

MANAGING AUTOALERTS

e-HLbc Tips & Tricks session for HLABC 2009 AGM

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A. Speed Outline of Process

- a. Do the reference interview and search
- b. Save the search as an Alert
- c. Maintain and modify as needed

B. Rationale of Library-Managed Alerts

- a. Very common interests can be covered with just a few searches
- b. Saves time on big, big searches likely to require follow up for an extended time, such as clinical trials or systematic reviews.
- c. Promotes organizational learning (e.g. infection control, other ongoing topics of concern)
- d. Efficient change management e.g. Mesh, interface, renewals, IP access
- e. Problem for one is problem for all
- f. Reduces barriers for end-users.
- g. No need to limit or restrict individual alerts!

C. Managing Across Multiple Platforms

- a. Username / p'word consistency
- b. All emails must be complete and correct
- c. Track your searches externally

You may create a database or spreadsheet, or a one page form to fill in manually and file. On the reverse of this page are the items we have found useful in the long term.

Fields

1. **Search Name:** *aka title, or ID. This is as you saved it @ vendor's server.*
2. **Date Added:** *How old is this?*
3. **Date Modified:** *When was the last time I looked at it?*
4. **Date Deleted:** *Save the strategy but record when it was deleted from the vendor's server. You never know when you'll need a search reconstituted*
5. **Notes:** *Particularly of changes made or potential issues to watch, and parallel searches in other indexes*
6. **Name-Dept:** *Distribution list of recipients, because emails don't tell it all.*
7. **e-mail address:** *Just the full email exactly as it appears in the vendor server*
8. **Bibliographic Manager:** *e.g. endnote, refworks, etc. Also can be used to note down training needs.*
9. **Database:** *Where are we? This is a two part field for us, eg. Ovid-Medline, Ebsco-Medline, PubMed-Medline.*
10. **Search Strategy:** *Copied directly from the vendor server. Keep this updated!*
11. **Format for Printing:** *e.g text? Html? Vendor's format or tagged or bibliographic mgr?*
12. **Fields printed:** *Literally, what field options. Frankly, this should normally be ALL on the assumption that at least someone on the distribution will want to dump into a bibliographic manager. However, some users request a shorter field list. Not all vendors always show you all the fields.*
13. **Added by:** *Librarian's initials (so blame can be correctly avoided)*

D. The Standard Procedure, Step-By-Step:

- a. Detailed reference interview with initial users. Obtain or provide sample citations to confirm understanding; check for specific needs e.g. bibliographic mgt software. Confirm ALL email addresses
- b. Create record for managing the search. (Whatever works for you).
- c. Log in to vendor server with AutoAlert manager username & p'word
- d. Perform the search. Clean up your strategy as much as you can, e.g. deleting red herrings and correcting confusing search order.
- e. Save your search as an Alert on the vendor's server using the NAME you selected. Enter the full and correct email addresses for distribution.
- f. Make notes in your record of the search set up. (The RSS should be available at this point)
- g. Send an email to the distribution list with instructions on using their AutoAlert. (see below / attached)
- h. If the purpose of your Alert is RSS or other unusual uses, set up your broadcast system and publicize it.

E. Annual or Central Maintenance

- a. Seasonal shut-down at NLM. Medline searches will halt and then flood in Dec / Jan.
- b. Tech changes: vendor changes, ip address changes, interface changes, firewall changes. Fortunately rare.
- c. User changes: stopping, starting, changing emails, changing search needs, changing bibliographic manager, switching to a new individual. If you are lucky they'll tell you.
- d. Data changes: Annual MESH updates.

F. The Ovid way

<http://ovidsp.ovid.com/>

- Saved Searches / Alerts at top left
- All searches listed, grouped by type of save, then database saved in.
- RSS is possible but awkward. The actual rss “url” is never showed; the Ovid one is mms not rss. Works with some “readers” (browsers) but how would we drop it into 2.0 utilities?

Pro	Con	Watch
Search can be edited line-by-line in the Saved Searches management interface.	RSS not easily available. Content of results can confuse users (e.g. “Full Text” links)	Email subject line automatically includes AutoAlert: and the name of the search as saved.

G. The Ebsco way

<http://search.ebscohost.com/>

- Search History/Alerts below search box
- Retrieve Alerts
- the following RSS Readers are compatible with EBSCOhost at this time (Jan 2009):
 - o My Yahoo!
 - o CustomReader
 - o FeedReader
 - o Wizz RSS
 - o Bloglines
 - o Pluck
 - o Safari 2.0
 - o NetNewsWire
 - o NewsGator
 - o Google Reader

Pro	Con	Watch
RSS feeds Specific databases or features may be preferred.	Searches cannot be edited once saved – they must be re-made. First run of the search drops the entire history on you, freaking out new users.	Include <i>everything</i> you want in the email Subject – nothing else is added. Searches automatically expire if not manually renewed.

H. The PubMed way (myNCBI)

<http://pubmed.gov>

Pro	Con	Watch
Universal access	Searches are saved as a single line, which makes complex searches even more complex. Results are sent to only a single email, and must be redistributed from there.	

The following is sent from an email "template" or "stationery" or MS Outlook saved email message (with properties set to Read Only), so that only details ever need to be re-typed.

From: Clement, Krista
Sent: Thursday, March 26, 2009 3:12 PM
To: igm
Subject: New Autoalert : LungPETCT

Hello,

You should now begin receiving your Medline 'AutoAlert' search results on **TOPIC**. It is known as **NAME** in the Library system. *Please keep this email for future reference.*

New citations and abstracts will arrive in your email when the database is updated, normally each week. <Notes on expected search volume, limitations or details of the search go here)

If you wish to request any full text copies, please contact your local BCCA Library, or Library Requests on the email system. Full text journals can also be found at:

<http://atoz.ebsco.com/titles.asp?ld=XXXXX>

If you want any changes to the search, please contact me. I hope these searches will be very useful for you.

Krista Clement, BCCA Librarian
Medline OVID AutoAlerts

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Centre for the Southern Interior
(250) 712-3966 Local 6821
KClement@bccancer.bc.ca

Full text journals at : <http://atoz.ebsco.com/titles.asp?ld=XXXXX>

PS. **AutoAlerts can be managed using "RefWorks,"** the bibliographic citation database program available to Agency staff.

* Never used RefWorks? Contact your local BCCA Library for more info.

Ovid

For Direct Export:

1. Follow the **link** from your AutoAlert email to open up OVID in a new browser window. Select the references you want to export.
2. Click on **Results Manager**.
3. Select **Complete Reference** in the **Fields** section.
4. Select the **Direct Export** format.

5. Click the **Save** button.

6. Select **Export Citations to RefWorks** and **Continue**.

7. The export will open **RefWorks** if it is not already open and automatically import the references. *Note that on some computers, RefWorks must NOT be open for this step to work properly. If you have problems, log out of Refworks and close all browser windows except OVID, and try to save the set again.

8. Your records should appear in the **Last Imported Folder**.

Note: If you do not see the Export Citations to RefWorks option contact your BCCA Library.

To Manually Save and Export Records:

1. Open the AutoAlert email you received.

2. In MS Outlook, from the File menu, "Save" your AutoAlert email as a text file, somewhere you can find it again easily.

3. Log in to **RefWorks**.

4. Select **References/Import** from the toolbar.

5. Select **OVID** as the data source and **select the appropriate database**.

6. **Browse** to find the text file you saved to your computer.

7. Click **Import**.

8. Your records should appear in the **Last Imported Folder**.

Create and Test an Ovid AutoAlert.

1. **Log in** to the Ovid account you were given and go into a database.
2. Search for your own name as author.
3. Search for the phrases “in your dreams” or “hell freezes over.” If you get no or few results, try various truncation or boolean searches to get at least 3 results in your set.
4. Combine your author search with your keyword search (OR)
5. At the bottom right, “**Save Search History**”
6. When the new “Saved Search Manager” page appears, from the right pull down for “**Type,**” choose **AutoAlert**.
7. In recipients email address, type your own full webmail address if you wish to test this.
8. Examine the other options and make any changes you like. Save the search.
9. Go **BACK** into your **Saved Searches / Alerts** from the top of the page.
10. The search you saved should be listed under the database and date range you selected. Click the **eyeball** to view the strategy. Does it look messy? Were there any unused search lines?
11. Check the box next to your search and then **Delete** it. (Warning! The Warning box is not useful!)
12. Now return to your Main Search screen and remove from the strategy any unwanted search lines. Tidy up your strategy. Save the search again (you may use the same name).
13. Return to the Saved Searches / Alerts manager page. This time, when you find your search, click on the **Pencil** icon to edit your search.
14. **Add a new line** at the end of your search (insert arrow icon) and type “limit **##** to abstracts” (where **##** is the last displayed line of your search strategy).
15. Change any other settings and save the search again.
16. Now click on the “**Select Updates**” option at the bottom of the item box. **Check the box** next to the search name. Go back to the top or bottom of the window and click “**Run.**”
17. A new window will open with two pull-downs to allow you to select a **date range**. Pick a reasonable range and click “**Run.**”
18. You have emailed yourself any results which appeared between those two dates.

Now, complete the form below with the information on your search (do not copy out the whole strategy; that's something you can copy and paste):

1. Search Name:

2. Date Added:

5. Notes:

6. Name-Dept:

7. e-mail address:

8. Bibliographic Manager:

9. Database:

10. Search Strategy:

11. Format for Printing:

12. Fields printed:

13. Added by:

Create and Test an Ebsco Alert

1. **Log in** to the Ebsco account you were given and go into a database.
2. Search for your own name as author.
3. Search for the phrases “in your dreams” or “hell freezes over.” If you get no or few results, try various truncation or boolean searches to get at least 3 results in your set.
4. Combine your author search with your keyword search (OR)
5. In the light green bar below the search boxes but above the history, click on “**Save Searches / Alerts**”
6. When the new “Create or Edit saved searches” page appears, in the 7th box down, choose to “**Save Search As**”: **Alert**. This will bring up the rest of the fields you need.
7. In recipients email address, type your own full webmail address if you wish to test this.
8. Examine the other options and make any changes you like.. **Note** that a search cannot automatically run for more than one year.
9. **Save** the search. Notice in the information displayed, how your strategy appears.
10. Return to the main search window. Using “**Choose Databases**” link near the top left, re-select the same database to CLEAR all your history.
11. From the light green bar, to view or manage your alerts, you need to “**Retrieve Alerts.**”
12. The search you saved should be listed (it would be an **alphabetical** list if there were many searches). Click on “**Edit Alert.**” Note that you cannot edit the strategy, only the actual sending options. Go **Back** to the list of searches.
13. Check the box next to your search and then click “**Retrieve Alert**” to load it into the main database search history.
14. Remove from the strategy any unwanted search lines. Tidy up your strategy. **Add a limit** to your search (such as English or Abstracts).
15. Save the search again (you will have to use a new name).
16. Open Retrieve Alerts page and “**Edit**” the new search. Look at the bottom of the page to see how your new strategy is displayed.

17. There is no easy way to send a sub-set of an Ebsco alert. You can re-run the search, then limit by date and email that set from the Ebsco folder to the distribution list.

Now, complete the form below with the information on your search (in Ebsco the easiest way to copy/paste the search strategy is to click Print Search History in the main search window):

1. Search Name:

2. Date Added:

5. Notes:

6. Name-Dept:

7. e-mail address:

8. Bibliographic Manager:

9. Database:

10. Search Strategy:

11. Format for Printing:

12. Fields printed:

13. Added by: