

Account Preferences

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

Account Preferences

Name: Jean's "New", Account [Rename](#)

Account/Client ID: 52736

Authentication Search Interface Settings Branding Options Create Links to ProQuest Databases

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**.

You see a page showing the new account and password.
- 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.