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**Summon Training**

**Optimizing Client Center Settings**Hands-on Exercise

**Instructions:** This activity accompanies the [Optimizing Client Center Settings](https://knowledge.exlibrisgroup.com/Summon/Training/Client_Center_Essentials/05_Optimizing_Client_Center_Settings) training session. Use this checklist to make sure that your library’s Client Center settings are optimized to maximize discoverability and minimize linking errors.

* **Client Center:** [Library Settings](https://knowledge.exlibrisgroup.com/360_Services/360_Core_Client_Center/0Product_Documentation/Manage_Your_Library/Client_Center%3A_Library_Settings)
	+ Selected library’s **Authentication Type** and entered **Proxy Service URL**. (There is no need to enter the proxy URL anywhere else in the Client Center.)
	+ Selected library’s **Link Resolver Product** and entered **Link Resolver Base URL**. Left default in place for **360 Link**.
	+ Added all **Institutional IPs**, including proxy server IP ranges.
* **Client Center:** [Database Settings](https://knowledge.exlibrisgroup.com/360_Services/360_Core_Client_Center/0Product_Documentation/Manage_Your_Data/Client_Center%3A_The_Database_Details_Page/360_Services_and_Summon%3A_Databases_that_Require_Custom_Configurations)
	+ Downloaded **Database Details Report** to make the following databases settings verifications easier to perform.
		- Checked the **Display in** box (“Yes” appears in the **Database Details Report**) for all services where the resource needs to be discoverable. These may include:
		- 360 Core (E-Journal Portal)
		- 360 Link
		- 360 MARC Updates
		- Summon
		- Added institutional identifiers and/or custom URLs for tracked databases in this list: [Databases that Require Custom Configurations](https://knowledge.exlibrisgroup.com/360_Services/360_Core_Client_Center/0Product_Documentation/Manage_Your_Data/Client_Center%3A_The_Database_Details_Page/360_Services_and_Summon%3A_Databases_that_Require_Custom_Configurations).
		- Unchecked the **Use database-level URL for all titles in the database** box (“No” appears in the **Database Details Report**) unless using Dynix RPA for authentication.
		- Checked the **Omit Proxy from the Database** box (“Yes” in the **Database Details Report**) on databases that do not need to be proxied.

* **External Tool Settings**
	+ Reviewed proxy configurations to make sure that they contain:
		- Domain(s) for each content provider to be proxied
		- Special domains needed for content providers on this list: [Index-Enhanced Direct Linking Special Providers](https://knowledge.exlibrisgroup.com/Summon/Product_Documentation/Configuring_The_Summon_Service/Direct_Linking_in_the_Summon_Service/Summon_and_360_Link%3A_Index-Enhanced_Direct_Linking_Special_Providers).
		- Entry for Summon as described here: [Summon: Web-Based Proxy Support](https://knowledge.exlibrisgroup.com/Summon/Product_Documentation/Overview_of_The_Summon_Service/The_Summon_Administration_Console/Summon%3A_Web-Based_Proxy_Support).
	+ Configured all Abstracting and Indexing databases and databases containing citation-only content as 360 Link referring sources per the [Referring Source Setup Guide](https://knowledge.exlibrisgroup.com/360_Services/360_Link/0Product_Documentation/Configuring_360_Link_and_Setting_Up_Sources_and_Targets/Setting_Up_Linking_Sources/Referring_Sources/360_Link_and_Journal_Linker%3A_Referring_Source_Setup_Guide).
	+ Synchronized link resovler holdings with Client Center holdings if using a link resolver other than 360 Link with Summon.