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

Links should go to journals, not to database home pages.
Problem: Users Prompted for Second Authentication

Problem: Summon Displays Unsubscribed Resources
Learn How Fix These Problems and More
Agenda

- Why Optimize Your Data?
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What is the ProQuest Knowledgebase?

Apply rules, Clean, Normalize:
Full Text eJournal and eBook Metadata

ProQuest Knowledgebase

Client Center or Intota
Library’s Resources

Discovery | Management | Assessment
Hierarchy of Data in the ProQuest Knowledgebase

- Publishers, Aggregators, Societies, and Libraries
- Full Text, Multimedia, A&I, and Other Collections / Packages
  - Database
  - Database
  - Database
- Cover-to-Cover Full Text eJournal and eBook Titles
  - Holding
  - Holding
  - Holding
  - Holding

Contents of the Summon Index

- Library's Repositories & Study Guides
- Publisher & Aggregator Citations
- Searchable Full-Text Content
- Library's Catalog Records
- Abstracting & Indexing Citations
- Open-Access Citations
**Summon Index and Data Management**

- **Query**
  - **Summon Index**
  - **All Results**

**SUMMON RESULTS PAGE**

- **Your Library’s Results**
  - **Beyond Library**
  - **Knowledgebase**

**Client Center / Intota Controls “Rights” in Summon**

- **User:** Searches Summon for: “eco-tourism”
- **Summon Index:** Finds an article citation in: *Journal of Ecology*, May 2016
- **Client Center / Intota:** Indicates library has a subscription to: *Journal of Ecology*, 1998 to Present
- **User:** Sees the *Journal of Ecology* article citation in Summon and clicks on the link ...
**Summon Uses Index Enhanced Direct Linking (IEDL)**

If a direct link is not available:

**Summon Uses OpenURL in 360 Link**
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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:

<table>
<thead>
<tr>
<th>Priority</th>
<th>Steps to Take</th>
<th>Services Affected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical</td>
<td>Subscribe to databases not yet added to your Client Center's Data Management Area</td>
<td>360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon</td>
</tr>
<tr>
<td>Critical</td>
<td>Remove canceled databases from Data Management and hide them from your Discovery Services</td>
<td>360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon</td>
</tr>
<tr>
<td>Critical</td>
<td>Choose special consortium and regional databases only if they are appropriate for your library</td>
<td>360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon</td>
</tr>
<tr>
<td>Critical</td>
<td>Verify title selection is accurate. Select individual titles if your subscription does not cover the whole database</td>
<td>360 Core, 360 Link, 360 MARC Updates, Summon</td>
</tr>
<tr>
<td>Critical</td>
<td>Customize coverage dates for titles if your library subscribes to a data range other than the default date range</td>
<td>360 Core, 360 Link, 360 MARC Updates, Summon</td>
</tr>
<tr>
<td>Recommended</td>
<td>Hide databases containing selected (incomplete) full-text</td>
<td>360 Link, Summon</td>
</tr>
<tr>
<td>Optional</td>
<td>Add open-access resources to your holdings</td>
<td>360 Core, 360 Link, 360 MARC Updates, Summon</td>
</tr>
<tr>
<td>Optional</td>
<td>Create Library Specific Holdings databases for non-electronic titles only</td>
<td>360 Core, 360 Link, 360 MARC Updates, Summon</td>
</tr>
</tbody>
</table>

1. Review Database and Title Selections

2. Update Database Details (HINT: Use the Database Details Report)

<table>
<thead>
<tr>
<th>Priority</th>
<th>Steps to Take</th>
<th>Services Affected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical</td>
<td>Check the corresponding &quot;Display in&quot; box for each service in which you want a database included</td>
<td>360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon</td>
</tr>
<tr>
<td>Critical</td>
<td>Add Custom URLs and identifiers to databases from providers that require special settings for authentication</td>
<td>360 Core, 360 Link, 360 MARC Updates, 360 Search, Summon</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Library Academic Complete Subscription Collection</th>
<th>IVK</th>
<th>Subscribed</th>
<th>9511</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credo Reference All Titles</td>
<td>4</td>
<td>Subscribed</td>
<td>5800</td>
</tr>
<tr>
<td>BioMedCentral</td>
<td>5</td>
<td>Subscribed</td>
<td>549</td>
</tr>
</tbody>
</table>

- Add your “zero-title” databases for Summon

| Naxos Music Library Jazz                          | CIA | Subscribed | 0    |
| Naxos Spoken Word Library                         | 429 | Subscribed | 0    |
| Naxos Video Library                               | 42A | Subscribed | 0    |

- 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.

CRITICAL: Remove Cancelled Databases from Discovery

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

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

- Replace outdated databases with new ones:
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 – SCELC
  • Emerald – SURFmarket
  • Elsevier – ICM

CRITICAL: Verify Title Selection

• Whenever possible, select the whole database:

<table>
<thead>
<tr>
<th>Database Name</th>
<th>Code</th>
<th>Status</th>
<th>Titles</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABE/ENFORM Complete</td>
<td>ABE</td>
<td>Subscribed</td>
<td>6337</td>
<td>ProQuest</td>
</tr>
</tbody>
</table>

• When appropriate, select individual titles:

<table>
<thead>
<tr>
<th>BioMedCentral</th>
<th>BMC</th>
<th>Subscribed</th>
<th>63 of 589</th>
<th>BioMedCentral</th>
</tr>
</thead>
</table>

• 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:
  - Do NOT click the Add All Titles link.
  - DO uncheck the Title Coverage box.

- Don’t let this happen to you:

<table>
<thead>
<tr>
<th>Database Name</th>
<th>NAD Subscribed</th>
<th>North American Indian Drama</th>
<th>22 of 109</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASHE Transactions Journals</td>
<td>25 of 26</td>
<td>ASHE Transactions Journals</td>
<td>25 of 26</td>
</tr>
<tr>
<td>(Current)</td>
<td></td>
<td>American Society of Mechanical Engineers</td>
<td>25 of 26</td>
</tr>
</tbody>
</table>

CRITICAL: Verify Title Selection (continued)

- Avoid this!

- Choose the ALL titles option instead of ONLY SELECTED titles.
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)

CRITICAL: Verify Title Selection (some additional tips)

• When selecting individual title subscriptions, avoid the Single Journals database from the “Provider” called 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.

<table>
<thead>
<tr>
<th>Title</th>
<th>ISSN/ISBN</th>
<th>Type</th>
<th>Status</th>
<th>Date(s)</th>
<th>Custom Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accident Analysis &amp; Prevention</td>
<td>0001-4575</td>
<td>Journal</td>
<td>Subscribed</td>
<td>07/01/1999</td>
<td>01/01/2003 to 6 months ago</td>
</tr>
<tr>
<td>Accident and Emergency Nursing</td>
<td>0965-2302</td>
<td>Journal</td>
<td>Subscribed</td>
<td>01/01/1993 - 10/31/2007</td>
<td>5 years ago to Present</td>
</tr>
</tbody>
</table>

For holding details, 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.

Examples:
- Lawschool - Selected Full-text Titles
- Factiva (Selected Full Text)
- LexisNexis Academic (Selected Full Text only)

- 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.

OPTIONAL: Add Open-Access Databases

Download a list of open-access databases.

See article: Databases of Free E-journals, E-books, Images, and More
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.

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

💡 If you already have any Library Specific Holdings databases, check their settings.
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Run a Database Details Report

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

- Review your settings without opening each database individually.

Some columns are hidden in this example.
CRITICAL: “Display In” Desired Discovery Services

For more information:

- **Client Center**: Resource Status vs. Visibility
- **Intota**: Resource Status vs. Visibility

CRITICAL: Add Institution Identifiers

- Some providers require custom URLs and other special Database Details settings in **Client Center** and **Intota** for authentication.

**IMPORTANT:** For some databases, you MUST contact Support to request additional customizations.
CRITICAL: Do Not Use Database-Level URL for Titles

- 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
OPTIONAL: Add Custom Database Names and Descriptions

- Summern example:

  Database Names
  - Web of Science: Covers over 10,000 of the highest impact journals worldwide, including Open Access journals and over 110,000 conference proceedings
  - BioMedCentral: Publisher of 207 peer-reviewed open access journals

  Database Descriptions

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CRITICAL: Update IP Addresses

- Summon: Critical
  - Authentication banner
  - A & I resources
  - Special subscription content
  - See: Summon: Authentication Banner for Remote Users

- 360 Link: Optional
  - Google Scholar integration
  - See: 360 Link: Google Scholar Setup

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

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
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?
...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  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
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**CRITICAL: Check Knowledgebase Notifications**

- 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

- Click for information and instructions.
- Add notes and keep track of your work.

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.
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:

[Image of Support Portal]

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

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• Why Optimize Your Data?
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Revisit the Data Optimization Checklist

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

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### 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

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### Q & A

**Any Questions?**
Session Survey Evaluation

Please use the following link to provide feedback on your sessions:

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

THANK YOU