



Optimizing your Data for Discovery in Summon

Elizabeth Farrell, MLIS | Technical Product Specialist
Sharai Perkes, MLIS | Senior Training and Consulting Partner

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Introductions

- **Elizabeth Farrell, MLIS, Technical Product Specialist**

Elizabeth has been with ProQuest for over a year as a member of the SerialsSolutions/Workflow Solutions Support team. With a background in music librarianship and an MLIS from the University of Washington, Elizabeth enjoys working with libraries to make their data and collections discoverable and easily accessible. Elizabeth is a Pacific Northwest native and currently calls Seattle home.

A favorite walking spot: South Lake Union, Seattle

- **Sharai Perkes, MLIS, Sr. Training and Consulting Partner**

Sharai is a Global Education Team member who designs, develops and delivers training programs that enable library staff to master new products and technologies. She joined ProQuest in 2009 after completing her MLIS at the University of Washington iSchool. Prior to that, Sharai was a software developer for 11 years.

A favorite kayaking spot: Oleta River, North Miami

Objectives and Target Audience

- **Session Description:**
 - Summon relies on accurate holdings information and library settings in the Client Center / Intota. In this session, discover tips and tricks for fine tuning your holdings and keeping them up to date for your users. And, learn strategies for correcting common configuration errors that prevent users from linking to your content successfully.
- **Session Objective:**
 - By the end of this sessions you will be able to optimize your Client Center or Intota holdings and settings to create positive discovery and full-text linking experiences for your Summon users.
- **Session Target Audience:**
 - Technical Services Librarians with all levels of experience using Intota or the Client Center.

Agenda

1

Why Optimize Your Data?

2

Under the Hood

3

Data Optimization

4


Next Steps, Support Resources and Survey



Agenda

- **Why Optimize Your Data?**
- Under the Hood
- Data Optimization
- Next Steps, Support Resources, and Survey

Problem: E-Journal Portal Links to Database Homepage



Our Library


☒ All
 ☐ Journals Only
 ☐ Books Only
 English

[Show more search options](#)


Showing results 1 through 2 of 2
for the search: Title begins with "journal of applied behavior"

Note: Alternate titles may have matched your search terms.
Refine Results: [All](#) | [Journals Only](#) | [Books Only](#)

Limit by: [Peer Reviewed](#) | [Open Access](#)



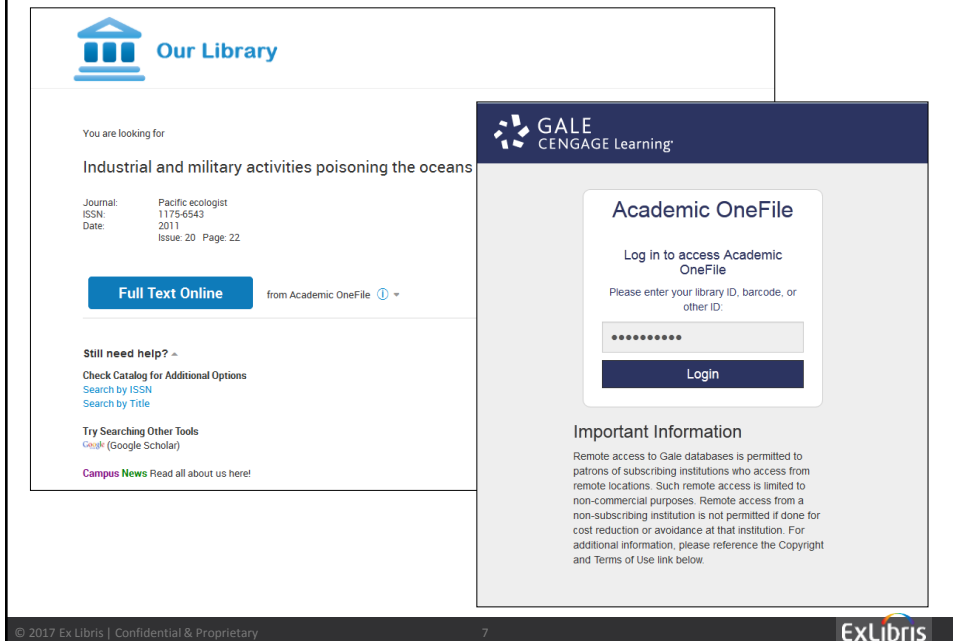
Journal of applied behavior analysis
ISSN: 0021-8855
Peer Reviewed
1968 to 2012 in PubMed Central
1997 to Present in Wiley-Blackwell Full Collection
12/01/2005 to 12/31/2015 in ABI/INFORM Collection
[ProQuest Central](#)
2011 to Present in [IngentaConnect](#)



The Journal of applied behavioral science
ISSN: 0021-8863
Peer Reviewed
1991 to 2013 in [IngentaConnect](#)
09/01/1995 to 12/31/2007 in [ABI/INFORM Collection](#)
[ProQuest Central](#)

Links should go to journals, not to database home pages.

Problem: Users Prompted for Second Authentication



Our Library

You are looking for

Industrial and military activities poisoning the oceans

Journal: Pacific ecologist
ISSN: 1175-6543
Date: 2011
Issue: 20 Page: 22

Full Text Online from Academic OneFile ⓘ

Still need help?

Check Catalog for Additional Options
[Search by ISSN](#)
[Search by Title](#)

Try Searching Other Tools
[Google](#) (Google Scholar)

Campus News Read all about us here!

GALE CENGAGE Learning

Academic OneFile

Log in to access Academic OneFile

Please enter your library ID, barcode, or other ID:

.....

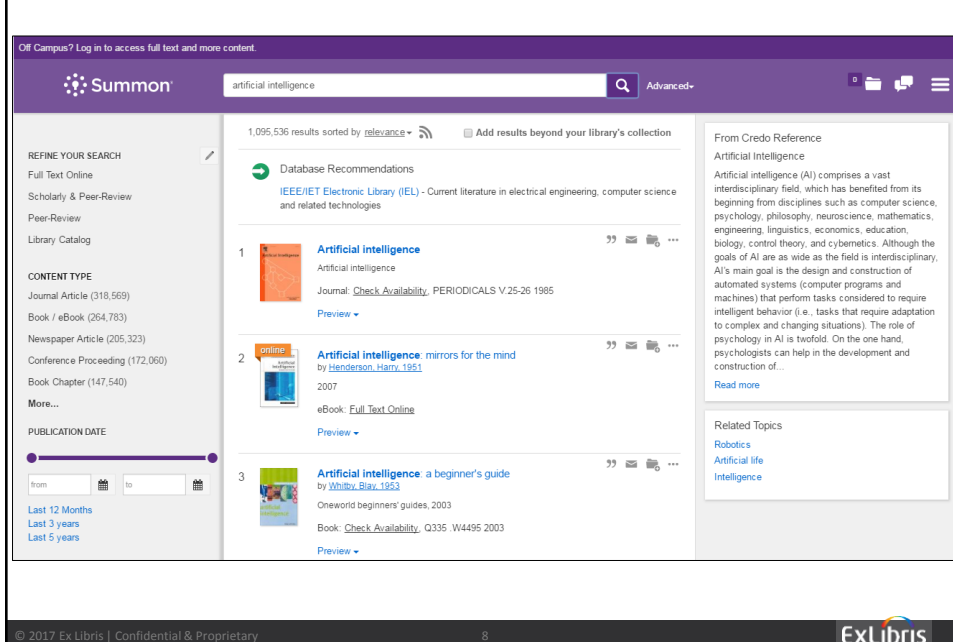
Login

Important Information

Remote access to Gale databases is permitted to patrons of subscribing institutions who access from remote locations. Such remote access is limited to non-commercial purposes. Remote access from a non-subscribing institution is not permitted if done for cost reduction or avoidance at that institution. For additional information, please reference the Copyright and Terms of Use link below.

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Problem: Summon Displays Unsubscribed Resources



Off Campus? Log in to access full text and more content.

Summon artificial intelligence **Advanced**

1,095,536 results sorted by **relevance** ⓘ Add results beyond your library's collection

Database Recommendations

IEEE/ET Electronic Library (IEL) - Current literature in electrical engineering, computer science and related technologies

1 Artificial Intelligence
Artificial intelligence
Journal: [Check Availability](#) PERIODICALS V.25-26 1985
[Preview](#)

2 Artificial intelligence: mirrors for the mind
by [Henderson, Henry](#) 1991
2007
eBook: [Full Text Online](#)
[Preview](#)

3 Artificial intelligence: a beginner's guide
by [Whitby, Blay](#) 1993
Oneworld beginners' guides, 2003
Book: [Check Availability](#) Q335 .W4495 2003
[Preview](#)

REFINE YOUR SEARCH

Full Text Online
Scholarly & Peer-Review
Peer-Review
Library Catalog

CONTENT TYPE

Journal Article (318,569)
Book / eBook (264,783)
Newspaper Article (205,323)
Conference Proceeding (172,060)
Book Chapter (147,540)
More...

PUBLICATION DATE

from to

Last 12 Months
Last 3 years
Last 5 years

From Credo Reference

Artificial Intelligence

Artificial intelligence (AI) comprises a vast interdisciplinary field, which has benefited from its beginning from disciplines such as computer science, psychology, philosophy, neuroscience, mathematics, engineering, linguistics, economics, education, biology, control theory, and cybernetics. Although the goals of AI are as wide as the field is interdisciplinary, AI's main goal is the design and construction of automated systems (computer programs and machines) that perform tasks considered to require intelligent behavior (i.e., tasks that require adaptation to complex and changing situations). The role of psychology in AI is twofold. On the one hand, psychologists can help in the development and construction of...

[Read more](#)

Related Topics

[Robotics](#)
[Artificial life](#)
[Intelligence](#)

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Learn How Fix These Problems and More

SerialsSolutions 1-866-SERIALS (737-4257) Your Account **Support Center & Online Community** | Contact Us | Log Out

e-Catalog: All Titles Title Begins With

Home

News More...

Webinars More...

In Person More...

Products

Management

- 360 Consortium Edition
- 360 Core
- 360 Counter
- 360 Resource Manager
- Unichweb
- Intota Assessment

Discovery

- 360 Access Control
- 360 Link
- 360 MARC Updates
- 360 Search
- Summon

Manage Your Data

Management Tools

- Data Summary
- Collections
- Menus
- Alerts
- Contacts
- Data Management
- Indexes
- Notes
- Cost Data Upload
- Vendor Statistics Metadata

Business Intelligence Tools

- 360 Usage Statistics
- Overlap Analysis
- Data On Demand
- Management Reports
- 360 Counter

Administer Your Products

360 Core

- View E-Journal Portal
- Administration Console
- OCLC eSerials Holdings Service

360 Access Control

- Administration Console

360 Link

- Administration Console
- Google Scholar Setup

360 Search

- Administration Console
- View 360 Search

Summon

- Administration Console

Manage Your Library

- Client Center Accounts
- Library Settings
- View Changes
- View Member Libraries

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Learn How to Fix These Problems and More

Intota *ProQuest Training University Library (747) | Sharal Perkes

Home **Resources** Tools Reports **Admin** Databases Begins With Specify name, identifier, keyword, or L

RESOURCE SUMMARY

- Providers (49)
- Databases (115)
- Holdings (375772)
 - Ebooks (280786)
 - Ejournals (94986)
- Collections (1)

QUICK LINKS

- Alerts
- Contacts
- Licenses
- Notes
- Knowledgebase Notifications (New! 01/23/2015)

MY INTOTA View All

- Upcoming Renewals
 - There are no upcoming resources renewals.
- License Expirations
 - There are no upcoming license expirations.
- Upload Status
 - There are no recent uploads.
- Automated Holdings Updates
 - There are no recent automated holdings updates.
- Databases
 - Manage Your Databases

ASSESSMENT

- Intota Assessment
- Overlap Analysis

ADMINISTRATIVE

- Menu Settings
- Management Reports
- Vendor Statistics Management
- E-Journal Portal Admin Console
- Cost Data Upload
- 360 Link Admin Console
- Summon Admin Console

HELPFUL RESOURCES

- Upcoming Webinars
- Contact Us

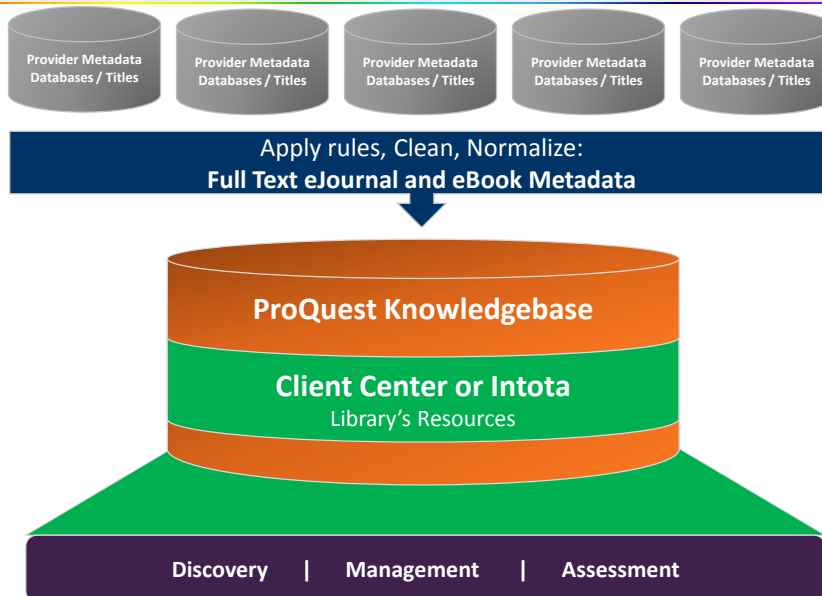
ProQuest® Intota Copyright | Contact Us | Privacy Policy | Support

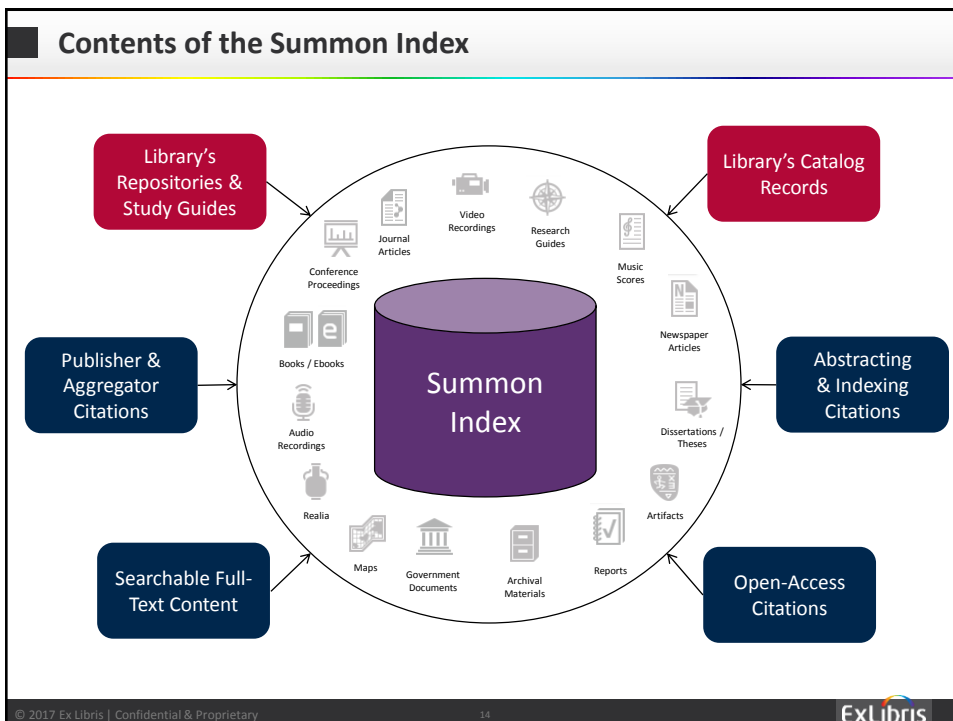
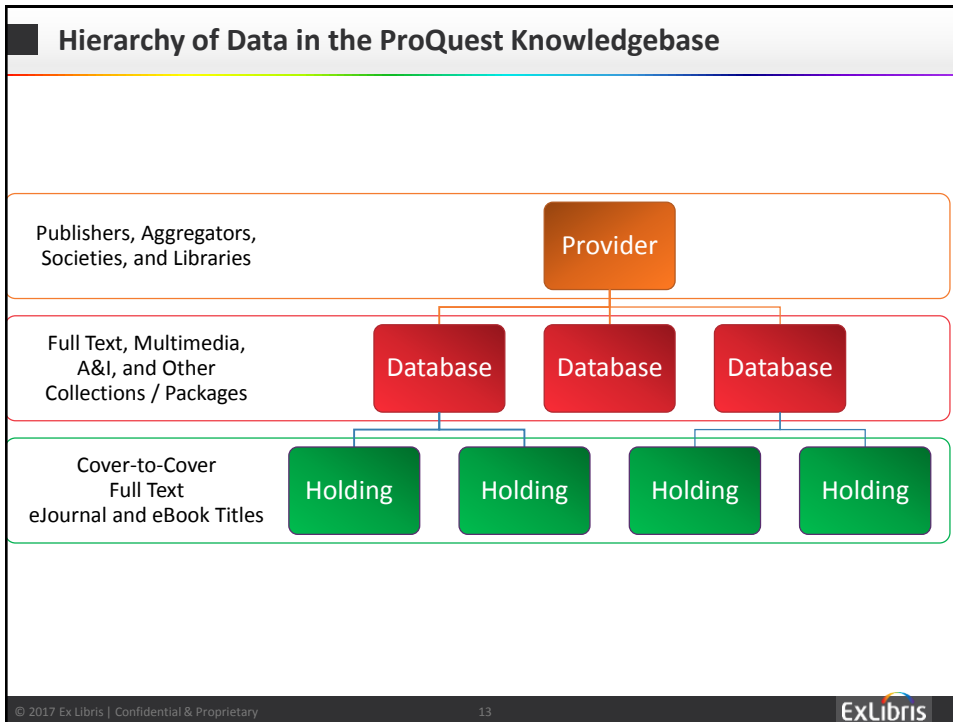


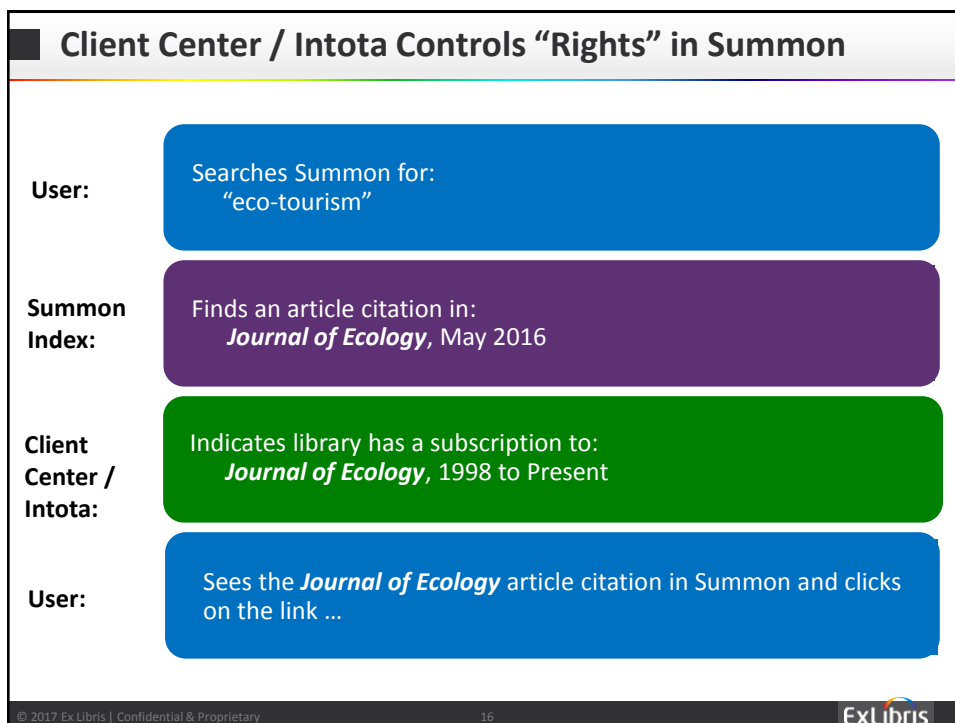
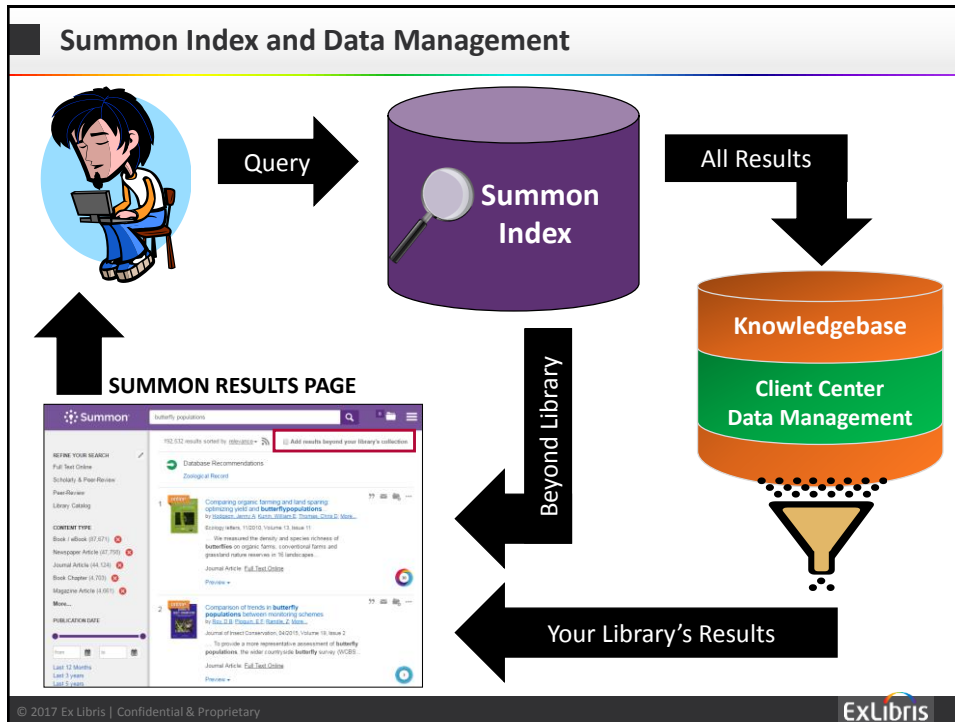
Agenda

- Why Optimize Your Data?
- **Under the Hood**
- Data Optimization
- Next Steps, Support Resources, and Survey

What is the ProQuest Knowledgebase?







Summon Uses Index Enhanced Direct Linking (IEDL)

Summon Direct Linking

Full-Text Article

The screenshot shows the Summon search results page for the query 'bird migration'. On the left, there are filters for 'REFINE YOUR SEARCH' (Full Text Online, Scholarly & Peer-Review, Peer Review, Library Catalog), 'CONTENT TYPE' (Journal Article (3,788), Book Review (130), Newspaper Article (27), Magazine Article (5), Trade Publication Article (5)), and 'PUBLICATION DATE' (4/10/18, 4/10/17, Clear, Last 12 Months, Last 3 years, Last 5 years). The main results list shows two items: 1. 'Changes in bird migration patterns associated with human-induced mortality' by Elizabeth Carlson, et al., in *Conservation Biology*, 2020, 31, Issue 1. 2. 'Wind tunnel as a tool in bird migration research' by Hedenstrom, Anders, in *Journal of Avian Biology*, 2017, Volume 48, Issue 1. The right pane shows the full-text article for the second result, 'Wind tunnel as a tool in bird migration research', including the abstract and full text.

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17

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If a direct link is not available: Summon Uses OpenURL in 360 Link

Summon

360 Link Engine

Full-Text Article

The diagram illustrates the 360 Link process. On the left, a Summon search result for 'On Hegel, History, and Reading as if for Life: Response' by Cornelius Nicholas is shown. In the center, a large green circle contains the number '360' and the word 'Link'. On the right, a screenshot of the 360 Link Engine interface shows the search results and the full-text article for the same title. The 360 Link Engine interface includes a search bar, filters, and a list of results. The full-text article is displayed on the right side of the 360 Link Engine interface.

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18

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Agenda

- Why Optimize Your Data?
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Data Optimization Checklist

- Use the Data Optimization Checklist for [360 Core](#) or [Intota](#) to ensure you have set-up your Data Management and Library Settings to their full potential:

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 consortium and regional databases only if they 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



Agenda

- Why Optimize Your Data?
- Under the Hood
- **Data Optimization**
 - **Review Database and Title Selections**
 - Update Database Details
 - Configure Library Settings and External Tools
 - Stay Informed and Get Help
- Next Steps, Support Resources, and Survey

CRITICAL: Add Your Subscription Databases

- Add your full-text eJournal and eBook databases:

Ebrary Academic Complete Subscription Collection	IVK	Subscribed	89511	Ebrary
Credo Reference All Titles	4--	Subscribed	3080	Credo Reference
BioMedCentral	BMC	Subscribed	63 of 349	BioMedCentral

Advances in Chemistry Series	Database	254 titles
Subscribed - American Chemical Society		
African Newsstand	Database	45 titles
Subscribed - ProQuest		

- Add your “[zero-title](#)” databases for Summon

Naxos Music Library Jazz	CUA	Subscribed	0	Naxos International (Far East)
Naxos Spoken Word Library	429	Subscribed	0	Naxos International (Far East)
Naxos Video Library	42A	Subscribed	0	Naxos International (Far East)

ARTstor	Database	0 titles
Subscribed - ARTstor		

- [Abstracting and indexing \(A & I\)](#)
- [Library catalog, repositories, and research guides](#)
- Special content types (videos, audio, images, etc.)
- ProQuest Dissertations (can be made to work with 360 Link, too)

Catalog Records vs ERM for E-resources? Why not both!

1. Upload catalog records for your e-books and e-journals:
 - Ensure title-level discovery of your holdings, even if the content is not yet indexed in Summon.
 - Contribute your cataloging efforts – such as subject headings – to the Summon Index.
2. Add e-journal and e-book databases to Client Center/Intota to:
 - Enable article and chapter-level discovery in Summon.
 - Make e-resources available via 360 Link from all referring sources.
 - Allow e-resources to be discovered in your E-Journal Portal.

online
Analyzing the economics of financial market infrastructures
by Diehl, Martin; Alexandrova-Kabadjova, Biliana; Heuver, Richard; More...
2016
The prosperity and stability of any economic structure is reliant upon a foundation of secure systems that regulate the movement of money across the globe....
eBook: [Full Text Online](#)
eBook: [Full Text Online](#)
Preview ▾

Access based on catalog record

Access based on ERM holding

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23

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CRITICAL: Remove Cancelled Databases from Discovery

- Set the databases to “Not Tracked” to completely remove it from Intota/Client Center and all Discovery services:

Provider: American Academy of Pediatrics
Titles: 13
Status: Not Tracked
Status: Not Tracked

- Or, set Status as needed *and* turn off Discovery Services:

Status: Cancelled
Display In:
☐ 360 Core
☐ 360 Link
☐ 360 MARC Updates
☐ Summon
Discovery:
360 Core Off
360 Link Off
360 MARC Updates Off
Summon Off

- Replace outdated databases with new ones:

ABI/INFORM Global
ABI/INFORM Global (PDF only) (Legacy Platform)
ABI/INFORM Trade & Industry
ProQuest Sociology
ProQuest - M2S
ProQuest Sociology (Legacy Platform)
ProQuest - PQA

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24

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CRITICAL: Choose Correct Regional and Consortium Databases

- Choose databases designed for your region if available:

- Examples:

- African Writers Series - International Clients
African Writers Series
- HathiTrust (Global Public Domain only)
HathiTrust (Public Domain within US only)



- Choose databases designed for your consortium
- Do not choose databases meant for other consortia
- Examples:

- Oxford Journals – SCEL
- Emerald – SURFmarket
- Elsevier – ICM



CRITICAL: Verify Title Selection

- Whenever possible, select the whole database:

Database Name	Code	Status	Titles	Provider
ABI/INFORM Complete	7WY	Subscribed	6337	ProQuest

☐ ProQuest Central
☒ Subscribed - ProQuest - BENPR

☒ Database
 19754 of 19754 titles

- When appropriate, select individual titles:

BioMedCentral	BMC	Subscribed	63 of 349	BioMedCentral
---------------	-----	------------	-----------	---------------

☐ Wiley-Blackwell Journals (Frontfile Content)
☒ Subscribed - Wiley-Blackwell - 10C

☒ Database
 146 of 2049 titles

- Use the right tool for the job:
 - Hand-pick titles if you have just a few to select.
 - Upload your title list to [Intota](#) or the [Client Center](#) using the Offline Date and Status Editor (a.k.a., ODSE)



Use Excel's VLOOKUP function to match your vendor's title list to the title list in our database to simplify upload.

CRITICAL: Verify Title Selection (continued)

- If a database is “selectable” but you really subscribe to the whole database:

Titles 22 of 100

Add All Titles **Add All Titles** **Remove All Titles** **Remove All Titles**

Status Subscribed

Display In: ☒ 360 Core
☒ 360 Link
☒ 360 MARC Updates
☒ Summon

Reset Title Display In Settings [Reset ?](#)

to Database Default

Default URL <http://accessmedicine.mhmedical.com/>

Custom URL

☐ Use database-level (custom or default) URL only for all titles in this database

Library Proxy ☐ Omit proxy from this database

Title Coverage ☒ We subscribe to only some of the titles in this database

Do NOT click the Add All Titles link.

DO uncheck the Title Coverage box.

- Don't let this happen to you:

North American Indian Drama	NAD	Subscribed	174 of 177	Alexander Street Press
ASME Transactions Journals (Current)	RAI	Subscribed	25 of 26	American Society of Mechanical Engineers

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27

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CRITICAL: Verify Title Selection (continued)

About

Business Source Corporate Plus
 Subscribed - EBSCOhost - TH9

Database Name Business Source Corporate Plus

Provider Name EBSCOhost

Status Subscribed

Title Coverage ONLY SELECTED titles (24184 of 24189) [Manage Titles](#)

Avoid this!

Database 24184 of 24189 titles

Edit

About

* Required Field

Database Name * Business Source Corporate Plus

Provider Name EBSCOhost

Collection

Status Subscribed

Title Coverage ONLY SELECTED titles **ALL titles**

Database Description

Long Database Description

Cancel Save

Choose the ALL titles option instead of ONLY SELECTED titles.

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28

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CRITICAL: Verify Title Selection (some additional tips)

- Sign up for Automated Holdings Management for the [Client Center](#) or [Intota](#) if you have a direct purchase or PDA/DDA triggered purchase program with:

- EBL:** Ebook Library (AZZ)
- ebrary:** ebrary Perpetual Access, PDA, and STL (JJU)
- ProQuest Ebooks:** Ebook Central Perpetual and DDA (AABBV)

Automated Holdings Updates	
04/06/2017	Ebook Library
04/06/2017	ebrary Perpetual Access, PDA and STL
04/07/2017	Ebook Central Perpetual and DDA
Databases	
Manage Your Databases	

Automatic Holdings Update	
Ebook Library New!04/06/2017	Ebook Central Perpetual and DDA New!04/07/2017
ebrary Perpetual Access, PDA and STL New!04/06/2017	
Administer Your Products	
360 Core	

CRITICAL: Verify Title Selection (some additional tips)

- When selecting individual title subscriptions, avoid the **Single Journals** database from the "Provider" called **Multiple Vendors**.

Scopus	BKL	Subscribed	0	Elsevier
Single Journals	SJN	Subscribed	2 of 4803	Multiple Vendors
SORA - Searchable Ornithological	ESB	Subscribed	23	University of New M

Database	26 of 4834 titles
Single Journals	
Subscribed - Multiple Vendors	

- Instead, choose real provider databases to improve linking reliability.

CRITICAL: Customize Coverage Dates

- Customize coverage dates **only** if your library subscribes to a date range other than the default.

Title	ISSN/ISBN	Type	Status	Date(s)	Custom Date(s)
ACC Current Journal Review	1062-1458	Journal	Subscribed	01/01/1995 - 12/31/2005	01/01/2003 to 12/31/2010
Accident Analysis & Prevention	0001-4575	Journal	Subscribed	07/01/1969	01/01/2003 to 6 months ago
Accident and Emergency Nursing	0965-2302	Journal	Subscribed	01/01/1993 - 10/31/2007	5 years ago to Present

Holding Details

Database Name

ScienceDirect Journals

Provider Name

Elsevier

Collection

-- Select --

Status

Subscribed

Coverage Dates

from

01/01/2009

to

3 months ago

Cancel

Save

CRITICAL: Customize Coverage Dates

- Use [valid date formats](#) when entering dates:
 - Fixed dates (such as **01/01/2003 – 12/13/2016**)
 - Relative dates (such as **5 years ago - Present**)
- Use the right tool for the job:
 - Hand-enter date ranges for just a few journals.
 - Use the Offline Date and Status Editor (ODSE) for many journals needing custom date ranges.
 - Set date range for all journals in database.

RECOMMENDED: Hide Partial-Coverage Databases

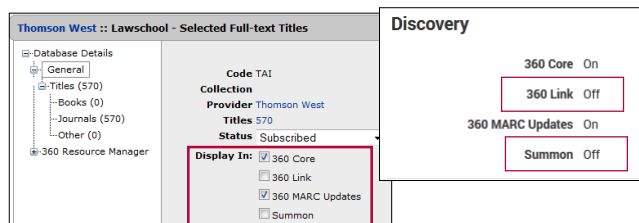
- Certain databases contain [journals with partial content](#) coverage; some articles are missing.
- Avoid broken article links by hiding these databases from **Summon** and **360 Link** – instead only display in the **E-Journal Portal (360 Core)** and **360 MARC Updates**, which link at the journal level.

Examples :

Lawschool - Selected Full-text Titles

Factiva (Selected Full Text)

LexisNexis Academic (Selected Full Text only)



OPTIONAL: Add Open-Access Databases

Which databases tracked by ProQuest are free e-resources?

ProQuest tracks many databases that contain journals and books that are free for any library to use. Your patrons can access these databases by adding them to your library's Client Center or Infotia profile.

However, we are aware that there are some databases we track that have free journals but are not on this list (spreadsheet). The problem is we have no way of confirming whether databases have free journals, that information is not provided to us directly from vendors. We have no automated way to generate and maintain this list.

Therefore, we must rely on you, our clients, to help us maintain this list.

If you know a database tracked by ProQuest has free journals but isn't on this list, let us know (use the top of this page, and select Category: Support Center).

Journals in a database on this list aren't free, again, let us know. We can't distinguish between free and subscription-only journals in the monthly report submitted from our user community.

A database that has free journals but ProQuest does not track it, please follow the link to the database as often as warranted, but probably not more than once a month. Please subscribe to the database to receive an e-mail message each time it's updated.

Download a list of open-access databases.



See article: [Databases of Free E-journals, E-books, Images, and More](#)

Databases of Free Journals Tracked by ProQuest

List of Free Resources Tracked by ProQuest (spreadsheet updated March 22, 2017)

NOTE: Databases marked as **zero-title databases** are only available to libraries that subscribe to 360 Counter, 360 Resource Manager, 360 Search, or the Summon® service.

TIP: If you use a proxy URL, select the **Omit Proxy from this Database** check box when you subscribe to these resources. It's not necessary to apply the settings as described in the Library Proxy section of the Database Details Page (for more information: Client Center users go here, Infotia users go here).

OPTIONAL: Create Custom Databases

- Include your library's print and microform journal collections in Intota or the Client Center with your own Library Specific Holdings database.

Home > Data Management

Library Databases

Create New Database Edit Status Show All

Go To Page: 1 / 4

Database Name	Code	Status	Titles	Provider
Aardvark-Zebra Training Library Print Holdings	D-I	Subscribed	1335	Library Specific Holdings
ABI/INFORM Complete	2M	Subscribed	6242	ProQuest
Academic ASAP				

Code ABWQL

Collection

Provider Library Specific Holdings

Titles 95

Status Subscribed

Format Print

Display In: ☒ 360 Core ☒ 360 Link ☐ 360 MARC Updates ☒ Summon

Default URL http://proquest.com

Library Proxy ☒ Omit proxy from this database

Title Coverage ☐ We subscribe to only some of the titles in this database

Default Database Name University Library's Print Holdings

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35

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OPTIONAL: Create Custom Databases

- Remember to indicate the correct format, and omit your proxy if appropriate

REFINE YOUR SEARCH 113 results sorted alphabetically.

Status Any Status

☒ Subscribed

Create New Database

Add Custom Database * Required Field

Database Name * ProQuest Training University Microform Journals

Provider Name Library Specific Holdings

Format Microform

Status * Subscribed

Title Coverage ONLY SELECTED titles ALL titles

URL

Library Proxy



If you already have any **Library Specific Holdings** databases, check their settings.

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36

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- Why Optimize Your Data?
- Under the Hood
- **Data Optimization**
 - Review Database and Title Selections
 - **Update Database Details**
 - Configure Library Settings and External Tools
 - Stay Informed and Get Help
- Next Steps, Support Resources, and Survey

Run a Database Details Report

- Report includes **Database Details** for each of your databases.

Intota

Home | Resources | Tools | Reports | Admin

Databases ▾ Be

Management Reports

Counter Summary

Knowledgebase Notifications

Select Report Database Details Report ▾

Request Report

Home > Management Reports

Management Reports

Select Report: Database Details Report ▾ Report Name Database Details Rep Request Report

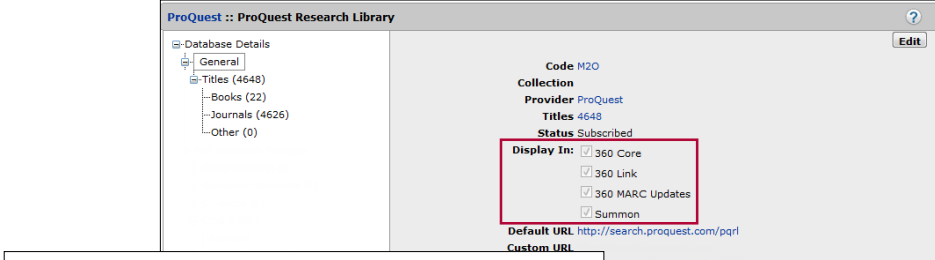
- Review your settings without opening each database individually.

Database Code	Default Database Name	Provider	Total number of Titles	Status	Display in 360 Core	Display in 360 Link	Display in Summon
D-I	Aardvark-Zebra Training Library Print Holdings	Library Specific Holdings	1335	Subscribed	Yes	Yes	Yes
7WY	ABI/INFORM Complete	ProQuest	6420	Subscribed	Yes	Yes	Yes
IAA	Academic ASAP	Gale	643	Under Review	Yes	Yes	Yes
EXP	Academic ASAP Premier	EBSCOhost	6088	Subscribed	Yes	Yes	Yes
	ACM Digital Library	ACM Digital Library	7056	Subscribed	Yes	Yes	Yes
	Chemistry Series	American Chemical Society	254	Subscribed	Yes	Yes	Yes
	ProQuest	ProQuest	45	Subscribed	Yes	Yes	Yes
	EBSCOhost	EBSCOhost	0	Subscribed	Yes	Yes	Yes
WCW	American Civil War Research	Alexander Street Press	0	Subscribed	Yes	Yes	Yes



Some columns are hidden in this example.

CRITICAL: "Display In" Desired Discovery Services



ProQuest :: ProQuest Research Library

Database Details

- General
- Titles (4648)
 - Books (22)
 - Journals (4626)
 - Other (0)

Code M2O
Collection
Provider ProQuest
Titles 4648
Status Subscribed

Display In:

- ☒ 360 Core
- ☒ 360 Link
- ☒ 360 MARC Updates
- ☒ Summon

Default URL <http://search.proquest.com/pqrl>
Custom URL

About

Database Name Credo General Reference
Provider Name Credo Reference
Status Subscribed
Title Coverage ALL titles
Database Description Presenting millions of entries and thousands of topic pages from the world's best reference titles, all cross-referenced for searching ease and excellence

Discovery

360 Core	On
360 Link	On
360 MARC Updates	On
Summon	On

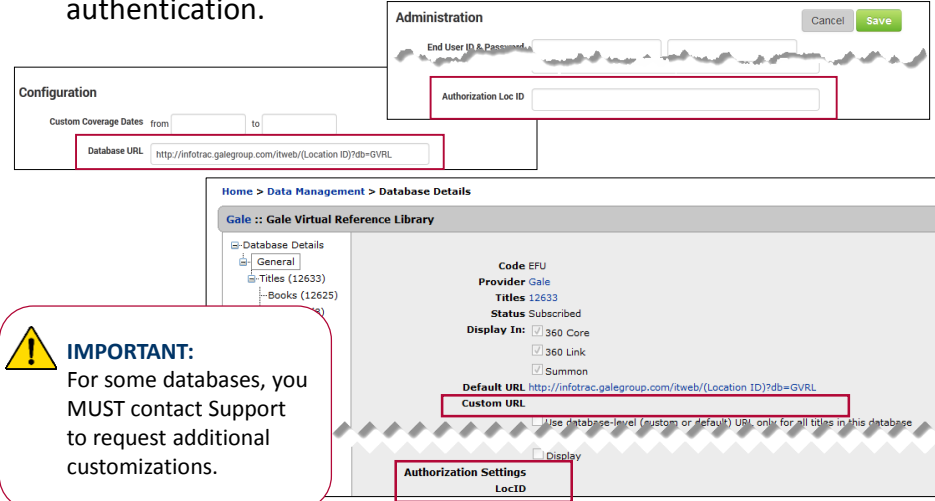
For more information:

- [Client Center: Resource Status vs. Visibility](#)
- [Intota: Resource Status vs. Visibility](#)

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CRITICAL: Add Institution Identifiers

- Some providers require custom URLs and other special Database Details settings in [Client Center](#) and [Intota](#) for authentication.



Administration

End User ID & Password

Authorization Loc ID

Configuration

Custom Coverage Dates from to

Database URL [http://infotrac.galegroup.com/itweb/\(Location ID\)?db=GVRIL](http://infotrac.galegroup.com/itweb/(Location ID)?db=GVRIL)

Home > Data Management > Database Details

Gale :: Gale Virtual Reference Library

Database Details

- General
- Titles (12633)
 - Books (12625)

Code EFU
Provider Gale
Titles 12633
Status Subscribed

Display In:

- ☒ 360 Core
- ☒ 360 Link
- ☒ Summon

Default URL [http://infotrac.galegroup.com/itweb/\(Location ID\)?db=GVRIL](http://infotrac.galegroup.com/itweb/(Location ID)?db=GVRIL)
Custom URL

Use database-level (custom or default) URL only for all titles in this database

Authorization Settings

LocID

IMPORTANT:
For some databases, you MUST contact Support to request additional customizations.

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CRITICAL: Do Not Use Database-Level URL for Titles

Configuration

Custom Coverage Dates from to

Database URL

Library Proxy ☒ On ☐ Off

Use database level URLs for all titles in this database ☒ On ☐ Off

Public Database Note

Public All Titles Note

On ☐ Display this note

Code M20

Collection

Provider ProQuest

Titles 4648

Status Subscribed

Display In: ☒ 360 Core ☒ 360 Link ☒ 360 MARC Updates ☒ Summon

Default URL

Custom URL

☐ Use database-level (custom or default) URL only for all titles in this database

Library Proxy ☐ Omit proxy from this database

Title Coverage ☐ We subscribe to only some of the titles in this database

- Do not **Use database-level URL** ... unless your library uses Dynix RPA for remote authentication.
- If your title-level URLs are failing, contact Support for assistance.

RECOMMENDED: Omit Proxy When Not Needed

- If you entered a proxy URL in Library Settings, it will automatically apply to all of your resources.
- Turn off the proxy where it is not needed, for example:
 - Your library catalog, study guides, and institutional repositories
 - Open-access databases

Configuration

Custom Coverage Dates from to

Database URL

Library Proxy ☒ On ☐ Off

Use database level URLs for all titles in this database ☒ On ☐ Off

Public Database Note

Public All Titles Note

On ☐ Display this note

Code M20

Collection

Provider ProQuest

Titles 4648

Status Subscribed

Display In: ☒ 360 Core ☒ 360 Link ☒ 360 MARC Updates ☒ Summon

Default URL

Custom URL

☐ Use database-level (custom or default) URL only for all titles in this database

Library Proxy ☐ Omit proxy from this database

Title Coverage ☐ We subscribe to only some of the titles in this database

OPTIONAL: Add Custom Database Names and Descriptions

Default Database Name ProQuest Research Library

Custom Database Name

Custom Database Description

Long Database Description

Serials Solutions Description

Custom Coverage Date From

Custom Coverage Date To

Public Database Note ☐ Display

Public All Titles Note ☐ Display

Titles (6547 tracked of 6547) [View All](#)

About * Required Field Cancel Save

Database Name * ABU/INFORM Complete

Provider Name ProQuest

Collection

Status Subscribed

Title Coverage ONLY SELECTED TITLES **ALL TITLES**

Database Description In-depth coverage of business issues, management techniques, competitive information, and a variety of other topics

Summon example:



Agenda

- Why Optimize Your Data?
- Under the Hood
- **Data Optimization**
 - Review Database and Title Selections
 - Update Database Details
 - **Configure Library Settings and External Tools**
 - Stay Informed and Get Help
- Next Steps, Support Resources, and Survey

CRITICAL: Update IP Addresses

Home > Library Settings

Library/Institutional IPs

IP Address
11.11.11.11 - 22.22.22.22
33.33.33.33 - 44.44.44.44

Library Settings

- Library Info
- Library URLs
- Library/Institutional IPs**
- Other Settings
- Serials Solutions Permissions

IP Addresses

165.193.81.224 - 165.193.81.239 ✕


205.217.165.64 - 205.217.165.127 ✕

Add IP Enter a single IP or an IP range +

Use a dash to enter a range, example XXX.XX.XX.0 - XXX.XX.XX.255

Cancel Save

- **Summon: Critical**
 - Authentication banner
 - A & I resources
 - Special subscription content
 - See: [Summon: Authentication Banner for Remote Users](#)
- **360 Link: Optional**
 - Google Scholar integration [Full-Text @ My Library](#)
 - See: [360 Link: Google Scholar Setup](#)




Make sure your content providers have your current IP addresses too!

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CRITICAL: Configure Your Proxy Service

Do you use a proxy server to provide remote access to e-resources?

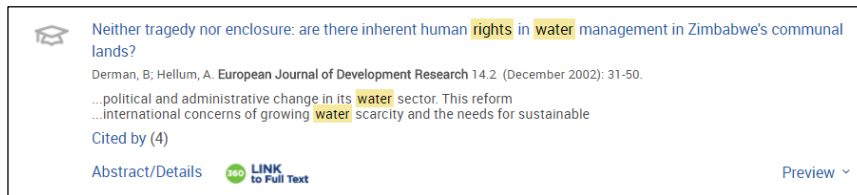
- Avoid linking errors by keeping your proxy configurations up to date:
 - Make sure your proxy configurations include all of your content providers' domains.
 - Add special domains for Summon and 360 Link resources that support Index Enhanced Direct Linking.
See: [Index-Enhanced Direct Linking to Provider Content](#).
- Add Summon to your proxy configurations. See: [Summon: Web-Based Proxy Support](#)



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CRITICAL: Configure 360 Link Referring Sources

- Activate 360 Link with content providers for the e-resources in which you want to see links to 360 Link:




Neither tragedy nor enclosure: are there inherent human rights in water management in Zimbabwe's communal lands?

Derman, B; Hellum, A. *European Journal of Development Research* 14.2. (December 2002): 31-50.

...political and administrative change in its water sector. This reform
...international concerns of growing water scarcity and the needs for sustainable

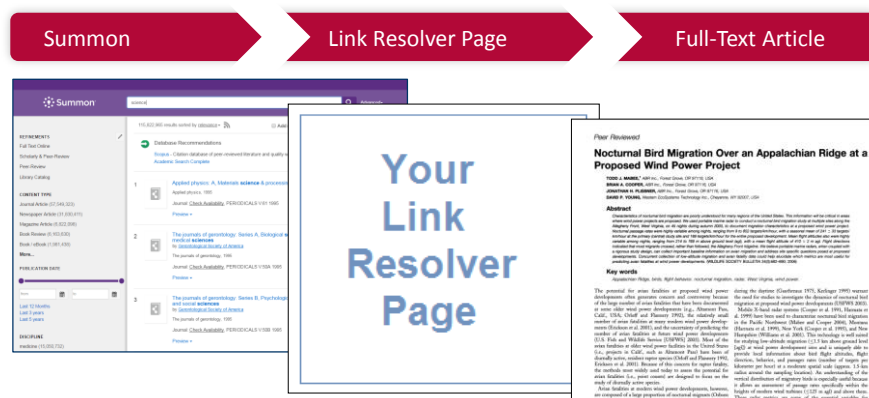
Cited by (4)

Abstract/Details  [LINK to Full Text](#) [Preview](#)

- See the [360 Link Referring Source Setup Guide](#) in the Support Center for provider-specific instructions on how to configure 360 Link in most e-resources.

CRITICAL: Match Holdings in Your Link-Resolver

- For Summon clients who use an OpenURL link resolver other than 360 Link:
 - Synchronize your link-resolver to match your Client Center holdings to prevent linking errors.



Summon → Link Resolver Page → Full-Text Article

Your Link Resolver Page

Nocturnal Bird Migration Over an Appalachian Ridge at a Proposed Wind Power Project

Ward, J. M.; et al. *Journal of Great Lakes Research* 39(1): 1-10, 2013.

Abstract

Nocturnal bird migration over a proposed wind power project in the Appalachian Ridge region of the Great Lakes was studied using radar and acoustic telemetry. The study area was located in the Appalachian Ridge region of the Great Lakes, specifically in the area of the proposed wind power project. The study was conducted in the fall of 2011 and the results were published in the *Journal of Great Lakes Research* in 2013.

Key words

nocturnal bird migration, wind power project, Appalachian Ridge, Great Lakes, radar, acoustic telemetry.



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CRITICAL: Check Knowledgebase Notifications

Manage Your Data

Management Tools

- Data Summary
- Data Management

Business Intelligence Tools

Knowledgebase Notifications New! 10/29/2013

Home > Knowledgebase Notifications

Active Notifications Edit ?

All Titles Removed from Database

You have no notifications in this category

Database and Platform Migrations

You have no notifications in this category

Database and Provider Name Changes

Provider Name	Database Name	Summary	Effective Date	Complete	Notes
Ebrary	Ebrary Perpetual Access Collection (JJU)	Ebrary Perpetual Access Collection from ebrary: Database Name Change -- Dec. 2013	2013-12-17	<input type="checkbox"/>	

Other Notifications and Content Changes

Provider Name	Database Name	Summary	Effective Date	Complete	Notes
ACM Digital Library	Multiple	Knovel Databases: Title-Level URL Domain Change -- October 2013	2013-11-22	<input type="checkbox"/>	

Green label shows there are new content changes relevant to your collection.

Click for information and instructions.

Add notes and keep track of your workflow.

CRITICAL: Check Knowledgebase Notifications

Knowledgebase Notifications

Click for information and instructions.

Effective	Notification	Provider Name	Database Name	Summary	Notes	Done
05/02/2014	Title-Level URL Changes	Therapeutic Guidelines Limited	eTG Complete	eTG Complete from Therapeutic Guidelines Limited: Title-Level URL Domain Change - May 2014		<input checked="" type="checkbox"/>
05/06/2014	Other Notifications and Content Changes	EBrary	EBrary Perpetual Access, POA and STL	Titles Missing from EBrary Perpetual Access, POA and STL Database - May 2014		<input checked="" type="checkbox"/>
05/23/2014	All Titles Removed from Database	MetaPress	Bellwether Publishing, Ltd.	Bellwether Publishing, Ltd. Database from Provider MetaPress: Titles Will Be Removed	05/26/2014 - Selected new Taylor & Francis database	<input checked="" type="checkbox"/>
06/13/2014	Title-Level URL Changes				06/17/2014 - Asked IT to update proxy. 06/19/2014 - Done.	<input checked="" type="checkbox"/>
06/25/2014	Other Notifications and Content Changes	ProQuest	Multiple	Summon: ProQuest Dissertations and Theses Databases Update		<input type="checkbox"/>

Add notes and keep track of your work.

Quick Links: Alerts, Contacts, Licenses, Notes, Knowledgebase Notifications (New! 01/23/2015)

Automated Holdings Updates: There are no recent automated holdings updates.

Databases: Manage Your Databases

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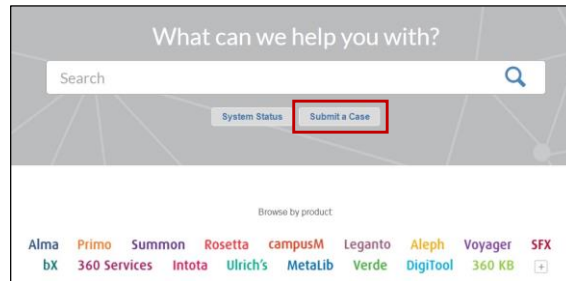
RECOMMENDED: Check Release and Service Announcements

- For older KB changes, see: [Summary of Provider and Database Changes](#)
- For product updates and release notes, see: [Release and Service Announcements for 360 Services, Intota, 360 KB, Summon, and Ulrich's](#)
- For real-time status monitoring of 360 Link and Summon, check <http://status.exlibrisgroup.com> and register to receive email alerts for scheduled maintenance or unplanned downtime.
- Join the conversation! Listservs for Summon, Intota, and other 360 Services are a great place for libraries to get help and share information. Sign-up instructions available [here](#).

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RECOMMENDED: Report Problems and Ask Questions

- Submit a case via the Ex Libris Support Portal:
<https://exlidp.exlibrisgroup.com>
- Or navigate from the Knowledge Center to the Support Portal:



IMPORTANT:

Contact information.systems@exlibrisgroup.com for assistance creating accounts or resolving login issues for the Support Portal.



Agenda

- Why Optimize Your Data?
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- **Next Steps, Support Resources, and Survey**

Revisit the Data Optimization Checklist

- Maintaining your Client Center settings = providing positive research experiences to users.
- Revisit the **Data Optimization Checklist** periodically.

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 consortium and regional 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, 360 Search, 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, 360 Search, 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

Recommended Knowledge Center Articles

Client Center:

- [Data Optimization Checklist for Discovery Services](#)
- [Offline Date and Status Editor for Updating Numerous Holdings at One Time](#)
- [Databases that Require Custom Configurations](#)

Intota:

- [Data Optimization Checklist for Discovery Services](#)
- [Databases that Require Custom Configurations](#)
- [Offline Date and Status Editor \(ODSE\) for Updating Numerous Holdings at One Time](#)

Both:

- [Resources That are Linked Directly in Results](#)
- [Valid Date Formats](#)

Additional Resources

- [Technical Seminar Presentations](#)
(located in the Cross-Product section of the Knowledge Center)
- Additional support resources within the Ex Libris Ecosystem:
 - [Ex Libris Support Portal](#)
 - [Idea Exchange](#)
 - [System Status Page](#)
 - [Developer Network](#)
 - [Summon Online Training](#)

Q & A

Any Questions?





Session Survey Evaluation

Please use the following [link](#) to provide feedback on your sessions:

<https://www.surveymonkey.com/r/techsem2017>

