

SerialsSolutions®

A ProQuest® Company



Client Center User Guide

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1. INTRODUCTION

Welcome to the **360 Core** Client Center User Guide. This document provides instructions on how to use all of the features available to you for managing your electronic resources in the Serials Solutions Client Center.

1.1. Logging In and Logging Out

Log in to the Client Center by clicking **Login Center** at the top of the main Serials Solutions website (www.serialssolutions.com):



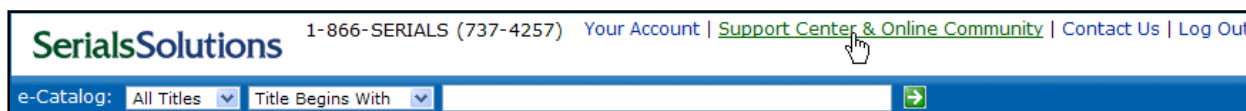
Then click **Serials Solutions Client Center**. You can also bookmark the login page at: <http://clientcenter.serialssolutions.com/>.

Once logged in, you can log out using the “Log Out” link at the top of every Client Center Page. Note that the system automatically logs you out if there is no interaction with the system for about 10 minutes.

Note: Several features of the Client Center require your web browser to have Javascript (a cross-platform scripting language vaguely related to Java). If your browser doesn't have Javascript, some features on various pages of the Client Center may look or function differently than they do here in this User Guide.

1.2. Finding Help

The Client Center's **Support Center** is where you can quickly access guides, FAQ, and other documentation for every Serials Solutions product. You can find your way to the **Support Center** by clicking on the link at the top of all pages in the Client Center:



If the answer to your question cannot be found in this User Guide or within the Support Center, please contact us directly for help:

- Use the **Ask A Question** tab near the top of each page in the Support Center;
- Call us at 866-SERIALS (866-737-4257), ext. 4 (Mon. – Fri., 6 a.m. to 6 p.m. PST); or
- Send email to clients@serialssolutions.com.

1.3. What's New In This Guide?

Subject	Page	Date Added
Offline Date and Status Editor	40	August 2008
Overlap Analysis Export	47	Nov. 21, 2008
Consortium Member Library Functions	65	Dec. 12, 2008 Updated April 13, 2009 Updated July 7, 2009
Usage Statistics	49	Updated July 24, 2009
E-Journal Portal Customizer is now Administration Console	59	Dec. 22, 2009

2. NAVIGATING THROUGH THE CLIENT CENTER

Because there is so much in the Client Center, navigating through it can seem overwhelming. To help you get around in the Client Center, we've provided several navigation features that you need to understand in order to more effectively manage your data and products. This guide has three sections that detail those navigation features:

- **Navigating Through the Client Center.** You're reading this chapter right now, and it covers details about the basic navigation aids.
- **Using the e-Catalog to Find Resources.** You can find this in Chapter 3 on page 7. It includes all of the details about the e-Catalog, the industry's most comprehensive database of electronic resource metadata and, in many cases, the fastest way to begin managing a resource.
- **Details Screens.** This is found Chapter 4, Section 2 (on page 15) and explains how to find Details screens, which are used to display and customize the metadata for a resource, whether at the provider, database, authority, or holdings level. The details in this section are used throughout the remainder of the guide when discussing resource customization tasks.

2.1. Client Center Home Page

If you have more than one library, the first screen you see after logging in prompts you to select a library. Otherwise, the Client Center Home Page is the first screen you see after logging in to the system. It's the easiest place for you to begin all of your resource management activities, and includes direct access to the e-Catalog, all management and analysis tools available to your library, and information about Serials Solutions and our products.

You can always return to the Home Page by clicking on the "Home" link on every Page.

The Home Page is divided into three basic sections:

- **Page Header.** The page header contains some account navigation tools and the e-Catalog search form.
- **News Sidebar.** The left side of the page contains information about Serials Solutions, products, and news.
- **Client Management Tools.** The right side of the page has links to all of the primary resource and product management tools. From here, you're a click away from your most common tasks.

See the screenshot on the next page and the table that follows to identify each feature on this page. You may not have all the different sections or functions shown on the screenshot; it changes depending on the Serials Solutions products to which your library subscribes.

SerialsSolutions 1-866-SERIALS (737-4257) Your Account | Support Center & Online Community | Contact Us | Log Out 15205

e-Catalog: 2 titles Title Begins With

Home 3

Home

News More... 4

26 new resources added to KnowledgeWorks in June (7/1/2009)
Release news: streamlined Support Center access and 360 Core enhancements (6/30/2009)
June NewsUpdate (6/24/2009)

Webinars More...

In Person More...

Products 5

- 360 Link
- 360 Search
- 360 MARC Updates
- 360 Resource Manager
- 360 Counter
- 360 Core
- 360 Consortium Edition
- Summon

Manage Your Data

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Advanced 360 Resource Manager Tools 8

Collections 8 Licenses

Menus 8 Notes

Alerts 8 Cost Data Upload

Contacts 8 Reports

Assessment Tools 9

Usage Statistics 9 Vendor Statistics Metadata

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Manage Your Products 10

360 Core

View E-Journal Portal OCLC eSerials Holdings Service

Administration Console Data On Demand

360 Link

Administration Console Google Scholar Setup

Summon

Summon Customizer

Manage Your Library 11

Accounts 11 View Changes

Library Settings 11 View Member Libraries

#	Feature	Description
1	Top-Level Navigation	Manage your account, get access to help or Serials Solutions contact information, or log out. Access other library profiles if you have them.
2	E-Catalog	Search for a title, database, or provider using the e-Catalog (see page 7).
3	Bread-Crumb Navigation	Navigate to previously accessed pages using the bread-crumb navigation on each page.
4	Serials Solutions Information	Read Serials Solutions news, learn about upcoming webinars, and find out at which conferences you can meet with staff.
5	Products	Review your subscribed (green checks) and unsubscribed products.
6	View Data Summary	View a count of your total holdings, unique titles, and subscribed databases.
7	Data Management	Access the Data Management home page to work with your holdings (see page 14).
8	Advanced 360 Resource Manager Tools	Access various resource tools. (360 Resource Manager clients only; see the 360 Resource Manager User Guide for details.)
9	Assessment Tools	Perform overlap analyses; determine usage statistics and more (starting on page 44).
10	Manage Your Products	Customize your subscribed products, download spreadsheet data, and manage your services.
11	Manage Your Library	Manage your library settings, such as your proxy, URLs, IPs, and date format, and manage staff accounts (see page 62).

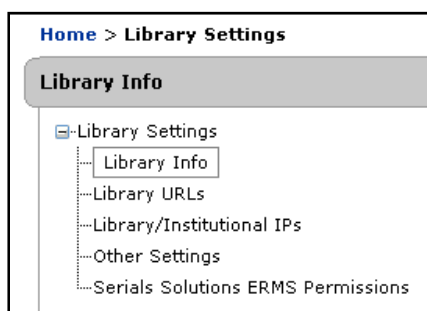
2.2. More Navigation Features

Besides the Client Center Home Page, there are four primary navigation features available to help you move around within the Client Center:

- **Bread Crumbs.** Each page includes a “bread crumb” trail at the top that allows you to move back up one or more levels to where you started. For example, if you start at the Data Management Home Page and navigate down to the management page for ABI/INFORM, you can move back up to the Data Management page or the Client Center Home Page with a single click. **Note:** These links are tied to a specific hierarchy, not necessarily to how you arrived at the page

[Home](#) > [Data Management](#) > [Database Details](#)

- **Navigation Tree.** When you access any of the tools under “Manage Your Data,” “Manage Your Products,” and “Manage Your Library,” you’ll see a left-hand navigation tree throughout the pages. While the bread crumb trail tracks your levels in the Client Center (the bigger navigation picture), the navigation tree tracks your levels within each tool. Use the hierarchy of links in the navigation tree to move to the specific pages you need to access.



- **Account Navigation.** At the top of every page is a small navigation menu that gives you quick access to your account details, the Support Center and Online Community, Serials Solutions contact information, and the “Log Out” link. If you can access more than one library profile, you can change profiles here.

SerialsSolutions 1-866-SERIALS (737-4257) [Your Account](#) | [Support Center & Online Community](#) | [Contact Us](#) | [Log Out 15205](#)
Current Library: 360 Resource Manager Consortium Demo (ERM) ([Change](#))

- **E-Catalog.** The e-Catalog also appears at the top of every page throughout the Client Center and provides a quick way to find a journal, book, database, or provider. This tool is described in more detail in the e-Catalog Chapter (page 7).

e-Catalog:

- **Data Management Home Page.** The Data Management home page is the primary page used for managing your resource data. For more details on this page, see the “Manage Your Data” Chapter of this guide (page 14).

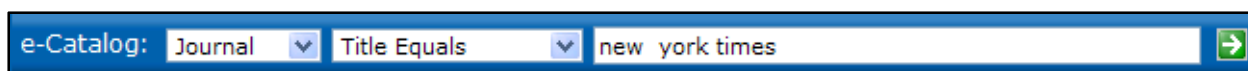
3. USING THE E-CATALOG TO FIND RESOURCES

The e-Catalog search form can be found at the top of every page in the Client Center and is the primary searching tool for you to find resources that you need to manage, whether those resources are databases or individual titles. Use the Serials Solutions e-Catalog to find journals or databases across the entire universe of e-resources that Serials Solutions tracks. Find any title in any database, whether you subscribe to it or not. See coverage dates for each holding, or click through to the metadata level and view the subject headings attached to the title. Clients with the 360 MARC Updates service can also view all of the MARC records available for a title.

3.1. Finding Journals

Use an ISSN, eISSN, exact title, or title fragment to find the exact journal you need.

For example, find every database that has access to “The New York Times” by using a “Journal Title Equals” search:



The search results contain the journal title:


e-Catalog Title Search Results				
<input checked="" type="checkbox"/> All Titles (1) <input type="checkbox"/> Books (0) <input type="checkbox"/> Journals (1) <input type="checkbox"/> Other (0)	Title	ISSN/ISBN	Type	Status
	The New York times Alt. Title: Combined New York morning newspapers	0362-4331	Journal	Tracked

Click on the hyperlinked Title (The New York times), and the system returns all locations for the newspaper:

New York times					
<input checked="" type="checkbox"/> Title Details <input type="checkbox"/> Holdings List <input type="checkbox"/> Title Metadata <input type="checkbox"/> Public Note <input type="checkbox"/> Weight	Date(s)	Database Name	Provider Name	Status	Origin
	No Dates	Campus Research: Law and News (TEST ONLY!!)	Thomson West	Not Tracked	
	No Dates	Image Edition Newspapers	NewsBank	Not Tracked	
	No Dates	National Newspaper Index	Gale	Not Tracked	
	No Dates	Nexis UK (Selected Full Text Only)	LexisNexis	Not Tracked	
	No Dates	ROSS Linking File (Test Only!!)	ProQuest	Not	

3.2. Journal Search Types

In addition to a “Title Equals” search, you can choose to run an ISSN/ISBN or “Title Begins With” search. We do not currently support “Title Contains” searching in the Client Center because of the overhead of having the full-text index available for alternate titles. This may be a future enhancement.

Note: “Title Begins With” and “Title Equals” searches require a minimum of three letters to be valid. You’ll get an error icon () if you try to search with less than three letters.

3.3. Alternate Titles

Many journals have title variations. Serials Solutions maintains alternate titles for the vast majority of e-journals by attaching title variations used by vendors and alternate titles from the CONSER record directly to our own work-level authority record. Rather than being limited to a journal’s official title, users can search the complete set of alternate titles that a journal may have, including abbreviated titles.

Opening up alternate title searching in this way may bring some results that don't quite fit with what you thought you were searching for, especially when you use single words or short word fragments.

For example, here's a search that will match hundreds of records:

e-Catalog: Title Begins With

Many of the records that show up at the top of this results set won't actually begin with "American."

e-Catalog Title Search Results				
All Titles (2869) Books (1596) Journals (1273) Other (0)		Go to Page: 1 / 26 <input type="button" value="Next"/> <input type="button" value="Previous"/>		
Title	ISSN/ISBN	Type	Status	
A D A update Alt. Title: Americans with Disabilities Act update	1071-7382	Journal	Not Tracked	
A.M.A. archives of general psychiatry Alt. Title: American Medical Association archives of general psychiatry	0375-8532	Journal	Not Tracked	
A.M.A. archives of otolaryngology Alt. Title: Archives of otolaryngology	0096-6894	Journal	Not Tracked	
A.P.A. mental hospital service bulletin Alt. Title: American Psychiatric Association mental hospital service bulletin		Journal	Tracked	
AAAS report ... research & development				

To give some context to the results for your search in cases like this one, the system returns the alternate title that your search matched. **Note:** We currently display the alternate title only when it comes directly from the MARC record rather than from vendor variations, which may include misspellings or other non-standard data.

In the example above, the first title has an alternate title that begins with the entered search string, "American," which comes from a MARC record alternate title field.

Alternate title searching includes all standard title fields from a MARC record (for most titles), including the abbreviated title from the 210 field. For example, searching on "amart" finds the same journal as searching on "American art."

3.4. Journal Search Results

The system presents journal search results in a condensed format to save space. Each journal result includes the following columns: Title, ISSN/ISBN, Type (of resource), and Status:

Home > e-Catalog Title Search Results				
e-Catalog Title Search Results				
All Titles (20) Books (3) Journals (17) Other (0)				
Title	ISSN/ISBN	Type	Status	
The women's health activist Alt. Title: The women's health activist.	1547-8823	Journal	Tracked	
Women's Health		Journal	Tracked	
Women's Health & Social Work		Book	Not Tracked	
Women's health & urban life Alt. Title: Women's health & urban life : an international and interdisciplinary journal	1499-0369	Journal	Not Tracked	
Women's Health (17455057)	1745-5057	Journal	Not Tracked	
Women's health (1986) Alt. Title: Women's health.	0884-7355	Journal	Not Tracked	
Women's health (London, England) Alt. Title: Women's health.	1745-5057	Journal	Not Tracked	

Clicking on the title in the first column displays the Title Details view. From here you can access a holdings list, metadata, and public notes for the title:

The screenshot shows the 'Title Details' view for the title 'Women's Health Activist'. On the left is a navigation menu with links: Title Details (selected), Holdings List, Title Metadata, Public Note, and Weight. The main area displays the following information:

- Serials Solutions ID: ssj0029462
- ISSN: 1547-8823
- Type: Journal
- Title: The women's health activist
- Publisher: National Women's Health Network
- Subjects: Medicine : Medicine - General; Public Health : Gender Specific Public Health : Public Health - General
- MARC Records: CONSER Neutral
- eISSN

360 MARC Updates and 360 Resource Manager clients also see the Serials Solutions ID (SSJ number) and links to the MARC records that have been associated with the journal. The MARC record reference is a link that will open up the actual MARC record in a new window. Clients that don't subscribe to these products won't see this information.

3.5. Finding Databases

Searching databases allows you to quickly find databases that you may want to add to your profile, or to review the journals available in it. You can search by "Database Name Begins With" or you can also get lists of databases by Status (for example, Subscribed, Under Review, etc.).

The screenshot shows the 'e-Catalog Database Search Results' page. At the top, there is a search bar with 'Database' selected and 'Name Begins With' set to 'Sc'. Below the search bar, there are buttons for 'Create New Database' and 'Edit Status'. The main content is a table with the following columns: Database, Status, Titles, Provider, and Collection.

Database	Status	Titles	Provider	Collection
Scandinavian Journal of Information Systems	Not Tracked	1	Information Systems Research in Scandinavia Association	
SCANfile	Not Tracked	0	Informit	
Schattauer Scientific Journals	Not Tracked	18	Schattauer Scientific Journals	
Schillers Werke	Not Tracked	0	Chadwyck-Healey	

3.6. Adding Databases

If you want to add a database:

1. Follow the steps above to search for the database.
2. Click on the database name from the search results page.
3. Next you'll see the **Database Details**. Click on the **Edit** button on the right side of the header to change the status. When the screen is editable, use the Status drop-down menu to change the status of the database from "Not Tracked" to "Subscribed."

The screenshot shows the 'Database Details' page for 'EBSCOhost :: Alt-HealthWatch'. The left sidebar shows a navigation menu with links: Database Details (selected), General, Titles (97 of 191), Books (5), Journals (92), Other (0), View Upload Status, 360 Resource Manager, Cost, and General. The main area displays the following information:

- Provider: EBSCOhost
- Titles: 97 of 191
- Status: Not Tracked (dropdown menu is open showing options: Subscribed, Under Review, Not Tracked, From Consortium)
- Display In:
- MARC-Group: ☒
- eBook collections are now available in KnowledgeWorks. Please contact us at 360@serialsolutions.com to learn

- Click on **Save** at the top to save your changes.
- To confirm that the database has been added, click on the link to Data Management Home, and you will see the database name on the list as "Subscribed."

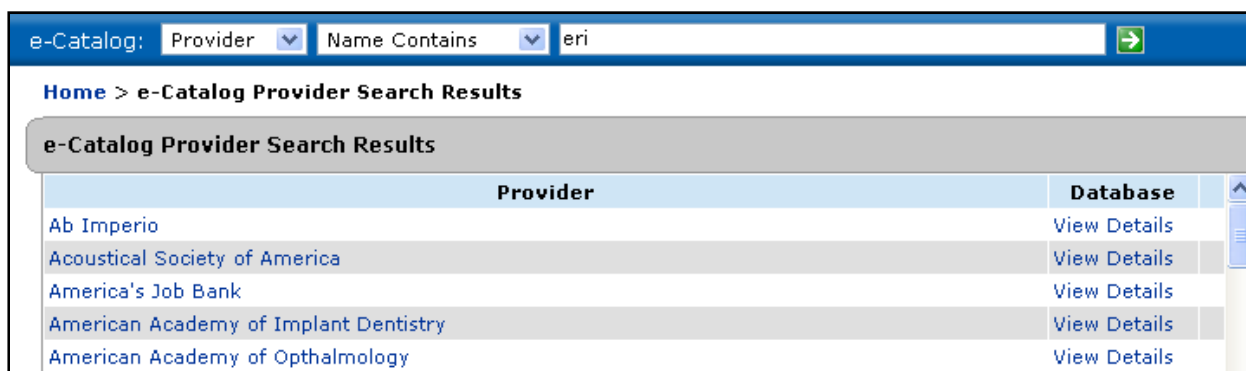
3.7. Finding Providers

The e-Catalog drop-down menu now contains a Provider option.



e-Catalog: Provider Name Begins With
Home Name Begins With Name Contains

Once you've selected to search by provider, use the second drop-down menu to search by "Name Begins With" or "Name Contains." Both require a minimum of 2 characters entered in the search field.



e-Catalog: Provider Name Contains eri

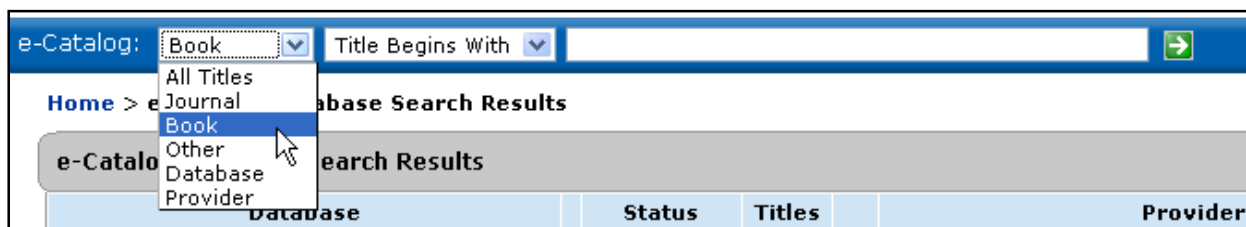
Home > e-Catalog Provider Search Results

e-Catalog Provider Search Results

Provider	Database
Ab Imperio	View Details
Acoustical Society of America	View Details
America's Job Bank	View Details
American Academy of Implant Dentistry	View Details
American Academy of Ophthalmology	View Details

3.8. Finding eBooks

The e-Catalog drop-down menu now contains a Book option:



e-Catalog: Book Title Begins With
Home > e-Catalog Database Search Results
e-Catalog Database Search Results

Database	Status	Titles	Provider
----------	--------	--------	----------

Once you've selected to search by book, use the second drop-down menu to search by "Title Begins With," "ISBN Equals," or "Title Equals."

3.9. Adding eBooks

- Follow the steps above to search for the eBook.

- Click on the appropriate title from the search results page:

e-Catalog: Book Title Begins With blue

Home > e-Catalog Title Search Results

e-Catalog Title Search Results

<ul style="list-style-type: none"> All Titles (59) <ul style="list-style-type: none"> Books (34) Journals (25) Other (0) 	Title	ISSN/ISBN	Type	Status
	Blue Aloes		Book	Not Tracked
	Blue Bird		Book	Not Tracked
	Blue Bird Winter Nest		Book	Not Tracked
	Blue Bonnet in Boston		Book	Not Tracked
	Blue Bonnet's Ranch Party		Book	Not Tracked

- On the Title Details screen, click on the name of the database:

Home > e-Catalog Title Search Results > Title Details

Blue Bird


<ul style="list-style-type: none"> Title Details Holdings List Title Metadata 	Coverage Date(s)	Database Name	Provider Name	Status
	No Dates	Project Gutenberg Online Catalog	Project Gutenberg	Not Tracked

- On the Database Details screen, click on the Edit button on the right side.
- When the screen is editable, use the drop-down menu to change the database's status from Not Tracked to Subscribed:

Collection

Provider Project Gutenberg

Titles 23734

Status Not Tracked 

- Subscribed
- Under Review
- Trial
- Subscription Declined
- License Negotiation
- Archived
- Cancelled
- Not Tracked

Default URL

Default Database Name

Now available in KnowledgeWorks. Please contact us at [redacted] to learn more about pricing details and how to your current service.

catalog/

catalog

- Click **Save** to save your changes.

Including Select Titles in Your eBooks Package

Completing the above steps adds the eBook's whole database to your collection. If you don't subscribe to all of the titles in the database, follow the steps below to include select titles only:

- Navigate to the Details screen for that database either through the Data Management Home Page or an e-Catalog search.
- On the Database Details screen, click the Edit button on the right side.

- Once the page is editable, scroll down to the Title Coverage checkbox and select "We subscribe to only some of the titles in this database:

Provider **ProQuest**
 Titles **1167**
 Status **Subscribed** ▼
 Display In: ☒ 360 Core
 eBook collections are now available in KnowledgeWorks. Please contact us at 360@serialssolutions.com to learn more about pricing details and how eBooks are integrated into your current service.
 Default URL <http://proquest.umi.com/login>
 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
 Contact Library Support if you subscribe to only some of the titles in this database.
 Default Database Name **ABI/INFORM Trade & Industry**

- Click **Save** to save your changes.

To Include Some or All Titles Again

To reverse the steps above and add all titles in that database back to your collection, or to add some, follow the steps below:

- Navigate to the Details screen for that database either through the Data Management Home Page or an e-Catalog search.
- On the Database Details screen, click the Edit button on the right side of the grey header.
- Once the page is editable, click on the link next to Titles, which should read *0 of X*.

Collection
 Provider **Project Gutenberg**
 Titles **0 of 23734**
 Status **Subscribed** ▼
 Display In: ☒ 360 Core
☒ 360 Link
☐ 360 Search
☒ 360 MARC Updates
 eBook collections are now available in KnowledgeWorks. Please contact us at 360@serialssolutions.com to learn more about pricing details and how eBooks are integrated into your current service.

- On the Titles screen, click on the **Edit Status** button on the right side:

Home > Data Management > Database Details

Annual Reviews :: Annual Reviews Edit Status Upload Download

Filter By: **Subscription Status** ▼ **All Titles** ▼ Apply

Go to Page: **1** / 2 ▶ ⏮ ⏭

Title	ISSN/ISBN	Type	Status	Date(s)	Custom Date(s)	Collection Name
Annual Review of Analytical Chemistry	1936-1327	Journal	Not Tracked	2008	2008 to Present	
Annual review of anthropology	0084-6570	Journal	Subscribed	1972	1990 to Present	
Annual Review of Astronomy	0066-4146	Journal	Subscribed	1963	1996 to Present	

5. From the drop-down menu, select Subscribed.

Filter By: **Subscription Status** **All Titles**

Subscribed

Subscribed
Under Review
Trial
Subscription Declined
License Negotiation
Archived
Cancelled
Not Tracked

Go to Page: **1** / 950

	ISSN/ISBN	Type	Status	Date(s)
		Book	Not Tracked	
		Book	Not Tracked	
<input type="checkbox"/> "Attic" Philosopher, v1		Book	Not Tracked	

6. Select the checkboxes next to all titles you want included in the collection, or select the top checkbox to select all.

Go to Page: **1** / 950

	Title	ISSN/ISBN	Type	Status	Date(s)
	!Tention		Book	Not Tracked	
	"Attic" Philosopher		Book	Not Tracked	
	"Attic" Philosopher, v1		Book	Not Tracked	
	"Attic" Philosopher, v2		Book	Not Tracked	
	"Attic" Philosopher, v3		Book	Not Tracked	
	"Shiloh" as Seen by a Private Soldier		Book	Not Tracked	

7. Click **Save** to save your changes.

4. MANAGE YOUR DATA

In the Manage Your Data section of the Client Center Home Page, you can access useful data summary and analysis tools like the Data Management Home Page, Overlap Analysis, and Usage Statistics. This chapter provides instructions on all of these tools, as well as instructions on how to use Details screens.

Resources are managed at one or more of four different levels:

1. **Provider.** This is defined as either the vendor that owns the content or the vendor that delivers access to it. Because the Client Center is primarily based on delivering access to content, the provider is usually the vendor that provides access to it. However, in some cases we may hold publisher collections that are delivered through another third-party vendor, such as Ingenta.
2. **Database.** This is the named resource to which you subscribe or want to provide access to through your Serials Solutions resource discovery tools. We use this term even when the resource isn't actually a database. For example, a publisher may provide access to two or more individual publications through its Web site, but the site isn't really a single database.
3. **Authority.** Unlike other electronic resource management companies, Serials Solutions manages e-resources at the "work level" in addition to the "holding level." That means we maintain a "work level identifier" that allows us to aggregate all formats and holdings of a unique title under the same title-level authority record. These authorities are based on the CONSER MARC records for the resource and include a uniform title, all valid ISSNs for the title, and subject headings.
4. **Holding.** A holding is the specific instance of a title within a provider's database. This is the level that holds coverage dates and access URLs.

Each of these levels has metadata that can be edited by you to customize the way the resource is handled by the system. There are two primary ways for you to navigate to a Details screen:

1. **Data Management Home Page.** Accessible from the Client Center Home Page or the Data Summary and Analysis Tools section on most pages, this is a list of all your tracked resources at the database level. See the next section for more details.
2. **The e-Catalog.** Accessible from the header of each page throughout the Client Center, you are always no more than a couple of clicks away from a Details screen when you use the e-Catalog. See the previous section for more details.

4.1. Data Management Home Page

The Data Management home page is one of two primary ways for you to navigate to a Details screen (the other is a search within the e-Catalog). Click on a Database Name to manage an individual database, a Provider name to manage all resources from a single provider, or the Titles count to manage individual titles.

Home > Data Management			
Library Databases			
Create New Database Edit Status Show All			
Go to Page: 1 / 7			
Database Name	Status	Titles	Provider
AB Print Holdings	Subscribed	10811	Library Specific Holdings
Academic OneFile	Subscribed	0 of 4882	Gale
Academic Search Premier	Subscribed	4750	EBSCOhost
AccessUN	Subscribed	0	NewsBank
AFPA CTC Communication of Research	Subscribed	344	AFPA CTC

Click on a column title (e.g., Database name, Status, Provider, Collection) to sort the list alphabetically by that subject. (Click the same column title again to sort the list reverse alphabetically.) If you have more than one page

of databases, click the blue arrows to move through the pages, or just type a page in the **Go to Page** box. You can also have one full (non-paginated) list of databases by clicking the **Show All** button.

You can get back to this page from virtually anywhere in the Client Center by clicking on the “Data Management Home” link below the header, or by clicking on the “Data Management” bread crumb link when available.

See **Managing Database Resource Status and Display** on page 17 for instructions on how to modify resource status in this list.

4.2. Details Screens

Database Level

To navigate to a Database Details screen, simply click on the database name on the Data Management Home Page, or in a database or provider search results list.

Home > Data Management

Library Databases

Create New Database Edit Status Show All

Go to Page: 1 / 7

Database Name	Status	Titles	Provider
AB Print Holdings	Subscribed	10811	Library Specific Holdings
Academic OneFile	Subscribed	0 of 4882	Gale
Academic Search Premier	Subscribed	4750	EBSCOhost
AccessUN	Subscribed	0	NewsBank
AERA SIG Communication of Research	Subscribed	244	AERA SIG

Provider Level

To navigate to a Provider Details screen, click on the provider name on the Data Management Home Page, or in a database or provider search results list.

Home > Data Management

Library Databases

Create New Database Edit Status Show All

Go to Page: 1 / 7

Database Name	Status	Titles	Provider
AB Print Holdings	Subscribed	10811	Library Specific Holdings
Academic OneFile	Subscribed	0 of 4882	Gale
Academic Search Premier	Subscribed	4750	EBSCOhost
AccessUN	Subscribed	0	NewsBank
AERA SIG Communication of Research	Subscribed	244	AERA SIG

Authority Level

To navigate to Journal Authority Metadata, search for the journal using the e-Catalog and then click on the journal name on the results page:

Home > e-Catalog Journal Search Results > Journal Metadata

ABA bank directors briefing

- Journal Metadata
- Journal Holdings List
- Public Note

Title ABA bank directors briefing

Serials Solutions ID ssj0052704

ISSN 1548-6958

Subjects

Publisher Simmons Boardman Pub., Corp.

MARC Records [Neutral](#)

eISSN

Journal Holding Level

To navigate to a Journal Holding Details screen, you can either click on the journal title on the Data Management Home Page, or use the e-Catalog to find the journal and then click on the database name in the search results. When you click on the journal name, you will be taken to the Journal Metadata view. Use the left-hand navigation tree to access the Journal Holdings List.

Home > e-Catalog Journal Search Results > Journal Metadata > Journal Holdings List

ProQuest Annual Reports

- Journal Metadata
- Journal Holdings List
- Public Note

Coverage Dates	Database Name	Provider Name	Status
01/01/1986 to present	ABI Complete (Turkish Consorti...	ProQuest	Under Review
01/01/1986 to present	ABI/INFORM Complete	ProQuest	Subscribed
01/01/1986 to present	ABI/INFORM Trade & Industry	ProQuest	Subscribed
01/01/1986 to present	PQ5000 (Turkish Consortium)	ProQuest	Not Tracked
01/01/1986 to present	PQ5000 Business (Turkish Conso...	ProQuest	Not Tracked

Navigating to the Journal Holding List

Each journal database has a journal holding list that can be used for selecting individual titles (when the database is selectable) and customizing coverage dates. To get to the list, click on the Title count on the Data Management Home page:

Library Databases

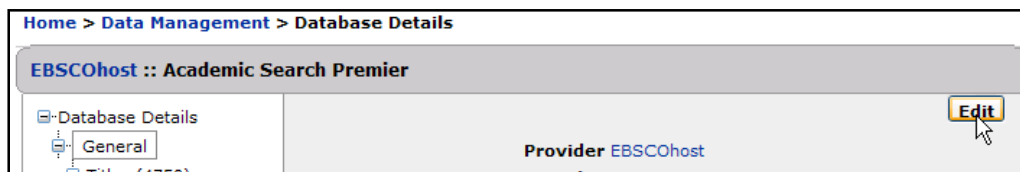
Create New Database Edit Status Show All

Go to Page: 1 / 7

Database Name	Status	Titles	Provider
AB Print Holdings	Subscribed	10811	Library Specific Holdings
Academic OneFile	Subscribed	0 of 4882	Gale
Academic Search Premier	Subscribed	4750	EBSCOhost
AccessUN	Subscribed	0	NewsBank
AEPA STC Communication of Research	Subscribed	244	AEPA STC

Opening a Details Screen for Editing

Resources at all levels can be edited by clicking the **Edit** link next to the name in the resource title bar:



4.3. Managing Database Resource Status and Display

Overview

Using the Data Management Home Page, you can choose to assign a status of either “Subscribed” or “Under Review” to include a resource in the resource list, or “Not Tracked” to remove it from the list. In addition, you can temporarily suspend the inclusion of a resource in a library’s data and patron-facing applications such as the E-Journal Portal and 360 Link.

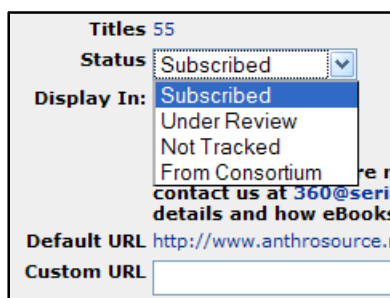
Every resource has a status: Subscribed, Under Review, Not Tracked, or From Consortium.

- Subscribed:
 - Database shows on Data Management Home Page by default as bold.
 - Database shows in overlap analysis by default.
 - Database shows in public products by default, but this can be changed with Resource Display.
 - Equal to previous "Subscribed" database status.
- Under Review:
 - Database shows on Data Management Home Page by default but not bold.
 - Database shows in public products by default, but this can be changed with Resource Display if you wish.
- Not Tracked:
 - Database does not show on Data Management Home Page.
 - Database does not show in public products.
 - Equal to previous "Unsubscribed" status.
- From Consortium
 - Same as “Subscribed, except you cannot edit most of the database details, and the database doesn’t show in overlap analysis. See **6.3 Consortium Member Library Functions** on page 66 for details.

Changing a Resource Status (Resource Page)

1. Select a resource from the list on the Data Management Home Page.
2. Click on Edit on the right side of the header.

3. Select the desired status from the drop-down menu.



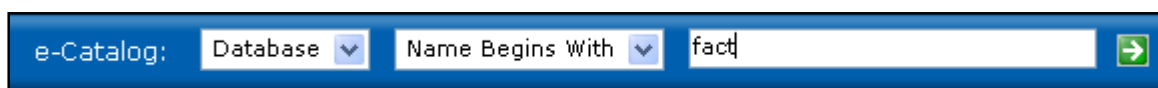
4. Click on **Save** to save, or **Cancel** to discard changes.

Note: Resource Status currently applies to database resources only, not to holdings.

Adding a Database to Your Profile

To add a resource to your profile, use the e-Catalog at the top of any page in the Client Center:

1. Choose **Database** from the drop-down menu.
2. Enter at least the beginning of the database name and click the green arrow. For example, if you want to add Factiva to your profile, you could find it with a search for “fact.”



3. Click on the appropriate database title from the results list.
4. Click the **Edit** link on the right side of the header.
5. Use the drop-down menu to change status as desired and then click on the **Save** button.

Removing a Database From Your Profile

To remove a database from your profile, use either the e-Catalog or the Data Management Home Page:

1. Click on the appropriate database name.
2. On the Database Details screen, click on Edit in the right side of the header.
3. Using the Status drop-down menu, change the status of the database to “Not Tracked.”
4. Click on Save to save your changes.

Changing Resource Display

In some cases you may want to choose whether a resource is included or excluded from your resource discovery tools. For example, you may have recently added a resource to your profile as “subscribed,” but don’t want the titles to appear in your E-Journal Portal until you’ve customized the dates. Or perhaps you want to have a database in your E-Journal Portal, but not receive MARC records for the titles. Use Resource Display to modify this behavior.

Currently there is a checkbox to choose whether database holdings show in:

- **360 Core and 360 Link.** 360 Link only appears if you subscribe to 360 Link (formerly Article Linker). 360 Core (formerly AMS) is always an option and controls holdings in both EJP and spreadsheet/XML data files.
- **360 Search.** Unchecked by default, selecting this option means the resource will appear on your 360 Search front page. Checking this does **not** add the resource as a live connection. To add a resource as a connection, contact Serials Solutions Support.

- **MARC.** This option only shows if your library receives MARC records.
- **MARC-Group.** This option only shows if your library receives group MARC records.

Default Actions:

- If a database does not show in 360 Core, it cannot show in any other product either.
- A database that gets a "Subscribed" status automatically has all applicable checkboxes checked, meaning that the database's holdings will show in all products.
- If a new product is added to a current client, such as a 360 Core client purchasing MARC records, the new display checkbox will have the same checked or unchecked state as the 360 Core checkbox for each database.

To change the display status of a resource:

1. Select a resource from the list on the Data Management Home Page.
2. Click "Edit" next to the resource name.
3. Select the applications in which you want to include the resource by checking the appropriate box.

Home > Data Management > Database Details

ProQuest :: Ethnic NewsWatch

Database Details

- General
- Titles (329)
 - Books (0)
 - Journals (329)
 - Other (0)

Code ENW

Provider ProQuest

Titles 329

Status Subscribed

Display In: ☒ 360 Core ☐ 360 Link

eBook collections are now available in KnowledgeWorks. Please contact us at 360@serialsolutions.com to learn more about pricing details and how eBooks are integrated into your current service.

Default URL <http://proquest.umi.com/login>

Custom URL

Save Cancel

4. Click the button to **Save**, or **Cancel** the changes.

4.4. Public Notes

Adding and Editing Public Notes

Public resource notes are typically used to add special instructions, such as the need for a login and password, to resource records in the E-Journal Portal. But you can use public notes to pass on other information to your users as well, such as the location of print journals in your library. Public notes can also be carried through to MARC records using the field of your choice.

Public notes can be temporarily suspended from view within the E-Journal Portal by using the "hide" feature within the public notes section of any resource.

Public Notes on the Database Index

You can add public notes to the database index that appears on the E-Journal Portal home page. These can be used for many purposes, including descriptions of the databases or access information. To add a note to a database, follow the instructions in the next two sections to either add a note to a single database or to all databases from a single provider.

Sample Library
Electronic Journals

E-JOURNAL PORTAL

[E-Journal Home Page](#) [Help](#) [Library Home Page](#)

Find e-journals by title or ISSN

Title begins with

Browse e-journals by subject

-- Please select a subject category --

Browse e-journals by title

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](#) [X](#) [Y](#) [Z](#)

Search for keywords in e-journals

- [Accessible Archives Complete](#)
- [African American Newspapers: The 19th Century](#)
- [Biochemistry, Genetics & Molecular Biology Backfile](#)
- [China Academic Journals - Agriculture \(Series D\)](#) All databases in a provider note aligned adjacent to the database.
- [China Academic Journals - Economics/Politics/Law \(Series G\)](#) All databases in a provider note aligned adjacent to the database.
- [China Academic Journals - Education/Social Sciences \(Series H\)](#) All databases in a provider note aligned adjacent to the database.

Database public notes on database index.

Adding a Note to a Journal Authority Record

Adding a note at the journal level is slightly different from doing so at the holding, database, or provider level because the only current way to get to the journal authority record is to use the e-Catalog to find the journal first.

1. To get a journal authority record, enter the journal name or ISSN in the e-Catalog search form, and click the green arrow.
2. Find the exact title that matches your request from the journal search results and click on the journal name.
3. To add a public note at the journal level, click on **Public Note** in the left-hand navigation tree.

Home > e-Catalog Journal Search Results > Journal Metadata

ABA banking journal

Journal Metadata
Journal Holdings List
Public Note

Title ABA banking journal

Serials Solutions ID ssj0000282

ISSN 0194-5947

Subjects

Publisher Published for the American Bankers Association by Simmons-Boardman Pub. Co

MARC Records [Microform](#)

eISSN

4. Click on **Edit** on the right side of the header.
5. Enter your public note in the field provided.
6. Click **Save** to save your changes.

Adding a Public Note to a Journal Holding

Journal holding notes appear next to a journal holding in E-Journal Portal results. To add them, you must select the exact instance of the journal within a specific database.

1. The quickest way to find a single journal holding is to use the e-Catalog search form at the top of any page in the Client Center. Enter the journal name or ISSN in the form and click the green arrow.
2. Find the exact title that matches your request from the journal search results and click on the journal name.
3. To add a public note at the journal holding level, click on **Journal Holdings List** from the left-hand navigation tree.

Home > e-Catalog Journal Search Results > Journal Metadata

ABA banking journal

Journal Metadata	Title	ABA banking journal
Journal Holdings List	Serials Solutions ID	ssj0000282
Public Note	ISSN	0194-5947

4. From the Journal Holdings List, select the appropriate database.

Home > e-Catalog Journal Search Results > Journal Metadata > Journal Holdings List

ABA banking journal

Journal Metadata	01/01/1987 to present	ABI/INFORM Complete	ProQuest	Subscribed
Journal Holdings List	01/01/1987 to present	ABI/INFORM Global	ABI/INFORM Complete	Subscribed
Public Note	01/01/1987 to present	ABI/INFORM Research	ProQuest	Subscribed

5. On the Database Details screen, click on **Edit** on the right side of the header.
6. Scroll down to the **Public Note** field and enter your public note.
7. Click **Save** to save your changes.

Home > Data Management > Journal Details

LexisNexis :: LexisNexis Academic :: ABA BANKING JOURNAL [Save] [Cancel]

Output 01/01/1987 - Present

Coverage Dates

Default URL <http://cisweb.lexis-nexis.com/sourceselect/returnToSearch.asp?csisrc=6923&>

Custom URL

Output URL <http://0-cisweb.lexis-nexis.com.source.unco.edu/sourceselect/returnToSearch>

Public Note

Enter your note here

☒ Display

Adding a Note to all Holdings in a Database

In some cases, you may want the same note to appear next to every holding within a single database. This is done from a **Database Details** screen:

1. From the **Data Management** home page, click on the name of the database to which you want to add a public "all journals" note. (Alternatively, you can search for the database using the e-Catalog search form at the top of the **Client Center** home page and then click on the database name in the results list.)
2. On the **Database Details** screen, click Edit on the upper right side.
3. Scroll down to the **Public All Titles Note** field and enter your public note:

Home > Data Management > Database Details

ProQuest :: ABI/INFORM Complete

Database Details

- General
- Titles (3793)
- Books (0)
- Journals (3793)
- Other (0)
- 360 Resource Manager

Provider ProQuest

Titles 3793

Status Subscribed

Display In:

- ☒ 360 Core
- ☒ 360 Link
- ☐ 360 Search

Public Database Note

☐ Display

Public All Titles Note

☐ Display

Save Cancel

4. Check the **Display** box to make your note visible to users. Please keep in mind that this is not selected by default.
5. Click **Save** to save your changes.

Frequently Asked Questions about Public Notes

1. I just entered a public note into the Client Center. When will I see it in my E-Journal Portal?

Data added in the Client Center, including public notes, shows up in your Portal the next day. The text will appear as you have entered it in the Public Notes field.

2. I want to add a hyperlink or an image to a note. Can I do this?

All public notes fields accept HTML tags, including hyperlinks and image tags. You can preview your links and images to confirm that you have entered them correctly after you have saved them on the page to which you've added the note.

3. I have added an all-databases note to a provider and an individual note to one database within that provider. What will I see?

The system uses the note available at the most granular level. That is, for journal holding notes, it first finds a note entered at the holding level, and then an all-journal note entered at the database level. For database notes, it first finds a note entered at the database level, and then for one from the provider level for all databases. In this case, all databases within the provider show the all-database note, except for the one to which you've added the individual note.

4. I see that I have the option to hide a note. Why would I want to do this?

This option allows you to hide a note from the public without erasing it from your data. So if you wish to temporarily hide a note from your patrons, but plan to use the note again in the future, you do not have to delete and rewrite the note.

5. I added a holding note and noticed that my results look slightly different. All holdings show on separate lines. Why is this?

Holdings that had the same date range on the E-Journal Portal results page originally showed on the same line. However, due to the fact that holdings notes show directly adjacent to the holding, two holdings could no longer be on the same line.

6. Can I add public notes to 360 Link results?

Yes, and public notes in 360 Link results are different from notes in your E-Journal Portal. See the 360 Link User Guide in the Support Center for details.

4.5. Custom Coverage Dates

Although Serials Solutions tracks most full-text e-resources, including the coverage dates of the journals, in some cases your library may have dates that differ from other libraries. That's why the system supports full date customization, including true date inheritance capability that saves data entry time in many cases.

Customizing Dates at the Database Level

Adding custom dates at the database level means every journal within the database will have the same dates, regardless of what the default date is at the journal holding level. However, you can override custom database dates by entering a custom date at the journal holding level.

To add custom dates at the database level:

1. Search for the database using the e-Catalog.
2. Click on the appropriate database name from the database search results.
3. On the Database Details screen, click on **Edit** on the right side of the header.
4. Scroll down to the Custom Coverage Dates, and enter your start and end dates in the fields provided.
5. Click on **Save** to save your changes.

The screenshot shows the 'ProQuest :: ProQuest Agriculture Journals' database details page. The left sidebar contains a tree view with 'Database Details' expanded, showing 'General', 'Titles (229)', '360 Resource Manager', 'Administration', 'Contacts', 'Cost', 'General', 'Licensing', and 'Notes'. The main content area has a 'Database Description' field and a 'Long Database Description' field. Below these, the 'Custom Coverage Dates' section is highlighted with a red oval, containing 'Custom Coverage Date From' and 'Custom Coverage Date To' input fields. At the top right of the main content area are 'Save' and 'Cancel' buttons.

How Database Date Constraining Works

When you enter custom dates at the database level, the default coverage dates are automatically constrained by the system only when logical. For example, if the custom start date is 1995 and the title is actually only available beginning in 1998, the system uses the actual start date, not the custom one.

Look at this example from ScienceDirect that has a custom start date of 1995:

<input checked="" type="checkbox"/>	Acta Astronautica	0094-5765	1995 to Present
<input checked="" type="checkbox"/>	Acta Biomaterialia	1742-7061	01/01/2005 to Present
<input checked="" type="checkbox"/>	Acta histochemica	0065-1281	01/01/2000 to Present
<input checked="" type="checkbox"/>	Acta Materialia	1359-6454	01/01/1996 to Present
<input checked="" type="checkbox"/>	Acta metallurgica	0001-6160	...excluded...
<input checked="" type="checkbox"/>	Acta metallurgica et materialia	0956-7151	1995 to 12/31/1995
<input checked="" type="checkbox"/>	Acta Oecologica	1146-609X	02/01/1998 to Present
<input checked="" type="checkbox"/>	Acta Psychologica	0001-6918	1995 to Present

The default start dates of those same holdings are:

<input checked="" type="checkbox"/>	Acta Astronautica	0094-5765	02/01/1974 -
<input checked="" type="checkbox"/>	Acta Biomaterialia	1742-7061	01/01/2005 -
<input checked="" type="checkbox"/>	Acta histochemica	0065-1281	01/01/2000 -
<input checked="" type="checkbox"/>	Acta Materialia	1359-6454	01/01/1996 -
<input checked="" type="checkbox"/>	Acta metallurgica	0001-6160	01/01/1953 - 12/31/1989
<input checked="" type="checkbox"/>	Acta metallurgica et materialia	0956-7151	01/01/1990 - 12/31/1995
<input checked="" type="checkbox"/>	Acta Oecologica	1146-609X	02/01/1998 -
<input checked="" type="checkbox"/>	Acta Psychologica	0001-6918	12/01/1936 -

In this case, Acta Metallurgica would be excluded from your library's collection because coverage ended in 1989, which is before the custom start date of 1995. In other cases, such as Acta Oecologica, the start date doesn't change because actual coverage began after the custom start date.

Adding Custom Dates to Journal Holdings

Adding custom coverage dates at the journal holding level means that only that specific journal will have the coverage dates that you enter. Custom journal holding dates override any coverage date set at the database level.

To add or edit custom coverage dates for journal holdings:

1. Search for the journal title using the e-Catalog.
2. Click on the appropriate journal from the Journal Search Results.
3. Click on **Journal Holdings List** from the left-hand navigation tree.
4. Click on the appropriate database name from the Journal Holdings List.
5. Click on **Titles** from the left-hand navigation tree.

6. Click on the **Customize Dates** button on the right side of the header:

Home > Data Management > Database Details

ProQuest :: ABI/INFORM Global Edit Status Customize Dates

Database Details

General

Titles (1895)

360 Resource Manager

Administration

Contacts

Cost

General

Licensing

Notes

Title Begins With Go

Page: 1 of 76 Go to Page: 1 2 3 4 5 6 7 8 9 10 >

Title	Status	ISSN	Dates	Custom Dates	Collection Name
AACE INTERNATIONAL TRANSACTIONS	Subscribed	1528-7106	07/13/1997 -		
ABA Bank Compliance	Subscribed	0887-0187	10/01/1994 -		
ABA BANK MARKETING	Subscribed	1539-7890	07/01/2001 -		
ABA journal	Subscribed	0747-0088	02/01/1988 - 11/30/1990, 01/01/1992 -		

7. Enter dates in the date fields provided.
8. Click **Save** to save your changes.

Home > Data Management > Database Details

ProQuest :: ABI/INFORM Global Save Cancel

Database Details

General

Titles (1895)

360 Resource Manager

Administration

Contacts

Cost

General

Licensing

Notes

Customize Dates

AACE INTERNATIONAL TRANSACTIONS

Start Date:

End Date:

ABA Bank Compliance

Start Date:

End Date:

ABA BANK MARKETING

Start Date:

End Date:

Acceptable Date Formats

The preferred format for fixed dates is **MM/DD/YYYY** (e.g., 04/09/2007 for April 9, 2007), but see the tables below for other accepted formats. Only formats in the following tables are accepted, so please let us know if you think a particular format should be supported that is not currently on the list:

Exact Dates	Example (enter exactly as shown here)	Displays As ...
MM/D/YYYY	04/9/2007	04/09/2007
M/D/YYYY	4/9/2007	04/09/2007
MM-DD-YYYY	04-09-2007	04/09/2007
MM-DD-YY	04-09-07	04/09/2007
MM-D-YYYY	04-9-2007	04/09/2007
M-D-YYYY	4-9-2007	04/09/2007
YYYY	2007	01/01/2007
MM.DD.YYYY	04.09.2007	04/09/2007
MM.DD.YY	04.09.07	04/09/2007
YYYY-MM-DD	2007-04-09	04/09/2007
Winter/Spring/Summer/Fall YYYY	Spring 2007	Spring 2007 [but system tracks it as 03/21/2007]
First/Second/Third/Fourth Quarter YYYY	Second Quarter 2007	Second Quarter 2007 [but system tracks it as 04/01/2007]

Relative Dates*	Example (enter exactly as shown here)
Last calendar year	Last calendar year
Current calendar year	Current calendar year
Current month	Current month
Current week	Current week
Current issue	Current Issue
1 day/week/month/year ago	1 week ago
x days/weeks/months/years ago (x>1)	2 days ago
x calendar years ago (x>1)	2 calendar years ago
Present	Present

* Relative dates are those that change based on the day on which they are viewed. You can combine relative dates for both start and end dates, such as "last calendar year to present."

4.6. Library-Managed Holdings

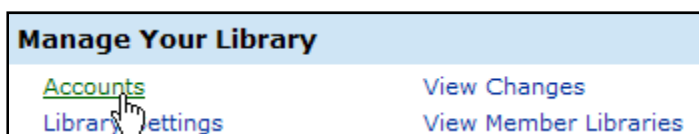
Library-Managed Holdings is a feature accessible from the Data Management Home Page that allows you to create and edit unlimited local (library-specific) holdings databases for your library, upload and download holdings databases using tab-delimited text files, and add and delete individual titles in local holdings databases, all without relying on Serials Solutions Library Support.

Setting up Permissions

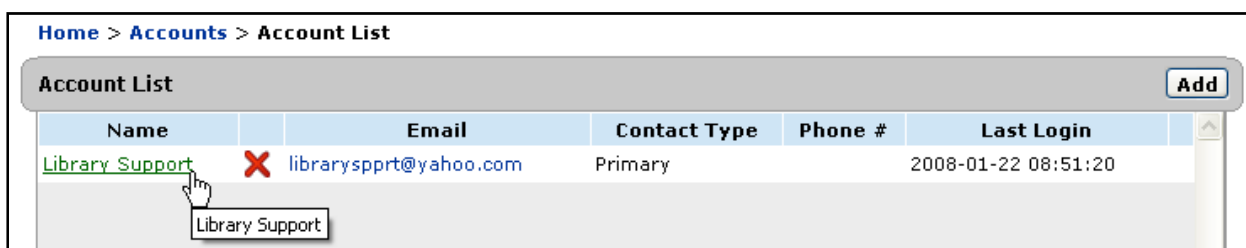
In order to access the Library-Managed Holdings buttons in the Client Center, your permissions must be set to View/Edit. If you only have View permissions, the necessary buttons will not appear.

To check and change your permissions:

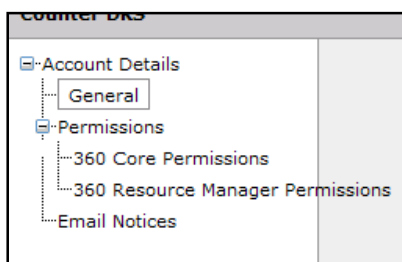
1. From the **Client Center Home Page**, under **Manage Your Library**, click **Accounts**:



2. From your **Account List** screen, click on the name of the appropriate account:



3. On the **Account Details** screen, click **360 Core Permissions** in the left-hand navigation tree:



- Click the **Edit** button in the upper right.
- Find Local Holdings Management at the bottom of the list. In the drop-down menu next to it, select **View/Edit**:

Home > Accounts > Account Details

Counter DRS [Save] [Cancel]

Account Details

- General
- Permissions
 - 360 Core Permissions
 - 360 Resource Manager Permissions
 - Email Notices

Statistics Tools [View]

360 Link Customization [View/Edit]

Data Management [View/Edit]

Data On Demand [View/Edit]

Date Format [View/Edit]

E-Journal Portal Customization [View/Edit]

Library Accounts [View/Edit]

Library Information [View/Edit]

Local Holdings Management [None] [View] [View/Edit]

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- Click **Save** on the right side of the header to save your changes.

Creating a New Library-Specific Database

- From the **Data Management** home page, click **Create New Database**:

Home > Data Management

Library Databases [Create New Database] [Edit Status] [Show All]

Go to Page: 1 / 7

Database Name	Status	Titles	Provider
AB Print Holdings	Subscribed	385	Library Specific Holdings
Academic OneFile	Subscribed	1 of 4882	Gale
Academic Search Premier	Subscribed	4750	EBSCOhost

- On the **New Library-Specific Database** editing screen, enter the appropriate information into the fields provided:

Home > Data Management > New Library Specific Database

New Library Specific Database [Save] [Cancel]

Provider Library Specific Holdings

Database Name [Text Field]

Custom Database Name [Text Field]

Status [Subscribed]

Display In

- ☒ 360 Core
- ☒ 360 Link
- ☐ 360 Search

Default URL [Text Field]

Library Proxy ☐ Omit proxy from this database

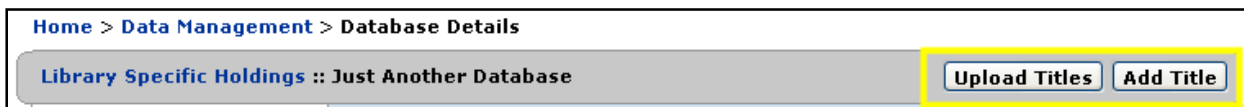
Title Coverage ☐ We subscribe to only some of the titles in this database

Database Description [Text Field]

Long Database Description [Text Field]

Please note:

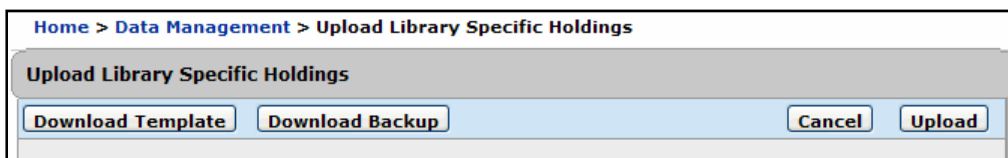
- **Provider** is always set to “Library-Specific Holdings”;
 - **Database Name** is the only required field, and can be anything;
 - **Database Name** field has a limit of 200 characters;
 - **Display In** field is checked by default for 360 Core and 360 Link (although you can deselect them; and
 - The database URL for the Default URL field must be fully formed.
3. When you are finished, click **Save** to save your changes.
 4. You will be taken to the **Database Journal Details** screen. From here you can either Upload Titles or add an individual title.



Uploading Multiple Titles to a New Library-Specific Database

1. From the **Database Journal Details** screen (see steps above), click **Upload Titles** on the right side of the header.

You will be taken to the **Upload Library-Specific Holdings** screen. From here, click **Download Template** to save a database template:

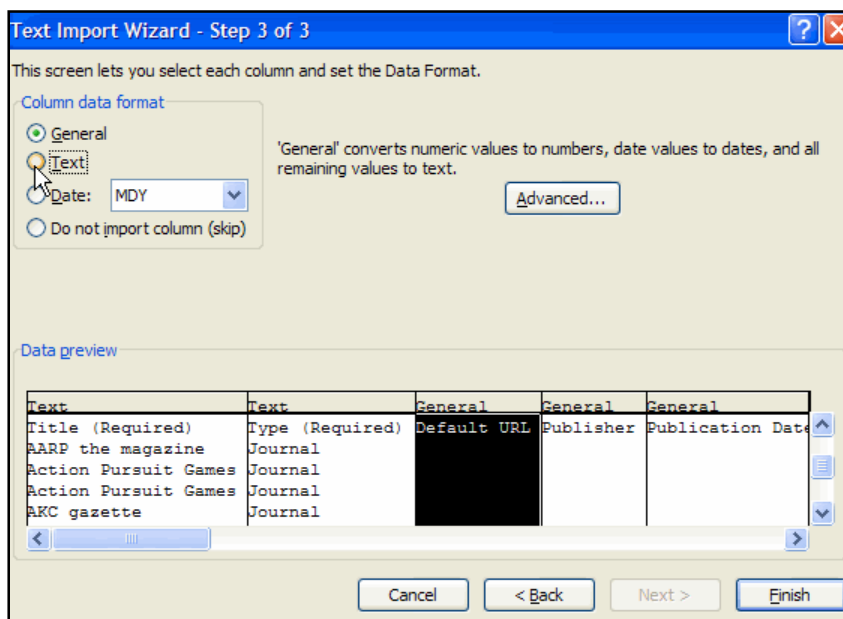


Note: If there are already some titles included in this database, a **Download Backup** button will also be available. Instead of using the rest of these “New Database” instructions, you should go to **Updating Your Library-Specific Holdings Database**, below.

2. The template is a text document with columns provided (data is separated by tabs). You can enter your data into the file using any kind of text editor; if you do that, skip to Step 4 below.

- Alternatively, if you prefer to enter your data in a spreadsheet, you can open a spreadsheet application, such as Microsoft Excel, and open your text file from within the application. (You may need to change "Files of type ..." to **All Files** in order to see the text file.)

If you use Excel, it will start the **Text Import Wizard**. Accept all the default suggestions (i.e., it's a delimited file, importing from row 1, and the delimiter is a Tab), until you get to the step that allows you to select the data format for each column. Here you need to change the default: Each column must be imported in **Text** format, not **General**:

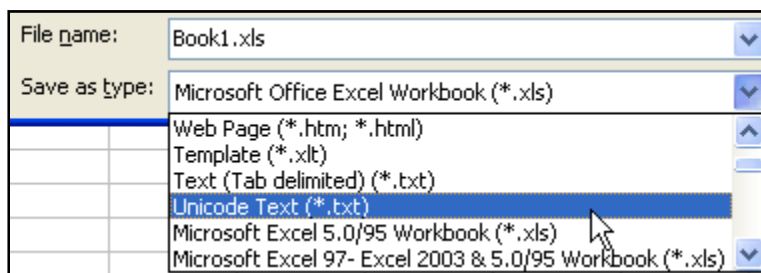


- When you add new titles to the file, each title gets its own row (line), with the different columns available for all the information about that title. The only columns that *must* be filled are the Title column and the Type column. The Type column should contain either "Journal" or "Book," and the column won't even show up unless you subscribe to the 360 Core: eBooks service.

Note: If you want to add titles with Japanese characters, you may use the two right-most columns (Language ID and Alphabetization) to indicate how the titles should be sorted. See **Japanese Alphabetization in E-Journal Portal** (in the Support Center) for details.

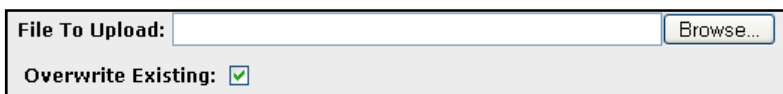
- After adding all the new titles, save the file as a text document (.txt) again.

Note: If your file contains any titles that have non-Latin characters, you must save the file as a Unicode text document (.txt):



- Back on the **Upload Library-Specific Holdings** page, use the **Browse** button to locate the file you have saved to your computer.

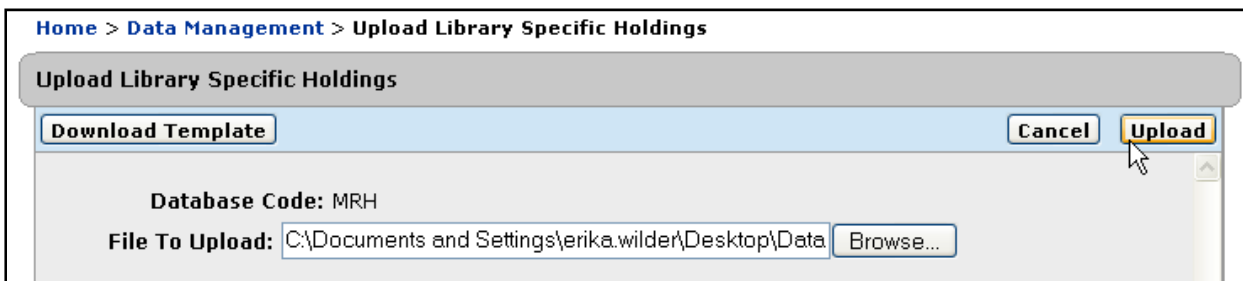
- Before uploading, notice that there is an **Overwrite Existing** checkbox below the **File To Upload** field. The box is selected by default, meaning your newly uploaded file will automatically overwrite any existing files. If you do not want it to overwrite, but rather be added to any existing files, uncheck this box:



File To Upload: Browse...

Overwrite Existing: ☒

- Once you have selected the file, click **Upload** on the right side of the header:



Home > Data Management > Upload Library Specific Holdings

Upload Library Specific Holdings

Download Template Cancel Upload

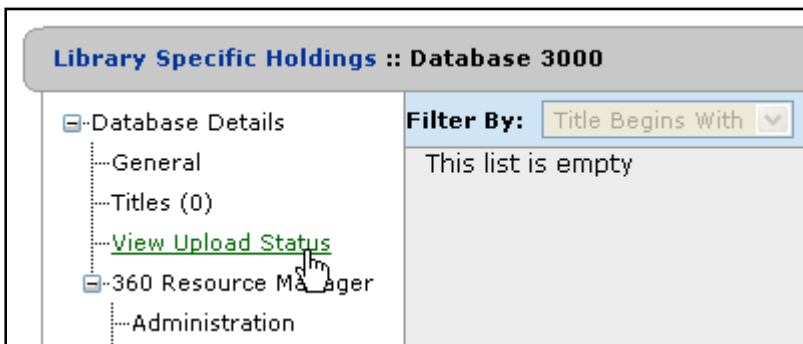
Database Code: MRH

File To Upload: C:\Documents and Settings\erika.wilder\Desktop\Data Browse...

- You will see a pop-up window confirming that the file has been uploaded. Please note that this does not necessarily mean that the file has been successfully imported. Click **OK**.
- Shortly following the pop-up, you will receive an email message confirming the receipt of your files. The message will also inform you if errors have occurred. Proceed to the next step, **Viewing Your Upload Status**, for more information.

Viewing Your Upload Status

- Once you have uploaded your database (see steps above), you should check on the status to make sure it has imported successfully and to view any potential warnings or errors. From the **Database Details** screen for your new database, click on the **View Upload Status** link in the left-hand navigation tree.



Library Specific Holdings :: Database 3000

Database Details


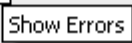
- General
- Titles (0)
- View Upload Status
- 360 Resource Manager
- Administration

Filter By: Title Begins With

This list is empty



- The **Upload Status** row will indicate if the overall import was a success or a failure:

Date DB Created 1/18/2008 12:57:13 PM
File Name DatabaseTemplate-3.txt
Time File Uploaded 1/18/2008 1:01:24 PM
Uploaded By erika.wilder@serialssolutions.com
Upload Status Failure
Show Errors [Show Errors](#)

If it failed, click the **Show Errors** link below it to view your errors. If it was successful, you may or may not see a **Show Errors** link. If that link is there, this means there are warnings. Warnings are issues that occurred with your file that did not affect its import, but that you may want to look at and, possibly, correct

- The **Upload Status Errors** screen pops up as a separate window. Actual errors (issues that caused the import to fail) are highlighted in red. Warnings are highlighted in yellow and are only provided in case you want to change something and upload again. An explanation of the error codes can be found in the **Library-Managed Holdings: Upload Status Errors** (below).

Upload Status Errors			
Error =			
Warning =			
Error	Line #	Column Name	Column Error
Too many columns on this line	2		

Updating Your Library-Specific Holdings Database

- Click on the number of titles for your library-specific holdings database, either from the **Data Management** home page or from the **Titles** link in the left-hand navigation tree of the Database Details page:

Home > Data Management

Library Databases

Create New Database Edit Status Show All

Go to Page: 1 / 7

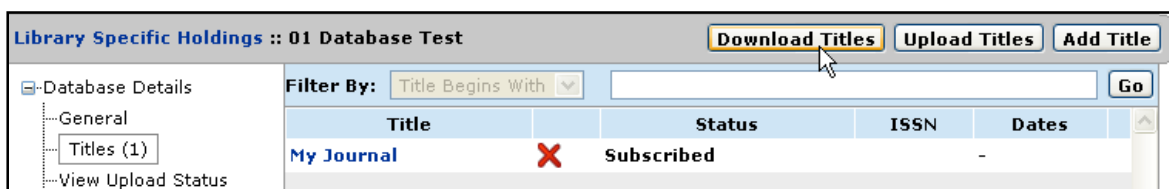
Database Name	Status	Titles	Provider
19th Century U.S. Newspapers	Subscribed	22 of 665	Gale
AB Print Holdings	Subscribed	385	Library Specific Holdings
ABI/INFORM Complete	Subscribed	3759	ProQuest

Home > Data Management > Database Details

Library Specific Holdings :: AB Print Holdings

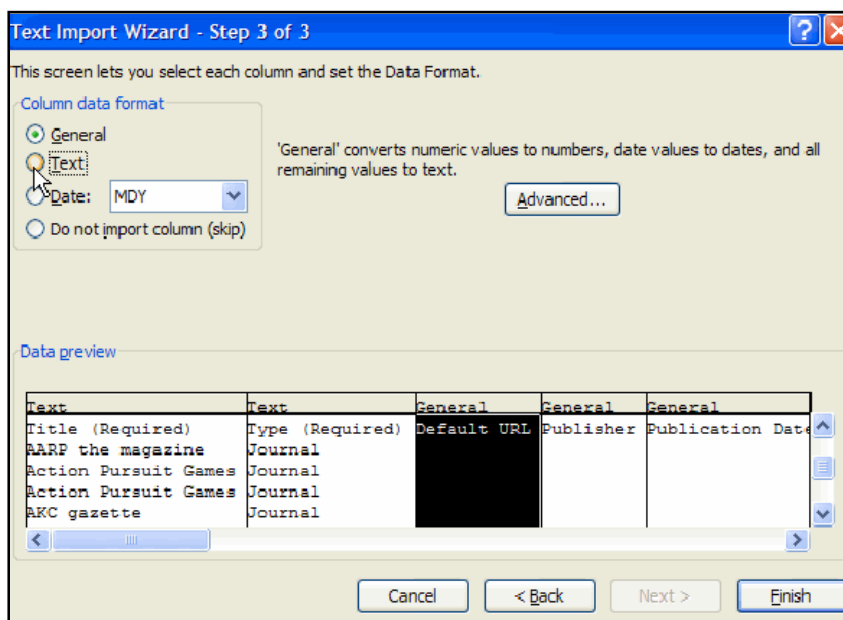
Database Details	
General	
Titles (385)	
Books (0)	
Journals (385)	
Other (0)	
View Upload Status	

- On the **Database Details** screen, click on the **Download Titles** button in the right side of the header.



- Save this text file to your computer.
- The file is a text document with columns provided (data is separated by tabs). You can enter your data into the file using any kind of text editor; if you do that, skip to Step 6 below.
- Alternatively, if you prefer to enter your data in a spreadsheet, you can open a spreadsheet application, such as Microsoft Excel, and open your text file from within the application. (You may need to change "Files of type ..." to **All Files** in order to see the text file.)

If you use Excel, it will start the **Text Import Wizard**. Accept all the default suggestions (i.e., it's a delimited file, importing from row 1, and the delimiter is a Tab), until you get to the step that allows you to select the data format for each column. Here you need to make a change: Each column must be imported in **Text** format, not **General**:

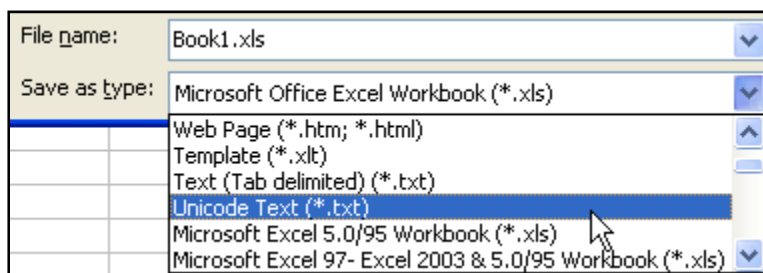


- When you add new titles to the file, each title gets its own row (line), with the different columns available for all the information about that title. The only columns that must be filled are the Title column and the Type column. The Type column should contain either "Journal" or "Book," and the column won't even show up unless you subscribe to the 360 Core: eBooks service.

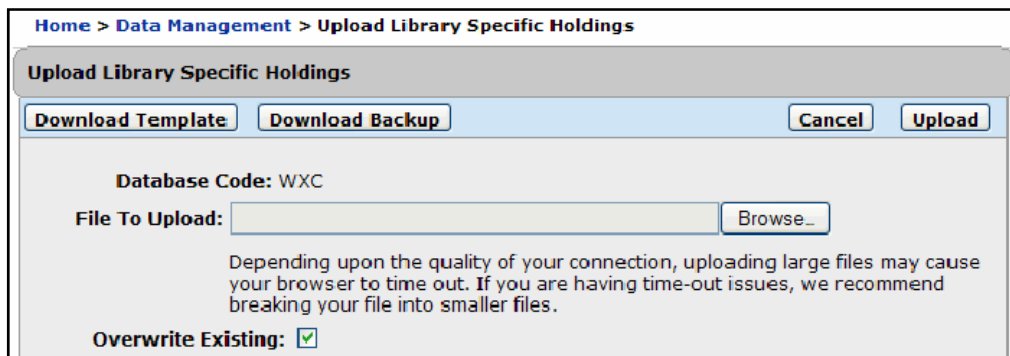
Note: If you want to add titles with Japanese characters, you may use the two right-most columns (Language ID and Alphabetization) to indicate how the titles should be sorted. See **Japanese Alphabetization in E-Journal Portal** (in the Support Center) for details.

- After adding all the new titles, save the file as a text document (.txt) again.

Note: If your file contains any titles that have non-Latin characters, you must save the file as a Unicode text document (.txt):



8. Back at the **Upload** screen, notice that there is a **Download Backup** button:



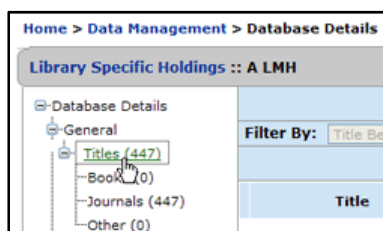
If you didn't save an unchanged copy of the Titles file you downloaded, we recommend you download a backup copy and save it somewhere in case you need to revert to a previous version.

9. Also notice the **Overwrite Existing** checkbox below the **File To Upload** field. The box is selected by default, meaning your newly uploaded file will automatically overwrite any existing files. If you do not want it to overwrite, but rather be added to any existing files, uncheck this box
10. Once you have Browsed to the file, click **Upload** on the right side of the header.
11. You will see a pop-up window confirming that the file has been uploaded. Please note that this does not necessarily mean that the file has been successfully imported. Click **OK**.
12. Shortly following the pop-up, you will receive an email message confirming the receipt of your files. The message will also inform you if errors have occurred. Go to **Viewing Your Upload Status** (above) for more information.

Adding Individual Titles to Your Library-Specific Holdings Database

The following steps are used to add individual titles to your library-specific holdings database. If you want to add many titles at once, use the instructions for **Uploading Multiple Titles to a New Library-Specific Holdings Database** (above) or, if it isn't a new library-specific database, use the instructions for **Updating Your Library-Specific Holdings Database** (above).

1. Click on the number of titles for your library-specific holdings database, either from the **Data Management Home Page** or from the **Titles** link in the left-side navigation tree of the **Database Details** page:



- On the **Titles** page, click **Add Title**.

- Enter the appropriate information into the fields provided. The fields change slightly depending whether you select **Type** as Book or Journal. ("Book" Type is only available to subscribers of **360 Core: eBooks**.) The only required field is the **Title** field:

- Click **Save** to save your changes.

Deleting Titles From Your Library-Specific Holdings Database

The following instructions are used to delete individual titles from your library-specific holdings database. If you want to delete many titles at once, use the instructions for **Updating Your Library-Specific Holdings Database** (above).

- Click on the number of titles for your library-specific holdings database, either from the Data Management Home Page or from the Titles link in the left-side navigation tree.
- Click on the red **X** next to the title you want to delete:

- When asked to confirm deletion of the title, click **Delete** to confirm or **Cancel** to cancel deletion.

Library-Managed Holdings: Upload Status Errors

The table below includes all possible errors that could occur after uploading a file with the library-managed holdings system, listed in alphabetical order:

Error Message	Meaning and Suggested Action
{Alphabetization} Invalid Alphabetization String	<p>If the Language ID field has "JA" then there must be at least one character of hiragana or katakana in the Alphabetization field.</p> <p>The report is accepted, but the alphabetization information in the row (line) where the error occurred is deleted.</p>
{Date} was not recognized as a date	<p>The system expects dates to be in the MM/DD/YYYY format. However, any date formatted in an acceptable form (see Section 4.5 Custom Coverage Dates, on page 23) will be properly handled by the system, and exact dates will be converted to the MM/DD/YYYY format. Any date formatted in an unacceptable form won't be recognized as a date by the system; it will be saved with the file, but the system won't treat it as a real date.</p> <p>The report is accepted.</p>
{ISBN}: Bad ISBN Checksum	<p>ISBN is properly formatted except for its checksum. Double-check the ISBN to make sure it is correct.</p> <p>The report is accepted.</p>
{ISSN}: Bad ISSN Checksum	<p>ISSN is properly formatted except for its checksum. Double-check the ISSN to make sure it is correct.</p> <p>The report is accepted.</p>
{LanguageID} Invalid Language ID	<p>At this time, the Language ID column must either have "JA" (for Japanese) or be empty. Also, if the Language ID is "JA" then the title must have at least one character of kanji, hiragana, or katakana.</p> <p>The report is accepted, but the alphabetization information in the row (line) where the error occurred is deleted.</p>
Bad column header	<p>The system was not able to parse a list of columns or couldn't get a list of column headers by tab-separating. Review the report and ensure it is tab-separated.</p> <p>The report is rejected.</p>

Error Message	Meaning and Suggested Action
Book is not a valid value for Type. Row was not uploaded.	<p>If your library does not subscribe to 360 Core: eBooks, then you don't need a column with the "Type" header. However, if you do include that column, those fields must either contain "Journal" or they must be empty.</p> <p>The report is accepted, but the row (line) where the error occurred is deleted.</p>
Book-specific columns are ignored for journals.	<p>If the Type field has "Journal" for a particular row, then any field specific to books (e.g., ISBN, Author, etc.) are ignored and not saved.</p> <p>The report is accepted.</p>
Control characters found and removed	<p>Control characters are not allowed in any fields.</p> <p>The report is accepted.</p>
Different alphabetization already exists. Value did not change.	<p>Someone else (either Serials Solutions or another library) has already set the alphabetization for that title and it is different than what you tried to set. (You can avoid this by downloading the latest version of your library-managed holdings; see Uploading Holdings in Section 4.6 Library-Managed Holdings on page 27.) Contact Library Support Services if you think the current Alphabetization is in error.</p> <p>The report is accepted, but the alphabetization information in the row (line) where the error occurred is deleted.</p>
Different language ID already exists. Value did not change.	<p>Someone else (either Serials Solutions or another library) has already set the Language ID for that title and it is different than what you tried to set. (You can avoid this by downloading the latest version of your library-managed holdings; see Uploading Holdings in Section 4.6 Library-Managed Holdings on page 27.) Contact Library Support Services if you think the current Language ID is in error.</p> <p>The report is accepted, but the alphabetization information in the row (line) where the error occurred is deleted.</p>
Duplicate column header	<p>Duplicate entries were found in column header. Review the report and eliminate duplicates.</p> <p>The report is accepted, but the row (line) where the error occurred is deleted.</p>
Embedded HTML detected and removed	<p>HTML tags have been found and stripped out.</p> <p>The report is accepted.</p>

Error Message	Meaning and Suggested Action
Encountered unexpected error updating alphabetization value	<p>Some other error occurred regarding alphabetization. Either upload the file again, or download the latest version of your library-managed holdings (see Uploading Holdings in Section 4.6 Library-Managed Holdings on page 27).</p> <p>The report is accepted, but the alphabetization information in the row (line) where the error occurred is deleted.</p>
Exceeded maximum length for {this field}. Truncating to {X} characters	<p>Each field has a maximum character length:</p> <p>Title: 256</p> <p>ISSN, ISBN, ISBN13: 50</p> <p>Coverage Date: 500</p> <p>Publisher: 200</p> <p>Publication Date: 256</p> <p>Edition: 50</p> <p>Default URL: 2000</p> <p>Author, Editor: 200</p> <p>Public Note, Location Note: 500</p> <p>If you don't want the system to truncate the field automatically, you'll need to edit the entry down to the maximum character length and upload the file again.</p> <p>The report is accepted.</p>
File contains no data	<p>File contains a header but no other data. Review the report and ensure data is entered before loading.</p> <p>The report is rejected.</p>
File is empty	<p>File contains no headers and is all empty. Review the report and ensure data is entered before loading.</p> <p>The report is rejected.</p>
Header contains no known columns	<p>The system found a list of columns (headers) but none were recognized.</p> <p>The report is rejected.</p>
Invalid characters found and removed	<p>Invalid characters include “#” (number sign), “^” (caret symbol), and “*” (asterisk).</p> <p>The report is accepted.</p>

Error Message	Meaning and Suggested Action
Invalid file header	<p>The system was not able to find anything at the beginning of the file that looks like the required list of columns.</p> <p>The report is rejected.</p>
Invalid ISBN	<p>An ISBN10 must have 10 characters, the last one must be an "X", but the system doesn't care where (or if) there are hyphens. An ISBN13 must have 13 characters, although the system doesn't care where (or if) there are hyphens.</p> <p>The report is accepted, but the row (line) where the error occurred is deleted.</p>
Invalid ISSN	<p>An ISSN must have 8 characters, although the system doesn't care where (or if) there are hyphens.</p> <p>The report is accepted, but the row (line) where the error occurred is deleted.</p>
Invalid Type	<p>The only authorized entries for the type column are "Book" and "Journal."</p> <p>The report is accepted, but the row (line) where the error occurred is deleted.</p>
Journal-specific columns are ignored for books.	<p>If the Type field has "Book" for a particular row, then any field specific to journals (e.g., ISSN, coverage dates, etc.) are ignored and not saved.</p> <p>The report is accepted.</p>
Missing Language ID	<p>The Language ID field cannot be empty if the Alphabetization field is not empty.</p> <p>The report is accepted, but the alphabetization information in the row (line) where the error occurred is deleted.</p>
Missing required column header	<p>A required column is missing. (The Title column is required for all library-managed holdings files, as is the Type column for 360 eBook subscribers.)</p> <p>The report is rejected.</p>
No text present in column header	<p>A column header was found with no text entered. All columns need text with known headers.</p> <p>The report is accepted.</p>
Not enough columns on this line	<p>A line of the file has fewer columns of data than the number of column headers. Review columns.</p> <p>The report is accepted, but the row (line) where the error occurred is deleted.</p>

Error Message	Meaning and Suggested Action
The {DateStart} is after {DateEnd}	Inversed start/end dates were found. The report is accepted.
Title cannot be empty	Title value contains no data. Review your Title column. The report is accepted, but the row (line) where the error occurred is deleted.
Too many columns on this line	A line of the file has more columns of data than the number of column headers. Review columns. The report is accepted, but the row (line) where the error occurred is deleted.
Too many errors detected. Please verify your file	After the system detects a certain number of errors, it rejects the entire report. The report is rejected.
Type field is required	If your library subscribes to 360 Core: eBooks, then you must have a column with the header "Type" and every row must have an entry in that column (either "Book" or "Journal"). The report is accepted, but the row (line) where the error occurred is deleted.
Unknown column header	A non-empty column was found that is not on the list of columns we process. The report is accepted.
URL is invalid.	URL entered is not a valid, fully-qualified URL. This could include no http:// prefix, etc. Review your URL column. The report is accepted, but the row (line) where the error occurred is deleted.

4.7. Offline Date and Status Editor

The Client Center's Offline Date and Status Editor allows you to quickly update title status or custom date information for your library. Using the following steps you can download title lists from any of your subscribed databases, edit that data offline, and reload it into the system.

Please note that to successfully complete the steps below you must confirm that

- You have "Edit" access in the Client Center; and
- Your chosen database has been made "selectable" – that is, you have selected the checkbox in the database details that says, "We subscribe to only some of the titles in this database."

- From the Client Center home page, click on **Data Management**.



- From the **Data Management** home page, find the appropriate database and click on the corresponding Titles link.

Library Databases			
Create New Database Edit Status Show All			
Go to Page: 1 / 7			
Database Name	Status	Titles	Provider
AB Print Holdings	Subscribed	10811	Library Specific Holdings
Academic OneFile	Subscribed	0 of 4882	Gale
Academic Search Premier	Subscribed	4750	EBSCOhost
AccessUN	Subscribed	0	NewsBank
AERA SIG Communication of Research	Subscribed	244	AERA SIG

- On the Database Details screen, use the **Filter By** options at the top of the list to view the exact list you plan to download, and click the **Apply** button.



- Click the Download button on right-hand side to download the text file. Save the file to your computer instead of opening it from here.

Home > Data Management > Database Details

ACM Digital Library :: ACM Digital Library

UploadDownload

Apply

Database Details

General

Titles (438)

Books (0)

Journals (438)

Other (0)

360 Resource Manager

Administration

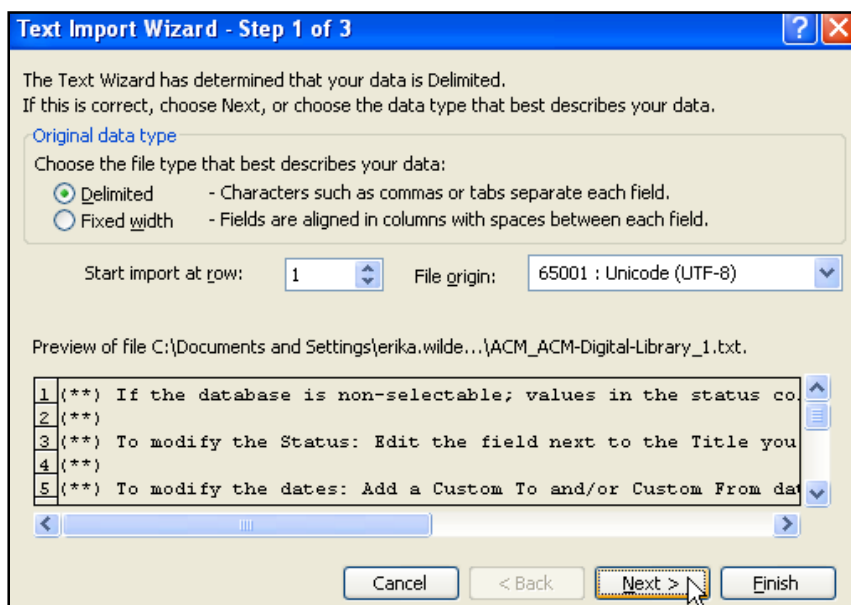
Filter By: Title Begins With

Go to Page: 1 / 18

Title	ISSN/ISBN	Type	Status	Date(s)	Custom Date(s)	Collection Name
3C on-line	1078-2192	Journal	Subscribed	10/01/1994 - 10/01/1997		
3D technologies for the World Wide Web		Journal	Subscribed	1995		
ACL: Annual Meeting of the ACL		Journal	Subscribed	1979 - 2003		

- Once you've saved that file, open Microsoft Excel (or a similar spreadsheet application). Within Excel, open the file you just saved, using the File menu. This opens the Text Import Wizard, which you need to use to handle this text file. Please note that the only way to get to the Text Import Wizard is to open Excel first, and open your file within Excel.

6. On Step 1 of the Text Import Wizard screen, ensure that the data type selected is Delimited. Click **Next**:



The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

☒ Delimited - Characters such as commas or tabs separate each field.
☐ Fixed width - Fields are aligned in columns with spaces between each field.

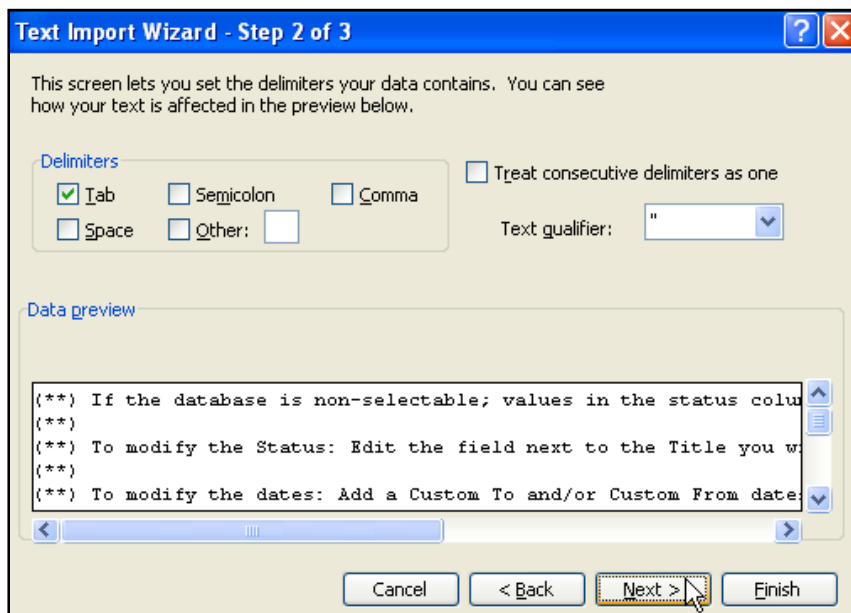
Start import at row: 1 File origin: 65001 : Unicode (UTF-8)

Preview of file C:\Documents and Settings\erika.wilde...\ACM_ACM-Digital-Library_1.txt.

```
1 {**} If the database is non-selectable; values in the status co
2 {**}
3 {**} To modify the Status: Edit the field next to the Title you
4 {**}
5 {**} To modify the dates: Add a Custom To and/or Custom From da
```

Buttons: Cancel, < Back, Next >, Finish

7. On Step 2 of the Text Import Wizard screen, ensure that Tab is selected under Delimiters. Click **Next**:



This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

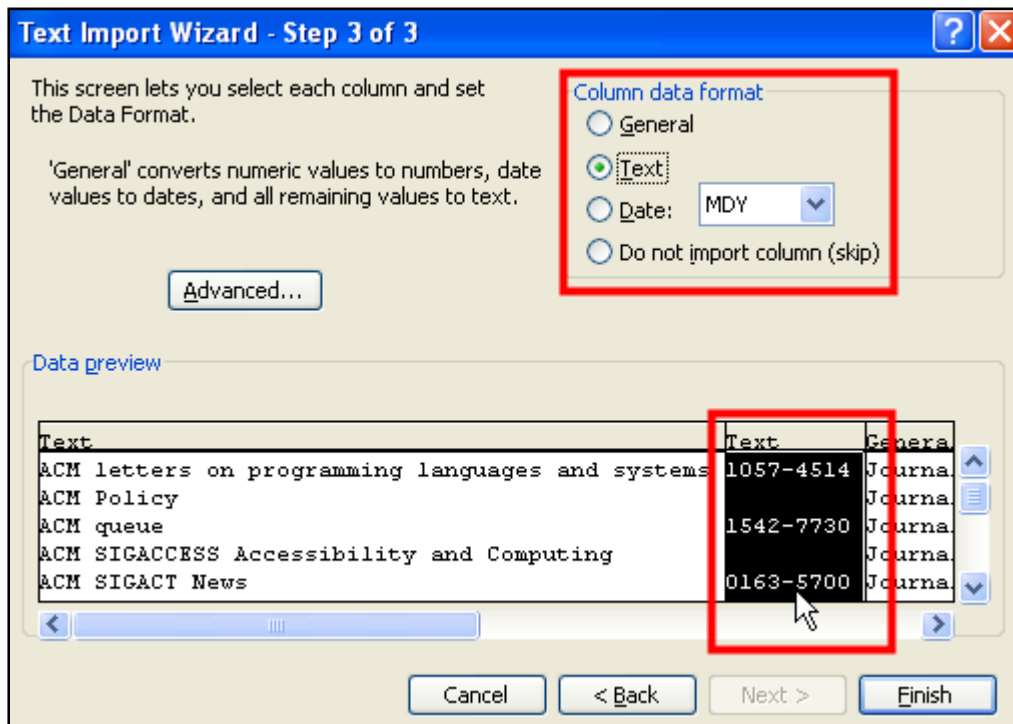
☒ Tab ☐ Semicolon ☐ Comma ☐ Treat consecutive delimiters as one
☐ Space ☐ Other: Text qualifier: "

Data preview

```
{**} If the database is non-selectable; values in the status colu
{**}
{**} To modify the Status: Edit the field next to the Title you w
{**}
{**} To modify the dates: Add a Custom To and/or Custom From date
```

Buttons: Cancel, < Back, Next >, Finish

8. On Step 3 of the Text Import Wizard screen, first use the scrolling window at the bottom to find the ISSN/ISBN column. Select that column, and then be sure to select Text in the "Column data format" section just above it. Click **Finish**:



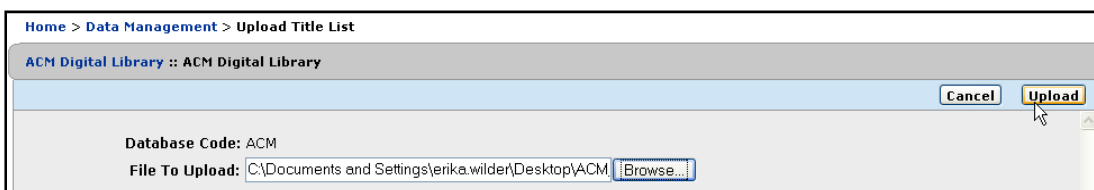
9. Now that the spreadsheet is populated with your data, make any necessary adjustments. Resizing and using AutoComplete are easy ways to edit and adjust cells within Excel.

Currently only three columns of data are editable: Status, Custom Date From, and Custom Date To. Attempting to edit other columns could result in error.

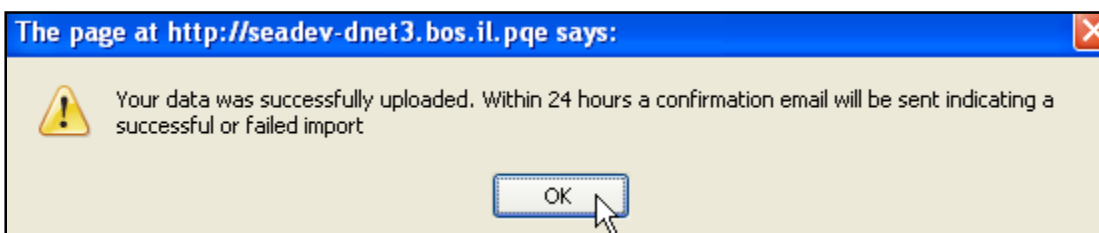
Also note that you must follow the date format of MM/DD/YYYY (e.g., 04/18/2009) for any Date cells. To make sure your cells conform to this format, right-click on any cell, choose Format Cells, and select Text.

When you've finished making any changes, save the file again.

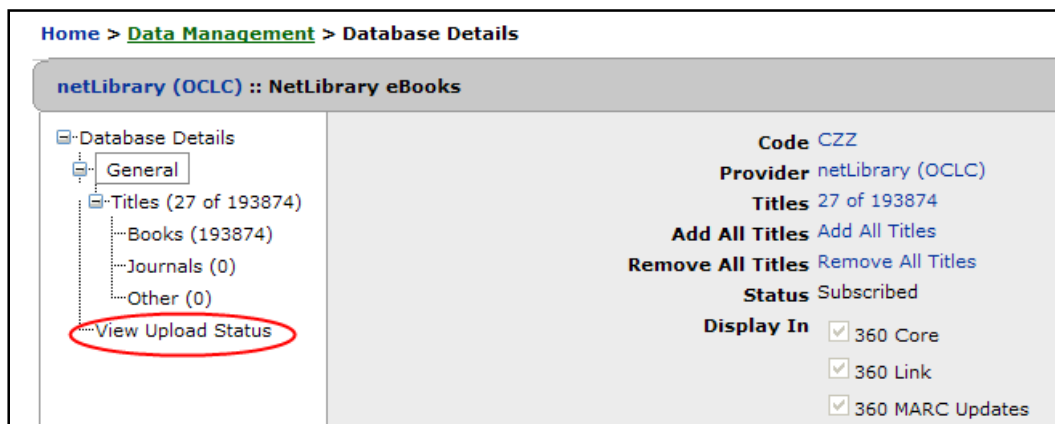
10. Return to the same Title List screen in the Client Center. Click the **Upload** button to upload your report. Use the Browse button to locate your report, and click **Upload** again.



11. A pop-up message will notify you that your report has been uploaded and that an email will follow.



12. Once you receive the follow-up email, check it to see the final status of your report. If it has failed, the message will prompt you to return to the Database Details screen for more information.
13. Back on the Database Details screen, click on View Upload Status (last link in the left-side menu) to check the status of the newly uploaded report:



4.8. Overlap Analysis

Overlap Analysis is a powerful tool accessible from the “Assessment Tools” section of the Client Center Home Page.

In your library collection, many titles are available in more than one database. This is called “overlap,” and some of this overlap is inevitable, due to the nature of aggregated databases. But it is most beneficial for your library to subscribe to databases with the most unique content, and this tool can help you identify them.

The Overlap Analysis feature shows you, for each database in your collection, the number of titles that are unique to that database, and the number that are available elsewhere in your collection.

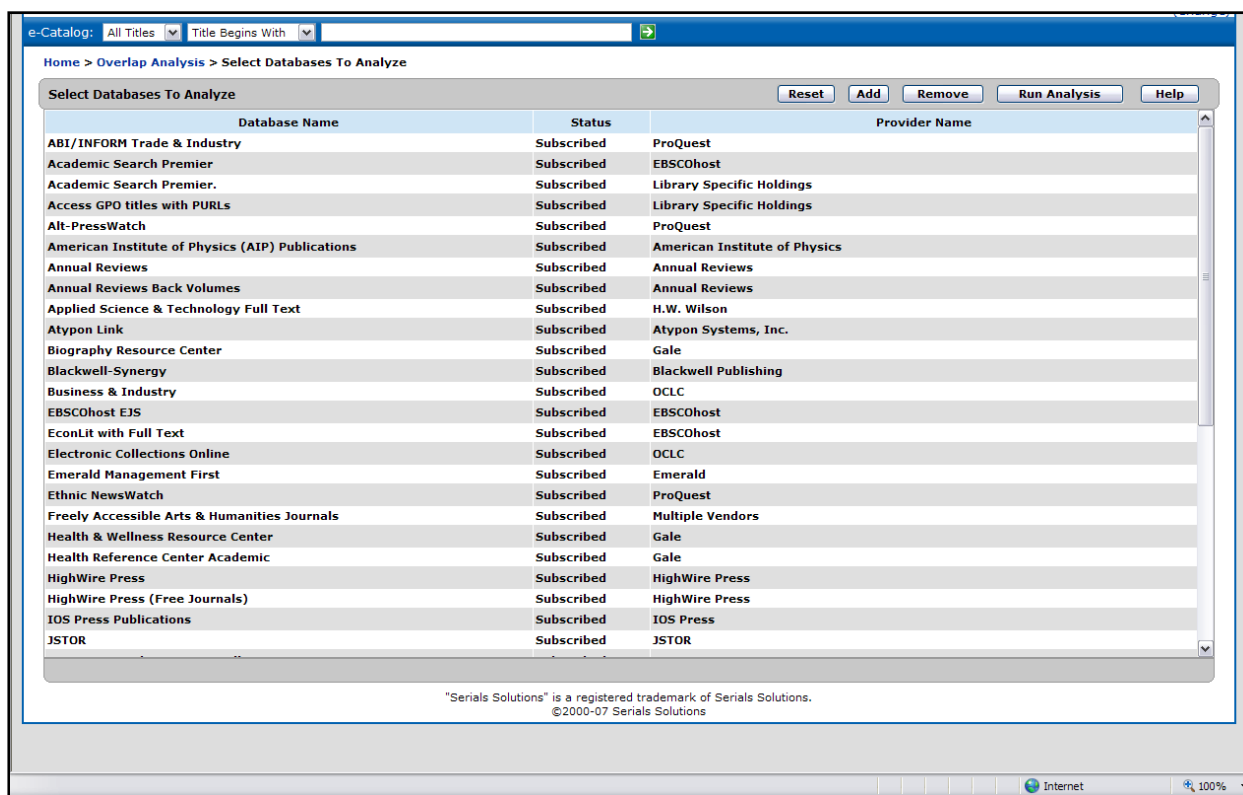
Because Overlap Analysis is available in the Client Center, you are able to generate an unlimited number of statistical reports to evaluate your current database subscriptions and those that you consider adding.

Use Overlap Analysis to:

- Identify databases that deliver the most value for your library.
- Evaluate possible changes to your collection.
- Get the most out of your electronic resources budget.
- Increase the depth and breadth of your e-journal collection.

Generating Your Overlap Report

To get started with Overlap Analysis, click on the Overlap Analysis link in the Assessment Tools section on the Client Center Home page. The Overlap Analysis window will open with all of your Subscribed Databases selected by default:



If you choose not to make any changes to your analysis, click the **Run Analysis** button.

Note: Overlap analysis can compare a maximum of 300 databases at a time. If more are attempted, you'll get an error message. You'll need to remove some databases from the analysis (see **Removing a Database from the Overlap Analysis List** below).

It will take a few moments for your overlap to complete. When the report appears, you will see a table of your database overlap details. If you would like to make changes, you can click on the **Edit Comparison List** button to add or remove resources, or reset the report and run the analysis again.

Database Name	Title Unique	Holding Unique	Total Unique	Full Holding Overlap	Partial Holding Overlap	Total Holding Overlap	Title Overlap	Total	Percent Full Overlap	Percent Unique
ABI/INFORM Trade & Industry	401	54	455	389	330	719	5	1179	33.0	38.6
Academic Search Premier	1137	40	1177	1836	1517	3353	6	4536	40.5	25.9
Academic Search Premier.	0	0	0	0	1	1	0	1	0.0	0.0
Access GPO titles with PURLs	23	0	23	0	5	5	0	28	0.0	82.1
Alt-PressWatch	128	33	161	36	28	64	1	226	15.9	71.2
American Institute of Physics (AIP) Publications	3	0	3	1	3	4	0	7	14.3	42.9
Annual Reviews	3	1	4	0	11	11	0	15	0.0	26.7
Annual Reviews Back Volumes	1	0	1	0	4	4	0	5	0.0	20.0
Applied Science & Technology Full										

If you want to print your overlap analysis, the best way is to export the summary and print the result from another application on your computer (see **Exporting Overlap Analysis Data**, below).

This table explains some of the key terms used in the analysis:

Holding Type	Description
Title Unique	Journals available in only one of your databases.
Holding Unique	Journals available in more than one database, but <i>without</i> overlapping coverage dates.
Total Unique	The sum of "Title Unique" and "Holding Unique" holdings.
Full Overlap	Journals available in more than one database. The coverage dates of the reference holdings are <i>completely</i> overlapped by at least one comparison holding.
Partial Overlap	Journals available in more than one database. The coverage dates of the reference holdings are only <i>partly</i> overlapped by at least one comparison holding.
Total Overlap	The sum of "Full Overlap" and "Partial Overlap" holdings.
Total Holdings	The sum of "Total Unique" and "Total Overlap" holdings.
Percent Full Overlap	Percentage of all holdings in a database that are completely overlapped by at least one other holding from another database.
Percent Unique	Percentage of all holdings in a database that are either title unique or holding unique.

On the left hand navigation tree, you can click Totals to see the totals of each column:

Home > Overlap Analysis > Results	
Totals	
Results	Title Unique 21836
Details	Holding Unique 498
Totals	Total Unique 22334
	Full Holding Overlap 10446
	Partial Holding Overlap 7677
	Total Holding Overlap 18123
	Title Overlap 2917
	Total 43374
	Percent Full Overlap 24.1
	Percent Unique 51.5

Adding a Database to the Overlap Analysis List

If you want to add a database(s) to the collection list, even one you do not currently subscribe to, you can click on the **Add** button. You can search by "Database Begins With" or "Provider" to locate the appropriate database(s) you would like to include. Once you find the name from the search results, check the box next to it to include it in the analysis, and click the **Add** button. Once the list updates, the **Run Analysis** button is available to retrieve the report:

SerialsSolutions 1-866-SERIALS (737-4257) Your Account | Support Center | Contact Us | Log Out 10359
Current Library: 360 Resource Manager Demonstration Library (ERM) (Change)

e-Catalog: All Titles Title Begins With

Home > Overlap Analysis > Add Databases

Add Databases Add Help

Search By: Database Begins With AB Search

<input type="checkbox"/>	Database Name	Status	Provider Name
<input type="checkbox"/>	Ab Imperio	Not Subscribed	Ab Imperio
<input type="checkbox"/>	ABI Complete (Turkish Consortium)	Not Subscribed	ProQuest
<input type="checkbox"/>	ABI/INFORM	Not Subscribed	OCLC
<input type="checkbox"/>	ABI/INFORM Archive Complete	Not Subscribed	ProQuest
<input type="checkbox"/>	ABI/INFORM Complete	Not Subscribed	ProQuest
<input type="checkbox"/>	ABI/INFORM Complete - Alumni Version	Not Subscribed	ProQuest
<input type="checkbox"/>	ABI/INFORM Dateline	Not Subscribed	ProQuest
<input type="checkbox"/>	ABI/INFORM Global	Not Subscribed	ProQuest
<input checked="" type="checkbox"/>	ABI/INFORM Research	Not Subscribed	ProQuest
<input type="checkbox"/>	ABI/INFORM Select	Not Subscribed	ProQuest
<input type="checkbox"/>	ABI/INFORM Trade & Industry	Subscribed	ProQuest

Removing a Database from the Overlap Analysis List

If you want to remove a database(s) from the collection list you click on the **Remove** button. The databases will appear with check boxes next to each one. Check the database(s) you would like to remove from the Analysis and click the **Remove** button. Once the list updates, the **Run Analysis** button is available to retrieve the report.

SerialsSolutions 1-866-SERIALS (737-4257) Your Account | Support Center | Contact Us | Log Out 10359
Current Library: Product Support test library (NAN) (Change)

e-Catalog: All Titles Title Begins With

Home > Overlap Analysis > Select Databases To Analyze

Select Databases To Analyze Remove Reset Cancel Help

<input type="checkbox"/>	Database Name	Status	Provider Name
<input type="checkbox"/>	AB Print Holdings	Subscribed	Library Specific Holdings
<input type="checkbox"/>	ABI/INFORM Trade & Industry	Subscribed	ProQuest
<input type="checkbox"/>	Academic OneFile	Subscribed	Gale
<input type="checkbox"/>	Academic Search Premier	Subscribed	EBSCOhost
<input type="checkbox"/>	AERA SIG Communication of Research	Subscribed	AERA SIG
<input type="checkbox"/>	Alt-HealthWatch	Subscribed	EBSCOhost
<input type="checkbox"/>	Alt-PressWatch	Subscribed	ProQuest
<input type="checkbox"/>	American Geophysical Union	Subscribed	American Geophysical Union
<input type="checkbox"/>	American Institute of Physics (AIP) Publications	Subscribed	American Institute of Physics
<input type="checkbox"/>	American Physical Society Journals (Scitation)	Subscribed	American Physical Society

Resetting the list of Databases

If you have added or removed Databases and want to return to the original Subscribed List, click on the **Reset** button on the main Overlap Analysis page and the list will be restored to default.

Exporting Overlap Analysis Data

By using the **Export Summary** button you can export the data results which are currently displaying on the Details screen. The data will be exported to a tab-delimited text (.TXT) file. You will be prompted to Save the file to a local location on your computer or a network drive. Open your spreadsheet or database application, choose the File > Open functionality of the application and navigate to the file you saved. If using Excel, you should follow the on-screen prompts of the Text Import Wizard as it steps you through the process to open the file,

indicating the file is delimited, and specifically tab delimited. Please note that different spreadsheet applications and versions have different steps for opening delimited files so please refer to their help systems for if you are unsure how to do it.

e-Catalog: All Titles Title Begins With (Change)

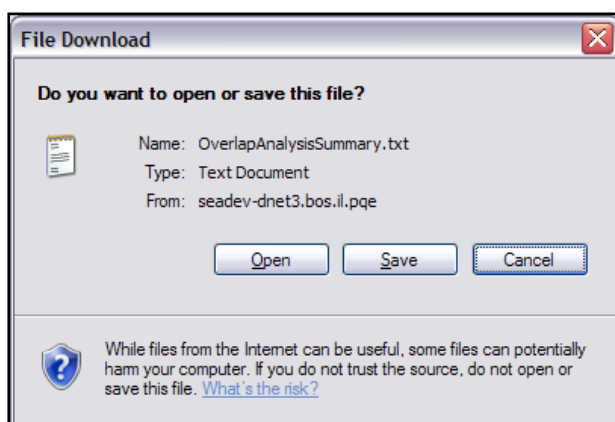
Home > Overlap Analysis > Results

Details

Results Details Totals

Database Name	Title Unique	Holding Unique	Total Unique	Full Holding Overlap	Partial Holding Overlap	Total Holding Overlap	Title Overlap	Total	Percent Full Overlap	Percent Unique
ABI/INFORM Trade & Industry	401	54	455	389	330	719	5	1179	33.0	38.6
Academic Search Premier	1137	40	1177	1836	1517	3353	6	4536	40.5	25.9
Academic Search Premier.	0	0	0	0	1	1	0	1	0.0	0.0
Access GPO titles with PURLs	23	0	23	0	5	5	0	28	0.0	82.1
Alt-PressWatch	128	33	161	36	28	64	1	226	15.9	71.2
American Institute of Physics (AIP) Publications	3	0	3	1	3	4	0	7	14.3	42.9
Annual Reviews	3	1	4	0	11	11	0	15	0.0	26.7
Annual Reviews Back Volumes	1	0	1	0	4	4	0	5	0.0	20.0
Applied Science & Technology Full										

Edit Comparison List Export Summary Help



If you have drilled into one of the titles, for example Title Unique, the display shows 1 of 34 screens. Clicking on the **Export Results** button will export the entire set of data to the .TXT file, not just what is showing on the first screen. Same instructions as above apply to opening the export file with your spreadsheet or database application.

SerialsSolutions 1-866-SERIALS (737-4257) Your Account | Support Center | Contact Us | Log Out 10359
Current Library: 360 Resource Manager Demonstration Library (ERM) (Change)

e-Catalog: All Titles Title Begins With

Home > Overlap Analysis > Results > Title Unique Holdings List

Title Unique Holdings List : Academic Research Library Export Results

Go to Page: 1 / 34

Title Name	ISSN	Coverage Dates	Database Name	Overlap Type
19th century music	0148-2076	10/01/2001 - present	Academic Research Library	TitleUnique
401k advisor	1080-2142	06/01/1998 - present	Academic Research Library	TitleUnique
A.U.M.L.A.	0001-2793	12/01/2000 - present	Academic Research Library	TitleUnique
AAP General News Wire		11/24/2004 - present	Academic Research Library	TitleUnique
AARP modern maturity	1538-5981	02/01/1991 - 11/01/1997	Academic Research Library	TitleUnique
Academy of Information and Management Sciences journal	1524-7252	01/01/2006 - present	Academic Research Library	TitleUnique
Academy of Management journal	0001-4273	03/01/1987 - 12/01/2001	Academic Research Library	TitleUnique
The Academy of Management review	0363-7425	01/01/1987 - 10/01/2001	Academic Research Library	TitleUnique
The Accounting review	0001-4826	01/01/1988 - present	Academic Research Library	TitleUnique
ACI materials journal	0889-325X	01/01/2005 - present	Academic Research Library	TitleUnique
ACI structural journal	0889-3241	01/01/2005 - present	Academic Research Library	TitleUnique

Understanding Your Overlap Report

When reading your overlap report, it is important to understand the concepts involved in the results:

- **Reference Holding:** A specific journal that appears in the database you are analyzing or viewing.
- **Comparison Holding:** Any other instance of that same journal title in your other databases.
- **Overlap Type:** The specific type of overlap that each journal holding in a database is assigned.

4.9. Usage Statistics

Overview

You can use Serials Solutions usage statistics to keep track of three different metrics:

- A count of searches within Serials Solutions products, broken out by search type.
- A count of subject browses within the Serials Solutions subject hierarchy.
- A count of all e-resource and database clicks when your patrons access those resources using Serials Solutions resource discovery tools – these are called “click-through stats.”

Statistics are available as far back as January 2006.

Usage statistics are provided by a customized reporting system from Serials Solutions’ partner, PivotLink. Through a secure, private system, PivotLink keeps your library’s usage data and makes it available to you. No other library has access to your data, nor do any other PivotLink clients.

Although this section will give you a good start to using usage statistics, the reporting capabilities of this system are very extensive, and are thoroughly explained in the online guide from PivotLink, accessible from within the Reports system. You can also download a PDF copy of the User Guide from the Support Center (search for “360 Core and 360 Counter: Reports User Guide”). One thing you may notice in the PivotLink User Guide is that the examples are from retail companies rather than libraries; this is because PivotLink’s primary customers are major retailers. But the capabilities of this system are just as well-suited to libraries’ reporting needs.

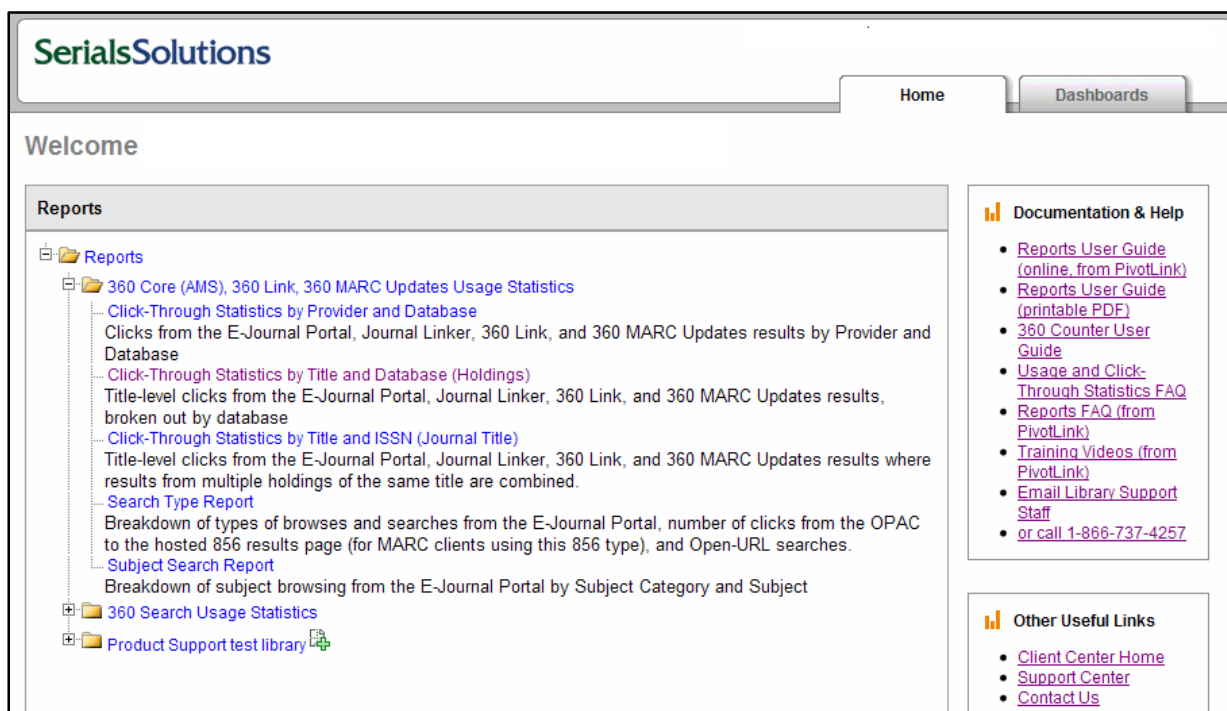
Note: The usage statistics system requires your computer to have Adobe Flash Player version 9 or newer. It’s free to install if you don’t already have it.


Choose Your Report

To get started, click on the **Usage Statistics** link in the **Assessment Tools** section on the **Client Center Home Page**:

Manage Your Data	
Data Management	
View Data Summary	Data Management
Advanced 360 Resource Manager Tools	
Collections	Cost Data Upload
Menus	Reports
Assessment Tools	
Usage Statistics	Vendor Statistics Metadata
Overlap Analysis	360 Counter

You'll see an outline of available reports:



Note: If a folder only has a plus symbol (), then just click on the folder to open it and see the reports inside.

The first folder, “360 Core (AMS) ... Usage Statistics” contains predefined report templates to get you started.

If your library subscribes to 360 Search, you'll also see the folder titled “360 Search Usage Statistics,” which contains predefined report templates for those statistics.

The third folder of reports, called “Product Support test library” in the screenshot above (but named for your library in your report list), is where you will find reports you create and save for your library (see “**Save as ...**” below).


Choose the report you want (we'll use **Click-Through Statistics by Title and Database (Holdings)** for this example), which leads you to a filter screen:

Reports > 360 Core (AMS), 360 Link, 360 MARC Updates Usage Statistics >


Click-Through Statistics by Title and Database (Holdings)





Data Last Updated 10/16/2009 07:05:55

Applied Filters: [LibraryCode: AZU]

Database: including  All

- AB/INFORM Archive Complete
- AB/INFORM Complete
- AB/INFORM Global
- Academic OneFile
- Academic Search Complete
- Academic Search Premier
- Access International News
- Access World News
- ACLS Humanities E-Book

Journal: including  (see instruction below)

☒ Month: Jul  2009  to: Oct  2009 

From here, you can pre-select what data you want to view in your report. The options presented here depend on your selected report. In a Holdings report like this, you can select one or more databases and journals. The more

holdings you include, the longer it will take to create the report and, naturally, the larger the report will be. For this example, we'll choose the first half-dozen databases.

Note: If you have a large number of titles or databases, you'll see just a blank entry (like the "Journal" line in the graphic above) rather than a list to pick from (like the "Database" line above). Enter all the names of journals for which you want to get statistics, separating each title with a comma. It's very important to match the spelling *and capitalization* of a title or database, or the system won't recognize it and will deliver no results.

After selecting the holdings you want to compare, use the month and year drop-down menus to change the default date range as desired.

When you click **View report**, and after a delay while the data is prepared, you'll see your report:

Reports > 360 Core (AMS), 360 Link, 360 MARC Updates Usage Statistics >
Click-Through Statistics by Title and Database (Holdings) [[Link to this Report](#)]
 Data Last Updated 07/17/2009 07:24:15

View | Subscribe | Export PDF | Export | Save as ... | Help

Applied Filters: [Month: Jan 2007 to Jul 2009 | Database: AB Print Holdings,ABI/INFORM Global,ABI/INFORM Trade & Industry,Academic OneFile,Academic Search Premier,Access World News | LibraryCode: NAN]

Journal	Database	ISSN	Hits			
			2007	2008	2009	Grand total:
AARP the magazine	AB Print Holdings	1541-9894	-	2	-	2
Academic and library computing	Academic OneFile	1055-4769	1	-	-	1
Academy of Health Care Management journal	Academic OneFile	1559-7628	-	1	-	1
Ageing international	Academic Search Premier	0163-5158	-	1	-	1
Times (London, England : 1788)	Academic OneFile	0140-0460	-	1	-	1
	ABI/INFORM Trade & Industry		4	1	-	5
	Academic OneFile		1	-	1	2
	Academic Search Premier		1	-	-	1
Grand total:			7	6	1	14

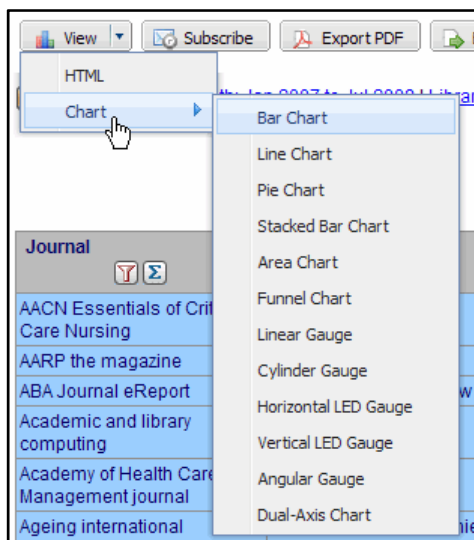
You may notice blank cells in your **Journal** column. This means that the statistics associated with the databases listed are not journal-specific. One example of this might be a user clicking on a database name from the E-Journal Portal search page. That would be a link at the database-level only.

View

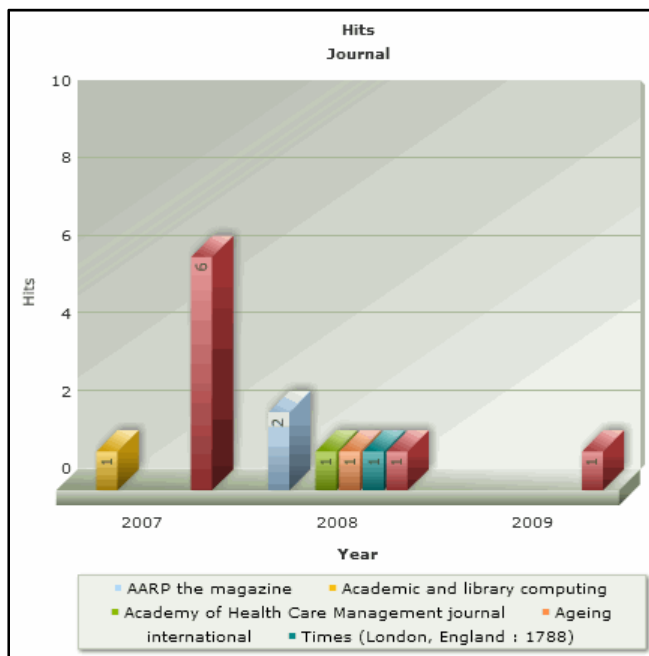
The View button gives you two options for how to look at your data: an HTML table and charts.

HTML: The HTML table is the colored one shown in the screenshots above. Note that if your report is so large that the system defaults to a text-only display, you can still choose to change it to the HTML view, but it will take several minutes for the system to create the report each time you update it.

Chart: There are a dozen options for charting your data:



As an example, let's look at our report in the **Bar Chart** view:



This example has only a few hits and a few journals, but if you have added a lot of databases or journals to your report, you may find that it's crowded or difficult to read in a chart. You can still change the filters in this mode. You may also change the chart style at any time. You may also try including fewer pieces of data: Fewer dates, larger time periods, or a smaller number of databases or journals can help simplify and clarify your charts.

You cannot resize a chart in the reports system; however, you can resize it if you bring the chart into a Dashboard (see page 56).

Subscribe

Once you have created a report just the way you like it and then saved the report (see "**Save As ...**" below), you can request that the system automatically create new reports on a regular basis and either email the reports to

you or send them to a particular computer. This is called “subscribing” to a report, and you start by clicking on the **Subscribe** button on your report page.

On the **Edit subscription** page, you can choose many different options, including a title, schedule, and how you want it sent to you:

[Reports](#) > 360 Core (AMS), 360 Link, 360 MARC Updates Usage Statistics >
Click-Through Statistics by Title and Database (Holdings) [[Link to this Report](#)]
Edit subscription
Note: Subscriptions will only send the data in table form. Chart objects will not be included.

Report
Folder title: 360 Core (AMS), 360 Link, 360 MARC Updates Usage Statistics
Report title: [Click-Through Statistics by Title and Database \(Holdings\)](#)
Subscription title: Click-Through Statistics by Title and Database (Holdings)

Schedule
Subscription schedule: ☒ Daily ☐ Weekly ☐ Monthly (day of month) ☐ Monthly (week day of month)
Subscription hour: 09 Time zone: Pacific Time

Delivery
Report type: HTML
Delivery method: ☒ Email ☐ FTP
Contact Information (kevin.lane-cummings@serialssolutions.com)
First Name Last Name
Phone FAX
Email to: Cc:
Message:

If you choose email delivery method, you include email information as well as whether the report comes as an attachment to the email or is embedded and displayed within the email itself. If you choose to use FTP, you need to give the system information on your FTP server (including username and password) so it can transfer the file to your server. One reason you might need to use FTP is because the system will only email a report to you if it is less than 20 MB.

Note: If you make modifications to a default report but don't **Save** the report with a new name, and then **Subscribe** to the report, the subscription will actually be for the default report and not your modified report. You must **Save** your modifications first.

Once you have saved your subscription, you will be given the opportunity to run it immediately; if you don't need to run the report, click the **Home** tab to go back to the main **Reports** page.

Also, saved subscriptions are stored in a new folder on your **Reports** page, called Subscriptions.

Export PDF

If you want to save an Adobe PDF of your report (which maintains the look of the table or chart), use the **Export PDF** button and modify the settings as you desire.

Export

Clicking the Export button gives you several ways of exporting your report so that another program (such as Microsoft Excel or a text editor) can open it.

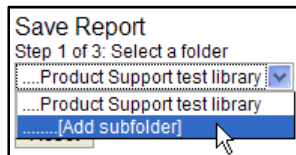
Save as ...

No matter what changes you make to the pre-defined reports, if you don't **Save** the report, all your changes will be lost. (However, your actual usage data will *not* be lost.) The **Save as ...** function allows you to save the particular filters and views that you've chosen, and then to give the report a name so you can go back to it later.

Note: When you save a report, you are not saving the actual usage data that are displayed. So if that data changes as the usage changes, the new data will be in your saved report the next time you open it.

Other libraries will not have access to your Saved reports, but any other accounts (users) at your library will be able to view and change any saved reports in your library's folder.

You can create subfolders within your library's report folder as needed to sort and store your reports (for instance, if you want each user at your library to have their own subfolders, or for different types of reports or charts):

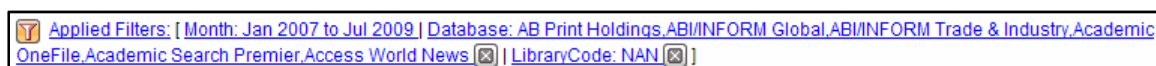


You can give the report a new name or, if you want to save over a previously saved report, those report titles will be listed as well.

There is a checkbox option at the bottom of the Save Report page where you can tell the report to “automatically update time filters.” Check this box if, for instance, you had the report display data up to the present, and you want that “present” date to shift to whatever future date you use the report again.


Applied Filters

The Applied Filters row shows which data filters have been chosen for this report:















In this case, the filters are the date range, the databases selected, and the library code. (Unless you have access to more than one library, you won't be able to change the library code, but it appears here anyway.)


If you click on **Applied Filters**, you'll be taken to the same page you saw when you first selected the report type, where you chose the date range and databases. Other types of reports show other filtering options.


If you click one of the x buttons , that filter will be removed. For instance, if you click the x after the list of databases selected, *all* databases will be displayed in this report (in other words, it isn't filtering out any databases).

Report Quick Actions

The buttons at the top of the columns give you easy access to change how the report is presented:


	Year 	
	  	2007
Database   	ISSN  	  
AB Print Holdings	1541-9894	-
Academic OneFile	1055-4769	1

- The left arrow  moves that column one position to the left, and usually causes the rows to re-sort based on the new column positions. For example, to see statistics for the journals in a particular database, click the left arrow at the top of the **Database** column. This sorts the table by database name.





- The funnel  is the filter button. While the Applied Filters list affects your entire report, this tool allows you to use filters within each specific column. Click on this button in the ISSN field to filter by ISSN, in the Journal field to filter by Journal, etc. When used in a numeric field, the filter button runs a metric filter, allowing you to see a specific set or percentage of your results:

Reports > 360 Core (AMS), 360 Link, 360 MARC Updates Usage Statistics >
Click-Through Statistics by Title and Database (Holdings) [[Link to this Report](#)]

Filter rows by Hits

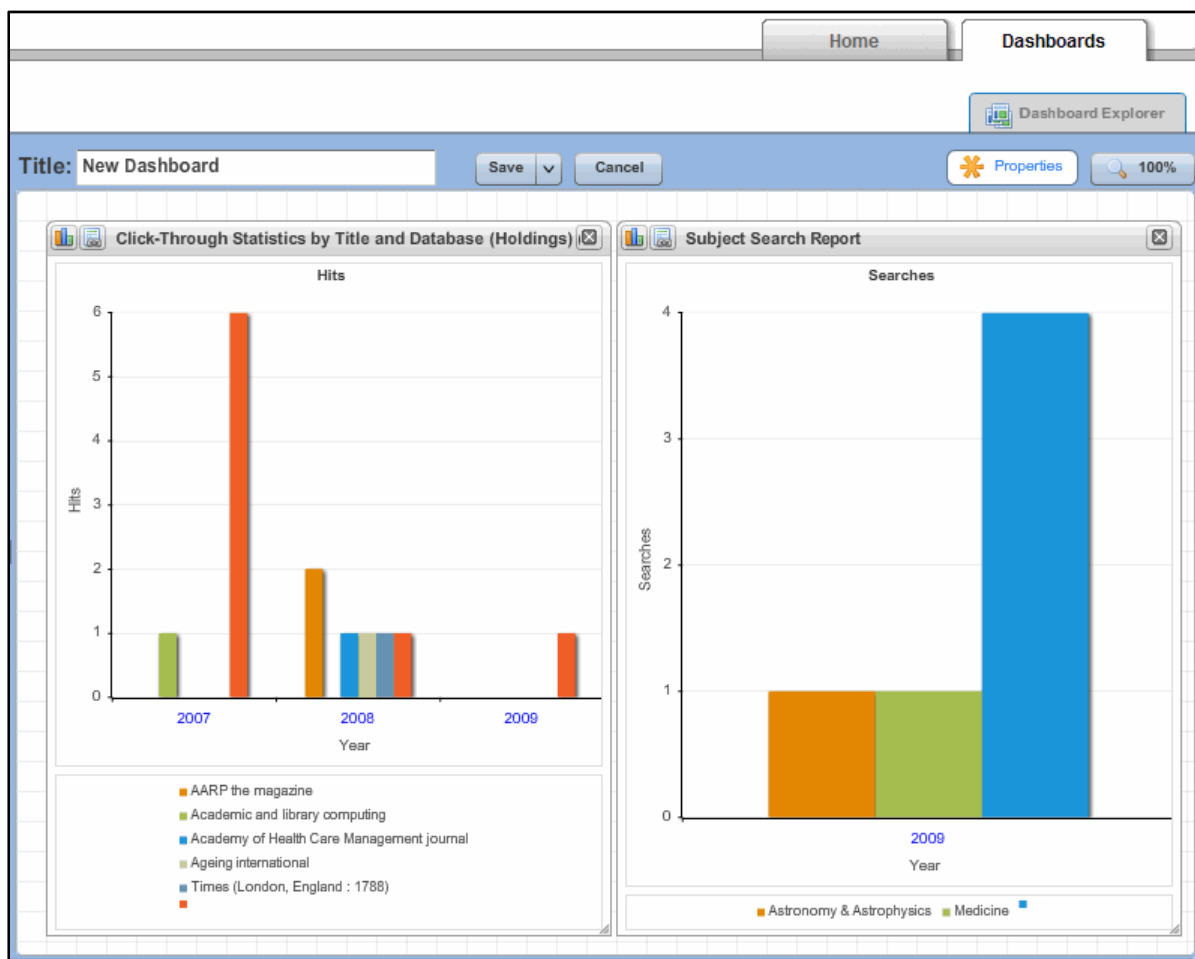
Hits  Separate multiple values with ","

Enter one value for IS GREATER THAN, IS GREATER THAN OR EQUAL TO, IS LESS THAN, and IS LESS THAN OR EQUAL TO.
Enter two values for IS BETWEEN and IS NOT BETWEEN, separated by ",".
Enter one or more values for IS ONE OF and IS NOT ONE OF, separated by ",".
Enter one or two values for IS AMONG TOP/BOTTOM and IS AMONG TOP/BOTTOM (%), separated by ",".

- The sigma button  provides a subtotal based on the field in which it's placed.
- The sort buttons   sort your results in ascending or descending order.
- The close button  removes a column or a row. (In the example above, it would remove all the year columns and provide just a single column with data from all the years in the filter.)
- The **Year** drop-down menu (above the ISSN column in our example above) allows you to change periods of time (years, weeks, days).

Dashboards

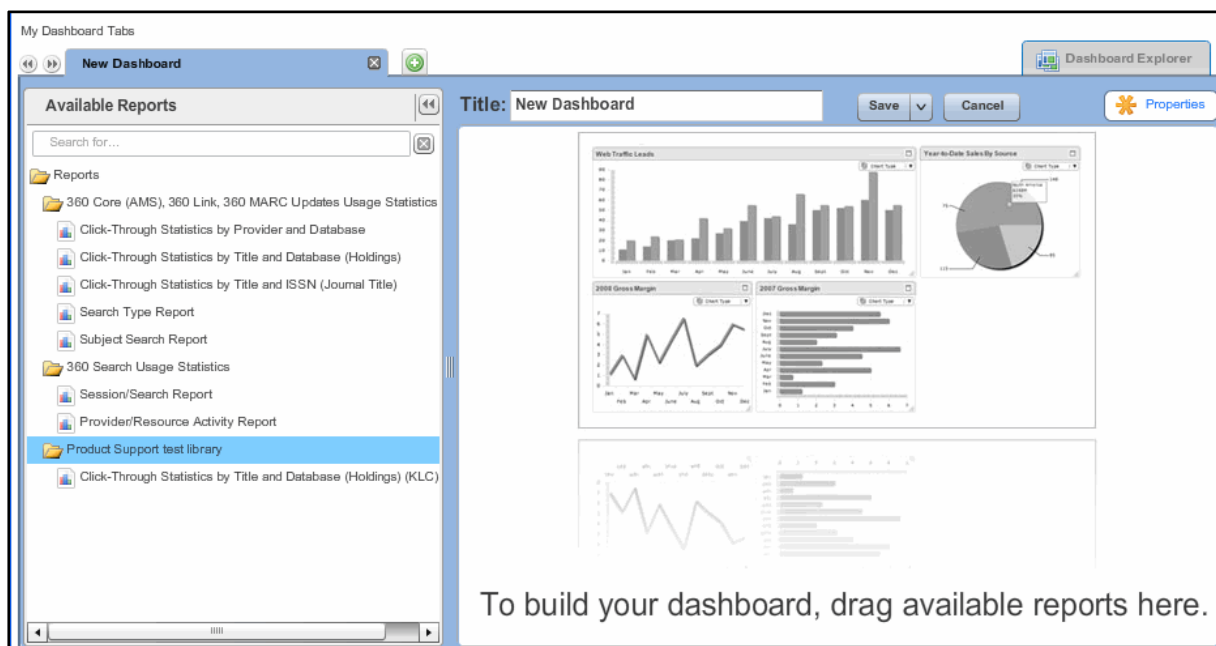
One of the most powerful tools in the usage statistics reporting system is the Dashboard, which is a customized collection of charts and tables that you can manipulate as needed to display information in one place:



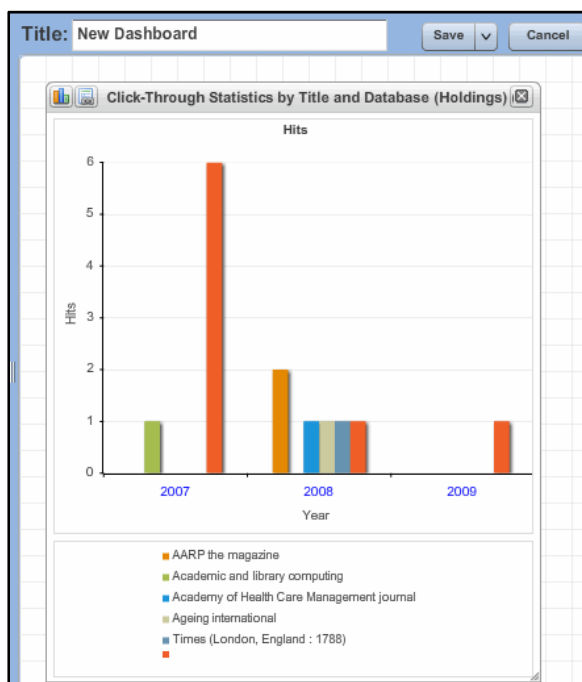
You access the Dashboards by clicking on the Dashboards tab in the upper right. If you haven't yet created any Dashboards, click **Create Dashboard**.

You can eventually create multiple Dashboards to show different information, so you'll want to give each one a descriptive **Title**.



Next, click the folder on the left that contains your saved reports:




Now drag each report you want onto the Dashboard. It can take time to generate the view, but eventually the report/chart will appear on your Dashboard:



You can add many reports to the Dashboard, although you'll need to move them around and scale them (dragging the lower-right corner) to get them to fit.

Even after you place a report on the Dashboard, you can change how it looks: In the upper left corner, click the display-type button  to change the type of graph; and click the detailed-report button  to see your original

tabulated report and, if desired, change the filters. If you change filters and save the report again with the same name, the report *will* change on the Dashboard; the Dashboard just looks to the saved report to get its information.

Once you've saved a Dashboard, it becomes the first tab on a list of Dashboards. To create a second Dashboard, click the green New Dashboard button .

5. MANAGE YOUR PRODUCTS

The “Manage Your Products” section of the Client Center Home Page looks different to different clients, depending on which Serials Solutions products they subscribe to, but every account has access to the 360 Core features here:

Manage Your Products	
360 Core	
View E-Journal Portal	OCLC eSerials Holdings Service
Administration Console	Data On Demand

This chapter outlines what tools are accessible from this section for each product. **Note:** For 360 Resource Manager clients, the Resource Manager-specific tools are listed under the “Manage Your Data” section of the page. For 360 MARC Updates clients, there are no Client Center-integrated tools, but clients subscribed to it can see that it is checked off in the “Products” section. More information about viewing MARC records is found in section 5.2 on page 60.

Anyone with a Client Center account is able to view the 360 Core tools available in the “Manage Your Products” section. There are four features offered here.

- **View E-Journal Portal:** The E-Journal Portal allows libraries to easily manage their entire e-journal collection from a single and customizable interface. Use this link from the Client Center Home Page to peek into the portal. For more information on the portal, see the E-Journal Portal User Guide in the Client Center's Support Center.
- **Administration Console:** Make changes to your library's E-Journal Portal pages using this customization and configuration tool. The Administration Console walks you through the aspects of the Portal that you can edit, page by page. See the next section (5.1) for more details on this feature, or search for the documents about the E-Journal Portal Administration Console in the Support Center.
- **OCLC eSerials Holdings Service:** Have Serials Solutions report your electronic holdings to OCLC by registering through the Client Center and through OCLC. This free service makes it easy for libraries to share their holdings information with others. For more details, see the OCLC eSerials Holdings Service information in the Support Center.
- **Data on Demand:** Data on Demand is a tool to generate a report of your library's holdings – including journals and books – at any time. You can then open the report in Microsoft Excel or a similar application and use it for things like collection development, identifying which titles are in particular databases or classified with particular subjects, etc. For more information, see the Data on Demand information in the Support Center.

5.1. E-Journal Portal Administration Console

The E-Journal Portal Administration Console is a tool that allows you to change and edit the E-Journal Portal to fit your needs. Many patrons are more comfortable searching in a familiar interface, and with the Administration Console, you can design the Portal to match your library's website, or use another scheme of your choice.

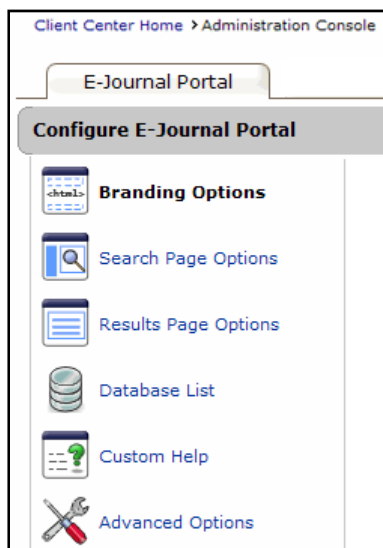
Some reasons you may consider customizing your library's E-Journal Portal:

- Are your users familiar with the term “e-journals”? Does your E-Journal Portal contain more than just e-journals, like print journals, books, eBooks, or microform holdings? You can change the phrasing to better fit your library.
- Would you like to see an introductory paragraph to the Search page, or provide library-specific information on the Help page? Add custom text that is tailored to your library.
- Does your library's website include navigational links? You could use them to help users navigate from the E-Journal Portal to relevant resources like the library catalog.

Note that, currently, some HTML knowledge is required for some sections of the Administration Console. For help with advanced customizations, please **Ask a Question** in the Support Center.

Making Your Customizations

The E-Journal Portal Administration Console is divided into sections that correspond to the pages in the actual portal – the search page, the results page, and the help page – as well as sections for general look and feel ("branding"), database list, and advanced options.



For detailed information on the E-Journal Portal Administration Console, please see specific documents in the Support Center; a good place to start is Answer 822.

5.2.360 MARC Updates

Viewing MARC Record Information In The Client Center

1. Using the e-Catalog search bar in the Client Center, search for a journal title.
2. When the journal search is complete, click on the resource title on the left-hand side of the screen.
3. After clicking on the title you are taken to a list of holdings for that title. On that page click on the Metadata branch in the left-hand navigation tree.
4. Under the Metadata section: If there is an SSJ number (Serials Solutions Journal number) listed after "Serials Solutions ID:," that means that we have a full record for the title. If we have full record for the title, then there will be links to the **uncustomized** MARC records. There can be multiple record types listed there and each record type would be associated with the SSJ listed on that page. To read more about the various record types, please see the 360 MARC User Guide.

Catalog: Journal Title Begins With British journal of an

Home > e-Catalog Journal Search Results > Authority Journal Details

British journal of anaesthesia CEPD reviews

Authority Journal Details

- Holdings List
- Metadata
- Public Note
- Weight

Title British journal of anaesthesia CEPD reviews

Serials Solutions ID ssj0020780

ISSN 1472-2615

Publisher Oxford University Press

Subjects Surgery & Anesthesiology: Anesthesiology

MARC Records

- Gale Neutral
- CONSER Neutral
- NLM Neutral
- CONSER Online

eISSN 1477-4518

4) Click on record types to see each uncustomized MARC record for this title.

5. If a record does not have a Serials Solutions ID listed, then it is a title for which we can only provide a supplemental brief record. If you believe that a full record should exist for such a title, please send us an email or submit a request via the Support Center web form asking us to investigate that title. Please also see the 360 MARC Updates User Guide for more information on Supplemental Brief Records.

Display Customization

From Data Management Home in the Client Center, some clients choose to include print holdings or other special databases in their A-Z lists, while excluding them from the MARC records. To make this customization, click on a database name on the Data Management Home Page, and then click on the Edit link. Uncheck the MARC box for any database that you do not want to include in your MARC records.

Home > Data Management > Database Details

ProQuest :: ABI/INFORM Global

Save Cancel

Database Details

- General
- Titles (1895 of 1895)
- 360 Resource Manager
 - Administration
 - Contacts
 - Cost
 - General
 - Licensing
 - Notes

Code PAG

Collection

Provider ProQuest

Titles 1895 of 1895

Status Subscribed

Serials Solutions AMS and 360 Link

360 Search

360 MARC Updates

Display In

Default URL http://proquest.umi.com/login

Custom URL http://0-proquest.umi.com.opac.library.csupomona.ed

4) Click on record types to see each uncustomized MARC record for this title.

6. MANAGE YOUR LIBRARY

Manage your Client Center accounts using the tools provided in the **Manage Your Library** section of the Client Center home page.

6.1. Library Settings

Use the **Library Settings** link to enter library URLs, IPs, date formats, and more. On the Library Settings page, each of these areas is accessible from the left-hand navigation tree. To make changes, click on the appropriate section and click **Edit** on the right side:

To confirm any edits, remember to click **Save** when you're finished.

6.2. Accounts (Users)

The **Accounts** section of the Client Center home page allows you to add, view, and delete accounts (Client Center users), and edit permissions and other preferences.

Adding an Account

1. On the Client Center home page, under **Manage Your Library**, click **Accounts**.
2. From the Account List, click **Edit** on the right side.

3. Enter the account information in the fields provided:

Home > Accounts > Account Details

Add New Account

Save Cancel

Salutation

First Name

Last Name

Email

Title

Phone

Fax

Address

City

State/Province/Country

Postal Code

Contact Type ☒ Additional
☐ Secondary
☐ Primary

4. Click on **Save** to save your changes.

For definitions of contact types, see the Account Management Glossary at the end of this chapter.

Viewing an Account

On the account list page, click the name of the account you want to view.

Editing an Account

1. Navigate to the Accounts List page.
2. Click on the name of the account you want to edit.
3. Click on “Edit” on the right side of the header on the Account Details page.
4. Enter your edits in the fields provided.
5. Click the “Save” button to save your changes.

Deleting an Account

1. Navigate to the Accounts List page.
2. Click on the red X next to the name of the account you wish to delete.

Editing Email Notices Preferences

1. Navigate to the Accounts List page.
2. Click on the name of the account you want to edit.
3. Click on “Email Notices” in the left-hand navigation tree.
4. Click on “Edit” on the right side of the header.
5. Enter your edits in the fields provided.

6. Click the “Save” button to save your changes.

For definitions of your email options, see “Email Notices” in the Account Management Glossary at the end of this chapter.

Editing Account Permissions

1. Navigate to the Accounts List page.
2. Click on the name of the account you want to edit.
3. Under “Permissions” in the left-hand navigation tree, click on either 360 Core or ERMS.
4. Click on “Edit” on the right side of the header.
5. Make your changes using the drop-down menus provided.
6. Click the “Save” button to save your changes.

Account permissions affect what each account can view in the Client Center and what actions they can perform. For definitions of specific types and levels of account permissions, see “Account Permissions” and “Account Permissions Types” in the Glossary below.

Account Management Glossary

Client Accounts Terms:

- Account: An online identity of a Client Center user.
- Primary Account or Primary Contact: Account that is contacted by Serials Solutions when general issues arise. It is mandatory that each Library have a Primary Account.
- Secondary Account or Secondary Contact: Should the Primary Account not be available for general issues, the Secondary Account is contacted.
- Client or Library: The organization that subscribes to Serials Solutions.

Email Notices Terms:

- Email Notices: Emails that are sent to accounts by Serials Solutions. These are specialized by product and fall into the categories listed below.
- Information: Important informational emails and updates regarding a particular product.
- Delivery: Emails containing a report or indicating that a new update to your products’ data is now available. This is mandatory for all subscribed products.
- 360 Core/Reports: Contact regarding Serials Solutions 360 Core tools, including E-Journal Portal and any reports you may receive.
- 360 MARC Updates: Contact regarding Serials Solutions MARC records. You do not have to subscribe to this service to receive information.
- 360 Link: Contact regarding Serials Solutions 360 Link. You do not have to subscribe to this service to receive information.
- News: Contact regarding important general news from Serials Solutions. It is recommended that at least one account for your Library receive news.
- Billing: Contact regarding your Library’s subscription or billing information.

Account Permissions Terms: Account Permissions are set by the Library at the account level to control what each account can access in your library’s Client Center profile. Permissions can be set to one of three levels:

- None: Account is not able to view or edit information regarding the permission area.
- View: Account is only able to view, not edit, information regarding the permission area.

- View/Edit: Account is able to both view and edit information regarding the permission area.

Account Permissions Types: These are areas affected by the Account Permissions. These sections may be read-only or not viewable to an account that does not have permission:

- Statistics Tools: Areas that display your Library's statistics, such as Use statistics and Overlap Analysis.
- Library Accounts: Areas that display details about accounts that are attached to your Client Center profile, such as the Account Management page, view account page, edit account page, and add account page.
- Library Information: Areas that display Library administrative information within the Client Center, such as Library Name, Institution Name, Library Website Address, Proxy URL, OPAC, changes, and services.
- Database Information: Areas that display Databases and journals to which the Library subscribes, such as the database list on the Edit Library page.
- E-Journal Portal Customization: Allows access to the E-Journal Portal Administration Console.
- Sharing / Inheritance Permissions: Controls the ability of an account to view or change the sharing or inheritance of Consortium resources.

Frequently Asked Questions about Account Management

1. **Can I make an account that has access only to Overlap Analysis and Usage Statistics?**

Yes. Add "view" permissions for Statistics Tools and set all other permissions to "none."

2. **My library's Client Center profile looks different when I am logged in compared to my co-worker. Why is this?**

You have different levels of permissions. These permissions can alter the way that the Client center looks to a certain account.

3. **Why can't I edit my Library Accounts "view/edit" permission?**

We have turned off your ability to limit your own Library Accounts permission in order to prevent accounts from locking themselves out. Another account that has "view/edit" permission can alter this for you, or you can contact Serials Solutions Library Support to assist you.

4. **We set up a new account (user). How do they get a password?**

When a new account is set up, an email message is sent to the new user containing a system-generated, temporary password. When they log in for the first time, they will be required to change the temporary password to one they create.

If the user doesn't receive this email, have them check their email Spam folder, then have someone in your library contact Library Support using the **Ask a Question** tab near the top of this page.

If you or another account holder forgets or loses a password, click "**Forgot your password?**" on the Client Center login page, enter the user name (email address), and click "**Reset my Password.**" A new, temporary password will be created and sent to that email address.

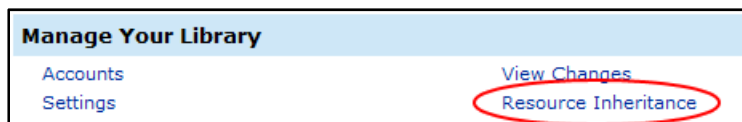
5. **I accidentally deleted an account. How do I put it back?**

Go to the "Add Account" page and add the exact same first name, last name, and email account. This will add the account again with the same password. However, you will have to add the contact information, permissions, and email preferences again.

6.3. Consortium Member Library Functions

Inheriting Information from the Consortium

If your library is listed as a Member library for one or more consortia, there is a selection on the Client Center homepage in the **Manage Your Library** section called **Resource Inheritance**:



Note: If you cannot see the Resource Inheritance link, or if you can get into the Resource Inheritance pages but you cannot change any inheritances, then your account does not have the necessary **View** or **View/Edit** Inheritance Permissions set on the Account Details page. See **6.2 Accounts (Users)** on page 62 for details on this.

All shared information may be viewed in this area; Member libraries must choose to add shared information to their profile (unless the Consortium has chosen to set up **Auto-Accept** for the Member library; see **Automatically Accepting Resources**, below).

Clicking the **Resource Inheritance** link will open a window listing the consortia of which your library is a member:

Home > Resource Inheritance		
Resource Inheritance		
Consortium Name	Auto Accept	Date Added
Test Hybrid Consortia Library 1	On	03/31/2009

The example above only shows one, but if your library is a member of multiple consortia sharing information via 360 Resource Manager Consortium Edition, each consortium would be listed. By clicking on a consortium name, you will be able to view information shared by that consortium and add/remove it from your profile.

Click on the consortium from which you would like to inherit information. A window opens with the inheritable objects in the left-hand navigation:

e-Catalog: All Titles Title Begins With

Home > Resource Inheritance > Inheritable Objects > Databases

Databases

Inheritable Objects

Databases

Database	Origin	Code	Status	Titles	Provider	Date Shared
Access Medicine	Sean's Test Account	ACG	From Consortium	66	McGraw Hill Companies	12/05/2008

To inherit databases, click **Edit** and check the boxes next to the databases you would like to inherit.

When you are done, click **Save**.

To stop inheriting databases, follow the same steps but uncheck the boxes next to the databases that were selected to be inherited.

Automatically Accepting Resources

Some consortia set up member libraries to automatically accept all shared resources from the Consortium. (This "Auto-Accept" setting is controlled by the Consortium itself and cannot be changed by the Member library.)

If this is true for your library, then all previously shared resources will be accepted by your library, as will all resources shared after the Auto-Accept is turned on. However, you can manually remove an inherited resource if you have **View/Edit** Inheritance Permissions on your account and your library hasn't been "locked" by the Consortium; see **Working with Inherited Databases** below for details.

Activating Email Notifications

You can be alerted via email if the consortium(s) of which you are a Member library shares resources with your library. To activate email notifications, go to the Client Center home page and click **Accounts** in the **Manage Your Library** section. Click the account name for the intended recipient. Click **Email Notices** in the left-side navigation tree, then click **Edit**:

Home > Accounts > Account Details

Yolanda Chao

Save Cancel

Account Details

General

Permissions

Serials Solutions 360 Core

360 Permissions

Email Notices

360 Core/Reports Delivery/Info

360 MARC Updates Delivery/Info

360 Link Delivery/Info

360 Resource Manager Delivery/Info

360 Search Delivery/Info

News ☒

Billing ☒

Consortial Updates ☐

Check the box next to Consortial Updates and click **Save**.

Email notifications are sent once every 24 hours and are generated only when a new object has been shared with your Member library. If more than one object is shared in a single 24-hour timeframe, only one consolidated message is generated per consortium.

Working with Inherited Databases

If you have chosen to inherit a database from the consortium, it can be viewed by going to Data Management home. Locate the database by browsing the list or doing a search. The Origin column indicates the name of the consortium from which the database is inherited. All inherited databases have a status of **From Consortium** (see the database **ACM Digital Library** in the screenshot below). This status cannot be changed by the Member library:

Home > Data Management

Library Databases

Create New Database Edit Status Show All

Database Name	Origin	Status	Titles	Provider	Collection
ABI Complete (Turkish Consortium)		Subscribed	3675	ProQuest	
ABI/INFORM Select		Subscribed	411	ProQuest	
ABI/Inform test regression 2.08 bugs		Subscribed	9	Library Specific Holdings	
ABI/INFORM Trade & Industry		Subscribed	1820	ProQuest	
ACM Digital Library	Test Hybrid Consortia Library 1	From Consortium	472 of 476	ACM Digital Library	

Click on the database name and then the **Edit** button.

Once the Database Details page opens, you will have the ability to edit many of the metadata fields on an inherited database (assuming the Consortium has given your library permission to do that, e.g., you are “unlocked”):

Home > Data Management > Database Details

ProQuest :: ABI/INFORM

Database Details

- General
- Titles (0)
 - Books (0)
 - Journals (0)
 - Other (0)
- 360 Resource Manager
 - Administration
 - Contacts
 - Cost
 - General
 - Licensing
 - Notes

Code ABL

Collection

Provider ProQuest

Titles 0

Status Subscribed

Display In:

- ☒ 360 Core
- ☒ 360 Link
- ☐ 360 Search
- ☒ 360 MARC Updates
- ☒ MARC-Group

eBook collections are now available in KnowledgeWorks. Please contact us at 360@serialsolutions.com to learn more about pricing details and how eBooks are integrated into your current service.

Default URL <http://proquest.umi.com/login>

Custom URL

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

- “Display In” checkboxes (see **Providing Inherited Resources to Library Patrons**, below)
- Custom URL
- Library Proxy
- Custom Database Name
- Database Description
- Long Database Description
- Public Database Note
- Public Database Note Display
- Public All Titles Note
- Public All Titles Note Display
- Provider-specific ID fields (OCLC, Gale, CSA, Factiva)

The rest of the fields are inherited from the consortium and cannot be altered by the Member library. Click **Save** when finished or **Cancel** if no changes are to be made.

At any point in the future you can choose to reset the metadata to its original (i.e., Consortium-set) conditions using the **Reset** button, which will only appear on this page if metadata has been changed.

Providing Inherited Resources to Library Patrons

Once you have inherited resources from a Consortium, those resources may become available in the E-Journal Portal, 360 Link, and 360 MARC Updates, if you subscribe to those services. (Inherited resources are not currently available in 360 Search; that functionality will be available in late 2009 or early 2010.) If the **Display In** box is checked in the Database Details page (see above), the resource will be available in that service.

However, the initial settings for a database to **Display In** may not be what you expect, as shown by the following:

If your Member library is *locked* by the Consortium, then when you inherit a database ...

- The **Display In** values of the database will be inherited from the Consortium for those Serials Solutions services shared by the Member library and the Consortium, and these **Display In** values *cannot* be changed;

- Other Serials Solutions services to which the Member library subscribes, but to which the Consortium does not subscribe, will be selected in the **Display In**, and again these values *cannot* be changed; and
- The Display In values for *inherited* titles within a database are the same as those of the database itself and *cannot* be changed at the title level.

If your Member library is *unlocked* by the Consortium, then when you inherit a database ...

- The **Display In** values of the database will automatically be turned *on* for 360 Core and 360 Link, although these **Display In** values *can* be changed by the Member library;
- The **Display In** values of the database will automatically be turned *on* for 360 MARC Updates and 360 MARC – Group, except for library-specific holdings, which will have those turned *off*; regardless, all these **Display In** values *can* be changed by the Member library; and
- The **Display In** values for *inherited* titles within a database are set the same as those of the database itself but *cannot* be changed at the title level.

Duplicate Resources

It is technically possible to inherit a resource from a consortium that you already subscribe to. If this occurs, and if both resources are set to **Display In** one or more services, then patrons will see both resources in those services, although one will actually have data copied over from the other. The fields this affects include Custom Database Name, Library Proxy, Title Coverage, Public Database Note, Public All Titles Note, and Terms of Use.

If this occurs, you need to force one resource to not **Display In** any services.

7. CONTACT US!

If you have any questions that were not answered in this guide, please visit the Client Center's Support Center (<http://support.serialssolutions.com/>) to find more documentation or to **Ask a Question** of our Library Client Services team. You can also use the **Ask a Question** system to make a comment or request a feature for future enhancements to the Client Center.

We're also available by phone: 1-866-SERIALS (737-4257), ext. 4.