# Data Optimization for Discovery Services

[Library Name or Date]

[Trainer Name]

[Trainer Title]

![ExLibris a ProQuest Company]

# Agenda

- **Why Optimize Your Data?**

- Under the Hood

- Data Optimization

- Ongoing Evolution of your Collection

Prerequisite:  Experience with basic Intota navigation.

# Progress Report

✓ Key databases added to Intota?

✓ User Accounts and Permissions set up for staff?

✓ Library Settings correct?

# Problem: E-Journal Portal Links to Database Homepage



**University Library**

| All Resources | E-Journals | E-Books |

0-9 A B C D E F G H I J K L M N O P Q R S T U V W

Title begins with ▾ | [ ] | Search

-- Please select a subject category -- ▾ | Search | -- Please select a medical sub

**15 records** retrieved for the search: **Title begins with "journal of behaviora"**

**Behavioral sleep medicine** (1540-2002)
Alternate Title: Journal of Behavioral Sleep Medicine
from 2003 to 2011 in Electronic Collections Online
from 03/01/2003 to 18 months ago in Academic Search Premier

**Journal of behavioral and applied management**
from 09/01/2004 to present in Academic Search Premier
from 01/01/2005 to present in ABI/INFORM Complete, ABI/INFORM Complete (Alumni Edition) and ProQuest Central

**Journal of Behavioral and Experimental Economics** (2214-8043)
from 04/01/2014 to present in ScienceDirect Journals

**Journal of Behavioral and Experimental Finance** (2214-6350)
from 03/01/2014 to present in ScienceDirect Journals

**Journal of behavioral assessment** (0164-0305)
from 03/01/1979 to 12/31/1984 in SpringerLINK Archive - Behavioral Science

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

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# Problem:  Users Prompted for Second Authentication

# Problem: Summon Displays Unsubscribed Resources

# Problem: Missing MARC Records

## Hosted Links

## Direct Links

# Learn How to Fix These Problems and More

2018-01-04

# Agenda

- Why Optimize Your Data?

- **Under the Hood**
  - **ProQuest Knowledgebase / Intota Basics Refresher**
  - Summon and Your Resources
  - Some Common Summon Questions

- Data Optimization

- Ongoing Evolution of your Collection

ExLibris

# What is the ProQuest Knowledgebase?

| Provider Metadata Databases / Titles | Provider Metadata Databases / Titles | Provider Metadata Databases / Titles | Provider Metadata Databases / Titles | Provider Metadata Databases / Titles |

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

## ProQuest Knowledgebase

### Intota
Library's Resources

**Discovery | Management | Assessment**

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# Hierarchy of Data in the ProQuest  Knowledgebase

Publishers, Aggregators,
Societies, and Libraries

**Provider**

Full Text, Multimedia,
A&I, and Other
Collections / Packages

**Database** **Database** **Database**

Cover-to-Cover, Full Text,
E-Journal and E-book Titles

**Holding** **Holding** **Holding** **Holding**

ExLibris

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# Contents of the Summon Index

Library's Repositories & Study Guides

Library's Catalog Records

Publisher & Aggregator Citations

Abstracting & Indexing Citations

Searchable Full-Text Content

Open-Access Citations

## Summon Index

Journal Articles

Video Recordings

Research Guides

Conference Proceedings

Music Scores

Books / Ebooks

Newspaper Articles

Audio Recordings

Dissertations / Theses

Realia

Artifacts

Maps

Government Documents

Archival Materials

Reports

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# Summon Index and Intota Resources

# Intota Library Resources Control "Rights" in Summon

**User:**

Searches Summon for:
"eco-tourism"

**Summon Index:**

Finds an article citation in:
*Journal of Ecology*, May 2004

**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 …

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# Summon Uses Index Enhanced Direct Linking (IEDL)

Summon Direct Linking → Full-Text Article

# Summon Uses OpenURL in 360 Link

# Summon Uses OpenURL in 360 Link
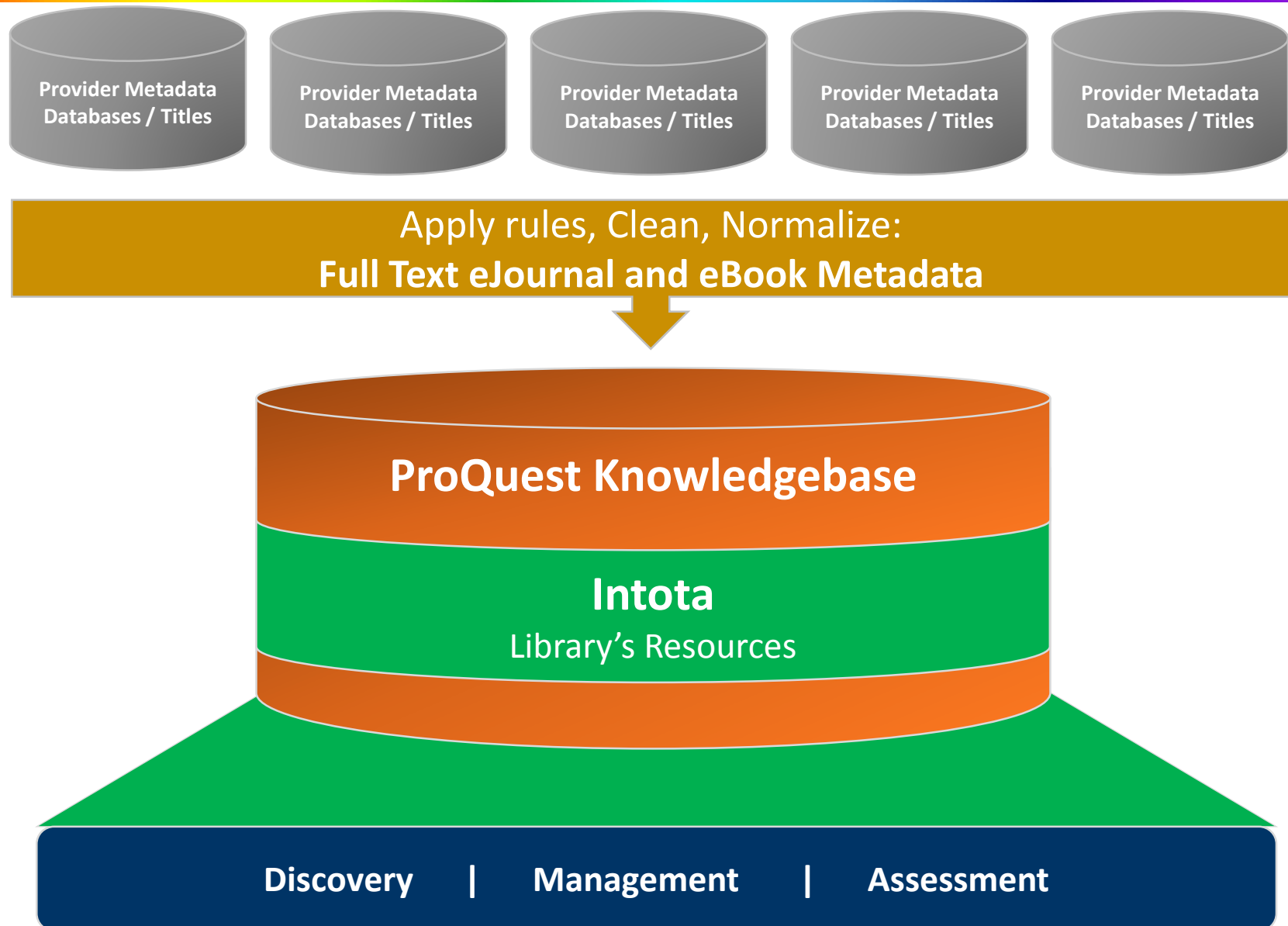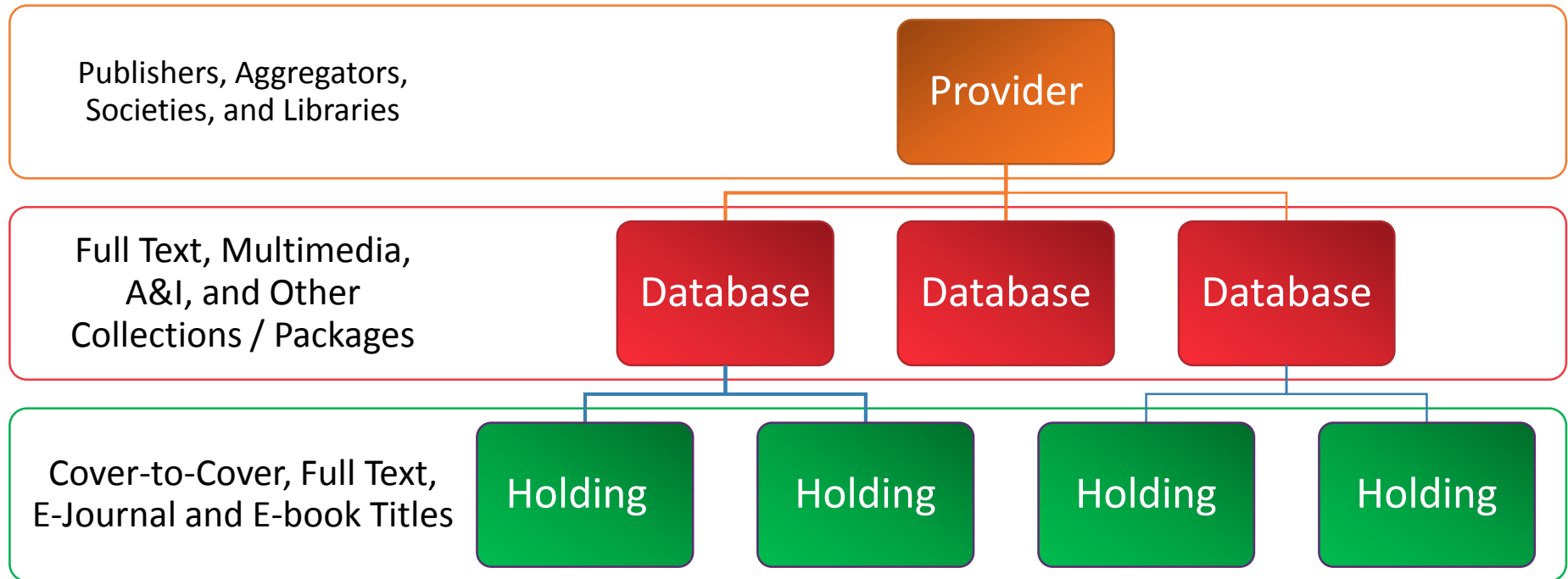
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- Why Optimize Your Data?

- **Under the Hood**
    - ProQuest Knowledgebase / Intota Basics Refresher
    - Summon and Your Resources
    - **Some Common Summon Questions**

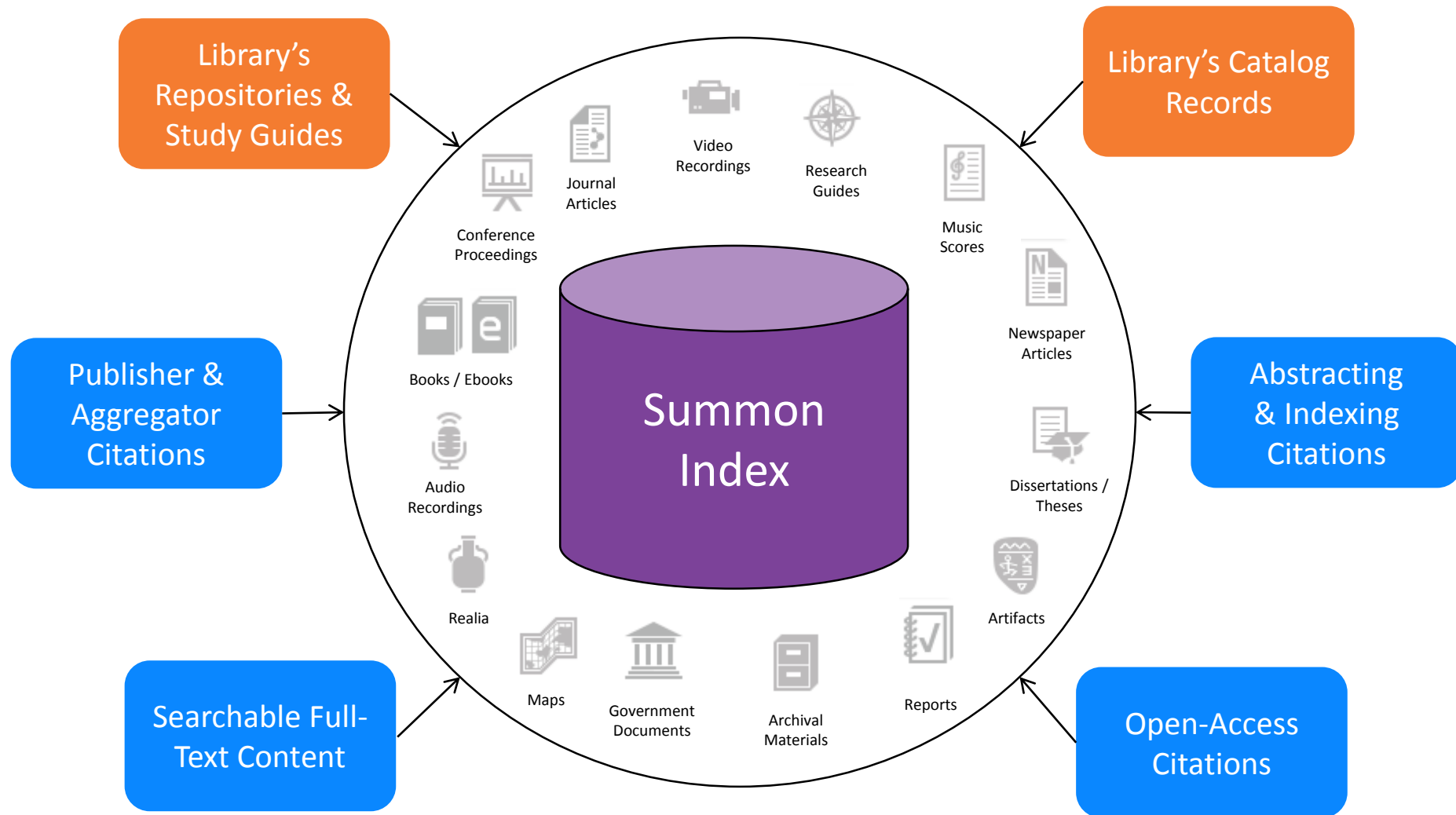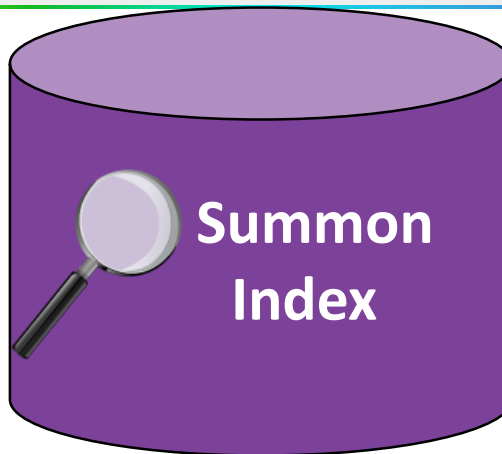- Data Optimization

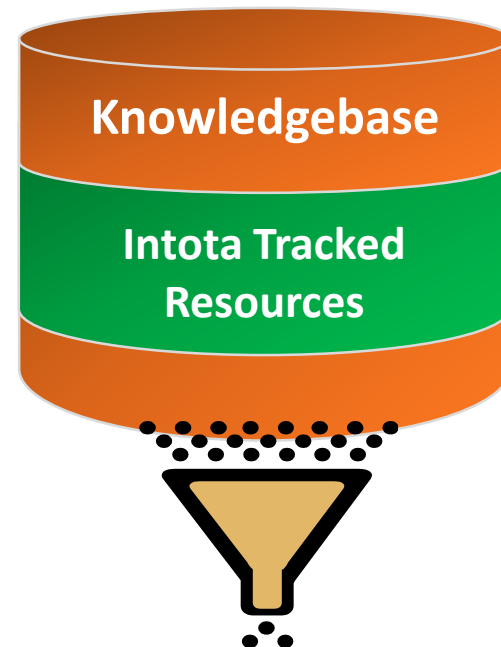- Ongoing Evolution of your Collection

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# Summon Index Breadth

Any Summon library will likely have some unique titles *not* currently discoverable in Summon.

- New content is always being added.  Watch [Summon Release Notes](#)  and the [Summon Listserv](#) for content  announcements.

- See the [Summon: Provider Content in the Summon Index](#) article for:
  - Publisher, package, and title lists that give the overall sense of the scope of the Summon Index.
  - Instructions on how to confirm if specific content is covered in the Summon Index.

**2.7 + Billion Citations And GROWING**

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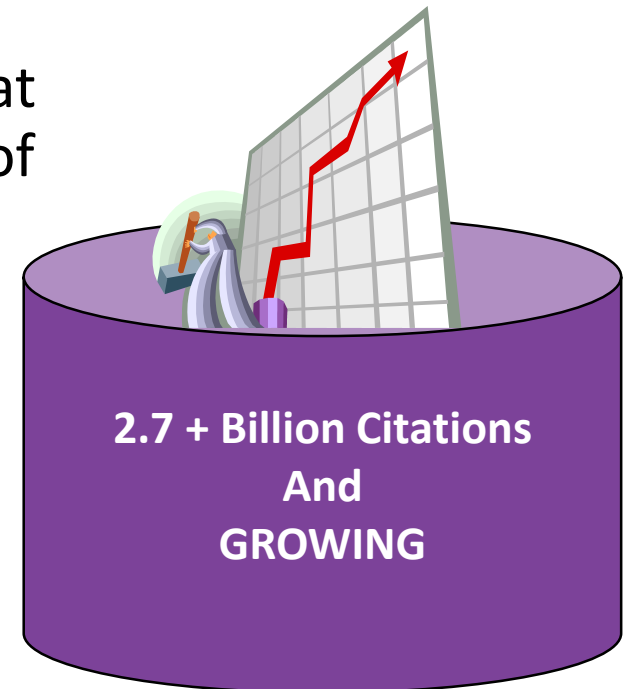
# Catalog Records vs Intota for E-resources?  Do both!

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 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.



### Information evaluation
by Capet, Philippe, editor of compilation
2014

During the reception of a piece of information, we are never passive. Depending on its origin and content, from our personal beliefs and convictions, we bestow…

eBook: Full Text Online ← Access based on catalog record

eBook: Full Text Online ← Access based on Intota holding

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# Data Optimization Checklist

- Use the Data Optimization Checklist to ensure that Intota will provide the best possible user experience with your Discovery tools:

## 1. Review Database and Title Selections

| √ | Priority | Steps to Take |
|---|---|---|
| | Critical | Review your subscribed databases in Intota, and add any missing resources. |
| | Critical | Remove cancelled databases from Discovery Services. |
| | Critical | Choose regional and consortium databases only if they are appropriate for your library. |
| | Critical | Verify your title selections: Select individual titles only if your subscription does not cover the whole database. |
| | Critical | Customize coverage dates for titles if your library subscribes to a date range other than the default date range. |
| | Recommended | Hide databases containing selected (incomplete) full-text from Summon and 360 Link. |
| | Optional | Add open-access resources to Intota. |
| | Optional | Create Custom Databases for non-electronic holdings such as print and microform. |

## 2. Refine Database Settings  (HINT: Use the Database Details Report)

| √ | Priority | Steps to Take |
|---|---|---|
| | Critical | Confirm that the desired Discovery Services are turned on for your databases. |
| | Critical | Add Custom URLs and identifiers to databases from providers that require special settings for authentication. |
| | Critical | |

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# Agenda

- Why Optimize Your Data?

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- **Data Optimization**
  - **Review Database and Title Selections**
  - Refine Database Settings
  - Configure Library Settings and External Tools
  - Stay Informed and Get Help

- Ongoing Evolution of your Collection

# CRITICAL: Add Your Subscription Databases

- Add your full-text eJournal and eBook databases:



Your library's catalog, study guides and repositories will appear as 0-title databases.

We add these for you.

- Add your "zero-title" databases for Summon:
  - [Abstracting and indexing (A & I)](#)
  - [HathiTrust](#)
  - Special content types (videos, audio, images, etc.)
  - [ProQuest Dissertations](#) (can be made to work with 360 Link too)

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# CRITICAL: Remove Cancelled Databases from Discovery

Cancelled a database or still have an outdated one in your list?

- Set Status as needed AND turn **Off**
  Discovery  Services:

  Status  Cancelled

  **Discovery**

  360 Core    Off
  360 Link    Off
  360 MARC Updates    Off
  Summon    Off

- Or, set the databases to "Not Tracked" to completely remove it from Intota:

  Status    Not Tracked

- Replace outdated databases with new ones:

  ... your resources

  ProQuest Sociology
  ProQuest - M2S

  ProQuest Sociology (Legacy Platform)
  ProQuest - PQA

# CRITICAL: Choose Correct Regional and Consortium Databases

- Choose databases designed for your region if available:
- Examples:
  - African Writers Series - International Clien
    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

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# CRITICAL: Verify Title Selection

- Whenever possible, select the whole database:



| | | |
|---|---|---|
| ☐ | **ProQuest Central**<br>⚙ Subscribed - ProQuest - 7XB | 🗄 Database<br>16093 titles |

- When appropriate, select individual titles:



| | | |
|---|---|---|
| ☐ | Wiley-Blackwell Journals (**Frontfile** Content)<br>⚙ Subscribed - Wiley-Blackwell - 10C | 🗄 Database<br>146 of<br>2049 titles |

- Use the right tool for the job:
  - Hand-pick titles if you have just a few.
  - Upload your title list using the Offline Date and Status Editor (ODSE).

> 💡 Use Excel's VLOOKUP function to match your vendor's title list for a database to Intota's title list for a database to simplify upload.

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# CRITICAL: Verify Title Selection (continued)

- If your Title Coverage option is "**ONLY SELECTED titles**", but you really subscribe to the whole database…



**About**

| | |
|---|---|
| Database Name | American Chemical Society Single Title Subscriptions |
| Provider Name | American Chemical Society |
| Status | Subscribed |
| Title Coverage | ONLY SELECTED titles (4 of 21) Manage titles |

**About**                    * Required Field    Cancel  Save

| | |
|---|---|
| Database Name * | American Chemical Society Single Title Subscriptions |
| Provider Name | American Chemical Society |
| Collection | |
| Status | Subscribed |
| Title Coverage | ONLY SELECTED titles  ALL titles |

- Don't let this happen to you:

Choose the **ALL titles** option instead of **ONLY SELECTED titles**.

Oxford Journals Mathematics and Physical Sciences Collection
Subscribed - Oxford University Press

Database 34 of 38 titles

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- Sign up for **Automated Holdings Management** 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**

| 05/28/2014 | Ebook Library |
| 05/28/2014 | ebrary Perpetual Access, PDA and STL |
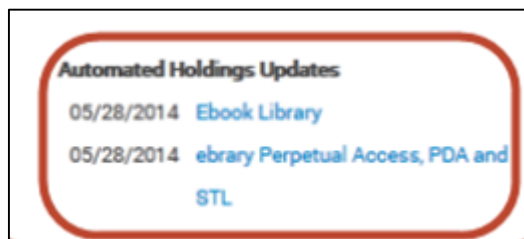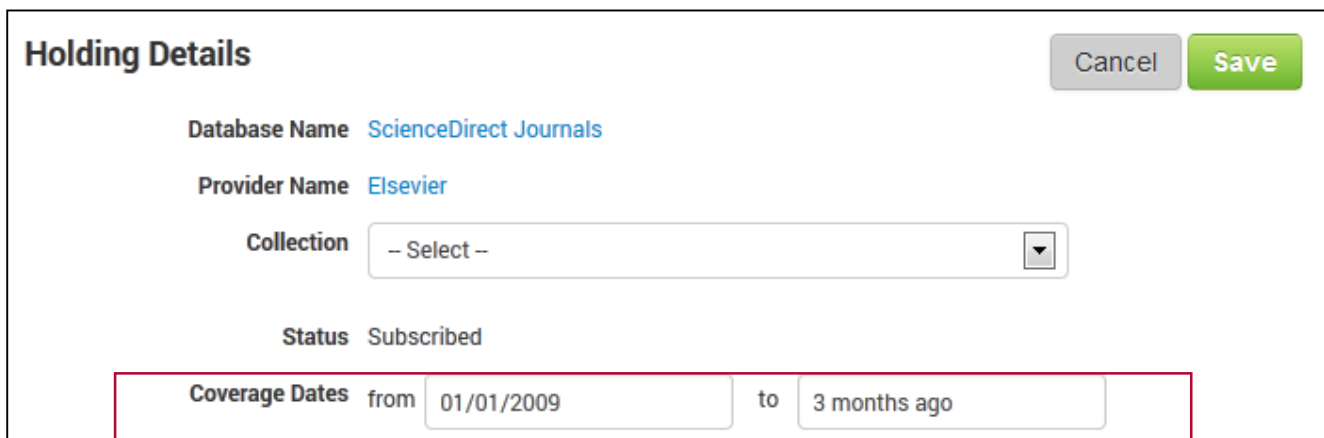
- Avoid the **Single Journals** database from the "Provider" called **Multiple Vendors** when selecting individual titles.  Choose real provider databases to improve linking reliability.

Single Journals
⚙ Subscribed - Multiple Vendors

🗄 Database
26 of
4834
titles

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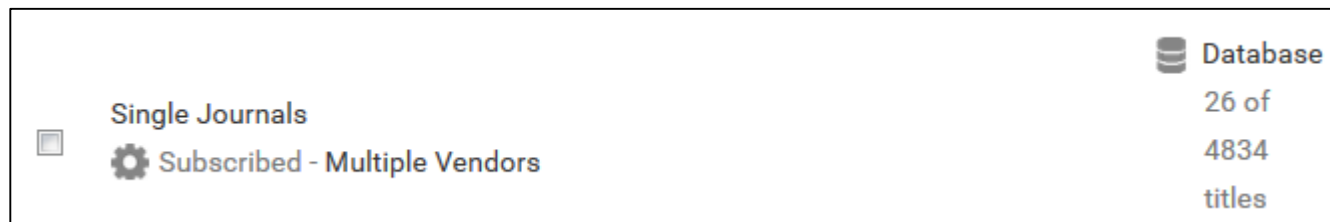
# CRITICAL: Customize Coverage Dates

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



- Use valid date formats when entering dates:
  - Fixed dates (such as **01/01/2003**)
  - Relative dates (such as **5 years ago**)
- 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.

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# RECOMMENDED:
# Hide Partial-Coverage Databases

- Certain databases contain [journals with partial content](#) coverage; some articles are missing.
- These databases have names containing the words "Selected Full Text" in parentheses.
- Avoid broken article links by hiding these databases from **Summon** and **360 Link**.
- Consider showing these databases 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) |

**Discovery**

| | |
| --- | --- |
| 360 Core | On |
| 360 Link | Off |
| 360 MARC Updates | On |
| Summon | Off |

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# OPTIONAL: Add Open-Access Databases

## KnowledgeWorks: Databases of Free E-journals, E-books, Images, and More

Date Created: Feb 09, 2014     Last Updated: Oct 29, 2014     Article Number: 8330

🖨 Print     ✉ Email this page     ⊕ Follow Me     🔗 Share Article Link

> Sign up for email updates here.

### Which databases tracked by ProQuest are free e-resources?

**Update October 28, 2014:** Added 1 database to the list of Free Resources: Wayne State University Ramsey Juvenile Literature Collection.

**Update October 14, 2014:** Added 1 database to the list of Free Resources: Wiley-Blackwell AGU Free Content.

Serials Solutions 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 profile in the Client Center.

However, we are aware that there are some databases we track that have free journals bu[...] problem is we have no way of confirming whether databases have free journals; that inform[...] vendors. We have no automated way to generate and maintain this list.

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

The[...]fore, we must rely on you, our clients, to help us maintain this list:

[...]ou know a database tracked by Serials Solutions has free journals but isn't on this l[...] [...]nu near the top of this page, and select Category: Support Center).
[...]ou know journals in a database on this list aren't free, again, let us know.
[...]provider doesn't distinguish between free and subscription-only journals in the monthly reports supplied to us, [...]appreciate updated information submitted from our user community.
[...]ou know of a database that has free journals but Serials Solutions does not track it, please follow the instructions here.

> Download a list of open-access databases.

[...]ill be updated as often as warranted, but probably not more than once a month. Please subscribe to this Answer (click **Follow Me**) to receive an e-mail message each time it's updated.

### Databases of Free Journals Tracked by ProQuest

List of Free Resources Tracked by ProQuest (spreadsheet updated October 28, 2014)

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# OPTIONAL: Create Custom Databases

- Include your library's print and microform journal collections in your own [Library Specific Holdings](#) database.
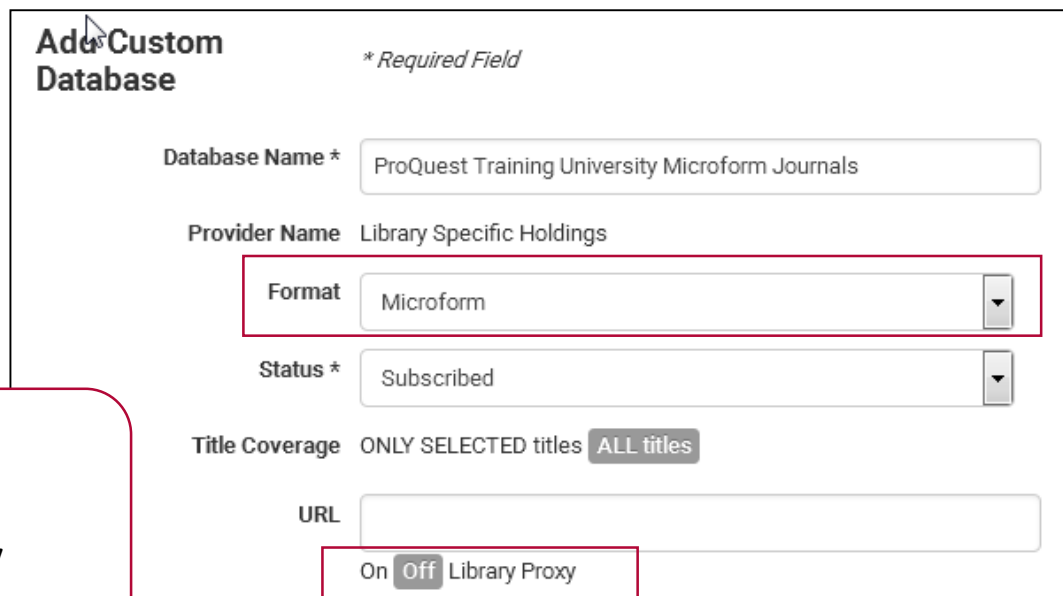


- Remember to:
  - Select a **Format**.
  - Turn **Off** your **Library Proxy.**

> If you already have **Library Specific Holdings** databases, check their **Format and Proxy** 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: Turn Resources "On" in Discovery Services

**Credo General Reference** (54N)

http://www.credoreference.com
**Credo Reference**
619 titles (619 books, 0 journals)

✔ Resource Type
**Database**

✔ Status
**Subscribed**

✔ Discoverable
360 MARC Updates, 360
Link, 360 Core, Summon

## Titles (619)                                    View All

## About                                           Edit

| | |
|---|---|
| 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 worldÆs best reference titles; all cross-referenced for searching ease and excellence |

## Discovery                                        Edit

| | |
|---|---|
| 360 Core | On |
| 360 Link | On |
| 360 MARC Updates | On |
| Summon | On |

**360 Core**

**360 Link**

**360 MARC Updates**

**Summon**®

ⓘ For more information, see:
**Resource Status vs. Visibility in Various Services**

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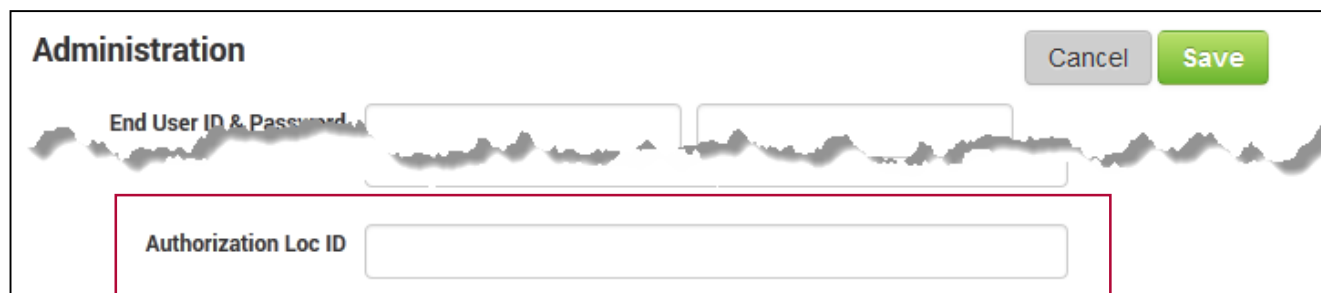
# CRITICAL: Add Institution Identifiers

- Some providers require special settings for authentication.
- Settings vary by database and provider. See the [Databases that Require Custom Configurations](#) for details.
- You may need to:
  - Customize your database URLs:



  - Add special authorization codes or identifiers:



  - Contact ProQuest Support for "title level" URL customizations.

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# CRITICAL: Do Not Use Database-Level URL for Titles
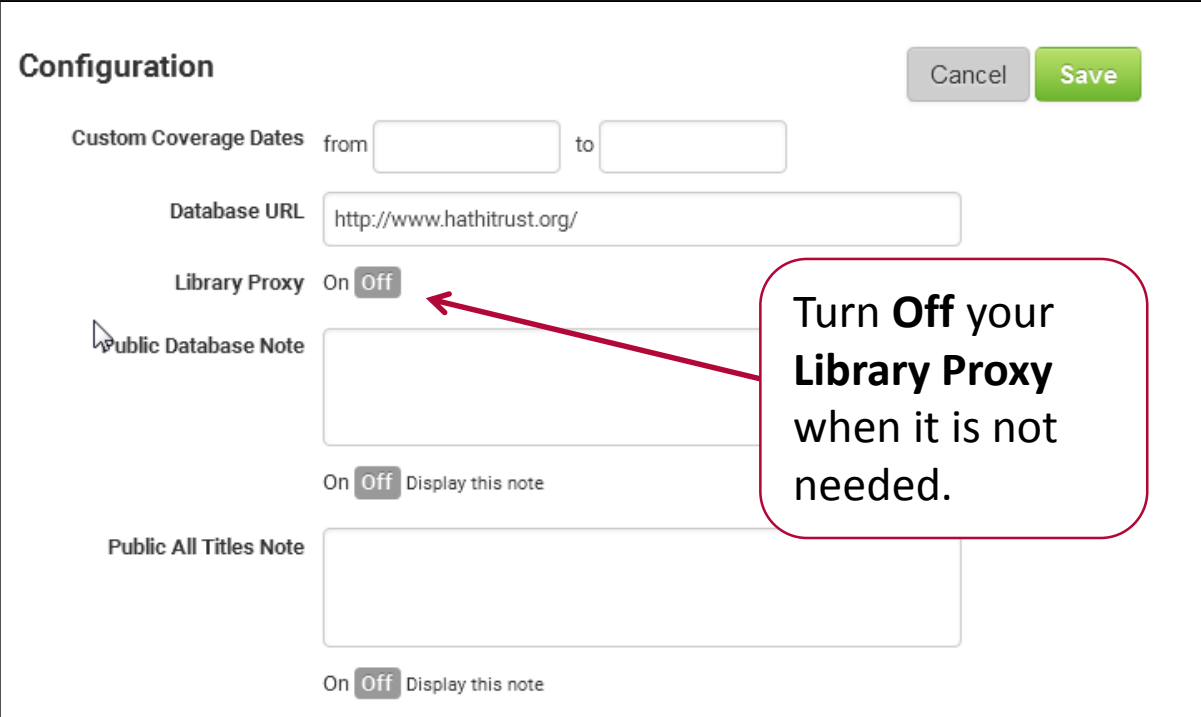
- Review your Database Details Report for this setting.

**Use database-level for all titles**

- This setting is ONLY for libraries that use Dynix RPA for remote authentication

- Contact ProQuest Support if the "Use database-level for all titles" column contains a "Yes" for any of your databases and you do not use Dynix RPA.

- We will turn off the setting and help you fix any URL issues that may have prompted you to select this option in the past.

# 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



Turn **Off** your **Library Proxy** when it is not needed.

# OPTIONAL: Add Custom Database Names & Descriptions

**Titles** (6547 tracked of 6547)                                                              View All

**About**                          * Required Field                              Cancel    Save

Database Name *    ABI/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

You may also want to learn about Public Notes and Location Notes.

- Summon example:
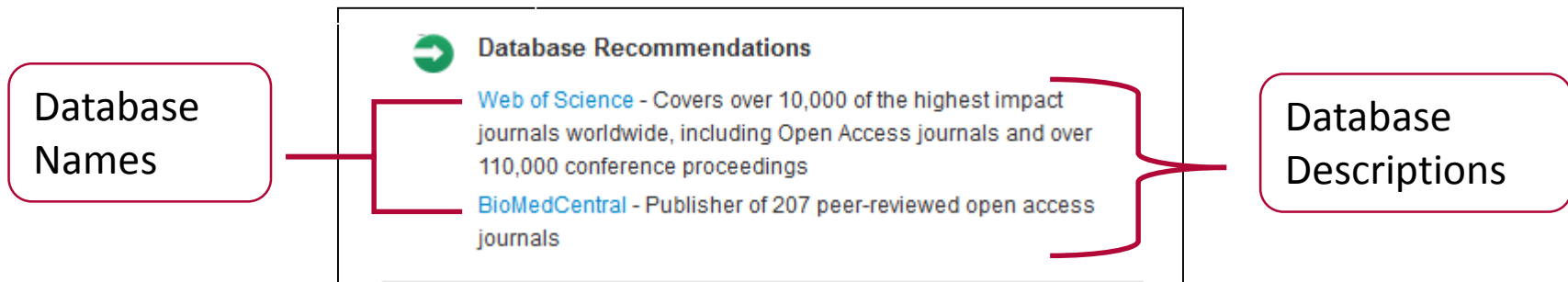
**Database Recommendations**

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 Names

Database Descriptions

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# CRITICAL: Update IP Addresses

**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

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

- 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

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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: [Resources That Support Index Enhanced Direct Linking](#).
- Add Summon to your proxy configurations.  See: [Summon: Web-Based Proxy Support](#)

ExLibris
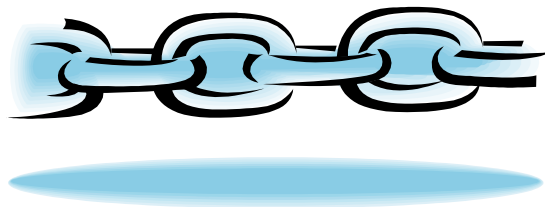
# CRITICAL: Configure 360 Link Referring Sources

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



- The referring source activation procedure varies by database provider.

- 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.

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# CRITICAL:
# Check Knowledgebase Notifications

Help

## Knowledgebase Notifications

Click for information and instructions.

Cancel   Save

| 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 | | ☑ |
| 05/06/2014 | Other Notifications and Content Changes | Ebrary | ebrary Perpetual Access, PDA and STL | Titles Missing from ebrary Perpetual Access, PDA and STL Database -- May 2014 | | ☑ |
| 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. | ✖ ☑ |
| 06/13/2014 | Title-Level URL Changes | | | hieme-hieme: Change -- | 06/17/2014 - Asked IT to update proxy. 06/19/2014 - Done. | ✖ ☑ |
| 06/25/2014 | Other Notifications and Content Changes | ProQuest | Multiple | Summon: ProQuest Dissertations and Theses Databases Update | | ☐ |

Add notes and keep track of your work.

---

### Intota™

Home | Resources | Tool

**RESOURCE SUMMARY**

Providers (49)

Databases (115)

Holdings (375833)

Ebooks (280847)

Ejournals (94986)

Collections (1)

**QUICK LINKS**

⚠ Alerts        ⊕ Add Alerts

🖼 Contacts

📗 Licenses

🗒 Notes

Knowledgebase Notifications (New! 01/23/2015)

**Databases**

Manage Your Databases

ⓘ For older changes, see: KnowledgeWorks Summary of Provider and Database Changes

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# RECOMMENDED:
# Check Release and Service Announcements



Support Center:   Release and Service Announcements for 360 Services, Intota, KnowledgeWorks, Summon, and Ulrich's

Click to receive email when new announcements are posted.

- Receive important announcement about your Discovery Services.

- Learn tips and tricks from other libraries in the user community.

- Share ideas on how to make the most of your Discovery Services.

- Join the conversation.

# RECOMMENDED: Report Problems and Ask Questions

- Submit a case via the Support Center:
  - Go to  http://support.proquest.com/portal
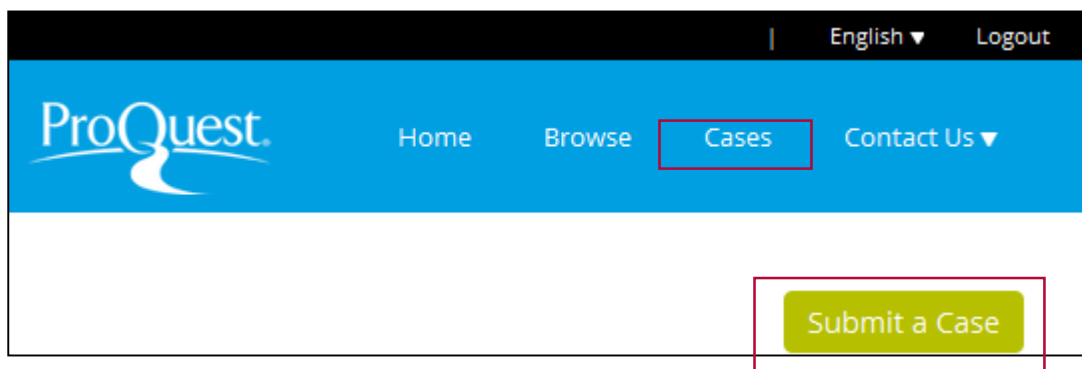
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- Under the Hood

- Data Optimization

- **Ongoing Evolution of your Collection**

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# Revisit the Data Optimization Checklist

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

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|---|----------|---------------|
| | Critical | Review your subscribed databases in Intota, and add any missing resources. |
| | Critical | Remove cancelled databases from Discovery Services. |
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| | Recommended | Hide databases containing selected (incomplete) full-text from Summ[on and] 360 Link. |
| | Optional | Add open-access resources to Intota. |
| | Optional | Create Custom Databases for non-electronic holdings such as print and microform. |

## 2. Refine Database Settings (HINT: Use the Database Details Report)

| √ | Priority | Steps to Take |
|---|----------|---------------|
| | Critical | Confirm that the desired Discovery Services are turned on for your databases. |
| | Critical | Add Custom URLs and identifiers to databases from providers that require special settings for authentication. |

# Thank You!

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