Harvard LibraryLab

Link-o-matic UserGuide

Version 1.0

Updated: Dec. 6, 2016 to correct library.harvard.edu links
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1. Introducing Link-o-matic

What is Link-o-matic?

Link-o-matic is a web-based application used by Harvard archivists and library staff. This application automates the insertion of links in EAD\(^1\) finding aids available in Harvard's Online Archival Search Information System (OASIS). The inserted links retrieve digital records stored in Harvard's Digital Repository Service (DRS).

Intended audience for this guide

The intended audience for this guide includes Harvard archivists and library staff members who use Link-o-matic to link digital collections.

This document assumes that the audience is familiar with computers and web browsers such as Internet Explorer.

Related documentation

The following links provide related documentation:

<table>
<thead>
<tr>
<th>Describes</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>General information about DRS</td>
<td><a href="http://library.harvard.edu/lts/systems/drs/">http://library.harvard.edu/lts/systems/drs/</a></td>
</tr>
<tr>
<td>DRS deposit documentation</td>
<td><a href="http://library.harvard.edu/lts/systems/drs/deposit">http://library.harvard.edu/lts/systems/drs/deposit</a></td>
</tr>
<tr>
<td>Documentation for OASIS. Includes documentation on two methods for uploading documents to OASIS: the Interactive Loader and FTP. Also provides a link to the Interactive Loader.</td>
<td><a href="http://library.harvard.edu/lts/systems/oasis">http://library.harvard.edu/lts/systems/oasis</a></td>
</tr>
</tbody>
</table>

Support

To get support for Link-o-matic, contact the Library Technologies Support Center:

http://library.harvard.edu/lts/systems/linkomatic

\(^1\)EAD (Encoded Archival Description) is a national XML DTD standard for encoding archival materials.
2. Accessing Link-o-matic

Introduction
This chapter describes how to access Link-o-matic and change account settings.

Creating a Link-o-matic Account
To create a Link-o-matic account:

1. Open a web browser and go to the URL: http://linkomatic.lib.harvard.edu
   Link-o-matic displays the Sign In screen (Figure 2-1).

   Figure 2-1. Link-o-matic Sign In Screen.

   ![Sign In Screen]

   Click the Sign up link to start creating an account.

2. On the Sign In screen, click **Sign up**, which appears below the **Sign in** button.
   Link-o-matic displays the Sign Up screen (Figure 2-2).

   Figure 2-2. Link-o-matic Sign Up Screen.

   ![Sign Up Screen]
3. On the Sign Up screen, enter your **Email**, **Password**, and **Password confirmation** and click **Sign Up**.

Link-o-matic displays a welcome message (Figure 2-3).

**Figure 2-3. Link-o-matic Welcome Message.**

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**Signing in**

To sign in to Link-o-matic:

1. Open a web browser and go to the URL: [http://linkomatic.dev.berkmancenter.org/](http://linkomatic.dev.berkmancenter.org/).

   Link-o-matic displays the Sign In Screen (Figure 2-1 on page 7).

2. On the Sign In screen, enter your **Email** and **Password** and click **Sign in**.

   Link-o-matic displays a welcome message that is similar to Figure 2-3.
Resetting a forgotten password

To reset a forgotten password:

1. On the Sign In Screen (Figure 2-1 on page 7), click the Forgot Your Password link.

   Link-o-matic displays the Forgot Your Password screen (Figure 2-4).

   **Figure 2-4. Forgot Your Password Screen.**

2. On the Forget Your Password screen, enter your Email address and click Send me reset password instructions.

   Link-o-matic displays a message indicating that you will receive an email message with instructions for resetting your password (Figure 2-5).

   **Figure 2-5. Password Reset Message.**

3. Go to your email and open the message that is similar to the example show in Figure 2-6.

   **Figure 2-6. Example of an Email Message for Resetting a Forgotten Password.**

4. In the email message, click Change my password.

   Link-o-matic displays the Change Your Password screen (Figure 2-7).
5. On the Change Your Password screen, fill in the **New Password** and **Confirm new password** fields, and click **Change My Password**.

Link-o-matic displays a confirmation message.

**Figure 2-8. Confirmation of a Password Reset.**

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**Signing out**

To sign out, select **Sign out** from the My Account drop-down list that appears at the top right of the screen (Figure 2-9).

**Figure 2-9. Sign out Selection on the My Account Drop-Down List.**
3. Setting Up Link-o-matic

Introduction
This chapter describes how to set up Link-o-matic.

Editing user settings
Link-o-matic enables you to change the following user settings:

- Email
- Password
- EAD settings

You can also cancel your Link-o-matic account.

You can change individual settings or multiple settings at the same time. For example, you can change only your password or both your password and EAD settings.

To begin editing user settings

1. Select **Edit** from the My Account drop-down list that appears at the top right of the screen (Figure 3-1).

   ![Figure 3-1. Edit Selection on the My Account Drop-Down List.](image)

   Link-o-matic then displays the Edit User screen (Figure 3-2).
2. Make any desired changes on the Edit User screen, fill in your **Current password**, and click **Update**.

   **Note**: When you specify **User EAD Settings**, be aware of the hierarchy for EAD settings. See Appendix A, [EAD Settings](#) on page 21.

After you update the settings, Link-o-matic displays a confirmation message (Figure 3-3).

**Figure 3-3. Confirmation Message After Editing User Settings.**
Viewing projects

In Link-o-matic, a project is a mechanism that allows you to apply saved settings when working with finding aids.

After you sign in to Link-o-matic, you see a list of projects that appear on the Link-o-matic main screen. The list of projects appears below the welcome message (Figure 3-4).

Figure 3-4. List of Projects on the Link-o-matic Main Screen.

Information displayed for each project

Link-o-matic displays the information listed in the following table for each project.

<table>
<thead>
<tr>
<th>Project Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create New Project</td>
<td>Link that displays the New Project screen. See the topic Creating a new project on page 15.</td>
</tr>
<tr>
<td>Project name</td>
<td>A name assigned when you created the project. Link-o-matic also provides a project named Default Project.</td>
</tr>
<tr>
<td>Delete</td>
<td>Link that enables you to remove the project.</td>
</tr>
</tbody>
</table>
Project Information | Description
---|---
Finding Aids | A list of finding aids that the tool previously linked. Each finding aid listed is a link. Click any of these link to display a screen where you can update the links in the finding aid.
Load New Finding Aid | A button that displays the Load New Finding Aid screen.
Settings | Displays the following settings that apply to all finding aids that are linked under this project:
  - Link Text
  - EAD Template
  - Owner Code
  - Default Thumbnail
  The project settings override any user settings. For the hierarchy of settings, see Appendix A, [EAD Settings](#) on page 21.
Edit | A button that displays the Edit Project Settings screen.

**Default project**

The first project shown on the Link-o-matic main screen is the "Default" project. Link-o-matic supplies this project for you. Link-o-matic also supplies an Example Finding Aid.

If the settings for the Default project are acceptable, you can link as many finding aids as desired with these settings.
Creating a new project

To create a new project:

1. Click the **Create New Project** link that appears next to the heading "Projects" on the Link-o-matic main screen (Figure 3-4 on page 13).

   Link-o-matic displays the New Project screen (Figure 3-5).

   **Figure 3-5. New Project Screen.**

2. On the New Project screen, enter a **Name**, specify the **Project EAD Settings**, and click **Create Project**.

   Link-o-matic refreshes the main screen with the newly created project.

After you create a project, you can use that project to link any desired finding aid as described in the next chapter.
4. Adding Links to Finding Aids

Introduction

This chapter describes how to use Link-o-matic to add links to finding aids. This chapter assumes that you have set up Link-o-matic as described in the previous chapters.

Downloading a finding aid from OASIS

Before you add links to a finding aid, download the EAD XML file for the finding aid from OASIS by using the interactive loader.

For documentation on using the interactive loader and a link to the loader, see http://library.harvard.edu/lts/systems/oasis

Specifying a finding aid file for adding links

To specify a finding aid file for adding links:

1. On the Link-o-matic Main screen (Figure 3-4 on page 13), click the Edit button to change any settings for the project that you intend to use to link the finding aid. If the existing settings are suitable, you can skip this step.

2. For the desired project, click Load New Finding Aid on the Link-o-matic Main screen.

   Link-o-matic displays the Load New Finding Aid screen (Figure 4-1).

   Figure 4-1. Load New Finding Aid Screen.
3. On the Load New Finding Aid screen, click the **Browse** button to navigate to a finding aid file on your computer. Also specify the **Owner Code** and **Name** for the finding aid.

   - If you choose the Upload functionality instead of the Paste URL functionality, there is no URL from which Link-o-matic can pull the **Owner Code**.
   - If you leave the **Owner Code** blank, Link-o-matic pulls it from the URL.
   - If you leave **Name** blank, Link-o-matic pulls it from the file.

4. When you finish filling out the Load New Finding Aid screen, click **Load Finding Aid**. Link-o-matic loads the Finding Aid as shown in the following example.

   **Figure 4-2. Example of a Finding Aid Screen.**

   ![Finding Aid Screen Example]

Continue with the next section to add links to the finding aid.
Adding links to a finding aid

To add links to a finding aid:

1. On the screen for a specific finding aid, change any Finding Aid EAD settings, if needed.
2. Change any desired settings for any individual EAD component by clicking the corresponding component ID link.
3. Click **Fetch URNs** to add the links to the EAD.
   
   Link-o-matic displays the message "EAD successfully created" at the top of the screen.
4. Click **Download EAD**.
   
   Link-o-matic displays a pop-up message that enables you to save or open the finding aid file. The appearance of this window depends on your computer’s settings.
5. Save the finding aid file to a convenient location.

Checking the finding aid and uploading it

After adding links to a finding aid file and saving it, you can check over the file by opening it with the OASIS previewer or an XML editor such as Oxygen or XMetal. You can also test the links, if desired.

After you check the finding aid file and test any links, you can upload the finding aid file to OASIS as described in [http://library.harvard.edu/lts/systems/oasis](http://library.harvard.edu/lts/systems/oasis).
A. EAD Settings

EAD settings enable you to specify text for links, such as "See digital image," and an optional thumbnail image. Link-o-matic provides four levels of EAD settings:

1. User
2. Project
3. Finding Aid
4. Component

The order of this list is from least specific to most specific. More specific settings override less specific settings.

If more specific settings are blank, they get their values from the preceding level.

For example, if you change the user settings, the finding aid settings change. However, if you change the finding aid settings, the user settings do not change. The user settings are no longer relevant when you supply more specific finding-aid settings.

Setting levels are useful when you want a project to have the same Link Text, but a different thumbnail for each component. In this situation, you set the Link Text at the project level and specify a Show Thumbnail value for each component.

The levels of EAD settings mirror the relationship between the objects themselves: a user has many projects, a project has many finding aids, and a finding aid has many components.

The default user EAD settings are:

- **Link Text**: Click here for digital copy.
- **Show Thumbnails**: False.
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