

What's New for Summon & Intota/360 Services

January 2021

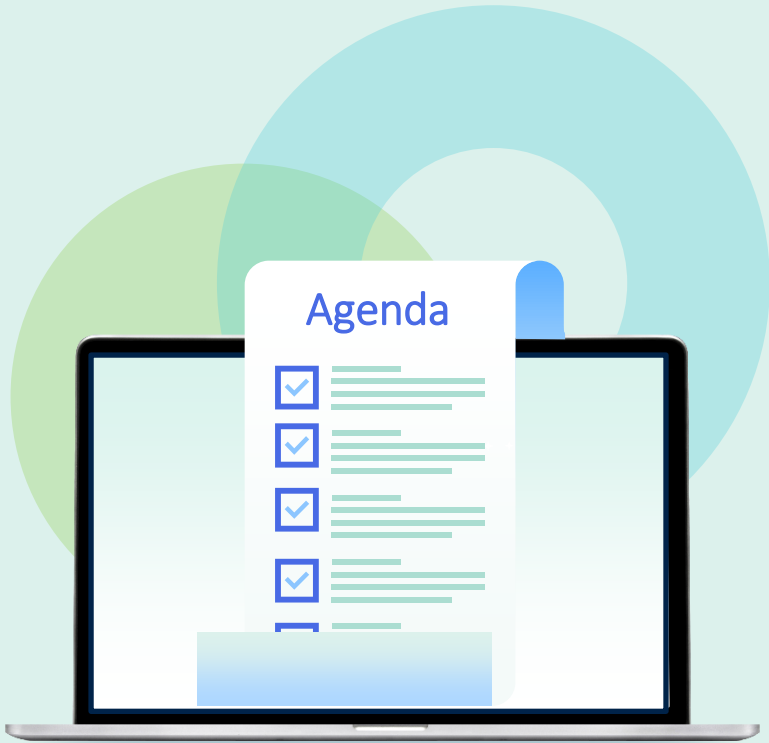


What's New For Summon



Brent D. Cook
Director, Product Management
Summon





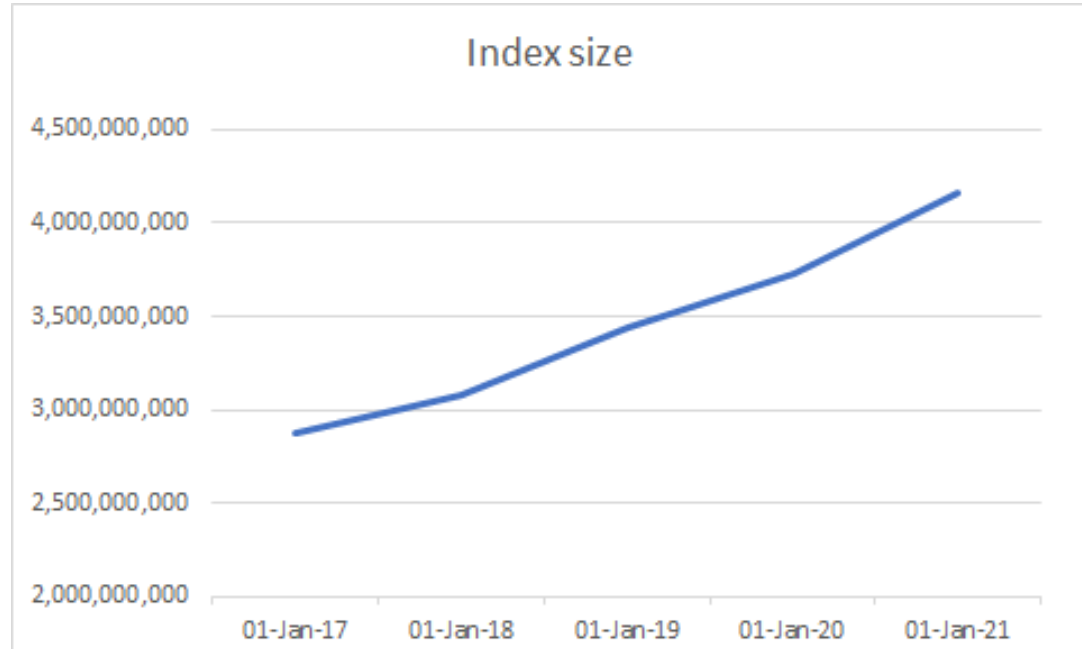
- Review 2020 accomplishments
 - Content Growth
 - New Summon Functionality
 - 360/Intota Enhancements
- A look ahead
 - 360/Intota Roadmap
 - Summon February Release
 - Summon Features Under Consideration
- Questions?



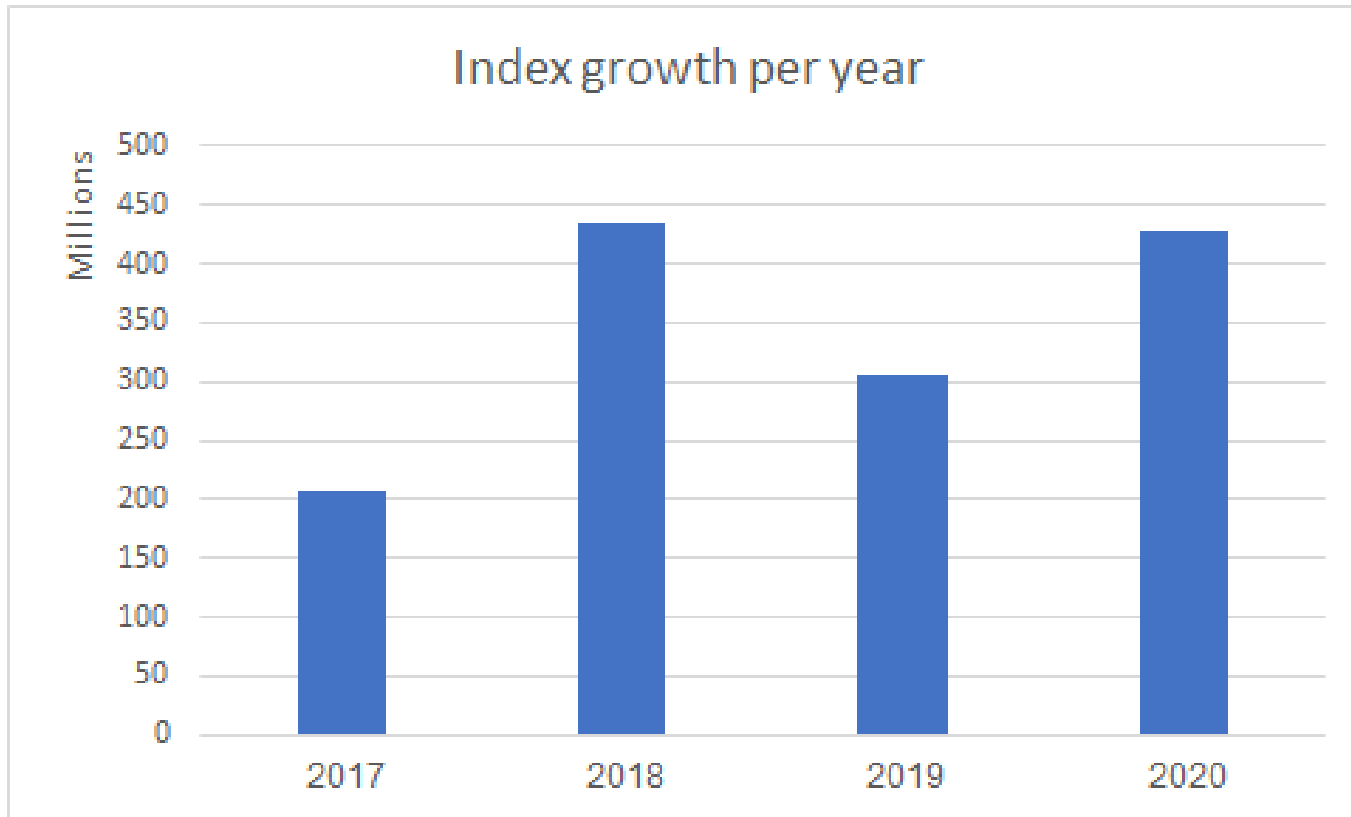
Content Growth in 2020

Content Growth

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



Central Discovery Index Growth





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 ORCIDiDs
 - New content providers and institutional repositories

New Facets

- Author/creator
- Collection (Database)
- The ability to sort results by title or author
- Recently added items facet

Settings

General
Search Results
Logos
Authentication
Facets
Reworks
Syndetics
Languages
Participant Record Prioritization
Citation Formats
Advanced Search
Refine Your Search
Custom Link
Topics
Resource Link Prioritization
A&I Detail Page
Transliteration (880 Fields)
Configuration (read only)

Facets

CUSTOM Contextual Faceting Enabled ON On Off

DEFAULT Refine Your Search Filters Enabled ON

DEFAULT Contextual Faceting for Union Catalog Enabled ON

CUSTOM Facets

Enabled	Disabled
<input type="text" value="ContentType"/>	<input type="text" value="Course Instructor"/>
<input type="text" value="Library"/>	<input type="text" value="Course Name and Number"/>
<input type="text" value="Publication Date"/>	<input type="text" value="Institution"/>
<input type="text" value="Discipline"/>	
<input type="text" value="SubjectTerms"/>	
<input type="text" value="Author"/>	
<input type="text" value="Language"/>	
<input type="text" value="Collection"/>	

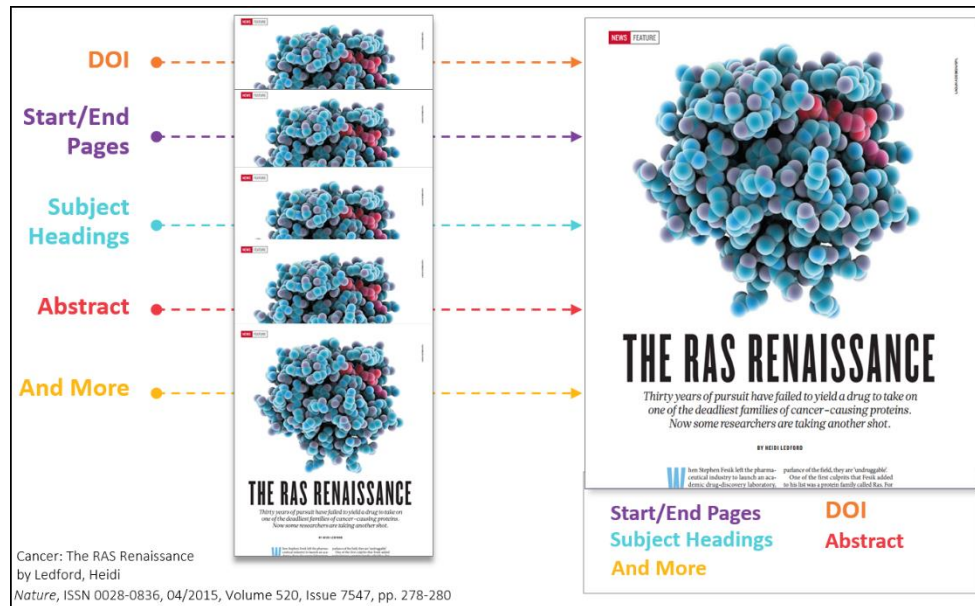
CUSTOM Facets Display

Expanded	Collapsed
<input type="text" value="ContentType"/>	<input type="text" value="Library"/>
<input type="text" value="Discipline"/>	<input type="text" value="Language"/>
<input type="text" value="Author"/>	<input type="text" value="Collection"/>
<input type="text" value="SubjectTerms"/>	

CUSTOM Library Location Whitelist

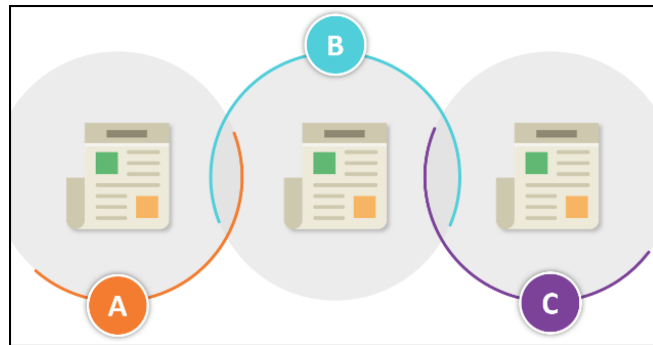
Match & Merge Improvements to Reduce Duplicates

- 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



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

NERs



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

Home Course Reserves A to Z list Feedback Help

Search by course name, description, or instructor

Course Reserves (265)

Course ID	Description	Instructor
AA-279C-01	Spacecraft Attitude Determination and Control	Julie, Mars
ACCT-212-01-04	Managerial Accounting: Base	Amber, Stars
ACCT-524-01	Individual Taxes and Financial Planning	Robert, Muler
ACCT-542-01	Corporate Taxes and Business Strategy	Jackie, Swanson
AMSTUD-160-01	Perspectives on American Identity	Peter Klein
ANTHRO-112-01	Public Archaeology: Market Street Chinatown Archaeology very long name very long name very long name very long name...	Klaus, Otter
CEE-263A-01	Air Pollution Modeling	Lillie, House
CME-206-01	Introduction to Numerical Methods for Engineering	Marie, Cure
CS-106A-01	Programming Methodology	Lisa, Morison
LAW-558-01	Workshop on International Security, Law, and Social Science	Sue, Nelson
LAW-588-01	Sports Law	Maxim, Dole
STRAMGT-353-01-03	Entrepreneurship: Formation of New Ventures	Sofie, Madeline
STRAMGT-353-01-03	Entrepreneurship: Formation of New Ventures	Henri, Mouse
STRAMGT-359-01	Aligning Start-ups with their Market	Niva, Teline
STRAMGT-359-01	Aligning Start-ups with their Market	Aleksandra, Novaya
STRAMGT-368-01	Strategic Management of Nonprofit Organizations and Social	Mila, Slovi

WhatsApp Integration



USER EXPERIENCE



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:

 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](#)

Improve peer-review labeling



USER EXPERIENCE

NERS



Customer
Value

- Quickly identify peer-reviewed content within Summon results.



Feature
Highlights

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

108,784 results sorted by relevance 

1  **Academic Plastic Surgery Retention**
by [Chen, Jenny T](#); [Girotto, John](#)

Plastic and Reconstructive S

PEER-REVIEW

OPEN ACCESS

BACKGROUND:A critical e
surgery program is the qua

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

The screenshot displays the 'Search Results' configuration page in the Admin Console. On the left, a sidebar lists various settings categories: Participant Record Prioritization, Citation Formats, Refworks, Syndetics, Spotighting, Advanced Search, Refine Your Search, and Custom Link. The main content area shows a list of settings, each with a 'CUSTOM' button, a description, a status (ON), and a toggle switch. The 'Open Access Indicator' and 'Peer Review Indicator' settings are highlighted with a red box. Both are currently set to 'ON' and have their toggle switches turned on.

Setting Name	Status	Toggle
Merged document physical priority	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Citation Trail	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Related Items	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Research Article Identifier	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Display eResource Public Notes	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Display eResource Location Notes	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Display Unpaywall PDFs	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Open Access Indicator	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Peer Review Indicator	ON	On <input checked="" type="radio"/> Off <input type="radio"/>

Persistent Search Refinements

NERS



SEARCH AND EXPLORING



Customer
Value

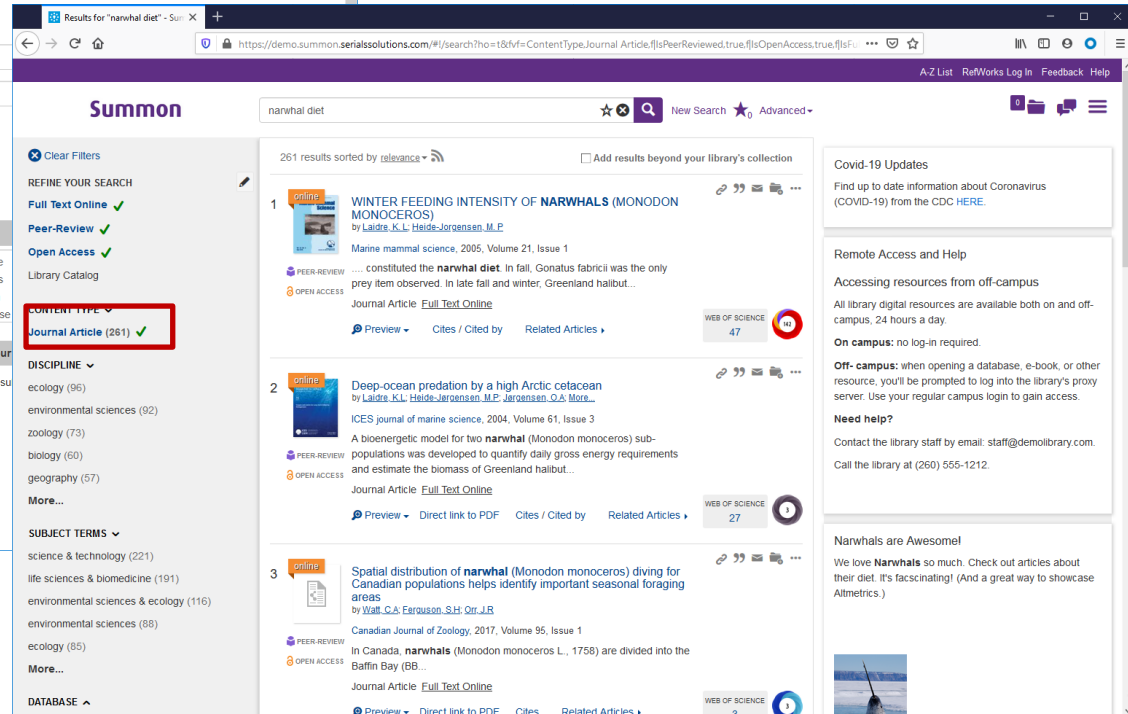
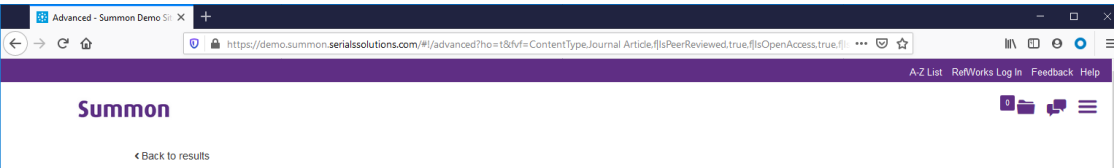
- Allows for moving dynamically between basic and advanced search, bringing any refinements along with each search



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



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

The screenshot shows a search results page for 'physics' in Summon. The search bar at the top contains 'physics' and shows 6,829,851 results sorted by relevance. A 'Database Recommendations' section is visible, listing 'Elsevier ScienceDirect Journals' as a full-text scientific database. Below this, two search results are displayed. The first result is 'Direct dynamical energy cascade in the modified KdV equation' by Dubykh, Denis; Tobisch, Elena, published in Physica D, 05/2018, Volume 297. The second result is 'Dispersive shallow water wave modelling. Part III: Model derivation on a globally spherical geometry' by Khakimzhanov, Gavar; Dubykh, Denis; Fedotova, Zinaida, published in Communications in computational physics, 07/2017, Volume 23, Issue 2. On the right side of the screenshot, a 'Database finder' sidebar is highlighted with a red box. It shows a search for 'physics' and lists database results, including a detailed description of the 'Applied Science & Technology Index' database.

Mechanism for Best Bets to 'harvest' LibAnswers FAQs



NERs



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

A screenshot of the 'Summon™ Editor' interface, specifically the 'LibAnswers settings' page. The page has a dark header with navigation tabs: 'SETTINGS', 'MAPPING', 'PAGES', 'USAGE', 'TRANSLATIONS', 'RECOMMENDER', and 'CONTENT INGESTION'. Below the header, there are sub-tabs: 'DATABASES', 'BEST BETS', and 'SPRINGSHARE'. The main content area is titled 'LibAnswers settings' and contains a form for configuring the LibAnswers API. The form includes fields for 'API URL', 'Client ID', and 'Secret key'. There are two buttons: 'Test credentials' and 'Harvest LibAnswers'. Below the form, there is a section of text explaining the requirements for the SpringShare LibAnswers service and providing instructions on how to harvest FAQs. The text includes a note about harvesting time and a list of limitations for the harvested content, such as character limits and removal of certain HTML tags. At the bottom, there is a 'Save credentials' button and a note about saving the provided credentials for future use.

Upgrade from OBI to OAS

The screenshot displays the OAS (Open Access System) interface. At the top, there is a navigation bar with 'Catalog' and various menu options like 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. Below this is a breadcrumb trail showing the current location: 'Location /Shared Folders/Summon/Dashboards/Example Dashboard'. On the left, there is a 'Folders' pane showing a tree view of the system's structure, including 'My Folders', 'Shared Folders', 'Summon', 'Dashboards', and 'Example Dashboard'. Below the folders is a 'Tasks' pane with actions like 'Expand', 'Copy', 'Open', 'Rename', 'Export', 'Create Shortcut', 'Edit', and 'Properties'. The main content area shows a list of dashboard items: 'Actions', 'Device Usage', 'Facets', 'Popular Searches', 'Sessions', and 'Zero Result Searches'. The 'Example Dashboard' is selected, and its content is displayed below. The dashboard has a blue header with the title 'Example Dashboard' and navigation links. Below the header are tabs for 'Actions', 'Facets', 'Sessions', 'Popular Searches', and 'Zero Result Searches'. The 'Actions' tab is active, showing a bar chart titled 'Searches' and a data table. The bar chart shows the number of searches per month from July 2020 to January 2021. The data table provides a breakdown of search types: Click on recommended resource, Facet filtering, Click on title, and Basic search.

Searches

Month	Click on recommended resource	Facet filtering	Click on title	Basic search
Jul 2020	2,904	6	972	281
Aug 2020	1,360		359	139
Sep 2020	1,375	7	279	131
Oct 2020	1,684		469	173
Nov 2020	1,283	3	262	134
Dec 2020	4,880	2	267	3,968
Jan 2021			53	19



2020 Achievements for 360 and Intota Services

360 and Intota Services

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

201M

Links resolved in the last year

47M

Ejournal, ebook, and videos titles in the 360 KB

38M

EJP searches in the last year

1700

Libraries receive custom MARC records monthly

Value: 360 KB



41K

Provider databases
Regional variations

600

Open Access
databases

7K

Providers
Hierarchical inheritance

47M

Ejournals
Ebooks
Videos



Time Savings: UI Improvements

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

Amy Pemble

Account Details

- General
- Permissions
 - 360 Core Permissions**
 - 360 Resource Manager Permissions
 - Inheritance Permissions
 - Sharing Permissions
 - Email Notices

Statistics Tools View

360 Link Customization View/Edit

Data Management View

Data On Demand View/Edit

Date Format View/Edit

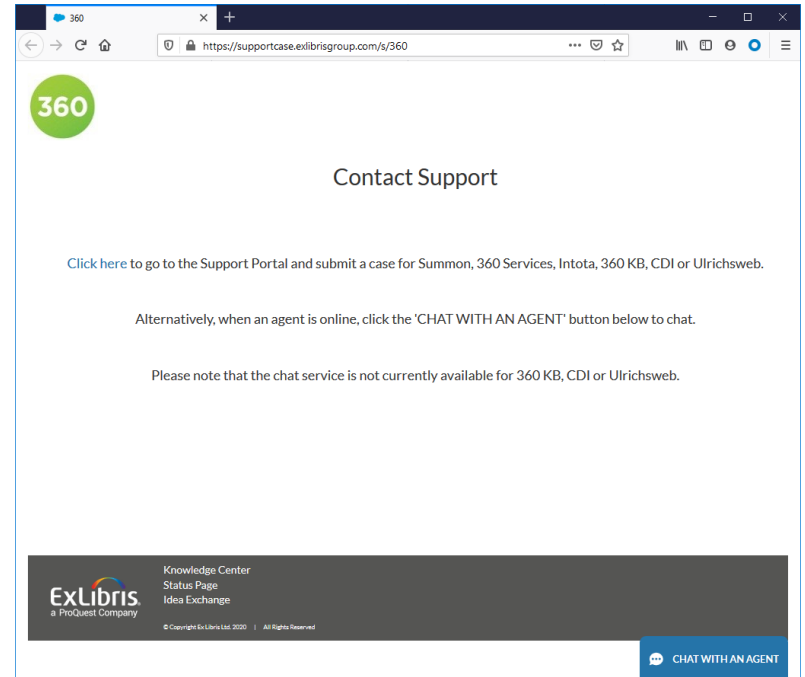
E-Journal Portal Customization View/Edit

Summon Customization View/Edit

Summon Usage Statistics View/Edit

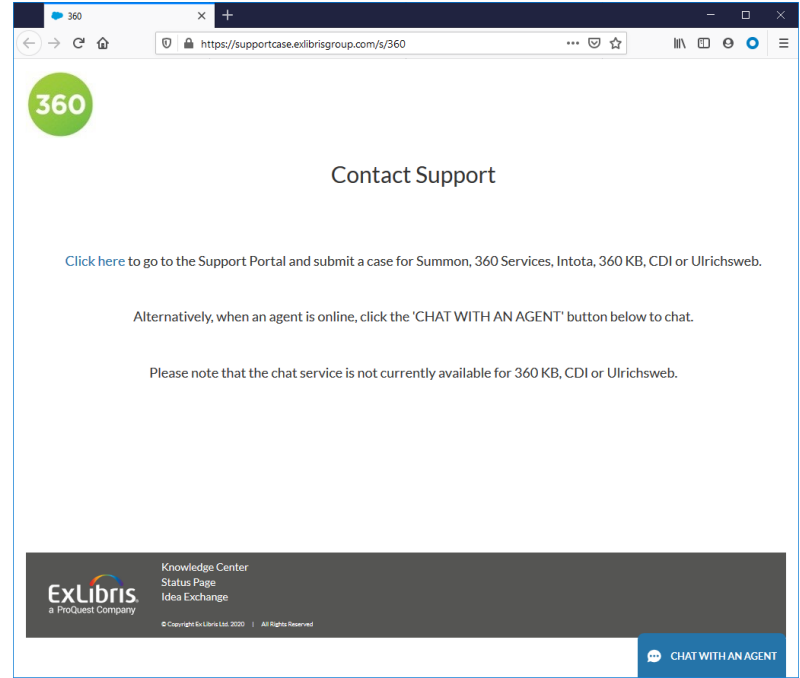
Extended Chat Hours Now Available

- 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



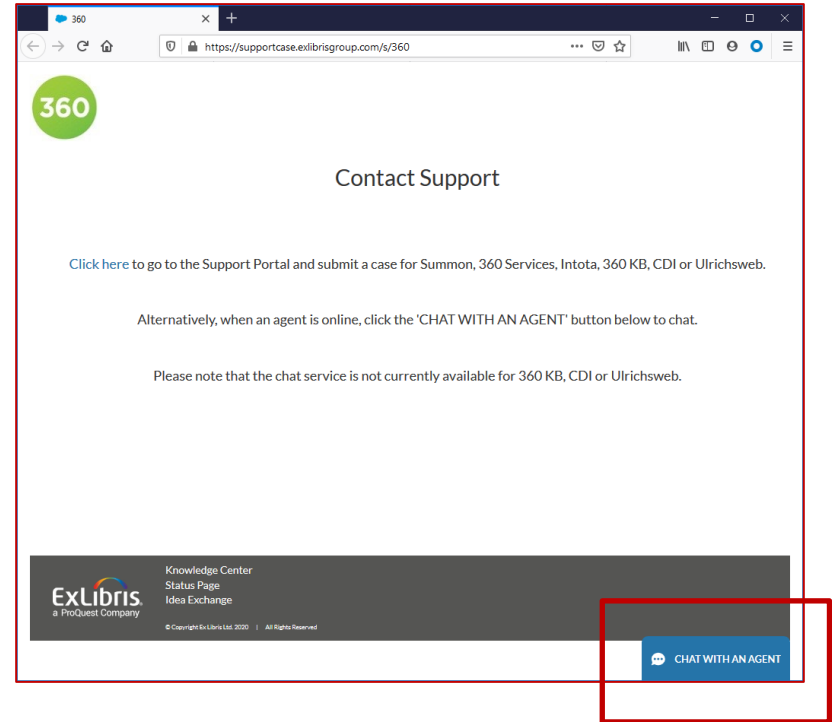
How to Use Chat

- 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

Customer Enhancements

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

[Home](#) > [Overlap Analysis](#) > [Add Databases](#)

Add Databases

Search By:

[<< Back to the Comparison List](#)

Add Databases

To add a database, search by database name, provider or status; and then select a database.

Customer Enhancements

- Displays most recent full update of resources

The screenshot shows the ProQuest interface for the ABI/INFORM Archive II database. The left sidebar contains a tree view with 'Database Details' expanded to 'General', which includes 'Titles (36)', 'Books (0)', 'Journals (36)', and 'Videos (0)'. The main content area displays the following information:

- Code** 87X
- Last Full Update** 01/25/2020 (highlighted in a red box)
- Provider** ProQuest
- Titles** 36
- Status** Subscribed
- Summon** ✓ 100% [View coverage](#)
- Display In:** 360 Core, 360 MARC Updates, Summon
- Default URL** <https://search.proquest.com/abiarchive2>

An 'Edit' button is visible in the top right corner of the main content area.



360 and Intota Services 2021 Roadmap

January Update

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

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

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

Ability to export the details of the View Changes audit log



Highlights

Fulfills a long-standing enhancement to output audit log details in a spreadsheet-friendly format



Impact

Allow users to filter, search, and gather basic statistics for the View Changes entries



Summon Features Under Consideration

February Release and Summon 2021 Roadmap

Roadmap Confidentiality

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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

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](#)



Questions?



Thank you!

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