What's New for Summon & Intota/360 Services

January 2021
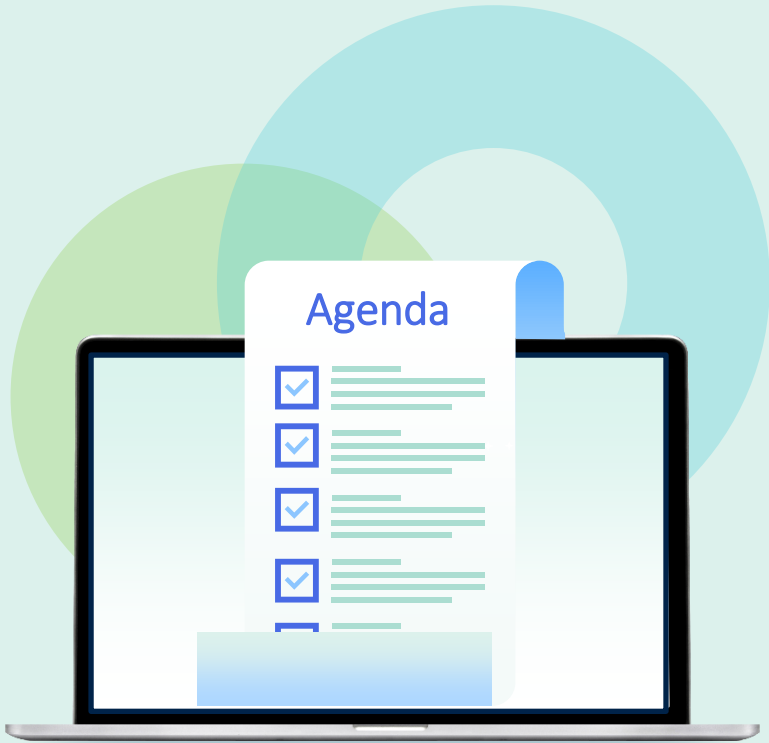
What's New For Summon

Brent D. Cook
Director, Product Management
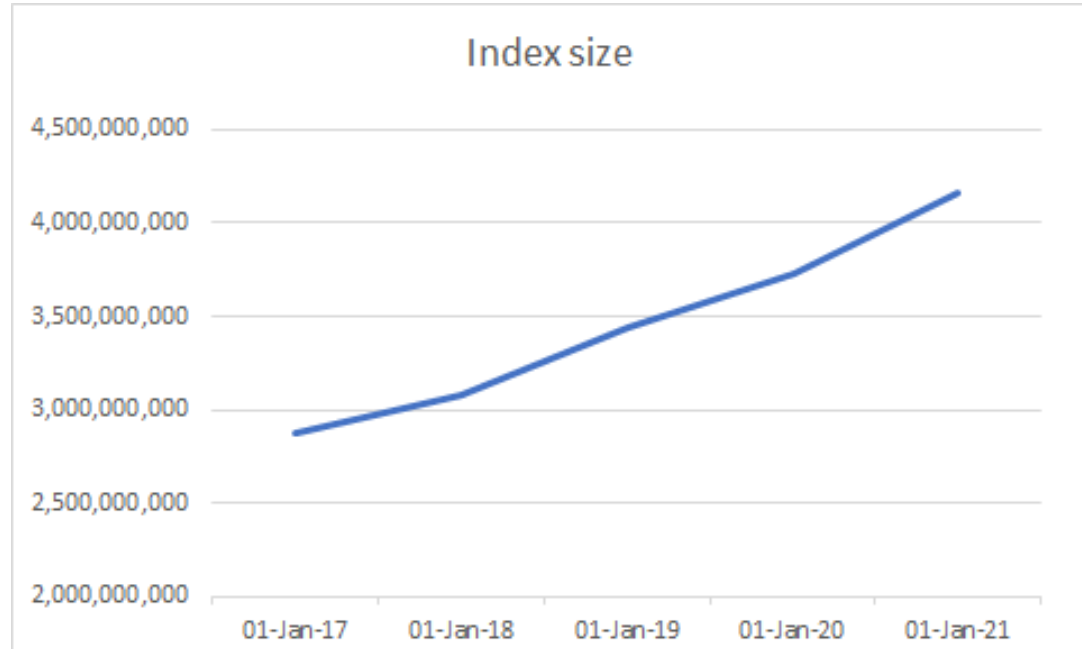Summon

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- Review 2020 accomplishments
  - Content Growth
  - New Summon Functionality
  - 360/Intota Enhancements
- A look ahead
  - 360/Intota Roadmap
  - Summon February Release
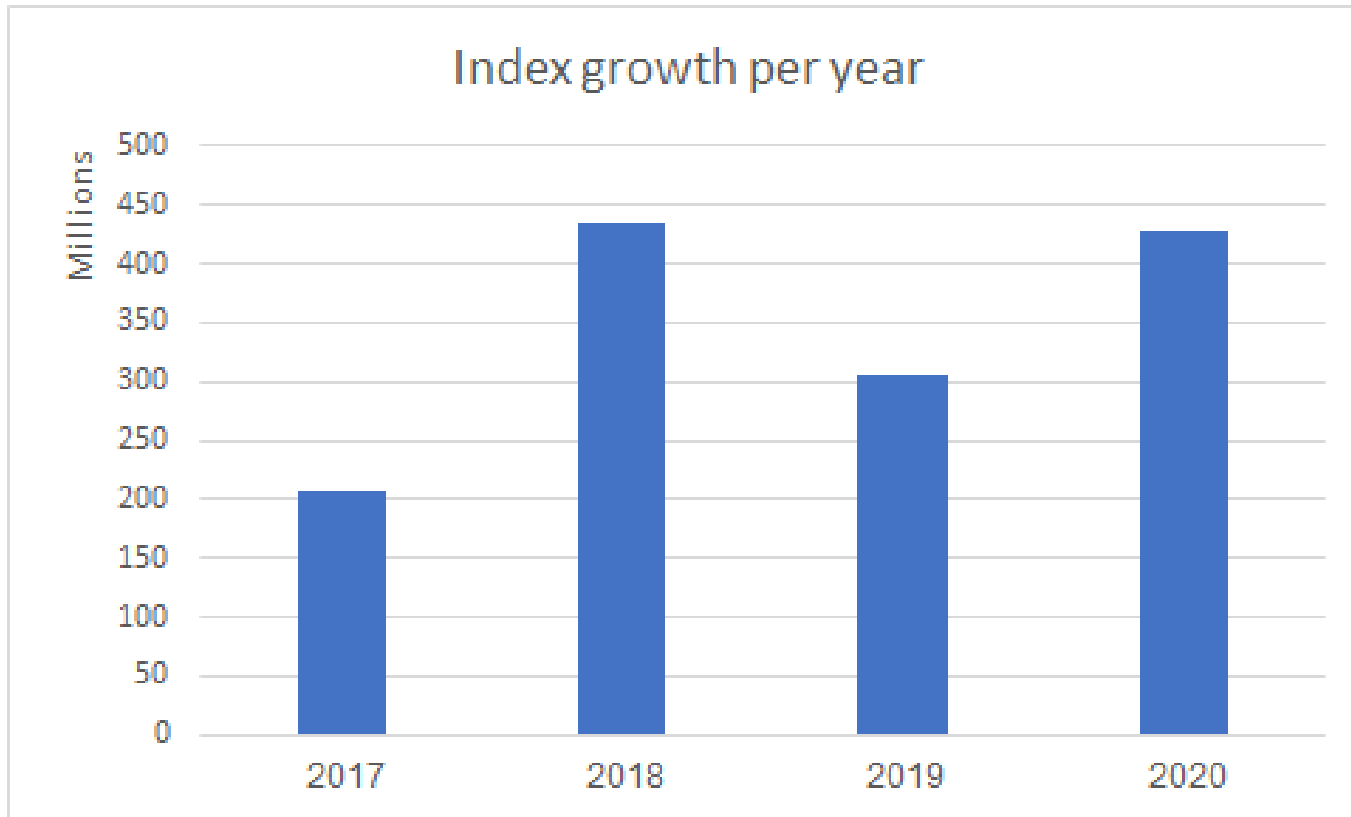 - Summon Features Under Consideration
- Questions?

Content Growth in 2020

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Content Growth

- CDI:
  - 4.2 billion records
  - ~420 million records added annually
- 360 KB:
  - 33,000 collections
  - 40 million titles

Index size

4,500,000,000	
4,000,000,000	
3,500,000,000	
3,000,000,000	
2,500,000,000	
2,000,000,000	

01-Jan-17   01-Jan-18   01-Jan-19   01-Jan-20   01-Jan-21

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Central Discovery Index Growth

Index growth per year

Summon and the Launch of CDI in 2020

Central Discovery Index (CDI) Launched in February

- Summon customers went live with CDI on February 5, 2020

- Includes:

  - Improved performance and an upgrade to SOLR 7

  - New facets
    - Author/creator
    - Collection (Database)
    - The ability to sort results by title or author

  - Match & Merge improvements

  - The ability to search for authors or co-authors by ORCIDs

  - New content providers and institutional repositories

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New Facets

- Author/creator

- Collection (Database)

- The ability to sort results by title or author

- Recently added items facet

Match & Merge Improvements to Reduce Duplicates

- Added newsletters to merge process
  - Reduce the overall footprint of these content types
- Improving subtitle handling
  - Reduce number of merges prevented by variations in the subtitles
- Increased overmatch limit
  - Improves matching of records with exceptionally large numbers of duplicates

Cancer: The RAS Renaissance
by Ledford, Heidi
Nature, ISSN 0028-0836, 04/2015, Volume 520, Issue 7547, pp. 278-280

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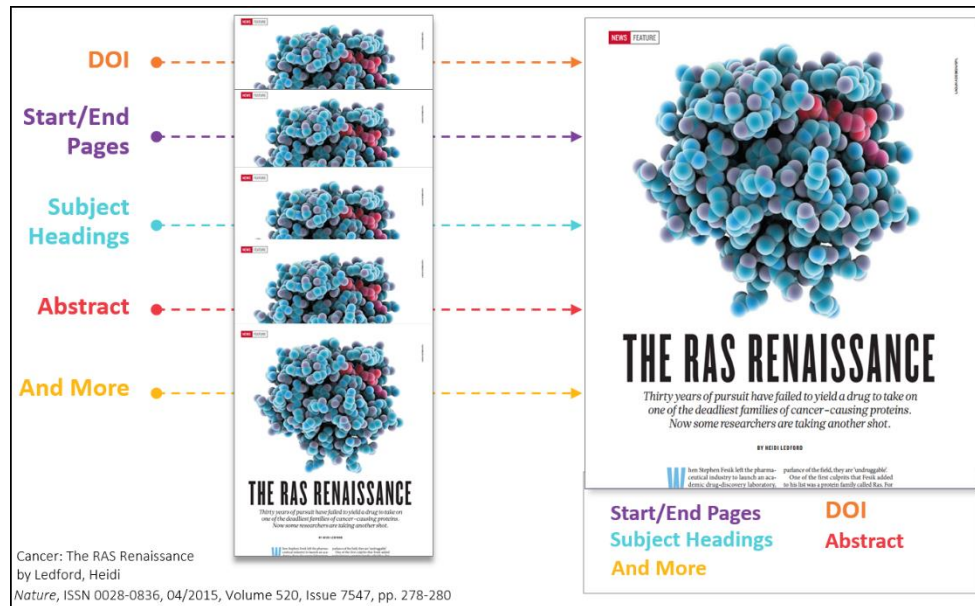
Match & Merge Improvements to Reduce Duplicates

- Relaxed language matching
  - Resolved discrepancy between Language Detected and sys_language

- Standardized quotation marks
  - Ensure different formats (" vs " vs ") don't prevent merging

- Better handling of synonyms
  - Color vs. Colour
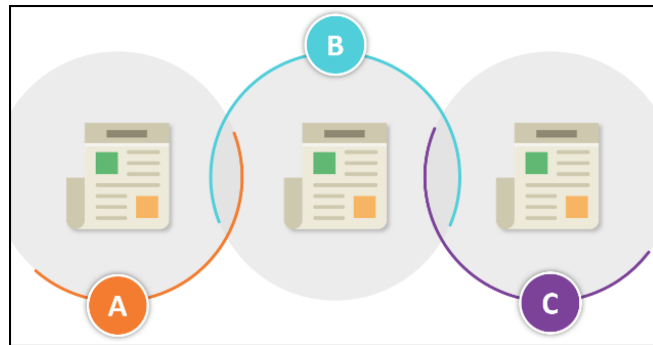
Summon Over Alma: Add Section number to Course Reserves page

USER EXPERIENCE

Customer Value

- Simplify finding course materials by including section numbers with Course ID

Feature Highlights

- Display of multiple Section Numbers with each result in the Course Reserves page

WhatsApp Integration

Customer Value

- Use WhatsApp for chat with patrons for real-time assistance regardless of where they are accessing your content from

Feature Highlights

- Simple integration allows for user to launch WhatsApp chat widget using WhatsApp API

A-Z List   RefWorks Log In   Feedback   Help

Your Message:

Optional

Start WhatsApp Chat

From Wikipedia

Marmot

Marmots are relatively large ground squirrels in the genus "Marmota", with 15 species living in Asia, Europe and North America. These herbivores are active during the summer when often found in groups, but are not seen during the winter when they hibernate underground. They are the heaviest members of the squirrel family.

Read more

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Improve peer-review labeling

USER EXPERIENCE

Customer Value

- Quickly identify peer-reviewed content within Summon results.

108,784 results sorted by relevance

online

1   Academic **Plastic Surg**
    Retention
    by Chen, Jenny T; Girotto, John

    Plastic and Reconstructive S

    PEER-REVIEW
    OPEN ACCESS   BACKGROUND:A critical e
                   surgery program is the qua

Feature Highlights

- Clearly label peer-reviewed content
- Functionality in addition to peer review facet

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Configuration of peer review labeling

- In the Admin Console under Settings > Search Results

- Controls for Open Access Indicator and Peer Review Indicator are found at the bottom of that tile

Persistent Search Refinements

Customer Value

- Allows for moving dynamically between basic and advanced search, bringing any refinements along with each search

Feature Highlights

- Consistency in application of facets and inputs across basic and advanced searches
- Retention of search parameters as the user moves between search screens

Persistent Search Refinements
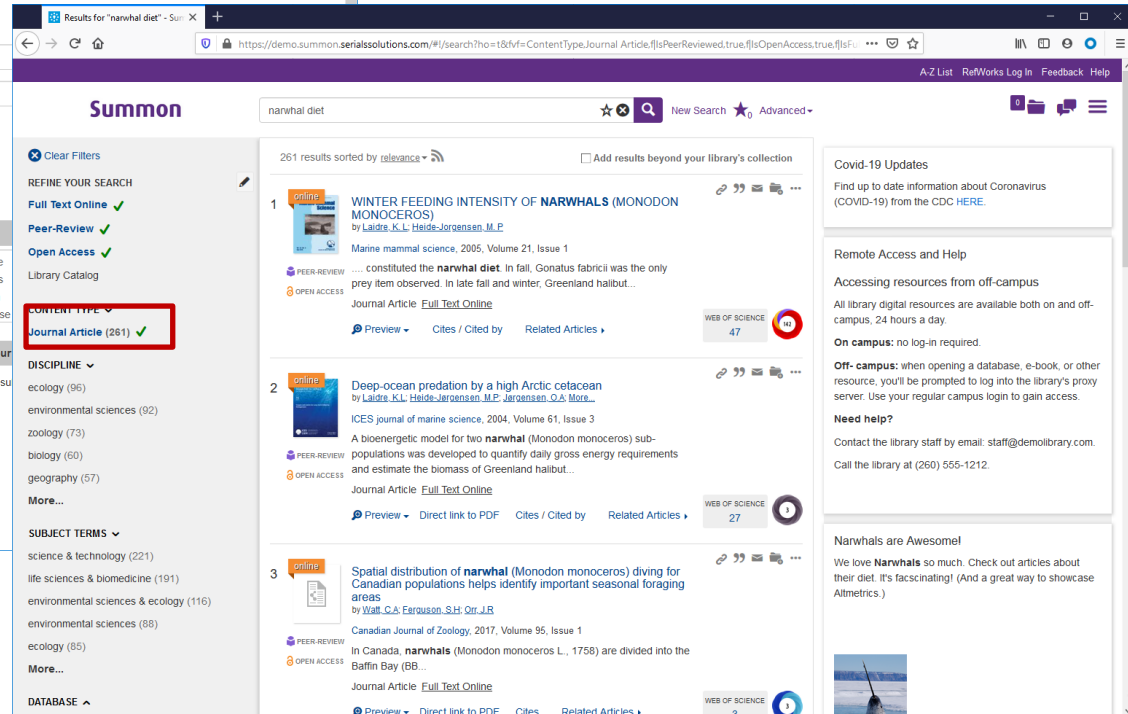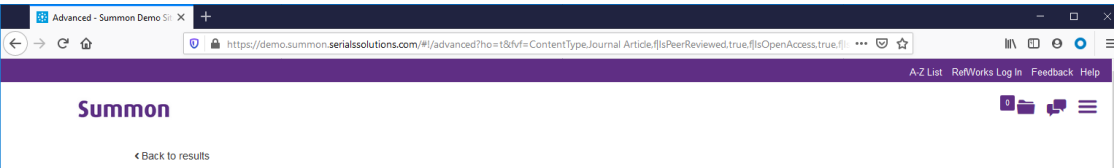
Databases A-Z List within Summon

SEARCH AND EXPLORING

Customer Value

- Expose all resources they have access to for the end patron

Feature Highlights

- Provide pathway to discover A to Z list of all databases

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Mechanism for Best Bets to 'harvest' LibAnswers FAQs

OPEN SYSTEM

Customer Value

- Easily find and implement new FAQs quickly using existing systems

Feature Highlights

- Use LibAnswers API to harvest LibAnswers to include in Best Bets
- Generate keywords using the metadata from LibAnswers

Summon™ Editor   SETTINGS   MAPPING   PAGES   USAGE   TRANSLATIONS   RECOMMENDER   CONTENT INGESTION

DATABASES   BEST BETS   SPRINGSHARE

LibAnswers settings

The Springshare LibAnswers service requires an active subscription. Provide your API details in the following fields to be able to harvest LibAnswers:

API URL	Something like https://{your_url}/api/1.1
Client ID	
Secret key	

Test credentials   First verify the SpringShare credentials.

Harvest LibAnswers   Harvest the SpringShare LibAnswers to the Best Bets section.

Harvesting might take up to a few minutes (often much shorter), please wait for the loading screen to close.
Note that there are limitations to the size and content of the question & answers:

- Question / title: 80 characters
- Answer / description: 1000 characters (note that this includes possible HTML markup characters)
- Tag / topic: 50 characters
- Images will be removed.
- Only the first 500 questions will be imported.
- Possibly problematic HTML tags are removed, like 'script', 'iframe'. Also some attribute can be removed like 'data-*' or 'style'. After harvesting, this will be reported as '(HTML was santized)' in the harvest status.

If the LibAnswer record exceeds the size, it will not be imported. You will be informed in case this happens after harvesting.
For more info see the Ex Libris Knowledge Center article
To view or edit the results, go to the Best Bets section

Save credentials   Save the provided credentials for future use.

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Upgrade from OBI to OAS

2020 Achievements for 360 and Intota Services

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360 and Intota Services

*Created as the **easiest** and most **effective** way to manage your electronic resources*

201M	**47M**	**38M**	**1700**
Links resolved in the last year	**Ejournal, ebook, and videos titles in the 360 KB**	**EJP searches in the last year**	**Libraries receive custom MARC records monthly**

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Value: 360 KB

41K

Provider databases
Regional variations

600

Open Access
databases

7K

Providers
Hierarchical inheritance

47M

Ejournals
Ebooks
Videos

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Time Savings: UI Improvements

- Access Summon Analytics directly from Client Center
  - Prevent unauthorized users from using the Summon Customizer

Extended Chat Hours Now Available

- We have expanded hours available for online, **Live Chat Support** for Summon, 360, and Intota service questions.

- The 1-1 online chat is now available Monday through Friday during the periods of:
  - 9:00 – 16:00 CEST (Berlin)
  - 9:00 – 17:00 PDT (San Francisco)

- Real-time conversation with a Support expert
- Reduce or eliminate the back-and-forth emails
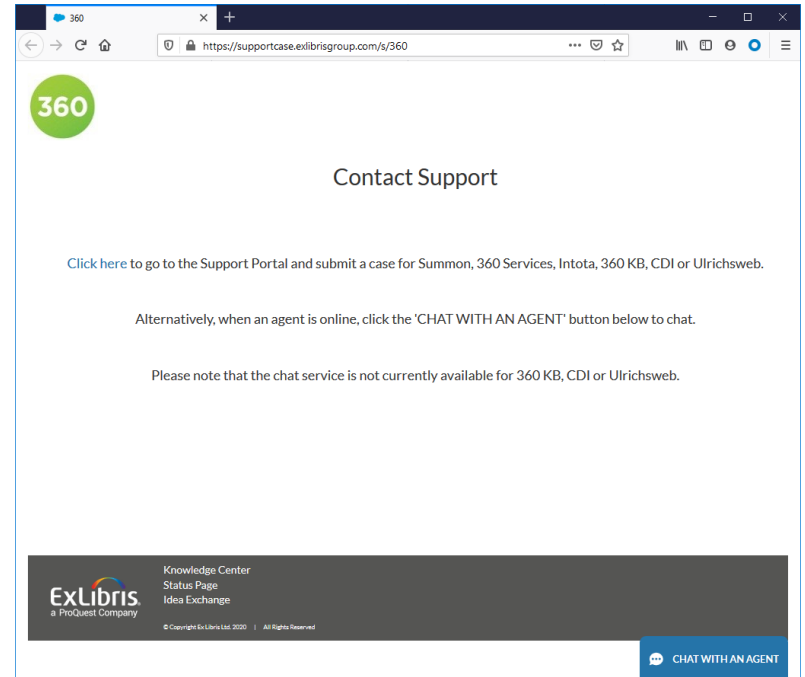
How to Use Chat

- You can access Live Chat Support through the embedded "Contact Us" links located in the 360 Client Center and Intota.

- You can also bookmark and visit https://supportcase.exlibrisgroup.com/s/360 or https://supportcase.exlibrisgroup.com/s/intota.
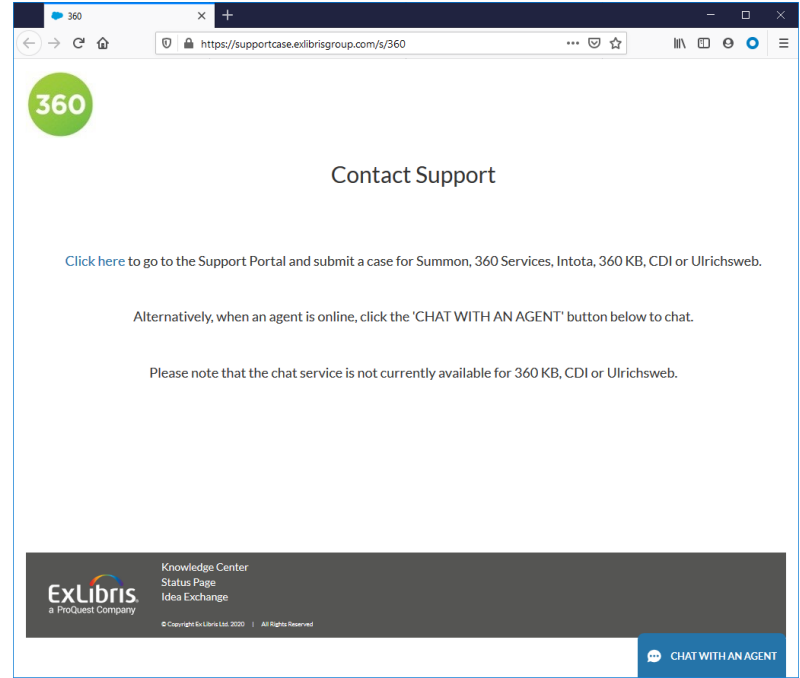
How to Use Chat

- Once you click on the link just look in the lower-right hand corner of the page to open the chat.

- As a reminder, please submit a support case if you have a 360 KB content or Central Discovery Index (CDI) question.
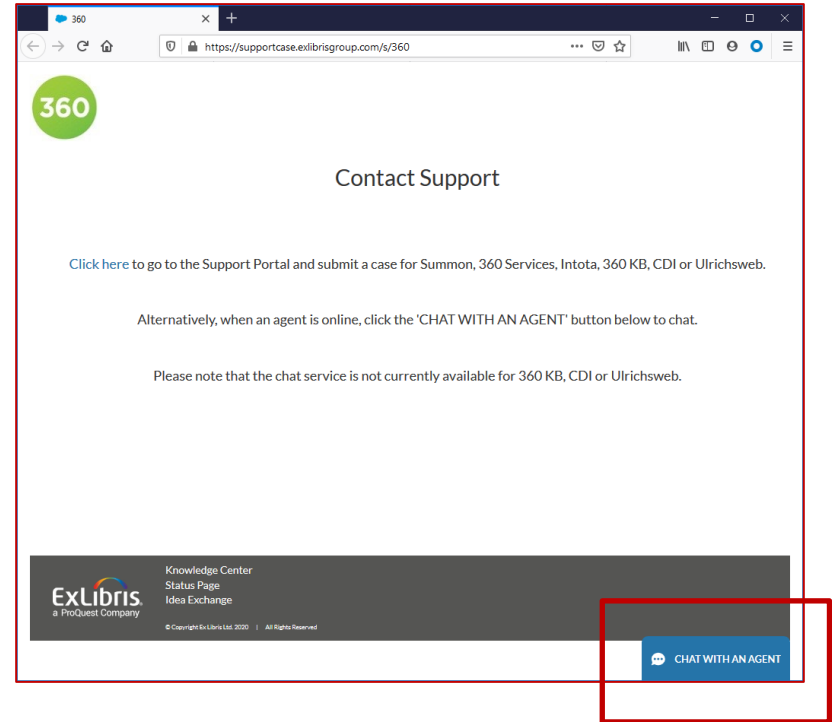
360 API

- Continued Ex Libris's commitment to openness with early rollout of a new API for querying a library's electronic resources and providers

- Read-only access to the library profile's subscribed
  - Providers
  - Databases
  - Titles
  - … and associated metadata

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Customer Enhancements

- Overlap Analysis: add "Database Name Contains" as search criteria when adding a database to the comparison list
  - Previously only "Database Begins With"

Customer Enhancements

- Displays most recent full update of resources

360 and Intota Services 2021 Roadmap

January Update

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Roadmap Confidentiality

The information provided here gives a high level view of 360 & Intota Services, and Intota Assessment's planned future roadmap and functional offerings. The information in this document is confidential and proprietary to Ex Libris.

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2021 Overview

2021 H1

- Rollout of COUNTER r5 reports
- General availability of the new 360 API for Library Holdings
- Video titles in the 360 MARC Updates service
- Overlap Analysis results separated by format
- "View Changes" export option

2021 H2

- Filter out "Not Tracked" titles from the EJP autocomplete suggestions
- Add Videos only search option to the EJP
- 360 Link ILL form enhancement
- Option to display most recent coverage option in the EJP
- Ability to upload Database Details report

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COUNTER r5 Reports Rollout

What's New

Intota Assessment reports reflecting the new standard's measurements and metrics

Highlights

Ebook, ejournal, and database reports with calculated Cost Per Use

R5 metrics available for custom reports

Impact

Libraries can take advantage of their e-resource holdings metadata for special projects or downstream applications

General Availability of the New 360 API for Library Holdings

What's New

Open API for 360 and Intota libraries to query the details of their library profile holdings

Highlights

Collect information regarding
- Providers
- Databases
- Titles

Impact

Libraries can take advantage of their e-resource holdings metadata for special projects or downstream applications

Video Titles in the 360 MARC Updates Service*

What's New

Bibliographic records for video titles will be generated, in addition to the current journal and book titles

Highlights

Records adhere to metadata description best practices for videos, and are added/updated deleted per existing service processing rules

Impact

Enables easier discovery of video titles, a format whose usage is surging

*Subscription details will be forthcoming.

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Overlap Analysis Results Separated by Format

What's New

Option to separate the results of Overlap Analysis by format rather than intermixing all titles

Highlights

Elect to run Overlap Analysis against just one format type, or include all format types and then filter results by format type

Impact

Easier view into collection holdings by grouping like formats together

"View Changes" Export Option

What's New	Highlights	Impact
Ability to export the details of the View Changes audit log	Fulfills a long-standing enhancement to output audit log details in a spreadsheet-friendly format	Allow users to filter, search, and gather basic statistics for the View Changes entries

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Summon Features Under Consideration

February Release and Summon 2021 Roadmap

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Targeted Release Dates

- 2021 Planned Release Dates
  - February 3
  - May 12
  - August 4
  - November 3

- Maintenance releases on the first Wednesday of all other months when needed

February Release

- Scheduled for February 3 Release

  - Predominantly Maintenance Work

  - No Preview Environment

- Update to APA Citation Style, 7th Edition

NERS Enhancements

- Separate print from ebooks when searching

- Return all link options and allow client configuration

- Improved Corrected Spelling: Did You Mean enhancement

- Add ability to apply your EZproxy to the DOI field links in Summon search results

- Exact Search for Certain Fields

- Ability to remove the long URL when exporting from Summon to RefWorks

Additional Functionality

- Make "Best Bets" show up when tag keywords are present in search, not just when there's an exact match

- Improve DB Recommender activation process, ranking and curation of sources

- Search Results User Interface Refresh
  - Polish overall elements on the page
  - Accessibility Conformance and Remediation

Sierra Integration

Customer Value

- Better integration of library systems and Summon

Feature Highlights

- Allow for quicker, easier access to holding or checking out content
- Simplify administration by staff

Integration Solution and Scope

- Integration of Summon – Sierra includes:

    - Supporting single Summon-Sierra institution

    - Display availability (items and their availability) embedded in Summon

    - Support login in Summon

    - Allow request in BIB/ Volume level

    - Display of library account in Summon, allow actions (Renew, Cancel, Edit etc).

- Target for Initial Release for Early Access partners: End Q1 2021

    - Expanding to general availability in H2 2021

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2021 Summon Roadmap Overview Webinar

- Attend our upcoming webinar for breakdown of releases by quarter and finalized feature list for 2021

- Webinar Dates: February 10 and February 11
  - AMERICAS/APAC: February 10 at 4:00 pm (San Francisco); February 11 at 8:00 am (Beijing); 9:00 am (Tokyo); 11:00 am (Sydney) – [Register](#)
  - AMERICAS/EMEA: February 11 at 9:00 am (Chicago); 3:00 pm (London); 4:00 pm (Berlin) – [Register](#)
  - AMERICAS: February 11 at 10:00 am (San Francisco); 1:00 pm (New York) – [Register](#)

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Questions?

Thank you!

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