



Summon & 360/Intota Services Update

Agenda



Summon

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






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Director, Product Management
Summon



Review Recent Accomplishments

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)
- Accessibility

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. The search term is 'narwhal diet', resulting in 1,292 results. The left sidebar shows filters for 'Selected' (Full Text Online, animal behavior, marine-biology), 'Refine Your Search' (Full Text Online, Scholarly & Peer-Reviewed, Peer-Reviewed, Open Access, Add items outside library's collection), 'Publication Date' (1 Year, 3 Years, 5 Years, 10 Years), and 'Discipline' (animals: 19K, animal behavior: 187, ecology: 1.2M). The main results list includes 'The natural history of Canadian mammals' by Donna Naughton, 'Analysis of narwhal tusks reveals ecology and mercury exposure', and 'How adaptable are narwhals? Foraging patterns among the w populations'. A 'Quick View' overlay pane is open for the first result, showing the book cover, title, author, ratings, and a detailed abstract. The abstract discusses the impact of mammals on their environment, specifically mentioning the Arctic pocket gopher and the Arctic-dwelling polar bear. The Quick View pane also includes tags like 'orca whale captivity', 'orca whale social behavior', and 'orca whale hunting', and a 'Record Details' section with language and publisher information.



Summon UI Refresh: Small Screen Layout

Improve access to facets and custom panels in tablet and mobile view

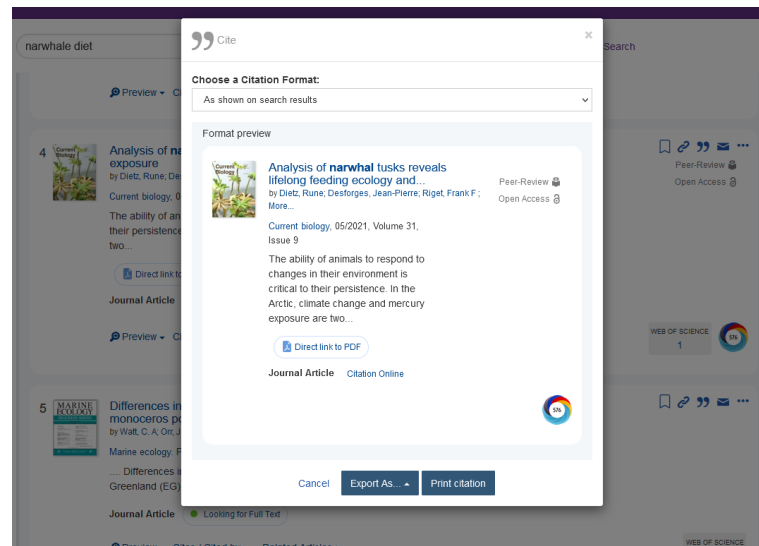
- Improve access and readability for facets and custom panels on smaller screens

The screenshot displays the Summon interface on a tablet. At the top, there is a dark navigation bar with the University of Cincinnati Libraries logo on the left, a search bar containing 'Literature Review', and a 'New Search' button on the right. Below the navigation bar, the main content area is divided into several sections. On the left, there is a 'Refine your search' section with a list of checkboxes for various filters: 'Looking for Full Text', 'Peer-Review', 'Open Access', 'Library Catalog', 'Physical Books in Library Catalog', 'eBook Full Text Online', 'Add results beyond your library's collection', and 'Include matches in Full Text'. Below this is a 'Content Type' dropdown menu and a 'Sort' dropdown menu. In the center, there is a search results list with a '70 results' indicator and a 'Content Type Filter' input field. On the right, there are several custom panels: 'Covid-19 Updates' with a link to CDC information, 'Remote Access and Help' with information about off-campus access, and 'Need help?'.

Custom Citation Styles

Ability to create custom citation styles

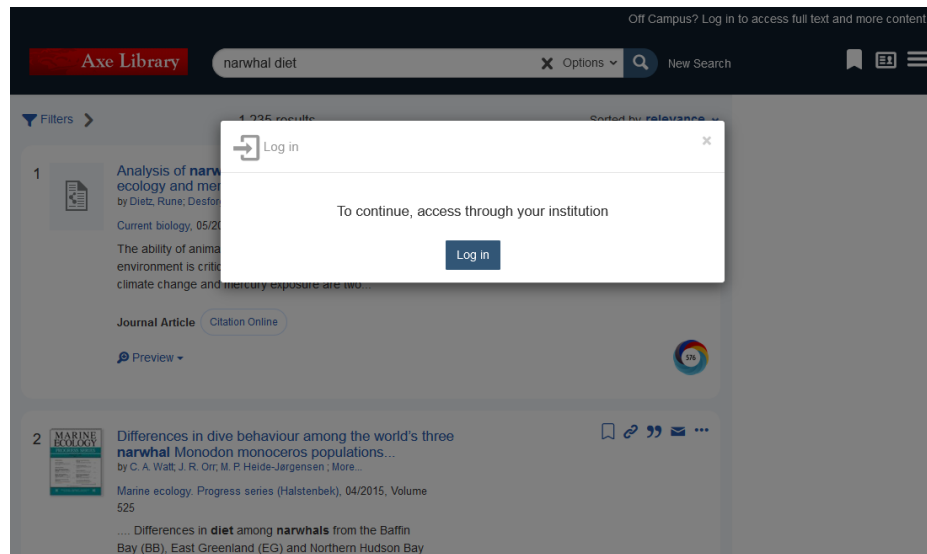
- Create new citation styles that currently are not available in Summon
- Create styles based on existing ones that match your institution's needs



Sierra via Summon: SAML Support

Ability to log into Sierra via Summon using SAML authentication

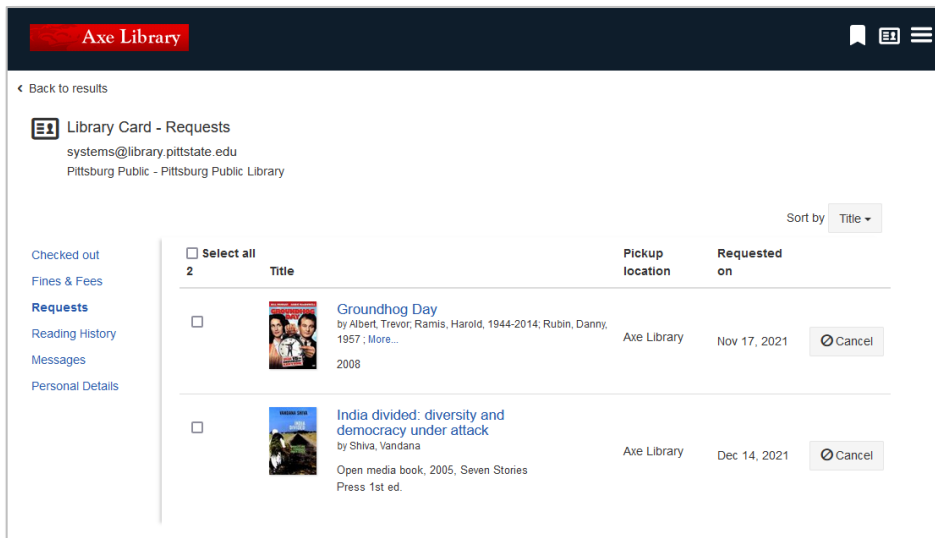
- Add SAML integration to the current Sierra via Summon integration
- Will support both CAS and SAML
- First step in additional improvements for authentication





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' interface for 'Library Card - Requests'. The page includes a navigation menu on the left with options like 'Checked out', 'Fines & Fees', 'Requests', 'Reading History', 'Messages', and 'Personal Details'. The main content area shows a table of requests with columns for 'Select all', 'Title', 'Pickup location', and 'Requested on'. Two requests are listed: 'Groundhog Day' and 'India divided: diversity and democracy under attack'. Each request has a 'Cancel' button.

<input type="checkbox"/>	Select all	Title	Pickup location	Requested on	
<input type="checkbox"/>	2	 Groundhog Day 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"/>		 India divided: diversity and democracy under attack by Shiva, Vandana Open media book, 2005, Seven Stories Press 1st ed.	Axe Library	Dec 14, 2021	<input type="button" value="Cancel"/>

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	X Exclude
<input type="checkbox"/>	Magazine Article	5.4K	
<input type="checkbox"/>	Book / eBook	127	



Better Identify Online Newspaper Articles

Refine Content Type Web Resource to Identify Online Newspaper Articles

Records currently classified as "Web Resource" with one of these titles will be reclassified as "Newspaper Article"

- The Washington Post (Online)
- The Baltimore Sun (Online)
- New York Times (Online)
- Los Angeles Times (Online)
- USA Today (Online)
- Tampa Bay Times (Online)
- Rockland County Times
- Kenora Daily Miner and News (Online)
- The Chatham Daily News (Online)
- The Huffington Post (Blogs on Demand)
- The Business Insider (Blogs on Demand)
- Washington Post – Blogs
- News (Westport, N.Z.)
- The Economic Times e-paper
- Hartford Courant (Online)
- Chicago tribune (1963)
- The Times of India (1861-current)
- The Toronto Star (Online)
- Buffalo News
- The Atlanta Journal - Constitution (Online)



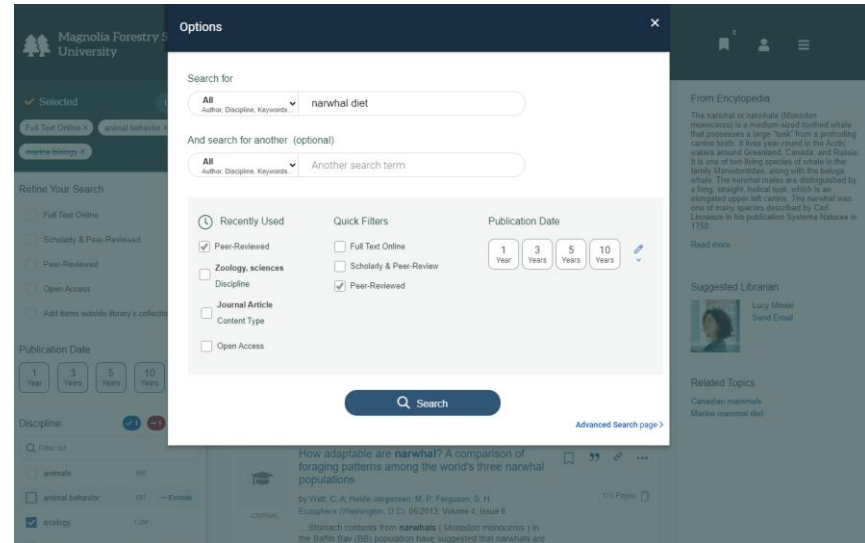


November Release

Summon UI Refresh: Advanced Search

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

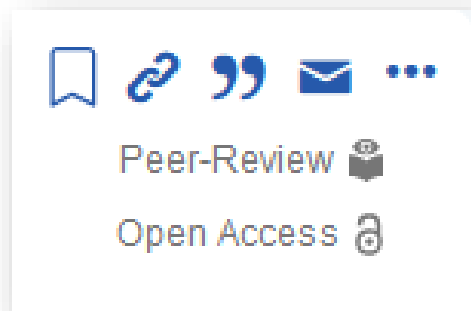
- Create a new Advanced Search overlay so frequently used tools are easily accessible
- Refine Advanced Search page for better usability



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](#)

NERs



2022 H2

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 user interface for managing digital collections. At the top, the word "COLLECTIONS" is prominently displayed in white on a dark blue background. Below this, the text "All Collections" is visible. A section titled "Collections (13)" lists several categories, each with a representative image and a "COLLECTION" label:

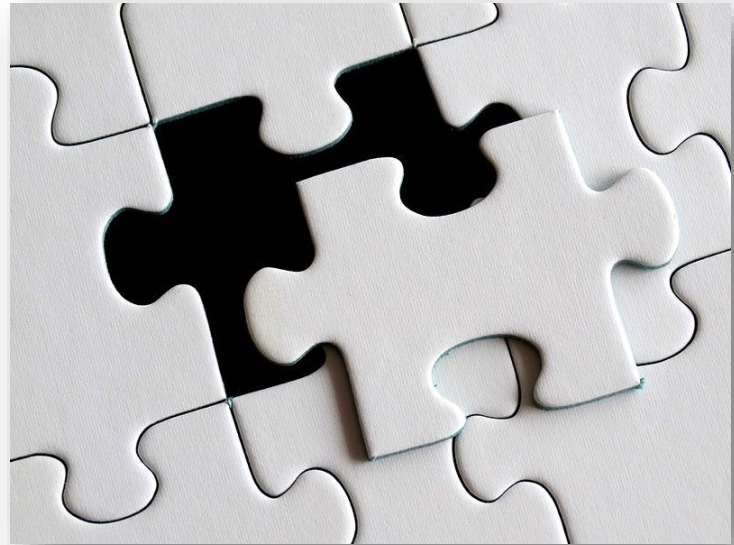
- #FEMINISM**: Features a large pink hashtag and the text "Feminist Studies".
- Art Collection**: Includes a collage of art, such as a Van Gogh self-portrait and a classical painting.
- Van Gogh Digitized Paintings**: Shows a grid of various Van Gogh paintings.
- Foods of Taiwan as seen by tourists**: Displays a variety of Taiwanese dishes.



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





Other Initiatives

Data Excellence (DX)

Addressing the intersection between **Content**, **Technology** and **Users** as part of a data-driven cross-company strategy



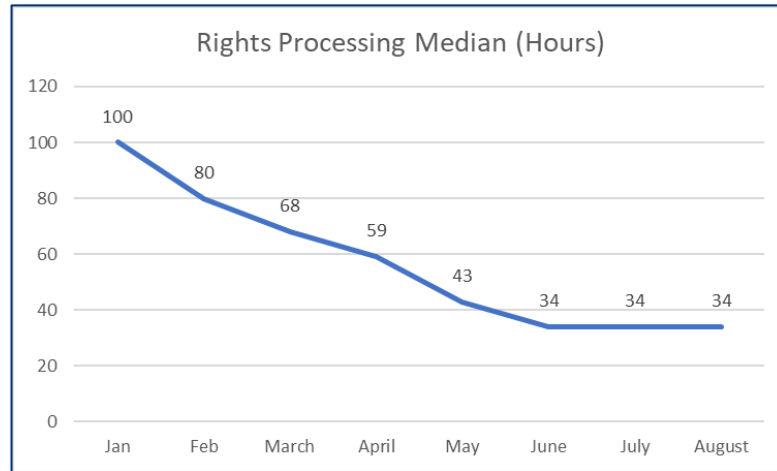
Capacity,
Efficiency, Speed
and Provision,
Quality



Enhancing Rights in CDI



- Major **rights processing** improvements
 - Goal to reduce processing time to 24-48 hours
 - Decreased turnaround from 48-72 hours to below 35 hours
 - Additional improvements in progress throughout 2022



Quicker access and fewer clicks with direct linking to HTML/PDF pages

- 20 providers already supported, with over 10,000 collections and 1.5 billion records
- Additional providers planned throughout 2022 and 2023

https://knowledge.exlibrisgroup.com/Summon/Product_Documentation/Searching_in_The_Summon_Service/Search_Results/Summon%3A_Quicklinks_Provider_List

Provider	Content	Type of Quicklink (PDF/HTML)
ACM	All	PDF
Elsevier ScienceDirect	All	HTML
ProQuest	All Content excluding eBooks on the ProQuest Platform. https://www.proquest.com	HTML (in most cases a link to download the PDF full text is included with the article)
Sage	Journals under https://journals.sagepub.com	PDF, HTML
Springer	Journals and Books under https://link.springer.com	PDF, HTML
Wiley	Journals and Books under https://onlinelibrary.wiley.com	PDF, HTML
Bloome	Journals Content under https://bloome.org	PDF
IOP Publishing	All	PDF
National Library of Medicine	Content which is part of Pub-Med Central collection under https://www.ncbi.nlm.nih.gov	PDF, HTML
New England Journal of Medicine	Content under https://www.nejm.org	PDF, HTML
Emerald	Journals and Books under https://www.emerald.com/	PDF, HTML
Credo Reference	Content under https://search.credoreference.com/	HTML
Thieme	All Journal content besides conference proceedings under https://www.thieme-connect.de/products/journals	PDF, HTML
IEEE	Content under https://ieeexplore.ieee.org	HTML
Mary Ann Liebert, Inc.	Journals under https://www.liebertpub.com/	PDF, HTML
SPIE	Content under https://www.spiedigitallibrary.org/	PDF, HTML
Chicago University Press	Content under https://press.uchicago.edu/index.html	PDF, HTML
Royal Society Publications	Content under https://royalsocietypublishing.org	PDF, HTML
Project MUSE	Journals and Books under https://muse.jhu.edu/	Journals (PDF, HTML) Books (HTML)
Jstor	Only Journal Article under https://www.jstor.org/	PDF, HTML



Community Engagement

NERS Voting Soon

- Add your ideas to the Idea Exchange
 - Both 360 and Summon ideas can be added
- Ideas will be used for 2022 NERS voting



Upcoming Webinars

- Quarterly What's New with Summon and Intota/360



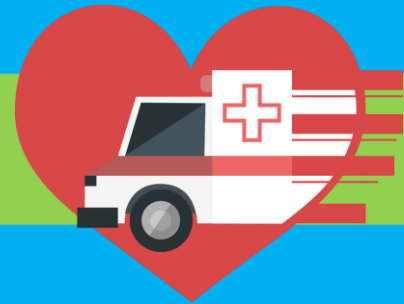
360 and Intota Services

360 and Intota Services 2022 Roadmap



Infrastructure

Continuous Support



Quarterly Release Dates

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



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



2022 in Review

Community Requests and

NERS



2022 Q2

View the MARC record availability at the database level

Library Databases						
Filter By: <input type="text" value="Name Begins With"/> <input type="button" value="Apply"/>						
Go To Page: <input type="text" value="1"/> / <input type="text" value="3"/> <input type="button" value="Next"/> <input type="button" value="Previous"/>						
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

Configure E-Journal Portal 2.0

-  EJP 2.0 Activation and Configuration
-  Branding Options
-  Search Page Options
-  **Results Page Options**
-  Mobile Settings

Results Page Options

Any changes to Results Page Options will take effect after the [daily profile data refresh](#).

Results Navigation and Style

Results on a Page: ▾

Sort Search Results by Main Title:

Community Requests and

NERS



2022 Q2

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)

The screenshot shows an Excel spreadsheet with the following data in column A:

Database	Default Database Name
1	IFN Informel (Revistas en Español)
2	AAJ 20th Century American Poetry (Legacy)
3	AECAP 60 Minutes: 1997-2014
4	RJF AAA Digital Library
5	URO AAAS Atlas of Population and Environment
6	BBX AAPG/Datapages
7	MDA ABI/INFORM Archive
8	7WV ABI/INFORM Collection
9	SFL ABI/INFORM Collection (Alumni Edition)
10	PPYUZ ABI/INFORM Collection China
11	MOB ABI/INFORM Dateline
12	MOC ABI/INFORM Global
13	EAU Academic Abstracts FullTEXT Ultra
14	78- Academic Core Multisite
15	QSE Academic Journals
16	SWTZ Academic Journals on nature.com All - JUSTICE
17	ACD Academic Research Publishing Agency Publications
18	B- Academic Rights Press
19	EAD Academic Search Alumni Edition
20	ESX Academic Search Complete



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 22, 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](#)

Community Requests and

NERS



2022 Q3

KBART Phase 1: Ability to Manually KBART Upload Files

Home > Data Management > Upload Title List

Springer Nature :: Springer Journals Carolina Consortium

Cancel Upload

Database Code: UO3IU

Is KBART File:

File To Upload: No file chosen

Springer Nature :: Springer Journals Carolina Consortium

Database Details

General

Titles (5 of 2271)

Books (0)

Journals (0)

Videos (0)

[View Upload Status](#)

File Name springernature_8200697977_Available_Journals_2022-07-05.txt

Time File Uploaded 7/15/2022 9:19:03 AM

Uploaded By amy.pemble@serialssolutions.com

Upload Status Complete with some row-level errors

Show Errors [Show Errors](#)

Report Status [Unmatched Titles](#)



Infrastructure



2022 Q2

June 17: Database management software upgrade completed

Intota Assessment migration to Oracle Analytics Server platform. No service disruption. *TBD*

Migration to new MFT platform begins November 1. FAQ available here:
<https://bit.ly/3pTz9b7>

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



Coming in November Release

Planned November Highlights

- Continued KBART development
 - Adjustments to new upload capabilities
 - Add KBART import to Intota
 - Add KBART import support for LSH databases
 - Plan infrastructure for automating holdings exchange
- Update the EJP “Title Contains all Words” for CJK languages
- Consortium Support refinements
 - Show proxied links in Intota
 - Allow member libraries to add custom linking parameters (e.g. EBSCO)
- Increase number of downloadable results in Ulrichsweb
- ... and more!



Thank you!

Brent.Cook@Clarivate.com

