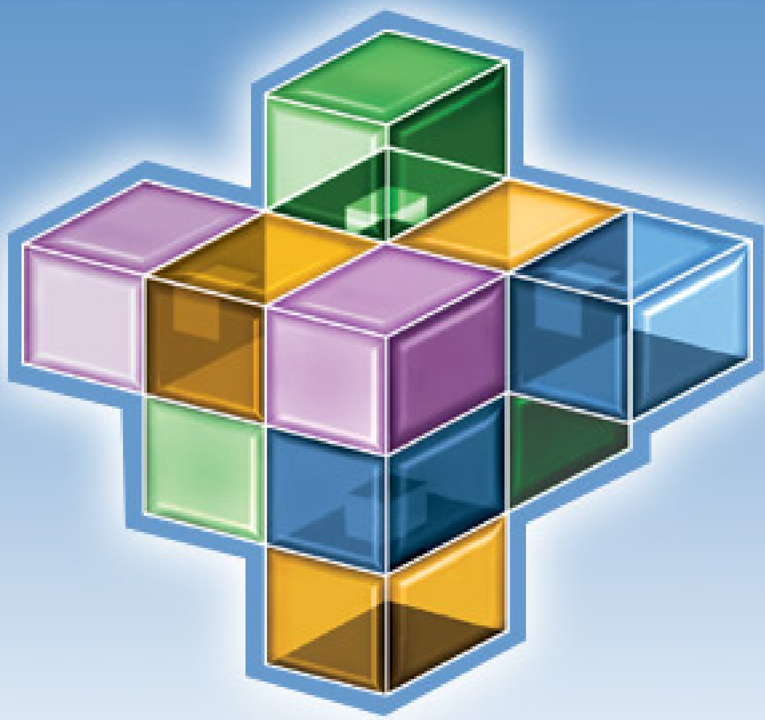
EBSCO*admin*
User Guide



EBSCO
ADMIN

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What is EBSCO*admin*?

EBSCO*admin* is an online administrative application for libraries accessing publication services via the Internet. This program provides EBSCO*host* library administrators with tools to customize their EBSCO*host* interface.

The following are just some of the customization options that EBSCO*host* administrators have:

- Select the specific EBSCO*host* database offerings users will have access to. Different sets of users (as determined by their user group and user profile) can be assigned different databases from among those licensed by the library.
- Create collections of publications held by the library, and assign specific messages to indicate which items, referenced by search results, are held in the library and which are not.
- Customize search limiters to appear on the EBSCO*host* search screen. Limiters can also include local collections, thereby allowing a user to view only items available in the library.
- Create links from EBSCO*host* record displays to the library catalog or other Web-based tools, such as LinkSource, SFX or JSTOR.

EBSCO*admin* provides tools to allow the EBSCO*host* administrator to generate usage statistics reports, manage authentication, import files and more.

Note: *Throughout this document, the terms "EBSCOadmin user" and "you" are used to indicate the person within the library who uses EBSCOadmin to set up the options (the library's EBSCOhost administrator). The term "end user" describes the person searching EBSCOhost.*

Note: *Reference is made to "consortium only." If a library consortium purchases EBSCOhost for a number of libraries, each library will be set up with its own account. There will also be an overriding consortium account. The consortium EBSCOadmin user has additional rights and privileges.*

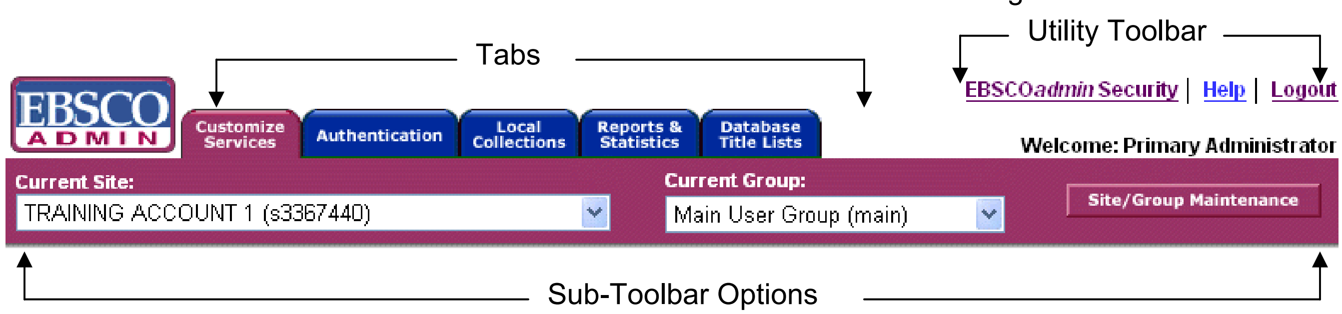
Accessing EBSCO*admin*

EBSCO*admin* is accessed via http://eadmin.epnet.com.

EBSCO*admin* supports both Internet Explorer version 5.5 or higher and Netscape version 6.0 or higher.

Using the Toolbar

EBSCO*admin* offers a toolbar for functions that are available at all times during a session.



Using the Utility Toolbar

- **EBSCO*admin* Security** – This option allows administrators to create new administrators and change the roles of the administrators. Complete functionality is explained below.
- **Help** – This link opens the Online Help Manual.
- **Logout** –Click on this link to log out of EBSCO*admin.*

EBSCOadmin Security – Consortium Administrators

Consortium administrators can create EBSCO*admin* IDs with specific assigned roles, providing the flexibility to allow a staff member to perform certain tasks without giving them rights to all parts of *EBSCOadmin.* A consortium administrator will be able to add users to all sites and globally change the roles for every user in the consortium, simultaneously.

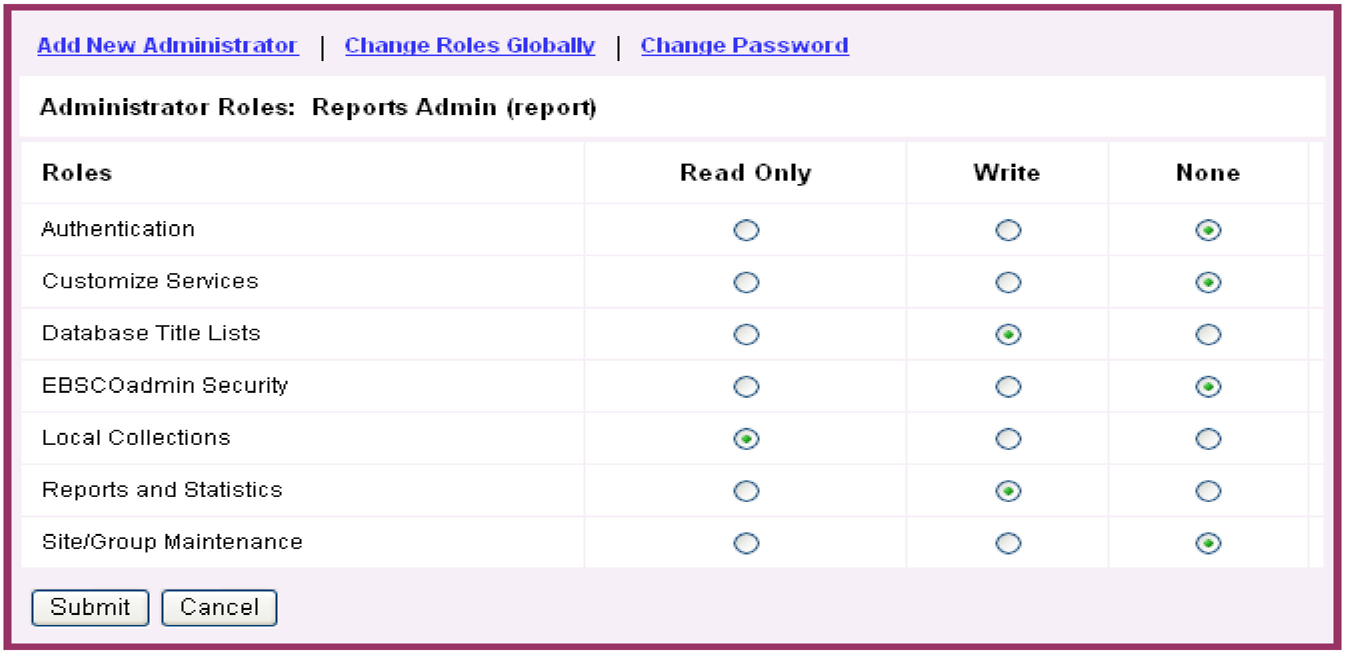
Note: *A consortium/library administrator can restrict access to EBSCOadmin Security. If this has been done, the link is replaced with a* ***Change Password*** *link.*

Add New Administrator | Change Roles Globally | Change Password

Display Name	User ID	Roles	Delete
Reports Admin	report	Go	X
Primary Administrator	ea	Go	X
Marcie Brown	Marcie	Go	X

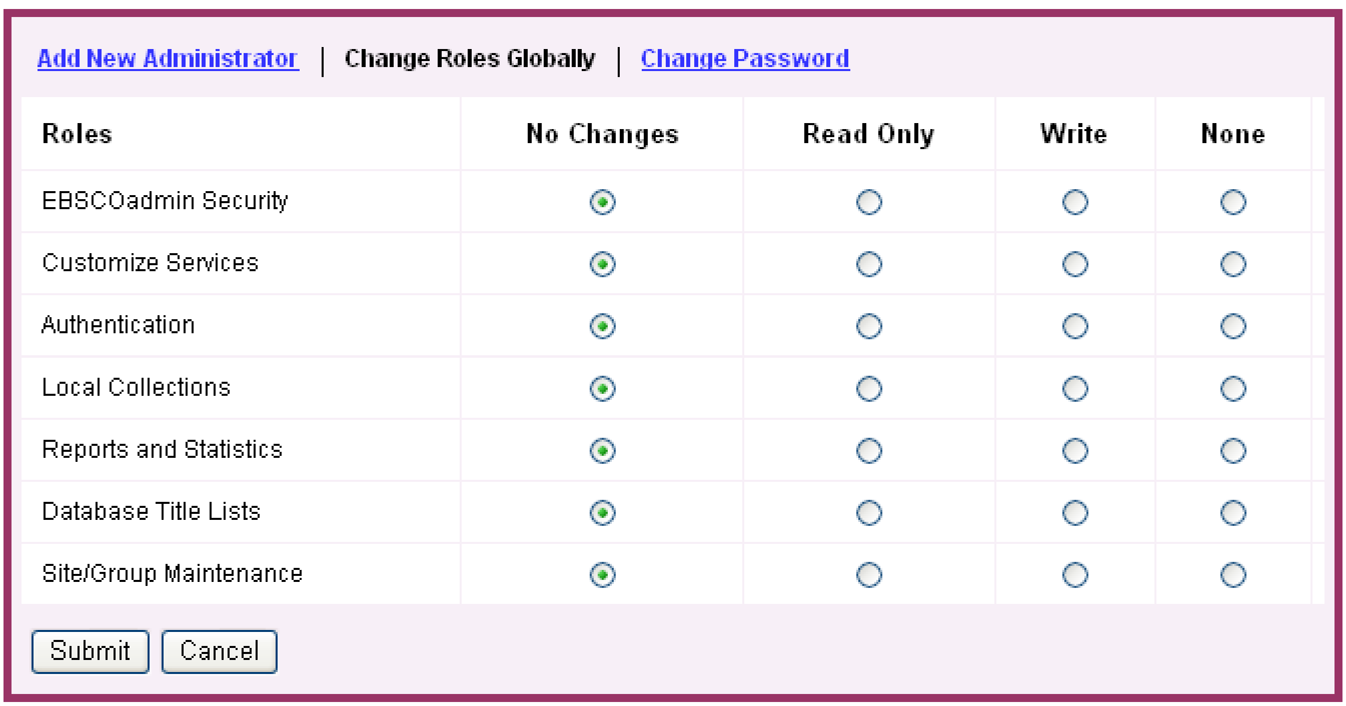
Adding a new administrator:

1. From the Utility Toolbar, click the **EBSCO*admin* Security** link.
2. Click the **Add New Administrator** link.
3. Choose the type of administrator that is being created, **Consortium** or **Site.**
4. If you are creating a Site Administrator, choose **Site** and proceed to the next step. If choosing **Consortium**, proceed to step 6.
5. Choose the site from the Site drop-down list.
6. In the text entry fields, enter the **Display Name**, **User ID**, **Password** and **E-mail Address**.
7. Click **Submit**. The site list appears with your new administrator listed.
8. Choose the **Go** link under the **Roles** column for the administrator you just created.
9. Choose which tabs this administrator has rights to.
   - **Read Only** – The administrator will have access to this tab but cannot make any changes.
   - **Write** – The administrator has full edit rights for this area.
   - **None** – The tab does not appear when the administrator logs in.

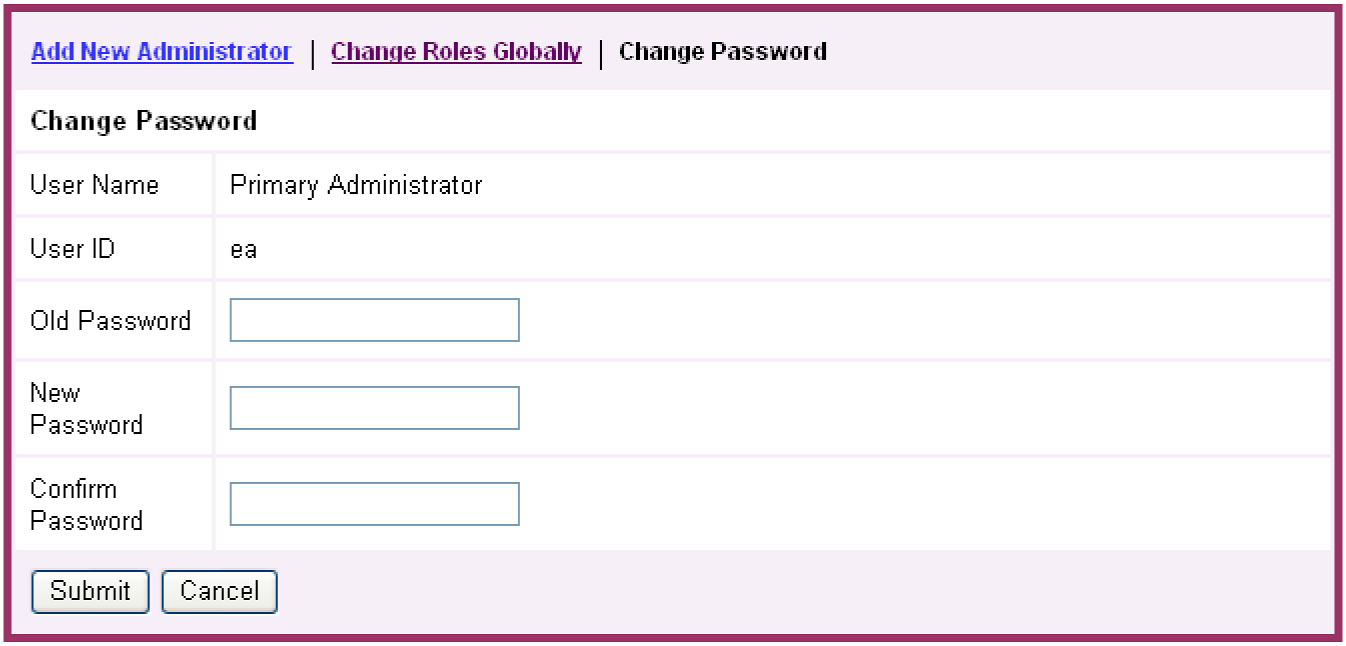


10. Click **Submit**.

You may optionally change roles for all administrators at one time by choosing the **Change Roles Globally** link.



From the **Change Password** link, you can change your password for access to EBSCO*admin*.



EBSCOadmin Security – Library Administrators

Library administrators can create an EBSCO*admin* ID/PW with specific assigned roles, providing the flexibility to allow a staff member to perform certain tasks without giving them rights to all parts of *EBSCOadmin.*

Adding a new administrator:

1. From the Utility Toolbar, click the **EBSCO*admin* Security** link.
2. Click the **Add New Administrator** link.
3. In the text entry fields, enter the **Display Name**, **User ID**, **Password** and **E-mail Address**.
4. Click **Submit**. The site list appears with your new administrator listed.
5. Choose the **Go** link under the **Roles** column for the administrator you just created.
6. Choose which tabs this administrator has rights to.
   - **Read Only** – The administrator will have access to this tab but cannot make any changes.
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7. Click **Submit**.

You may optionally change roles for all administrators at one time by choosing the **Change Roles Globally** link.

From the **Change Password** link, you can change your password for access to EBSCO*admin.*

Sub-Toolbar Options – Consortium only

As a consortium administrator, you can choose the site you would like to change settings for by choosing the site from the **Current Site** drop-down list. You can also choose which user group to work with from the **Current Group** drop-down list.

From the **Site/Group Maintenance** button you can modify and create CustomLinks, set up different types of branding for select EBSCO*host* screens, modify the Select Service Screen, e-mail a site list, upload and change user defined fields.

Note: *CustomLinks, Branding, Select Service, Proxy Server and User Defined Fields can be set at the consortium or site level.*

Consortium Tab

From the Consortium Tab you can e-mail a site list, upload User Defined Fields, change User Defined Column Headings and maintain CustomLinks, Branding, Select Service and User Defined Fields.


Consortium | Site | Group

E-mail Site List | Upload User Defined Field List | Change User Defined Column Headings

Site Name	Site ID	CustomLinks	Branding	"Select Service"	User Defined Fields
CHRIS GORMAN TRAINING ACCOUNT	s3359558	Go	Go	Go	Go

E-mail Site List

From the Consortium and Site Sub-tabs a consortium administrator can choose to e-mail a list of sites.

To E-mail a Site List:

1. Click the **E-mail Site List** link from either the Consortium or Site Sub-tabs
2. Enter the **E-mail Address** where you want to send the report.
3. **Output format** - Select whether the output format for the report file should be comma delimited or tab delimited.
4. **Report Name** – The default is Site List; you can change the name by editing the information in the text entry field.
5. **Select Fields** – Choose the fields that you want to include in the e-mail: Site ID, Site Name, User Defined Field 1, or User Defined Field 2.
6. Click **Submit**.

Upload User Defined Field List

A consortium can assign a category to each library in their consortium, using the User Defined Fields option. For example, you may want to define a site as a community college, a university or a public school. Once these have been defined, you can choose to run reports based on the User Defined Fields.

To Upload a User Defined Field List:

1. Click the **Upload User Defined Field List** link from either the Consortium or Site Sub-tabs.
2. In the **Field Delimiter** field, you can enter any single character, a space, or a tab space.
3. In the **Text Delimiter** field, you can enter a text delimiter (such as ") used to enclose the fields containing embedded commas.

Note: *The field delimiter and text delimiter are needed to determine how the information is separated in the file.*

4. In the **Site ID** field, enter the column number of the site ID field in your text file. Do not enter a literal text value for this field. Your text file must contain the site ID field.
5. In the **File Location** field, enter the location where the upload file is located. Click the **Browse** button to navigate to the correct location.
6. If you want an e-mail sent upon completion, enter the **e-mail address** in the **Notify via E-mail upon Completion** field.
7. Click **Submit**. The list of User Defined Fields will be uploaded.

Change User Defined Column Headings

You can change the headings of the User Defined Fields from the default by choosing the **Change User Defined Column Headings** link from either Consortium or Site Sub-tabs. Enter the text you prefer and click the **Submit** button.

User Defined Fields

The User Defined Field option is where you can manually enter the information for that site, for example, Public Library. Next to the Site name choose the **Go** link and enter the information next to the corresponding field.

CustomLinks

Administrators can create CustomLinks to LinkSource, the library catalog, interlibrary loan forms, JSTOR, jake, as well as other services. Once you create these links you can apply them to your profiles you have created.

Choose the **Go** link under the CustomLinks column. Then choose the **Add New CustomLink** link followed by the **Create New Custom Link** radio button, and click **Continue.**

Enter Basic Settings for the CustomLink:

1. In the **Link Name** field, enter the name that will be displayed on the list of available CustomLinks.
2. From the **Category** drop-down list, select the type of link you are creating.
3. In the **Link Text** field, enter the text that appears on the citation as the link. (For example: "Check library catalog for holdings.")
4. In the **Mouse-over Text** field, enter the text that will appear when a mouse is placed over the image.
5. To use an image as the link icon, in the **Link Icon** field, enter the URL where the image is located.

6. In the **Base URL** field, enter the outgoing URL for the link. (This field and Query String replace URL Mask.)
7. In the **Query String** field, enter the query or set of parameters to be appended to the outgoing URL for the link. (The actual URL should be entered in the Base URL field. This field and Base URL replace URL Mask.)

Enter Advanced Settings for the CustomLink:

1. If there are fields in the URL mask that must appear in the record before the link can show, enter them in the **Mandatory Fields** text entry field. This is a space-delimited list.
2. To customize the browser window in which your ILS information appears, enter the appropriate properties separated by commas in the **Window Properties** field.
3. Common properties include the width and height of the window and if a toolbar and/or scroll bar should appear. For example, an entry could be: *width=460,height=500,menubar=no,status=yes, scrollbars=yes,resizable=yes.*
4. **Display in New Window** – Using the appropriate radio button, indicate whether you want the link to open in a new window. If you are opening the link in a new window, enter the name in the **Window Name** field.
5. **Hide Link if Full Text** – Select **yes** if EBSCO*host* should hide the link if the current record has full text (ASCII, PDF or Linked).
6. **Show Link** – This option dictates when a link is going to appear. You can have the link display **Always**, **If Item is in Collection** or **If Item is *not* in Collection**.
7. **Local Collections for Filter** – Enter the name of the local collection used to verify that the item is applicable for this link. To select more than one, press the Control (Ctrl) key while highlighting the selections.
8. **Show on Result List** – Select **yes** if this link should appear on the EBSCO*host* Result List.
9. **Show on Publication List** – Select **yes** if this link should appear with results on the EBSCO*host* Publication Result List, Publication Overview and Publication Details Screens.
10. **Show on Detailed Display** – Select **yes** if this link should appear on the EBSCO*host* Detail Display for an article.
11. **Target Uses Ref URL** – If the link target uses a referring URL, click **yes**.
12. **Use Proxy Server** – Indicate whether a proxy server is in use.
13. **Primary/Secondary Proxy** – Any proxy definitions the consortium administrator has set up will appear in the drop-down lists.
14. **Instructions for Sites** – If you belong to a consortium, any notes from the consortium administrator would appear in this field.

Enter LinkSource Settings for the CustomLink:

1. Select **yes** to indicate that you want to show the link you have created on LinkSource.
2. In the **LinkSource Service ID** field, enter the optional Service ID of the service the link represents.
3. In the **Authentication Helper Text** field, enter any information that explains how to use the link. For example, the library could include instructions on how to log in to a product, or provide the user name and password, if it is necessary to successfully follow a link.

4. If helper text should be hidden when a specific authentication type is used, select the authentication type from the list.
5. When you have finished making your selections on this page, click **Submit**. When you submit your changes, the CustomLinks are available and can be applied to your profiles.

Proxy Settings

Also under CustomLinks is the ability to create and maintain proxy server settings. This allows you to define a proxy server that can be included with links. These links can be for persistent links, links to catalogs and other links available on LinkSource.

To add a proxy server:

1. Click the **Site/Group Maintenance** button in the toolbar. Click the either the **Consortium** or **Site** Sub-Tabs.
2. Click the **Go** Link below Custom Links for the site you want to work with.
3. Click the **Setup/Maintain Proxies** link then click the **Add New Proxy Definition** link.
4. In the **Proxy ID** field, enter the unique identifier for the proxy.
5. In the **Proxy Name** field, enter the name the library assigns to the proxy server.
6. In the **Proxy URL Mask** field, enter the base URL used to proxy resources. For example, *http://ezproxy.myinstitute.edu/login?url={targetURL}* or *http://{targetURLDomain}ezproxy.myinstitute.edu/{targetURLRemainder}*
7. In the **Proxy IP** field, enter the IP address of the proxy server.
8. In the **Proxy Available** field, select whether you want a flag indicating the proxy server is currently available.
9. In the **Proxy Note** field, enter a description of the proxy server and information about managing it.
10. Click **Submit**.

Branding

You may choose to add text and/or graphics to various pages on EBSCO*host.*

Add New Branding:

1. If you are setting up branding for the consortium, click the Consortium Sub-tab. If you are setting up branding for a site, click the Site Sub-tab.
2. Click the **Go** link below Branding for the consortia or an individual site.
3. Click the **Add New Branding** link.
4. Enter a **Branding Version Name** for the branding you are setting up.
5. In the **Type of Text** field, indicate the format for the custom text—select either HTML or Plain Text. If you select plain text, it will be converted to HTML.
6. In the **Enter Custom Text** field, type the custom text that will appear at the bottom of the pages you select.
7. Select the screens on which you want your custom branding to appear. You can select any combination of the following screens:

- Choose Database
- Basic/Refine Search
- Basic/Result List
- Advanced/Refine Search
- Advanced/Search History
- Advanced/Result List

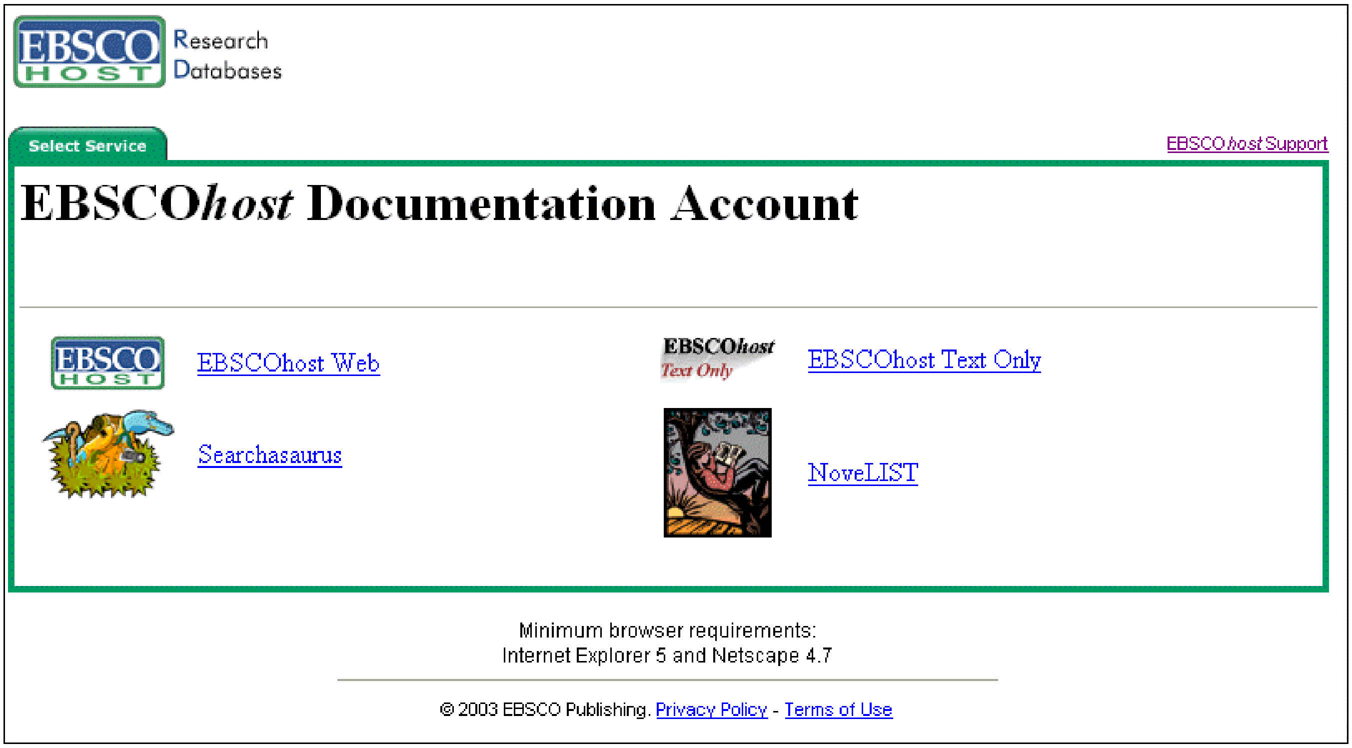
8. If you are setting up branding at the consortium level, you can **Add this branding as the default for all Profiles** of the Current Site, All Sites, or No Sites. If you are setting up branding for a site, you can select this branding as the default for all profiles.
9. When you have finished making your selections on this screen, click **Submit**. The Branding Screen appears with a link to your new branding displayed.

Select Service Screen

Administrators can change the layout and add text to the Select Service Screen. The Select Service Screen is the initial page users may see if you have more than one service from EBSCO Publishing. This can include EBSCO*host*, NoveList and/or Searchasaurus.

To Add a New Select Service:

1. If you are customizing a Select Service Screen for the consortium, choose the Consortium Sub-tab. If you are customizing a Select Service Screen for a site, click the Site Sub-tab.
2. Click the **Go** link below Select Service for the consortium or a specific site.
3. Click the **Add New Select Service** link.
4. In the **Select Service Version Name** field, enter the name for this version of the Select Service Screen.
5. In the **Type of Text** section, choose whether to use HTML or Plain text in the **Enter Custom Text** section.
6. In the **Top Copy Area**, enter a title for the Select Service Screen.
7. In the **Bottom Copy Area**, enter any custom text the library requires.
8. In the **Icon Alignment** (Number of Columns) section, indicate the number of columns on the Select Service Screen. Any graphics you display will be aligned based on the number of columns you select - one, two or three. Below is an example with two columns.



9. **Set this version of Select Service as the default for all groups of: -** If you are administering a consortium, you can assign the version of the Select Service Screen to all groups for the Current Site, All Sites or to No Sites within the consortium.
10. Click **Submit**.

Group Tab

From the Group Tab you can create, copy or delete User Groups. User Groups can represent a department or division that the site administrator can define within EBSCO*admin*. One or more User Groups can be set up to customize access to EBSCO*host* and gather usage statistics for each group.

Adding a New Group:

1. Click the **Add New Group** link.
2. Enter a **Group ID** and **Group Name**. The Group ID can be from 1-10 characters. For example, you could enter a Group ID of **remote** and a Group Name of **Remote Patron Access**.
3. Enter the **Reports E-mail Address** where reports for the group should be sent.
4. When you have finished making your selections on this screen, click **Submit**. The Site/Group Maintenance Screen appears with your new Group ID displayed.

Copying a User Group:

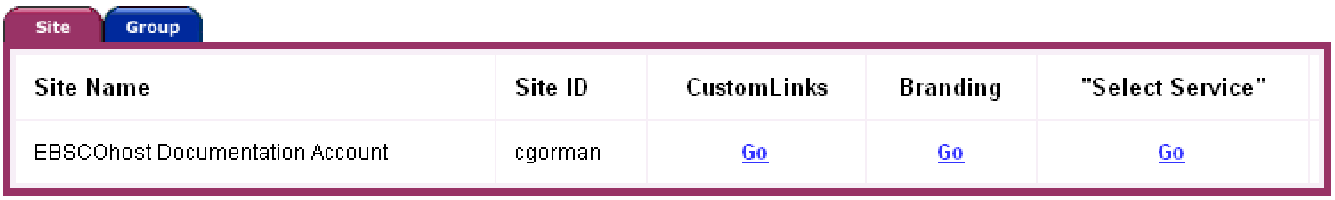
1. Click the **Copy Group** link.
2. In the **Source Info** area, from the **Site** and **Group** drop-down lists select the site and group that you want to copy.
3. In the **Target Info** area, from the **Site** list, select the site(s) to which you want to copy the source's information.

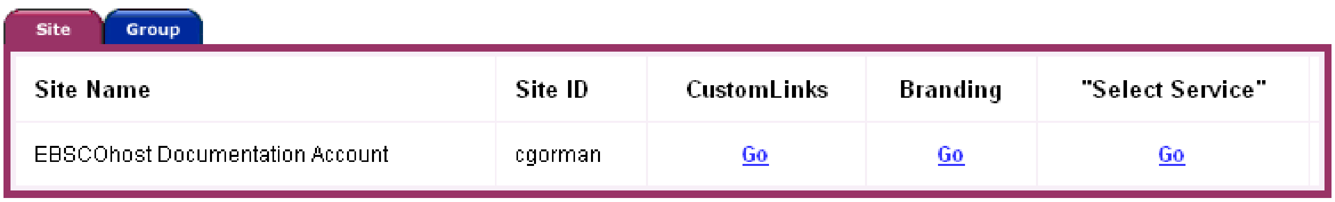
4. When you have finished making your selections on this screen, click **Submit**.

Sub-Toolbar Options – Library Administrators

As a library administrator, you will see only your institution name displayed here. You can choose which user group to work with from the **Current Group** drop-down list.

From the **Site/Group Maintenance** button you can modify and create CustomLinks, set up different types of branding for select EBSCO*host* screens and modify the Select Service Screen.





Site Tab

From the Site Tab you can maintain CustomLinks, Branding and Select Services.

CustomLinks

You can create CustomLinks to LinkSource, the library catalog, interlibrary loan request forms, JSTOR, jake, and other services. Once you create these links, you can apply them to the profiles you have created.

Choose the **Go** link under the CustomLinks column. Then choose the **Add New CustomLink** link followed by the **Create New CustomLink** radio button, and click **Continue.**

Enter Basic Settings for the CustomLink:

1. In the **Link Name** field, enter the name that will be displayed on the list of available CustomLinks.
2. From the **Category** drop-down list, select the type of link you are creating.
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5. In the **Proxy Name** field, enter the name the library assigns to the proxy server.
6. In the **Proxy URL Mask** field, enter the base URL used to proxy resources. For example, *http://ezproxy.myinstitute.edu/login?url={targetURL}* or *http://{targetURLDomain}ezproxy.myinstitute.edu/{targetURLRemainder}*
7. In the **Proxy IP** field, enter the IP address of the proxy server.
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2. Click the **Add New Branding** link.
3. Enter a **Branding Version Name** for the branding you are setting up.
4. In the **Type of Text** field, indicate the format for the custom text—select either HTML or Plain Text. If you select plain text, it will be converted to HTML.
5. In the **Enter Custom Text** field, type the custom text that will appear at the bottom of the pages you select.
6. Select the screens on which you want your custom branding to appear. You can select any combination of the following screens:
   - Choose Database
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   - Basic/Result List
   - Advanced/Refine Search
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7. If you are setting up branding at the consortium level, you can **Add this branding as the default for all Profiles** of the Current Site, All Sites, or No Sites. If you are setting up branding for a site, you can select this branding as the default for all profiles.
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Select Service Screen

Administrators can change the layout and add text to the Select Service Screen. The Select Service Screen is the initial page users may see if you have more than one service from EBSCO Publishing. This can include EBSCO*host*, NoveList and/or Searchasaurus.

To Add a New Select Service:

1. Click the **Go** link below Select Service for the consortium or a specific site.
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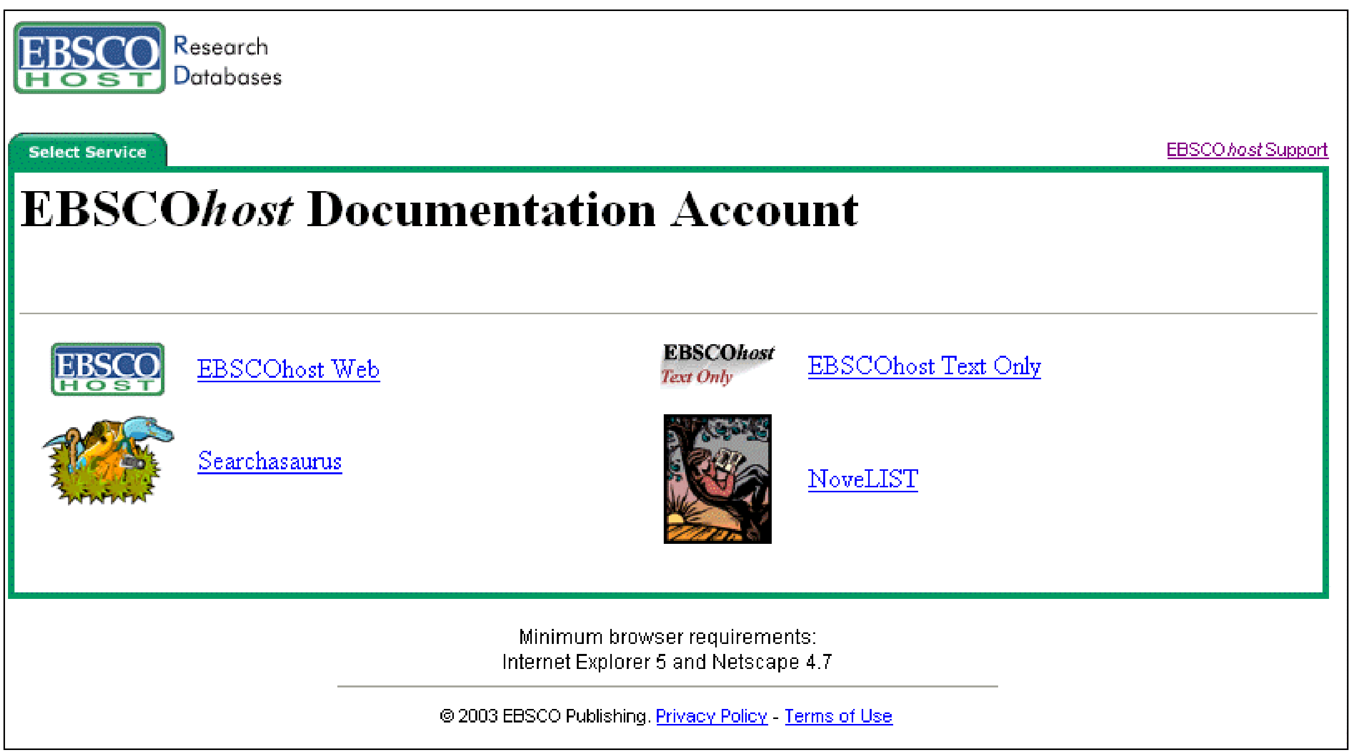

8. **Set this version of Select Service as the default for all groups: -** You can assign this version of the Select Service Screen to all groups or no groups.
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Adding a New Group:

1. Click the **Add New Group** link.
2. Enter a **Group ID** and **Group Name**. The Group ID can be from 1-10 characters. For example, you could enter a Group ID of **remote** and a Group Name of **Remote Patron Access**.
3. Enter the **Reports E-mail Address** where reports for the group should be sent.
4. When finished click **Submit**. The Site/Group Maintenance Screen appears with your new Group ID displayed.

Customize Services – All Administrators

The Customize Services Tab has sub-tabs that group together settings, which will affect a user's EBSCO*host* experience. The sub-tabs are: Searching, Databases, Viewing Results, Linking, Delivery Options, Multilingual Options and Branding.

Note: *The profile listed in the Choose Profile drop-down list is the profile that your changes will affect.*

Profile Maintenance

The **Profile Maintenance** link allows you to modify and create profiles. Profiles define the databases, collections, limiters, search screens and other features end-users see when using EBSCO*host*. You can create multiple profiles for different user groups. Profiles can be maintained, activated or deactivated in the profile maintenance area.

Add a New Profile | Reorder Profiles | Copy Profiles

Sort by Order

Order	Profile ID	Description	Interface	Profile Style	Language	Delete
1	ehost	EBSCOhost Web	EBSCOhost Web	Other	English	X
6	nov	NoveLIST	Novelist	Other	English	X
11	sas	Searchasaurus	Searchasaurus	Other	English	X

To add a new profile:

1. Click the **Profile Maintenance** link, and then click the **Add a New Profile** link.
2. Enter a **Profile ID** and **Description**. For example: If you are setting up a profile to access Academic Search Elite, the profile ID and description could be **asp** and **Academic Search Premier.**
3. Select an interface, a default language, and a style for the profile, and then click **Submit**.

Note: *The default language is used to determine which language the EBSCOhost interface will be.*

4. Click the **Back to Customize Services** link.

To reorder profiles:

1. Click the **Profile Maintenance** link, and then click the **Reorder Profiles** link.
2. The **Order** field is now a text entry field. Enter the new order for the profiles.
3. Click **Submit**. The profiles are displayed in the order you requested.

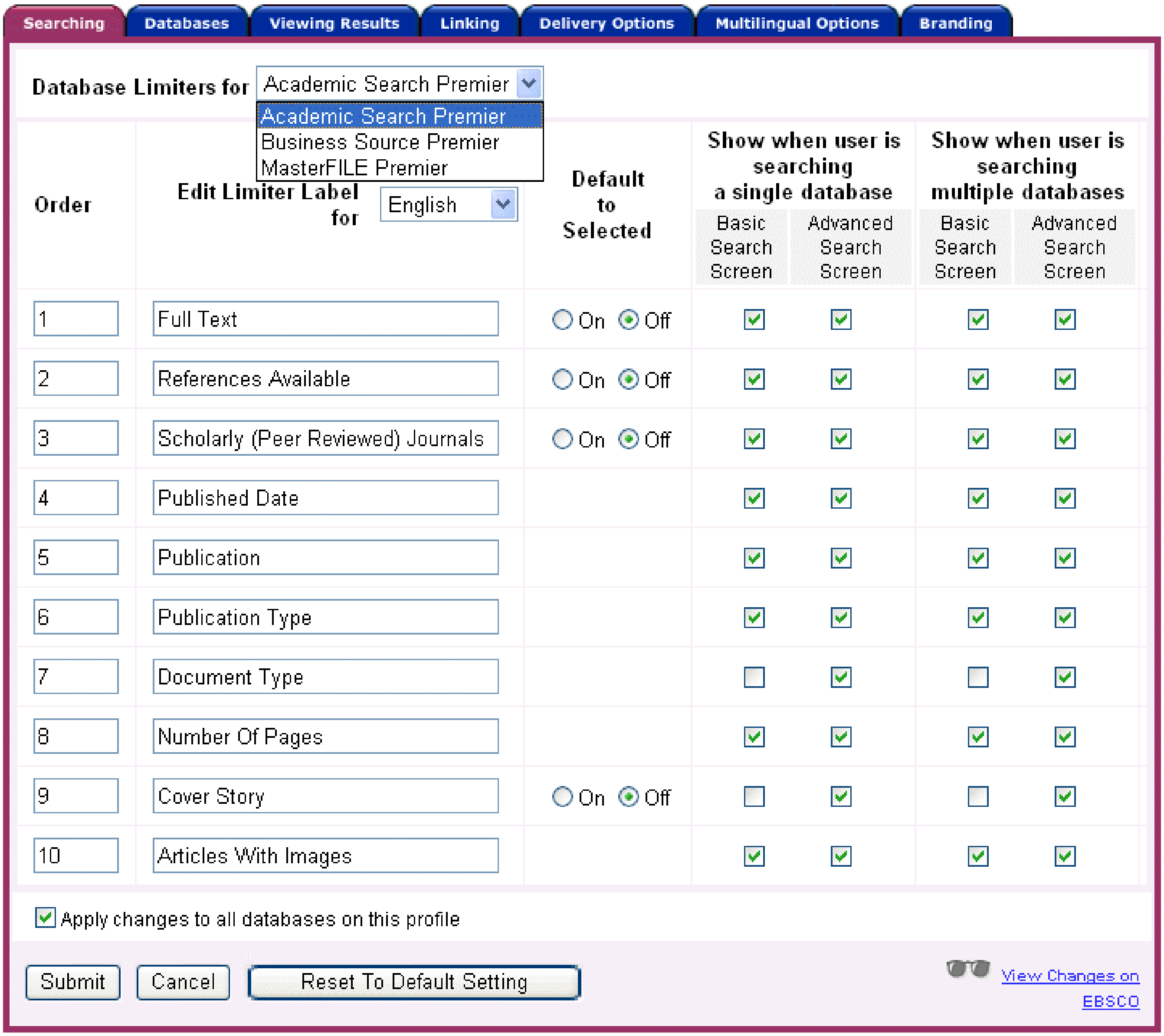
To copy profiles:

1. Click the **Profile Maintenance** link and then click the **Copy Profiles** link.
2. In the **From Source Profile** area, select the **Site**, **Group**, and **Profile ID** for the profile that you want to share.
3. In the **To Target Site** area, select the **Site** and **Group ID** that will receive the shared information.
4. Enter the **Profile ID** that you want for the new profile.
5. Select the parameters that you want to copy, or click the **Select All** button.
6. Click **Submit**. The list of profiles appears with your new profile displayed.

Searching

Select the search screen preferences for the profile. The following options are available:

- **Stop at Choose Database Screen before accessing Search screen** – Indicate whether the user will see the Choose Database Screen first when there is more than one database on the profile.
- **Default Search Screen** – From the drop-down list, select either Basic or Advanced.
- **Spellchecker** – Indicate whether the Spellchecker feature should be available from the search screens.
- **Include Linked Full Text (FT) Journals when using FT** – Indicate whether the full text limiter will include results available through SmartLinking, as well as full text available in the database.
- **Limiters** – Click to modify existing limiter parameters for the databases assigned to the profile.



- **Database Limiters for** – From the drop-down list, choose the database for the limiters you want to change.
- **Order** – This option will display the limiters in the order specified.
- **Edit Limiter Label for** – You can change the default text of the limiter by entering it in the field provided.

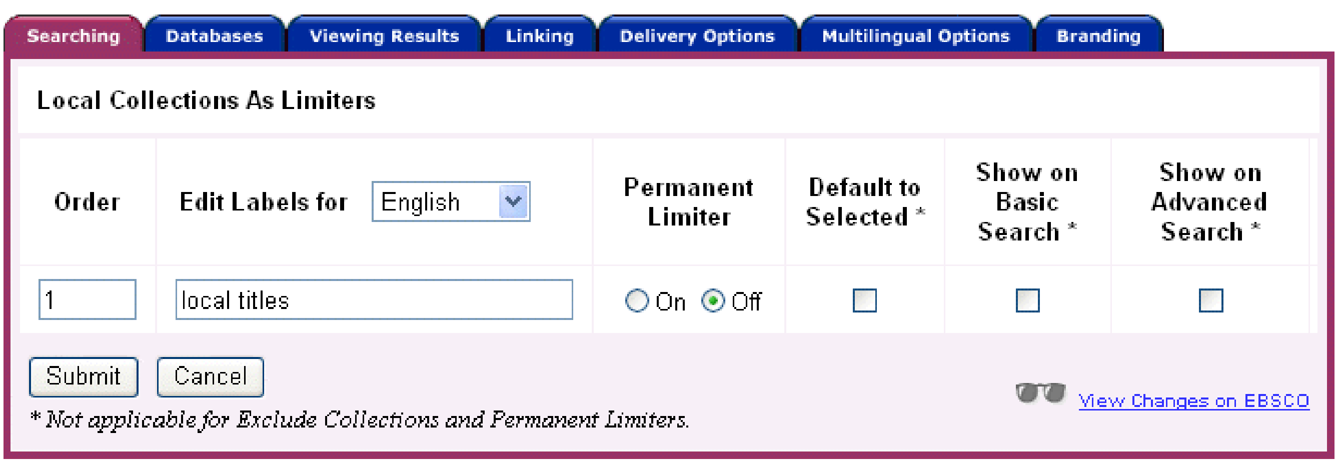
  The Language drop-down list next to the **Edit Limiters for** field allows you to change the default text for the selected language. The text displayed here will be displayed for the limiters on EBSCO*host* when using the multilingual option. When you choose a language from the drop-down list in EBSCO*admin*, all of the limiters will be re-displayed in that language. For example, if Spanish is selected, **Full Text** would be displayed as **Texto completo**. You can change the text for any displayed limiter on EBSCO*host* using the multilingual option in EBSCO*host*.

- ○ **Default to Selected** – Once a limiter is chosen to appear on the search screens, this option will automatically place a check mark next to the limiter.
- ○ **Show when user is searching a single database:**
  - ✓ **Basic Search Screen** – This will place the limiter on the Basic Search Screen.
  - ✓ **Advanced Search Screen** – This will place the limiter on the Advanced Search Screen.
- ○ **Show when user is searching a multiple databases:**
  - ▪ **Basic Search Screen** – This will place the limiter on the Basic Search Screen when searching multiple databases.
  - ▪ **Advanced Search Screen** – This will place the limiter on the Advanced Search Screen when searching multiple databases.

  Note: *If more than one database is selected, limiters common to all databases will be presented first, followed by a section for each set of database-specific limiters.*

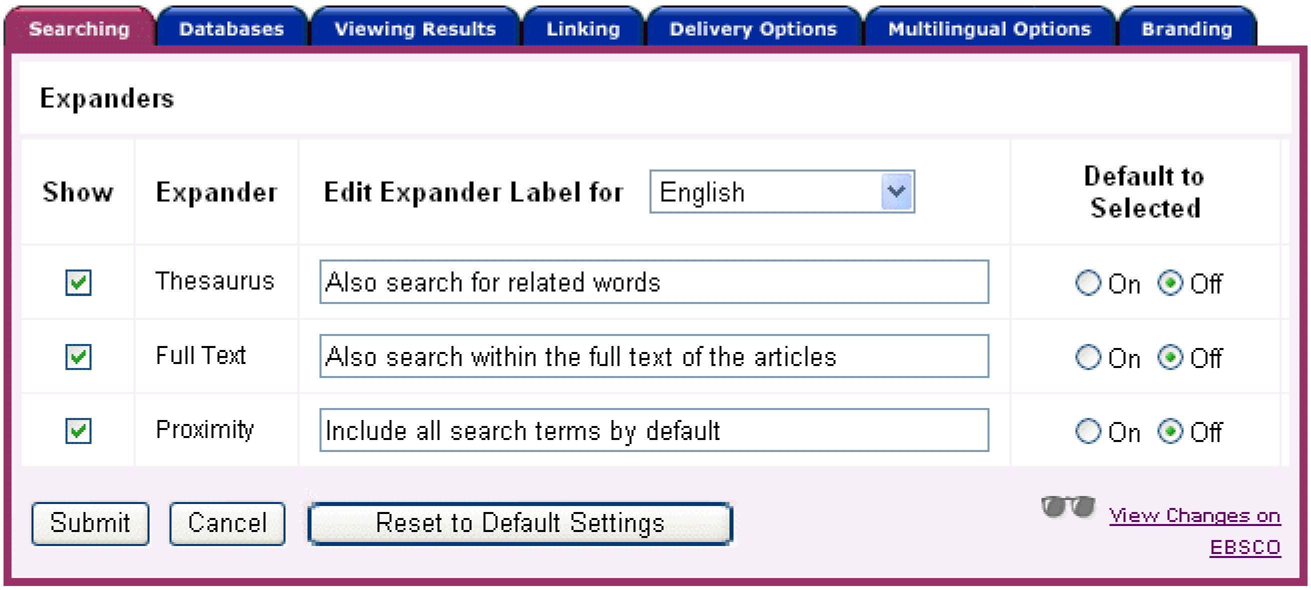
  - ▪ **Apply changes to all databases on this profile** – This option will make the changes across all databases for the specific profile.

- **Local Collections as Limiters** – Click **Modify** to designate one or more local collections as limiters assigned to the profile.
  - ○ **Order** – This option displays the collections, as limiters, in the order specified.
  - ○ **Edit Labels for** – This option allows you to change the text of the limiter. The language drop-down list allows you to change the text of the limiter for a specified language when using the multilingual option in EBSCO*host*.
  - ○ **Permanent Limiter** – This allows you to limit all search results to the titles held in the specified collection.
  - ○ **Default to Selected** – Once a collection is chosen to appear on the search screens, this option automatically places a check mark next to the limiter.
  - ○ **Show on Basic Search** – This will place the collection as a limiter on the Basic Search Screen.
  - ○ **Show on Advanced Search** – This will place the collection as a limiter on the Advanced Search Screen.



Note: *If you choose a collection as a permanent limiter, only results that are a part of that collection will be displayed.*

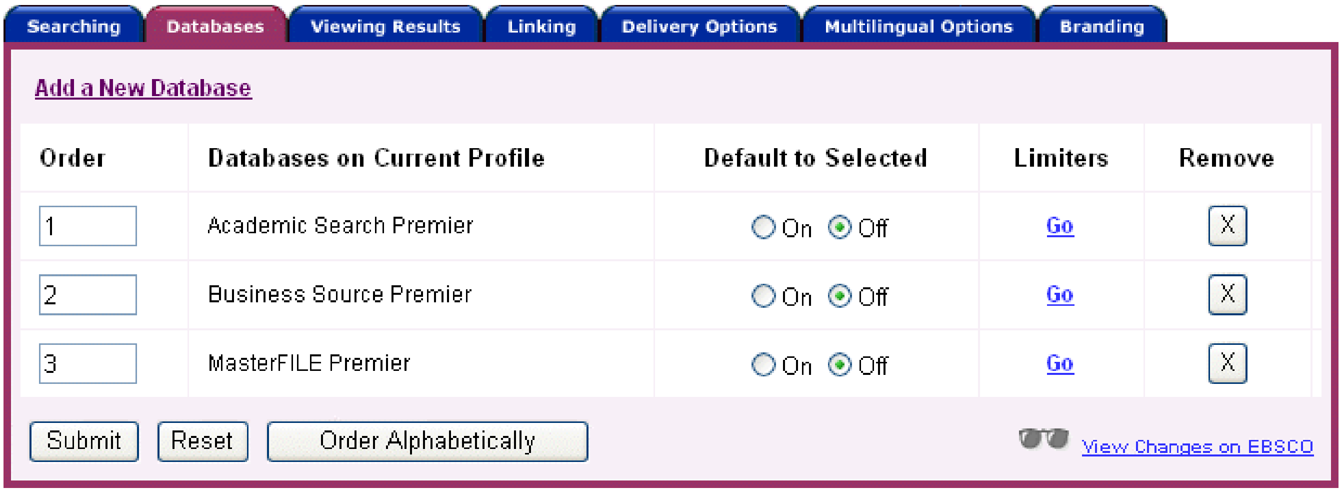
- **Display Local Collection Limiters above Database Limiters on Search Screen** – Select **Yes** to place the local collection limiter(s) above the database limiters on the search screen.
- **Expanders** - Click **Modify** to modify the expanders that can appear on the search screens.



- **Local Collections as Authorities** – Click **Modify** to select one or more of your local collections to appear as separate searchable "authority" databases on the search screens.
- **Session Duration before Timeout** – From the drop-down list, select the duration of inactivity before timeout. The default is 15 minutes.
- **Journal Alerts** – Indicate whether users can access the Journal Alert feature.
- **Index Browse** – Indicate whether the **Indexes** button appears on the toolbar.
- **Page Composer** – Indicate whether the Web Pages link is available from within the folder.
- **Show "Suggest Subject Headings"** – Indicates whether the "Suggest Subject Headings" feature is available on the Advanced Search Screen.
- **Default to Search History or Results upon Searching** – Indicate whether the "active" tab displayed will be Search History or Results.
- **Style of Find Field** – From the drop-down list, select the style of find field that should appear on the Advanced Search Screen: Single Find Field, Single Find Field with Search Builder, or Guided-Style Find Fields.

Databases

You can add databases to the profile and change the order in which they appear on the Choose Database Screen.



To change the order in which the databases appear on the Choose Database Screen, in the **Order** field, enter the order numbers.

- **Default to Selected** – Indicate whether the database should be selected by default on the Choose Database Screen.

Note: *If you want to modify the limiters for a database, click the* ***Go*** *link to the right of the database name. The Database Limiters Screen will display and has the same function described in the Searching Sub-tab.*

Viewing Results

Set how search results will appear for the profile. The following options are available:

- **"Source Types" on the Result List** – Indicate whether results will be broken down by source type when the Result List is presented. Certain databases support this feature.
- **Full Text** – Determine whether the user can/cannot retrieve HTML full text (when it is available for specific records).
- **PDFs** – Indicate whether or not full text articles with PDF images should be available to users.
- **Maximum Keywords Allowed** – Define the maximum number of keywords the server can generate for a single search query. For example, for a search of **car***, the server would generate **caravan**, **cars**, **cart**, **carlisle**, etc. Without a maximum set, retrieval time increases and results can include items not closely related to the search term. We recommend leaving the default value (1000).
- **Number Of Results Per Page** – Define the default number of items that are displayed on a page of search results for a user in this profile.
- **Result List View** – This determines if the items on the Result List will be in the brief citation, a detailed citation, or the title of the article only view.
- **Preferred Order of Formats for Title Link** – Indicate the order in which you want to present available results when the title link is selected. A result may be available in any of these formats: Citation, HTML Full Text or PDF.

- **Include HTML Full Text with Citation** – Indicate whether you will provide users with a citation with abstract and any available HTML full text if the citation view is your preferred format. Otherwise, when the title link is selected, only the citation with abstract is displayed.
- **Display Images within Full Text** – Determine whether or not links to image files (within the full text) are displayed for this profile.
- **Local Message Collection** – The collection that the **Yes** and **No** locals messages, within EBSCO*host,* are based upon for this profile. Any collection that you have set up for your library is available in the Local Message Collection drop-down list.
- **Message for Titles Outside of Local Collection** – This is where you can enter the message text that appears on results in EBSCO*host* for titles outside of the collection. If you want changes made to an existing message to apply to all your profiles, mark the **Change All** check box.

Linking

The following options are available:

- **Setup/Maintain Proxies** – This option allows you to create and maintain proxy servers.

  To update a proxy:

  1. Click on the **Setup/Maintain Proxies** link.
  2. Click on the **ID** link for the desired proxy.
  3. In the **Proxy ID** field, enter the unique identifier for the proxy.
  4. In the **Proxy Name** field, enter the name the library assigns to the proxy server.
  5. In the **Proxy URL Mask** field, enter the base URL used to proxy resources. For example, *http://ezproxy.myinstitute.edu/login?url={targetURL}* or *http://{targetURLDomain}ezproxy.myinstitute.edu/{targetURLRemainder}*
  6. In the **Proxy IP** field, enter the IP address of the proxy server.
  7. In the **Proxy Available** field, select whether you want a flag indicating the proxy server is currently available.
  8. In the **Proxy Note** field, enter a description of the proxy server and information about managing it.
  9. Click **Submit**.

  To create a new proxy:

  1. Click on the **Setup/Maintain** Proxies link.
  2. Click on the **Add New Proxy Definition** link.
  3. In the **Proxy ID** field, enter the unique identifier for the proxy.
  4. In the **Proxy Name** field, enter the name the library assigns to the proxy server.
  5. In the **Proxy URL Mask** field, enter the base URL used to proxy resources. For example, *http://ezproxy.myinstitute.edu/login?url={targetURL}* or *http://{targetURLDomain}ezproxy.myinstitute.edu/{targetURLRemainder}*
  6. In the **Proxy IP** field, enter the IP address of the proxy server.
  7. In the **Proxy Available** field, select whether you want a flag indicating the proxy server is currently available.

8. In the **Proxy Note** field, enter a description of the proxy server and information about managing it.
9. Click **Submit**.

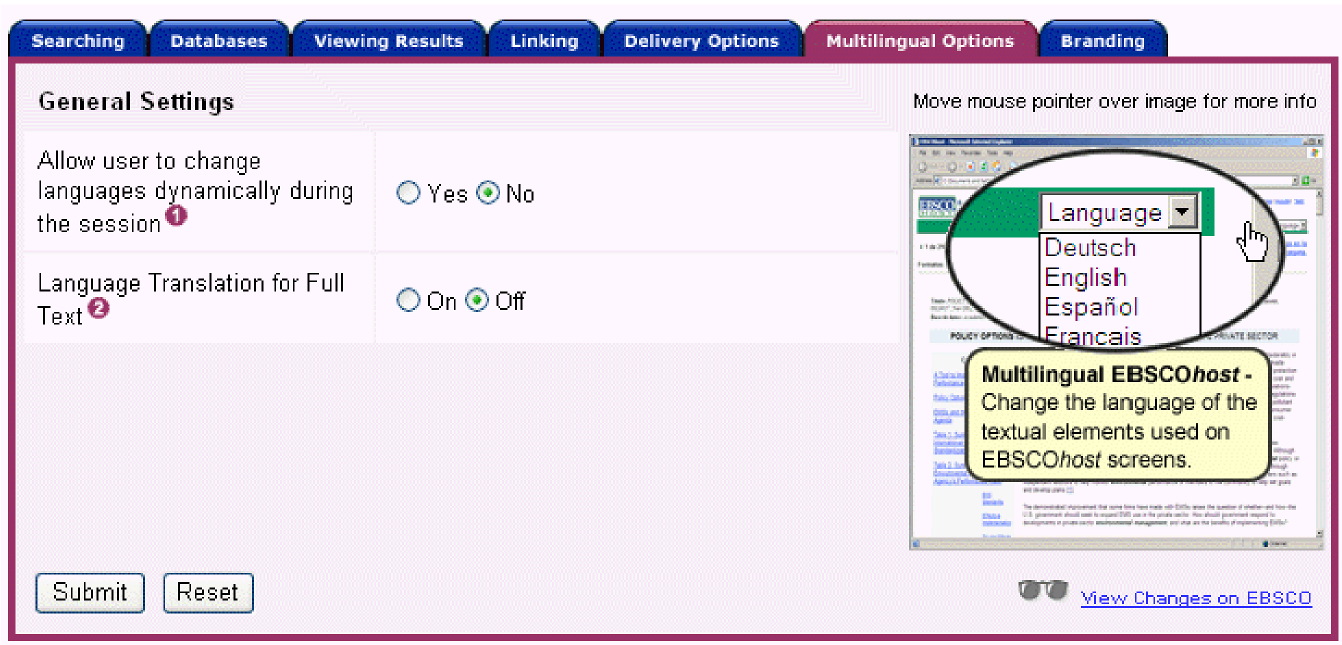
- **CustomLinks** – This option allows you to add CustomLinks to this profile. To create or update a CustomLink, please refer to the CustomLinks section of this guide.
- **Persistent Links**:
  - **Use this Profile for Persistent Links -** Indicate that the profile should be used to log a user in to EBSCO*host* when a persistent link is followed for the same interface type.
  - **Site Information on Persistent Links -** Include site information in persistent link URLs when persistent links are created in EBSCO*host*.
  - **Login Information on Persistent Links -** Include login information in persistent link URLs when persistent links are created in EBSCO*host*.
  - **Primary Proxy for Persistent Links** – Choose the primary proxy for persistent links to EBSCO*host*. This is the first proxy that will be used.
  - **Secondary Proxy for Persistent Links** – Choose a secondary proxy for persistent links to EBSCO*host*. In the event of failure of the Primary Proxy, the Secondary Proxy is used.
- **SmartLinks:**
  - To enable **SmartLinks** for the profile, select **On**.
  - If you subscribe to Electronic Journals Service, in the **Electronic Journals Service (EJS) Linking** field, select **On**.
  - Enter your **EJS Customer ID, User ID** and **password**.
  - To allow profile access to pay-per-view, set the **Allow Pay Per View** field to **On**.
  - If SmartLinks uses CrossRef, select **On**.
  - From the drop-down list, select the collection name that CrossRef uses.

Delivery Options

- **Printing** - To allow the user to print search results, select **On**.
- **Maximum Citations to Print/E-mail/Save** – This setting defines the maximum number of records the user can print or download from a single result list.
- **E-mail** - To allow the user to e-mail search results, select **On**.
- **Include when printing/e-mailing/saving** – Indicate whether the default option is Brief Citation, Brief Citation and Abstract or Detailed Citation and Abstract.
- **Default setting for Remove these items from folder after printing/e-mailing/saving** – Indicate whether this field should default to **On** for the Print, E-mail and Save Managers.
- **Persistent Links Creation** – This setting allows creation of persistent links. A persistent link is a direct link to an article, search or the detail screen of a publication. With this enabled, users are able to save a search as a persistent link in their folder, save a persistent link to an article when saving an article, e-mail a link with an article, or copy a link to the Publication Overview Screen of a specific publication.

Multilingual Options

- **Allow user to change languages dynamically during the session** – This option will place a drop-down list on the sub-toolbar on EBSCO*host*, that will allow users to change the interface text into Spanish, French, German, Portuguese, Italian, Russian, Korean, Japanese, Simplified Chinese or Traditional Chinese.
- **Language Translation for Full Text** – Allow end-users to change the full text from English to French, German or Spanish.



Branding

Setup/Maintain Branding

You can add text and/or graphics to select pages on EBSCO*host.* To do this click on the **Setup/Maintain Branding** link. You can modify an existing branding option or create a new one by clicking on the **Add New Branding** link.

Add New Branding:

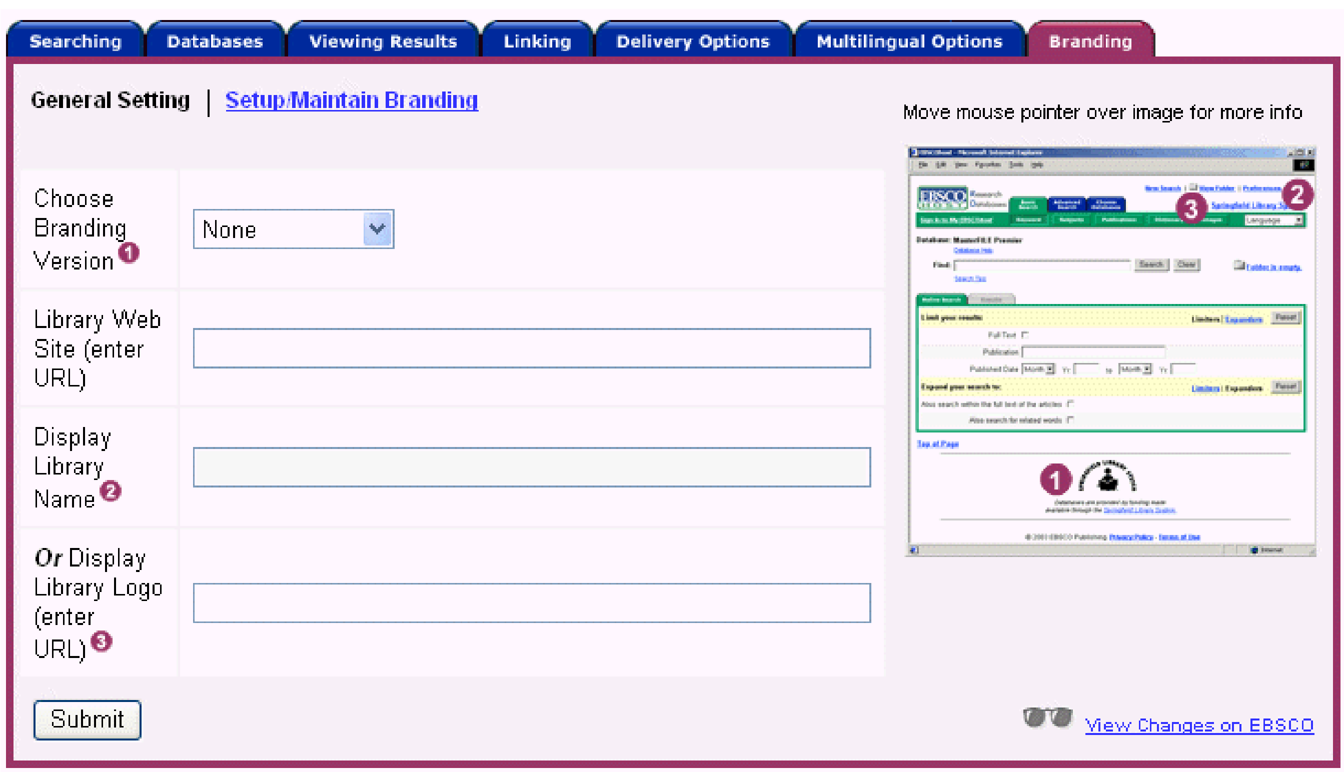
1. Click the **Add New Branding** link.
2. Enter a **Branding Version Name** for the branding you are setting up.
3. In the **Type of Text** field, indicate the format for the custom text (select either HTML or Plain Text.) If you select plain text, it will be converted to HTML.
4. In the **Enter Custom Text** field, type the custom text that will appear at the bottom of the pages you select.
5. Select the screens on which you want your custom branding to appear. You can select any combination of the following screens:
    - Choose Database
    - Basic/Refine Search
    - Basic/Result List

- Advanced/Refine Search
- Advanced/Search History
- Advanced/Result List

6. If you are setting up branding at the consortium level, you can **Add this branding as the default for all Profiles** of the Current Site, All Sites, or No Sites. If you are setting up branding for a site, you can select this branding as the default for all profiles.
7. When you have finished making your selections on this screen, click **Submit**. The Branding Screen appears with a link to your new branding displayed.

General Settings

- **Choose Branding Version** – From the drop-down list, select the version of branding that you want to display.
- **Library Web Site** – You can enter the URL to your institution's home page. When users click this link, they will exit EBSCO*host* and return to your institution's home page.
- **Display Library Name** – If you are not displaying a library logo, you can enter the library name to appear as static text.
- **Display Library Logo** – Enter the URL to your library's home page image or logo, which will appear on the top right of EBSCO*host*, replacing the **Exit** link. The maximum size of an icon or image is 204 pixels wide x 31 pixels high.



Using Authentication – All Administrators

Using EBSCO*admin,* you can add new users, change passwords, add and remove IP addresses and create other forms of authentication for access to EBSCO Publishing's products and services.

Once the authentication option is chosen from the tabbed toolbar, you are offered the choice of seven different authentication methods to set up and maintain.

User ID and Password

User IDs and Passwords for access to EBSCO Publishing's products and services are maintained and confirmed here. You can add new users, change the passwords or move a User ID/Password to a different User Group.

The URL for this authentication method is **http://search.epnet.com/login.asp**.

Note: *This refers to the User ID and Password for EBSCOhost, not EBSCOadmin.*

Adding a new User:

1. From the Authentication Tab choose the User ID/Password Sub-tab.
2. Click the **Add New User** link.
3. If you are a consortium administrator, select the site you want to affect from the Site ID drop-down list.
4. From the **Group ID** drop-down list, select the group.
5. Enter the new User ID and Password.
6. Click **Submit**. The list of User IDs/Passwords appears with your new User ID and Password displayed.

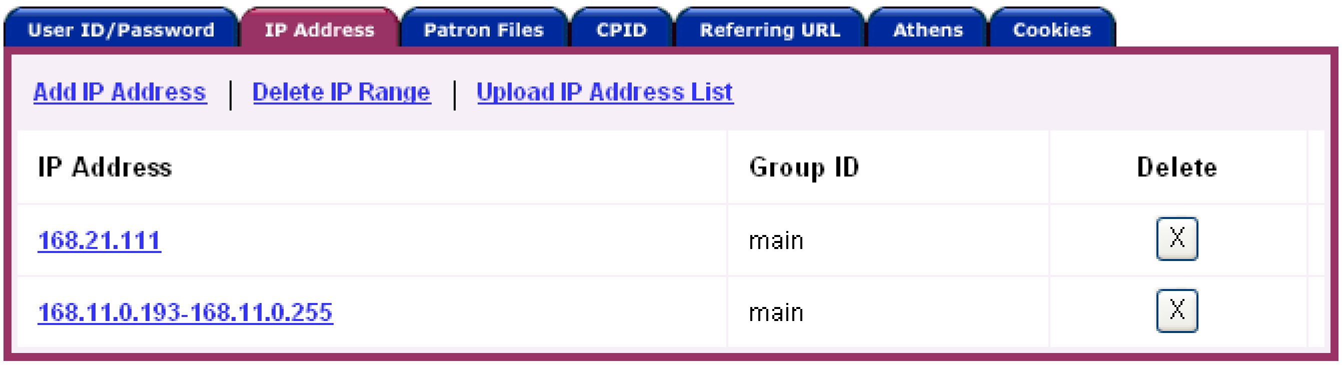
Modifying a User ID/Password:

1. From the Authentication Tab choose the User ID/Password Sub-tab.
2. If you are a consortium administrator you can either choose the site you would like to affect from the **Current Site** drop-down list located in the sub-toolbar, or choose to browse for the User ID by either the **User ID** or **Site Name.**
3. Once the User ID is displayed, click on the corresponding password to modify the information, or click the **Delete** button to remove it.
4. The Edit User Screen appears.
5. You can change the password or the group this User ID has access to.
6. Click **Submit.**

IP address

Entering station IP addresses can eliminate the need for User IDs and Passwords. This view will display the list of currently authenticated IP addresses and allow users to add to, delete from, or modify the list. If a proxy server is in use, its IP address must be entered here.

The URL for this authentication method is **http://search.epnet.com/login.asp**.



Adding a new IP Address:

1. From the Authentication Tab choose the IP Address Sub-tab.
2. Click the **Add IP Address** link.
3. If you are a consortium administrator, select the site you want to work with from the Site ID drop-down list.
4. From the Group ID drop-down list, select the group.
5. Enter the new IP Address or IP Address Range.
6. Click **Submit**. The list of IP Addresses appears with your new IP Address displayed.

Modifying an IP Address:

1. From the Authentication Tab choose the IP Address Sub-tab.
2. If you are a consortium administrator you can either choose the site you would like to affect from the **Current Site** drop-down list located in the sub-toolbar, or choose to browse for the IP Address by either the **IP Address** or **Site Name.**
3. Once the IP Address is displayed, click the IP Address to modify the information, or click the **Delete** button to remove it.
4. The Edit IP Address Screen appears.
5. You can change the IP Address or the group this IP Address points to.
6. Click **Submit.**

Delete an IP Address Range:

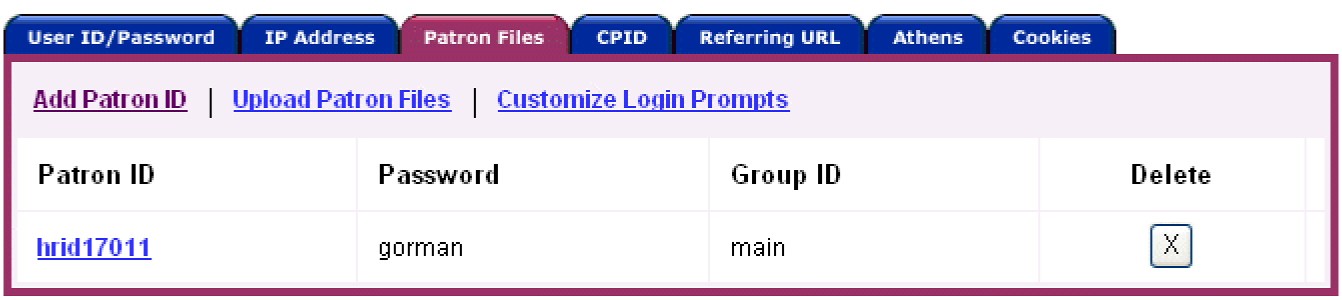
1. From the Authentication Tab choose the IP Address Sub-tab.
2. Click the **Delete IP Range** link.
3. In the box provided, enter the IP Address Range you want to delete.
4. Click **Submit**.

Uploading an IP Address List

1. From the Authentication Tab choose the IP Address Sub-tab.
2. Click the **Upload IP Address List** link.
3. In the **Field Delimiter** field, you can enter any single character, a space, or a tab space.
4. In the **Text Delimiter** field, you can enter a text delimiter (such as ") to enclose the fields containing embedded commas. (The field delimiter and text delimiter are needed to determine how the information is separated in the file.)
5. In the **IP Address** field, enter the column number of the IP Address field in your text file. Do not enter a literal text value in this field.
6. In the **Group ID** field, if your text file contains IP addresses for multiple user groups, enter the number of the column containing the Group ID field. If your text file does not contain this field, enter the User Group ID.
7. In the **Add/Delete Mode** field, indicate whether the record should be added or deleted. Enter an **A** to Add, a **D** to Delete.
8. In the **File Location** field, enter the location where the file should be uploaded. You can use the **Browse** button to navigate to the correct location.
9. If you want an e-mail sent upon completion, enter the e-mail address in the **Notify via E-mail upon Completion** field.
10. Click **Submit**. The list of IP addresses will be uploaded.

Patron Files

By using the Patron Files method of authentication, an administrator can enter and validate their own User IDs and Passwords for individuals or groups of users. For example: If you have 400 faculty members at your institution, you can assign each of them a unique User ID and Password. This would allow you to delete someone's access without affecting anyone else. The base URL for this authentication scheme is **http://search.epnet.com/custlogin.asp?custid=*xxxx*** where ***xxxx*** identifies your library's customer ID within EBSCO*admin*.



Adding a Patron ID:

1. From the Authentication Tab choose the Patron Files Sub-tab.
2. Click the **Add Patron ID** link.
3. If you are a consortium administrator, select the site you want to affect from the Site ID drop-down list.
4. From the Group ID drop-down list, select the group.
5. Enter the new Patron ID and Password.

Note: *A password is not required and you cannot use the same Patron ID twice, even if the password is different.*

6. Click **Submit**. The list of Patron Files appears with your new Patron File displayed.

Modifying a Patron File:

1. From the Authentication Tab choose the Patron Files Sub-tab.
2. If you are a consortium administrator you can either choose the site you would like to affect from the **Current Site** drop-down list located in the sub-toolbar, or choose to browse for the Patron ID by either the **Patron ID** or **Site Name.**
3. Once the Patron ID is displayed, click on it to modify the information or choose the **Delete** to remove it.
4. The Edit Patron Screen appears.
5. You can choose to either change the Patron ID or the group this Patron ID has access to.
6. Click **Submit.**

Uploading a Patron File List:

1. From the Authentication Tab choose the Patron Files Sub-tab.
2. Click the **Upload Patron Files** link.
3. In the **Field Delimiter** field, you can enter any single character, a space, or a tab space.
4. In the **Text Delimiter** field, you can enter a text delimiter (such as ") used to enclose the fields containing embedded commas. (The field delimiter and text delimiter are needed to determine how the information is separated in the file.)
5. In the **Patron ID** field, enter the column number of the Patron ID field in your text file. Do not enter a literal text value for this field.
6. In the **Group ID** field, if your text file contains Patron IDs for multiple user groups, enter the number of the column containing the Group ID field. If your text file does not contain this field, enter the User Group ID.
7. In the **Add/Delete Mode** field, indicate whether the record should be added or deleted. Enter an **A** to Add, a **D** to Delete.
8. In the **File Location** field, enter the location where the file should be uploaded. You can use the **Browse** button to navigate to the correct location.
9. If you want an e-mail sent upon completion, enter the e-mail address in the **Notify via E-mail upon Completion** field.
10. Click **Submit**. The list of Patron IDs will be uploaded.

You may customize the login page with text or graphics in the area above the login box. This page can be tailored to contain information about library hours, directions etc. You can enter this information using plain text, or if you are familiar with HTML, you can include text, pictures and graphics using HTML coding. To utilize this feature, choose the link labeled **Customize** and enter the text in the box provided.

To Customize the Login Prompt:

1. From the Authentication Tab choose the Patron Files Sub-tab.
2. Click the **Customize Login Prompt** link.
3. Choose a language for all of the instructions and links on this login page from the Language drop-down list. Choose from English, Spanish, French or German.
4. In the **Login Text** field, add any notes you would like users to see.
5. In the **Patron ID Prompt** field enter the wording for the prompt. For example: **Enter your HRID number**.

Note: *If you choose to display the links and instructions in another language, you must also enter your text in the above fields in that language.*

6. Choose whether or not you want users to be prompted for a password.

Note: *If you choose not to display the password field and you have created any Patron IDs with a password, those users will not have access to EBSCOhost.*

7. Click **Submit**.

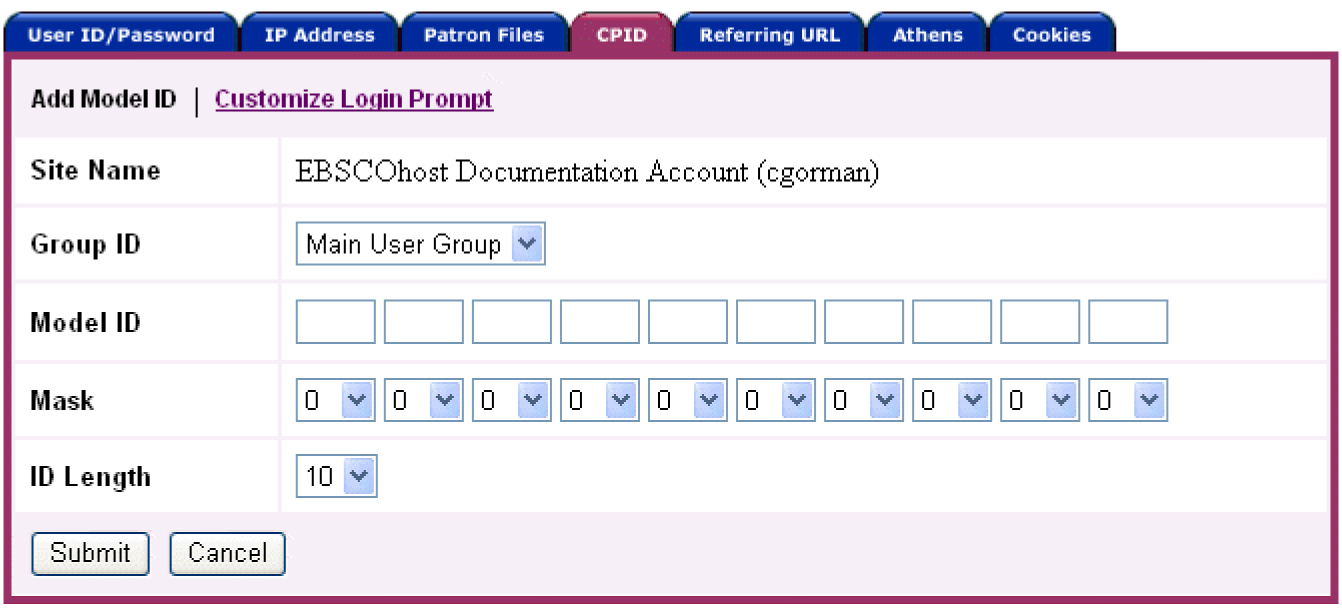
CPID

If you are using an ID that follows a certain pattern, such as a library card, you can use this method of authentication and enter in a Model ID.

The URL for this authentication method is **http://search.epnet.com/cpidlogin.asp?custid=custid** where custid identifies your library's customer ID within EBSCO*admin*. If you would like to utilize this URL on your library web page and would like to authenticate for your IP address, use the following URL: **http://search.epnet.com/cpidlogin.asp?custid=custid&ip=yes**.

Add a Model ID:

1. From the Authentication Tab choose the CPID Sub-tab.



2. Click the **Add Model ID** link.

3. If you are a consortium administrator, select the site you want to affect from the Site ID drop-down list.
4. From the Group ID drop-down list, select the group.
5. Choose the length of your Model ID from the **ID Length** drop-down list.
6. In the **Model ID** fields, enter an example of your ID, using one box for each character.
7. From the drop-down list beneath each Mask, choose the number **1** if that number is required or **0** if that number is dynamic and will change from ID to ID.
8. Click **Submit.**

Modifying A CPID:

1. From the Authentication Tab choose the CPID Sub-tab.
2. If you are a consortium administrator you can either choose the site you want to affect from the **Current Site** drop-down list located in the sub-toolbar, or choose to browse for the CPID by either the **CPID,** or **Site Name.**
3. Once the Model ID is displayed, click the Model ID to modify the information, or choose the **Delete** button to remove it.
4. The Edit CPID Screen appears.
5. You can choose to either change the CPID or which group this CPID has access to.
6. Click **Submit.**

You may customize the login page with text or graphics in the area above the login box. This page can be tailored to contain information about library hours, directions etc. You can enter this information using plain text, or if you are familiar with HTML, you can include text, pictures and graphics using HTML coding. To utilize this feature, click the **Customize Login Prompt** link and enter the text in the box provided.

To Customize the Login Prompt:

1. From the Authentication Tab choose the CPID Sub-tab.
2. Click the **Customize Login Prompts** link.
3. Choose a language for all of the instructions and links on this login page from the Language drop-down list. Choose from English, Spanish, French or German.
4. In the **Login Text** field, add any notes you would like users to see.
5. In the **Patron ID Prompt** field enter the wording for the prompt. For example: **Enter your Library Card number.**

Note: *If you choose to display the links and instructions in another language, you must also enter your text in the above fields in that language.*

6. Click **Submit**.

The base URL for this authentication scheme is **http://search.epnet.com/cpidlogin.asp?custid=*custid*** where ***custid*** identifies your library's customer ID within EBSCO*admin*. If you would like to utilize this URL on your library web page, and would like to authenticate for your IP address, use the following URL: **http://search.epnet.com/cpidlogin.asp?custid=*custid*&ip=yes**. You can optionally suffix the URL with **&profile=*profileid*** where *profileid* identifies one of the profiles for the current user group.

Referring URL

Referring URL authentication can be used to provide access to EBSCO*host* from a secure home page on the library's web server without being re-authenticated. This identifies users by the originating URL (the page from which they came) and eliminates the need for user IDs.

The link to EBSCO*host* must be chosen from the library home page using the specific URL created here. The EBSCO*host* server validates whether the user is coming from an approved URL. The base URL for this authentication method is **http://search.epnet.com/reflogin.asp.**

Adding a Referring URL:

1. From the Authentication Tab choose the Referring URL Sub-tab.
2. Click the **Add Referring URL** link.
3. If you are a consortium administrator, select the site you want to affect from the Site ID drop-down list.
4. From the Group ID drop-down list, select the group.
5. In the **Referring URL** field, enter the URL for the page where users will be coming from.
6. Click **Submit.**

Modifying a Referring URL:

1. From the Authentication Tab choose the Referring URL Sub-tab.
2. If you are a consortium administrator you can either choose the site you would like to affect from the **Current Site** drop-down list located in the sub-toolbar, or choose to browse for the Referring URL by either the **Referring URL** or **Site Name.**
3. Once the Referring URL is displayed, click Referring URL to modify the information or choose the **Delete** button to remove it.
4. The Edit Referring URL Screen appears.
5. You can choose to either change the Referring URL, or the group this URL will point to.
6. Click **Submit.**

Embedded URLs

You can optionally suffix the URLs to direct users to a specific group or profile. After login.asp you can add a **?**, and then include the specific information.

Directing the Patron To:	**URL addition after http://search.epnet.com/login.asp**
A specific profile	?profile=***profileid*** where *profileid* identifies one of the profiles
A specific group	?group=***groupid*** where *groupid* identifies one of the user groups
A specific group and profile	?group=***groupid&***profile=***profileid***

Note: *You can also use custlogin.asp, reflogin.asp and cpidlogin.asp when embedding the group or profile information.*

Athens Authentication

Athens is an authentication service for academic reference systems in Europe. The URL for this authentication scheme is **http://search.epnet.com/athens.asp**. If your users want to use **Athens Authentication** for accessing EBSCO*host* web sites, you can view or change **Athens Authentication** details here.

To add Athens Site Information:

1. Choose the Athens Sub-tab.
2. Click the **Add Athens Site** link.
3. If you are a consortium administrator, from the Site ID drop-down list select the site you want to affect.
4. From the Group ID drop-down list, select the group you want to affect.
5. In the **Athens Organisation Number** field, enter your Athens' ID.
6. Click the **Submit** button.

To modify your Athens Organisation Number:

1. Choose the Athens Sub-tab.
2. If you are a consortium administrator you can either choose the site you would like to affect from the **Current Site** drop-down list located in the sub-toolbar or choose to browse for the **Athens Organisation Number** by either the **Athens Organisation Number** or by the **Site Name.**
3. Once the Athens information is displayed, click the linked Athens information to modify the information or choose the **Delete** button to remove it.
4. The Edit Athens Authentication Screen appears.
5. You can choose to either change the information or the group this Athens information belongs to.
6. Click **Submit.**

Cookies Authentication

Once you have enabled the **Use Cookie** option and the end user has entered EBSCO*host* by any authentication method, a cookie is placed on their computer. When the end user is at the Choose Database Screen or the **Community Page**, they may create a bookmark or type in the URL **http://search.epnet.com/ cookie.asp** for further direct access to EBSCO*host*.

The cookie will stay on their computer for 30 days. After 30 days of not accessing EBSCO*host* the cookie will expire. If within 30 days you access EBSCO*host* via **http://search.epnet.com/cookie.asp,** the cookie will reset for another 30 days.

To set up Cookie Authentication:

1. Click the Cookies Sub-tab.
2. If you are consortium administrator, from the Site ID drop-down list select the site you want to affect.
3. From the Group ID drop-down list, select the group you want to affect.
4. Set **Use Cookies** to **Yes**.
5. Click **Submit**. The group is set up to use cookies.

Local Collections – All Administrators

The local collections feature allows administrators to create a file of publications that are held by the institution. These collections can serve as search limiters as well as an Exclude Collection, and messages can be attached to EBSCO*host* results to indicate to the end user whether a title is held locally or not.

Collections can also be used to filter CustomLinks and LinkSource so the link only appears for selected titles

Add a New Collection

Collection ID	Description	Owned	Owner	Setup/Maintain Titles	Delete
crossref	crossref	Yes	Self	Go	X
eo-eptes	EPTES	No	eonline	Go	X
exclude	exclude	Yes	Self	Go	X
jstor	jstor	No	rug	Go	X
ppv	Locals	Yes	Self	Go	X
s9006637	ACQ UNIT/SERIALS	No	s9006637	Go	X

Adding a New Collection

A collection is a list of journal or magazine titles that are purchased by the library. A collection can be created to identify what journals within EBSCO*host* the library holds locally.

Creating a New Collection:

1. Click the Local Collections Tab. If you are a consortium administrator choose the site you would like to affect from the drop-down list in the toolbar.
2. Click the **Add a New Collection** link.
3. Enter a Collection ID. The collection ID can be from 3-8 characters.
4. Enter a Description for the collection.
5. Indicate whether or not the collection is an Exclude Collection. Any titles within an Exclude Collection will not be searched on EBSCO*host*.
6. Indicate whether or not the Alternate ISSNs should be included.
7. Make your selections and click **Submit**. The Local Collections Screen appears with your new collection name displayed.

Add Title to the New Collection:

1. Under the **Setup/Maintain Titles** column, click the **Go** link to the right of your collection name.
2. Click the **Add New Titles** link.
3. Browse for titles by database or select by title name or ISSN/ISBN. Click **Browse**. A list of titles is displayed.

4. Highlight the journal title. To select more than one journal from the list, hold down the Control (Ctrl) key when choosing the titles.
5. Click **Add to Collection**.
6. Repeat steps 3 – 5 until all the titles you want have been added to your collection.
7. Click the **Back to Title List** link. The list of titles in the collection is displayed.

Sharing a Collection – Consortium Only

Consortium administrators can create a collection and share it with select or all member sites. This can be used for a statewide collection and other CustomLinks.

Sharing a Collection:

1. Click the Local Collections Tab. From the drop-down list in the toolbar, select the site you want to affect.
2. Click the **Share Collection** link.
3. In the **From Source Site** area, select the site from the drop-down list that contains the collection you want to share.
4. Choose the collection you would like to share.
5. In the **To Target Site** area, select the site that will share the collection.
6. Enter the Collection ID and Description that you want for the collection.
7. Click **Submit**. The collection will be added to the target site's list of collections.

Adding Titles to a Collection

You can add titles to your collections at any time.

Add Titles:

1. Under the **Setup/Maintain Titles** column, click the **Go** link to the right of your collection name.
2. Click the **Add New Titles** link.
3. Browse for titles by database, or select by title name or ISSN/ISBN. Click **Browse**. A list of titles is displayed.
4. Highlight the journal title. To select more than one journal from the list, hold down the Control (Ctrl) key when choosing the titles.
5. Click **Add to Collection**.
6. Repeat steps 3 – 5 until all the titles you want have been added to your collection.
7. Click the **Back to Title List** link. The list of titles in the collection is displayed.

Uploading Local Titles

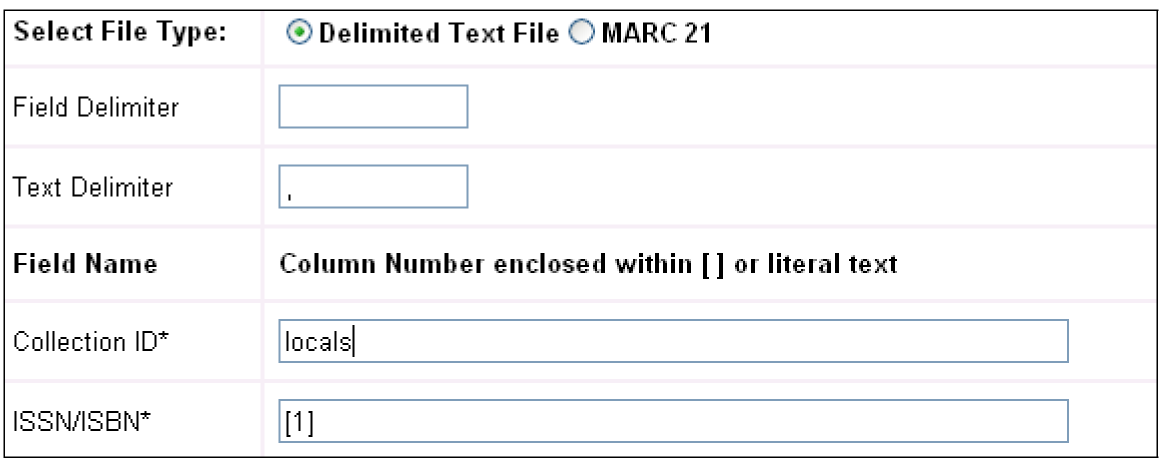
Administrators can choose to upload their collections to EBSCO*admin*. The collection can be in MARC or Delimited Text format.

Delimited Text Format

Before you can upload a list of titles to a collection, you must create the collection.

Uploading the Collection:

1. Under **Setup/Maintain Title**s, click the **Go** link to the right of your collection.
2. Click the **Upload Local Titles** link.
3. In the **Select File Type** field, select **Delimited Text File**.
4. In the **Field Delimiter** field, you can enter any single character, a space, or a tab space.
5. In the **Text Delimiter** field, you can enter a text delimiter (such as ") used to enclose the fields containing embedded commas. (The field delimiter and text delimiter are needed to determine how the information is separated in the file.)
6. In the **Collection ID** field, if your text file contains this field, enter the number of the column containing the Collection ID field. If your text file does not contain this field, you must enter a Collection ID containing up to eight characters.
7. In the **ISSN/ISBN** field, enter the column number of the ISSN/ISBN field in your text file. Do not enter a literal text value for this field. If the ISSN is specified, EBSCO*admin* will match the journal by ISSN, or use the Title Name.



Select File Type:	Delimited Text File / MARC 21
Field Delimiter	
Text Delimiter	,
Field Name	**Column Number enclosed within [ ] or literal text**
Collection ID*	locals
ISSN/ISBN*	[1]

8. In the **Title** field, enter the number of the column containing Title. If your text file does not contain this field, leave it blank.
9. In the **Notes** field, enter the number of the column containing Local Notes. If your text file does not contain this field, leave it blank or enter the Notes Text, which will be added to every title in your collection.
10. In the **Summary Holdings** field, enter the number of the column containing Summary Holdings. If your text file does not contain this field, leave it blank or enter the Summary Holdings text, which will be added to every title in your collection.

11. In the **Call Number** field, enter the number of the column containing Call Number. If your text file does not contain this field, leave it blank or enter the Call Number String, which will be added to every title in your collection.

12. In the **From Date** and **To Date** text fields, enter the numbers of the columns containing the **From** and **To** dates. If your text file does not contain this field in YYYMMDD format, leave it blank or enter **From** and **To** dates, which will be added to every title in your collection.

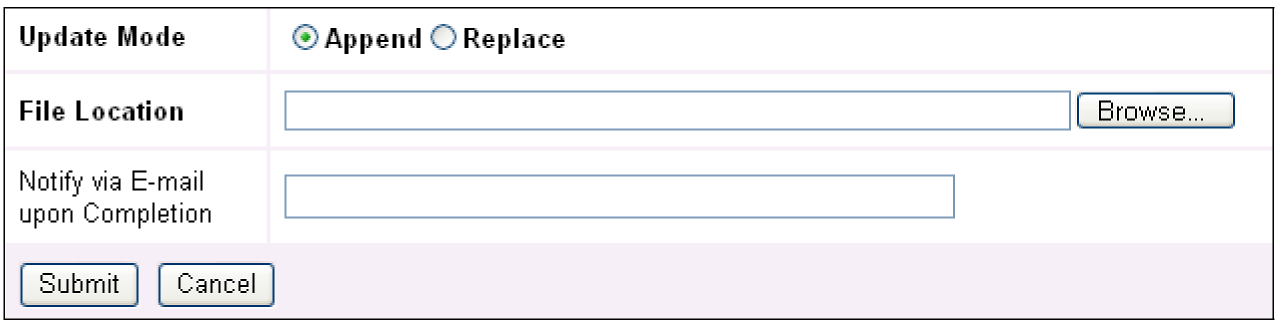
13. Enter the **Yes/No messages** that should to appear on Result List if the item available in the library's local holdings.

14. In the **Update Mode** field, indicate whether the record should be appended or replaced.

15. In the **File Location** field, enter the location where the file should be uploaded. Click the **Browse** button to navigate to the correct location.

16. If you want an e-mail sent upon completion, enter the e-mail address in the **Notify via E-mail upon Completion** field.

17. Click **Submit**. The list of titles will be uploaded.



MARC 21 Format

Before you can upload a list of titles to a collection, you must create the collection.

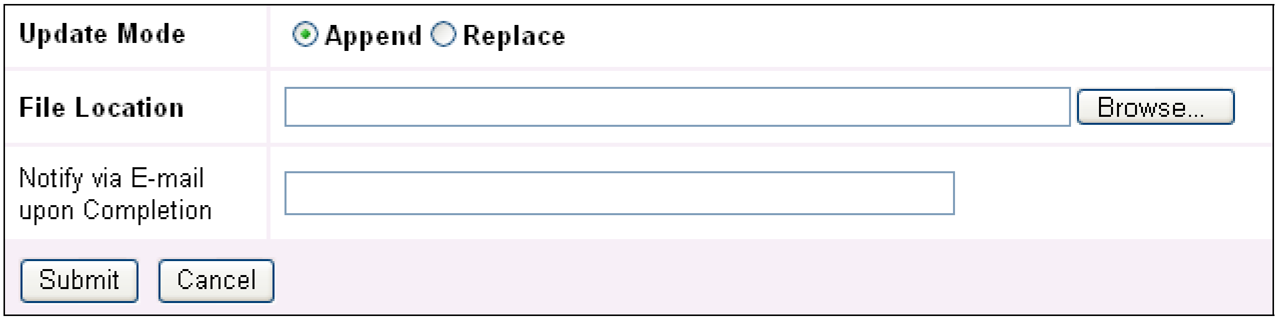
Uploading the Collection:

1. Under **Setup/Maintain Titles**, click the **Go** link to the right of your collection.
2. Click the **Upload Local Titles** link.
3. In the **Select File Type** field, select **MARC 21**.
4. In the **Collection ID** field, if your text file contains this field, enter the number of the column containing the Collection ID. If your text file does not contain this field, you must enter a Collection ID containing up to eight characters.
5. In the **ISSN/ISBN** field, enter the column number of the ISSN/ISBN field in your text file. Do not enter a literal text value for this field.

Select File Type:	○ Delimited Text File ◉ MARC 21
Field Name	**Column Number enclosed within [ ] or literal text**
Collection ID*	bus
ISSN/ISBN*	[022:a]
Title*	

6. In the **Title** field, enter the number of the column containing Title. If your text file does not contain this field, leave it blank.
7. In the **Notes** field, enter the number of the column containing Local Notes. If your text file does not contain this field, leave it blank or enter the Notes Text, which will be added to every title in your collection.
8. In the **Summary Holdings** field, enter the number of the column containing summary holdings. If your text file does not contain this field, leave it blank or enter the summary holdings text, which will be added to every title in your collection.
9. In the **Call Number** field, enter the number of the column containing call number. If your text file does not contain this field, leave it blank or enter the call number text, which will be added to every title in your collection.
10. In the **From Date** and **To Date** fields, enter the numbers of the columns containing the **From** and **To** dates. If your text file does not contain this field in *YYYMMDD* format, leave it blank or enter **From** and **To** dates which will be added to every title in your collection.
11. Enter the **Yes/ No Messages** that should to appear on Result List if the item is available in holdings.

12. In the **Update Mode** field, indicate whether the record should be appended or replaced.
13. In the **File Location** field, enter the location where the file should be uploaded. Click the **Browse** button to navigate to the correct location.
14. If you want an e-mail sent upon completion, enter the **e-mail address** in the **Notify via E-mail upon Completion** field.
15. Click **Submit**. The list of titles will be uploaded.



E-Mailing a Title List

Library administrators can e-mail themselves a complete title list for any selected collections. They can include all holdings information as well.

E-mailing a Collection:

1. Click the Local Collections Tab.
2. Under **Setup/Maintain Titles**, click the **Go** link to the right of your collection name.
3. Click the **E-mail Title List** link.
4. In the **Output Format** field, select either Tab Delimited or Comma Delimited.
5. Enter the **e-mail address** where the report should be sent.
6. In the **Report Name** field, enter a subject line for the e-mail that delivers your report.
7. Choose which fields and in what column you would like to receive in your e-mail; **ISSN, Title, Yes Message** etc.
8. Click **Submit**. The list of titles will be e-mailed.

Updating the Local Limiter

If the collection is an Exclude Collection or you are using a collection as a limiter and you have made changes to the collection, you will need to update the Local Limiter file.

1. Click the Local Collections Tab. Under **Setup/Maintain Titles**, click the **Go** link to the right of your collection name.
2. Click the **Update Local Limiter** link. Enter the **e-mail address** to be notified upon completion.
3. Click **Submit**. The Local Limiter file will be updated.

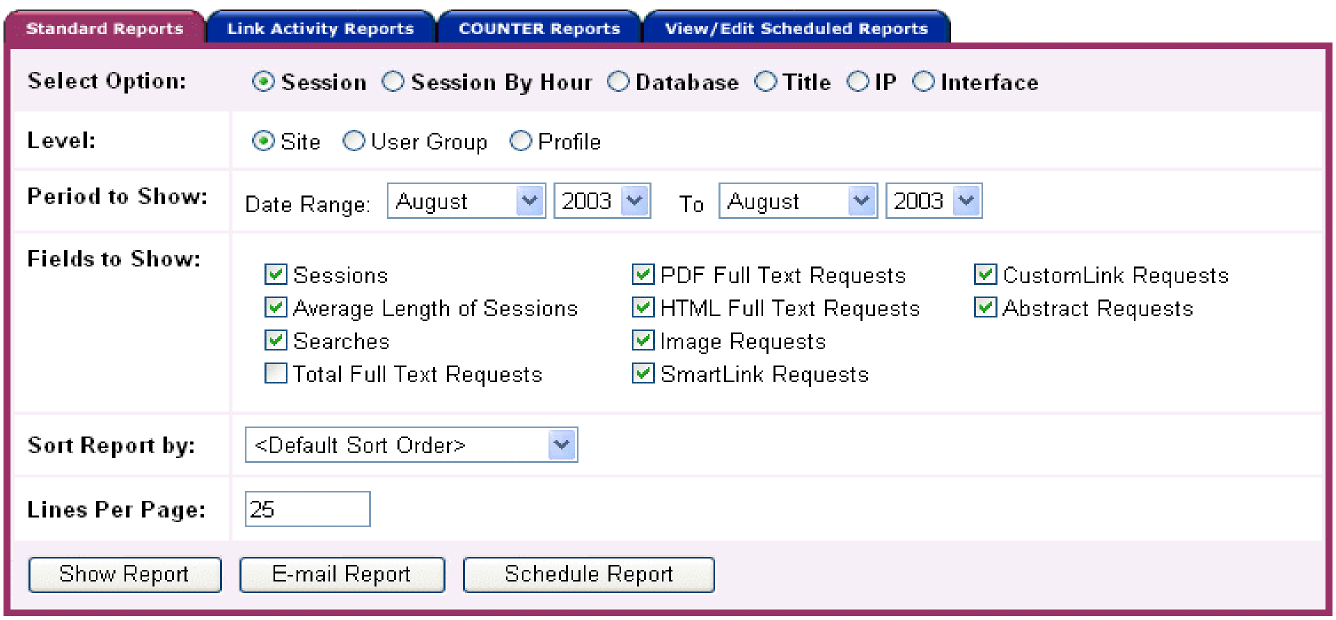
Reports & Statistics – All Administrators

EBSCO*admin* automatically collects usage statistics on overall EBSCO*host* usage within your library system or consortium. Usage statistics can be used to measure how often titles and databases are searched. Title, database, session and link activity statistics can be collected for specific time periods (monthly or annually), limited to a specific data field, and sorted. These reports can be either viewed or e-mailed in HTML, Tab Delimited or Comma Delimited format.

There are three different groups of reports that can be requested in EBSCO*admin*. Each group has multiple reports that can be requested.

Standard Reports

There are five reports available from the Standard Reports Tab. Each report can be viewed onscreen, e-mailed or scheduled to be automatically e-mailed on a monthly or yearly basis.

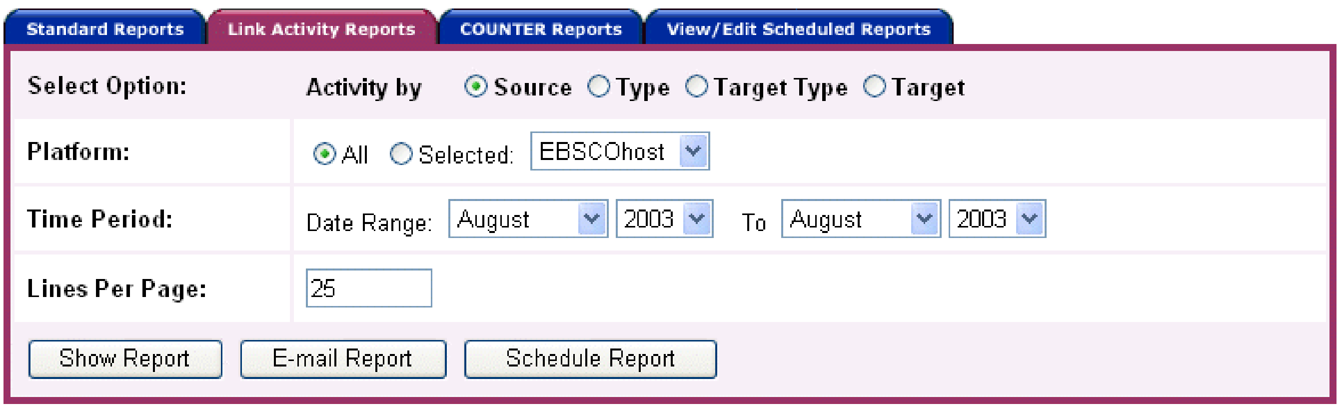


- **Session Usage –** This report allows the administrator to track the total usage statistics either by Site (where site represents the current selection), User Group (where user group indicates the entire user group), or Profile (where profile ID represents a chosen profile created in the profile section as described above). It can be created monthly, or for a period of months. It can also be modified for specific content by choosing individual tracking parameters with the **Fields to Show** option, and each can be sorted by that field.
- **Session By Hour –** This report allows the administrator to track total usage statistics by hour. You have the choice to either view an average usage by hour, a maximum usage by hour or a minimum usage by hour. This report can be created daily, monthly, or for a period of months. It can also be modified for specific content by choosing individual tracking parameters with the **Fields to Show** option, and each can be sorted by that field.
- **Database Usage –** This report represents the total volume of activity for a given database or the entire list of databases subscribed to and can be displayed monthly, or for a specific period of months, as with the above reports. This report can also be generated for a specific User Group, Database, or Profile ID. It can also be modified for specific content by choosing individual tracking parameters with the **Fields to Show** option, and each can be sorted by that field.

- **Title Usage –** This report displays all publications that were viewed by the patrons of a given institution. It can be created monthly, or for a period of months. This report can also be modified for specific content by choosing individual tracking parameters with the **Fields to Show** option, and each can be sorted by that field. You can also limit the report to your local titles only once; they have been saved in EBSCO*admin*.
- **IP Address Usage –** This report displays the individual IP addresses and usage volume associated with the selected site. It can be generated either monthly or for a period of months.
- **Interface Usage –** This report displays the number of logins, searches, hits, abstracts accessed, e-mails, and the number of full text articles accessed in a month or year, for each interface. It can also be modified for specific content by choosing individual tracking parameters with the **Fields to Show** option, and each can be sorted by that field.

Link Activity Reports

Link Activity reports provide a breakdown of activity for linking to EBSCO*host* from another source and from EBSCO*host* to another source. For example, the administrator can track the number of times a patron chooses a link from the library catalog to EBSCO*host*.



- **Link Activity Report by Source** - This report provides statistics for each source on the Link In. The Source refers to the originating URL or application name for the Link In.
- **Link Activity Report by Type** - This report provides statistics for each type of Link In. The type refers to the genre in the case of CustomLinks or journal, article; source in the case of persistent links for the Link In.
- **Link Activity Report by Target Type** - This report provides Link Out statistics for each target type. The target type refers to the type of service (Document Delivery, ILL, OPAC, and SmartLink) that is being linked to.
- **Link Activity Report by Target** - This report provides Link Out statistics for each target. The target refers to the actual service name (Wiley, OCLC, and CISTI) that is being linked to.

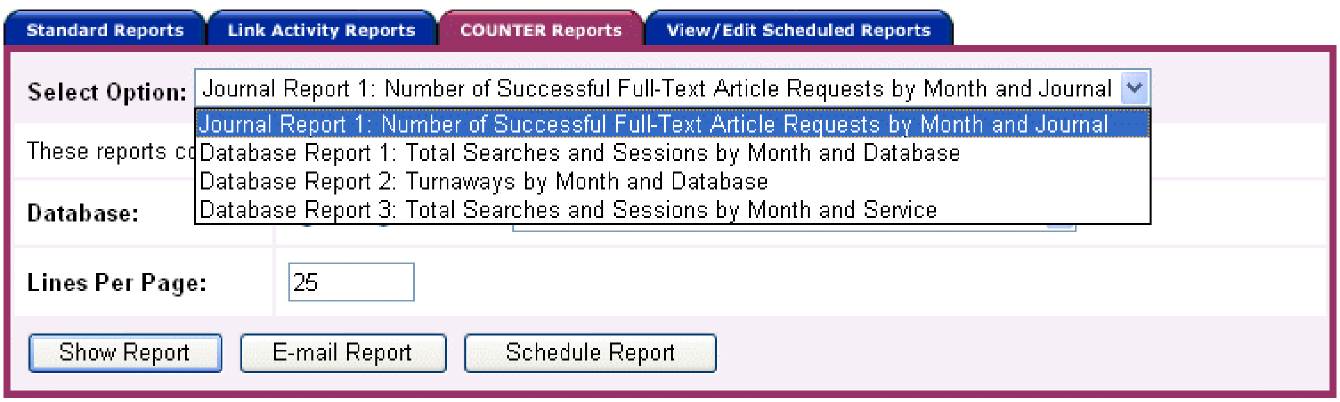
COUNTER Reports

The COUNTER Code of Practice was developed to provide a single, international, extendible Code of Practice that allows the usage of online information products and services to be measured in a credible, consistent and compatible way using vendor-generated data. The COUNTER Code of Practice specifies: the data elements to be measured, definitions of these data elements; usage report content, format, frequency and methods of delivery; protocols for combining usage reports from direct use and from use via intermediaries. The Code of Practice also provides guidelines for data processing by vendors and auditing protocols.

For more information on COUNTER, please visit http://www.projectcounter.org.

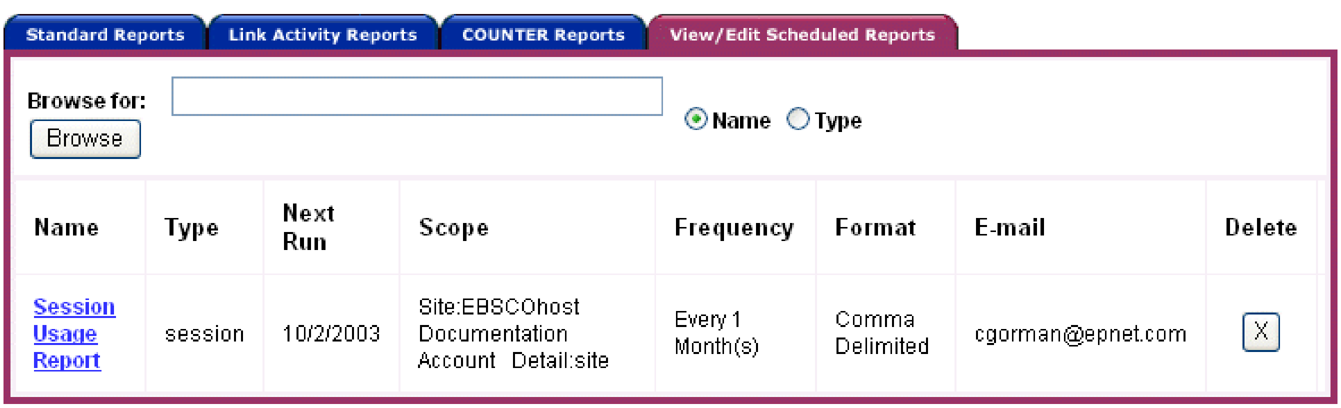
There are four reports available:

- Journal Report 1: Number of Successful Full Text Article Requests by Month and Journal
- Database Report 1: Total Searches and Sessions by Month and Database
- Database Report 2: Turnaways by Month and Database **– Future Enhancement**
- Database Report 3: Total Searches and Sessions by Month and Service



View/Edit Scheduled Reports

The View/Edit Scheduled Reports Tab lists any reports you have scheduled to be automatically gathered and e-mailed on a monthly basis. From this tab you can change the format and frequency of the reports as well as change the e-mail addressees.



Database Title List – All Administrators

You can download title lists in MARC, HTML or Tab Delimited formats. Download instructions, modification notes and sample records are available for each format. You can choose to download a file with all index publications in the product, or a file with only those titles that have full text.

Note: *Only EBSCO Publishing proprietary databases will have a title list available. The Database Title List Tab will only display those databases that you subscribe to.*

MARC 21

From the MARC 21 Sub-tab, you may choose to download a title list, look at the instructions for downloading, view the modification notes for the records or view a sample record. To perform any of these options, choose the associated link. The 856 field contains a link to Publication Details Screen in EBSCO*host*.

To download a title list:

1. Click on the MARC 21 Sub-tab.
2. Find your product in the list.
3. Click on the file name in the corresponding column.
4. Your browser download window will open. Follow the instructions on the download window to save the file to your system.

Once you have downloaded the desired file(s), you will need to import them into your automated library system.

HTML

From the HTML Sub-tab, you may choose to download a title list, or look at the instructions for downloading. To perform either one of these options, choose the associated link. The linked publication name contains a link to Publication Details Screen in EBSCO*host*.

To download a title list:

1. Click on the HTML Sub-tab.
2. Find your product in the list.
3. Click on the file name in the corresponding column.
4. Your browser download window will open. Follow the instructions on the download window to save the file to your system.

Tab Delimited

From the Tab Delimited Sub-tab, you may choose to download a title list, or look at the instructions for downloading. To perform either one of these options, choose the associated link. The URL field contains a link to Publication Details Screen in EBSCO*host*.

To download a title list:

1. Click on the Tab Delimited Sub-tab.
2. Find your product in the list.
3. Click on the file name in the corresponding column.
4. Your browser download window will open. Follow the instructions on the download window to save the file to your system.