360 Search Implementation and Customization at Cobleskill

by Peter Barvoets (Cobleskill)

The Van Wagenen Library recently went live with Serials Solutions 360 Search. Implementation was very easy thanks to detailed instructions provided by Serials Solutions as well as quick and responsive support. Customization of the search pages is a bit limited but we were able to achieve a workable and clean interface aligned to match our current arrangement of databases on our library's electronic databases page.

Our first contact to get the ball rolling was in early December. We were given three steps to complete to initiate 360 Search. The first step was a phone call with our Serials Solutions Implementation Specialist to answer any questions as we began the process. The second step was to read the Connection List Instructions, then fill out the form to begin the set up process. The third step was to fill out a customization form. This allowed us to customize the 360 Search interface and the Vivisimo clustered results box that is a part of the interface. If we needed assistance completing these forms, we were to contact Serials Solutions for assistance. All three steps were completed without any problems on January 5th, 2009. We were told our 360 Search would be ready in six weeks.

I called our representative at Serials Solutions on March 5th since we had heard nothing by the end of February. I was connected with Mr. Peter Schmalzer, Manager, Library Implementation Services. He apologized for not getting back to us by the end of February and informed us that a personnel change had occurred in which he would now be our primary contact throughout the remainder of the implementation. From this point on, things started happening fast, and by March 13, we were live with 360 Search. A few customizations later and we had a search interface tailored as we wanted it.

Details of our implementation and customization follow. After Serials Solutions was finished processing our connection list, we were asked to get our OCLC resources authenticated. This required our OCLC authorization number and FirstSearch service patron password. These authentication values were to allow access to our resources on OCLC's Z39.50 server for the purposes of federated search. After providing these values, I was informed our data would be imported that same day and testing would begin. Our 360Search would be live by the end of the week.

I received an email from Peter informing me that our 360 Search interface was up and running. Included was an excel spreadsheet showing the connection status of each database as working, in testing (Elsevier Science Direct), and in development (BioOne.1, and our OPAC). Detailed instructions were included covering connections, customization, remote access, and the expected user experience. The implementation and customization that followed was a smooth process punctuated by a flurry of emails and a few phone calls. Within six workdays, we had a finished product that worked for us. The first thing we did was to enable remote access. This required copying the three correctly formatted lines included in the email into our ezproxy config file.

T 360 Search
U http://bz4gq2vk7d.cs.Serials Solutions.com/
HJ bz4gq2vk7d.cs.Serials Solutions.com/

I then added a proxied link to 360 Search to our electronic databases page. I also included the url to our library banner jpeg that is located on our server. This banner appears at the top of our 360 Search page.

When we received our live 360 Search page, the database lists were arranged by subject and the default search to be performed on each selected database was by title. Included in the databases listed was a link to our opac, which was still in development. Since the link did not work yet, I requested that it be removed. I was informed that the link would go live the moment development was finished. There was no date given however as to when we could expect this so I affirmed my request to have it removed until ready to avoid any confusion. I also noticed two databases were left off our initial connection list. I forwarded these along. All in all about eight emails passed back and forth this day and by the next day, all the customizations and additions were live.

We tested for a few days and after another flurry of emails over a period of three days we had finalized our customization. The first change we made in this second round was to request that the default search be changed from title to keyword. Since our library's electronic database page is arranged by areas of study and not by subject, I requested that the text 'Search by subject' be changed to 'Area of Study'. I also included a new list of database groupings showing how they should appear under each area.

One concern we had was that there was no descriptive text on the 360 Search page to help get a researcher started. What were they supposed to do with this list? While we did include a link on our database page to 360 Search help pages next to the 360 Search link, we felt that a short paragraph describing the mechanics of database selection should appear on the page itself. About a half hour after sending this email Peter called me so we could discuss my customization request live. I was informed that the 360 Search page was very limited in its ability to include additional text outside of the database links and descriptions. I was given the option of adding a short paragraph just below the banner, which was the only place the page would accept text. We looked at this possibility and I inquired whether we could alter the database descriptions to include some instructional text as an option to including text with the banner image. This was indeed possible and I sent a request to have a short descriptive paragraph be placed at the 'Select all' link on both the basic and advanced search pages. I included this document as an attachment to show exactly what I was looking for:

Select All - searches all areas of study shown below

Or **select the area/s of study below** using the check boxes.
To select from among the databases listed under each area of study, click on the area of study link.

General Databases
Agriculture & Natural Resources
Business & Computer Technologies
Culinary Arts, Hospitality and Tourism
Early Childhood
Liberal Arts and Sciences
News/Current Events
Other Databases - Other Databases

Bold text wasn't possible, nor were the line breaks as I showed them, but the text was included as written and offers a little helpful hint. Peter sent me back an image of how this would look for my approval.

Note the last selection, 'Other Databases.' We had four databases that were on our original connection list that were not included in any of our other groupings. 360Search automatically creates an 'other Databases' group as a default for these additional databases.

In addition, over these three days of customization, I asked about how to go about removing databases from the lists. This was now March 17th, and we were to lose access to some NOVEL databases on April 1st. I wanted to be sure I could remove them quickly and easily. I was informed that all I had to do was to go into the Serials Solutions client center and select 'not tracked' for any databases we were discontinuing. They would be gone the next day.

Our experience with the implementation of 360 Search was very positive. Communication was quick and helpful, designed to get us up and running quickly.

Our goals for 360 Search are to make the selection of databases for the searcher as transparent as

possible. The ability to search more than one database at a time will allow for less time that the student will spend trying to select the proper database to search. It will also help to eliminate lazy searching where a student simply searches the first database they find. We also hope to use the 360 Search as a tool to assist students in selecting the best databases to do their research. They may then continue their research in databases that offer the best results affording them the ability of using the individual databases' more powerful features such as limiting to peer reviewed journals. We were live with our customized 360 Search on March 24, 2009.

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