Last Updated: 52, 2.02



This book contains information on how to use My NCBI, a tool developed by the National Center for Biotechnology Information (NCBI).

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Created: December 13, 2010; Revised: June 28, 2021.

My NCBI saves searches and results from multiple NCBI databases and it features an option to automatically update and e-mail search results from your saved searches. My NCBI includes other features that help you save PubMed citations to your articles and manage peer review article compliance with the NIH Public Access Policy (My Bibliography), create online professional profiles (SciENcv), highlight search terms, and set up Outside Tool preferences for PubMed.

What Is My NCBI?

My NCBI is a tool that retains user information and database preferences to provide customized services for many NCBI databases. It allows you to save searches, select display formats, filtering options, and set up automatic searches that are sent by e-mail. My NCBI includes other features that help you save your citations and manage peer reviewed article compliance with the NIH Public Access Policy (My Bibliography), create online professional profiles (SciENcv), highlight search terms, and set up Outside Tool preferences for PubMed.

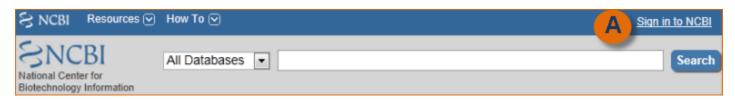
To use My NCBI, your Web browser must accept cookies and allow pop-ups from NCBI Web pages.

Section Contents

- Accessing My NCBI
- Signing in to My NCBI
- Adding a Partner Sign in option to an Existing My NCBI account
- If You Forget Your My NCBI Username or Password

Accessing My NCBI

Use the NCBI link to sign in to My NCBI. This link can be accessed from any NCBI database and it appears at the top right of the screen (A). The URL to the login page is https://www.ncbi.nlm.nih.gov/account/



Signing in to My NCBI

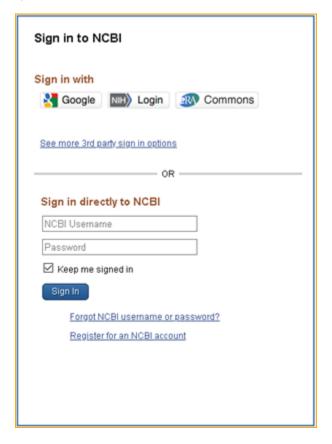
There are multiple options to sign in to a My NCBI account: using a username and password associated with an eRA account or an NIH account, or using a username and password associated with a partner organization. Partner organizations include research organizations and commercial Web sites using either an InCommon or OpenID standard to authenticate users. To see a list of all participating partner organizations, click "See more 3rd party sign in options."

NCBI started the transition to use only federated account credentials for NCBI account login on June 1st, 2021. The deadline for transitioning all NCBI accounts to 3rd-party only login is June 2022. Please read the below FAQs and write to info@ncbi.nlm.nih.gov if you have any questions.

https://ncbiinsights.ncbi.nlm.nih.gov/ncbi-login-retirement-faqs

Journal publishers who use My NCBI login for PMDM should write to publisher@ncbi.nlm.nih.gov for feedback on login or access to PMDM.

- Signing in using an eRA or NIH username and password
- Signing in using a partner organization username and password



Signing in using an eRA or NIH username and password

Start at the NCBI login page https://www.ncbi.nlm.nih.gov/account/

- 1. Enter your eRA or NIH username and password.
- 2. Check the **Keep me signed in** box to automatically activate My NCBI each time you use any NCBI database. You should not check the box when using a public computer, because your account will remain active for anyone who later uses the same computer. You can sign out at any time by clicking on **Sign Out** on the upper right corner of the page.

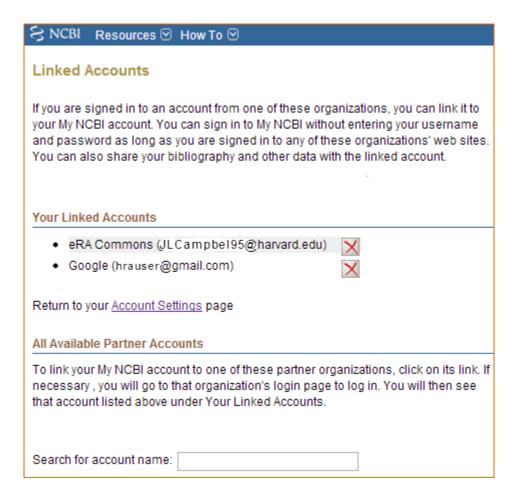
Signing in using a partner organization username and password

Start at the NCBI login page https://www.ncbi.nlm.nih.gov/account/

- 1. Select an organization from the 3^{rd} party options. My NCBI will link to the partner organization login page.
- 2. Enter the username and password registered with the partner organization.
- 3. Link to your existing My NCBI account or create a new My NCBI account.

After the accounts are linked, you should be able to access your My NCBI account while signed into your partner organization account, and you will be able to download data to create a SciENcv profile.

To **remove** a linked account, click on your username on the NCBI header to access the Account Settings page. Click the Change button under "Linked Accounts," and then click the inext to the account that you wish to remove.



Note:

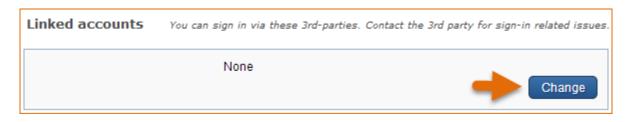
- A checked **Keep me signed** in box saves your My NCBI preferences on your computer in a persistent cookie file. It will also retain your password so that you do not need to sign in again. When using a public computer do not check this option
- If the Keep me signed in box is not checked, you will be automatically signed out when you close your Web browser
- Using NCBI databases without signing in to My NCBI means that after eight (8) hours of inactivity, all history and preferences will be lost

Adding a Partner Organization as Sign in option to an Existing My NCBI account

- 1. Start at the NCBI login page. Enter your My NCBI username and password.
- 2. Click on your username on the NCBI header to access the Account Settings page.



3. Click the Change button under "Linked Accounts."



- 4. Under "All available partner accounts," search for the partner organization you wish to link to your NCBI account.
- 5. Click on the partner organization link presented to you. NCBI will link to the partner organization login page.
- 6. Enter the username and password registered with the partner organization. Accept the **NIH login request for permission**.
- 7. You will be redirected to My NCBI where the added partner organization will appear under "Your Linked Accounts."

After the accounts are linked, you should be able to access your My NCBI account while signed into your partner organization account. Your NCBI account can be linked to multiple partner organizations (see example in image above). To **remove** a linked account, click the inext to the account that you wish to delete.

Note:

- If your institution is not included in the partner organization list, ask your identity system administrators contact nihfederationrequest@mail.nih.gov.
- If you have multiple NCBI accounts and you wish to merge all your data in to one account, write to info@ncbi.nlm.nih.gov and provide the following information: NCBI usernames, eRA Commons username, and the e-mail addresses associated with the accounts.

If You Forget Your My NCBI Username or Password

NCBI will transition to use only federated account credentials for NCBI account login starting June 1st, 2021. Please read the below announcement and write to info@ncbi.nlm.nih.gov if you have any questions.

https://ncbiinsights.ncbi.nlm.nih.gov/2021/01/05/important-changes-ncbi-accounts-2021/

In case you forget your username or password:

- 1. Click Forgot username or password on the NCBI Sign In page.
- 2. Enter your e-mail address or username.
- 3. Click Password.
- 4. An e-mail will be sent to the e-mail address you provided with your username information and a link to reset your password.

Saving and Managing Searches

Created: December 13, 2010; Revised: April 4, 2023.

The Saved Searches feature facilitates saving search queries for NCBI databases, and provides automatic e-mail updates for saved searches, which can be set up on a daily, weekly, or monthly basis.

NCBI started the transition to use only federated account credentials for NCBI account login on June 1st, 2021. The deadline for transitioning all NCBI accounts to 3rd-party only login is June 2022. Please read the below FAQs and write to info@ncbi.nlm.nih.gov if you have any questions.

https://ncbiinsights.ncbi.nlm.nih.gov/ncbi-login-retirement-faqs

Section Contents

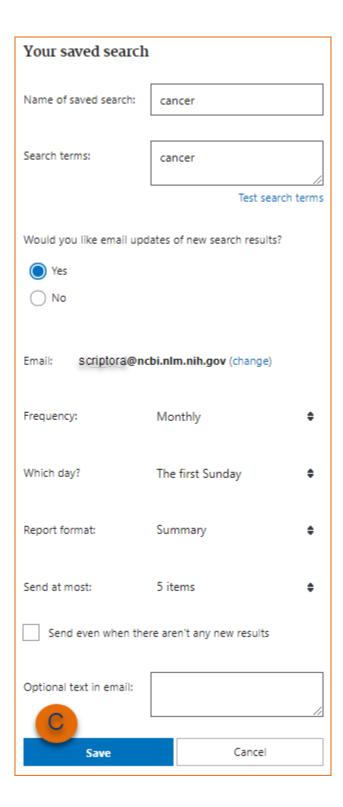
- Saving a Search in My NCBI
- Setting Up Automatic E-mail Updates
- Changing the E-mail Schedule of Your Updates
- Running Saved Searches and Checking for New Results
- Sorting Searches
- Modifying a Search Query
- Deleting a Search

Saving a Search in My NCBI

- 1. On any database page, run a search—make sure you are signed in to NCBI (B in image below).
- 2. In PubMed, click on Create alert, located below the search box. (A). If you are using other NCBI databases, click Save search.



- 3. You will be guided to your My NCBI Saved searches page where you may edit the name of the search; up to 100 characters are allowed. The name of the saved search will be included in the Subject line of the automatic email update messages.
- 4. If the database you searched supports e-mail updates, you will be prompted to set up automated e-mail preferences at this time. Or, if you prefer, this can be set up at a later time. Click Save. (C in image below.)



Note:

- Your saved searches will be listed in the "Saved Searches" section of My NCBI. Searches are grouped per database and listed by the date they were saved for the first time
- Dates and date ranges are not advisable for saved searches
- Links to Related Citations cannot be saved in My NCBI
- Accounts that do not have any activity in two years will be deleted

Setting up Automatic E-mail Updates

In most NCBI databases*, when you click on **Create alert** you are asked if you would like to receive e-mail updates of new search results automatically. Automatic e-mail updates of search results are then sent according to the frequency you selected when saving your search in My NCBI (monthly, weekly, or daily). You can also choose a format (Summary, Abstract, Summary text, Abstract text, PubMed), optional text (up to 200 characters), and change the number of items to be sent (1, 5, 10, 20, 50, 100 or 200 items).

The text, which appears in the body of your e-mail updates, can be used to create a title for your search or any specific information you want. You may enter up to 100 characters for the search title. The name of the saved alert will be included in the Subject of your automated e-mail update messages. If you have trouble remembering your original search word or phrase(s), hover over the search name with your mouse in My NCBI - Saved Searches. It will display the original search word or phrase(s).

Automatic e-mail updates can only be sent to e-mail addresses that have been confirmed.

In the rare case of technical problems, updates may miss some citations. Users receiving automatic updates should use the option to link to view complete results to minimize the risk.

*NCBI databases that support e-mail updates are:

CDD, GEO DataSets, Genome, NLM Catalog, Nucleotide, PopSet, PubChem BioAssay, PubChem Compound, PubChem Substance, PubMed, PubMed Central, Protein, SNP, SRA, Structure, Taxonomy.

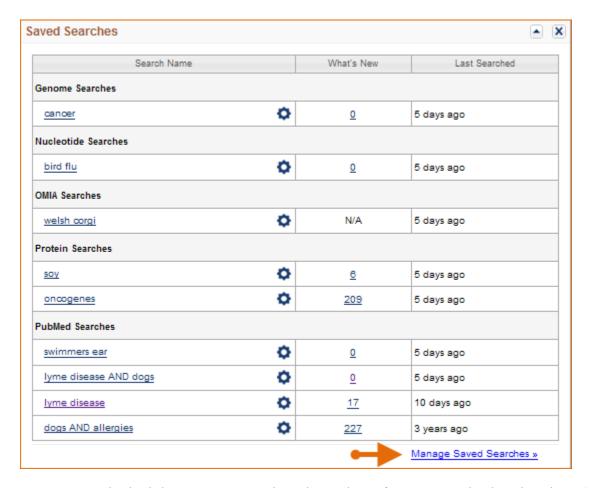
Note:

- If an e-mail update cannot be delivered three times, the e-mail address will be changed to invalid
- Each My NCBI account can only have one e-mail address
- In the event an update is not sent out on schedule or is incomplete, the next scheduled update will include the omitted items, if any
- E-mail updates may be affected by e-mail filtering SPAM software. Consider adding nih.gov domain to your e-mail "safe list." If your settings do not allow you to add e-mail addresses to a safe list, consult the help section of your e-mail program, or contact your e-mail/Internet provider's customer support to research your configuration options.

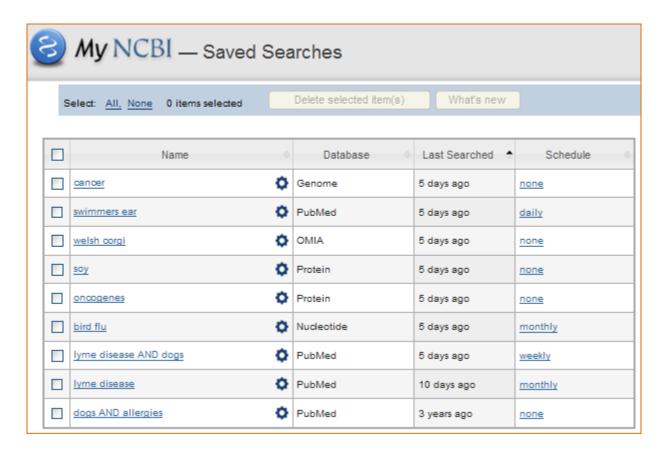
Changing the E-mail Schedule of Your Updates

To change or create a schedule for a saved alert, go to the **Saved Searches** portlet, click the gear icon next to the search you wish to edit, it will lead you to the same page where you initially saved a search and set up an email schedule. You can then change the e-mail schedule or any other settings you would like.

To see the e-mail schedule for all your saved searches at once, click "Manage Saved Searches."



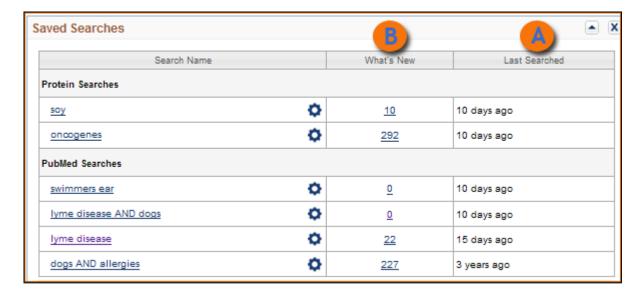
If you have set up an e-mail schedule to receive search updates, this information is displayed in the **Schedule** column. For searches that you have not set up a schedule or which were run in databases that do not offer this feature, you will see **none** displayed in the **Schedule** column.



Running Saved Searches and Checking for New Results

Sign in to My NCBI. Go to the **Saved Searches** portlet, where all searches are listed by database. Click on the search name to run the saved search in its respective database. This will not change the date displayed in the Last Searched column (A in the image below). To see the exact date when a search was last run on a database, place your mouse over the date shown under "Last Searched."

To check for new results, click on the hyperlinked number next to your saved search and under the **What's New** column (B). The hyperlinked number indicates how many new items were found since the last time the search was run. This action will change the date in the **Last Searched** column.



Not all NCBI databases support automatic updates. In those cases, the option What's New will not be available.

The below strategy is applied to searches with untagged terms and searches that do not use filters.

(search AND T1:T2[MHDA]) NOT (search[TIAB] AND 0001:T1[EDAT])

Where:

Search=saved search

T1=the date and time the search was last updated

T2=today's date and time

0001=the date that will include all citations

[MHDA]=the search tag for the MeSH date. This field reflects the date MeSH terms were added to the citation. Note: until MeSH terms are added, the MHDA value is the same as the EDAT

[EDAT]=the search tag for the date the citation was added to PubMed

[TIAB]=the search tag for words in the Title and Abstract fields

Example: The saved search is heart attack. The search was last updated on May 7, 2022 at 11:00 a.m. and today's update date and time is May 13, 2022 at 9:59 a.m.

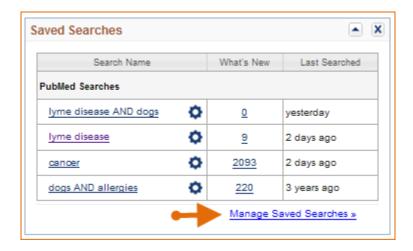
("myocardial infarction"[MeSH Terms] OR ("myocardial"[All Fields] AND "infarction"[All Fields]) OR "myocardial infarction"[All Fields] OR ("heart"[All Fields] AND "attack"[All Fields]) OR "heart attack"[All Fields] AND "2022/05/07 11:00"[MHDA]: "2022/05/13 09:59"[MHDA]) NOT (heart attack[TIAB] OR ("myocardial"[TIAB] AND "infarction"[TIAB]) OR "myocardial infarction"[TIAB] OR ("heart"[TIAB] AND "attack"[TIAB]) AND "0001"[EDAT]: "2022/05/07 11:00"[EDAT])

Note (for PubMed):

- My NCBI "remembers" the date and time new items were last retrieved for your Saved Searches. For strategies without search tags, it also considers whether citations that were in-process (not yet indexed) the last time you updated have since had MeSH terms applied, and are now retrieved by your strategy
- My NCBI saved searches that include search field tags or selections from the filters sidebar use an abbreviated "What's New" search to ensure that all citations are retrieved
- Searches that include PubMed search field tags FAU, IR, 1AU, LASTAU, CN, AU, PS, IP, TA, LA, PG, TI, TIAB, LID, JID, TT or VI, use the strategy: Search AND T1: T2 [EDAT]
- Searches that include search field tags other than the ones listed above, use the strategy: Search AND T1:T2 [MHDA]
- The My NCBI "What's New" feature will not retrieve citations for articles that were published more than one year ago
- To retrieve all new citations regardless of publication date, do not use either the "e-mail updates" or "What's New" options for My NCBI Saved Searches. Rather, run the saved search and combine it with a Create Date range. Use the format yyyy/mm/dd: yyyy/mm/dd [crdt]. For example: "lyme disease" [MeSH Terms] 2020/01/01:2020/06/18[crdt]. For further information on searching by date see Searching by Date.

Sorting Searches

To sort Saved Searches, click the "Manage Saved Searches" link.



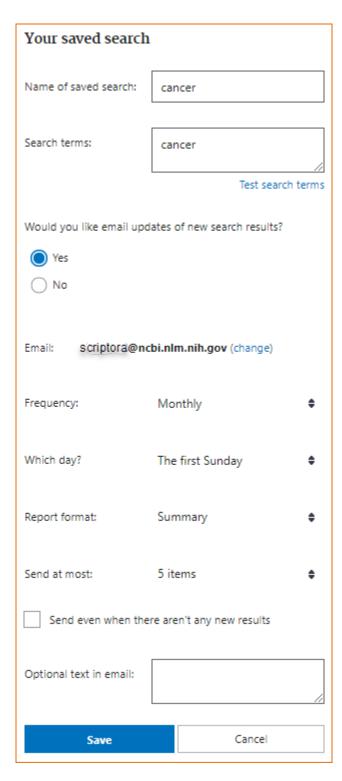
Click on a column name, and then on the small black arrow to change the ascending or descending order. Searches can be sorted:

- alphabetically by name
- by database
- by date last searched
- by schedule

Modifying a Search Query

To modify a saved search query:

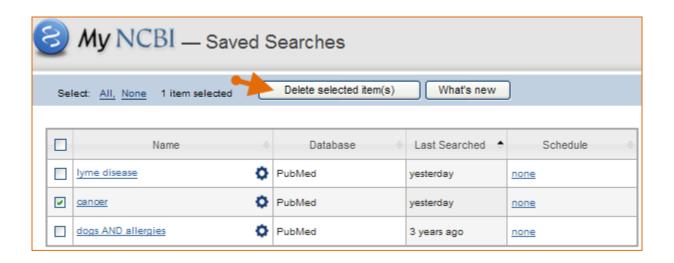
- 1. Sign in to My NCBI.
- 2. In the Saved Searches module; click the gear icon on next to the search you wish to edit; it will lead you to the same page where you initially saved a search.



- 3. You can then edit the search terms or any other settings available in this page.
- 4. Be sure to click **Save** to keep the amended search query.

Deleting a Search

- 1. Go to the Saved Searches page, click the "Manage Saved Searches" link.
- 2. Check the box next to the name of the search you want to delete.
- 3. Click the button Delete selected item(s). A confirmation window will appear, click OK.



Collections

Created: December 13, 2010; Revised: October 19, 2021.

Search results from many NCBI databases can be saved in My NCBI using the **Collections** feature. Citations to articles published by other authors can be stored in a collection. There is no limit to the number of collections you may store in My NCBI. In addition, collections can be made public to share with others.

NCBI started the transition to use only federated account credentials for NCBI account login on June 1st, 2021. The deadline for transitioning all NCBI accounts to 3rd-party only login is June 2022. Please read the below FAQs and write to info@ncbi.nlm.nih.gov if you have any questions.

https://ncbiinsights.ncbi.nlm.nih.gov/ncbi-login-retirement-faqs

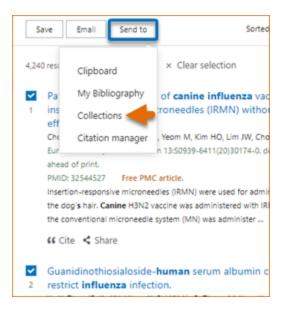
Section Contents

- Creating Collections and Adding to an existing collection
- Adding Records to Favorites
- Viewing and Sorting Collections
- Editing Collections
- Merging Collections
- Sharing Collections
- Deleting Collections

Creating Collections and Adding to an Existing Collection

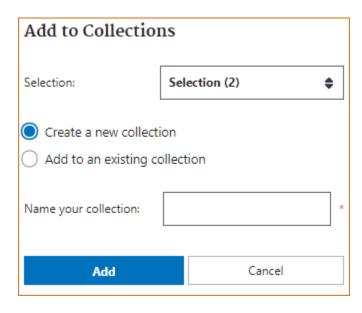
To save search results to a new collection:

- 1. Sign in to My NCBI. Run a search.
- 2. From the search results page, click the check box next to **items you want to save.** If you do not select any items all results up to 1,000 items will be sent to collections.
- 3. After selecting the items you wish to save, select **Collections** from the **Send to** pull-down menu (as shown in the image below).



My NCBI- Add to Collections will display. Select Create new collection (A in the image below).

4. Name your collection using a short, yet meaningful title. The collection name must be unique and contain fewer than 100 characters. Click "Add" to finish.

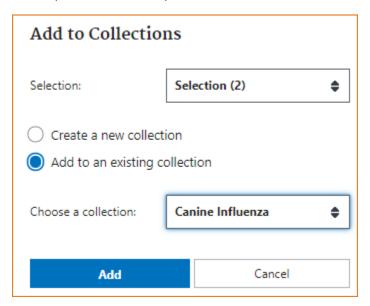


As you continue to build data collections, you may want to add new items to an existing collection. To add search results to an existing collection:

1 Follow steps 1 – 3 under Creating Collections

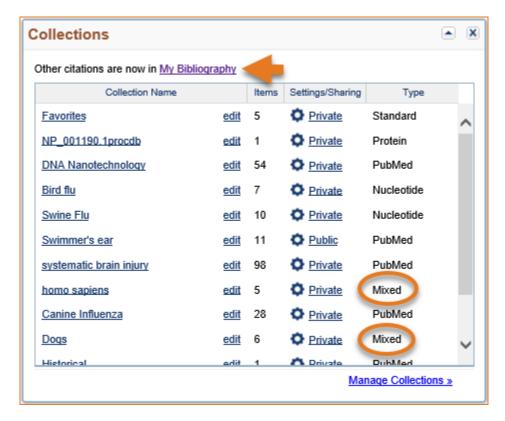
My NCBI- Add to Collections will display. Add to an existing collection will be selected by default.

2. Choose the collection into which you want to save your new items. Click Add to finish.

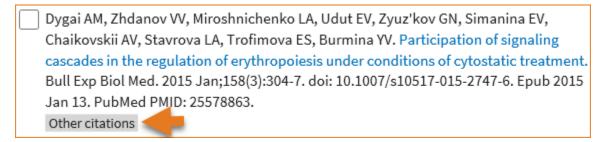


In addition, you may add data items from multiple NCBI databases to an existing collection. This type of collection is called "Mixed" because it has data items from multiple NCBI databases.

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In the above image note that "Other Citations" is no longer included in Collections. The "Other Citations" collection is now included in My Bibliography and records that are included in this collection display the label "Other Citations." The **Other Citations** collection is no longer supported in My Bibliography 3.0 and these citations do not display in users' My Bibliography public page.



Adding Records to Favorites

The Favorites collection is a feature of My NCBI which helps you keep a list of your preferred NCBI database records. This feature is active only while signed in to My NCBI and is currently active for PubMed.

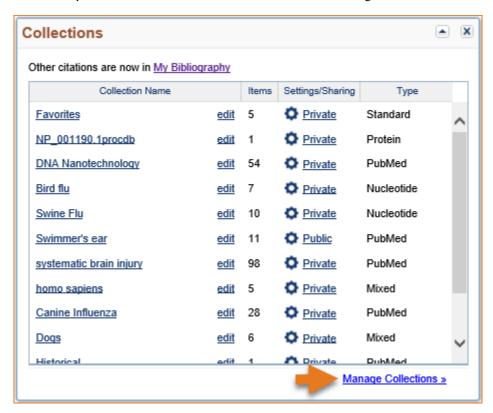
- 1. Log in to My NCBI. Run a search and select the abstract display.
- 2. In the **single Abstract** display you will see the **Favorite button**.
- 3. Click on the Favorite button and the star will turn white. A white star signals that the record has been saved in My NCBI Favorites



To remove a favorite record, click the Favorites star a second time, as the star turns blue, the record will be removed from your Favorites. Records in My NCBI **Favorites** can be deleted in the same manner as records in any other collection - see Deleting Collections.

Viewing and Sorting Collections

Sign in to My NCBI and go to Collections. The Collections window lists all your saved collections, the number of items stored per collection, the collection privacy status and the collection database record type. Click "Manage Collections" to sort your collections, view collections details, merge collections or delete collections.



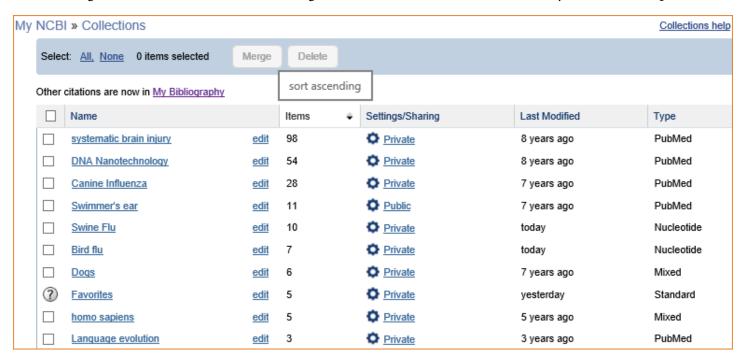
To view items stored in a collection, click the "Edit" link next to the Collection Name you would like to view. The resulting page displays all the items found in that collection.

Collection items are sorted by Date, however, they can also be sorted by Author or Title using the "Display Settings" drop-down menu.

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To sort **Collections** in your My NCBI account, click the link "Manage Collections" and then click the descending or ascending arrow next to the column headings. A black arrow indicates the currently selected sort option.



Collections can be sorted:

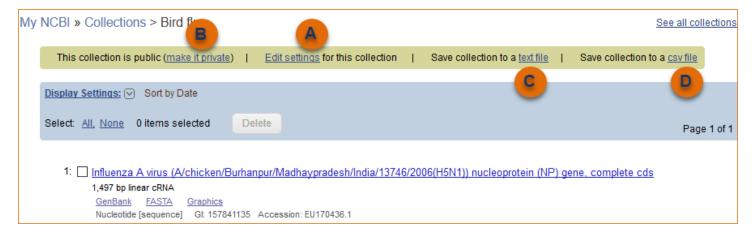
- alphabetically by name
- by number of items in the collection
- by privacy status
- by date last modified
- by database

Editing Collections

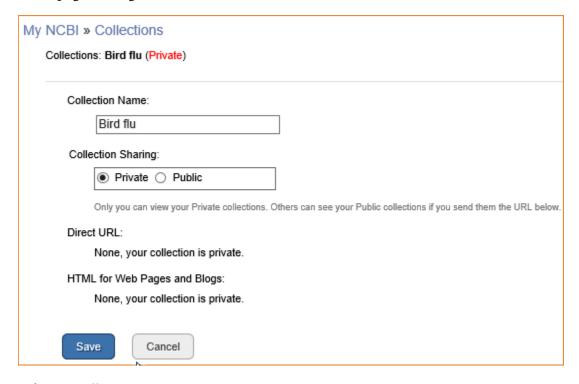
Collections can be renamed, made public to share with others, saved to a plain text or CSV file (to download to MS Excel or other programs), and individual items in a collection can be deleted. To delete entire collections, see Deleting Collections.

To change the name of a collection and/or to make a collection public:

- 1. Sign in to My NCBI and go to **Collections**. Click the gear icon next to the Collection Name you would like to rename.
- 2. On the resulting screen, you may also click on the link "Edit Settings for this collection" (**A** in the image below). The option to save a collection to a text file (**C**) or CSV (**D**) file is also available on this page.



3. Enter a new name for the collection in the Collection Name text box. You may also change the collection status from private to public in this page and obtain a URL to send to others or HTML to create a link to the collection in a Web page or blog.

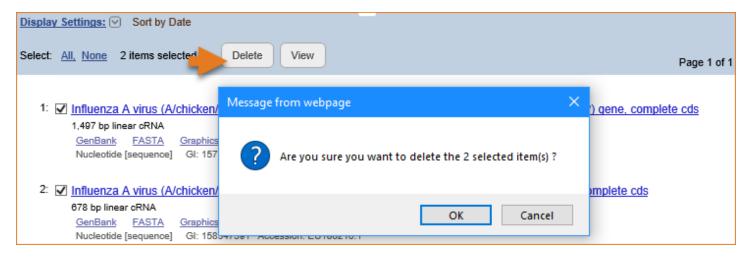


To delete items from a collection:

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1. Sign in to My NCBI and go to Collections. Click the "Edit" link next to the Collection Name you wish to modify.

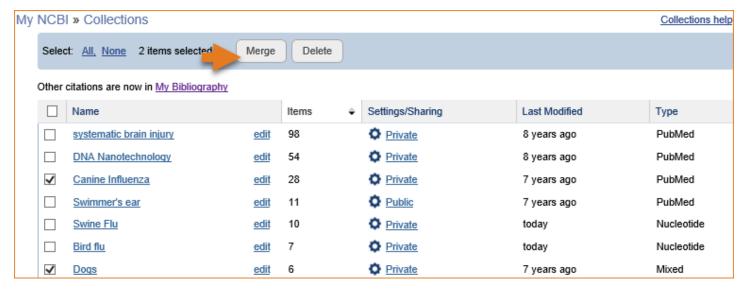
2. Click the checkbox next to items you wish to delete and click the Delete button. A pop-up message will ask you to confirm your action.



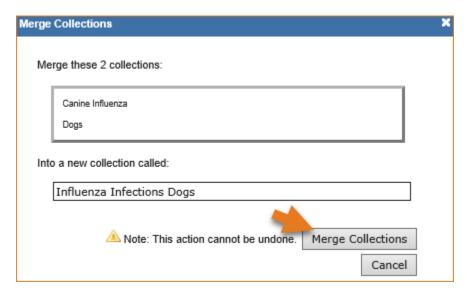
Merging Collections

In the Collections portlet, click the link "Manage Collections."

1 Select the collections you wish to merge into a new collection and click "Merge."



2. A confirmation message notifies you of the collections to be merged and requires you to provide a name for the merged collection. Click "Merge Collections."

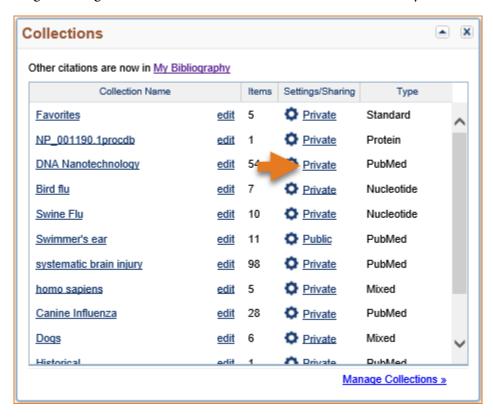


3. Back to Collections, you will notice that only the merged collection is listed.

Sharing Collections

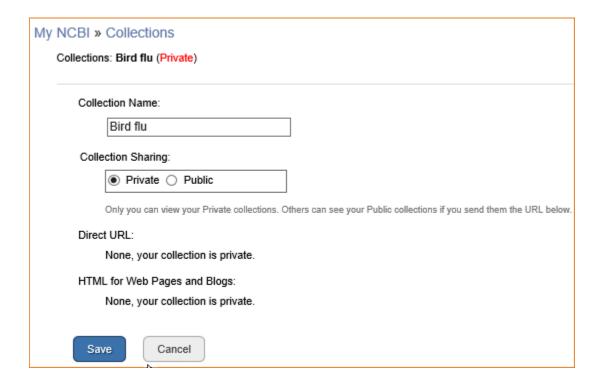
My NCBI collections are set as Private by default. However, a collection can be set as Public to be shared with others. To change a collection from Private to Public:

- 1. Sign In to My NCBI and go to Collections.
- 2. Under the "Settings/Sharing" column, click the Private link for the collection you wish to share.



3. Click the radio button for Public. A URL and HTML code will be provided. You can use the URL to share with others and the HTML code to post onto a web page. Click Save.

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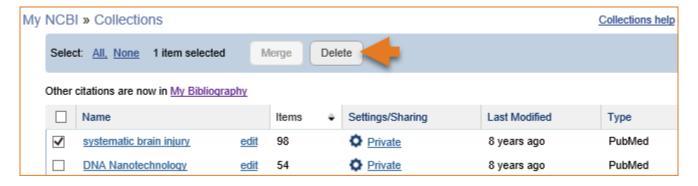
Note:

- Any time someone uses the public collection URL/HTML to see a collection; the retrieval will include all
 the items currently included in the collection. Adding or deleting items in the collection does not require
 an update to the public URL or HTML
- If a collection is changed back to Private, the collection URL/HTML will no longer work

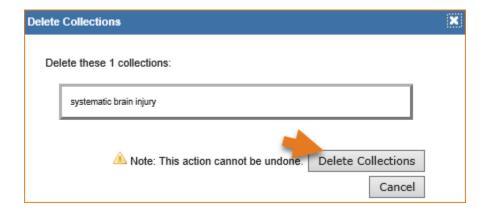
Deleting Collections

To delete a collection, start by clicking the "Manage Collections" link. To delete specific items within a collection, see "Editing Collections."

1 Use the check boxes to select collections to delete and then click Delete.



2. A pop-up message will confirm the collections to be deleted. Click "Delete Collections." Once a collection is deleted, this action cannot be undone.



My Bibliography

Created: December 13, 2010; Revised: July 26, 2023.

My Bibliography is a reference tool that helps you save your citations from PubMed or, if not found there, to manually upload a citations file, or to enter citation information using My Bibliography templates. My Bibliography provides a centralized place for your publications where citations are easily accessed, exported as a file, and made public to share with others.

When linked to an eRA account, My Bibliography includes more features which allow eRA Commons users to see whether their publications comply with the NIH Public Access Policy, to start the compliance process for their publications, and to associate their publications to awards. In addition, HRA grantees can associate their publications to their HRA awards in My Bibliography.

NCBI started the transition to use only federated account credentials for NCBI account login on June 1st, 2021. The deadline for transitioning all NCBI accounts to 3rd-party only login is June 2022. Please read the below FAQs and write to info@ncbi.nlm.nih.gov if you have any questions.

https://ncbiinsights.ncbi.nlm.nih.gov/ncbi-login-retirement-faqs

Section Contents

- Creating a Bibliography
- Viewing Citations and Making Citations Private
- Downloading Citations and Copying Citations to Collections
- Sorting, Filtering, and Searching Citations
- Deleting Citations
- Managing Compliance with the NIH Public Access Policy
- Sharing My Bibliography
- Adding Delegates in My Bibliography
- Confirming a My Bibliography Connection for Delegates

Creating a Bibliography

There are four options to populate a My Bibliography collection with author-specific citations: directly from PubMed, using a search tool in My Bibliography to add PubMed citations, uploading citations from a file, or using a template for publications not found in PubMed. Citations to articles published by other authors can be stored in a My NCBI collection.

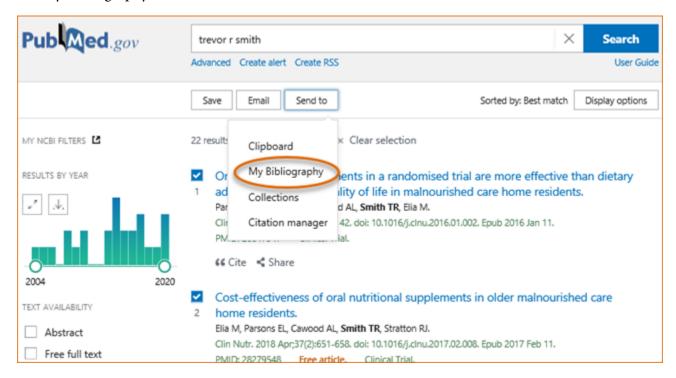
- Adding Citations directly from PubMed
- Adding PubMed Citations in My Bibliography
- Adding Citations from a File
- Adding Citations Manually

Adding Citations Directly from PubMed

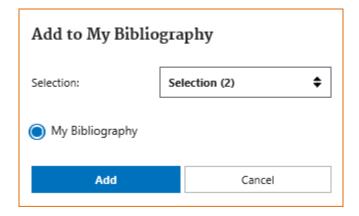
1. Sign in to My NCBI.

- 2. Run an author search.
- 3. Select the citations you want to add to My Bibliography, and then click the "Send to" button to expand the drop-down menu

4. Select "My Bibliography"



5. In the "Add to My Bibliography" page, click Add to save the selected citations to your My Bibliography collection.

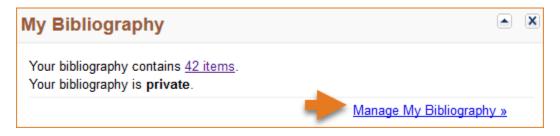


Adding PubMed Citations in My Bibliography

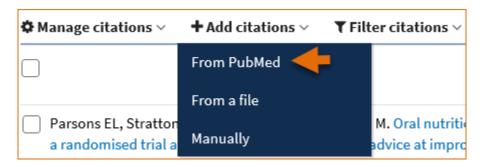
Use the My Bibliography search tool to add PubMed citations:

1. Sign in to My NCBI and go to My Bibliography. Click "Manage My Bibliography."

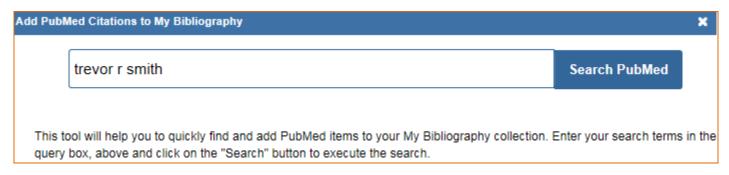
My Bibliography 27



2. Click on '+Add citations' and select 'From PubMed.'



3. Enter an author full name, or last name and initials in the search box, and click "Search PubMed."



4. Select the citations you wish to add to your My Bibliography collection and click "Add to My Bibliography." Close the window and the newly added citations will immediately display in My Bibliography.

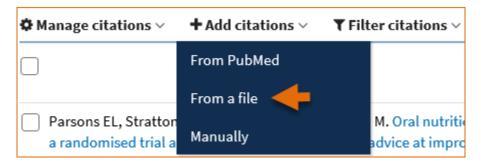
Add F	bubMed Citations to My Bibliography	×
	trevor r smith Search PubMed	^
	Search Results 21 items	
~	DMAb inoculation of synthetic cross reactive antibodies protects against lethal influenza A and B infections. Elliott STC, et al. NPJ Vaccines. 2017	
~	An engineered bispecific DNA-encoded IgG antibody protects against Pseudomonas aeruginosa in a pneumonia challenge model. Patel A, et al. Nat Commun. 2017	
	Nucleic acid-based vaccines targeting respiratory syncytial virus: Delivering the goods. Smith TRF, et al. Hum Vaccin Immunother. 2017	
	Development of an intradermal DNA vaccine delivery strategy to achieve single-dose immunity against respiratory syncytial virus. Smith TRF, et al. Vaccine. 2017	ı
	Cost-effectiveness of oral nutritional supplements in older malnourished care home residents. Elia M, et al. Clin Nutr. 2018	
	Characterization of guinea pig T cell responses elicited after EP-assisted delivery of DNA vaccines to the skin. Schultheis K, et al. Vaccine. 2017	,
2 ite	em(s) selected Add To My Bibliography	

My Bibliography 29

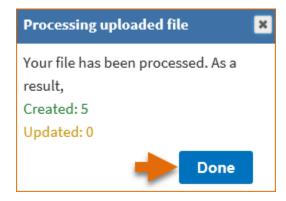
Adding Citations from a File

Use a file that has your article citations in either the MEDLINE or RIS format to add citations to your My Bibliography collection.

- 1 Sign in to My NCBI and go to My Bibliography. Click "Manage My Bibliography."
- 1. Click on '+Add citations' and select 'From a file.'



2 Upload a file with citations in either MEDLINE or RIS format. A confirmation message indicates the number of citations added to your My Bibliography collection.

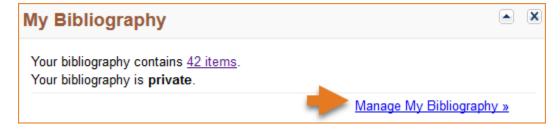


3 In the cases where a file has citations in a format other than MEDLINE or RIS, a message will indicate that the format is not supported.

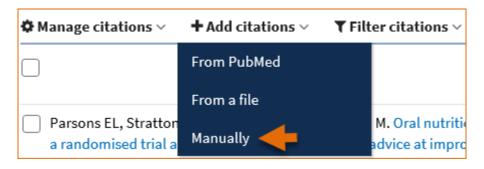
Adding Citations Manually

Use My Bibliography templates to create citations for publications not found in PubMed:

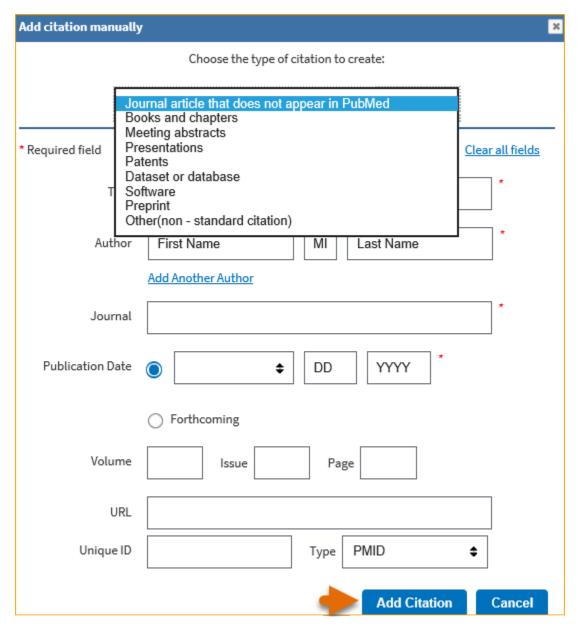
1. Sign in to My NCBI and go to My Bibliography. Click "Manage My Bibliography."



2 Click on '+Add citations' and select 'Manually.'



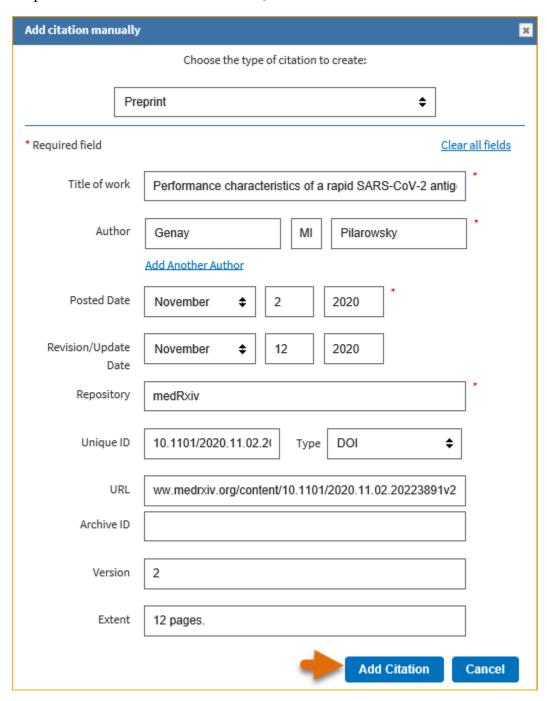
3. Select the type of publication to be entered manually: journal articles, books/chapters, meeting abstracts, presentations, patents, dataset/database, software, preprint articles and non-standard citations. Enter the publication information in the fields provided. All required fields are denoted with a red asterisk.



My Bibliography has multiple templates with fields pertinent to each type of publication (see list in the image above). For example, to enter information for preprint articles:

1 Click on '+Add citations' and select 'Manually.'

- 1. Select the option "Preprint." All required fields are denoted with a red asterisk.
- 2. Enter the research manuscript title and author(s) name(s).
- 3. Enter the manuscript posted date. Enter revision date (if available).
- 4. Enter the preprint server or repository name where the manuscript is stored.
- 5. Enter the work assigned DOI. Note that NIH preference is to include DOI information. For further information on requirements, see the NIH Grants FAQ for Interim Research Products.

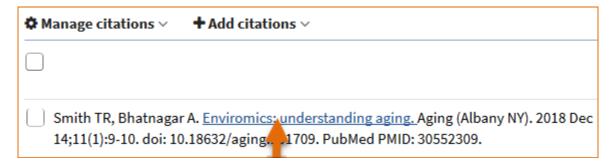


Viewing Citations and Making Citations Private

Sign in to My NCBI. To view all citations available in your bibliography, click "Manage My Bibliography" or the items number link.

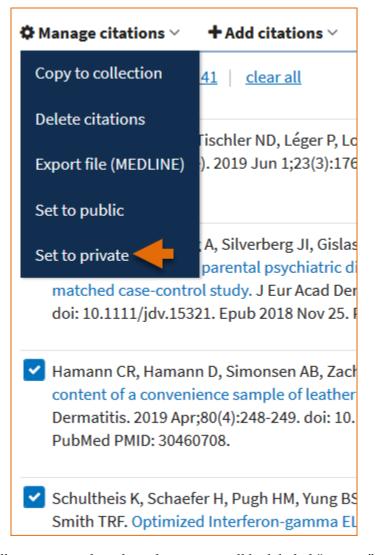


My Bibliography displays citations that are included in PubMed, not published in PubMed and uploaded using a file, or created manually using My Bibliography templates. **Citations included in PubMed have hyperlinked article titles**. Click on each article title to view all information related to a citation that is found in the corresponding PubMed record.

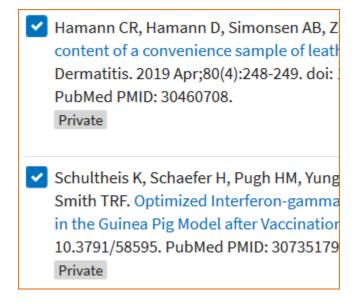


When a My Bibliography collection is set as public to share with others, a URL is provided to a public view of your bibliography. The public view page displays all the citations stored in your My Bibliography collection. Using the **Set to private** option in Manage citations you can select citations to label as private which will not be displayed in My Bibliography's public view page.

To **label citations as private**, select the citations to omit from your bibliography public view page and click the option **Set to private** under Manage citations.



In your My Bibliography collection page the selected citations will be labeled "private," as shown below. These citations will not display in your bibliography public page.



Note:

• When adding citations manually to My Bibliography, there will be no hyperlink for the citation title unless the citation exists in PubMed. Manually entered citations display a pencil icon Manually-entered which allows for further editing at any time

Downloading Citations and Copying Citations to Collections

Citations stored in My Bibliography can be downloaded in MEDLINE (text) format by checking the boxes next to the citations that you wish to include in an export file and selecting the option "Export file (MEDLINE)" in Manage citations.



Manage citations. also includes an option to copy citations to a new collection, or to an existing collection, by checking the boxes next to the citations to be copied and selecting the option "Copy to collection." This option can be used to copy citations labeled "Other Citations" to an existing collection or a new collection. The Other Citations collection is no longer supported in My Bibliography 3.0 and these citations do not display in users' My Bibliography public page.

Note:

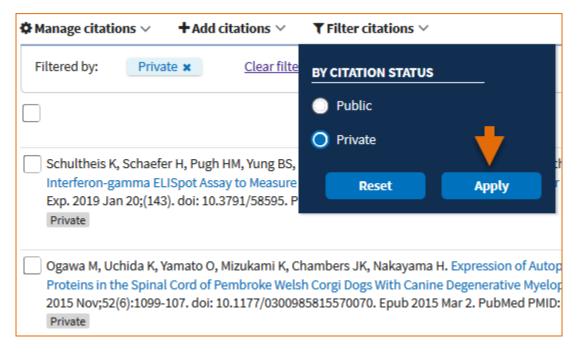
 The Manage citations feature includes two options for eRA Commons users: Manage awards and Compliance report PDF. These options are explained in detail in Managing Compliance with the NIH Public Access Policy

Sorting, Filtering, and Searching Citations

In My Bibliography citations can be sorted by author name (either in ascending or descending order), by publication date (newest to oldest or oldest to newest), or by recently updated citations.



Use **filter citations** to limit results by citation status either public or private. Citations labeled "private" do not display in your My Bibliography public view page.



Locating citations in My Bibliography can be accomplished with ease by entering in the search box: article PMCID, citation PMID, article title words, author name, DOI, or journal title.



Note:

• The default setting for the Sort option is to group citations by newest to oldest. Citations are sorted by the date an article was published and not the Entrez date

- When sorting by author name, citations are sorted by the first listed authors in alphabetical order
- Meeting abstracts have two different dates: conference date and publication date. The publication date will be used to determine the sort date
- When a publication has both a print date and an Epub date, the print date will be used to sort citations

Deleting Citations

To delete citations, use the check boxes to select citations to delete, and in the Manage citations drop-down menu select "Delete citations." A pop-up message will ask to confirm your action.



Note:

• Deleted citations can only be re-stated by loading citations from PubMed, uploading citations from a file, or entering citations manually using My Bibliography templates.

Managing Compliance to the NIH Public Access Policy

In My Bibliography eRA Commons users, who have awarded grants in their portfolio, are able to see whether their publications are compliant with the NIH Public Access Policy, to start the compliance process, and to associate their publications to NIH extramural awards.

- Checking your Publications Compliance Status
- Initiating the Compliance Process
- Associating Funding to your Publications
- Filtering your Publications by Awards and by Citation Status
- Viewing New Citations Linked to your Awards

• Creating a Compliance Report PDF for your Bibliography

Checking your Publications Compliance Status

Select the "eRA Commons" signing option in the NCBI login page, log in using your eRA Commons credentials, and proceed to link your eRA account to an existing NCBI account, or register for a new NCBI account.

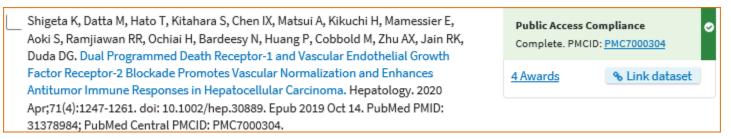
In the NCBI homepage go to the **My Bibliography** widget and click "Manage My Bibliography." The icon werifies that an eRA account has been linked to an NCBI account.

In the My Bibliography banner, check the **citation compliance status bar** for immediate feedback on the number of your publications that are non-compliant, not defined, in process, or complete. In the example below, Theodore Smith has two articles which are non-compliant, 29 not defined, two in process, and 190 articles compliant to the NIH Public Access Policy.

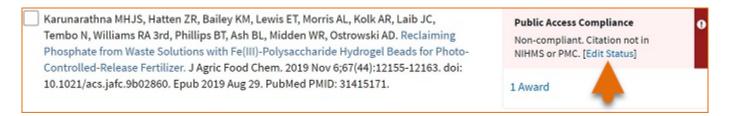


The **publication compliance status bar** has filtering functionality as well. It can help you quickly find the article citations associated to each compliance group. For example, clicking on the second icon in the status bar would result in My Bibliography displaying only the two non-compliant citations found in Theodore's bibliography.

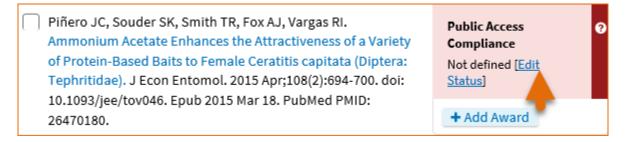
The **color coding** in the publication compliance status bar corresponds to the color coding in the article citations list. Article citations that are compliant with the NIH Public Access Policy have the Public Access Compliance information color coded in **green** and they have a PubMed Central article ID (PMCID) associated with the article citation. In the example below, four awards are found to be associated to the article. Additionally, users have the option to enter link information for their research datasets by clicking the **Link dataset** button and entering dataset identifiers such as repository ID, for example Dryad ID, or dataset DOI. Dataset links are included in PMC in the corresponding article full text page.



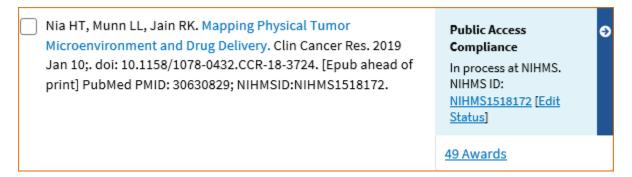
Citations that have the Public Access Compliance information color coded in **red** are either non-compliant or not defined. Non-compliant article citations have awards associated to them, but the research article manuscripts have not been submitted to the NIH Manuscript Submission (NIHMS) system. Non-compliant article citations do not display a PMCID. The compliance process can be started by clicking "Edit Status."



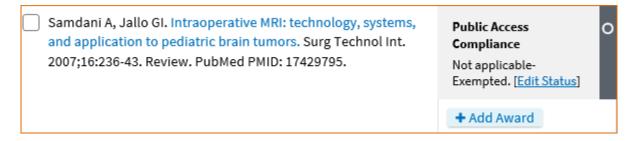
Not defined citations do not have awards associated to them and they do not display a PMCID. Citations that are not defined need to be identified as publications supported by NIH grants; click "Edit Status" to confirm that an article was partly or wholly supported by NIH grants. NIH funding information can be added to not defined citations by clicking the "Add award" button.



Publications or products newly submitted to the NIHMS are considered in process and display the Public Access Compliance information color coded in **blue**. Note that the citation below has been assigned an NIHMS article ID number.



Publications or products that are not funded by NIH grants, or were accepted for publication prior to April 7, 2008 (not covered by the NIH Public Access Policy), are marked as "Not Applicable-Exempted."



The **Sort by** filter has an option to help you organize your citations by **Public Access Compliance**.



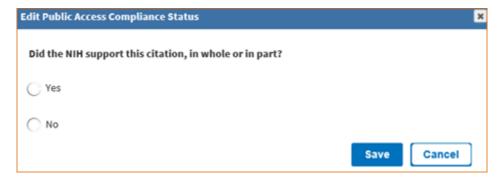
When selecting to **sort** article citations by **public access compliance**, the group of not defined citations will move to the top, followed by non-compliant citations, compliance in process, compliance complete, and last, not applicable-exempted article citations.

Initiating Public Access Compliance

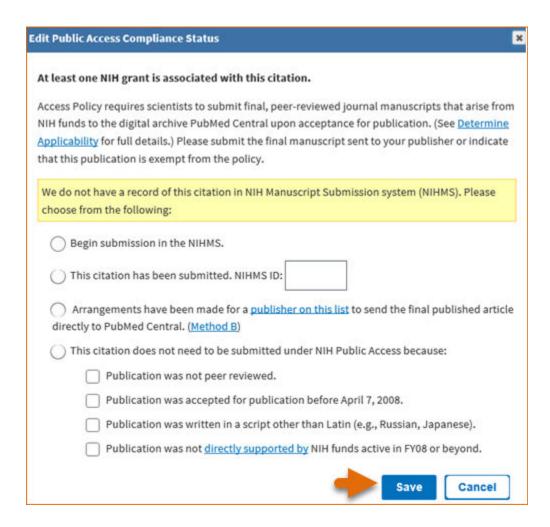
Initiate the compliance process in My Bibliography, for not defined or non-compliant citations, by clicking "Edit Status" to activate the pop-up wizard.



Citations that are not defined (citations that do not have grant associations) need to be identified as publications of research activities supported by NIH grants.



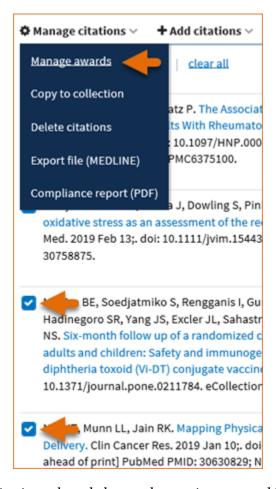
Citations that are non-compliant (citations that have NIH grant associations) will be directed to a compliance status pop-up form where you will be able to begin an article submission to the NIH Manuscript Submission program (NIHMS), provide the NIHMS ID for your publication to change article compliance status to in process, confirm that other arrangements have been made with journal publishers or PubMed Central, or determine if your articles are exempt from the NIH Public Access policy.



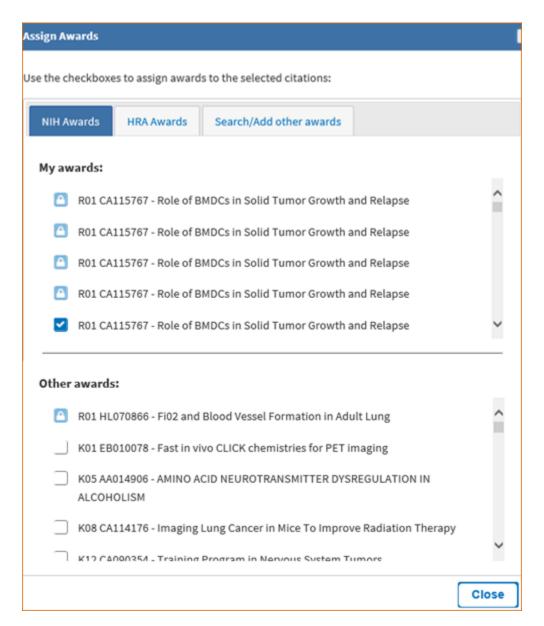
Associating Funding to your Publications

Assign Awards is a My Bibliography feature that is used to associate NIH or HRA (Health Research Alliance) awards to article citations and to search for awards using a grant number, award title, or grantee name. To associate multiple article citations with awards at once, select the citations you wish to associate to awards, click

Manage citations and select "Manage awards."

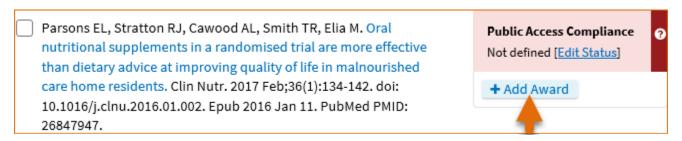


Select the appropriate funding institution tab and choose the pertinent award ID(s) from the award list presented to you in either "My awards" or "Other awards." Your selections will be saved automatically. To remove awards from your citations, uncheck the checkbox next to an award. Your citations will be updated immediately.

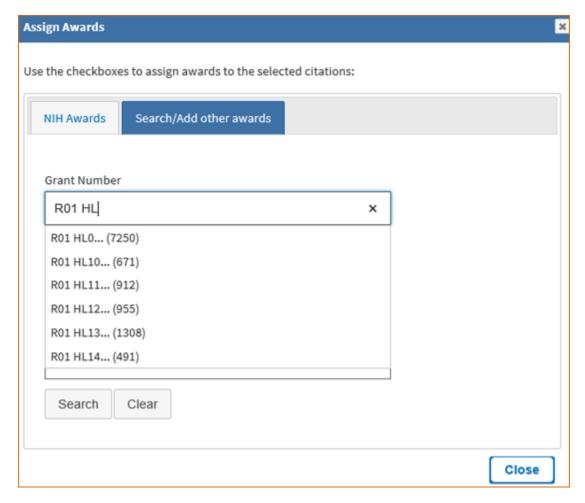


The "My awards" section displays a list of awards associated with your personal profile. The "Other awards" section displays awards that are not associated directly with your personal profile but have been linked to citations found in your My Bibliography collection. In some cases, it is not possible to deselect awards in the Assign Awards tool. For example, if a grant association was created in the NIHMS system or if a grant was linked to one of your citations by the grant owner, in both cases the award checkboxes will be locked, shown by a padlock icon . Mouse over the padlock icon to check whether to contact the NIH Public Access office or the NIHMS help desk for assistance in removing locked award associations for your citations.

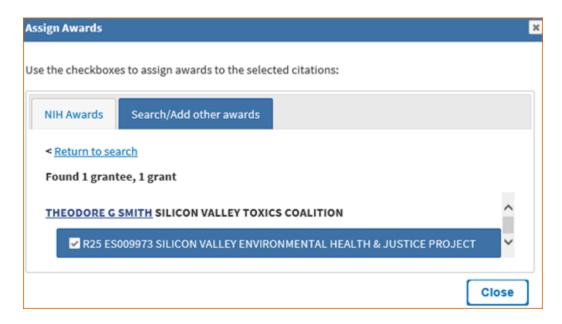
It is also possible to associate individual citations to awards by clicking the +Add Award button and selecting the pertinent award ID(s) in "My awards" or "Other awards" lists. Your selections will be saved automatically.



In the "Search/Add other awards" tab, you can search for awards using a grant number, award title, or grantee name. The search box includes an auto-complete feature, which provides a list of possible grant number or grantee name matches.

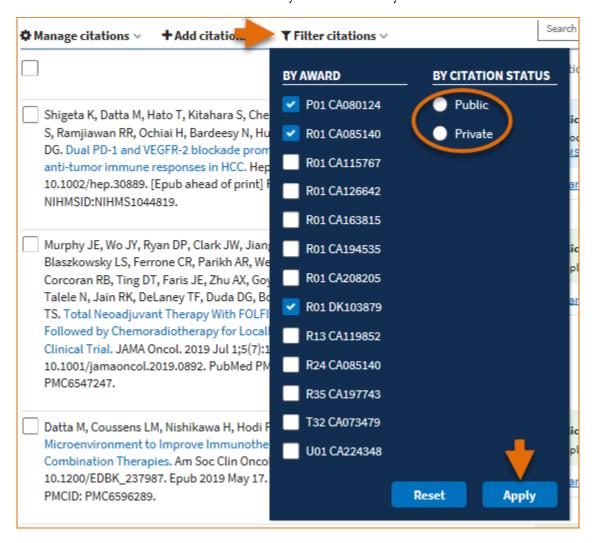


A list of grantee names affiliated with the selected grant number will be provided. Check the award(s) you wish to associate to a citation in your bibliography and the selected award(s) will be automatically saved in the "Other Awards" section. Afterwards you will be able to associate the newly selected awards to other citations in your bibliography.



Filtering your Publications by Awards and by Citation Status

Filter citations is a feature of My Bibliography that helps you limit citation results by awards associated to your publications. Filter citations lists all the grants associated with your citations that are stored in My Bibliography. Click "Filter citations" and select one or more awards by which to limit your citation results.

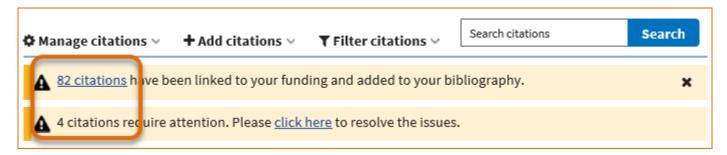


Use **filter citations** to limit results by citation status either public or private. Citations labeled "private" do not display in your My Bibliography public view page. See, Making Citations Private.

Viewing New Citations Linked to your Awards

My Bibliography will notify award owners when citations have been associated to their awards and added to their My Bibliography collection. Once a citation is associated to a grant in My Bibliography or the association is made via the NIH Manuscript Submission system, the article-grant association will be included in the corresponding PubMed citation, and it will be linked to the grant in the NIH research activities database as well.

My Bibliography will automatically add PubMed citations to your bibliography based on new associations made to grants awarded to you. A message will be displayed, which will provide a link to review the newly linked citations. In the image below, 82 article citation-award associations were found. The alert message will remain until it is dismissed by clicking the X on the right.



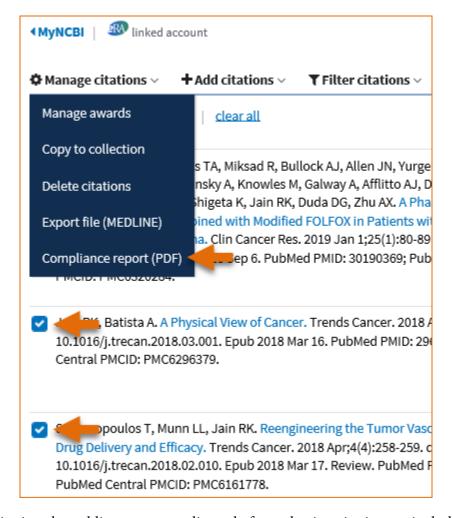
For citations created manually, My Bibliography will look for citations newly added to PubMed and it will alert you to the matches it found. In the image above, the second alert lists 4 citation matches found. A link is provided to view the citation matches and to either confirm or reject them. In the cases where manually created citations differ significantly from the article citation provided by the journal publisher to PubMed, it is possible that a match would not be found. In those cases, delete the manually created citations and use "+Add citations" to add citations directly from PubMed.

Note:

- Grant owners can remove article-grant associations made by other users.
- In the case of citations created manually in My Bibliography, only grant owners can associate their grants to these citations.

Creating an Award Compliance Report PDF for your Bibliography

Citations stored in My Bibliography can be selected and compiled into a report in PDF format. Select the citations you wish to include in your report and choose the option "Compliance report (PDF)" in "Manage citations.



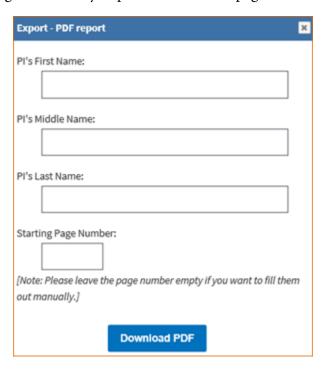
It is possible to sort citations by public access compliance before selecting citations to include a compliance report, select the option "Public Access Compliance" in the Sort by drop-down list.



To select all citations included in your My Bibliography collection, check the box immediately below *Manage citations and click the "Select all xxxx" link.



In the Export - PDF report pop-up, enter the First, Middle, and Last name to appear in the report and a starting page number. Do not enter a page number if you prefer to enter the page numbers directly on the report pages.



The resulting PDF will have the information entered in the First, Middle and Last Name fields on the upper right corner of all the pages included in the report. The compliance status will be shown in the first column and the corresponding citations will be listed in the second column. Pagination will be displayed at the bottom of the page.

Sharing My Bibliography

Citations stored in My Bibliography can be shared with others using the personal public URL found in your My Bibliography collection. The My Bibliography public page displays all the citations currently stored in your My Bibliography collection that are not labeled as private (see Making Citations Private). Citations in this public page can be sorted by recently updated, newest to oldest, oldest to newest, author name in descending or ascending order.



Note:

• Any time someone uses the My Bibliography public URL to see a My Bibliography collection; retrieval will include all the citations currently stored in My Bibliography except for citations labeled "Other citations." The **Other Citations** collection is no longer supported in My Bibliography 3.0 and these citations do not display in users My Bibliography public page.

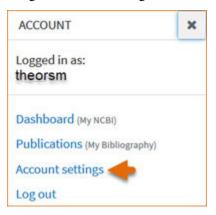
• Adding or deleting citations does not require an update to the My Bibliography public URL.

Adding Delegates in My Bibliography

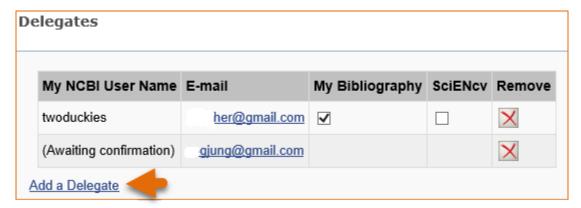
My Bibliography users can grant access to other persons (delegates) to view and manage their My Bibliography collection. The delegates will then be able to add or to remove citations in a collection and they will be able to associate citations to grants as well. Delegate invitations are initiated by NCBI account owners.

The option to **add a delegate** is available in the My NCBI account settings page. To add a delegate to manage your My Bibliography collection:

1. Log in to your NCBI account and click on your username (top right corner of page) to access the Account Settings page. The Account Settings page can also be accessed in My Bibliography by clicking on your username (top right corner) and selecting "Account Settings."



Go to the "Delegates" section and click "Add a Delegate."



- 3. Enter the delegate's e-mail address and click OK.
- 4. Your delegate will receive an e-mail with a URL that leads to an access confirmation page. After a delegate confirms the connection to your account, access to the account will be enabled.

Note:

• The Delegates section of the Account Settings page displays a list of all the delegates granted access to your My Bibliography collection.

• In the Delegates section you may add or remove delegates as well as **modify the access** granted.

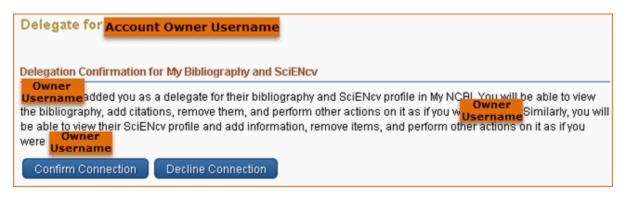
Confirming a My Bibliography Connection for Delegates

Delegates are persons who are granted access by My Bibliography collection owners to view and manage their bibliographies. Delegates can add and remove citations in My Bibliography and check whether a publication is compliant with the NIH Public Access policy.

Delegate invitations are initiated by My Bibliography collection owners. The collection owners log in to their My NCBI accounts and select to add a delegate. A confirmation e-mail will be sent to the delegate(s) added to the NCBI account.

To confirm the connection:

- 1 Delegates must sign into their personal NCBI account **before** replying to the confirmation e-mail. To register for a NCBI account, go to https://www.ncbi.nlm.nih.gov/account/
- 1 Respond to the confirmation e-mail from NCBI by clicking on the URL provided.
- 1 Click on the "Confirm Connection" button. Under Collections you should see a link for the bibliography for which you are a delegate along with a link to your personal bibliography. Note that these are separate bibliographies.



Created: August 12, 2013; Updated: May 21, 2024.

SciENcv is an application in My NCBI that helps you create and manage documents in support of grant applications with participating agencies. In SciENcv you can document your education, employment, research activities, publications, honors, research grants, and other professional contributions. My NCBI users can create multiple SciENcv profiles in official biographical sketch formats, for the National Institutes of Health (NIH), the National Science Foundation (NSF), and the Institute of Education Sciences (IES), which can be used for grant submissions. In addition, the SciENcv application can be used to create the official NSF Current and Pending (Other) Support document.

NIH eRA Commons, NSF, and ORCID account holders who have linked their accounts to NCBI can populate their SciENcv profiles with the information stored in their eRA, NSF, or ORCID accounts. The information transferred to SciENcv can be changed, hidden, augmented, or deleted. SciENcv users control the content displayed in their SciENcv profiles.

NCBI started the transition to use only federated account credentials for NCBI account login on June 1st, 2021. The deadline for transitioning all NCBI accounts to 3rd-party only login was June 2022. Please read the below FAQs and write to info@ncbi.nlm.nih.gov if you have any questions.

https://ncbiinsights.ncbi.nlm.nih.gov/ncbi-login-retirement-faqs

Section Contents

- Accessing SciENcv
- Creating SciENcv Documents
- Using the NIH Biographical Sketch
- Using the NIH Fellowship Sketch
- Using the NSF Biographical Sketch
- Using the NSF Current & Pending (Other) Support
- Using the IES Biographical Sketch
- Editing and Deleting SciENcv Biosketches
- Sharing SciENcv
- Downloading SciENcv
- Adding Delegates to SciENcv

Accessing SciENcv

After signing in to NCBI, SciENcv can be accessed from the SciENcv portlet which is located in the My NCBI main page, or from about SciENcv.

The SciENcv portlet provides information at glance on all the existing SciENcv documents for a My NCBI account as well as their current sharing status. If no documents have been created, the SciENcv portlet provides a link to create a document.

Creating SciENcy Documents

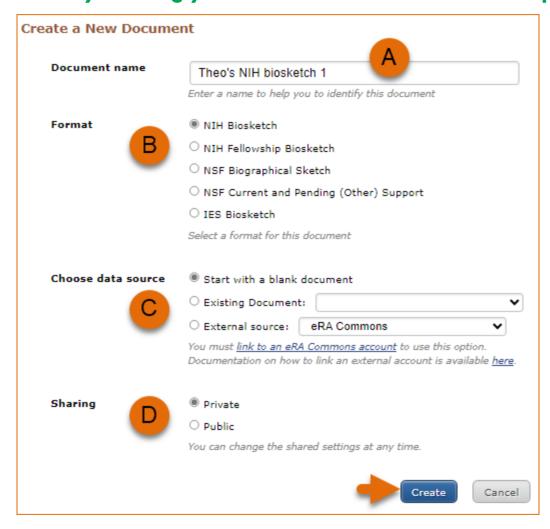
Sign in to NCBI. Go to the SciENCV portlet and click the hyperlink "Click here."



There are three ways to create a professional profile in SciENcv:

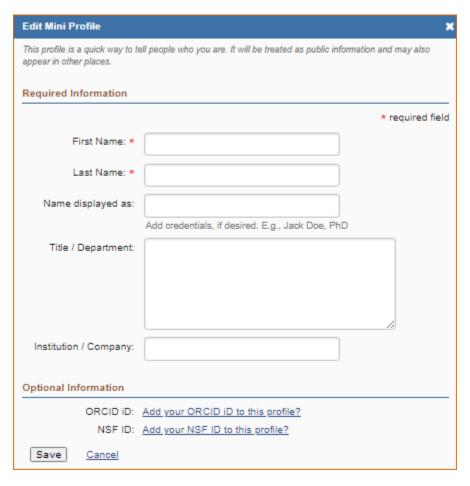
- Through manually entering your information into a SciENcv template
- Through making a duplicate of an existing document
- Through an automated data feed from an external source

Through manually entering your information into a SciENcv template



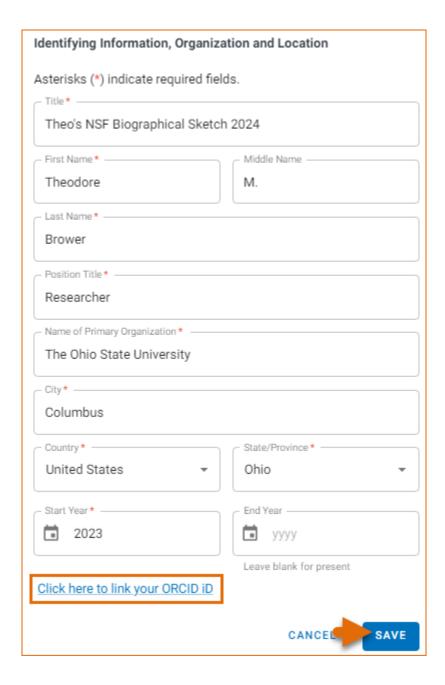
- 1. Enter a name for your new document (see A above).
- 2. Select a document format (**B**).
- 3. Select "Start with a blank document" (C).
- 4. Choose to make your NIH, NIH Fellowship, or IES biosketch public or private (**D**) and click **Create.** You may change the sharing status for this profile at any time.

To start the process, enter your information in the personal information window. If you have publications stored in My Bibliography, those will be automatically uploaded to your SciENcv biographical sketches.

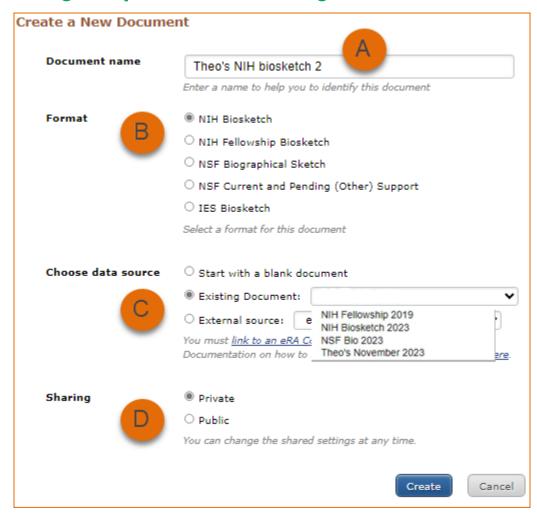


Under optional information (NIH biosketch documents), the link next to "eRA COMMONS ID" allows eRA users to link their SciENcv account to their eRA account. Once the accounts are linked, you will be able to populate SciENcv biosketches with your eRA information. Click "Add your ORCID iD to this profile?" to link to ORCID and add your ORCID iD to your SciENcv biosketch. At this point, your ORCID account will be linked to your NCBI account, and consequently, you will be able to use the biographical data in your ORCID record to populate SciENcv profiles (See Integrating with ORCID video).

National Science Foundation (NSF) biographical sketches include "Position Title" and "Name of Primary Organization" fields. A hyperlink to link your NSF biographical sketch to your ORCID iD is provided as well.

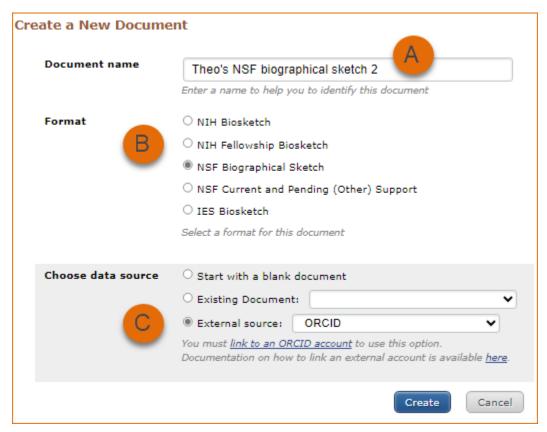


Through making a duplicate of an existing document



- 1. Enter a name for your new document (see A above).
- 2. Select a biosketch format (**B**).
- 3. Select a previously created profile from the "Existing Biosketch" drop-down menu(C).
- 4. Choose to make your NIH, NIH Fellowship, or IES biosketch public or private (**D**). You may change the sharing status for this profile at any time.
- 5. Click Create. SciENcv will generate a duplicate of the selected existing document.

Through an automated data feed from an external source



- 1. Enter a name for your new document (see **A** above).
- 2. Select a biosketch format (**B**).
- 3. Select a data provider from the External Source drop-down menu(**C**). Note that your SciENcv account has to be linked to the external data source account.
- 4. Click **Create**. SciENcv will automatically populate the new document with the information stored in your selected external data source.

Using the NIH Biographical Sketch

NIH eRA Commons, NSF, and ORCID iD account holders who have linked their accounts to NCBI can populate their SciENcv biosketches with the information stored in their eRA, NFS, or ORCID iD accounts. Information on linking accounts to NCBI can be found in Using a Partner Organization username and password.

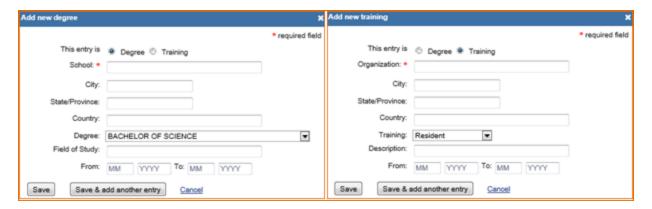
The NIH biographical sketch consists of the following sections:

- Education and Training
- Personal Statement
- Positions, Scientific Appointments, and Honors
- Contribution to Science

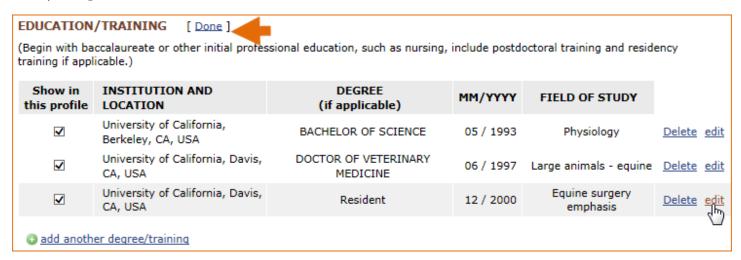
Education and Training

Under the section titled **Education/Training**, click the link "add one." Add your academic degree(s) and training, from oldest to most recently acquired.

1 Select a radio button for either an academic degree or a training entry. Each selection provides a different set of choices.



- 2. Click "Save." For multiple entries, click "Save & add another entry."
- 3. To edit or delete an entry, click "Edit entries" and click either "delete" or "edit" next to the selected degree or training entry. Once you have finished editing, adding, or deleting information, click "Done" to save your updates.



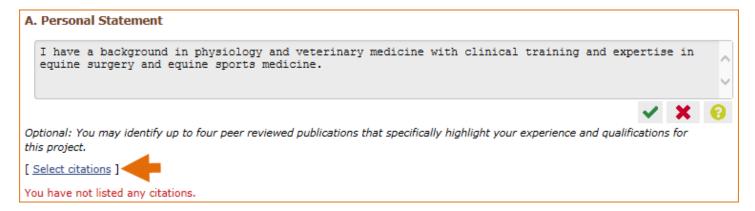
4 In SciENcv there is an option to hide entries. If you want to print or share your profile, but only want selective content to be displayed, uncheck the checkbox next to the entry you would like to hide and click "Done."

Personal Statement

In the **Personal Statement** section, enter a brief personal statement and up to four publications that highlight your work experience and qualifications. To start, click "Edit Statement."



Enter your personal statement and click ✓ to save your narrative. SciENcv uses markdown syntax which allows you to add simple formatting to your personal statement – for formatting help click the ② icon

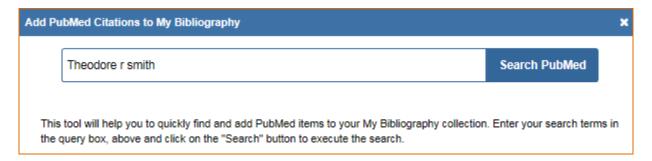


Citations stored in My Bibliography can be uploaded initially by clicking the link "Select citations." Select up to <u>four citations</u> to be displayed in this section.

In My Bibliography the default setting for the Sort by drop-down menu is to list citations by date (newest to oldest). Citations can also be sorted by publication date, update date, author (first listed authors in alphabetical order), or title (alphabetically). An ORCiD option is available, which you can use to retrieve citations stored in your ORCiD record (**C**).



If you find that your My Bibliography collection is not up to date and new PubMed citations need to be added, click "Add citations" (see **B** above) and enter an author full name, or last name and initials in the search box.



Select the citations you wish to add from the list of retrieved citations and click "Add to My Bibliography." The newly added citations will immediately display in the My Bibliography tab. For publications that are not included in PubMed, use the options to add citations using a file, or to add citations manually using My Bibliography templates, click "Go to My Bibliography" (see C above).

Note:

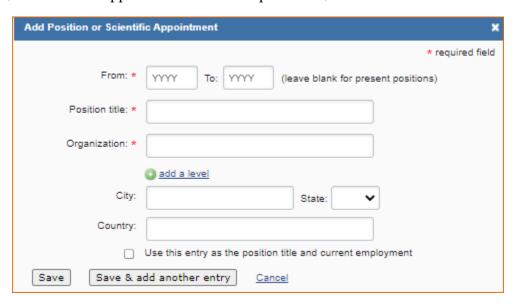
• If you linked your eRA Commons, NSF, or ORCID account to My NCBI, your SciENcv biosketches will have the biographical information available in those accounts.

- If you linked your ORCID account to My NCBI, your SciENcv biosketches will have the publications listed in your ORCID record under the ORCID tab.
- Citations under the 'My Bibliography' tab can only be deleted in My Bibliography. See Deleting Citations
- Citations under the 'ORCID' tab can only be deleted if they are deleted in your ORCID record

Positions, Scientific Appointments and Honors

The section titled **Positions**, **Scientific Appointments and Honors** consists of three parts: employment, scientific appointments, and honors. If you linked your eRA Commons, NSF, or ORCID account to My NCBI, the work experience section of SciENcv will be automatically populated for you.

1 Under the subtitle Position or Scientific Appointment, click "add one." Enter your past, present employment, and scientific appointments. For multiple entries, click "Save & add another entry."



2 Under the subtitle Honors, click "add one." Enter honor society memberships, honorary titles, and other honorary awards.



3 To edit or delete an entry, click "Edit entries" and click either "delete" or "edit" next to the selected position, scientific appointment or honor entry. Once you have finished editing, adding, or deleting information, click "Done" to save your updates.



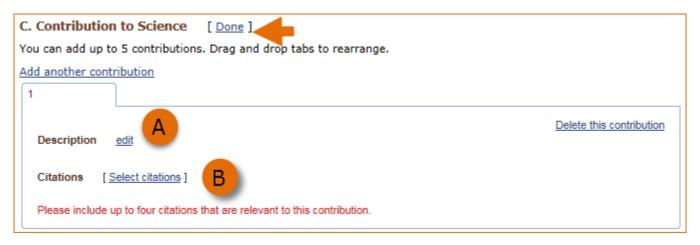
4 In SciENcv there is an option to hide entries. If you want to print or share your profile, but only want selective content to be displayed, uncheck the checkbox next to the entry you would like to hide and click "Done."

Contribution to Science

The **Contribution to Science** section aims to give researchers a place where they can describe five of their most significant contributions to science. Each contribution entry has two parts: a description and relevant references of up to four peer-reviewed publications.

To enter a description, click "edit" (A). According to NIH guidelines, each description should include: the historical background that frames the scientific problem; the central findings; the influence of the findings on the progress of science or the application of those findings to health or technology; and your specific role.

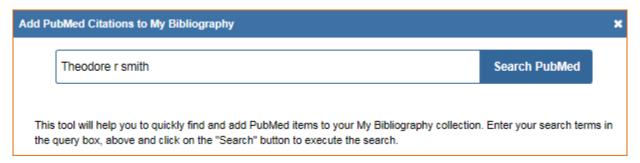
To add relevant citations from My Bibliography for each contribution, click "Select citations" (**B**). Select up to <u>four citations</u> to be displayed.



The default setting for the Sort by drop-down menu is to list citations by date (newest to oldest). Citations can also be sorted by publication date, update date, author (first listed authors in alphabetical order), or title (alphabetically). An ORCiD option is available, which you can use to retrieve citations stored in your ORCiD record (C).



If you find that your My Bibliography collection is not up to date and new PubMed citations need to be added, click "Add citations" (see **D** above) and enter an author full name, or last name and initials in the search box.



Select the citations you wish to add from the list of retrieved citations and click "Add to My Bibliography." The newly added citations will immediately display in the My Bibliography tab. For publications that are not included in PubMed, use the options to add citations using a file, or to add citations manually using My Bibliography templates, click "Go to My Bibliography" (see E above).

You can create up to five tabs by clicking "Add another contribution" (**F**), and the display order can be changed by dragging and dropping each tab. Contribution tabs can be removed by clicking "Delete this contribution." To save edits, click "Done."



There is also an option to include a URL to your My Bibliography collection of published research (**G**). Selecting this option would make your My Bibliography collection public.

Note:

- This section uses My Bibliography to manage citation data in SciENcv. Therefore, if you have publications stored in My Bibliography, those will be automatically uploaded to your SciENcv document.
- If you linked your ORCID iD account to My NCBI, your SciENcv profiles will have the publications listed in your ORCID iD record under the ORCID tab.
- Citations under the 'My Bibliography' tab can only be deleted in My Bibliography. See Deleting Citations
- Citations under the 'ORCID' tab can only be deleted if they are deleted in your ORCID iD record

Using the NIH Fellowship Biographical Sketch

NIH eRA Commons, NSF, and ORCID iD account holders who have linked their accounts to NCBI can populate their SciENcv biosketches with the information stored in their eRA, NSF, or ORCID iD accounts. Information on linking accounts to NCBI can be found in Using a Partner Organization username and password.

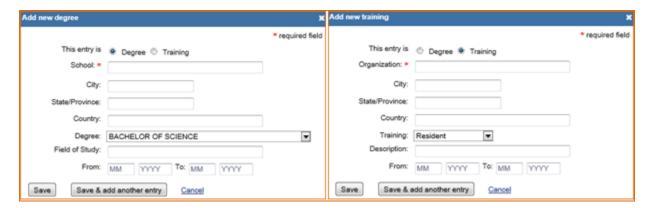
The NIH Fellowship biographical sketch consists of the following sections:

- Education and Training
- Personal Statement
- Positions, Scientific Appointments, and Honors
- Contribution to Science
- Scholastic Performance

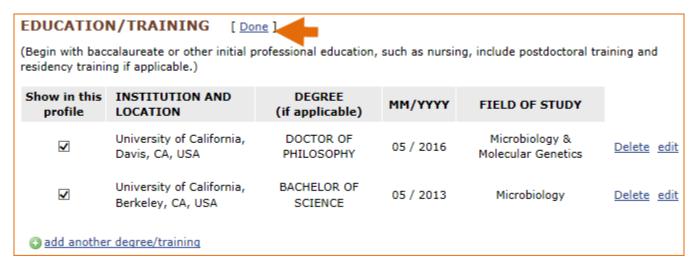
Education and Training

Under the section titled **Education/Training**, click the link "add one." Add your academic degree(s) and training, from oldest to most recently acquired.

1 Select a radio button for either an academic degree or a training entry. Each selection provides a different set of choices.



- 2. Click "Save." For multiple entries, click "Save & add another entry."
- 3. To edit or delete an entry, click "Edit entries" and click either "delete" or "edit" next to the selected degree or training entry. Once you have finished editing, adding, or deleting information, click "Done" to save your updates.



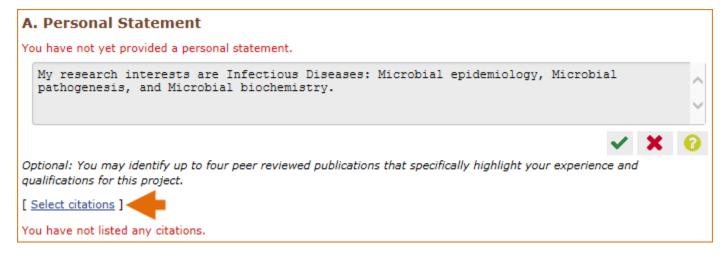
4 In SciENcv there is an option to hide entries. If you want to print or share your profile, but only want selective content to be displayed, uncheck the checkbox next to the entry you would like to hide and click "Done."

Personal Statement

In the **Personal Statement** section, enter a brief personal statement and up to four publications that highlight your work experience and qualifications. To start, click "Edit Statement."



Enter your personal statement and click ✓ to save your narrative. SciENcv uses markdown syntax which allows you to add simple formatting to your personal statement – for formatting help click the ② icon

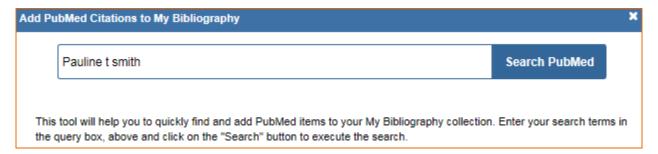


Citations stored in My Bibliography can be uploaded initially by clicking the link "Select citations." Select up to <u>four citations</u> to be displayed in this section.

In My Bibliography the default setting for the Sort by drop-down menu is to list citations by date (newest to oldest). Citations can also be sorted by publication date, update date, author (first listed authors in alphabetical order), or title (alphabetically). An ORCID option is available, which you can use to retrieve citations stored in your ORCID iD record (**C**).



If you find that your My Bibliography collection is not up to date and new PubMed citations need to be added, click "Add citations" (see **B** above) and enter an author full name, or last name and initials in the search box.



Select the citations you wish to add from the list of retrieved citations and click "Add to My Bibliography." The newly added citations will immediately display in the My Bibliography tab. For publications that are not included in PubMed, use the options to add citations using a file, or to add citations manually using My Bibliography templates, click "Go to My Bibliography" (see C above).

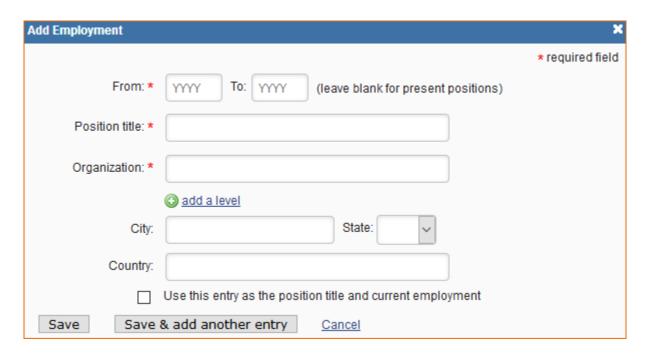
Note:

- If you linked your eRA Commons, NSF, or ORCID account to My NCBI, your SciENcv biosketches will have the biographical information available in those accounts.
- If you linked your ORCID iD account to My NCBI, your SciENcv biosketches will have the publications listed in your ORCID iD record under the ORCID tab.
- Citations under the 'My Bibliography' tab can only be deleted in My Bibliography. See Deleting Citations
- Citations under the 'ORCID' tab can only be deleted if they are deleted in your ORCID iD record

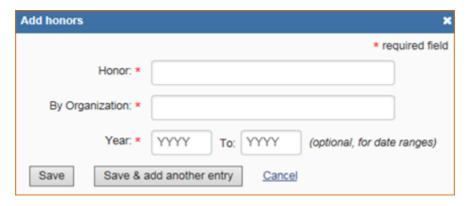
Positions, Scientific Appointments and Honors

The section titled **Positions**, **Scientific Appointments and Honors** consists of three parts: employment, scientific appointments, and honors. If you linked your eRA Commons, NSF, or ORCID account to My NCBI, the work experience section of SciENcv will be automatically populated for you.

1 Under the subtitle Position or Scientific Appointment, click "add one." Enter your past, present employment, and scientific appointments. For multiple entries, click "Save & add another entry."



2 Under the subtitle Honors, click "add one." Enter honor society memberships, honorary titles, and other honorary awards.



3 To edit or delete an entry, click "Edit entries" and click either "delete" or "edit" next to the selected position, scientific appointment, or honor entry. Once you have finished editing, adding, or deleting information, click "Done" to save your updates.



5 In SciENcv there is an option to hide entries. If you want to print or share your profile, but only want selective content to be displayed, uncheck the checkbox next to the entry you would like to hide and click "Done."

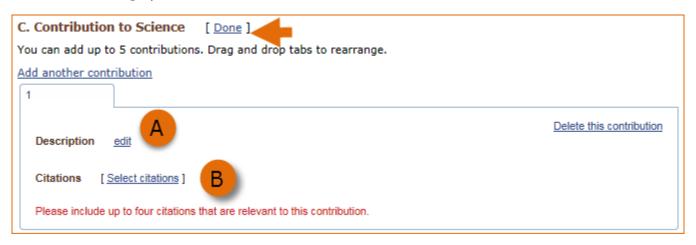
Contribution to Science

The Contribution to Science section aims to give researchers a place where they can describe five of their most significant contributions to science. While all applicants may describe up to five contributions, graduate students and post doctorates may wish to consider highlighting two or three they consider most significant.

Each contribution entry has two parts: a description and relevant references of up to four peer-reviewed publications.

To enter a description, click "edit" (A). According to NIH guidelines, each description should include: the historical background that frames the scientific problem; the central findings; the influence of the findings on the progress of science or the application of those findings to health or technology; and your specific role.

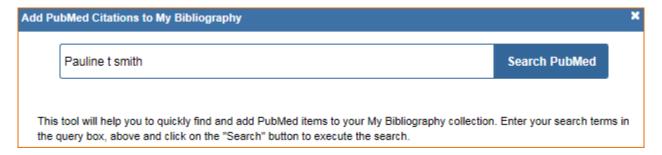
To add relevant citations from My Bibliography for each contribution, click "Select citations" (**B**). Select up to <u>four citations</u> to be displayed.



The default setting for the Sort by drop-down menu is to list citations by date (newest to oldest). Citations can also be sorted by publication date, update date, author (first listed authors in alphabetical order), or title (alphabetically). An ORCID iD option is available, which you can use to retrieve citations stored in your ORCID iD record (**C**).

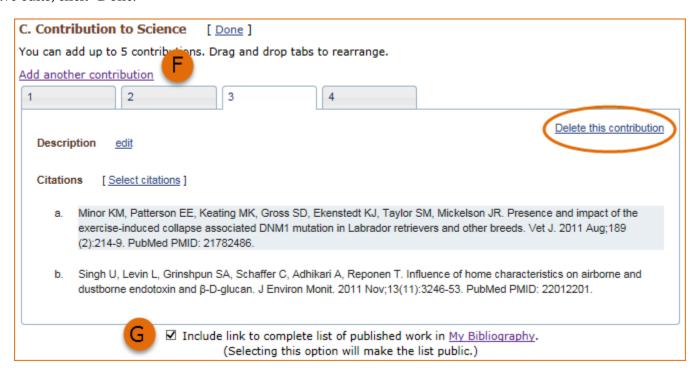


If you find that your My Bibliography collection is not up to date and new PubMed citations need to be added, click "Add citations" (see **D** above) and enter an author full name, or last name and initials in the search box.



Select the citations you wish to add from the list of retrieved citations and click "Add to My Bibliography." The newly added citations will immediately display in the My Bibliography tab. For publications that are not included in PubMed, use the options to add citations using a file, or to add citations manually using My Bibliography templates, click "Go to My Bibliography" (see E above).

You can create up to five tabs by clicking "Add another contribution" (F), and the display order can be changed by dragging and dropping each tab. Contribution tabs can be removed by clicking "Delete this contribution." To save edits, click "Done."



There is also an option to include a URL to your My Bibliography collection of published research (**G**). Selecting this option would make your My Bibliography collection public.

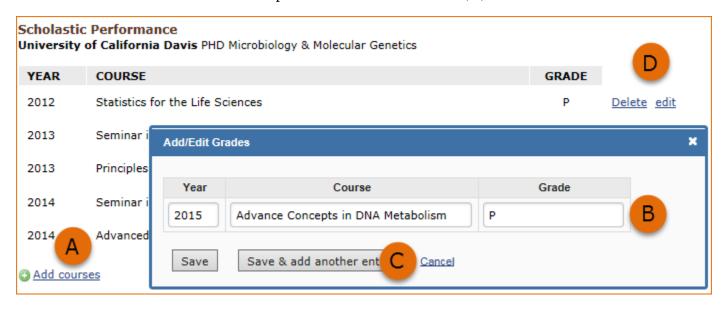
Note:

- This section uses My Bibliography to manage citation data in SciENcv. Therefore, if you have publications stored in My Bibliography, those will be automatically uploaded to your SciENcv profile.
- If you linked your ORCID iD account to My NCBI, your SciENcv profiles will have the publications listed in your ORCID iD record under the ORCID tab.
- Citations under the 'My Bibliography' tab can only be deleted in My Bibliography. See Deleting Citations
- Citations under the 'ORCID' tab can only be deleted if they are deleted in your ORCID iD record

Scholastic Performance

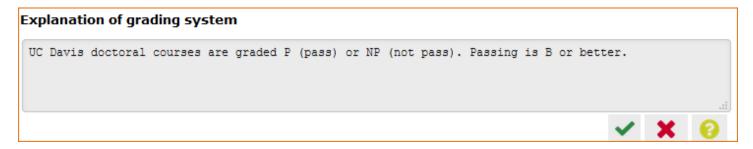
In the Scholastic Performance section, list all the undergraduate and graduate courses completed and the corresponding year and grade for each course. Postdoctoral applicants may also include professional courses relevant to the training sought at NIH. To add courses to your biosketch:

- 1. Click "Add courses" (A).
- 2. In the Add/Edit Grades window, enter the year, course title, and grade received (B).
- 3. For multiple entries, click "Save & add another entry" (C).
- 4. To delete or edit entries use the links provided next to each course (**D**)



Use the section "Explanation of Grading System" to explain an institution's grading system that differs from a scale (1-100 points, 0-4.0, or A, B, C, D, F).

- 1. Click "Edit Notes"
- 2. Enter a brief explanation regarding the levels required for a passing grade and click ✓ to save your narrative.



Using the NSF Biographical Sketch

The National Science Foundation (NSF) biographical sketch is an NSF approved format used for proposal submissions to the NSF. Complete details regarding the NSF biographical sketch requirements can be found in the NSF *Proposal and Award Policies and Procedures Guide* (PAPPG) Chapter II.D.2.h(i).

NSF, NIH eRA Commons, and ORCID ID account holders who have linked their accounts to My NCBI can populate their SciENcv biographical sketches with the information stored in their eRA, NSF, or ORCID iD accounts. Information on linking accounts to NCBI can be found in Using a Partner Organization Username and Password.

The NSF biographical sketch consists of five sections: Identifying Information, Organization and Location; Professional Preparation; Appointments and Positions; Products; Certification.

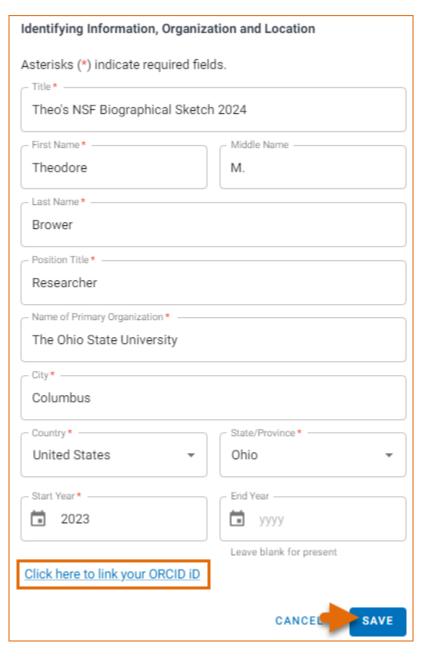
Use the links below to navigate to the SciENcv instructions for each section:

- 1. Identifying Information, Organization and Location
- 2. Professional Preparation
- 3. Appointments and Positions
- 4. Products
- 5. Certification

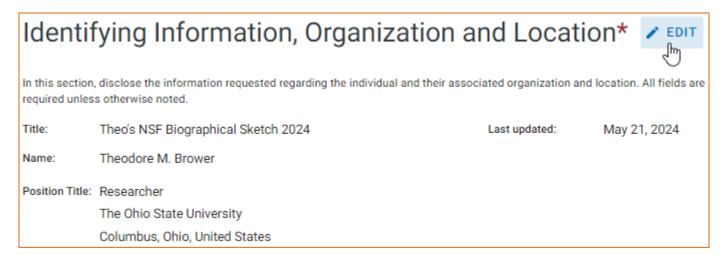
Identifying Information, Organization and Location

Under Identifying Information, Organization and Location, enter information as required by the Professional Preparation section in PAPPG Chapter II.D.2h(i)(a)(1).

1 Enter the required information for each section and click "Save."



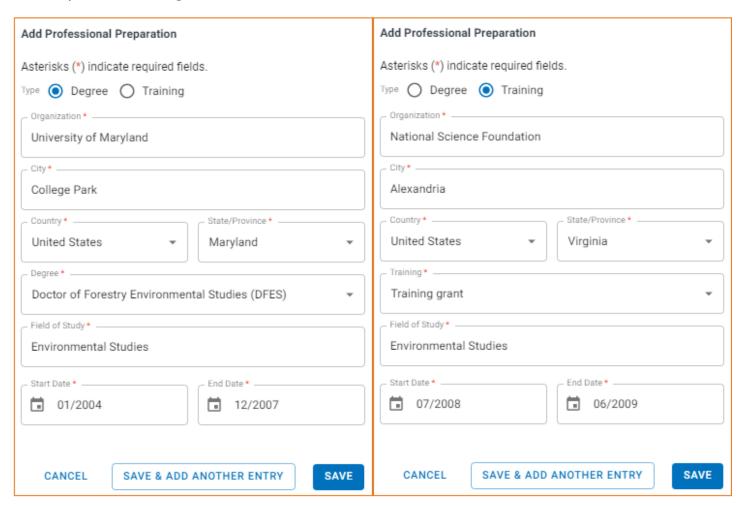
2 Click / to update the identifying information for your NSF biographical sketch.



Professional Preparation

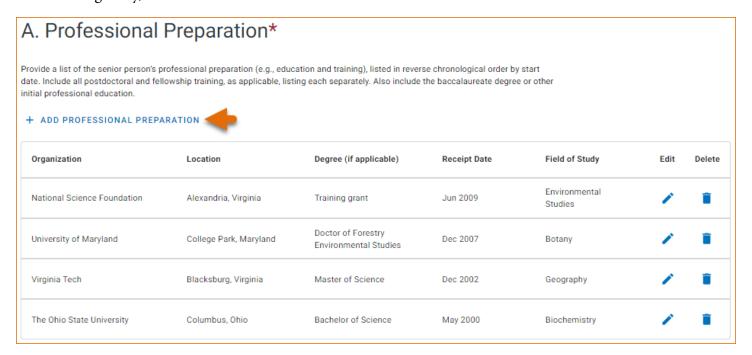
Under Professional Preparation, enter information as required by the Professional Preparation section in PAPPG Chapter II.D.2.h.(i)(a)(3).

1 Click + ADD PROFESSIONAL PREPARATION and select a radio button for either an academic degree or a training entry. Each selection provides a different set of choices.



2. Click "Save." For multiple entries, click "Save & add another entry."

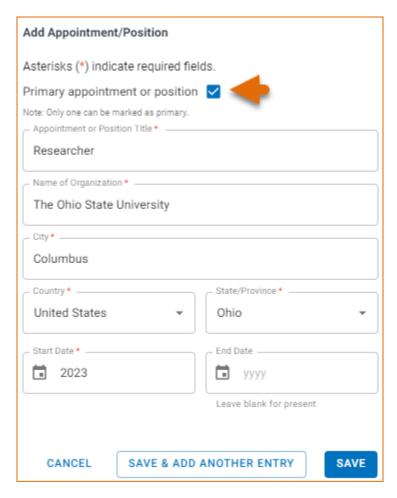
3. To update an entry, click and to remove an entry, click. Once you have finished editing a degree or training entry, click "Save."



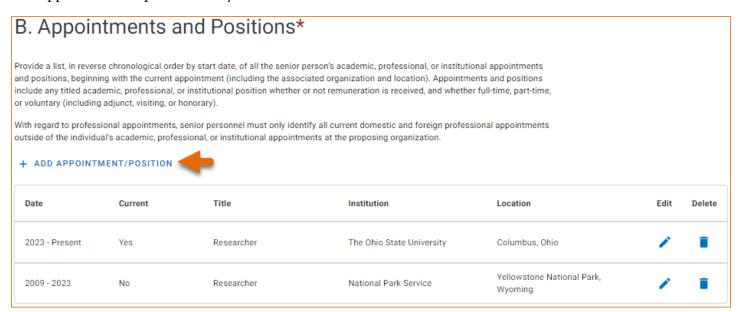
Appointments and Positions

In the **Appointments and positions** section, enter information as required by the Appointments and Positions section in PAPPG Chapter II.D.2.h(i)(a)(4).

1 Enter your present and past employment. If the primary appointment or position is current, check the box as indicated below. For multiple entries, click "Save & add another entry."



2 To update an entry, click and to remove an entry, click. Once you have finished editing an appointment or position entry, click "Save."



Products

In the **Products** section, enter information as required by the Professional Preparation section in PAPPG Chapter II.D.2.h(i)(a)(5).

This section uses My Bibliography to manage product information, and it consists of two parts:

1. Products most closely related to the proposed project (**A**), where you may add up to five products that are most closely related to the proposed project.

2. Other significant products (**B**), where you may add up to five other significant products, whether or not related to the proposed project.

C. Products

Provide a list of: (i) up to five products most closely related to the proposed project; and (ii) up to five other significant products, whether or not related to the proposed project that demonstrate the senior/key person's qualifications to carry out the project. It is up to the individual to determine how to best organize this listing to demonstrate their ability to carry out the project.

Senior/key personnel who wish to include publications in the products section of the Biographical Sketch that include multiple authors may, at their discretion, choose to list one or more of the authors and then "et al" in lieu of including the complete listing of authors' names.

What are acceptable products? >



- · names of authors:
- · product title;
- · date of publication or release;
- · website URL;
- · other persistent identifier (if available); and
- other relevant citation information (e.g., in the case of publications, title of enclosing work such as journal or book, volume, issue, pages).
- . If any of the items specified above is not applicable, enter N/A

Products Most Closely Related to the Proposed Project*



Select up to 5 products

SELECT RELATED PRODUCTS



Other Significant Products, Whether or Not Related to the Proposed Project*



Select up to 5 products

SELECT OTHER PRODUCTS

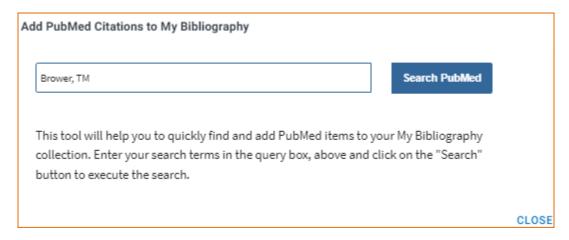


Click "Select citations" to add products from your My Bibliography collection, or if not found there, to add citations for your products (see Creating a bibliography). In My Bibliography the default setting for the Sort by drop-down menu is to list citations by publication date (newest to oldest). Citations can also be sorted by recently updated, author (first listed authors in alphabetical order), or title (alphabetically). Note that after selecting and saving five citations for each Products section, **A** and **B** above, you will be able to organize the selected five citations for each section in the order you consider pertinent by dragging and dropping each citation into different positions.



An ORCID option is available, which you can use to retrieve citations stored in your ORCID iD record (C).

If you find that your My Bibliography collection is not up to date and new PubMed citations need to be added, click "Manage My Bibliography" (see **D** above) and enter an author full name, or last name and initials in the search box.



Select the citations you wish to add from the list of retrieved citations and click "Add to My Bibliography." The newly added citations will immediately display in the My Bibliography tab. For publications that are not included in PubMed, use the options to add citations using a file, or to add citations manually using My Bibliography templates, click "Manage My Bibliography" (see E above).

Product citations in the ORCID tab that have an extended list of contributing authors can be amended to reduce the number of authors displayed. Edited citations highlight the authors directly associated to a biographical sketch while helping to reduce the space that citations take in a required biographical sketch. To edit an extended list of contributing authors in a citation, click "Select citations" and select the ORCID tab. See PAPPG Chapter II.D.2.h(i) for biographical sketch page limitations.



Click the link "Edit authors" link located on the right of the citation that you wish to amend. An "Edit Authors" window will display where you can amend the author list.

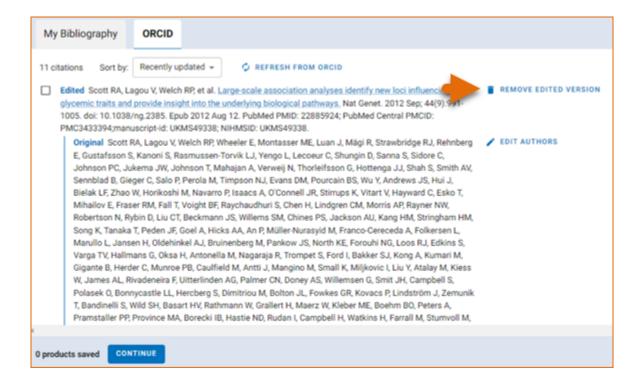


When your edits are complete, be sure to click "Save."



Your edited citations will display above the original citation. Edited citations can be removed by clicking

REMOVE EDITED VERSION



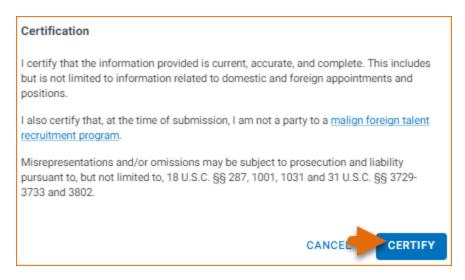
Note:

- If you linked your ORCID iD account to My NCBI, your SciENcv biosketches will have the publications listed in your ORCID iD record under the ORCID tab.
- Citations under the 'My Bibliography' tab can only be deleted in My Bibliography. See Deleting Citations.
- Citations under the 'ORCID' tab can only be deleted if they are deleted in your ORCID iD record.

Certification

After the four sections of the NSF biographical sketch are complete and you are ready to download the document, a window will display asking you to agree to the **certification statement** in order to proceed.

Download the NSF biographical sketch using the button. See the Downloading SciENcv section for additional information.



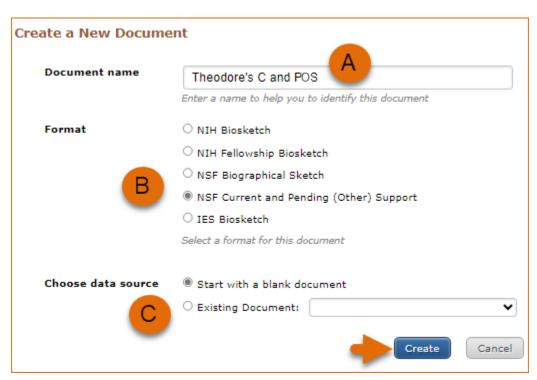
Using the NSF Current & Pending (Other) Support

The National Science Foundation (NSF) requires that each individual designated as senior personnel on a project proposal must separately provide current and pending (other) support information.

Detailed information about the content requirements is available in the NSF *Proposal and Award Policies and Procedures Guide* (PAPPG) Chapter II.D.2.h(ii) To create an NSF Current and Pending (Other) Support document in the NSF compliant PDF format, go to the SciENCV portlet in My NCBI and click "Manage SciENCV" to access your SciENCV documents page. In the Science documents page click "Create New Document."



- 1. Enter a name for your new document (see A below).
- 2. Select NSF Current and Pending Support (C & P(O) S) (B).
- 3. Select "Start with a blank document" or select an existing NSF C & PS document from the drop-down list (C) and click Create.



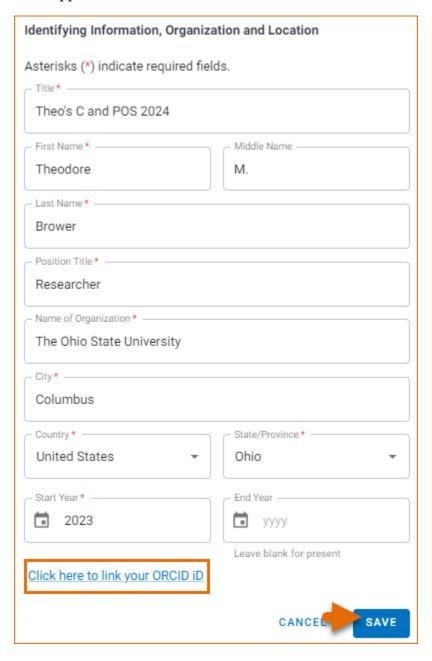
The NSF Current & Pending (Other)Support document consists of four sections: Identifying Information, Organization and Location; Project/Proposal Summary; In-Kind Contribution Summary; Certification.

Use the links below to navigate to the SciENcv instructions for each section:

- Identifying Information, Organization and Location
- Project/Proposal Summary
- In-Kind Contribution Summary
- Certification

Identifying Information, Organization and Location

The **Identifying Information**, **Organization and Location** form includes your first and last name by default, however, these two fields can be amended to include the name of the senior person contributing to the scientific development of the project proposed. Click ADD INFORMATION to include the position title and position starting date, organization's name and location. There is also an option to link the ORCID iD of the senior person to the NSF Current and Pending (Other)Support document.



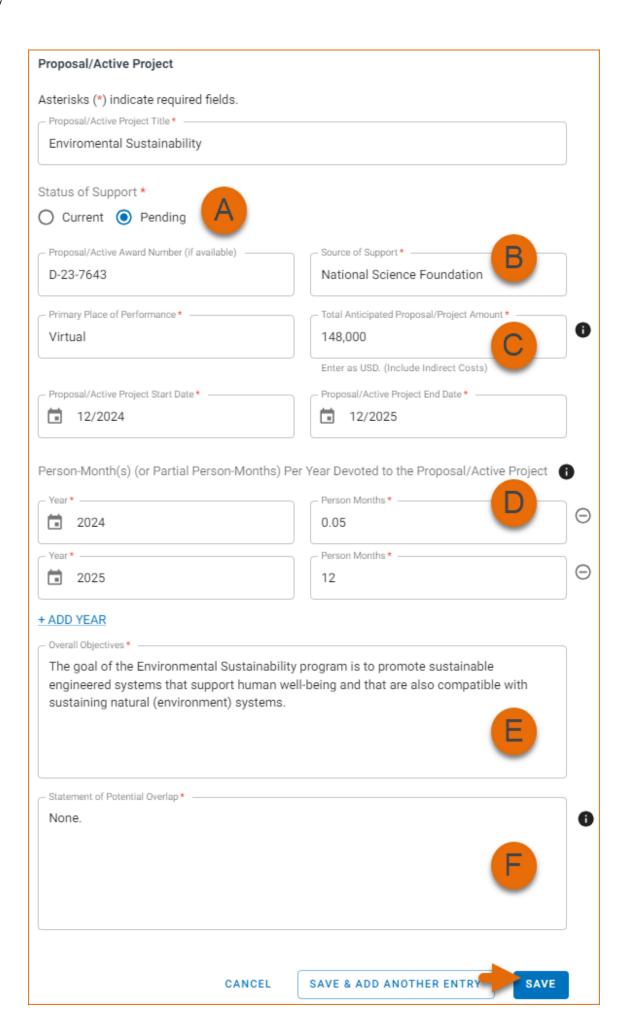
Project/Proposal Summary

In the **Project/Proposal Summary** section, create a Project/Proposal record for all projects currently funded and projects under consideration for funding. Click + ADD PROPOSAL/ACTIVE PROJECT to create a new record for a project or proposal.

- 1. List your Project or Proposal Title.
- 2. Select the Status of Support, current or pending.

3. For projects that are currently funded, select **Current** (see **A** below). See the PAPPG Chapter II.D.2.h(ii) Projects/Proposals section for the definition of "current." For project proposals that are under consideration for funding, select **Pending** (see **A** below). See the PAPPG Chapter II.D.2.h(ii) Projects/ Proposals section for the definition of "pending."

- 4. Enter a proposal or award number (if available).
- 5. Enter the source of support (NSF or other support source, see **B** below).
- 6. Enter the project/proposal primary place of performance.
- 7. The project/proposal total award amount is the award provided or requested for the entire project/proposal period and it should include indirect costs (see C below).
- 8. Enter the project/proposal start and end dates as proposed or approved for funding support.
- 9. Enter how much time the individual anticipates is necessary to complete the scope of work on the proposal and/or active project (see **D** below).
- 10. Provide a brief statement of your overall objectives. Note that this is a requirement. (see E below).
- 11. List other pending proposals which may overlap in scope, budget, or staff time allocation. If there is no potential overlap, enter "None" (see F below).

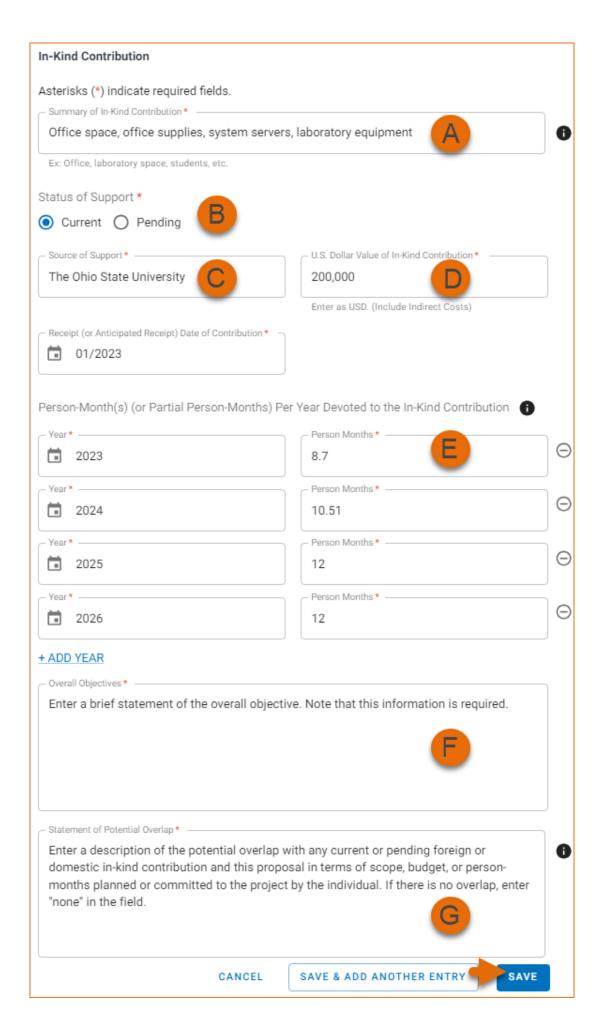


In-Kind Contribution Summary

In the **In-Kind Contribution Summary** section, create an In-Kind Contribution record for all contributions related to current and pending support. Click + ADD IN-KIND CONTRIBUTION to create a new In-Kind Contribution record.

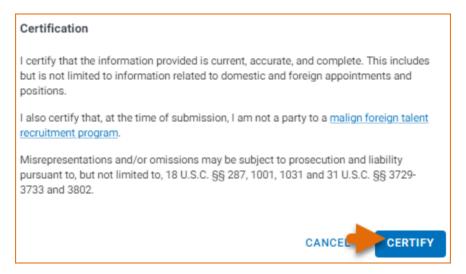
- 1. In the Summary of In-Kind Contributions (see A below), include specific in-kind support.
- 2. Select the Status of Support, current or pending (see **B** below). See the PAPPG Chapter II.D.2.h(ii) In-Kind Contributions section for the definition of "current" and "pending."
- 3. Enter the name of the institution, foundation or entities providing the in-kind contribution (see C below).
- 4. Enter the in-kind contribution U.S. Dollar value, including indirect costs (see **D** below). The Dollar Value of In-Kind Contribution is the assigned value to contributions listed in the summary of in-kind contributions and to the number of staff committed to the project for the entire project period.
- 5. Enter the in-kind contribution start and end dates as proposed or approved.
- 6. Enter how much time the individual anticipates is necessary to complete the scope of work on the proposal and/or active project (see E below).
- 7. Provide a brief statement of your overall objectives. Note that this is a requirement. (see F below)
- 8. List other active or pending proposal or in-kind contribution which may overlap in scope, budget, or staff time allocation (see G below). If there is no potential overlap, enter "None."

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Certification

After the three sections of the NSF Current and Pending Support document are complete and you are ready to download the document *Download PDF* as window will display asking you to agree to the certification statement in order to proceed. Download the NSF biographical sketch using the "Download PDF" button. See the Downloading SciENcv section for additional information.



Using the IES Biographical Sketch

The Institute of Education Sciences (IES), biographical sketch format is the official format used for grant submissions to the IES. Researchers who have their publications indexed in the IES ERIC database can export their ERIC citations to My Bibliography, and use the citations stored in My Bibliography to populate SciENcv biosketches. ORCID ID account holders who have linked their accounts to My NCBI can populate their SciENcv biosketches with the information stored in their ORCID accounts. Information on linking accounts to NCBI can be found in Using a Partner Organization Username and Password.

The IES biographical sketch consists of five sections:

- Education and Training
- Personal Statement

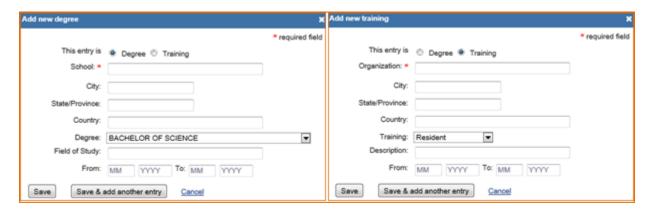
Exporting Citations from ERIC to My Bibliography

- Work Experience, Professional Memberships, and Honors
- Contribution to Education Research
- Research Support/Scholastic Performance

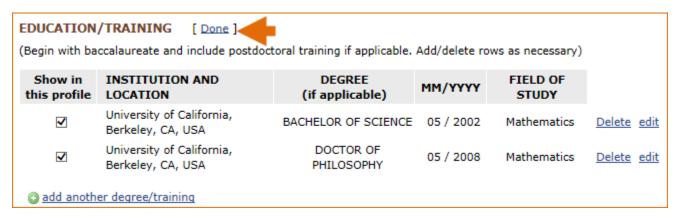
Education and Training

Under the section titled **Education/Training**, click the link "add one." Add your academic degree(s) and training, from oldest to most recently acquired.

1 Select a radio button for either an academic degree or a training entry. Each selection provides a different set of choices.



- 2. Click "Save." For multiple entries, click "Save & add another entry."
- 3. To edit or delete an entry, click "Edit entries" and click either "delete" or "edit" next to the selected degree or training entry. Once you have finished editing, adding, or deleting information, click "Done" to save your updates.



4 In SciENcv there is an option to hide entries. If you want to print or share your profile, but only want selective content to be displayed, uncheck the checkbox next to the entry you would like to hide and click "Done."

Personal Statement

In the **Personal Statement** section, enter a brief personal statement and up to four publications that highlight your work experience and qualifications. To start, click "Edit Statement."



Enter your personal statement and click ✓ to save your narrative. SciENcv uses markdown syntax which allows you to add simple formatting to your personal statement – for formatting help click the ② icon.



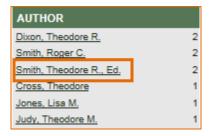
Citations stored in My Bibliography can be uploaded initially by clicking the link "Select citations." Select up to <u>four citations</u> to be displayed in this section. In My Bibliography the default setting for the Sort by drop-down menu is to list citations by date (newest to oldest). Citations can also be sorted by publication date, update date, author (first listed authors in alphabetical order), or title (alphabetically). An ORCiD option is available, which you can use to retrieve citations stored in your ORCiD record (**C**).



If your publications are included in the Institute of Education Studies ERIC database, you can populate SciENcv biosketches with those citations, but first they would need to be added to My Bibliography, which can be accomplished either using an exported file from ERIC, or added manually using My Bibliography templates.

Exporting Citations from ERIC to My Bibliography

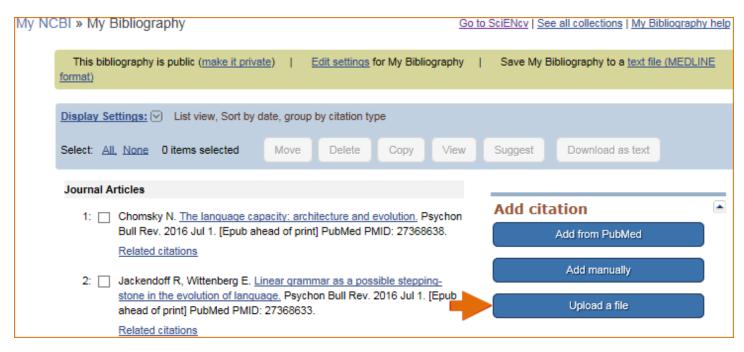
Go to ERIC and enter an author full name, or last name and initials in the search box. For example, "Smith, Theodore R." Or use the ERIC author field in your query **author:** Theodore R. Smith, and click search. To limit your retrieval, select the appropriate author name in the Author limiter on the left side of the screen. For further information on searching the ERIC database, see this IES video.



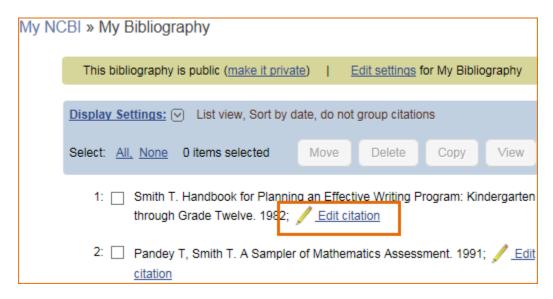
Click "Export," select the number of records to include, and click "Create file"



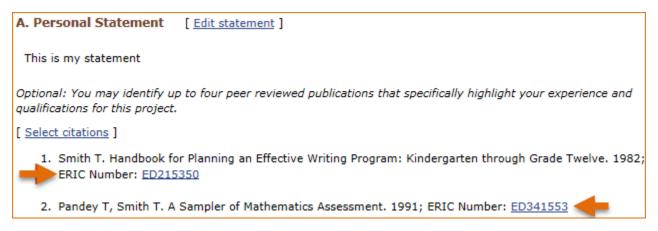
Save the generated file. Sign in to NCBI and click "Manage My Bibliography." In My Bibliography, click "Upload a file".



Upload the ERIC citations file you saved. The citations will display in My Bibliography with a pencil icon, and you will be able to further edit these citations.



The exported ERIC citations will be immediately listed in My Bibliography and ready to be selected in SciENcv. See below an example of newly added citations from ERIC to SciENcv via My Bibliography.



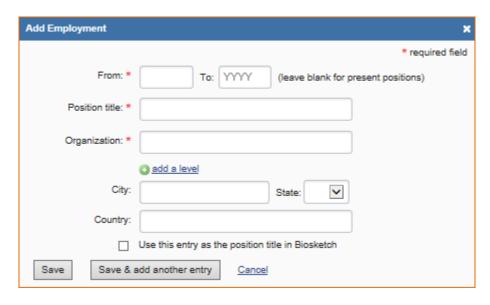
Note:

- If you linked your eRA Commons, NSF, or ORCID account to My NCBI, your SciENcv biosketches will have the biographical information available in those accounts.
- If you linked your ORCID account to My NCBI, your SciENcv biosketches will have the publications listed in your ORCID record under the ORCID tab.
- Citations under the 'My Bibliography' tab can only be deleted in My Bibliography. See Deleting Citations
- Citations under the 'ORCID' tab can only be deleted if they are deleted in your ORCID record

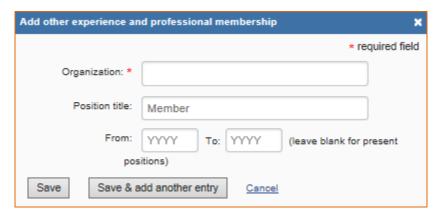
Work Experience, Professional Memberships and Honors

The section titled **Positions and Honors** consists of three parts: employment, other experience and professional memberships, and honors.

1 Under the subtitle Positions and Employment, click "add one." Enter your past and present employment. For multiple entries, click "Save & add another entry."



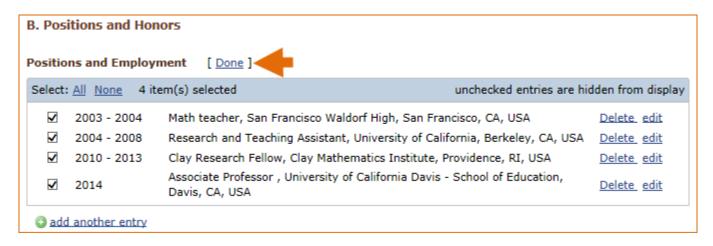
2 Under the subtitle Other Experience and Professional Memberships, click "add one." Enter other work experience and professional memberships.



3 Under the subtitle Honors, click "add one." Enter honor society memberships, honorary titles, and other honorary awards.



4 To edit or delete an entry, click "Edit entries" and click either "delete" or "edit" next to the selected work experience, professional membership, or honor entry. Once you have finished editing, adding, or deleting information, click "Done" to save your updates.



5 In SciENcv there is an option to hide entries. If you want to print or share your profile, but only want selective content to be displayed, uncheck the checkbox next to the entry you would like to hide, and click "Done."

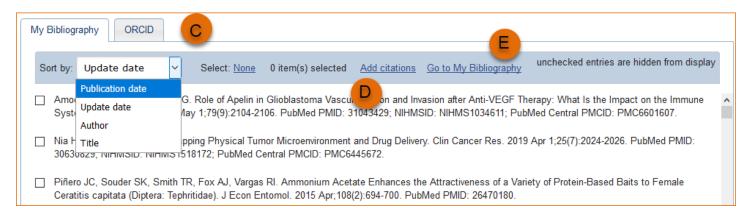
Contribution to Education Research

The Contribution to Education Research section aims to give researchers a place where they can describe five of their most significant contributions to educational research. Each contribution entry has two parts: a description and relevant references of up to four peer-reviewed publications.

To enter a description, click "edit" (**A**), and to add relevant citations from My Bibliography for each contribution, click "Select citations" (**B**). Select up to <u>four citations</u> to be displayed for each contribution.

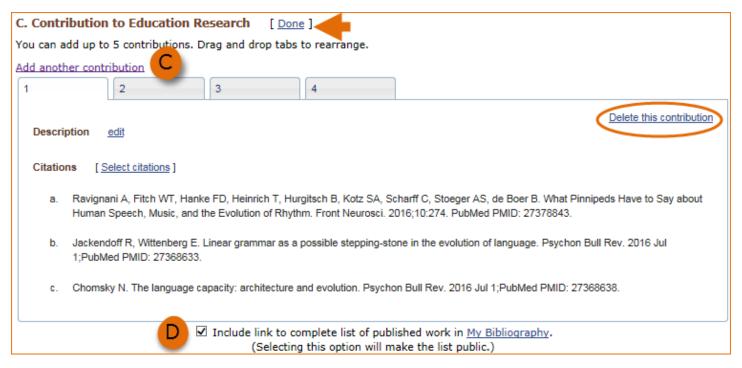


In My Bibliography the default setting for the Sort by drop-down menu is to list citations by date (newest to oldest). Citations can also be sorted by publication date, update date, author (first listed authors in alphabetical order), or title (alphabetically). An ORCiD option is available, which you can use to retrieve citations stored in your ORCiD record (C).



If your publications are included in the Institute of Education Studies ERIC database, you can populate SciENcv biosketches with those citations, but first they would need to be added to My Bibliography, which can be accomplished either using an exported file from ERIC, or added manually using My Bibliography templates.

You can create up to five tabs by clicking "Add another contribution" (**C**), and the display order can be changed by dragging and dropping each tab. Contribution tabs can be removed by clicking "Delete this contribution." To save edits, click "Done."



There is also an option to include a URL to your My Bibliography collection of published research (**D**). Selecting this option would make your My Bibliography collection public.

Note:

- This section uses My Bibliography to manage citation data in SciENcv. Therefore, if you have publications stored in My Bibliography, those will be automatically uploaded to your SciENcv profile.
- If you linked your ORCID account to My NCBI, your SciENcv profiles will have the publications listed in your ORCID record under the ORCID tab.
- Citations under the 'My Bibliography' tab can only be deleted in My Bibliography. See Deleting Citations
- Citations under the 'ORCID' tab can only be deleted if they are deleted in your ORCID record

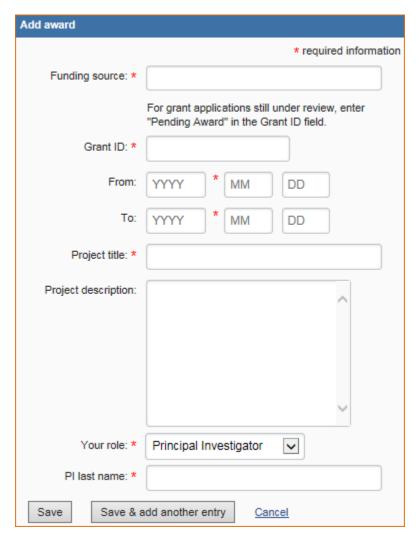
Research Support/Scholastic Performance

The Research Support/Scholastic Performance section displays a list of your ongoing and completed research awards information. If you linked your ORCID account to My NCBI, your SciENcv profiles will have the research awards included in your ORCID record. The research awards information retrieved from ORCID appear under the ORCID tab.



Additionally, you have the option to add awards manually if your research awards were issued by other agencies or institutions:

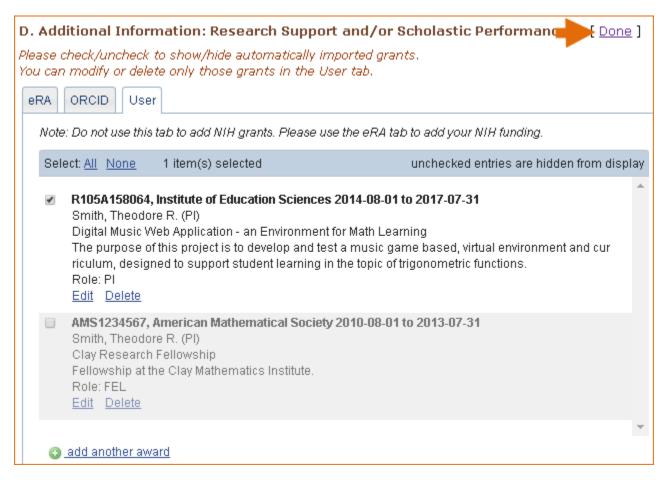
- 1. Click "Edit awards."
- 2. Select the "User" tab.
- 3. Click "Add another award." Enter your ongoing and completed research awards. Be sure to select the appropriate category in the "Your Role" drop-down menu.



4 For multiple entries, click "Save & add another entry."

In SciENcv, you can selectively hide the research awards that you wish to omit from displaying in your profile. To hide citations:

- 1. Click "Edit Awards." Research awards are organized in four tabs: eRA, HRA, ORCID and User. The HRA and ORCID tabs appear only when award data is transferred from HRA, or ORCID. The User tab stores manually added research award information.
- 2. Locate the awards you want to hide
- 3. Uncheck the awards you want to hide, and click "Done."



4. The research award shown in gray above is hidden and consequently it will not be displayed when a SciENCV biosketch is shared through a URL or printed.

Note:

- Only research awards in the User tab can be modified or deleted in SciENcv
- Awards under the 'ORCID' tab can only be edited/deleted in your ORCID record

Editing and Deleting SciENcv Biosketches

Once you have created a few biosketches in SciENcv, the SciENcv portlet will display all the existing biosketches in your My NCBI account. To return to any of those biosketches to edit their content, select the biosketch that you wish to amend directly in the SciENcv portlet.



To delete a SciENcv biosketch, click "Manage SciENcv" in the SciENcv portlet. The resulting page is the SciENcv main page. Next to the heading SciENcv documents, click **Edit**, and the delete and edit links will display.



Select the delete link next to the biosketch that you wish to delete. To close the Delete/Edit view, click **Done**.



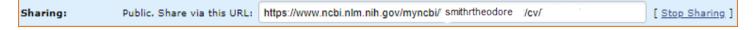
Sharing SciENcv

SciENcv biosketches are set as private by default. However, they can be shared with others through a public URL. Each biosketch can be independently set up as private or public, and their current status can be viewed immediately on the SciEncv portlet.



To change a SciENcv biosketch from **private to public:**

- 1. Sign in to My NCBI. Go to the SciENcv portlet and select the biosketch that you wish to change to public.
- 2. Next to 'Sharing,' click **Change.** A URL will be provided, which you can use to share your SciENcv biosketch with others.



3 To change your SciENcv biosketch back to private, click "Stop Sharing."

Note:

- Any time someone uses a public SciENcv URL to see your biosketches; the retrieval will include all the items currently displayed in your SciENcv biosketches. Hidden items will not be displayed.
- Adding, hiding, or deleting items in a SciENcv biosketch does not require an update to your public URL.
- If a SciENcv biosketch is changed back to private, the public URL will no longer function.

Downloading SciENcv

SciENcv biographical sketches can be downloaded in three formats: PDF, MS Word, and XML.

To download a SciENcv biosketch:

1. Sign in to My NCBI. Go to the SciENcv portlet and select the biosketch that you wish to download.

2. Click the hyperlink of the format you wish to download.



The NSF Biographical Sketch and Current and Pending (Other) Support documents can be viewed as a draft for review or can be downloaded in a PDF format that is NSF compliant.



Adding Delegates to SciENcv

My NCBI users can grant access to other persons (delegates) to view and manage their SciENcv biosketches. The delegates will then be able to create, modify or delete the information in the SciENcv account to which they have been granted access.

The option to **Add a delegate** is available through the Accounts Settings page. The Delegates section of the Account Settings page displays a list of all the delegates granted access to either your My Bibliography collection or your SciENcv, or both. In the Delegates section you may add or remove delegates as well as **modify the access** granted, see 'Adding and Removing Delegates.'

Working with Filters

Created: December 13, 2010; Revised: June 28, 2021.

NCBI databases search results can be narrowed down to smaller groups of data using filters. In My NCBI, you can select your preferred filters to be active every time you run a search. For example, in the PubMed database, filters can be used to group results into reviews, clinical trials, or citations with free full text links, among other choices. Users may also create custom filters.

There is a limit of five filters (including custom filters) that can be selected for all NCBI databases, except for PubMed, where the maximum number of filters allowed is 15.

NCBI started the transition to use only federated account credentials for NCBI account login on June 1st, 2021. The deadline for transitioning all NCBI accounts to 3rd-party only login is June 2022. Please read the below FAQs and write to info@ncbi.nlm.nih.gov if you have any questions.

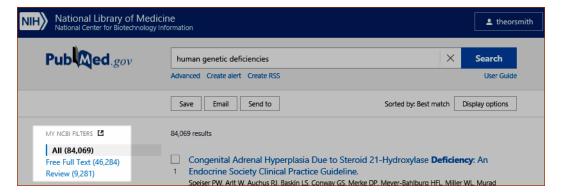
https://ncbiinsights.ncbi.nlm.nih.gov/ncbi-login-retirement-faqs

Section Contents

- The Filter Display
- Setting Up Filters
- Creating Custom Filters

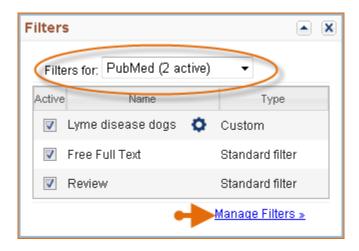
The Filter Display

In the figure below, a search in PubMed with the term *human genetic deficiencies* generated 84,069 citations. Two filters have been activated: **Review** and **Free Full Text**. Filtered results with their respective counts are displayed as links: Review (9,281 citations) and Free Full Text (46,284 citations).

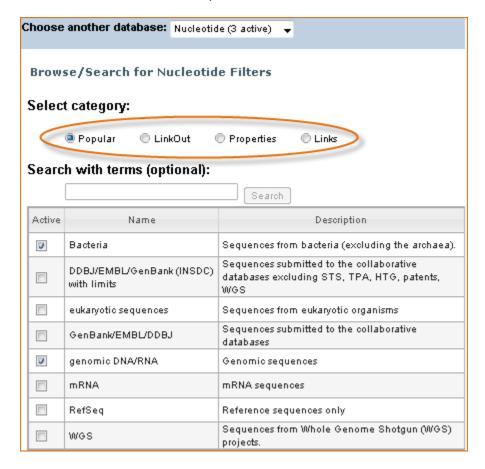


Setting Up Filters

To set up filters, go to the Filters portlet, select the database for which you want to establish filter preferences, and click the link **Manage Filters**.



In the Filters page, users can browse a list of filters that is divided in four categories: **Popular**, **LinkOut**, **Properties** and **Links**. To select and activate a filter, click the checkbox next to the filter name.



The "Popular" category lists the most commonly requested filters according to each NCBI database. For example, the filters Bacteria and genomic DNA/RNA are requested for Nucleotide.

The "LinkOut" category groups records that have links to resources provided by outside organizations, such as full-text publications, biological databases, consumer health information, and research tools. These links provide supplemental information related to records in NCBI databases. For example, users looking for affinity data can select the Binding database as a filter in PubMed.

Working with Filters 99

The "Properties" category groups database records according to specific criteria for each database, such as languages, gender, age groups, publication type for PubMed; biosource, molecule type, RefSeq for Nucleotide among many others.

The "Links" category groups database records that have links to other NCBI databases. For example, you can select "Links to Genome" to create a result link that groups all records retrieved in a search that have links to the Genome database. This new filter is active every time you search any NCBI database (see image below).



Note:

- To deactivate filters, uncheck the box next to the filter name
- To see your active filters and icon settings, check the Filter list for each database

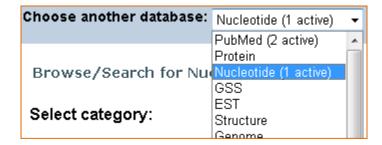
LinkOut and **Properties** are divided into subcategories that may include additional subcategories. You may choose to have either a single filter added to your search results or an entire category or subcategory

- If you know the name of a filter you are interested in, you can search for filter names and descriptions using the Search with Terms search box
- Some databases have a default set of result filters that are active whether you have a My NCBI account or not. Default filters are replaced by your filter preferences, which can also be accessed and changed from all databases results pages. When on a results page, look for "Filter you results" and click the link "Manage Filters" to access your filter preferences list

Creating Custom Filters

It is possible to customize your own filters for any NCBI database. To create a custom filter:

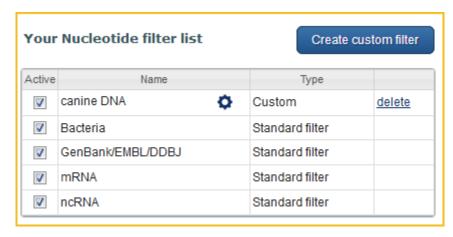
- 1. Sign into My NCBI and go to Filters, click the link Manage Filters
- 2. Choose the database for which you want to create a custom filter from the drop-down list.



3. Click the button Create custom filter

4. On the pop-up window, enter the Name for this custom filter and the Search terms that you wish to use for this filter. Note that queries should not be longer than 4,000 characters and should not include terms with truncation (asterisk).

- 5. You can then click "Run Filter" to see the number of items retrieved by the custom filter search.
- 6. If you are satisfied with the custom filter, click "Save Filter." Your new custom filter will be automatically activated and displayed in the database filter list.



- 7. To modify a custom filter, click the gear icon and then amend the filter Name and Search terms.
- 8. To deactivate filters, uncheck the box next to the filter name.

Examples of custom filters for PubMed:

Filter type	Filter search
Address of first author	mayo [ad] AND clinic [ad]
Items from particular journals	Birth Defects Res A Clin Mol Teratol [ta] OR Birth Defects Res B Dev Reprod Toxicol [ta] OR Birth Defects Res C Embryo Today [ta] OR Clin Dysmorphol [ta] OR Congenit Anom Kyoto [ta]
Any term	delivery of health care [mh]
Any combination of terms	clinical trial [pt] AND aged [mh]
Free text searching	health disparities

Using Preferences

Created: December 13, 2010; Revised: June 28, 2021.

My NCBI preferences and customization links can be found at the top right corner of the My NCBI homepage.

My NCBI

Customize this page | NCBI Site Preferences | Video Overview | Help

Users can customize the appearance of the My NCBI homepage display and select their preferences for: displaying the links menu, activating search term highlighting, saving shared settings, setting up and activating filters, and customizing the search results display.

Please write to info@ncbi.nlm.nih.gov if you have any questions.

Section Contents

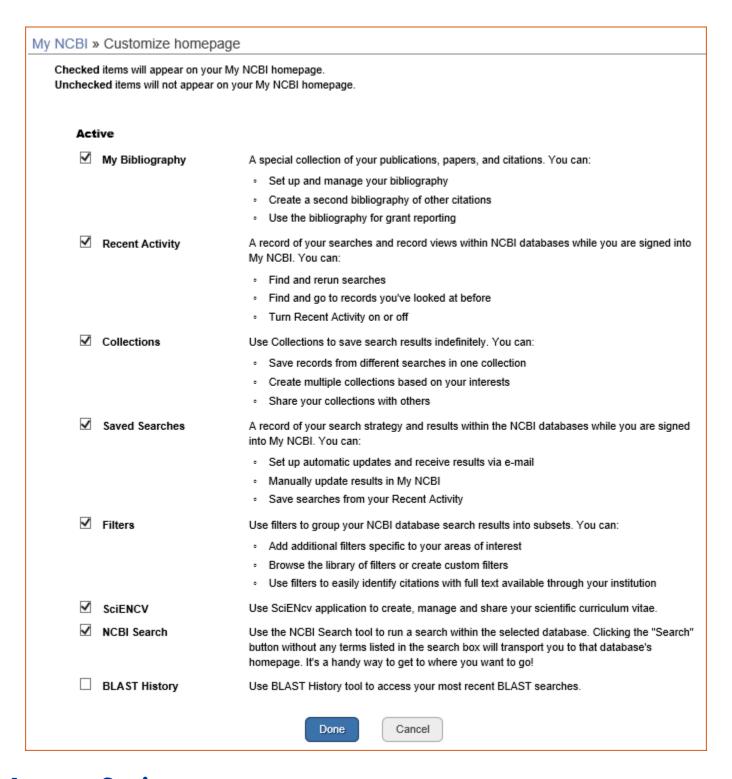
- Customizing the My NCBI homepage
- Account Settings
 - Changing your E-mail Address
 - Changing your Password
 - Changing your Security Question
 - Linked Accounts
 - Adding or Removing Delegates
 - Creating an API Key
- Common Preferences
 - Highlighting Search Terms
 - Shared Settings
- PubMed Preferences
 - Setting up PubMed Filters
 - Selecting Outside Tool
 - Displaying Author Information
 - Customizing the Search Results Display
- PMC Preferences
 - Selecting Article View
- Gene Preferences
 - Setting up Gene Filters
 - Customizing the Search Results Display
- GTR Preferences
 - Selecting Preferred Labs
- Nucleotide Preferences
 - Setting up Nucleotide Filters
 - Customizing the Search Results Display
- Protein Preferences
 - Setting up Protein Filters
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Customizing the My NCBI Homepage

The homepage display can be customized by dragging and dropping each function window to the top or bottom of the page. Each function window can also be minimized or removed from the homepage display.

Users may select or deselect any of the function windows from appearing in the My NCBI homepage. To deselect any function window, click on the "Customize this page" link and uncheck any of the functions that you do not want to see in your My NCBI homepage.



Account Settings

After signing in to your My NCBI account, click on your username on the NCBI header to access the Account Settings page.



Changing your E-mail Address

To change your e-mail address:

- 1. Click on your **Username** to access the Account Settings page
- 2. Click the "Change" button next to the current e-mail address
- 3. Enter your account password
- 4. Enter an e-mail address
- 5. Click Save.

Note:

A confirmation e-mail message will be sent to the new e-mail address to activate automatic e-mail updates

Changing your Password

NCBI started the transition to use only federated account credentials for NCBI account login on June 1st, 2021. The deadline for transitioning all NCBI accounts to 3rd-party only login is June 2022. Please read the below FAQs and write to info@ncbi.nlm.nih.gov if you have any questions.

https://ncbiinsights.ncbi.nlm.nih.gov/ncbi-login-retirement-faqs

Journal publishers who use My NCBI login for PMDM should write to publisher@ncbi.nlm.nih.gov for feedback on login or access to PMDM.

To change your password:

- 1. Click on your **Username** to access the Account Settings page
- 2. Click the "Change" button
- 3. Enter your current account password
- 4. Enter your new account password and repeat the new account password
- 5. Click Save.

Changing your Security Question

NCBI started the transition to use only federated account credentials for NCBI account login on June 1st, 2021. The deadline for transitioning all NCBI accounts to 3rd-party only login is June 2022. Please read the below FAQs and write to info@ncbi.nlm.nih.gov if you have any questions.

https://ncbiinsights.ncbi.nlm.nih.gov/ncbi-login-retirement-faqs

Journal publishers who use My NCBI login for PMDM should write to publisher@ncbi.nlm.nih.gov for feedback on login or access to PMDM.

To change your security question:

- 1. Click on your **Username** to access the Account Settings page
- 2. Click the "Change" button next to the security question
- 3. Enter your account password
- 4. Enter a security question and answer
- 5. Click Save.

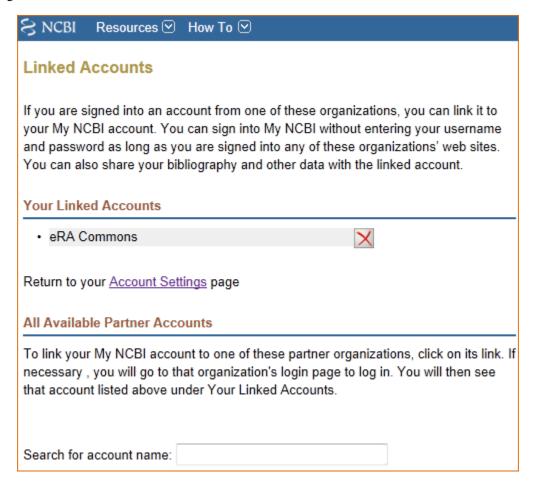
Linked Accounts

Go to "Linked Accounts" to view or remove partner organization accounts that are currently linked to your My NCBI account. You may also search for a different partner account to link to your My NCBI account.

To view or delete linked accounts:

- 1. Click on your **Username** to access the Account Settings page
- 2. Click the "Change" button next to Linked Accounts
- 3. To remove a linked account, click on the red X.
- 4. Click Save.

To **link** your My NCBI account to a partner account: repeat steps 1 and 2 and search for a partner account. If available, click on the partner organization link displayed. Then, log in at the partner organization page with your partner organization credentials.



Adding and Removing Delegates

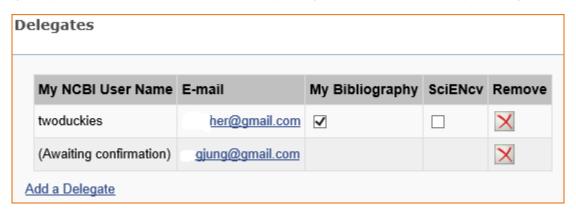
Delegates are persons who are granted access by NCBI account owners to view and manage their My Bibliography collection and/or their SciENcv profile. Delegate invitations are initiated by NCBI account owners.

To add a delegate to manage your My Bibliography and/or SciENcv data:

- 1. Log in to your NCBI account, and click on your username (top right corner of page) to access the Account Settings page
- 2. Go to the "Delegates" section and click "Add a Delegate" link
- 3. Enter the delegate's e-mail address, and click **OK**

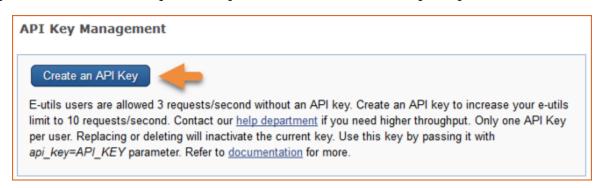
4. Your delegate will receive an e-mail with a URL that leads to an access confirmation page. For further information, see confirming a My Bibliography connection for delegates.

The **Delegates** section of the Account Settings page displays a list of all the delegates granted access to either your My Bibliography collection or your SciENCV professional profile, or both. In the Delegates section you may add or remove delegates as well as **modify the access** granted by checking or unchecking the boxes under the My Bibliography or SciENcv columns. Additionally, delegates can be **removed** by clicking on the **red X**.



Creating an API Key

Web services developers and other users of NCBI E-Utilities can create an API key in Account Settings. An API key is required for Web service requests set up to make more than three requests per second to E-Utilities.



Users who need to make more than ten requests per second should contact: eutilities@ncbi.nlm.nih.gov.

To create an API key using your NCBI account:

- 1. Click on your **Username** to access the Account Settings page
- 2. Go to the "API Key Management" section and click the button "Create an API key"
- 3. An API Key will be generated for you.
- 4. Click the "Replace" button to generate a new API key. Note that the previously issued API key will be inactivated.

Common Preferences

Highlighting Search Terms

You can choose to have your search terms highlighted in retrieved database records. By default, this option is off, but you can pick one of the ten colors available in the Highlighting section of the NCBI Site Preferences to have your search terms highlighted. Highlighting is only active when you are signed into My NCBI.

Terms other than the one(s) you have used in your query are also highlighted at times. For example, if you search PubMed using the term 'cancer', you will also find citations with the term 'neoplasm' highlighted. That is because the NCBI search engine has a dictionary of synonymous terms, such as 'cancer' and 'neoplasm' that are equally considered when you search a database using one of them.

In some cases, you will retrieve PubMed citations that have no highlighting in the abstracts, which means that neither the search term nor a synonymous word was found in the abstracts. However, terms that appear as MeSH (Medical Subject Headings) terms or Substances on a record will be highlighted in the supplemental information section of the citation.

Shared Settings

This is an option that institutions can utilize in order to have their users' access NCBI databases with the preferences they select. The Shared Settings option allows users to set up Filters, Highlight color for search terms, and Outside Tool all at once instead of having to set these options separately.

To create shared settings:

- 1. Click the **Shared Settings** link.
- 2. Select which settings to share by clicking the appropriate box.
- 3. Save
- 4. You can then create a URL, https://pubmed.ncbi.nlm.nih.gov?myncbishare=**username**, where the **username** is the shared My NCBI account name. This URL can be used to create a link or button for PubMed on a library's Web site.

Note:

- Settings activated using a My NCBI shared account URL will timeout after eight hours of inactivity
- A user accessing PubMed using shared settings is not signed in to My NCBI and consequently My NCBI will not display a username
- If a user signs in to My NCBI, the settings for their personal account will take precedent over the shared account settings

PubMed Preferences

Setting Up PubMed Filters

NCBI databases search results can be narrowed down to smaller groups of data using filters. You can select your preferred PubMed filters to be active every time you run a search. For example, filters can be used to group results into reviews, clinical trials, or citations with free full text links, among other choices. You may also create your own custom filters. There is a limit of 15 filters for the PubMed database. For a detailed explanation on how to set up filters, see Working with Filters.

Selecting Outside Tool

Outside Tool allows libraries to add a link from PubMed citations to a link resolver available at their institution. These links are displayed as icons in the PubMed Abstract display (see image below). In My NCBI preferences for PubMed, users can enable up to five libraries' Outside tool icons to display in PubMed.



When you click on the Outside tool icon, you are directed to the available services for that citation offered by the sponsoring library. These services might include access to electronic full text or information on local print journal holdings.

To turn on an Outside Tool, click the **Outside Tool** link under PubMed preferences. Select up to five institutions from the available list and the selected libraries' icons will display in the Abstract format. For more information, see Outside Tool.

Author Information Display

Author Affiliations appear in the PubMed abstract display below the author names, and it is normally closed by default:



To change the default to make the author information available in the abstract display:

- 1. Click the link Author Information under PubMed preferences
- Check Open

Save



The author affiliation information will be available when signed in to My NCBI.

Customizing the Search Results Display

The PubMed default for displaying search results is the Summary display format. To change the search results to display in the Abstract format, log in to My NCBI and click "NCBI Site Preferences" and then "Result Display Settings" under PubMed Preferences. In the resulting page select the Abstract format. Afterwards, your search results will display in the Abstract format while logged in to My NCBI.



PMC Preferences

Selecting Article View

The PubMed Central (PMC) full text database default article view format is HTML, however, users can select the PMC PubReader as a default in My NCBI. Sign in to My NCBI and click "NCBI Site Preferences" and then "Article View" under PMC Preferences. In the resulting window, select PubReader or Classic (HTML) and click save. Information on PubReader can be found here.



Gene Preferences

Setting up Gene Filters

NCBI databases search results can be narrowed down to smaller groups of data using filters. You can select your preferred Gene filters to be active every time you run a search. You may also create your own custom filters.

There is a limit of 5 filters for the Gene database. For a detailed explanation on how to set up filters in My NCBI, see Working with Filters. To see an explanation of the different types of filters available for the Gene database see Gene Help-filters.

Customizing the Search Results Display

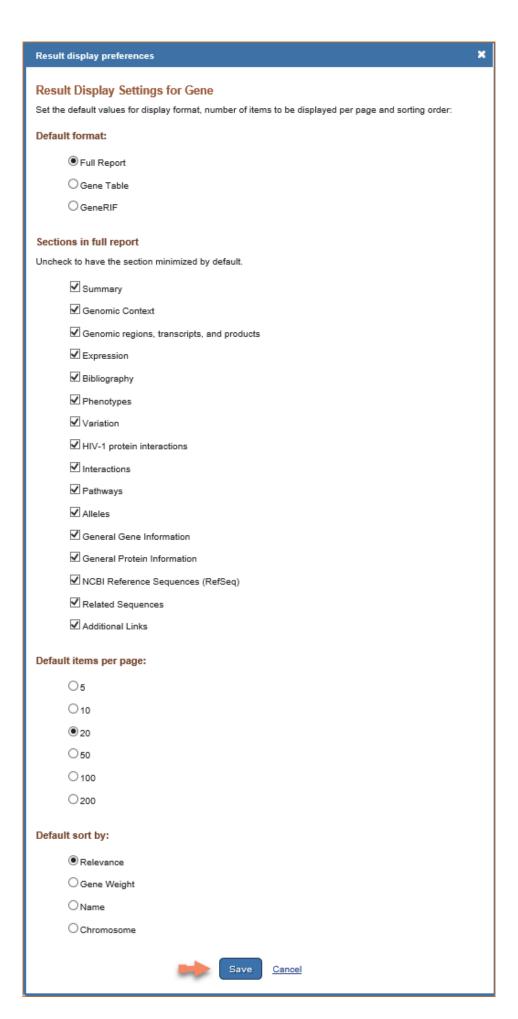
The Gene database default format for displaying search results is Full report, 20 records per page, and sorted by Relevance.

The full report display includes the following sections: Summary, Genomic Context, Genomic regions/ transcripts/products, Expression, Bibliography, Phenotypes, Variation, HIV-1 protein interactions, Interactions, Pathways, Alleles, General Gene Information, General Protein Information, NCBI Reference Sequences (RefSeq), Related Sequences, and Additional Links.

To customize the search results display, log into My NCBI and click "NCBI Site Preferences" and then click "Result Display Settings" under Gene Preferences. In the resulting page select either the Full report, Gene Table, or Gene RIF format. You can specify the sections you want included in the Full report by checking the box next to the section name. For information on the different types of display formats available for the Gene database see Gene Help-display/settings.

To customize the search results display for number of records per page and sorting order, select the number of records to be displayed per page (5, 10, 20, 50, 100, or 200) and the sort order (Relevance, Gene Weight, Name. or Chromosome).

For information on Display Settings in the Gene Database, see Gene Help.



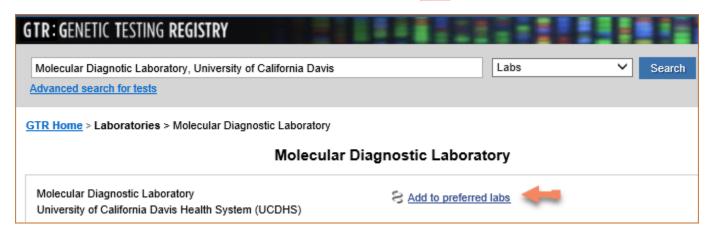
GTR Preferences

Selecting Preferred Labs

You can select your preferred Laboratories for the Genetic Testing Registry (GTR) database using My NCBI, which will help limit your search results to the tests offered by the laboratories selected.

In NCBI Site Preferences:

- 1. Click the link "Preferred Labs" under GTR preferences.
- 2. Click "GTR Website." Select the Labs tab. Enter a laboratory name in the search box.
- 3. Click the button "Add to preferred labs." GTR video tutorials Fundamental (2) Trutofall (2) Trutofall (3) Trutofall (4) Truto



Nucleotide Preferences

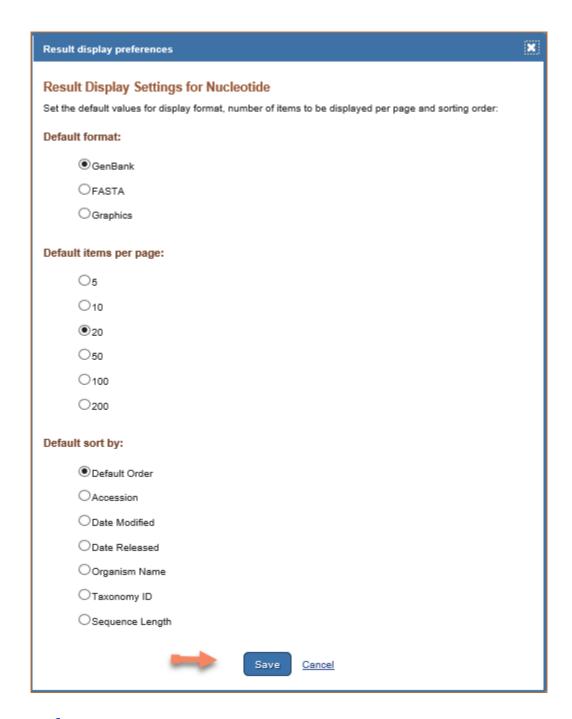
Setting up Nucleotide Filters

You can select your preferred Nucleotide filters to be active every time you run a search. You may also create your own custom filters. There is a limit of 5 filters for the Nucleotide database. For a detailed explanation on how to set up filters in My NCBI, see Working with Filters.

Customizing the Search Results Display

The Nucleotide database default format for displaying search results is GenBank. To customize the search results display format, log in to My NCBI and click "NCBI Site Preferences" and then click "Result Display Settings" under Nucleotide Preferences. In the resulting page select either the GenBank, FASTA, or Graphics format.

The number of records per page and sorting order can also be customized in My NCBI. For information on the different types of display formats available for the Nucleotide database see Nucleotide FAQ



Protein Preferences

Setting up Protein Filters

You can select your preferred Protein filters to be active every time you run a search. You may also create your own custom filters. There is a limit of 5 filters for the Protein database. For a detailed explanation on how to set up filters in My NCBI, see Working with Filters.

Customizing the Search Results Display

The Protein database default format for displaying search results is GenPept. To customize the search results display format, log in to My NCBI and click "NCBI Site Preferences" and then click "Result Display Settings" under Protein Preferences. In the resulting page select either the GenPept, FASTA, or Graphics format.

The number of records per page and sorting order can also be customized in My NCBI. Select the number of records to be displayed per page (5, 10, 20, 50, 100, or 200) and the sort order (Accession, Date Modified, Date Release, Organism Name, or Taxonomy ID).

For information on the different types of display formats available for the Nucleotide database see Protein FAQs

Result display preferences	×
Result Display Settings for Protein Set the default values for display format, number of items to be displayed per page and sorting order:	
Default format:	
Ofasta	
Ographics	
Default items per page:	
O ₅	
○10	
○50	
○100	
○200	
Default sort by:	
Default Order	
OAccession	
O Date Modified	
O Date Released	
Organism Name	
○ Taxonomy ID	
Save <u>Cancel</u>	

GSS Preferences

Customizing the Search Results Display

The GSS (Genome Survey Sequence) database default format for displaying search results is GSS. To customize the records display format, log into My NCBI and click "NCBI Site Preferences" and then click "Record Display Format" under GSS Preferences. In the resulting window select, either GSS, GenBank or FASTA format.

The GSS database default settings for displaying search results are: 20 records per page and sorted by Default Order. Default order follows the same display order as GenBank: last into the database first displayed. To change the number of records to display per page and sort order, select the number of records to be displayed per page (5, 10, 20, 50, 100, or 200) and to change the sort order (Accession, Date Modified, Date Release, Organism Name, or Taxonomy ID).

For information on the GSS database see Entrez Sequences Help.

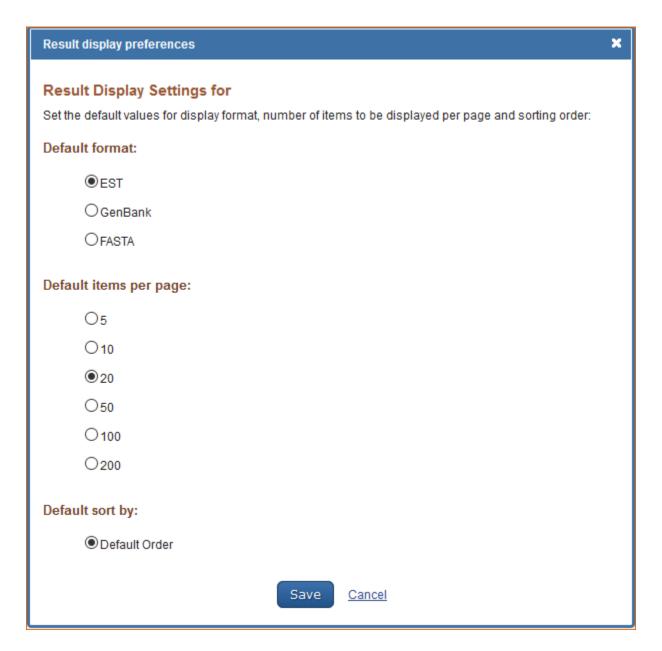
EST Preferences

Customizing the Search Results Display

The EST (Expressed Sequence Tag) database default format for displaying search results is EST. To customize the records display format, log in to My NCBI and click "NCBI Site Preferences" and then click "Record Display Format" under EST Preferences. In the resulting window select, either EST, GenBank or FASTA format.

The EST database default settings for displaying search results are: 20 records per page and sorted by Default Order. Default order follows the same display order as GenBank: last into the database first displayed. To change the number of records to display per page, select the number of records to be displayed per page (5, 10, 20, 50, 100, or 200) and to change the sort order (Accession, Date Modified, Date Release, Organism Name, or Taxonomy ID).

For information on the EST database see Entrez Sequences Help



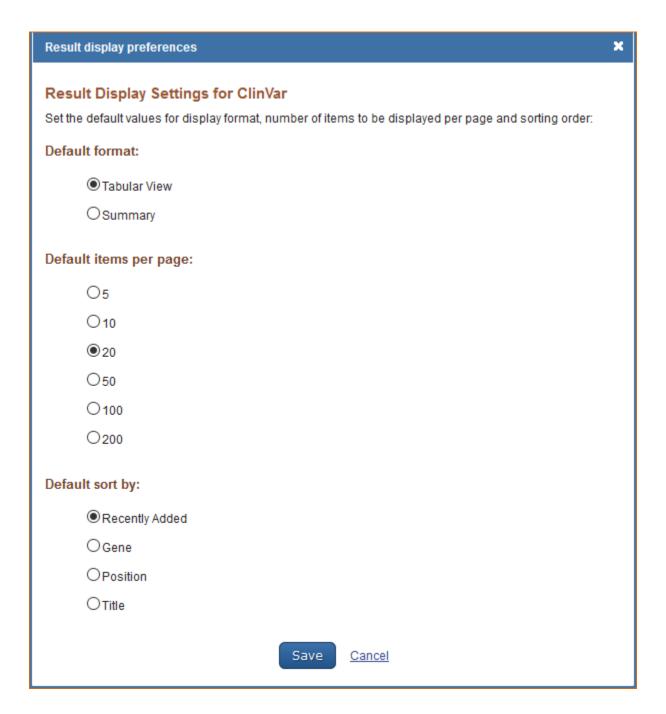
ClinVar Preferences

Customizing the Search Results Display

The ClinVar database default format for displaying results is tabular view. To customize the records display format, log in to My NCBI and click "NCBI Site Preferences" and then click "Record Display Format" under ClinVar Preferences. In the resulting window select, either Tabular View or Summary format.

The ClinVar database default settings for displaying search results are: 20 records per page and sorted by Recently Added. To change the number of records to display per page, select the number of records to be displayed per page (5, 10, 20, 50, 100, or 200) and to change the sort order (Recently Added, Gene, Position or Title).

For information on the ClinVar database see ClinVar FAQs.

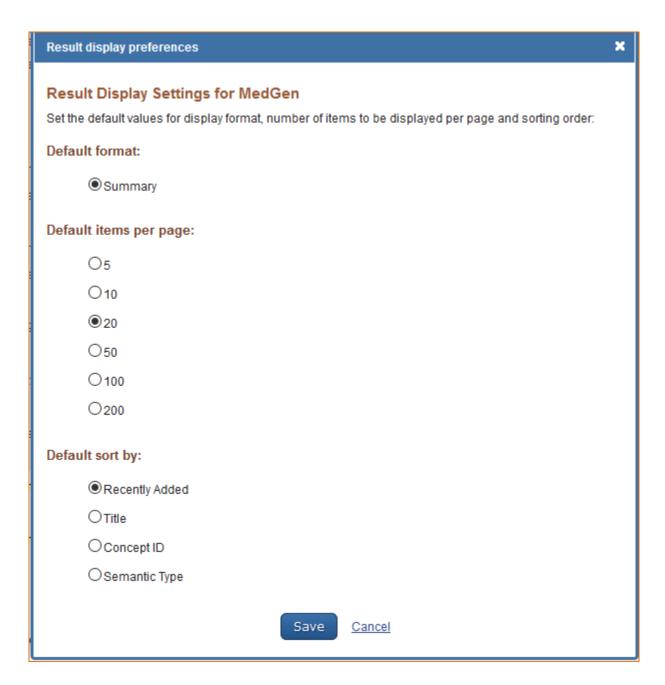


MedGen Preferences

Customizing the Search Results Display

The MedGen database default settings for displaying search results are: 20 records per page and sorted by Recently Added. To change the number of records to display per page and the search results sorting order, log in to My NCBI and click "NCBI Site Preferences" and then select "Record Display Format" under MedGen Preferences. In the resulting window select the number of records to be displayed per page (5, 10, 20, 50, 100, or 200) and select the sort order for search results (Recently Added, Title, Concept ID or Semantic Type).

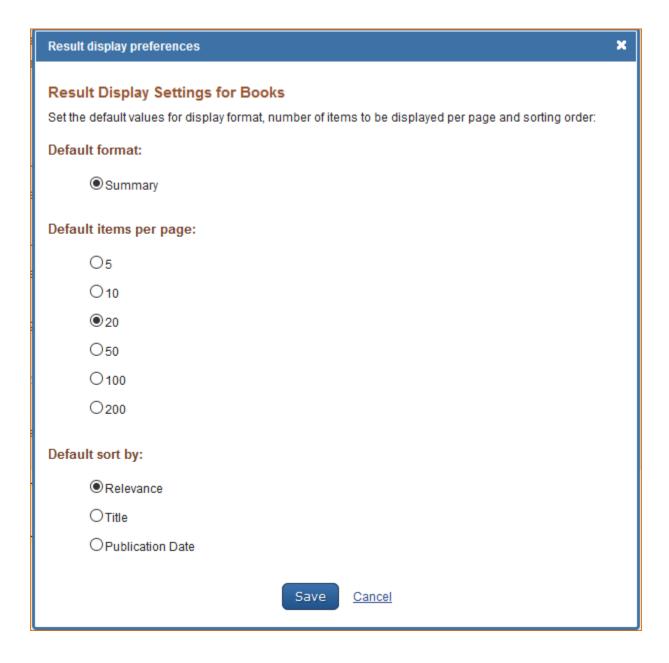
For information on the MedGen database see MedGen Help.



Books Preferences

Customizing the Search Results Display

The Books database default settings for displaying search results are: 20 records per page and sorted by Relevance. To change the number of records to display per page and the search results sorting order, log in to My NCBI and click "NCBI Site Preferences" and then select "Record Display Format" under Books Preferences. In the resulting window select the number of records to be displayed per page (5, 10, 20, 50, 100, or 200) and select a sort order for search results (Relevance, Title or Publication Date).



Recent Activity

Created: December 13, 2010; Revised: June 28, 2021.

Recent Activity provides users a history of their searches and records in NCBI databases for the last 6 months. All searches and records in Recent Activity are hyperlinked so that users can easily view them again or keep a record of all past queries. Recent Activity will only save results for My NCBI users when they are signed in.

NCBI started the transition to use only federated account credentials for NCBI account login on June 1st, 2021. The deadline for transitioning all NCBI accounts to 3rd-party only login is June 2022. Please read the below FAQs and write to info@ncbi.nlm.nih.gov if you have any questions.

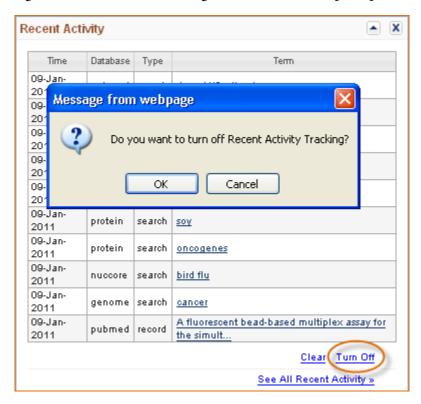
https://ncbiinsights.ncbi.nlm.nih.gov/ncbi-login-retirement-faqs

Section Contents

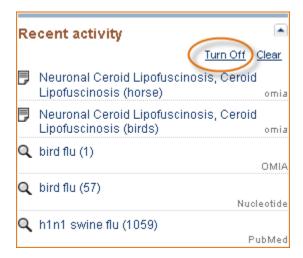
- Turning Off Recent Activity
- Clearing Recent Activity
- Sorting Recent Activity
- Deleting Items in Recent Activity
- Creating Saved Searches in Recent Activity
- Moving Recent Activity Records to Collections

Turning Off Recent Activity

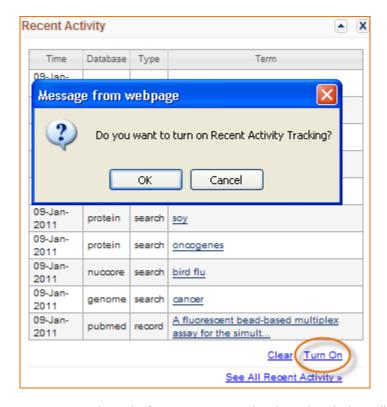
Recent Activity is automatically defaulted to be turned On. Users can select instead not to have searches and records recorded by clicking "Turn Off" and confirming the selection when prompted.



You can also turn off Recent Activity directly from any NCBI database. You will notice that in any NCBI database, a Recent Activity box is present to the right of the screen. Click **Turn Off.**



If at a later time you would like to turn on Recent Activity, click on the link "Turn On" in My NCBI- Recent Activity.



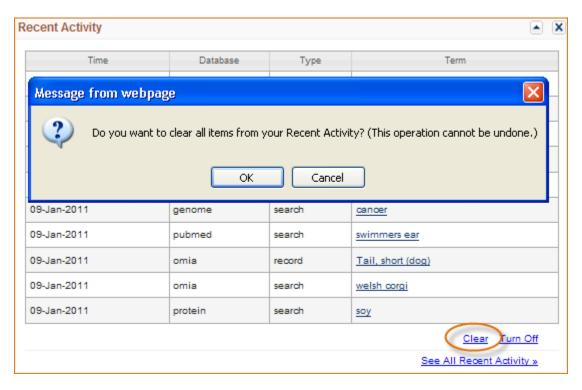
Or you can also activate Recent Activity directly from any NCBI database by clicking "Turn On" as shown below.



Clearing Recent Activity

To clear all Recent Activity items, click the "Clear" hyperlink, which is available through My NCBI –Recent Activity. Once you agree to Clear Recent Activity, the action *cannot* be undone. A popup message will confirm if you want to clear all items for Recent Activity.

Recent Activity 123



You can also clear Recent Activity from any NCBI database by clicking **Clear** in the Recent Activity box. Click Clear Recent Activity if you are sure you want to erase all items.



Sorting Recent Activity

There are two ways to Sort items: by date and by resource. To sort Recent Activity, start by clicking "See All Recent Activity"



Click the "Display Settings" drop down menu, select to sort by date or by resource.



When selecting to sort by date, the most recent searches will be listed first.

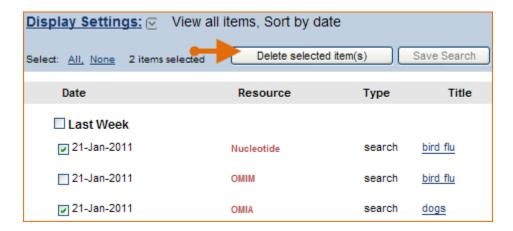
When selecting to sort by resource, the databases are arranged in alphabetical order.

Deleting Items in Recent Activity

In addition to deleting all items by clearing all records in Recent Activity, you may select individual items to be deleted from your Recent Activity.

To delete items from Recent Activity, start by clicking "See All Recent Activity." Select the items you wish to remove and click the "Delete selected item(s)" button. Note that this action *cannot* be undone.

Recent Activity 125



A message will notify you of the number of items removed from your Recent Activity.

Creating Saved Searches in Recent Activity

If you want to save a search from a past query, you can locate your query in Recent Activity and add it to your Saved Searches collection. This feature helps you save time as there is no need to reformulate a search and to rerun it again in a database.

Go to Recent Activity and click the link "See All Recent Activity." Select the items you would like to save, and click on the "Save Search" button.



Enter a name for your new saved search. The message "Search saved successfully" indicates that the search was added to your Saved Searches. A link is provided "Edit the saved search options," in case you would like to receive email updates for your new search.

Moving Recent Activity Records to Collections

Only Records may be moved to a Collection in My NCBI. Click the link "See All Recent Activity." Select the records you wish to incorporate into one of your Collections and click on the "Copy to Collection" button.



In the "Save Records" pop up window, select the Collection where you wish to move the item. Click Save.



A message "[number] entries moved to [collection name]" indicates the number of records moved to a collection and the collection name. The collection name is hyperlink in case you would like to edit your collections at that point.