

Basics of Summon and 360 Services

This training series is for institutions that use Summon as their discovery service and 360 Core / Client Center as their resource-management service.

These sessions cover the **basics** of those services, for library staff members new to the services.

Each session lasts one hour.



Session Name	Description	Recording
<p>Introduction and E-Resources Activation</p>	<p>This session will review your discovery services, like Summon and 360 Link, explain how to access the Client Center and add accounts, increase your understanding of the 360 Knowledgebase and the Central Discovery Index, and demonstrate the workflows for managing and activating your electronic resources. 60 minutes.</p> <p>Download Presentation Materials</p> <p>More Resources:</p> <ul style="list-style-type: none"> • Databases that Require Customer Configurations • Offline Date and Status Editor for Updating Multiple Holdings at One Time • Valid Date Formats 	<p>29 January 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
<p>Customize Discovery, Business Intelligence Tools, and What's New</p>	<p>This session will include demonstrations of how to customize your discovery services (Summon, 360 Link, and E-Journal Portal), how to use the business-intelligence tools (usage statistics, overlap analysis, etc.), and review new features added to Summon and 360 Services from August 2023 to February 2025. 60 minutes.</p> <p>Download Presentation Materials</p> <p>More Resources:</p> <ul style="list-style-type: none"> • Configuring the Summon Service • E-Journal Portal Administration Console • 360 Link Administration Console 	<p>05 February 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>

	<ul style="list-style-type: none">• Business Intelligence Tools• Summon Release Notes• Summon - Creating a Search Box, Search Widget, or Carousel	
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