to-date MARC records in your email within 24 hours.

## Set up ProQuest MARC Records Delivery

Follow these steps to set up regular delivery of ProQuest MARC Records delivery:

- 1 Make sure you are on the **Collection Information, MARC Records** page:
  - Click the **Collection Information** tab, and the **MARC Records** tab.
  - Or, select **Get MARC records for ProQuest databases** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 In the **Delivery Schedule** section, enter the **Effective Date**.  
Select the month and year from the drop-down menus to define the starting period for updates. (This will usually be the current date.)
- 4 In the **Delivery Schedule** section, enter the **Deliver every** information.  
Select how often you would like to have the update files delivered. You can select from as often as once a month to once a year (once every 12 months).  
Click the select button before the options below **Deliver every** to control when you want the update notification delivered. The first option lets you have the update notification delivered on a certain day of the month (such as the 15th of each month). The second option lets you have the update notification delivered on a specific weekday, weekend, or day of the week each month (such as the second Tuesday).
- 5 In the **Record Set Options** area, select what type of update records you want. This lets you request a complete up-to-date record set for your account or only records for titles that have changed.
- 6 By default the **Email Address** field contains the default email address for the account. You can accept this address or enter a different address. (You may only enter one email address.)
- 7 Click **Save Delivery Preferences**.

An email message containing a URL and instructions on how to download your ProQuest MARC records set will be sent on the day requested.

## Request Past Updates

To request the delivery of past updates, follow these steps:

- 1 Make sure you are on the **Collection Information, MARC Records** page:
  - Click the **Collection Information** tab, and make sure the **MARC Records** tab is selected.
  - Or, select **Get MARC records for ProQuest databases** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 In the **Delivery Schedule** section, enter the **Effective Date** and the **Delivery Schedule** section to cover the desired date.  
For example to get update records for the last six months you would enter the date from six months ago as the effective date and select 6 months for the delivery period.
- 4 In the **Record Set Options** area, select what type of update records you want. This lets you request a complete up-to-date record set for your account or only records for titles that have changed.
- 5 By default the **Email Address** field contains the default email address for the account. You can accept this address or enter a different address. (You may only enter one email address.)
- 6 Click **Save Delivery Preferences**.

An email message containing a URL and instructions on how to download your ProQuest MARC records set will be sent to the specified email address.

## CrossLinks and Holdings



### About CrossLinks

ProQuest CrossLinks is a powerful enhancement to the library holdings features available within your ProQuest® account. By using ProQuest CrossLinks, your library patrons have seamless integration from searching in ProQuest to other sources of full text that your library may have access to. ProQuest CrossLinks supports the use of a static URL to access resources or it can dynamically create URL's based on article level information.

The CrossLinks and Library Holdings tab simplifies the process for administering links in the Local Administrator (LAD) interface. 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.

Using the CrossLinks and Library Holdings tab you can quickly:

- Apply predefined links for popular services such as SFX and linking partners to all titles, a group of titles, or an individual title.
- Create custom predefined links to their various electronic resources and apply these links to all titles, a group of titles, or an individual title.
- Quickly associate icons and text labels with predefined links.
- Search, filter and sort titles by name, ISSN, publisher, etc.
- Quickly upload linking assignments for multiple titles.

### What Are CrossLinks?

The CrossLinks and Library Holdings tab lets you quickly create links to connect your ProQuest account to external resources.

There are six different types of links you can work with.

#### Custom

Lets you create a CrossLink for collections you subscribe to such as an OPAC.

#### A-Z List

Lets you create a CrossLink 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. Example of an A-Z List: Journal Linker.

#### Link Resolver

Lets you create a CrossLink to a Link Resolver—an application that receives an incoming OpenURL and translates it to a target specific URL. Examples of Link Resolvers: SFX, Article Linker, LinkFinder, WebBridge.

#### E-Journal Site

Lets you create a CrossLink to an E-Journal Provider—services that provide access to electronic journals. Examples of E-Journal Sites: CrossRef, Injenta, Injenta Select.

#### Document Delivery

Lets you create a CrossLink to a Document Delivery service, such as an Interlibrary Loan service. Examples of Document Delivery services: OCLC ILLiad, Infotrieve Gateway (ILL).

#### Online Public Access Catalog (OPAC)

Lets you quickly create a CrossLink to OCLC WorldCat.

### Which Link to Use?

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

### Adding CrossLinks to All Titles vs. Selected Titles

You can add CrossLinks to all titles in ProQuest, or to selected titles. This lets you customize your account by applying CrossLinks to only those titles you subscribe to, or to all articles available within ProQuest.

## Add a New CrossLink Overview

Follow these steps to add a new CrossLink:

- 1 Make sure you are on the **CrossLinks and Holdings, Configure CrossLinks** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **CrossLinks** tab is selected.
  - Or, select **Configure CrossLinks** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Add a New CrossLink**.  
You see the **Add a New CrossLink** page.
- 4 Select the type of CrossLink you are adding.  
The page you see depends on the type of CrossLink you are adding.
- 5 Enter the required information for the CrossLink.
- 6 Click **Done** to add the new CrossLink.

## Delete a CrossLink

Follow these steps to delete a CrossLink:

- 1 Make sure you are on the **CrossLinks and Holdings, Configure CrossLinks** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **CrossLinks** tab is selected.
  - Or, select **Configure CrossLinks** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Edit Settings** next to the CrossLink you want to delete.  
You see the CrossLinks Settings page.
- 4 Click **Delete CrossLink** to delete the CrossLink.  
You will see a pop up asking you to confirm the deletion.
- 5 Click **OK** to delete the CrossLink and return to the CrossLinks and Library Holdings page.

## Sorting CrossLinks

Click the up-pointing arrow next to a column header to sort the CrossLinks in ascending order, based on that column. For example, click the up-pointing arrow next to Link Name to view the CrossLinks sorted alphabetically by link name.

Click the down-pointing arrow next to a column header to sort the CrossLinks in descending order, based on that column. For example, click the down-pointing arrow next to Link Name to view the CrossLinks sorted in reverse alphabetical order by link name.

## Edit Settings for a CrossLink

- 1 Make sure you are on the **CrossLinks and Holdings, Configure CrossLinks** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **CrossLinks** tab is selected.
  - Or, select **Configure CrossLinks** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Edit Settings** next to the CrossLink you want to modify.  
You see the CrossLinks Settings page for the type of CrossLink you are editing.
- 4 Make the changes desired.
- 5 Click **Done** to save the changes and return to the CrossLinks and Library Holdings page.

## ***Adding/Updating Selected Titles for a CrossLink***

- 1 Make sure you are on the **CrossLinks and Holdings, Configure CrossLinks** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **CrossLinks** tab is selected.
  - Or, select **Configure CrossLinks** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **View/Update Selected Titles** next to the CrossLink you want to modify.  
You see the **Select Titles** page.
- 4 Enter the search information for the desired title(s) and click **Search**.  
You see the **Select Holdings** page.
- 5 To add links, check the titles desired and click **Add Links to Marked Items**.  
To remove links, check the titles no longer desired and click **Remove Links from Marked Items**.
- 6 Click **Done**.

## Creating a Custom Link

You can create a custom, predefined link for collections you subscribe to such as OPAC. This lets you use the power of the flexible metadata information in CrossLinks, and apply the links to multiple titles quickly and easily. To create a custom link, follow these steps:

- 1 Make sure you are on the **CrossLinks and Holdings, Configure CrossLinks** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **CrossLinks** tab is selected.
  - Or, select **Configure CrossLinks** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Add a New CrossLink**.  
You see the **Add a New CrossLink** page.
- 4 Click **Custom** from the available link types.  
You see the **CrossLink Settings: Custom Link** page.
- 5 Enter the Local Administrator Label. This is the text that will appear next to the link within LAD.
- 6 Select the titles to which you want to add the link.
  - Select **All ProQuest Titles** to apply the link to all ProQuest titles.
  - Select **Customized list of individual titles** to apply the link to selected titles. You will then need to click **Select Titles** to apply the link to individual titles.
- 7 Enter the **URL** to the resource in the URL field. This must be a fully qualified URL and it must start with `http://` or `https://`.  
If necessary, add any variables required to the URL. This information should be provided by the linking partner.  
Note: When you click the buttons to add a variable, this information is added at the end of the URL, not where you place the cursor.
- 8 Enter the **Link Text**. This is the label that users will see within ProQuest. The maximum length for this text is 76 characters.
- 9 If you want to link to an icon for the collection, enter the URL in the **Custom URL field**. (Your icon must be in GIF format and must measure 20 by 88 pixels.)

- 10 Select when to display the CrossLink custom logo.

These options let you choose whether to display the custom logo instead of the "find a copy" message on the Results Page.

Note: It is only possible to display one type of CrossLink graphic on the Results page. This means that once you select to display this CrossLink graphic, this option will not appear for any other CrossLinks you may create. If this option does not appear for this CrossLink, it means that a graphic has been enabled for another CrossLink. Return to the **CrossLinks and Holdings, Configure CrossLinks** page and check the current CrossLinks for the one flagged (icon appears on results page). You will need to turn this graphic off (Do NOT display) and then return to this CrossLink to enable this graphic.

- **Do NOT display** to display the find a copy message.
- **Display for ALL articles** to always display the custom logo.

- 11 Click **Done** to create the new CrossLink.

Or, click **Delete CrossLink** to remove this link information from the database.

Or, click **Cancel** to return to the CrossLinks and Library Holdings tab without making any changes.

Or, click **Select Titles** to apply the link to individual titles. (See [View/Update Selected Titles for a CrossLink](#) for information on adding titles.)

## Creating a Link for an ejournal

You can create a CrossLink for an ejournal provider, such as CrossRef, Ingenta, Ingenta Select, JSTOR, OCLC FirstSearch OpenURL, and SwetsWise. Follow these steps:

- 1 Make sure you are on the **CrossLinks and Holdings, Configure CrossLinks** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **CrossLinks** tab is selected.
  - Or, select **Configure CrossLinks** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Add a New CrossLink**.  
You see the **Add a New CrossLink** page.
- 4 Click the desired ejournal provider from the available link types.  
You see the **CrossLink Settings:** page for the desired ejournal provider.
- 5 Select the titles to which you want to add the link.
  - Select **All ProQuest Titles** to apply the link to all ProQuest titles.
  - Select **Customized list of individual titles** to apply the link to selected titles. You will then need to click **Select Titles** to apply the link to individual titles.
- 6 Select the **CrossLinks Display Options**.
  - Select **Use custom graphic and text**.
  - Click **Add graphic**.  
You see the **Edit CrossLinks Custom Graphic** page.
  - Click **Browse** and navigate to your graphic.  
The graphic must be 88 by 20 pixels, and a gif or jpg image.
  - Click **Upload** to upload the graphic.
  - If you want, enter the desired link text. This will appear on the **Document View** page, next to the graphic. The text maximum is 76 characters.
  - If you want, enter the desired Alt text. This will appear when the user has graphics turned off. The text maximum is 20 characters.
  - Click **Save** to save the changes.
- 7 Click **Done** to create the new CrossLink.  
Or, click **Delete CrossLink** to remove this link information from the database.

Or, click **Cancel** to return to the CrossLinks and Library Holdings tab without making any changes.

## Creating a Link for a non-ejournal

You can create a crosslink for a non-ejournal provider, such as SFX, OCLC Illiad, and others. Follow these steps:

- 1 Make sure you are on the **CrossLinks and Holdings, Configure CrossLinks** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **CrossLinks** tab is selected.
  - Or, select **Configure CrossLinks** from the Quick Picks pull-down menu.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Click **Add a New CrossLink**.  
You see the **Add a New CrossLink** page.
- 4 Click the desired linking partner from the available link types.  
You see the **CrossLink Settings:** page for the desired linking partner.
- 5 Select the titles to which you want to add the link.
  - Select **All ProQuest Titles** to apply the link to all ProQuest titles.
  - Select **Customized list of individual titles** to apply the link to selected titles. You will then need to click **Select Titles** to apply the link to individual titles.
- 6 Enter the **Base URL to Journal Linker**. This must be a fully qualified URL and it must start with http:// (or https://).
- 7 Select the **CrossLinks Display Options**.
  - Select **Use custom graphic and text**.
  - Click **Add graphic**.  
You see the **Edit CrossLinks Custom Graphic** page.
  - Click **Browse** and navigate to your graphic. The graphic must be 88 by 20 pixels, and a gif or jpg image.
  - Click **Upload** to upload the graphic.
  - If you want, enter the desired link text. This will appear on the **Document View** page, next to the graphic. The text maximum is 76 characters.
  - If you want, enter the desired Alt text. This will appear when the user has graphics turned off. The text maximum is 20 characters.
  - Click **Save** to save the changes.
- 8 Click **Done** to create the new CrossLink.

Or, click **Delete CrossLink** to remove this link information from the database.

Or, click **Cancel** to return to the CrossLinks and Library Holdings tab without making any changes.

## Searching Individual Holdings Records

You can search the individual holdings to find specific records. This makes it easy to locate the titles to which you want to add holding information, or to add a CrossLink. Follow these steps:

- 1 Make sure you are on the **CrossLinks and Holdings, Search/Edit Individual Holdings Records** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **Search/Edit Individual Holdings Records** tab is selected.
- 2 If you have access to multiple Accounts or clients, select the desired **Account** from the pull-down menu located above the tabs. (If there is only one client available, the Account is static text, rather than a pull-down).
- 3 Type a word, phrase, or ISSN in the **Search for publications by title, ISSN, or publisher field** (this field is not case sensitive) and select whether you are searching for a publisher, title, or ISSN.

You can use the question mark (?) as a wildcard character to find all titles that contain a specific word, partial word, or phrase.

For example:

  - PC Will find publications titled PC.
  - PC? Will find publications such as PC Times and PC Today.
- 4 Select where to search:
  - **ProQuest Titles** will search all titles in ProQuest Information and Learning Company's collection.
  - **Research Collections Titles** will search the professional research collections only (AGRICOLA , CINAHL , ERIC , MEDLINE , PsycINFO , ProQuest Historical Newspapers).
  - **Combined Titles** will search both the ProQuest Titles and the Research Collections Titles.
- 5 Select how to limit your search:
  - To limit your search to titles for which the selected client has a subscription, check the **titles included in your ProQuest subscription** box.
  - To limit your search to titles for which you have set up library holding settings, check the **titles with library holdings assigned** box.
  - To limit your search to titles that are not available in full text format, check the **titles included in your ProQuest subscription** box.
- 6 Select your sort options:

- Publication Title will sort by the article title.
- ISSN will sort by the ISSN associated with the publication.
- Publisher name/ISSN will sort by publisher's name, then by ISSN.
- Publisher name/title will sort by publisher's name, then by publication title.

### 7 Click **Search**.

You will see the **Search/Edit Holdings Records Results** page.

You can now make changes the holding information for multiple titles, or change the holding information for an individual title.

### Search Results Limitations

Your search results are limited to 1,000 titles. If your search returns more than 1,000 titles, you will see an error message prompting you to refine your search.

### **Delete all Holdings for a Title**

- 1 Locate the publication you want to modify, and click on the publication title to view the **CrossLink Settings: Edit the Publication Title Details** page. . (Follow the steps in [Searching Individual Holdings Records.](#))
- 2 Click **Delete all holdings for this title.**

### **Add a Title Specific Link to a Title**

Follow these steps to add links to electronic resources:

- 1 Locate the publication you want to modify, and click on the publication title to view the **CrossLink Settings: Edit the Publication Title Details** page. . (Follow the steps in [Searching Individual Holdings Records.](#))
- 2 Select the desired link from the **Select a type of title-specific link** to add pull down menu. This menu will list any ProQuest defined links and any customer defined links that have not been assigned globally, and the Title Specific option.
- 3 Click **Add Link.**  
The new link you've added will appear after the title specific option.

### **Remove a title specific link**

Follow these steps to remove links to electronic resources:

- 1 Locate the publication you want to modify, and click on the publication title to view the **CrossLink Settings: Edit the Publication Title Details** page. . (Follow the steps in [Searching Individual Holdings Records.](#))
- 2 Locate the desired link from the **Title Specific Links** area. Click **Remove.**

The title specific link will be removed.

### **Add Information on Physical Holdings to a Title**

- 1 Locate the publication you want to modify, and click on the publication title to view the **CrossLink Settings: Edit the Publication Title Details** page. . (Follow the steps in [Searching Individual Holdings Records.](#))
- 2 Check the appropriate holding type(s).
- 3 Update the **Start Date** and **End Date** fields to specify your library's coverage of the title. These fields store and display dates in a YYYYMMDD format. For example, 19980901 to 20000901.  
Note: Entering 00 (double zero) is not a valid date for the month (mm) or day (dd) fields. For monthly publications, type 01 for the day, and for yearly publications, type 01 for both the month and day. For example, type 19960901 to represent "September 1996," and type 19960101 to represent "1996."
- 4 Update the **Start Volume, Start Issue, End Volume, and End Issue** fields.
- 5 Use the **Note** field to describe specifics about the title, such as its location in your library, and whether certain years of coverage are only available on microfilm, paper, or CD-ROM. The length of the text can be up to 2000 characters. Do not use this field to enter URLs.
- 6 Click **Save.**

### **Uploading Holdings in ProQuest Format**

This option lets you add or update a group of holdings records to alternate sources within your institution by using an ASCII or text file.

Additional information on file format is available in the Library Holdings Quick Print Guide, located in the Technical Support Center of the Training Resource Center (<http://training.proquest.com/trc/lad/ladqrg.htm>).

Follow these steps to upload your library holdings:

- 1 Make sure you are on the **CrossLinks and Holdings, Upload Holdings File** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **Upload Holdings File** tab is selected.
  - Or, select **Edit/upload your holdings and CrossLinks** from the Quick Picks menu.
- 2 Select **ProQuest Format** from the **Select upload file format** menu.
- 3 Click **Browse** next to the **File for upload** field, navigate to the file you are uploading, and click **OK**.
- 4 Click **Upload**.

### **Uploading Holdings in MARC Format and MARCXML Format**

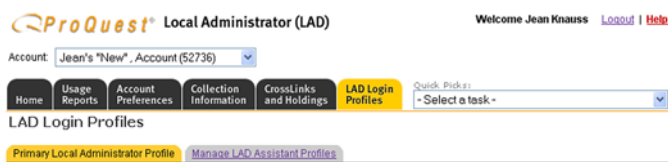
This option lets you add or update a group of holdings records to alternate sources within your institution by using an ASCII or text file.

Additional information on file format is available in the Library Holdings FAQ, located in the Technical Support Center of the Training Resource Center

Follow these steps to upload your library holdings:

- 1 Make sure you are on the **CrossLinks and Holdings, Upload Holdings File** page:
  - Click the **CrossLinks and Holdings** tab, and make sure the **Upload Holdings File** tab is selected.
  - Or, select **Edit/upload your holdings and CrossLinks** from the Quick Picks menu.
- 2 Select **MARC Format** or **MARCXML Format** from the **Select upload file format** menu.
- 3 Select whether you are uploading a list of records to add or delete from your holding.
- 4 If the file contains records to be added to your library holdings:
  - If you are uploading a batch of holdings for the same electronic resource, enter the **LAD Link Type Label**.
  - Click **Browse** next to the **File for upload** field.
  - Navigate to the file you want to upload and click **OK**.
- 5 If the file contains records to be deleted from your library holdings:
  - If you are uploading a batch of holdings for the same electronic resource, enter the **LAD Link Type Label**.
  - Click **Browse** next to the **File for upload** field.
  - Navigate to the file you want to upload and click **OK**.
- 6 Click **Upload**.

## LAD Login Profiles



### Add a LAD Assistant Profile

To add a new LAD assistant profile, follow these steps:

- 1 Make sure you are on the **LAD Login Profiles, Manage LAD Assistant Profiles** page:
  - Click the **LAD Login Profiles** tab, and make sure the **Manage LAD Assistant Profiles** tab is selected.
  - Or, select **Create/Modify a LAD Assistant** from the Quick Picks menu.
- 2 Click **Add a New LAD Assistant Profile**. You see the **Add a New LAD Assistant Profile** page.
- 3 Enter the following information:
  - **Description** Enter the name or function of the administrator (try to keep the name short).
  - **Password** Enter a password for this account.
  - **Functional Area** Check the areas to which you want to give the account access.
- 4 Click **Save**. You will return to the LAD Assistant Profiles page.
- 5 Scroll to the new account and write down the **Screen Name** and **Password** for the new account to give to the LAD Assistant.

### Manage Existing LAD Assistant Profiles

This section lets you edit your LAD Assistant profiles. To change a profile, follow these steps:

- 1 Make sure you are on the **LAD Login Profiles, Manage LAD Assistant Profiles** page:
  - Click the **LAD Login Profiles** tab, and make sure the **Manage LAD Assistant Profiles** tab is selected.
  - Or, select **Create/Modify a LAD Assistant** from the Quick Picks menu.
- 2 In the **Manage Existing LAD Assistant Profiles** section, locate the profile you want to modify.
- 3 Edit the following information:
  - **Description** The name or function of the administrator (try to keep the name short).
  - **Password** The password for this account.
  - **Functional Area** The areas to which you want to give the account access.
- 4 Click **Save** to modify the profile.

### Delete a LAD Assistant Profile

To delete a LAD Assistant Profile, follow these steps:

- 1 Make sure you are on the **LAD Login Profiles, Manage LAD Assistant Profiles** page:
  - Click the **LAD Login Profiles** tab, and make sure the **Manage LAD Assistant Profiles** tab is selected.
  - Or, select **Create/Modify a LAD Assistant** from the Quick Picks menu.
- 2 In the **Manage Existing LAD Assistant Profiles** section, locate the profile you want to delete.
- 3 Click **Delete** in the Action column.

## **About Local Administrator Login Profiles**

Your Local Administrator Profile lets you set the properties for your LAD Administrator Account.

### **Set Contact Information**

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.

To change this information:

- 1 Make sure you are on the **LAD Login Profiles, Primary Local Administrator Profile** page:
  - Click the **LAD Login Profiles** tab, and make sure the **Primary Local Administrator Profile** tab is selected.
  - Or, select **Change Your LAD Admin Password** from the Quick Picks menu.
- 2 In the **Contact Information** section, enter or edit your contact information
- 3 Click **Save**.

## **Change Account Password**

- 1 Make sure you are on the **LAD Login Profiles, Primary Local Administrator Profile** page:
  - Click the **LAD Login Profiles** tab, and make sure the **Primary Local Administrator Profile** tab is selected.
  - Or, select **Change Your LAD Admin Password** from the Quick Picks menu.
- 2 In the **Change Password** section, enter your current password in the **Current password** box.
- 3 Enter your new password in the **New password** box.
- 4 Re-enter the password in the **Confirm new password** box.
- 5 Click **Save**.