



Harvard Library Lab

Link-o-matic User Guide

Version 1.0



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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 EAD¹ 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:

Describes	Link
General information about DRS	http://hul.harvard.edu/ois/systems/drs/
DRS deposit documentation	http://hul.harvard.edu/ois/systems/drs/depositing.html
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.	http://hul.harvard.edu/ois/systems/mat/documentation.html

Support

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

<http://hul.harvard.edu/ois/support/>.

¹EAD (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.dev.berkmancenter.org/>

Link-o-matic displays the Sign In screen (Figure 2-1).

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

2. On the Sign In screen, click **Sign up**, which appears below the **Sign in** button.

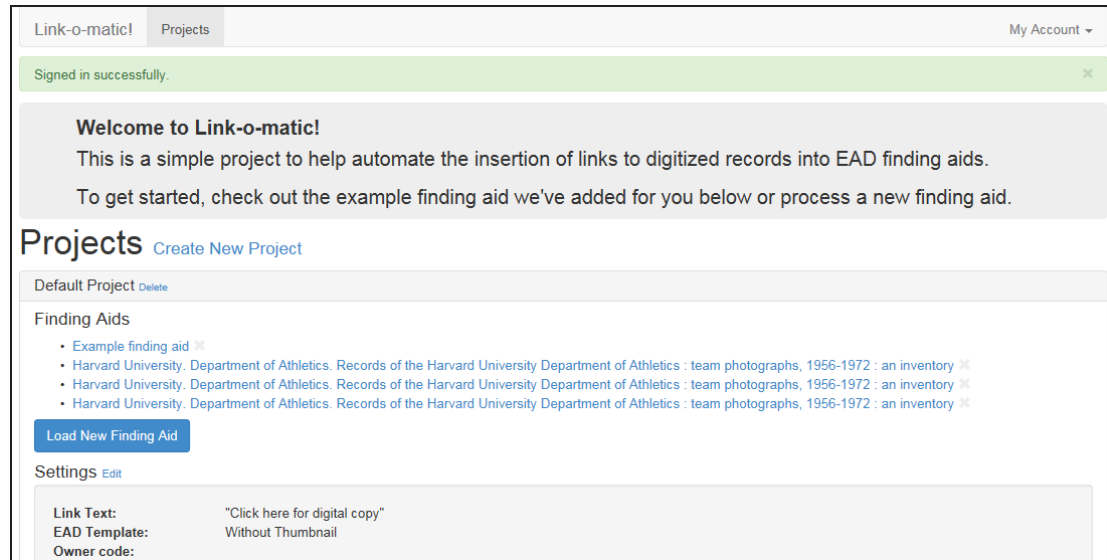
Link-o-matic displays the Sign Up screen (Figure 2-2).

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

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.



Signing in

To sign in to Link-o-matic:

1. Open a web browser and go to the URL: <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).

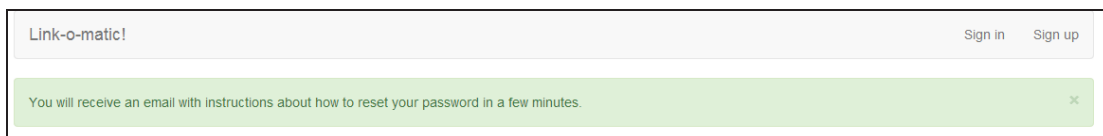
Figure 2-4. Forgot Your Password Screen.



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

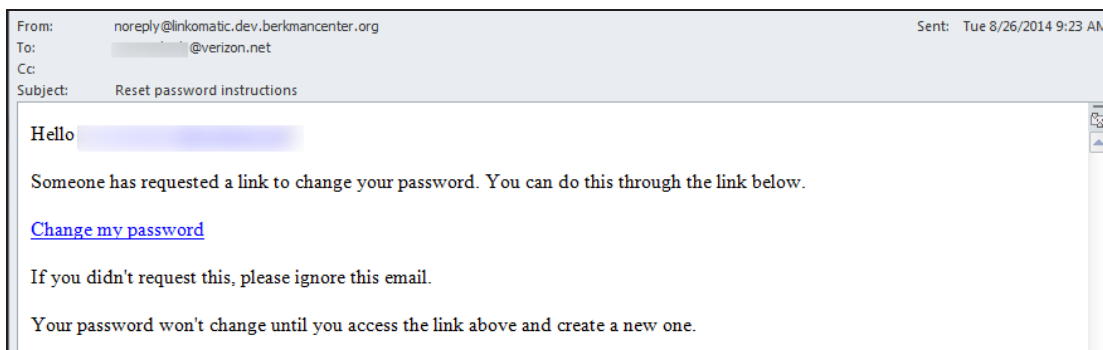
Link-o-matic displays a message indicating that you will receive an email message with instructions for resetting your password (Figure 2-5).

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).

Figure 2-7. Example of an Email Message for Resetting a Forgotten Password.

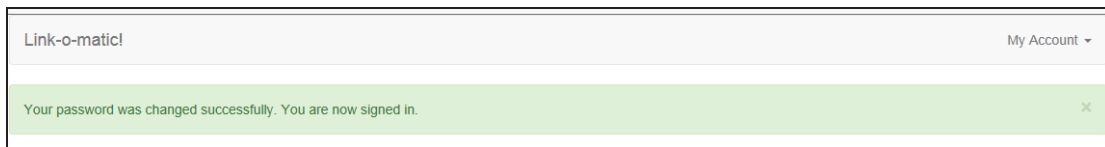


The screenshot shows an email interface for Link-o-matic! with a header bar containing the logo and 'Sign in' / 'Sign up' links. The main content area is titled 'Change your password' and contains two input fields labeled 'New password' and 'Confirm new password', followed by a 'Change my password' button. At the bottom are links for 'Sign in' and 'Sign up'.

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.



The screenshot shows a confirmation message in a green box: 'Your password was changed successfully. You are now signed in.' with a close button (X) on the right. The header bar shows the Link-o-matic! logo and a 'My Account' dropdown menu.

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.



The screenshot shows the 'My Account' dropdown menu open, displaying 'Edit' and 'Sign out' options. A red arrow points to the 'Sign out' option. The main content area shows 'Edit User' and an 'Email' field.

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

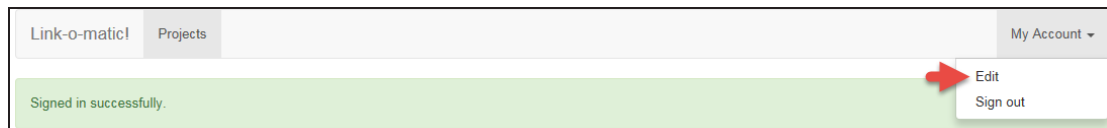
You can also cancel your Link-o-matic account.

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.



Link-o-matic then displays the Edit User screen (Figure 3-2).

Figure 3-2. Edit User Screen.

Link-o-matic! Projects My Account ▾

Edit User

Email

Password *(leave blank if you don't want to change it)*

Password confirmation

Current password *(we need your current password to confirm your changes)*

User EAD Settings ▾

Link text

EAD Template ☒

Owner code

Thumbnail URL

Cancel my account

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.

Link-o-matic! My Account ▾

You updated your account successfully.

Viewing projects

In Link-o-matic, a *project* is 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.

The screenshot shows the 'Projects' section of the Link-o-matic interface. At the top, there is a header 'Projects' with a link 'Create New Project'. Below this, there are two project cards. The first card is for the 'Default Project' and the second is for a 'Sample project'. Each card contains a 'Findings Aids' section with a list of finding aids and a 'Load New Finding Aid' button. Below the finding aids, there is a 'Settings' section with an 'Edit' link and a table of settings.

Projects [Create New Project](#)

Default Project [Delete](#)

Findings Aids

- [Example finding aid](#) ✕
- [Harvard University. Department of Athletics. Records of the Harvard University Department of Athletics : team photographs, 1956-1972 : an inventory](#) ✕
- [Harvard University. Department of Athletics. Records of the Harvard University Department of Athletics : team photographs, 1956-1972 : an inventory](#) ✕
- [Harvard University. Department of Athletics. Records of the Harvard University Department of Athletics : team photographs, 1956-1972 : an inventory](#) ✕

[Load New Finding Aid](#)

Settings [Edit](#)

Link Text:	"Click here for digital copy"
EAD Template:	Without Thumbnail
Owner code:	
Default Thumbnail:	None

Sample project [Delete](#)

Findings Aids

[Load New Finding Aid](#)

Settings [Edit](#)

Link Text:	"Click here for digital copy"
EAD Template:	With Thumbnail
Owner code:	
Default Thumbnail:	None

Information displayed for each project

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

Project Information	Description
Create New Project	Link that displays the New Project screen. See the topic Creating a new project on page 15.
Project name	A name assigned when you created the project. Link-o-matic also provides a project named Default Project.
Delete	Link that enables you to remove the project.

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	<p>Displays the following settings that apply to all finding aids that are linked under this project:</p> <ul style="list-style-type: none"> • Link Text • EAD Template • Owner Code • Default Thumbnail <p>The project settings override any user settings. For the hierarchy of settings, see Appendix A, EAD Settings on page 21.</p>
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.

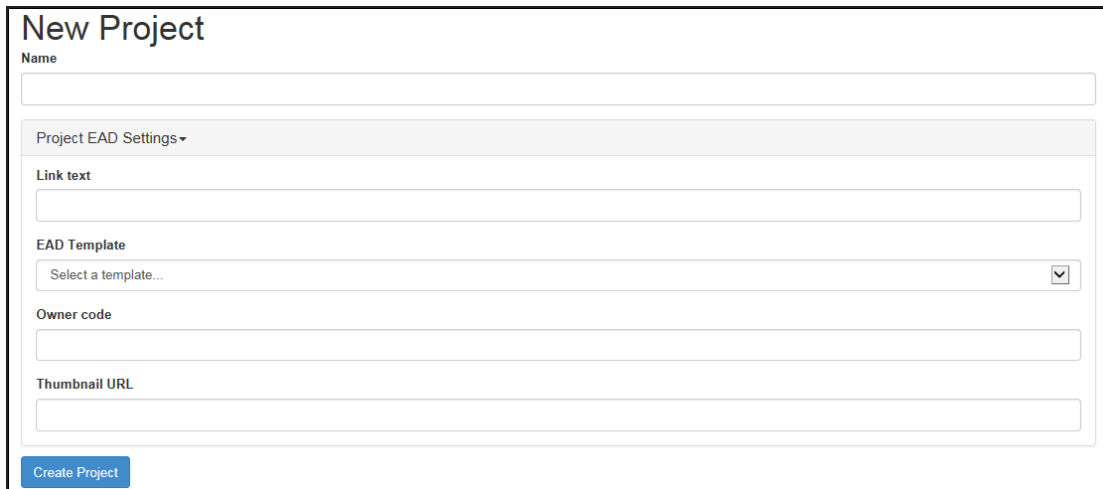
Creating a new project

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.



The screenshot shows the 'New Project' form. It has a title 'New Project' at the top. Below it is a 'Name' label and a text input field. Then there is a section titled 'Project EAD Settings' with a dropdown arrow. Inside this section are four fields: 'Link text' with a text input field, 'EAD Template' with a dropdown menu showing 'Select a template...' and a checkmark icon, 'Owner code' with a text input field, and 'Thumbnail URL' with a text input field. At the bottom left of the form is a blue button labeled 'Create Project'.

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://hul.harvard.edu/ois/systems/mat/documentation.html>.

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.

Load new finding aid

EAD Source

EAD File

Upload an EAD file from your local machine.

OR

URL

The persistent URL to the finding aid. These typically start with "nrs.harvard.edu".

Owner Code

What is the owner code for this finding aid? Leave this blank if you want it to be pulled from the URL.

Name

What would you like this finding aid to be called in Link-o-matic? Leave the name blank to have it pulled from the finding aid.

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.

University Department of Athletics : team photographs, 1956-1972 : an inventory

Owner code

Test Owner Code

Validate

Download EAD

Finding Aid EAD Settings ▾

Fetch URNs

Fetch URNs

Progress

Components

ID	Title	URNs
hua19013c00001	Team pictures, 1956-1957	
hua19013c00002	Varsity Squash Team Winter, 1957-1958	urn-3:HUL.ARCH:11111650
hua19013c00003	Varsity Golf Team Spring, 1959	urn-3:HUL.ARCH:11111651
hua19013c00004	Varsity Ski Team Winter, 1958-1959	urn-3:HUL.ARCH:11111652
hua19013c00005	Team pictures, 1957-1958	
hua19013c00006	Team pictures, 1958-1959	

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://hul.harvard.edu/ois/systems/mat/documentation.html>.

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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