360 Core: Getting Started

- **Product:** 360 Core Client Center

What do I need to do to start using 360 Core and the Client Center?

This document is designed to get you started as quickly as possible with 360 Core. The information below is not intended to be a complete guide to everything about 360 Core; rather, it is a place to begin as you start to implement 360 Core for your library.

Rather than describing every process here on this page, we have provided links to key documents and videos throughout the Knowledge Center that will explain the processes.

This document has three sections; click the section title here to jump straight to that section:

- **Getting Ready** -- Get access to the Client Center and the Knowledge Center.
- **Getting Set** -- Set up your library's 360 Core service.
- **Go!** -- Monitor and optimize 360 Core after your patrons start using it.

Getting Ready

The Client Center is the administrative interface for 360 Core and all your other 360 products. A working understanding of the tools in the Client Center is necessary to work with 360 Core and any other products in your 360 Suite.

**A. Access the Client Center**

Read about accessing the Client Center.

**B. Access the Knowledge Center**

You'll find documentation and short video tutorials here in the Knowledge Center. Once you've logged into the Client Center, you'll find the link to the Knowledge Center:

To learn more about the Knowledge Center and how it can help you with Ex Libris services, look at the following resources:

- Knowledge Center Questions and Answers
• Tips for Advanced Document Searching in the Customer Knowledge Center
• How to contact Ex Libris for assistance or to discuss technical matters?

Watch a short video overview: Introduction to the Knowledge Center

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**Getting Set**

To set up your 360 Core service, you need to do three major steps: (A) Learn to navigate through the Client Center; (B) Add and configure your resources in the Data Management system; and (C) Set up the patron interface so your patrons can begin using your ProQuest discovery services.

**A. Navigate the Client Center**

**Overview:** The overview provides information about the navigation on the home page. It includes links to contacts, updates and product information, webinars and upcoming conferences.

Read about the Client Center Home page navigation.

Watch a recorded webinar: 360 Core: Introduction to 360 Core and the Client Center.

**Accounts:** If you discover the Client Center interface looks or functions differently than you see in the Knowledge Center documents, user guides, and videos, it could be because your library doesn't subscribe to other ProQuest management and discovery services that incorporate particular features and links. On the other hand, it might be because your personal Client Center account does not have the appropriate permissions to see or change functionality.

Read about Client Center Accounts, especially the part about setting and editing account permissions.

**B. Manage Your Data**

Watch a short video: Populating Data Management - Provider and Database Search.

**Database Additional Options**

1. How to add a database:

Read about adding a database.

Watch short videos: Populating Data Management.

2. How subscribe to only some titles in a database:

Read about making a database selectable.
Watch a short video: Customizing Your Title List.

3. How to use the Offline Date and Status Editor (ODSE) to change status, dates, and other information about many titles at once:

Read about using ODSE to download a title list from a database, edit information about those titles, and upload the list to the Client Center.

Watch a short video: Customizing Your Title List. (The ODSE information starts about two minutes into the video.)

4. How to create a library-specific holdings database (also called "library-managed holdings"):

Read about using the library-specific holdings feature to create a database of library-specific holdings, including print holdings, etc.

Watch a short video: Library-Specific (Library-Managed) Holdings.

5. How to optimize your library's Data Management profile so that your patrons have an effective experience discovering and accessing your library's resources:

Read about Data Management optimization items.

C. Customize Your Patron Interface (the E-Journal Portal)

Read about customizing your patron interface via the Administration Console.

View recorded training: See the E-Journal Portal (A to Z List) section of 360 Link Training. The section provides relevant training whether or not you use 360 Link link resolver.

D. Enter Your Library Settings

Read about setting up your library information, including IP addresses and ranges, URLs, and so forth.

Watch a short video: Working with Library Settings.

E. Optional: Configure User Authentication

If you want your patrons to be authenticated before they can use the E-Journal portal, set up user (patron) authentication into the E-Journal Portal:

Read about the User Authentication service.
Go!

Now that your databases are set up and patrons are accessing your content, you can optimize 360 Core by assessing your patron usage and evaluating your collection.

A. Assess Your Patron Usage

Read about 360 usage statistics (reports for assessing library collection use through ProQuest discovery services).

B. Evaluate Your Collection

Read about overlap analysis (collection assessment tools).

Watch short videos: Overlap Analysis and Data on Demand.