Ex Libris
Part of Clarivate

What's New with Summon & 360/Intota Services

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

2022 ELUNA ANNUAL MEETING ONLINE MAY 2022

Brent D. Cook
Director, Product Management
Summon

Amy Pemble
Director, Product Management
Intota & 360 Services

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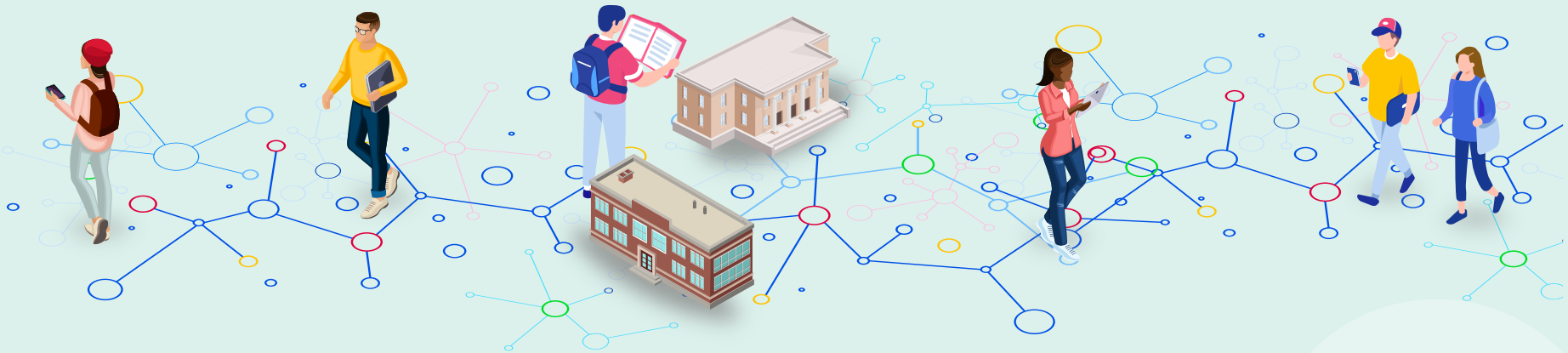
Summon

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



Review Recent Accomplishments

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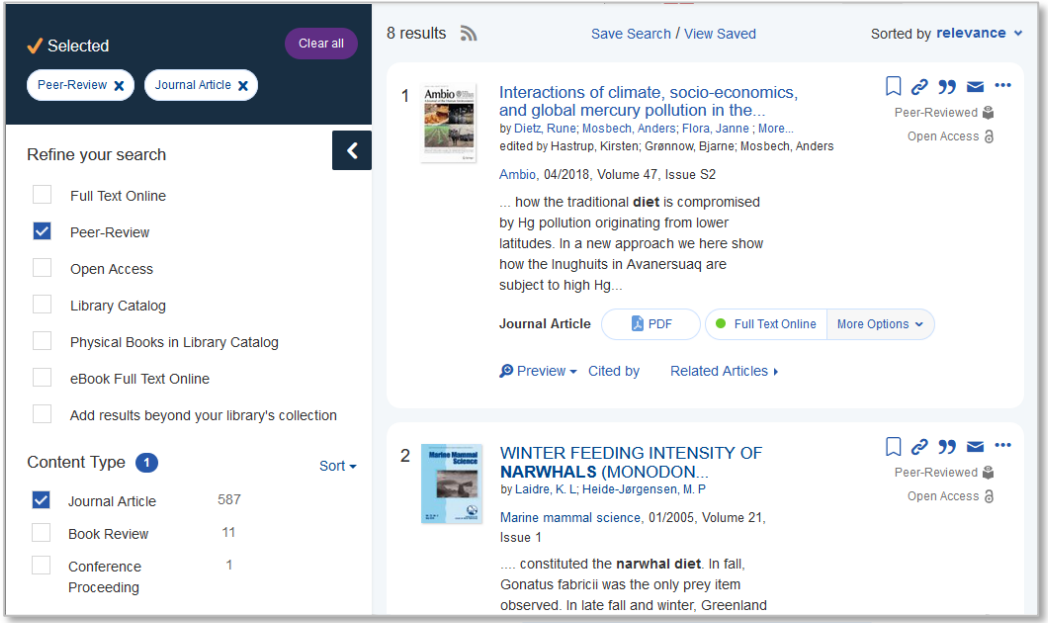
The “New” Summon Experience

A Refreshed User Interface Optimized for Usability

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



2022 H1

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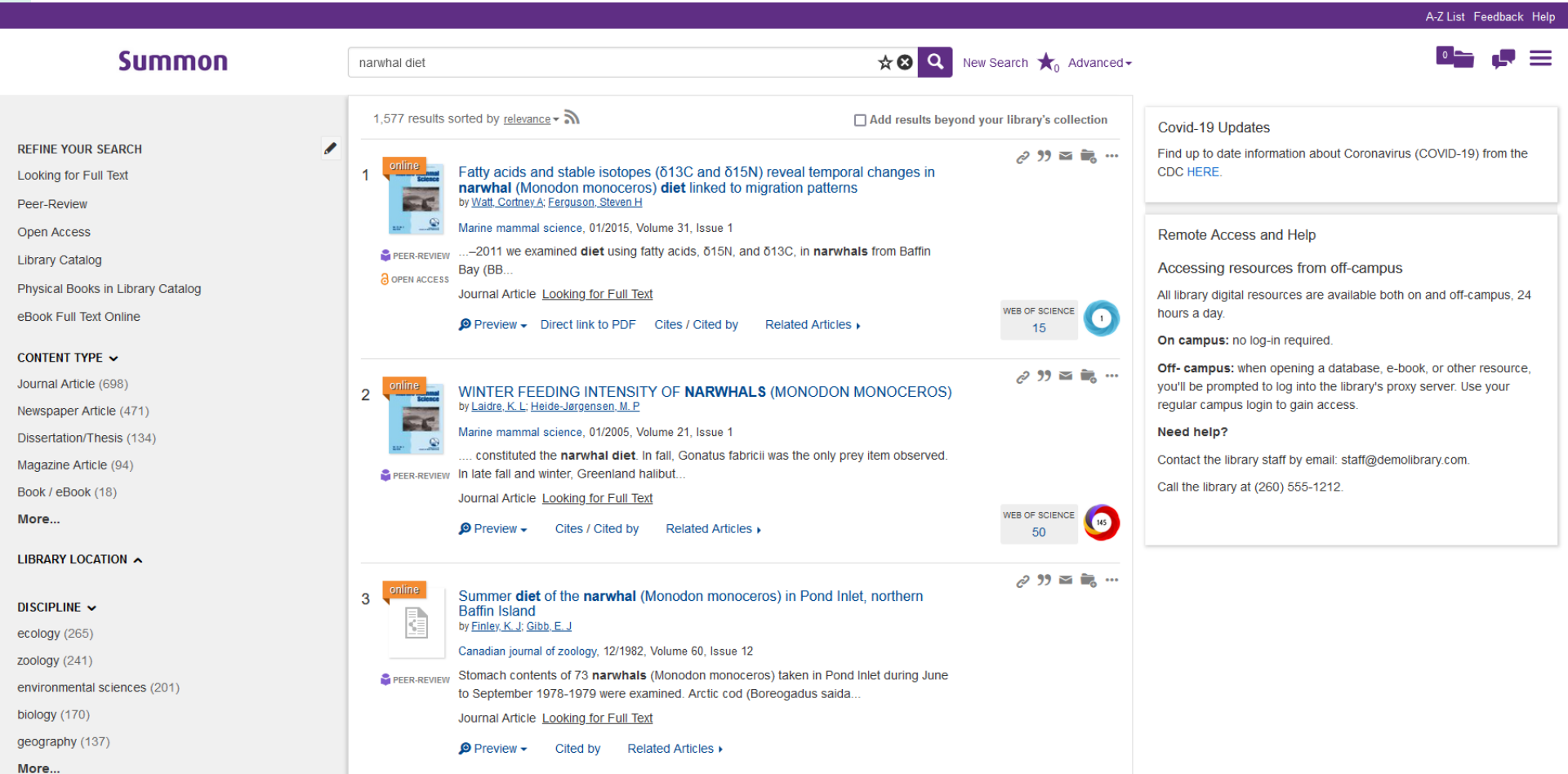
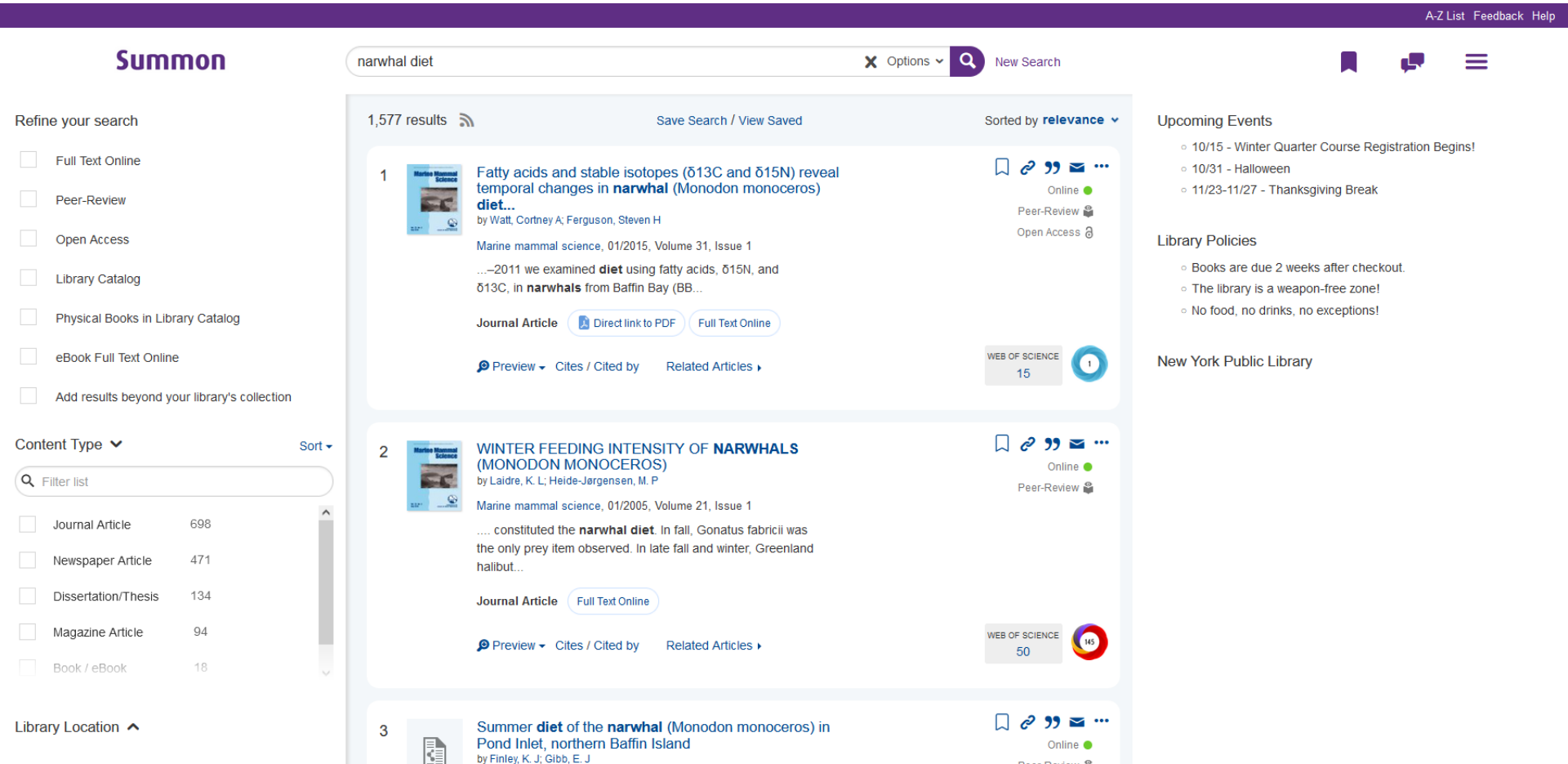
Summon Results Page: Before



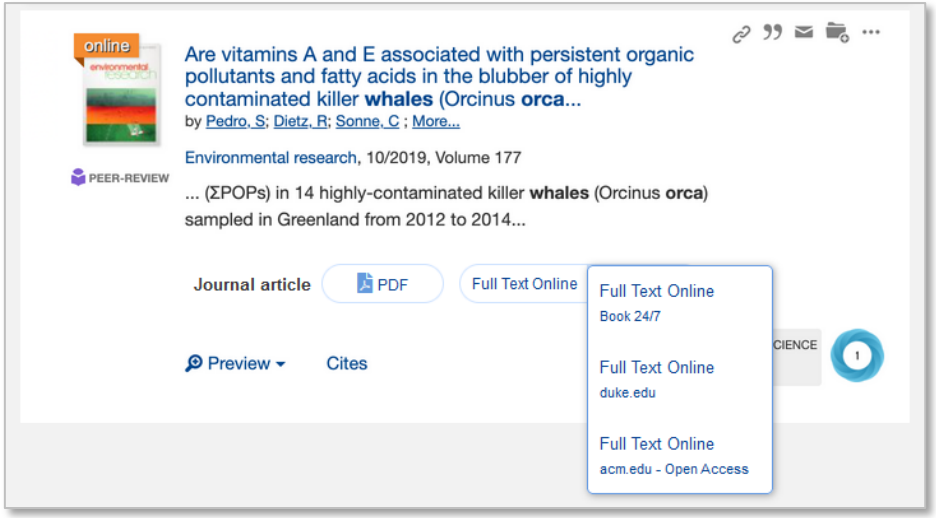
Summon Results Page: After



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



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NERS
2021

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

NERS

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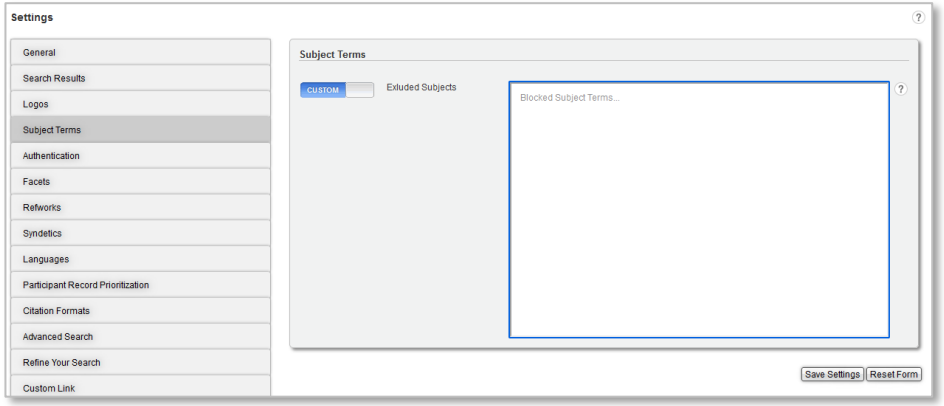
Ability to Block Display of Subject Headings by Institution

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



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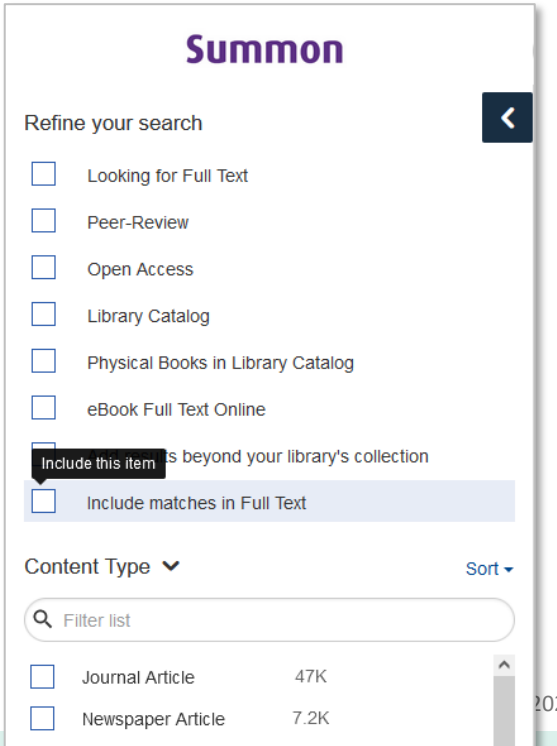
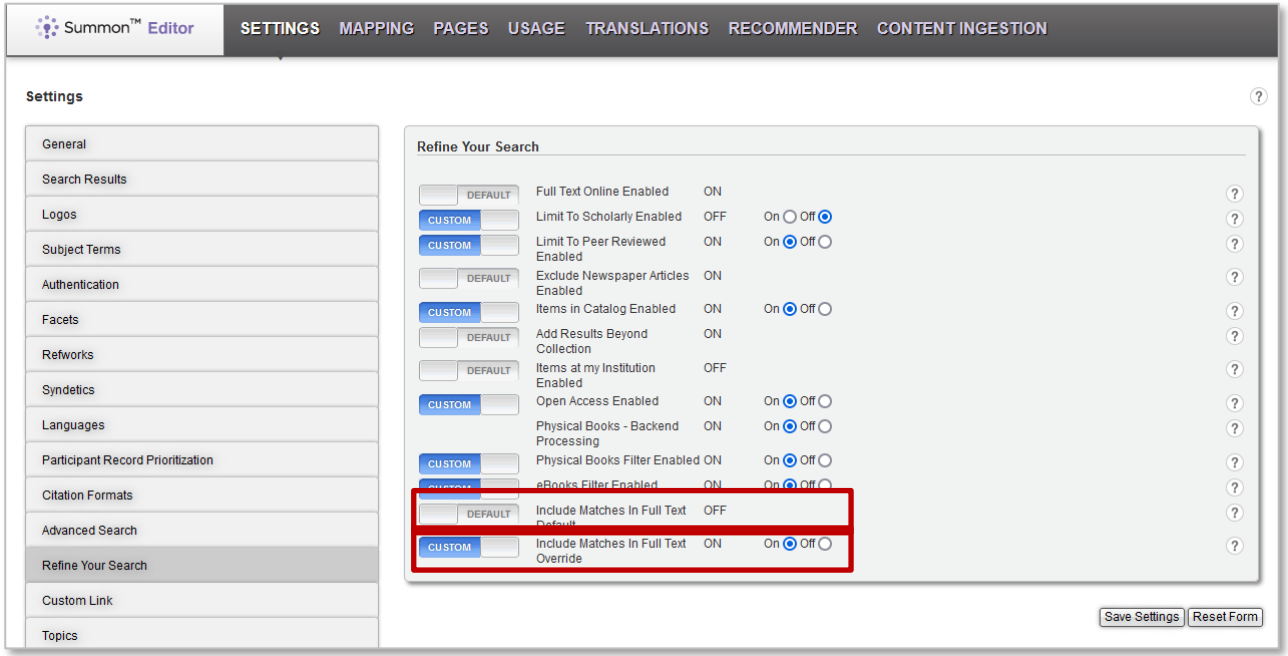
Optional Full Text Searching

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



- 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



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

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Optional Full Text Searching

Best performance and most options

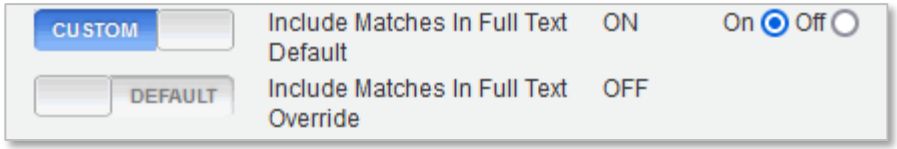
- Shortens the long tail and increases performance for the query; also allows users to add a full text search when they want

Perform like Classic Summon Search

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

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



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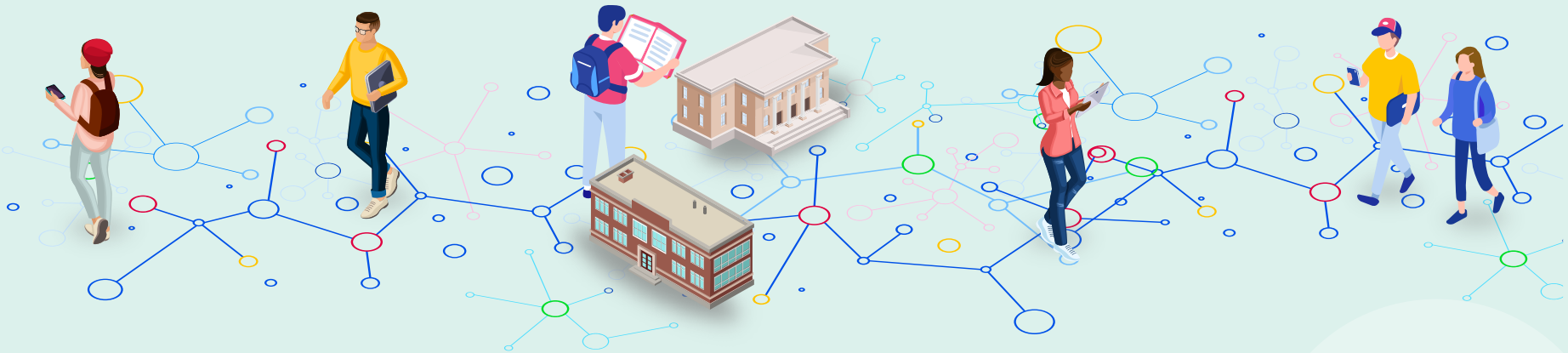

Summon 2022 Roadmap

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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)

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Summon Roadmap Highlights

2022 H1	2022 H2
• 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)	• 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
• Data Quality Improvements • Ongoing Analytics • Accessibility	• 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 NERS

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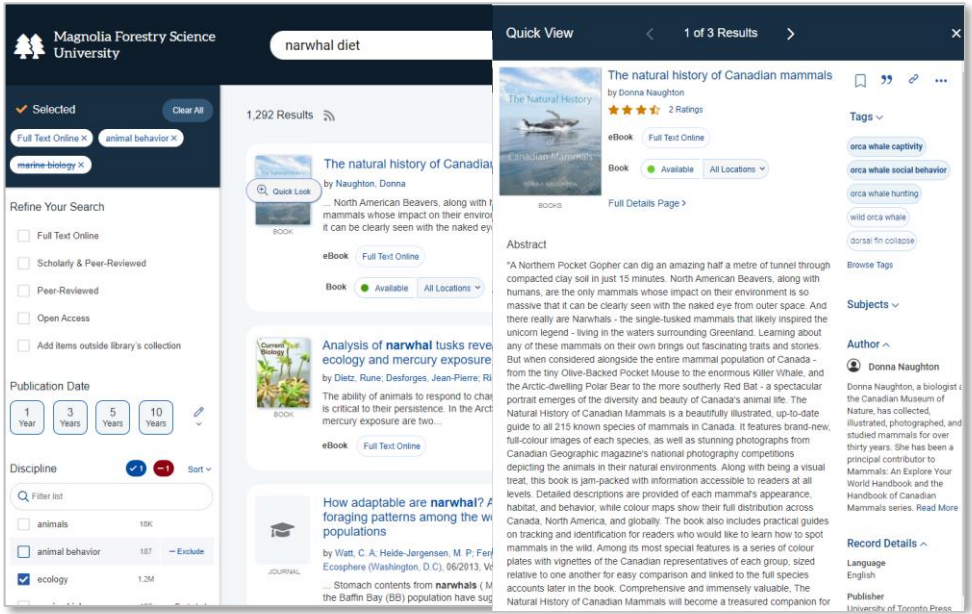
Summon UI Refresh: Quick View / Preview Pane

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



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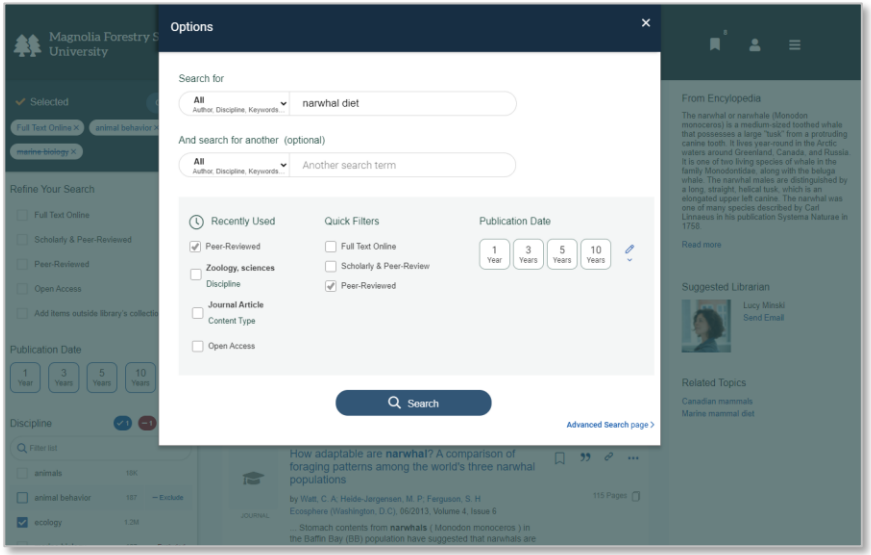
Summon UI Refresh: Advanced Search

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

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



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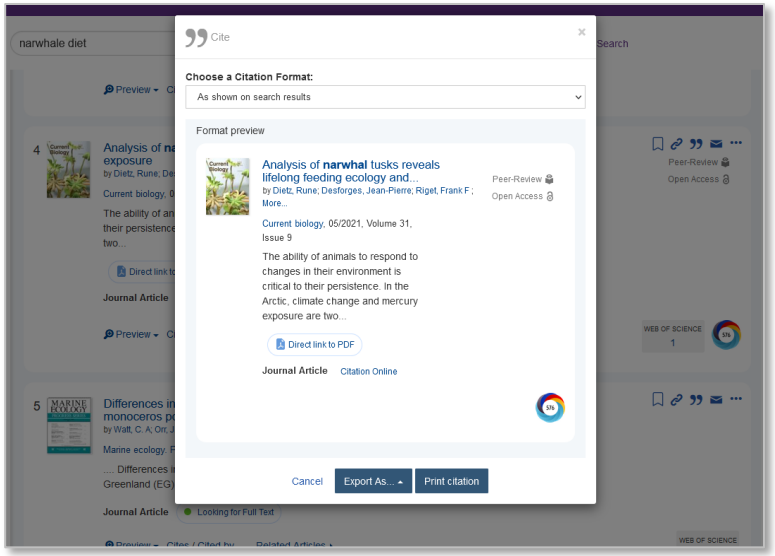
Custom Citation Styles

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



2022 H1

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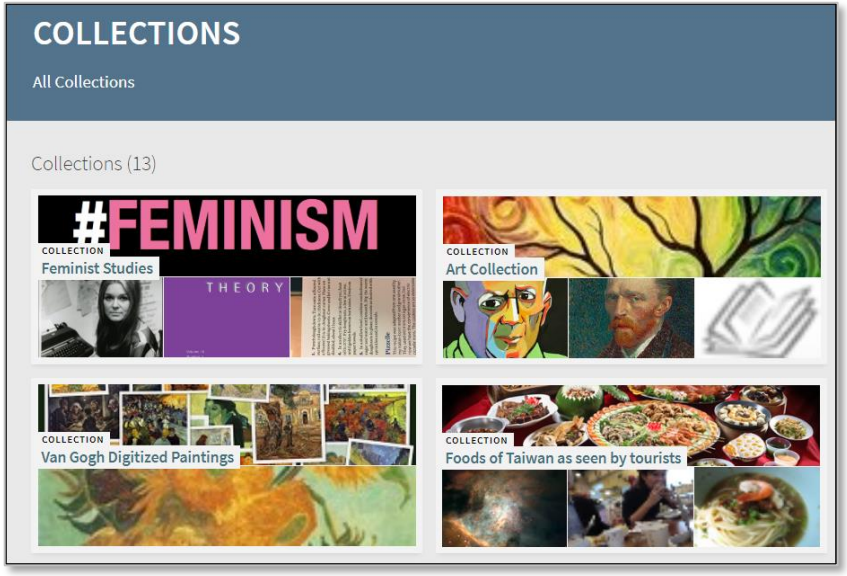
Collection Discovery

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



NERS

2022 H2

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Open Systems and Integration

Open Systems and Integration	Sierra via Summon: SAML Support
	Sierra via Summon: My Library Card Improvements
	LTI Support for Summon (Design and Plan)

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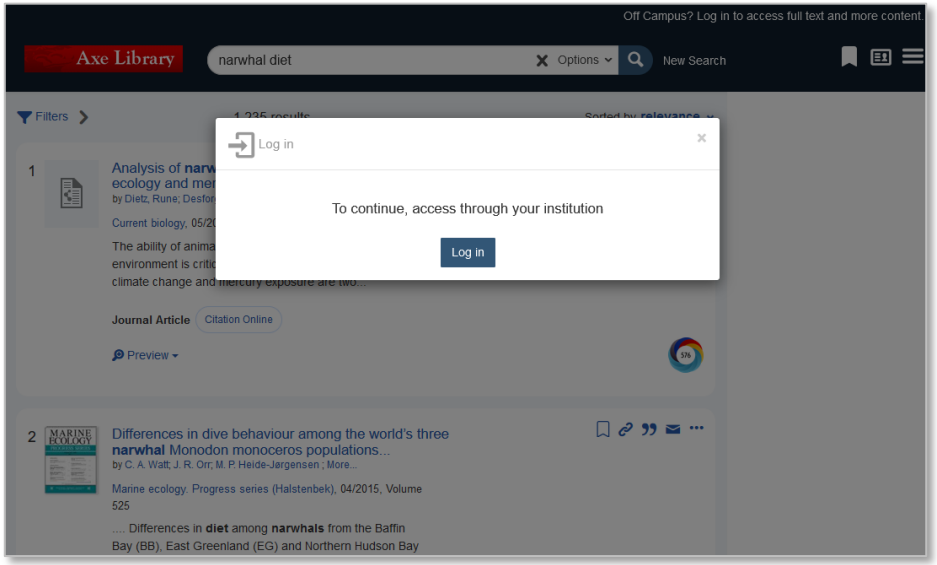
Sierra via Summon: SAML Support

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



2022 H2

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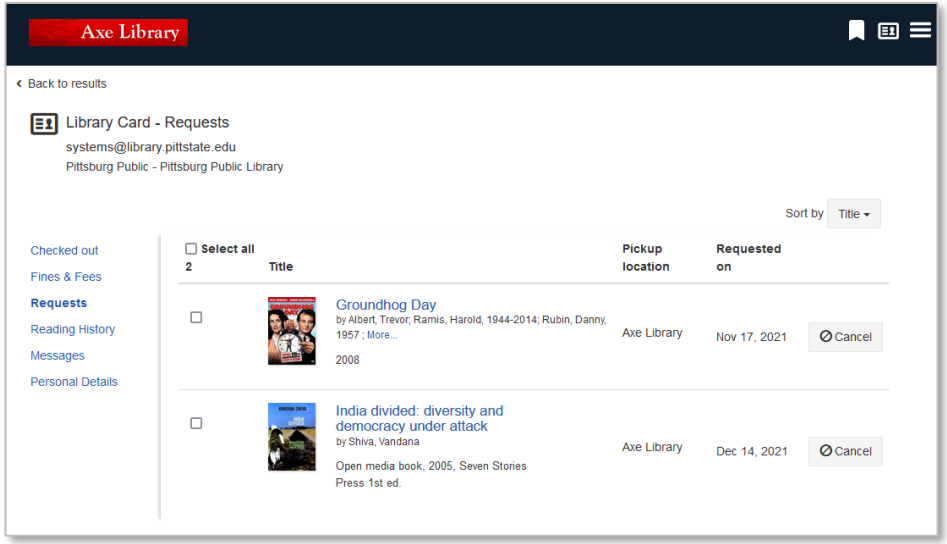
Sierra via Summon: My Library Card Improvements

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



2022 H2

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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

NERS

2022 H2

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Search and Ranking

Search and Ranking

Better Identify Online Newspaper Articles

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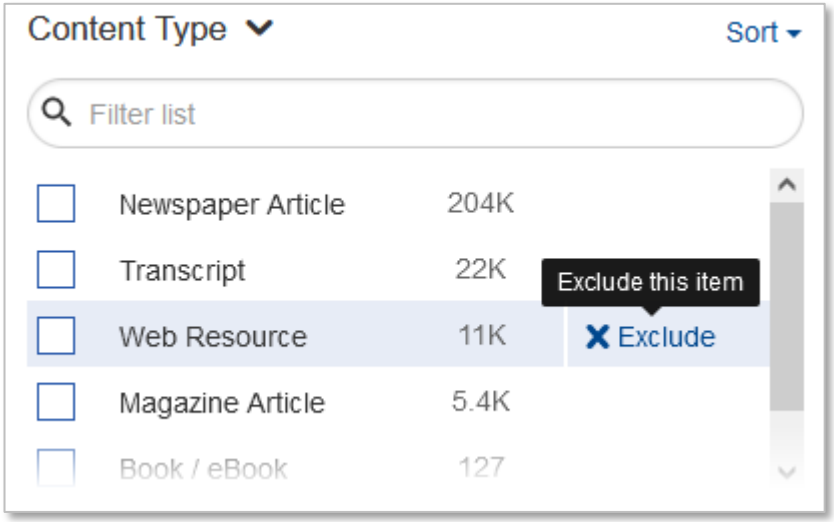
Better Identify Online Newspaper Articles

Refine Content Type Web Resource to Identify Online Newspaper Articles

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



NERS

2022 H2

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Linking to Full Text

Linking to Full Text	Improve Open Access Linking	NERS
	Provide Detailed Journal Coverage Dates	NERS

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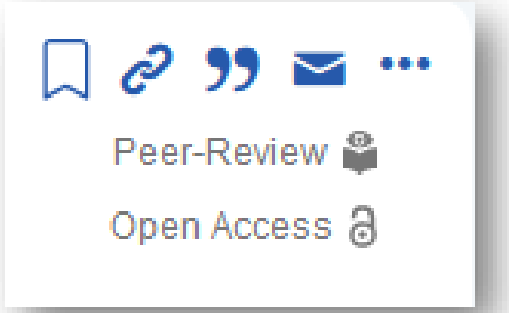
Open Access Linking

Ensure OA link Is Available for Open Access Content

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



NERS

2022 H2

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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

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Data Quality and Rights

Data Quality and Rights	CDI Rights Processing Improvements - Enhanced Performance and Improved Matching
	Ongoing Improvements in the Merged Record

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Ongoing Improvements

Other	Accessibility
	Analytics

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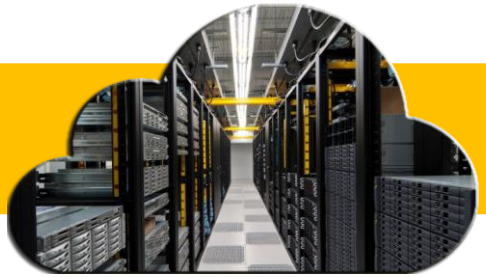
360 and Intota Services

Amy Pemble
Director, Product Management

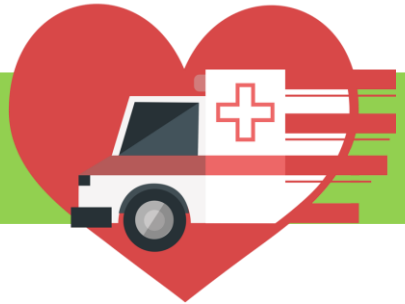
2022 ELUNA ANNUAL MEETING ONLINE MAY 2022

360 and Intota Services 2022 Roadmap

Community Requests and NERS



Infrastructure



Continuous Support

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Planned Release Dates

- Quarterly Releases
  - February 23
  - June 17
  - August 3
  - November 2

- Monthly server maintenance window
  - 3rd 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.

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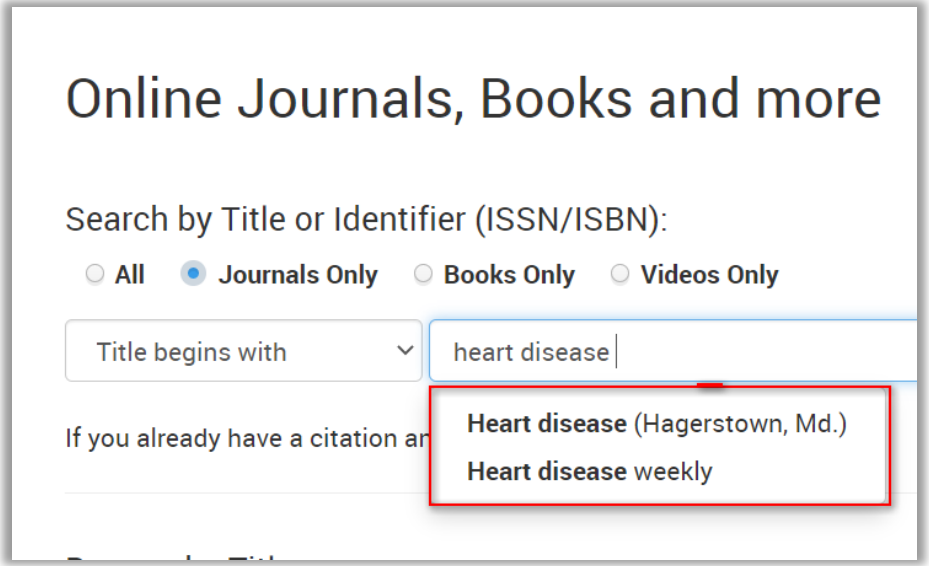
Community Requests and NERS

2022 Q1

EJP: Filter the Autocomplete Suggestions

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



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Community Requests and NERS

2022 Q2

View the MARC record availability at the database level

Library Databases

Filter By: Name Begins With | Apply

Go To Page: 1 / 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

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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.

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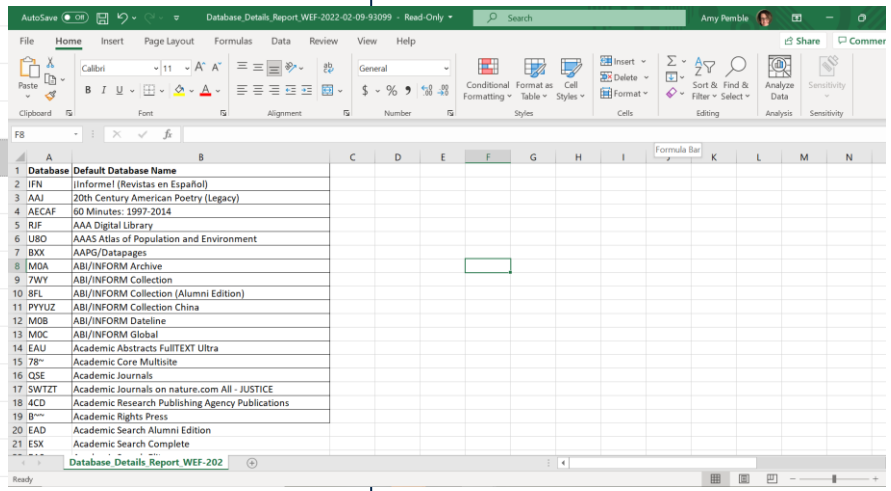
Community Requests and NERS

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 - SCELC 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)



Database_Details_Report_WEF-2022-02-09-93099 - Read-Only

Database	Default Database Name
IFN	iInformel (Revistas en Español)
AAJ	20th Century American Poetry (Legacy)
AECAF	60 Minutes: 1997-2014
RJF	AAA Digital Library
U8O	AAAS Atlas of Population and Environment
BXX	AAPG/Datapages
M0A	ABI/INFORM Archive
7WY	ABI/INFORM Collection
8FL	ABI/INFORM Collection (Alumni Edition)
PYYUZ	ABI/INFORM Collection China
M0B	ABI/INFORM Dateline
M0C	ABI/INFORM Global
EAU	Academic Abstracts FullTEXT Ultra
78**	Academic Core Multisite
QSE	Academic Journals
SWTZT	Academic Journals on nature.com All - JUSTICE
4CD	Academic Research Publishing Agency Publications
B***	Academic Rights Press
EAD	Academic Search Alumni Edition
ESX	Academic Search Complete

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Community Requests and NERS

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 - Penc

02/06/2022 TR_J2 | SAGE Publications - Pendin

02/05/2022 TR_J1 | University of Chicago Press - Pe

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.

ommended Practice for Enhancing KBART
Automated Exchange of Title Lists and
ary Holdings (KBART Automation
rking 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.

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

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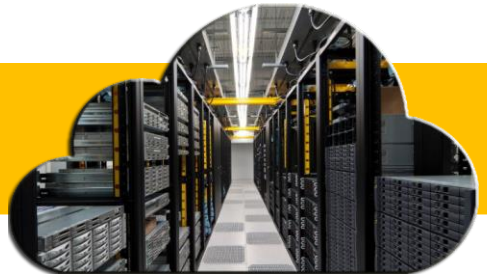

Infrastructure

2022 Q2

June 17: Database management software upgrade

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

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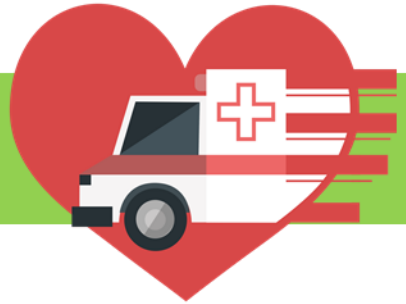

IEDL refinements to increase linking accuracy

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

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Questions?

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Thank you!

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2022 ELUNA ANNUAL MEETING ONLINE MAY 2022

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