

Client Center: [360 Core: Data Optimization Checklist for Discovery Services](#)

Use this checklist to help you optimize your library's Client Center settings. For detailed information about why and how to perform these tasks, click the heading at the beginning of each section.

1. Review Database and Title Selections		
√ Priority	Steps to Take	Services Affected
Critical	Subscribe to databases not yet added to your Client Center's Data Management Area.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
Critical	Remove canceled databases from Data Management or hide them from your Discovery Services.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
Critical	Choose special regional and consortium databases only if they are appropriate for your library.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
Critical	Verify title selection is accurate: Select individual titles if your subscription does not cover the whole database.	360 Core, 360 Link, 360 MARC Updates, Summon
Critical	Customize coverage dates for titles if your library subscribes to a date range other than the default date range.	360 Core, 360 Link, 360 MARC Updates, Summon
Recommended	Hide databases containing selected (incomplete) full-text.	360 Link, Summon
Optional	Add open-access resources to your holdings.	360 Core, 360 Link, 360 MARC Updates, Summon
Optional	Create Library Specific Holdings databases for non-electronic titles only.	360 Core, 360 Link, Summon
2. Update Database Details (HINT: Use the Database Details Report)		
√ Priority	Steps to Take	Services Affected
Critical	Check the corresponding "Display in" box for each service in which you want a database included.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
Critical	Add Custom URLs and identifiers to databases from providers that require special settings for authentication.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
Critical	Do not select the option to use database-level URL for all titles in the database.	360 Core, 360 Link, 360 MARC Updates
Recommended	Omit your proxy from resources that do not require authentication.	360 Core, 360 Link, 360 MARC Updates, Summon
Optional	Add Custom Database Names, Custom Database Descriptions, and Public Notes.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
3. Configure Library Settings and External Tools		
√ Priority	Steps to Take	Services Affected
Critical	Update your IP addresses in the Client Center.	360 Search, Summon, Optional for 360 Link
Critical	Configure your proxy service to allow access to your subscribed resources. Note: Index Enhanced Direct Linking may require special domains.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
Critical	Activate 360 Link with each content provider that you want to act as a referring source for your OpenURL link-resolver.	360 Link
Critical	Make sure the holdings in your link-resolver tool match your Client Center holdings.	Summon (for libraries with a link-resolver other than 360 Link)
4. Stay Informed and Get Help		
√ Priority	Steps to Take	Services Affected
Critical	Watch the Client Center for Knowledgebase Notifications regarding content changes that require action on your part.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
Recommended	Join the Summon and General Discussion listservs to share ideas and information about your Discovery Services.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
Recommended	On the System Status Page, subscribe to email alerts regarding scheduled maintenance and system availability issues.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon
Recommended	Open a case via the Knowledge Center to report problems and pose questions to the Ex Libris support team.	360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon