

Related Services: Outside Tool and Document Delivery Service

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Outside Tool and Document Delivery Service (DDS) are available in PubMed. DDS allows users to order articles from a service or institution that has registered with LinkOut. Outside Tool places a link to a local service on every PubMed citation.

Outside Tool

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Introduction

Outside Tool allows an institution to place a link on every PubMed record. This link points back to a resource offered by the institution for their users. Outside Tool can be used to implement OpenURL-based and other types of services in PubMed. For more information about PubMed and OpenURL, see the LinkOut, Outside Tool, and OpenURL FAQ [<http://www.ncbi.nlm.nih.gov/projects/linkout/doc/openurifaq.shtml>].

Libraries that would like to implement an OpenURL-based service should see Implementing OpenURL-based Services in PubMed.

To best serve the user community, NCBI tries to avoid “blind” links that do not provide useful and directly relevant information for the specific PubMed record. Therefore, to register an Outside Tool in PubMed, an institution must demonstrate that their service can provide relevant web-accessible resources for all PubMed records.

Examples of relevant resources include:

- **online full text**
- **library holdings via the local OPAC**
- **local document delivery service**
- **other resources approved by NCBI**

Search forms, tables of contents, journal home pages, bibliography building software, and other such resources that are not directly relevant to the PubMed record do not qualify as relevant resources.

All resources must be in place before a request to set up an Outside Tool can be processed.

How It Works

PubMed links to your service by attaching the PubMed ID (PMID) of the current PubMed citation to the end of the URL of your service. For example:

Your tool URL: <http://goodmedical.edu/mytool.cgi?>

PMID: 12345678

Resulting URL: <http://goodmedical.edu/mytool.cgi?12345678>

Please note that PubMed will only pass back the PMID. Your institution can then use the Entrez Utilities to obtain citation information.

You can test your service by constructing URLs to your service as described above.

Register Your Service

Note: All services must be evaluated before a registration request is submitted. All qualified resources should be in place before a registration request is submitted.

Send an email to lib-linkout@ncbi.nlm.nih.gov. Use the subject line: "Request to set up an Outside Tool". In the message body, include the following:

1. Proof of providing relevant resources for test records. List the PMIDs tested, the complete URL constructed for testing, and describe the resource your service provides for each one.
2. If applicable, a username and password that NCBI staff can use temporarily to view the service, including the ILL form. No requests will be sent; it is only necessary that we view the services. NCBI does not retain any username/password that is provided for testing purposes.
3. The base URL of your local service. For example: <http://goodlibrary.edu/libtool.cgi?sid=Entrez:PubMed&id=pmid>:
4. Name and postal address for the institution, name, email address, and phone number of a contact person.
5. The URL of an icon that will identify your institution's service in PubMed. For icon specifications (size, file format, etc.) and to see examples of icons currently in use, see LinkOut Technical Information: Icons [<http://www.ncbi.nlm.nih.gov/books/bv.fcgi?rid=helplinkout.section.files.icons>]. URL for icon must point directly to the icon file in your server.
6. The URL of an HTML help page that explains your service, to be used in My NCBI.
7. A short label (less than 50 characters) that identifies your institution and local service in My NCBI. Outside Tools are listed alphabetically in My NCBI, consequently we recommend beginning the label with your institution name. NCBI reserves the right to adjust this label.
8. Indicate whether you would like a period of testing where your Outside Tool is not listed in My NCBI but is available through the otool parameter.

Use the following format in your email:

Subject: Request to set up an Outside Tool

- 1. Proof of relevant resources for test records**
- 2. Username and Password for services listed in the tool**
- 3. Base URL of your local service**
- 4. Institution name, postal address, contact name, contact email address and phone number**
- 5. URL of the tool icon**
- 6. URL of the tool help page**
- 7. Short label that identifies your institution**
- 8. Whether a testing period is desired**
- 9. LinkOut NameAbbr, if already using LinkOut**

NCBI staff will email the contact person within three weeks about your request.

Manage Your Outside Tool

After initial implementation of Outside Tool in PubMed by the LinkOut Team, libraries can manage their Outside Tool accounts through the Library Submission Utility [<http://www.ncbi.nlm.nih.gov/projects/linkout/doc/lbsub-i.shtml>]. See the [Library Submission Utility](#) chapter of this manual. Please note that any changes to the Outside Tool settings or icon would take 48 hours to be implemented.

In the [Library Submission Utility](#) libraries can edit:

- Outside Tool contact(s) information
- Tool Settings (Outside Tool label, base URL, help page URL and allow listing in MyNCBI)
- Outside Tool icon (upload an icon)

Display Your Outside Tool Icons in PubMed

Once your Outside Tool has been implemented, users can activate your Tool in two ways, by accessing PubMed through a special URL or by using My NCBI.

Display Your Outside Tool Icons Using a Special URL

To display your Outside Tool icon, append *otool=NameAbbr* to the PubMed URL and enter PubMed through the resulting URL:

```
http://www.ncbi.nlm.nih.gov/sites/entrez?otool=NameAbbr
```

Replace *NameAbbr* with the Outside Tool User Name assigned by NCBI.

Appending **otool=NameAbbr** to the PubMed URL displays your Outside Tool icons in PubMed's AbstractPlus, Abstract, and Citation displays. Users click on your library's icon to access your Outside Tool.

The **otool=** parameter can also be appended to www.pubmed.gov.

You should create a button or link to this URL from your library website. Replace your current PubMed links (in your catalog, on subject pages, etc.) with this URL. You should also send out a general announcement so that other departments, faculty, etc. can update their websites and personal computers.

When a user enters PubMed through a special URL, a "cookie" is placed in the workstation (more about cookies [<http://www.ncbi.nlm.nih.gov/books/bv.fcgi?rid=helppubmed.section.pubmedhelp.Appendices#pubmed-helpCookies>]). This cookie instructs PubMed to display your Outside Tool icons. To use Outside Tool, the workstation must be able to accept cookies.

The cookie will expire after 8 hours of inactivity. To reactivate your icons, the user must enter PubMed through the special URL again.

For additional information on using special URLs to localize PubMed for your users, see [Localizing PubMed for your Users](#).

Display Your Outside Tool Icons Using My NCBI

To activate your Outside Tool using My NCBI, users should:

- Sign in to My NCBI (more about My NCBI [http://www.ncbi.nlm.nih.gov/books/bv.fcgi?rid=helpmyncbi.section.MyNCBI.Getting_Started]).
- Click [Outside Tool](#) in the blue sidebar menu.
- Select your library from the list of Outside Tools.

When a user selects an Outside Tool in My NCBI, the Outside Tool preference remains in effect on a workstation until the user changes the Outside Tool option or signs out of My NCBI.

To display your Outside Tool icon and other My NCBI settings without signing in to My NCBI, set up a shared My NCBI account. LinkOut and Outside Tool icons, Document Delivery preferences, filter tabs, and highlighting selections can be shared.

Document Delivery Service (DDS)

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Introduction

Document Delivery Service (DDS) allows PubMed users to order articles described in PubMed citations from a service of their choice. Institutions may register a local document delivery service with NCBI using the procedures outlined below.

Documents are ordered by clicking on the check box to the left of each citation and selecting [Order](#) from the [Send To](#) pull-down menu. By default, PubMed will send the order to Loansome Doc (more about Loansome Doc [http://www.nlm.nih.gov/loansomedoc/loansome_home.html].) A different provider can be designated as described in [Set Your DDS Preference in PubMed](#).

Evaluate Your DDS

To register a document delivery service, an institution must have a program at their site that:

- accepts PubMed ID numbers (PMID) sent through the [Order](#) option of the [Send To](#) pull-down menu
- retrieves complete citation information for the articles using the PMIDs
- creates a document order form with the citation information pre-filled for the user

To be registered as a Document Delivery Service, the program must combine a Base URL with PubMed's DDS "tail" (`?CALLING_SYSTEM=PubMed&BACK_URL=http://www.ncbi.nlm.nih.gov/sites/entrez?`

`Db=pubmed&PMID_1=`). Using the resulting URL, your program should retrieve the citation information for the document. One method is to use the Entrez Utilities [http://www.ncbi.nlm.nih.gov/books/bv.fcgi?rid=help-pubmed.section.pubmedhelp.Other_Services_Inclu#pubmedhelp.Using_the_Eutilities]: ESummary or EFetch. After retrieving the citation information, your server should present a document order form that has the citation information already filled in.

To test your document delivery service with PubMed, you can construct a URL to your service and retrieve PubMed records by their PMIDs. To do this, combine the base URL of your service with PubMed's DDS "tail" and add a PMID.

Example

Base URL: `http://DocDelBaseUrl`

Tail: `?CALLING_SYSTEM=PubMed&BACK_URL=http://www.ncbi.nlm.nih.gov/sites/entrez?Db=pubmed&PMID_1=`

PMID: 11149990

Resulting URL:

Example

```
http://DocDelBaseUrl?CALLING_SYSTEM=PubMed&BACK_URL=http://www.ncbi.nlm.nih.gov/sites/entrez?
Db=pubmed&PMID_1=11149990
```

DDS allows users to request up to 100 articles at a time. All PMIDs will append to the URL:

```
http://DocDelBaseUrl?CALLING_SYSTEM=PubMed&BACK_URL=http://www.ncbi.nlm.nih.gov/sites/entrez?Db=pubmed&
PMID_1=11149990&PMID_2=1234567&PMID_xxx=
```

When your program is able to provide an order form with the citation information pre-filled, your Document Delivery Service can be implemented in PubMed.

Register Your DDS

Before submitting a request to register your DDS in PubMed, complete the evaluation process described in [Evaluating Your DDS](#).

Send an email with the subject "Request to Set Up a Document Delivery Service" to: lib-link-out@ncbi.nlm.nih.gov. In the message body, include the following:

1. Name, email address, and phone number of a contact person.
2. Name and postal address of your institution.
3. The URL for your service that you developed in Step 1.
4. The URL of an icon that identifies your service in My NCBI (more about My NCBI [http://www.ncbi.nlm.nih.gov/books/bv.fcgi?rid=helppubmed.section.pubmedhelp.My_NCBI]). For icon specifications (size, file format, etc.) and to see examples of icons currently in use, see [LinkOut Technical Information: Icons](#) [<http://www.ncbi.nlm.nih.gov/books/bv.fcgi?rid=helplinkout.section.files.icons>].
5. The URL of an HTML help page that explains your service, to be used in My NCBI.
6. A short label (less than 50 characters) that identifies your service, to be used in My NCBI. NCBI reserves the right to adjust this label.
7. Indicate whether you would like a testing period where your service is not listed in My NCBI but is available using the tool parameter.

Use the following format in your email:

Subject: Request to set up a Document Delivery Service

- 1. Contact name, email address and phone number**
- 2. Institution name and postal address**
- 3. Base URL of your local service**
- 4. Icon URL for your institution**
- 5. URL of the DDS help page**
- 6. Short label that identifies your institution**
- 7. Whether a testing period is desired**
- 8. LinkOut NameAbbr, if already using LinkOut**

NCBI staff will email the contact person within three weeks about your request.

Manage Your DDS

After initial implementation of DDS in PubMed by the LinkOut Team, libraries manage their DDS accounts through the Library Submission Utility [<http://www.ncbi.nlm.nih.gov/projects/linkout/doc/lbsub-i.shtml>]. Please note that any changes to the Outside Tool settings or icon would take 48 hours to be implemented.

In the [Library Submission Utility](#) libraries can edit:

- DDS contact(s) information
- DDS Settings (DDS label, base URL, help page URL and allow listing in MyNCBI)
- DDS icon (upload an icon)

Set Your DDS Preference in PubMed

A user can set a DDS preference in PubMed in two ways, by entering PubMed through a special URL or by using My NCBI.

Set Your DDS Preference Using a Special URL

To set your DDS preference, append *tool=NameAbbr* to the PubMed URL and enter PubMed through the resulting URL:

```
http://www.ncbi.nlm.nih.gov/sites/entrez?tool=NameAbbr
```

Replace *NameAbbr* with the DDS User Name assigned by NCBI.

Appending **tool=NameAbbr** to the PubMed URL changes the Order option. Orders will be sent to the specified service instead of to Loansome Doc. The DDS preference will be in effect on a workstation until the user changes it or is inactive for 8 hours.

The **tool=** parameter can also be appended to www.pubmed.gov.

You should create a button or link to this URL from your library website. Replace your current PubMed links (in your catalog, on subject pages, etc) with this URL. You should also send out a general announcement so that other departments, faculty, etc. can update their websites and personal computers.

When a user enters PubMed through a special URL, a “cookie” is placed in the workstation (more about cookies [<http://www.ncbi.nlm.nih.gov/books/bv.fcgi?rid=helppubmed.section.pubmedhelp.Appendices#pubmed-helpCookies>]). This cookie instructs PubMed to set your DDS preference. To set your DDS preference, the workstation must be able to accept cookies.

The cookie will expire after 8 hours of inactivity. When the cookie expires, the Order option will be reset to send orders to Loansome Doc. To change the DDS preference, the user must enter PubMed through the special URL again.

For additional information on using special URLs to localize PubMed for your users, see [Localizing PubMed for your Users](#).

Set Your DDS Preference Using My NCBI

To set your DDS preference using My NCBI, users should:

1. Sign in to My NCBI (more about My NCBI [http://www.ncbi.nlm.nih.gov/books/bv.fcgi?rid=helpmyncbi.section.MyNCBI.Getting_Started]).
2. Click [Document Delivery](#) in the blue sidebar menu.
3. Select their preferred service from the list of Document Delivery Services.

When a user selects a DDS in My NCBI, the DDS preference is set on the workstation until the user changes the DDS option or signs out of My NCBI.

To set your DDS preference and display other My NCBI settings without signing in to My NCBI, set up a shared My NCBI account. LinkOut and Outside Tool icons, Document Delivery preferences, filter tabs, and highlighting selections can be shared.

Order Articles Cited in PubMed

To learn how to order articles, see the PubMed Tutorial [http://www.nlm.nih.gov/bsd/pubmed_tutorial/m3016.html].