

# What's New with Summon & 360/Intota Services

Amy Pemble | Director, Product Management  
Brent D. Cook | Director, Product Management, Summon

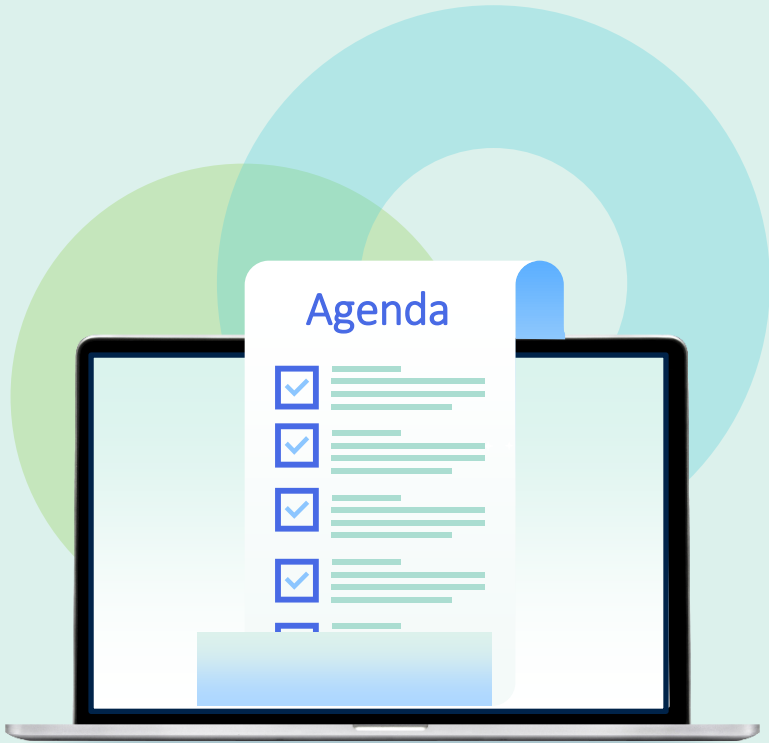




Brent D. Cook  
Director, Product Management  
Summon



Amy Pemble  
Director, Product Management  
Intota & 360 Services



## Summon

- Review accomplishments
  - New Summon Functionality
- A look ahead
  - Summon Roadmap Review
- 360 and Intota Services
- Questions?



# Review Recent Accomplishments

# The “New” Summon Experience

## A Refreshed User Interface Optimized for Usability

- Stylistic updates
- Facet Improvements
- Brief result display improvements
- Link display

The screenshot displays the Summon search results interface. On the left, a 'Refine your search' sidebar includes filters for 'Full Text Online', 'Peer-Review' (checked), 'Open Access', 'Library Catalog', 'Physical Books in Library Catalog', 'eBook Full Text Online', and 'Add results beyond your library's collection'. Below this is a 'Content Type' section with a 'Sort' dropdown, showing 'Journal Article' (587), 'Book Review' (11), and 'Conference Proceeding' (1). The main results area shows 8 results, sorted by relevance. The first result is a journal article from 'Ambio' titled 'Interactions of climate, socio-economics, and global mercury pollution in the...' by Dietz, Rune; Mosbech, Anders; Flora, Janne; et al. The second result is 'WINTER FEEDING INTENSITY OF NARWHALS (MONODON...' by Lairde, K. L.; Heide-Jørgensen, M. P. Each result includes a thumbnail, title, authors, journal information, and options for PDF, Full Text Online, and More Options.

# Summon Results Page: Before

Summon

narwhal diet


☆ ✕ 🔍 New Search ☆ 0 Advanced ▾




1,577 results sorted by [relevance](#) ▾

Add results beyond your library's collection



- 1   **Fatty acids and stable isotopes ( $\delta^{13}C$  and  $\delta^{15}N$ ) reveal temporal changes in narwhal (*Monodon monoceros*) diet linked to migration patterns**  
by [Watt, Courtney A](#); [Ferguson, Steven H](#)

Marine mammal science, 01/2015, Volume 31, Issue 1

 PEER-REVIEW ...—2011 we examined **diet** using fatty acids,  $\delta^{15}N$ , and  $\delta^{13}C$ , in **narwhals** from Baffin Bay (BB...

 OPEN ACCESS

Journal Article [Looking for Full Text](#)

 Preview ▾ [Direct link to PDF](#) [Cites / Cited by](#) [Related Articles](#) ▾

WEB OF SCIENCE  
15 



- 2   **WINTER FEEDING INTENSITY OF NARWHALS (MONODON MONOCEROS)**  
by [Laidre, K. L.](#); [Heide-Jørgensen, M. P.](#)

Marine mammal science, 01/2005, Volume 21, Issue 1

.... constituted the **narwhal diet**. In fall, *Gonatus fabricii* was the only prey item observed. In late fall and winter, Greenland halibut...


 PEER-REVIEW

Journal Article [Looking for Full Text](#)


 Preview ▾ [Cites / Cited by](#) [Related Articles](#) ▾

WEB OF SCIENCE  
50 




- 3   **Summer diet of the narwhal (*Monodon monoceros*) in Pond Inlet, northern Baffin Island**  
by [Finley, K. J.](#); [Gibb, E. J.](#)

Canadian journal of zoology, 12/1982, Volume 60, Issue 12

 PEER-REVIEW Stomach contents of 73 **narwhals** (*Monodon monoceros*) taken in Pond Inlet during June to September 1978–1979 were examined. Arctic cod (*Boreogadus saida*...

Journal Article [Looking for Full Text](#)

 Preview ▾ [Cited by](#) [Related Articles](#) ▾

## Covid-19 Updates

Find up to date information about Coronavirus (COVID-19) from the CDC [HERE](#).

## Remote Access and Help

### Accessing resources from off-campus

All library digital resources are available both on and off-campus, 24 hours a day.

**On campus:** no log-in required.

**Off-campus:** when opening a database, e-book, or other resource, you'll be prompted to log into the library's proxy server. Use your regular campus login to gain access.

### Need help?

Contact the library staff by email: [staff@demolibrary.com](mailto:staff@demolibrary.com).

Call the library at (260) 555-1212.

## REFINE YOUR SEARCH

Looking for Full Text

Peer-Review

Open Access

Library Catalog

Physical Books in Library Catalog

eBook Full Text Online

## CONTENT TYPE ▾

Journal Article (698)

Newspaper Article (471)

Dissertation/Thesis (134)

Magazine Article (94)

Book / eBook (18)

More...

## LIBRARY LOCATION ▾

## DISCIPLINE ▾

ecology (265)

zoology (241)

environmental sciences (201)

biology (170)

geography (137)

More...

# Summon Results Page: After

Summon

narwhal diet

X Options  New Search



## Refine your search

- Full Text Online
- Peer-Review
- Open Access
- Library Catalog
- Physical Books in Library Catalog
- eBook Full Text Online
- Add results beyond your library's collection


## Content Type

Sort 


 Filter list

- Journal Article 698
- Newspaper Article 471
- Dissertation/Thesis 134
- Magazine Article 94
- Book / eBook 18

## Library Location

1,577 results 

Save Search / View Saved

Sorted by **relevance** 

1



Fatty acids and stable isotopes ( $\delta^{13}C$  and  $\delta^{15}N$ ) reveal temporal changes in **narwhal** (Monodon monoceros) diet...

by Watt, Courtney A; Ferguson, Steven H

Marine mammal science, 01/2015, Volume 31, Issue 1

...-2011 we examined **diet** using fatty acids,  $\delta^{15}N$ , and  $\delta^{13}C$ , in **narwhals** from Baffin Bay (BB...

Journal Article

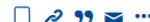
 Direct link to PDF

 Full Text Online


 Preview 

Cites / Cited by

Related Articles 



Online 

Peer-Review 

Open Access 

WEB OF SCIENCE

15



2



WINTER FEEDING INTENSITY OF **NARWHALS** (MONODON MONOCEROS)

by Laidre, K. L.; Heide-Jørgensen, M. P

Marine mammal science, 01/2005, Volume 21, Issue 1

.... constituted the **narwhal diet**. In fall, *Gonatus fabricii* was the only prey item observed. In late fall and winter, Greenland halibut...

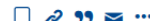
Journal Article

 Full Text Online


 Preview 

Cites / Cited by

Related Articles 



Online 

Peer-Review 

WEB OF SCIENCE

50

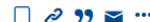


3



Summer **diet** of the **narwhal** (Monodon monoceros) in Pond Inlet, northern Baffin Island

by Finley, K. J.; Gibb, E. J



Online 

## Upcoming Events

- o 10/15 - Winter Quarter Course Registration Begins!
- o 10/31 - Halloween
- o 11/23-11/27 - Thanksgiving Break

## Library Policies

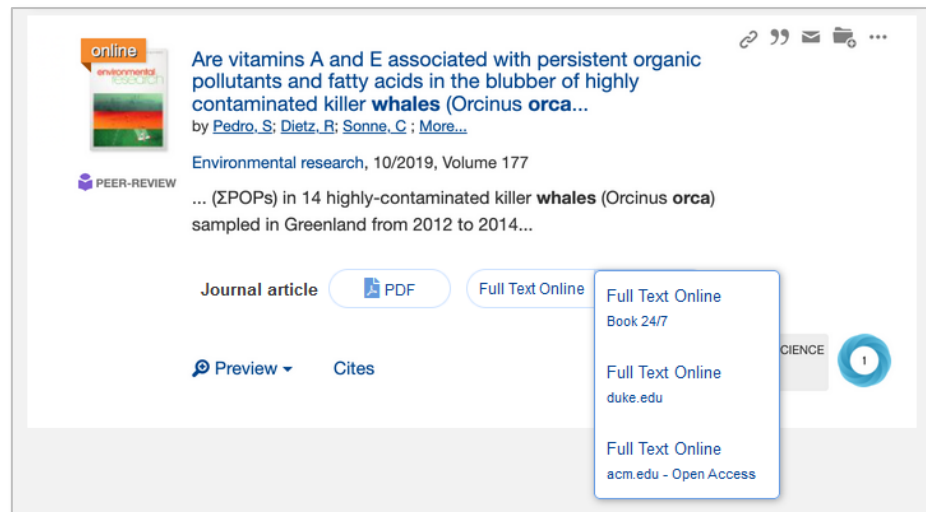
- o Books are due 2 weeks after checkout.
- o The library is a weapon-free zone!
- o No food, no drinks, no exceptions!

## New York Public Library

# Display All Links in Results

Display all full text links subscribed in the knowledgebase

- Maximize the use of the library's resources and ensure users successful access to content
- Provide multiple sources for the end user to choose
- Configurable by institution



The screenshot shows a search result for a journal article. The article title is "Are vitamins A and E associated with persistent organic pollutants and fatty acids in the blubber of highly contaminated killer whales (Orcinus orca...)" by Pedro, S.; Dietz, B.; Sonne, C.; More... It is from "Environmental research", 10/2019, Volume 177. The article is marked as "PEER-REVIEW". The abstract snippet reads: "... (ΣPOPs) in 14 highly-contaminated killer whales (Orcinus orca) sampled in Greenland from 2012 to 2014...". Below the article, there are buttons for "Journal article", "PDF", and "Full Text Online". A dropdown menu is open under "Full Text Online", showing three options: "Full Text Online Book 24/7", "Full Text Online duke.edu", and "Full Text Online acm.edu - Open Access".





# Include OpenURL with Show All Links Options

Ability to display all possible links for electronic content

- Sites can now include Open URL links under More Options for linking in brief result
- “Link Resolver” text is customizable by institution



3  **Online Behavioral Advertising: A Literature Review and Research Agenda**  
by Boerman, Sophie C; Kruikemeier, Sanne; Zuiderveen Borgesius, Frederik J  
Journal of Advertising, 07/2017, Volume 46, Issue 3  
Advertisers are increasingly monitoring people's online behavior and using the information collected to show people individually targeted advertisements.  
This...

Journal Article Full Text Online **More Options** ▾

Preview ▾ Cites / Cited by

- Full Text Online
- Taylor & Francis
- Link Resolver

4 **Correction: Fibrin Sealants in Dura Sealing: A Systematic Literature**



# Ability to Block Display of Subject Headings by Institution

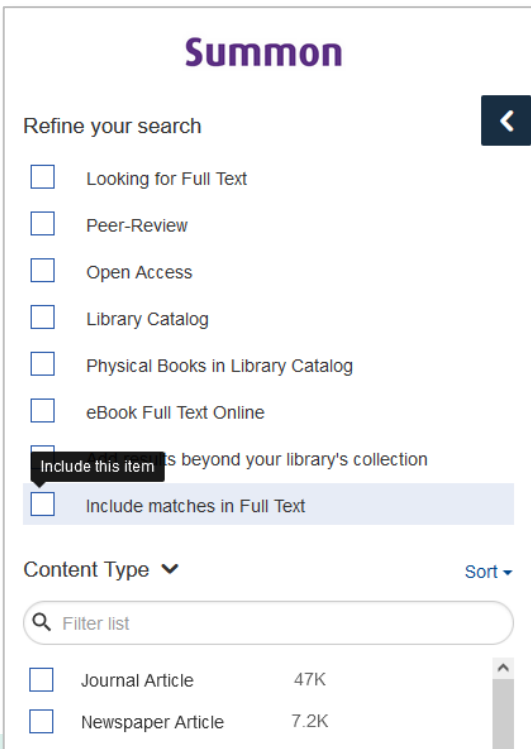
Manage subject terms that appear in the Facet Pane on the Summon Results Page

- Provide ability to block offensive terms in Subject Term facet
- Institutions can manage their specific block list for subject terms based on their specific needs
- Text is still indexed and used for relevance

The screenshot displays the 'Settings' interface for Ex Libris. On the left is a vertical navigation menu with the following items: General, Search Results, Logos, Subject Terms (highlighted), Authentication, Facets, Refworks, Syndetics, Languages, Participant Record Prioritization, Citation Formats, Advanced Search, Refine Your Search, and Custom Link. The main content area is titled 'Subject Terms' and features a 'CUSTOM' radio button and an 'Excluded Subjects' section. Below this is a large text input field labeled 'Blocked Subject Terms...'. At the bottom right of the main area are 'Save Settings' and 'Reset Form' buttons.

# Optional Full Text Searching

Users can choose if their searches should include or exclude records based on full text matches



**Summon**

Refine your search

- Looking for Full Text
- Peer-Review
- Open Access
- Library Catalog
- Physical Books in Library Catalog
- eBook Full Text Online
- Include this item is beyond your library's collection
- Include matches in Full Text

Content Type Sort

Filter list

<input type="checkbox"/> Journal Article	47K
<input type="checkbox"/> Newspaper Article	7.2K

- Faster, more targeted results for the end user
- Reduce long tail
- Faster response time
- Ability to expand results set by searching full text

# Optional Full Text Searching

The screenshot shows the Summon™ Editor interface with the 'Settings' menu open to 'Refine Your Search'. The 'Include Matches In Full Text Default' and 'Include Matches In Full Text Override' options are highlighted with a red box. The 'Include Matches In Full Text Default' option is currently set to 'OFF', and the 'Include Matches In Full Text Override' option is currently set to 'ON'.

Profile	Setting Name	Status	Control	Help
DEFAULT	Full Text Online Enabled	ON		?
CUSTOM	Limit To Scholarly Enabled	OFF	On <input type="radio"/> Off <input checked="" type="radio"/>	?
CUSTOM	Limit To Peer Reviewed Enabled	ON	On <input checked="" type="radio"/> Off <input type="radio"/>	?
DEFAULT	Exclude Newspaper Articles Enabled	ON		?
CUSTOM	Items in Catalog Enabled	ON	On <input checked="" type="radio"/> Off <input type="radio"/>	?
DEFAULT	Add Results Beyond Collection	ON		?
DEFAULT	Items at my Institution Enabled	OFF		?
CUSTOM	Open Access Enabled	ON	On <input checked="" type="radio"/> Off <input type="radio"/>	?
DEFAULT	Physical Books - Backend Processing	ON	On <input checked="" type="radio"/> Off <input type="radio"/>	?
CUSTOM	Physical Books Filter Enabled	ON	On <input checked="" type="radio"/> Off <input type="radio"/>	?
CUSTOM	eBooks Filter Enabled	ON	On <input checked="" type="radio"/> Off <input type="radio"/>	?
DEFAULT	Include Matches In Full Text Default	OFF		?
CUSTOM	Include Matches In Full Text Override	ON	On <input checked="" type="radio"/> Off <input type="radio"/>	?

Buttons: Save Settings, Reset Form

## To Configure

- In the Summon Admin Console under Settings > Refine Your Search
- “Include matches in Full Text Default” configures your default Summon search behavior
- “Include Matches in Full Text Override” configures the full text facet

# Optional Full Text Searching

## Best performance and most options

- Shortens the long tail and increases performance for the query; also allows users to add a full text search when they want

<input type="checkbox"/>	DEFAULT	Include Matches In Full Text Default	OFF	
<input checked="" type="checkbox"/>	CUSTOM	Include Matches In Full Text Override	ON	On <input checked="" type="radio"/> Off <input type="radio"/>

## Perform like Classic Summon Search

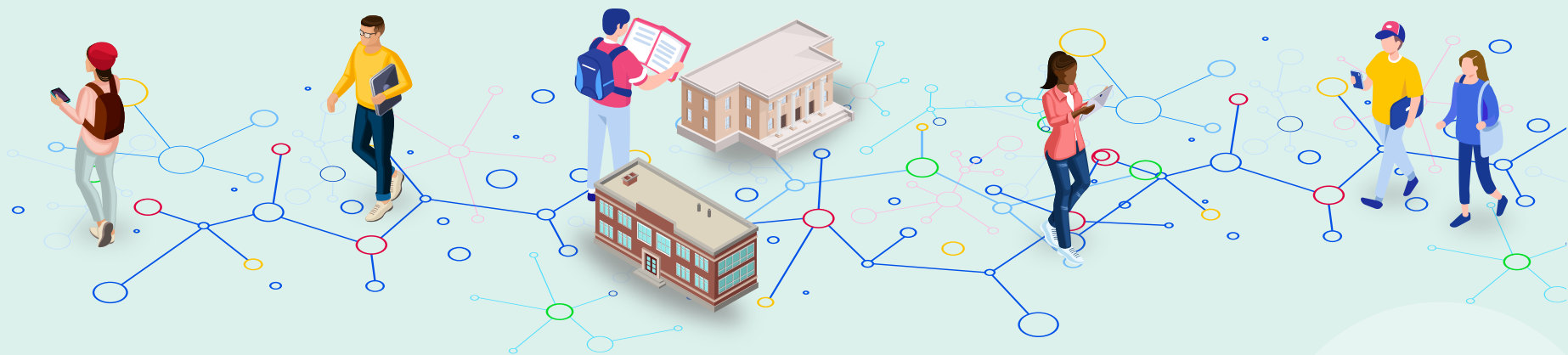
- Search full text by default with no option to modify this behavior

<input checked="" type="checkbox"/>	CUSTOM	Include Matches In Full Text Default	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
<input checked="" type="checkbox"/>	CUSTOM	Include Matches In Full Text Override	OFF	On <input type="radio"/> Off <input checked="" type="radio"/>

## Shorten the Long Tail for Increased Performance and Less Noise



- Default searches don't include full text and the user doesn't have the option to add this field to their search

<input checked="" type="checkbox"/>	CUSTOM	Include Matches In Full Text Default	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
<input type="checkbox"/>	DEFAULT	Include Matches In Full Text Override	OFF	



# Summon 2022 Roadmap

# Planned Release Dates and Preview Environment

- Quarterly Releases—include release notes and preview period
  - February 2                      Preview January 26 
  - May 4                              No Preview (No user facing functionality) 
  - August 3                         Preview July 13
  - November 2                      Preview October 19
- Maintenance Releases
  - First Wednesday of all other months
  - No preview
  - No release notes (unless it includes customer- or patron-facing functionality)

# Summon Roadmap Highlights



2022 H1

- Summon UI Refresh: Improvements on the December 2021 Release
- Ability to exclude subject headings, by institution
- SAML support for Sierra via Summon (SvS) (for Early Adopter Testing)

- Data Quality Improvements
- Ongoing Analytics
- Accessibility



2022 H2

- SAML support for Sierra via Summon (SvS)
- Summon UI Refresh: QuickView/Preview Pane, Advanced Search, My Library Card improvements (SvS), and Results Page Refinements
- Display Coverage Dates for E-journals in Summon Results (NERS)
- Refine Content Type Web Resource to Identify Online Newspaper Articles (NERS)
- Ensure OA link Is Available for Open Access Content (NERS)
- Collection Discovery for Summon over Alma (NERS)
- Custom Citation Styles
- Design and plan for LTI for Summon (NERS)



# User Experience (UI and functions)

## User Experience

Summon UI Refresh: Quick View / Preview Pane

Summon UI Refresh: Advanced Search

Custom Citation Styles

Collection Discovery for Summon over Alma



# Summon UI Refresh: Quick View / Preview Pane

Provide more detailed information on a brief result via a Quick View overlay pane

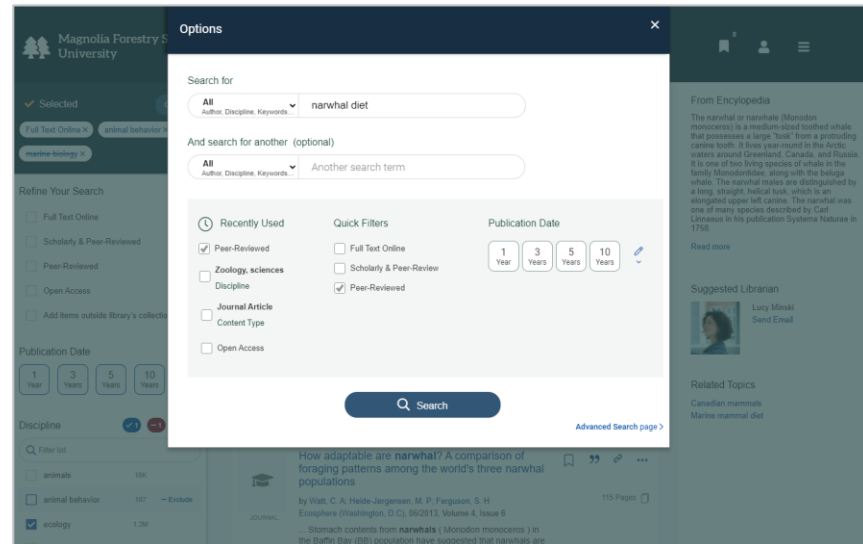
- Provide more information on a specific result without leaving the Search Results Page
- Improved visual and placement based on user feedback and expectations from other sites

The screenshot displays the Summon search interface for Magnolia Forestry Science University. The search term is 'narwhal diet', resulting in 1,292 results. The interface includes a 'Selected' section with filters for 'Full Text Online', 'animal behavior', and 'marine-biology'. A 'Refine Your Search' section offers options for 'Full Text Online', 'Scholarly & Peer-Reviewed', 'Peer-Reviewed', 'Open Access', and 'Add items outside library's collection'. A 'Publication Date' filter is set to '1 Year'. A 'Discipline' filter shows 'animals' (19K), 'animal behavior' (187), and 'ecology' (1.2K). The search results list includes 'The natural history of Canadian mammals' by Donna Naughton, 'Analysis of narwhal tusks reveals ecology and mercury exposure' by Dietz, Rune, Desforges, Jean-Pierre, et al., and 'How adaptable are narwhals? Foraging patterns among the w populations' by Watt, C. A., Heide-Jørgensen, M. P., et al. A 'Quick View' overlay pane is open for the first result, 'The natural history of Canadian mammals', showing its cover, author, format (eBook), availability, and a detailed abstract. The abstract discusses the impact of mammals on their environment and the diversity of Canadian mammals. The 'Quick View' pane also includes a 'Full Details Page' link and a 'Tags' section with categories like 'orca whale captivity', 'orca whale social behavior', 'orca whale hunting', 'wild orca whale', and 'dorsal fin collapse'.

# Summon UI Refresh: Advanced Search

Improve access to Advanced Search features via simplified overlay and refresh Advanced Search Page for usability

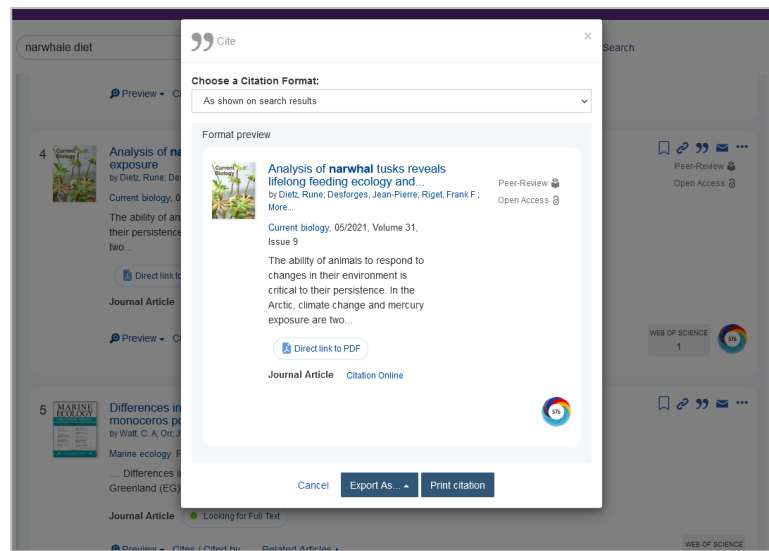
- Create a new Advanced Search overlay so frequently used tools are easily accessible
- Refine Advanced Search page for better usability



# Custom Citation Styles

Ability to create custom citation styles

- Create new citation styles that currently are not available in Summon
- Create styles based on existing ones that match your institution's needs



# Collection Discovery

## Support for Collection Discovery for Summon over Alma

- Allow libraries to manage collections of titles by grouping them in categories for easy browsing
- Available for Summon over Alma sites

The screenshot displays a library website interface. At the top, there is a dark grey header with the word 'COLLECTIONS' in white. Below the header, the text 'All Collections' is visible. A section titled 'Collections (13)' shows a grid of collection cards. Each card features a representative image and a title. The visible cards are: 1. '#FEMINISM' with a black background and pink text, labeled 'Feminist Studies'. 2. 'Art Collection' with a collage of art, including a Van Gogh self-portrait and a book icon. 3. 'Van Gogh Digitized Paintings' with a collage of various Van Gogh paintings. 4. 'Foods of Taiwan as seen by tourists' with a collage of various Taiwanese dishes.



# Open Systems and Integration

## Open Systems and Integration

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Sierra via Summon: SAML Support

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Sierra via Summon: My Library Card  
Improvements

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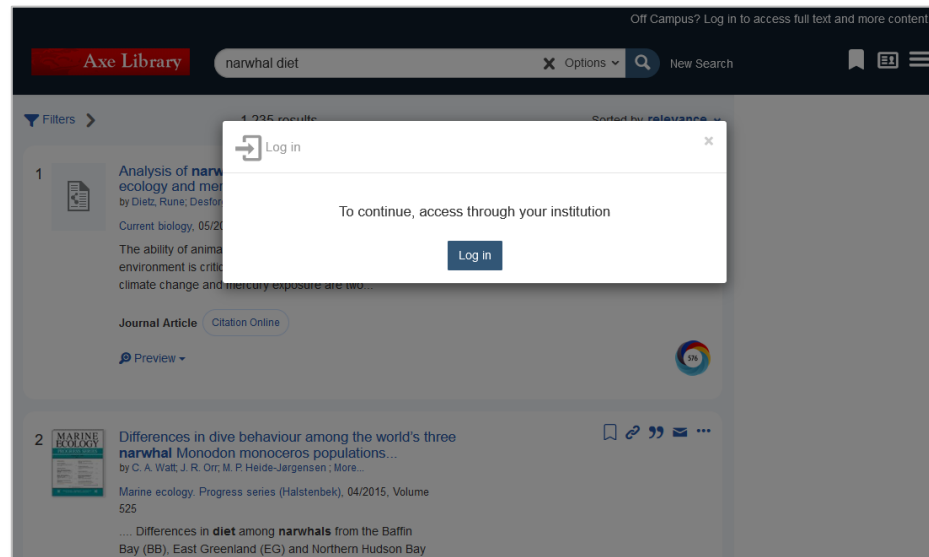
LTI Support for Summon (Design and Plan)

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# Sierra via Summon: SAML Support

Ability to log into Sierra via Summon using SAML authentication

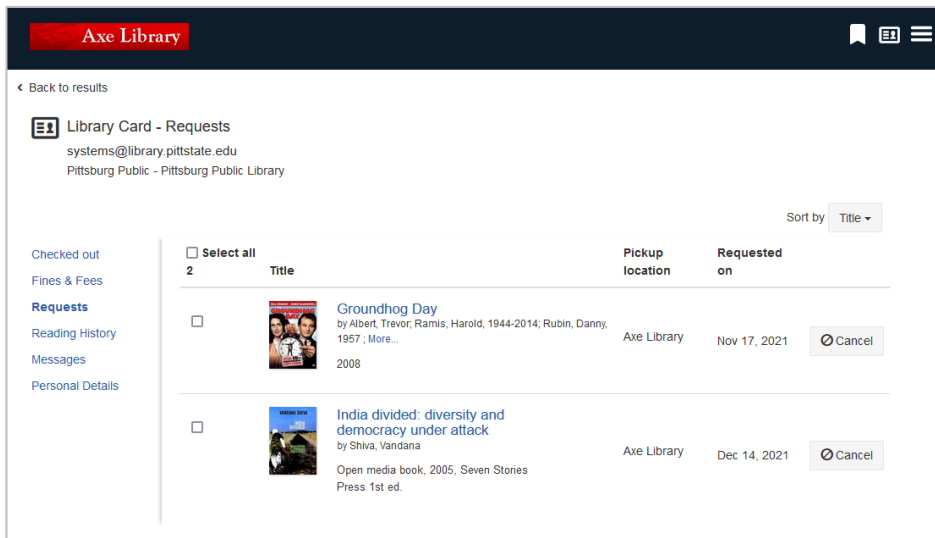
- Add SAML integration to the current Sierra via Summon integration
- Will support both CAS and SAML
- First step in additional improvements for authentication





# Sierra via Summon: My Library Card Improvements

Provide patrons access to a My Library Card page customized for your institution

- Ability to configure elements displayed in My Library Card page
- Additional functionality



The screenshot displays the 'Axe Library' My Library Card page. The header includes the library name 'Axe Library' and navigation icons. Below the header, there is a 'Back to results' link and a 'Library Card - Requests' section with the email 'systems@library.pittstate.edu' and the institution 'Pittsburg Public - Pittsburg Public Library'. A 'Sort by' dropdown menu is set to 'Title'. A table lists two requests:

<input type="checkbox"/>	Select all	Title	Pickup location	Requested on	
<input type="checkbox"/>	2	 <b>Groundhog Day</b> by Albert, Trevor, Ramis, Harold, 1944-2014; Rubin, Danny, 1957 ; More... 2008	Axe Library	Nov 17, 2021	<input type="button" value="Cancel"/>
<input type="checkbox"/>		 <b>India divided: diversity and democracy under attack</b> by Shiva, Vandana Open media book, 2005, Seven Stories Press 1st ed.	Axe Library	Dec 14, 2021	<input type="button" value="Cancel"/>



# LTI Support for Summon

## Design and Plan Implementation of an LTI for Summon

- Ability to integrate Summon into Learning Management Systems (LMS) such as Canvas
- Develop LTI (Learning Tools Interoperability) Support
- Initial design and plan; delivery of functionality dependent on overall requirements generated from plan



# Search and Ranking

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## Search and Ranking

Better Identify Online Newspaper Articles

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# Better Identify Online Newspaper Articles

## Refine Content Type Web Resource to Identify Online Newspaper Articles

- Improve identification of online newspaper content currently identified as Web Resources

Content Type ▾ Sort ▾

🔍 Filter list

<input type="checkbox"/>	Newspaper Article	204K	
<input type="checkbox"/>	Transcript	22K	Exclude this item
<input type="checkbox"/>	Web Resource	11K	<b>X Exclude</b>
<input type="checkbox"/>	Magazine Article	5.4K	
<input type="checkbox"/>	Book / eBook	127	



# Linking to Full Text

## Linking to Full Text

Improve Open Access Linking



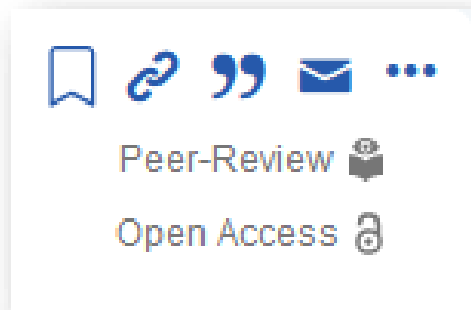
Provide Detailed Journal Coverage Dates



# Open Access Linking

Ensure OA link Is Available for Open Access Content

- Improve linking to Open Access Content
- Link directly from OA icon to available content



# Journal Coverage Dates

## Display Coverage Dates for E-journals in Summon Results

- Show coverage dates with links for title-level e-journal results in the Summon search results



International journal of American linguistics

ISSN: 0020-7071

[Look up Article](#)

[Journal Details](#) ▼



Peer Reviewed

[ProQuest One Academic Eastern Edition](#)

[UMSL Libraries Print Journals \(Update\)](#)

[1900 to Present in Reprints Desk](#)

[07/01/1917 to 01/01/1921 in Open Access Digital Library](#)

[07/01/1993 to 1 year ago in Academic Search Alumni Edition](#)



# Data Quality and Rights

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## Data Quality and Rights

CDI Rights Processing Improvements - Enhanced Performance and Improved Matching

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Ongoing Improvements in the Merged Record

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# Ongoing Improvements

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## Other

Accessibility

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Analytics

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# 360 and Intota Services

Amy Pemble  
Director, Product Management



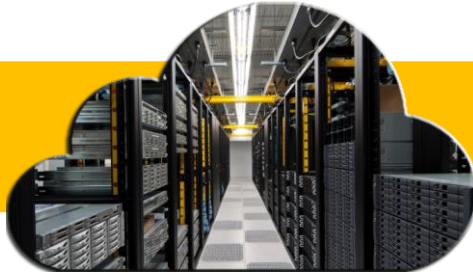
# 360 and Intota Services 2022 Roadmap

Community Requests and

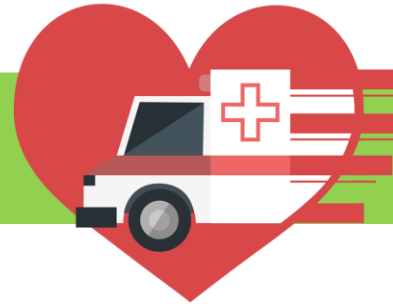
NERS



Infrastructure



Continuous Support



# Planned Release Dates

- Quarterly Releases

- February 23



- June 17

- August 3

- November 2

- Monthly server maintenance window

- 3<sup>rd</sup> Sunday of each month. Sign up at [Ex Libris Status](#) page for alerts

- **June 17** database management software upgrade: all 360, Intota, and Ulrich's services will be unavailable for about 24 hours.



# Community Requests and

NERS



2022 Q1

## EJP: Filter the Autocomplete Suggestions

- Automatically filter search suggestions to resources the library licenses / owns
- Eliminate 0 result searches and user confusion

### Online Journals, Books and more

Search by Title or Identifier (ISSN/ISBN):

All  Journals Only  Books Only  Videos Only

Title begins with

heart disease

If you already have a citation an

Heart disease (Hagerstown, Md.)  
Heart disease weekly

# Community Requests and

NERS



2022 Q2

## View the MARC record availability at the database level

Library Databases

Filter By:

Go To Page:  / 3

Database Name	Custom Database Name	Code	Status	Titles	MARC Coverage	Provider
ABI/INFORM Global		M0C	Subscribed	4308	84%	ProQuest
Acceda Noticias		BSP	Subscribed	94	27%	NewsBank
Access Business News		BAB	Subscribed	296	61%	NewsBank
Access International News		BAI	Subscribed	4855	53%	NewsBank
Access Military, Government News		BMT	Subscribed	32	53%	NewsBank
Access Newswires, Transcripts		BBT	Subscribed	358	15%	NewsBank
Access World News Research Collection		BAW	Subscribed	12810	56%	NewsBank
ACS All Publications		GGK	Subscribed	70	100%	American Chemical Society
ACS DGRWeb Institution Search		ADF	Subscribed	0	0%	American Chemical Society
ACS Publications		ACS	Subscribed	99	99%	American Chemical Society
American Chemical Society Legacy Archives		ACJ	Subscribed	40	100%	American Chemical Society
American Chemical Society Single Title Subscriptions		XKZ	Subscribed	23	91%	American Chemical Society
American Chemical Society Supporting Information		SUP	Subscribed	47	32%	American Chemical Society
American Chemical Society Web Editions - NESLi2		GNL	Subscribed	49	100%	American Chemical Society

# Community Requests and

NERS



2022 Q2

## EJP: Rank main titles ahead of alternate titles



*We'd like to be able to decide how results should show up in the Journals search: a specific example ... would be if you are searching on "nature", then the journals with "nature" in the real title (as opposed to the Alternate Title) would rise to the top.*



# Community Requests and

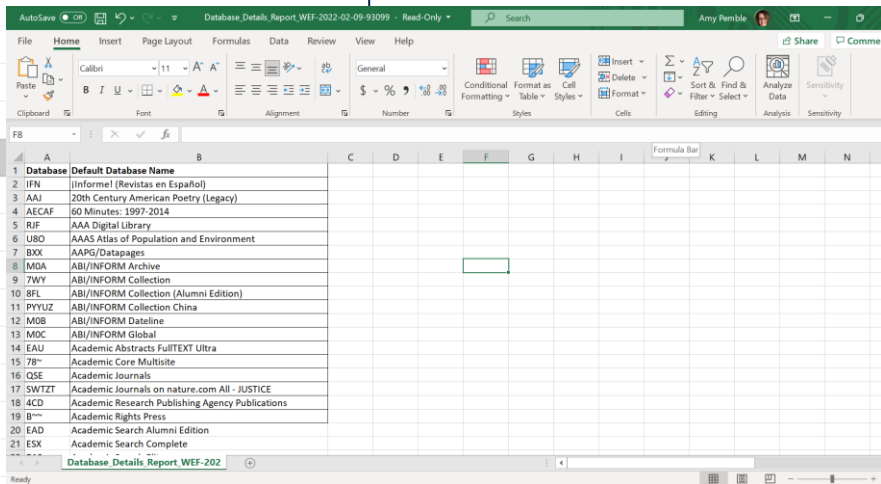
NERs



2022 H2

## 360 Link: Bulk Upload of Database Order list

209	Backfile Package - Psychology (Legacy) [YPT]
210	Sharpe Online Reference
211	Slavery, Abolition and Social Justice, 1490-2007
213	SPIE journals
214	Springer Books
215	Springer Online Journals Complete
216	SpringerLINK - SCELCO Combo
217	SpringerLink Contemporary (1997 - Present)
218	Taylor & Francis Online
219	Thieme Clinical Collections
220	Thieme E-Library
221	Thieme-Connect
222	Thèses.fr
223	UC Press E-Books Collection, 1982-2004 (Public)
224	University of California Press Journals
225	UPCC Books 2013 Complete Collection
218	Wiley-Blackwell Online Books - All Titles (includes Withdrawn titles)





2022 H2

## KBART Automation Recommended Practices

### MY INTOTA

[View All](#)

#### Upcoming Renewals

There are no upcoming resources renewals.

#### License Expirations

There are no upcoming license expirations.

#### Upload Status

- 02/06/2022 [TR\\_J1 | SAGE Publications](#) - Pending
- 02/06/2022 [TR\\_J2 | SAGE Publications](#) - Pending
- 02/05/2022 [TR\\_J1 | University of Chicago Press](#) - Pending

#### Automated Holdings Updates

- 02/09/2022 [Ebook Central Perpetual and DDA](#)



[Home](#) / [Standards Committees](#) / [kbart](#)

### KBART Automation Working Group

Now Available!

The [KBART Automation Recommended Practice \(NISO RP-26-2019\)](#) is now available.

#### Recommended Practice for Enhancing KBART Automated Exchange of Title Lists and Library Holdings (KBART Automation Working Group)

This project, begun in early 2017, will create a NISO Recommended Practice to support individual library holdings of electronic products and to automate the request and retrieval of KBART reports for title lists and library holdings. The [work item approved by NISO Voting Members describing the project](#) is available.

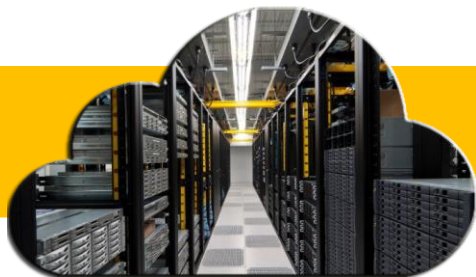
Revised and approved by the NISO Discovery to Delivery Topic Committee, May 23, 2017

#### Section pages

[Knowledge Bases And Related Tools \(KBART\)](#)

- [KBART for Content Providers](#)
- [KBART Endorsement](#)
- [KBART Glossary of relevant terms](#)
- [KBART Additional Resources](#)
- [KBART Automation Working Group](#)
- [KBART Frequently Asked Questions](#)





# Infrastructure



2022 Q2

June 17: Database management software upgrade

June/July: Intota Assessment migration to Oracle Analytics Server platform. No service disruption.

# Continuous Support



**IEDL** refinements  
to increase  
linking accuracy

SUSHI  
harvest  
conflicts

Auto-  
holdings  
title  
conflict

Linker  
syntax  
changes

Show terms  
of use in  
EJP

Improve  
CDI rights  
feed

VPAT  
updates

Add OVID  
databases  
to global  
exclude list



# Questions?

# Thank you!

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