What's New with Summon & 360/Intota Services

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Summon

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- Summon
  - Recent Accomplishments
  - Roadmap for Second Half of 2023
- Highlights for CDI Development in 2023
- 360 and Intota Services
  - Roadmap for Second Half of 2023
- Upcoming Webinars and Community Involvement
- Questions?

Summon Overview

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Planned Release Dates and Preview Environment

- Quarterly Releases—include release notes and preview period
  - February 1 Preview January 18
  - May 3 Preview April 19
  - August 2 Preview July 19
  - November 1 Preview October 18

- 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

2023 H1	2023 H2
• Advanced Search: Improve Search Box Layout • Advanced Search: Updated Look and Feel Controls • SAML for Saved Searches • LTI Support for Summon • Google Analytics 4 Support • Mandatory sender e-mail field in Summon (NERS)	• Scopes for Summon Searches • Course Reserves for Sierra via Summon • Improve the Quick Look Pane Layout (NERS) • Display 5xx Fields in Quick Look (NERS) • “Include matches in Full Text” to Search Suggestions (NERS) • Ability to Customize Order of Elements in the Right Pane (NERS) • Ability to match language settings of Summon with 360 Link (NERS) • Prevent eBook and Computer File records from Merging (NERS)

- Data Quality Improvements
- Ongoing Analytics
- Accessibility

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Summon Recent Accomplishments

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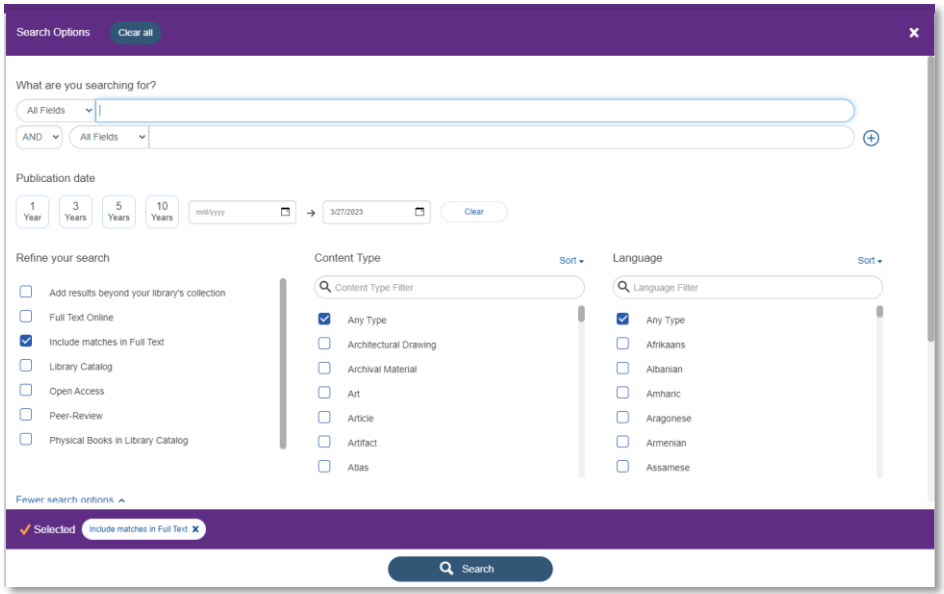
Summon UI Refresh: Advanced Search

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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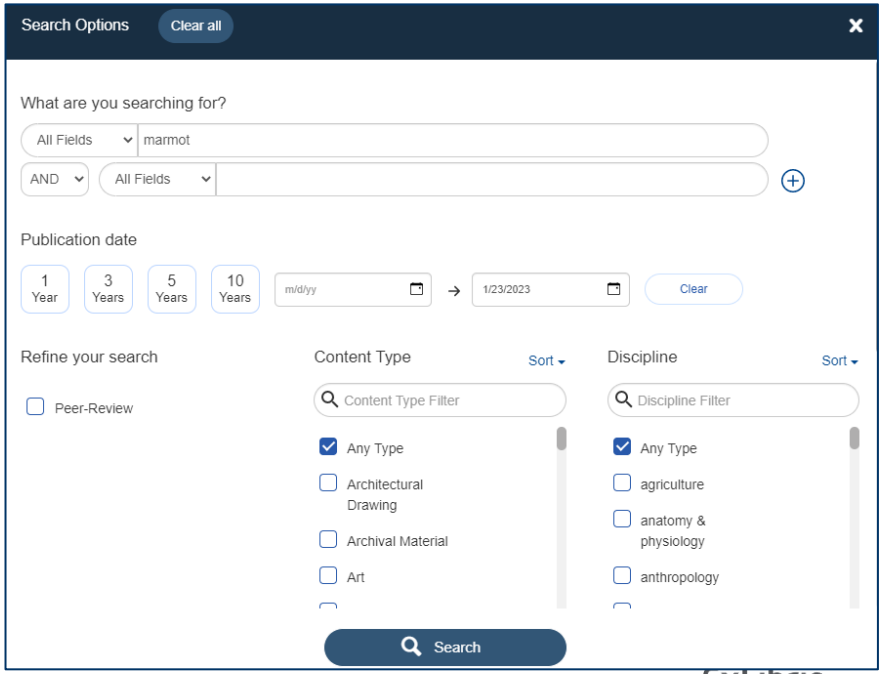
Advanced Search: Improve Search Box Layout

Improve search box placement based on feedback

- All search boxes on the Advanced Search stack in one column
- Matches user expectation and layout of most major databases



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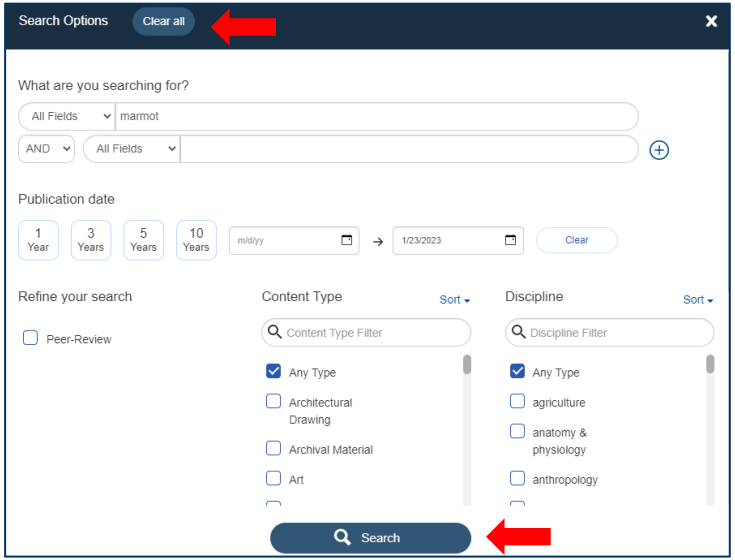
Advanced Search: Updated Look and Feel Controls

Added missing controls for font and button colors on the Advanced Search form

- Colors for the font and button for “Clear All” and “Search” are now customizable



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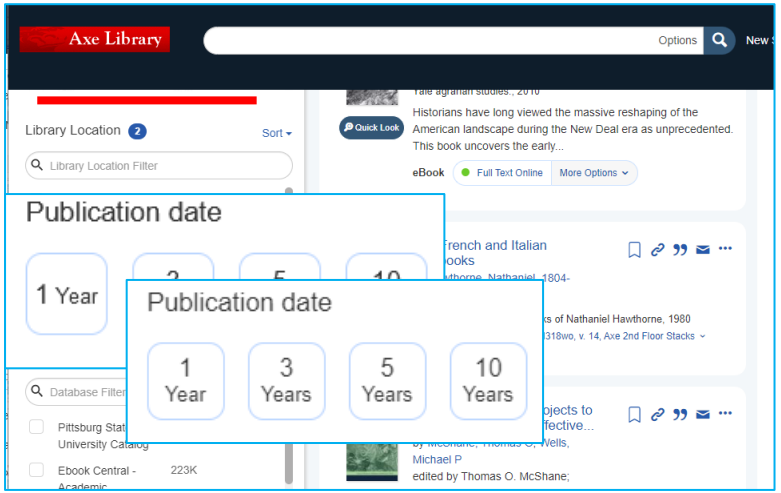
Summon UI Refresh: Additional Fixes

Improve Advanced Search Page based on your feedback

- Addressed issue with translation issue with "Search Options" on advanced search
- Fixed label formatting for “1 Year” button in Firefox
- Library location facet values selected on Advanced Search are now displayed on the Search Results page



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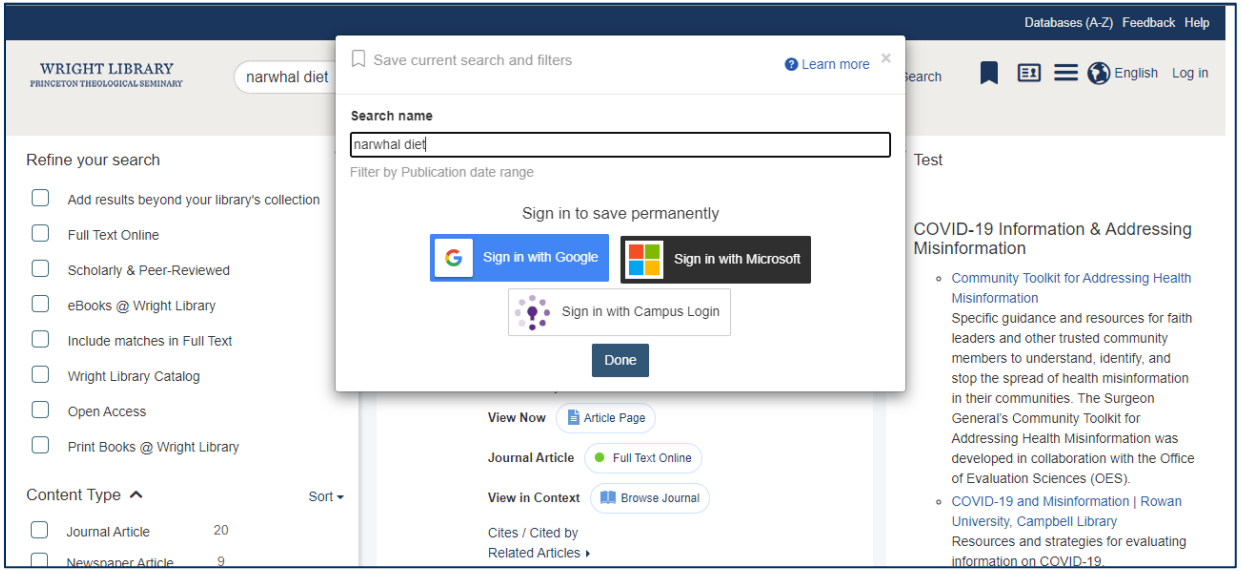
Sierra via Summon: SAML for Saved Searches

Ability to log into Saved Searches using SAML authentication

- Adds SAML integration to Saved Searches for Sierra via Summon institutions
- Allows for storage of Saved Searches on Summon Servers
- GDPR Compliant
- In addition to MS OneDrive and Google Drive logins



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May Release

Preview starting April 19

Live in Production on May 3

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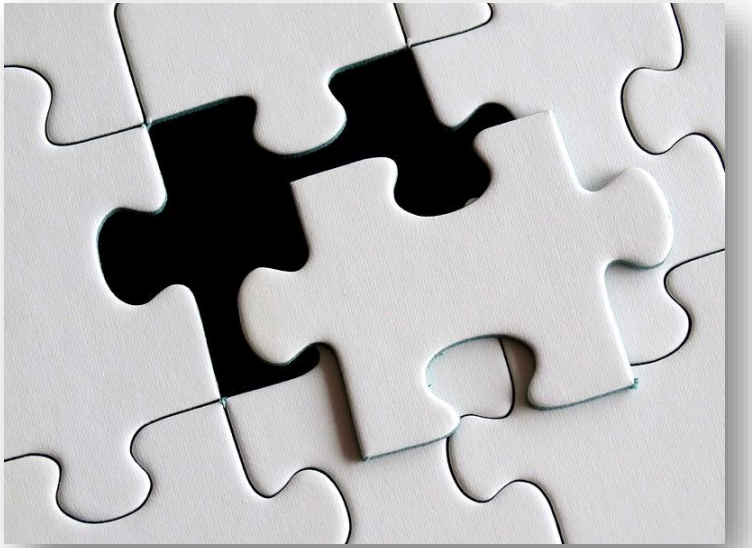
LTI Support for Summon

Implementation of an LTI for Summon

- Ability to integrate Summon into Learning Management Systems (LMS) such as Canvas
- Develop LTI (Learning Tools Interoperability) Support

* The majority of the development work (phase 1) will be completed in May; implementation of the newly developed service will require a second phase outside of development releases



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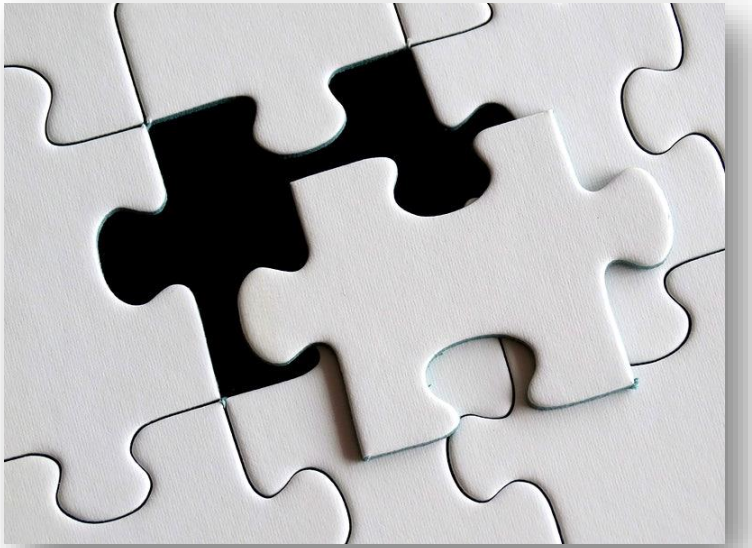
LTI Support for Summon

Implementation of an LTI for Summon

Initial tools will include:

- Ability to display a record or a list of up to 10 results in LMS
- Link to a specific resource or page
- Link to search box



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Google Analytics

Support for Google Analytics 4

- Improve reporting by updating Google Analytics to support current version
- Also includes Tag Manager Support
- Currently live

Note: Google support for legacy analytics ends July 1, 2023

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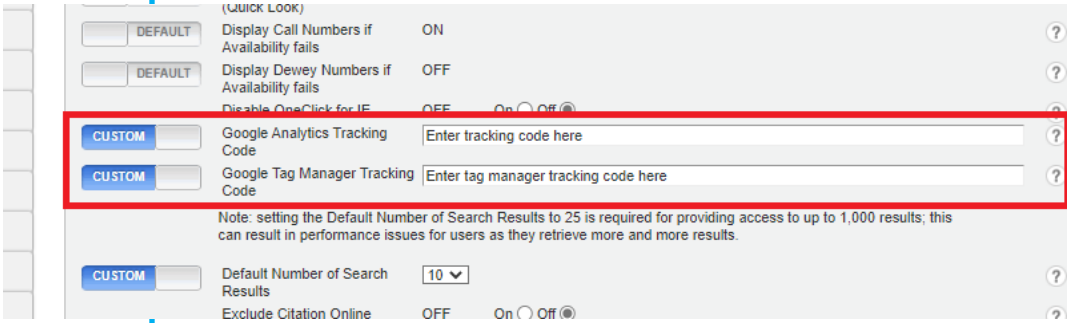
Google Analytics

How to Activate Google Analytics 4

- Configure this functionality in the Admin Console, under Settings > General
- Enter your Google Analytics Tracking Code and your Google Tag Manager Tracking Code by switching those controls from Default to Custom and entering the code in the provided blank
- Then click Save
- Modifications will be applied in 5 minutes or less



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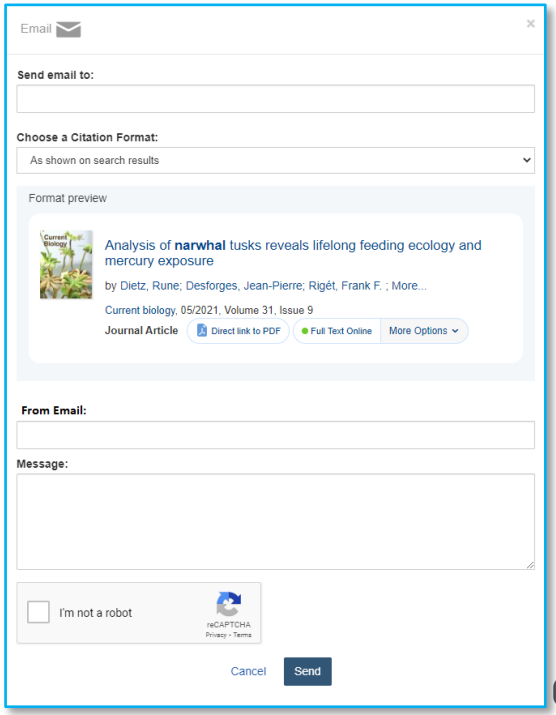
Mandatory Sender Email Field in Summon

Provide the option for a sender's email for citations

- Allows institutions to add a field requesting the user's email address
- Address will be included in the body of the email to assist with follow up for staff, when needed
- Configurable as a required field by institution



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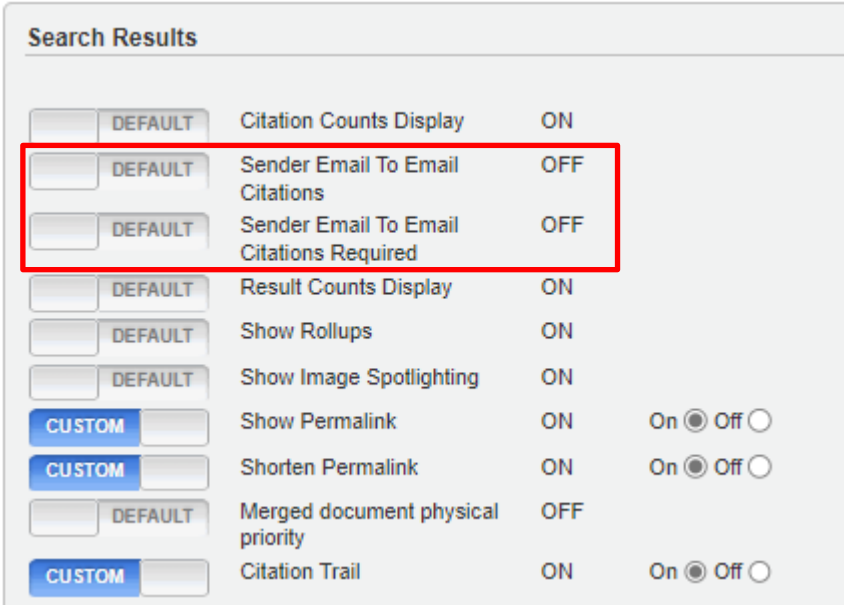
Mandatory Sender Email Field in Summon

How to Configure Mandatory Sender Email Field

- Configure this functionality in the Admin Console, under Settings > Search Results
- To add the Sender Email field to emailed citations, set “Sender Email to Email Citations” to Custom > On
- To make the Sender Email field required, set “Sender Email to Email Citations Required” to Custom > On
- Then click Save



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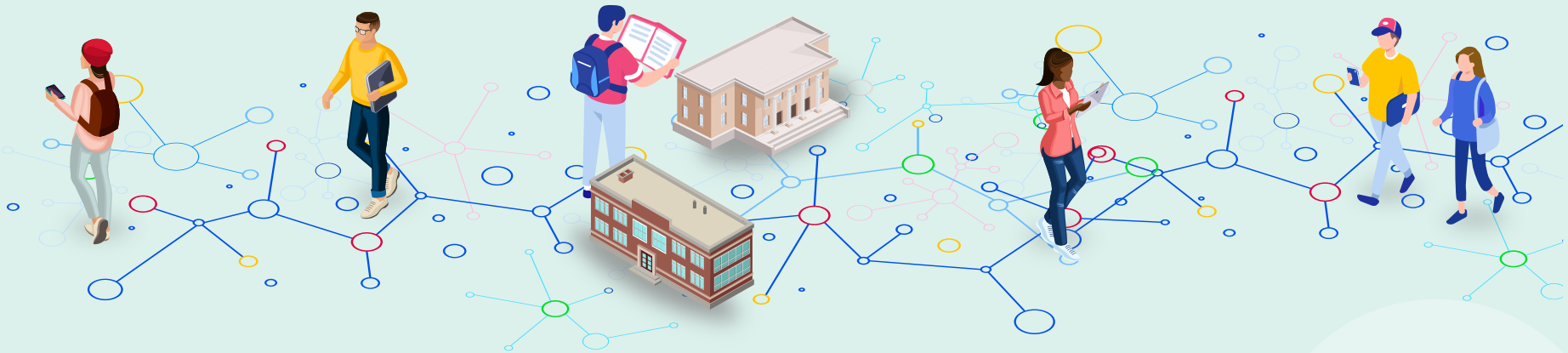

Summon Releases for Second Half of 2023

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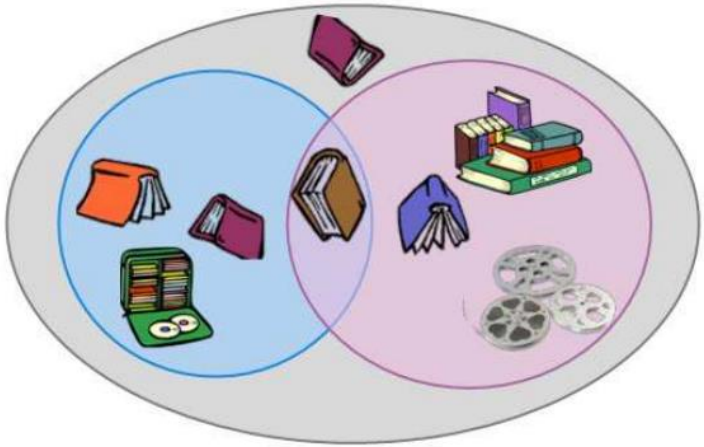
Scopes for Summon Searches

Allow users to ‘pre-filter’ their search, limiting to a specific group vs. searching the full catalog

- Create scopes, and prioritize display order when there are multiple scopes
- Limit to local records
- Add or remove resources by ISBN/ISSN to a search scope
- Add or remove institutional repositories to a search scope
- Add or remove library locations to a search scope



2023 H2

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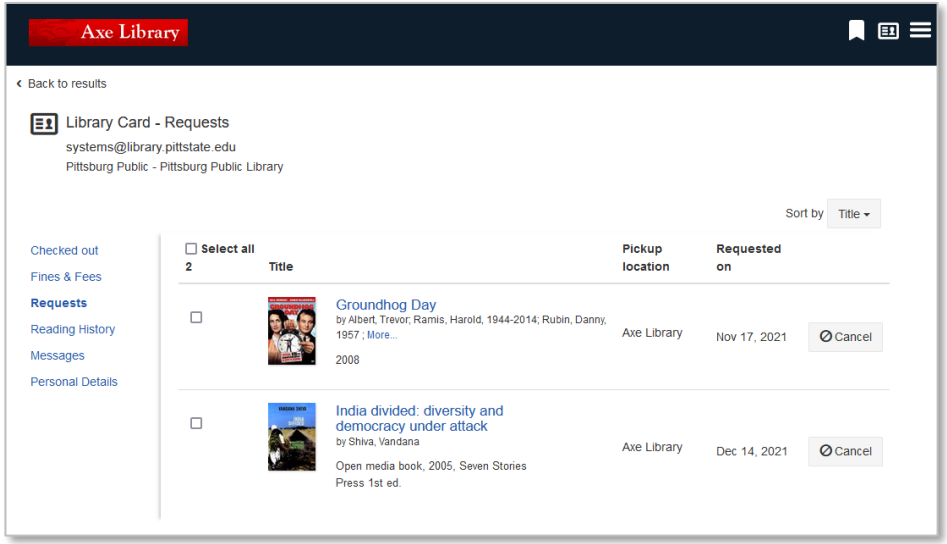
Sierra via Summon: Course Reserves

Provide Course Reserve Support for Sierra via Summon

- Ability to provide access to course reserve links and data in Sierra via the Summon User Interface



2023 H2

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Improve the Quick Look Pane Layout

A more flexile layout to accommodate various metadata

- Usefulness of Quick Look pane varies based on the amount and type of metadata available for display
- Adjust the layout so the Quick Look displays all information well regardless of what information is absent or present

NERS

2023 H2

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Display 5xx Note Fields in Summon

Allow institution to add 5xx note fields to Quick Look

- Display both a label for and the value in the field for a result
- If the field is blank, it and its label should not be displayed

* Display of fields may require mapping and content processing and require implementation assistance by Ex Libris for each institution

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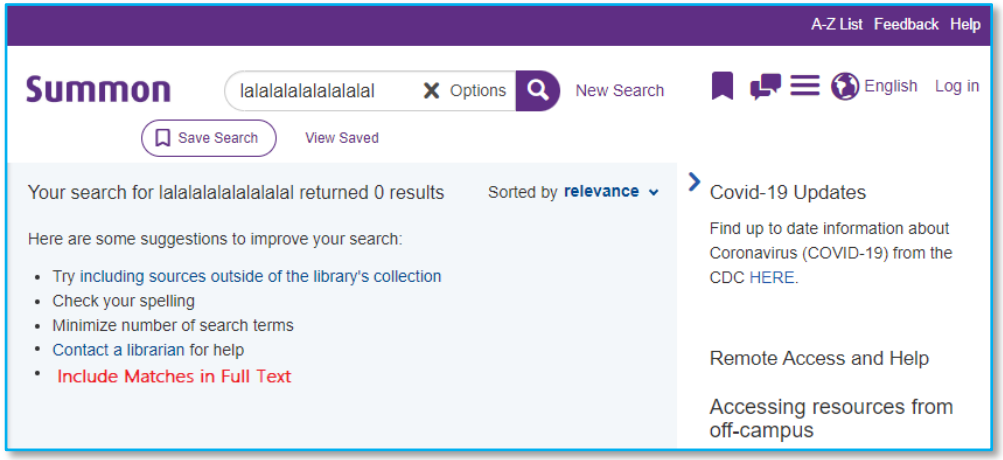
“Include Matches in Full Text” to Search Suggestions

Improve the user experience on the Zero Results Page

- Add the ability to apply the “Include Matches in Full Text” facet via a link on the Zero Results Page
- Configurable by institution



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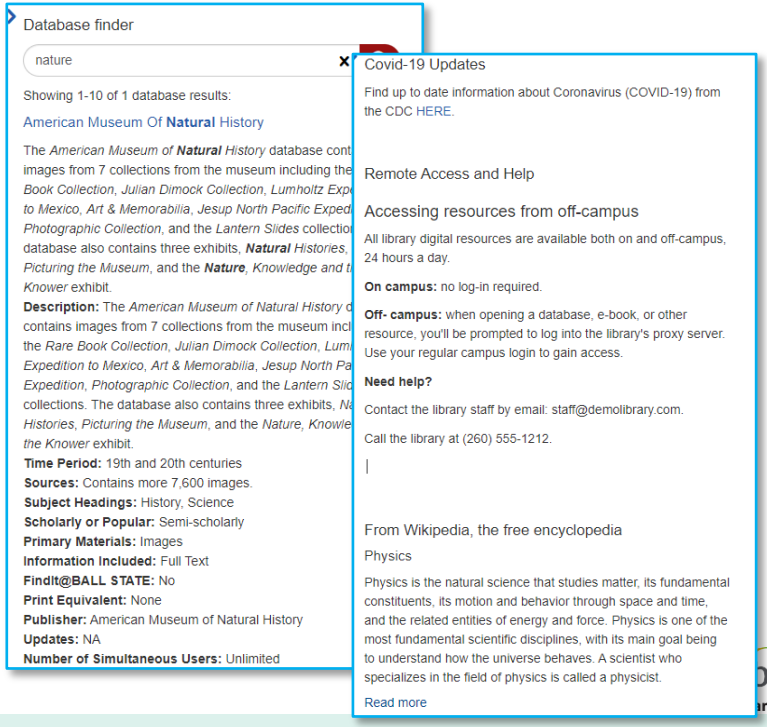
Ability to Customize of Elements in the Right Pane

Improve the layout options for the right-hand pane

- Allow flexibility for number of results displayed by the Springshare Database Finder widget
- Allow institutions to determine order of display for Database Finder, custom panels, and Topic Explorer



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2023 H2

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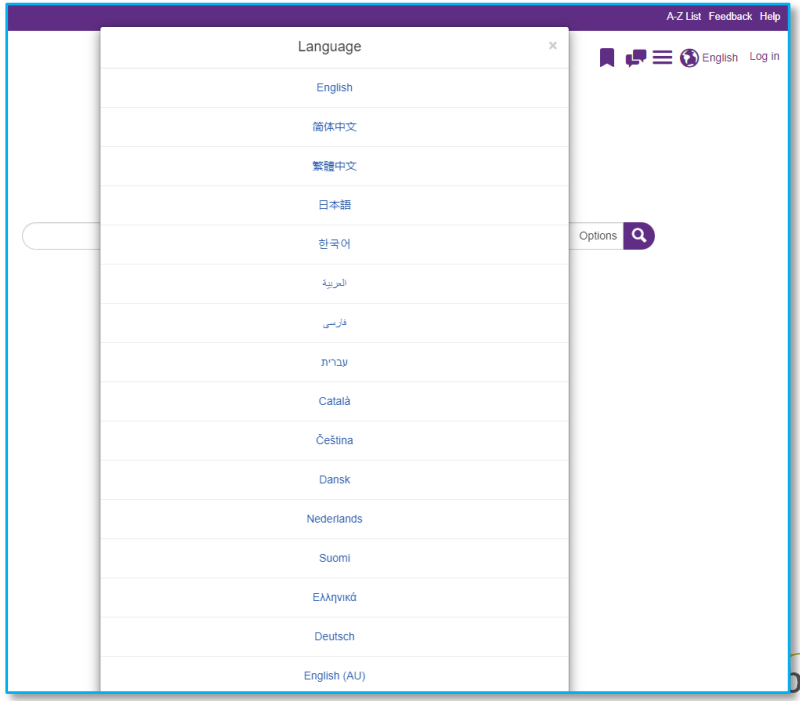
Ability to Match Language Settings of Summon with 360 Link

Ensure language parameter is passed from Summon to 360 Link

- Language set by the user in the Summon user interface will also be applied in 360 Link to maintain the selected language



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2023 H2

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Prevent eBook and Computer File Records from Merging

Reduce confusion caused by eBooks listed as Computer Files

- Prevent Computer File records to merge with any other Content Type
- Only allow Computer File type records to merge with each other

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Ongoing Improvements

Other	Accessibility
	Analytics

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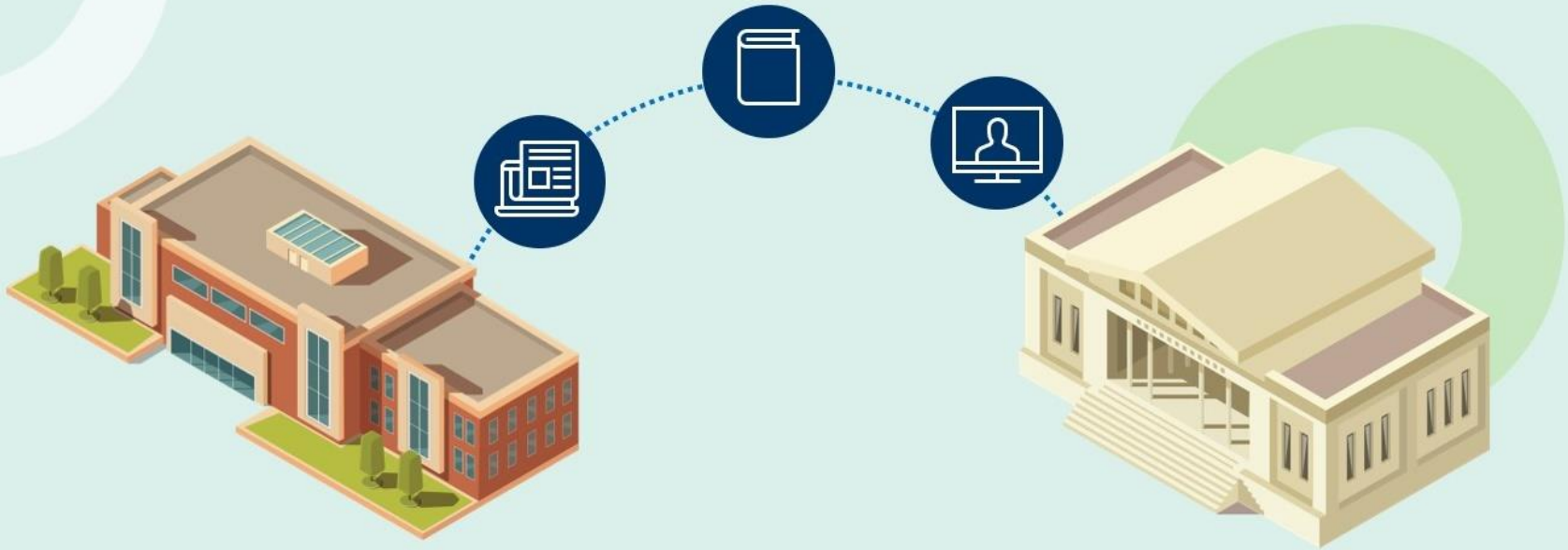

CDI Improvements

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CDI Data Quality and Rights enhancements

- **CDI Rights Processing**
  - Reduce to 24 – 30 hours average
- **Data quality**
  - Improve consistency of language and publication date fields
  - Better identification of book reviews
  - Improve OA-handling, with the addition of Unpaywall as an indexed collection
- **Bigger, longer term data projects:**
  - Addition of a secondary resource types for CDI
  - Connect author names to ORCIDs (possibly other IDs) and normalize the author name
  - Separate keywords and (normalized) subjects

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Search and Ranking

- **Known item search enhancement with AI**
  - Use of an AI-based tool to identify and parse citations for more accurate results
- **Support of Melingo** (Hebrew Search Plugin) in CDI
- **Ongoing enhancements** – based on feedback and new content

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Quicklinks

- Adding more content providers is 2023 priority
- Now with 34 supporting providers
- Over 10,500 collections with 1.55 billion records
- Linking success rates – 99%

Provider	Content	Type of Quicklink (PDF/HTML)
ACM Digital Library	All	PDF
Baker	All	HTML
ProQuest	All Content excluding eBooks on the ProQuest Platform: https://linkinghelp.proquest.com	HTML (in most cases a link to download the PDF full text is included within the article)
SAGE Publications	Journals under https://journals.sagepub.com	PDF, HTML
Springer Nature	Journals and Books under https://link.springer.com	PDF, HTML
Wiley Online Library	Journals and Books under https://onlinelibrary.wiley.com	PDF, HTML
Sloane	Journals Content under https://sloane.org	PDF
IOP Publishing	All	PDF
National Library of Medicine	Content which is part of PubMed 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/	PDF, HTML
Thieme	All journal content besides conference proceedings under https://www.thieme-connect.de/products/ejournals/journal	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
University of Chicago Press		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	Journals Content under https://www.jstor.org/	PDF, HTML
American Institute of Aeronautics and Astronautics	Journals, Standards, Proceedings, Books under https://arc.aiaa.org	Journals, Standards, Proceedings (PDF, HTML) Books (HTML)
Alexander Street	All	HTML
Taylor & Francis	All	PDF, HTML
Brepols Publishers	All	PDF
World Scientific Publishing	Journals	PDF
Cambridge University Press	Journals, Books	HTML
American Chemical Society	Journals, Books	PDF, HTML
[redacted] (Higher Education Press)	Journals	HTML
American Society for Microbiology	Journals	PDF, HTML
INFORMS	All	PDF, HTML
Edinburgh University Press	Journals under https://www.eupublishing.com/	PDF, HTML
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360 and Intota: 2023 Progress

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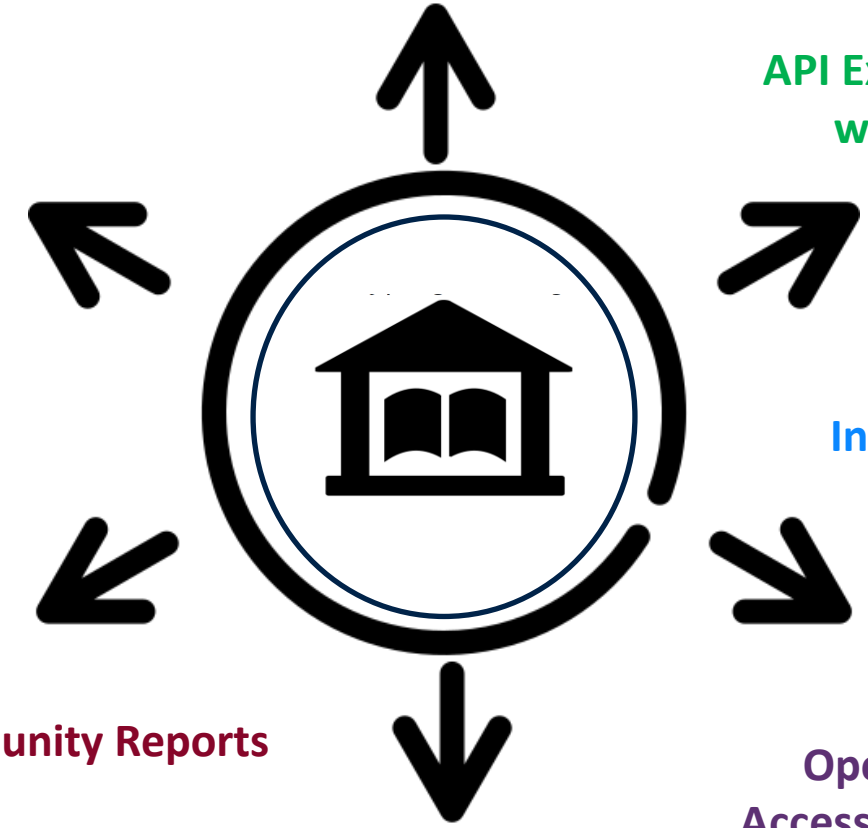
2023 Roadmap Highlights

Auto-Holdings Management with KBART Recommended Practice

API Expansion for Integration with External Systems



Accessibility

Infrastructure Investment

Response to Community Reports

NERS Project
Open Access Indicator
Access to Summon Analytics

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Quarterly Release Dates

- February 1
- May 3
- August 2
- November 1

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2023 February Release

- New COUNTER report status for deleted reports
- Reduction in the number of changed records in 360 MARC Updates
- New linkers
- Consortium Edition improvements
- KBART upload capabilities in Intota

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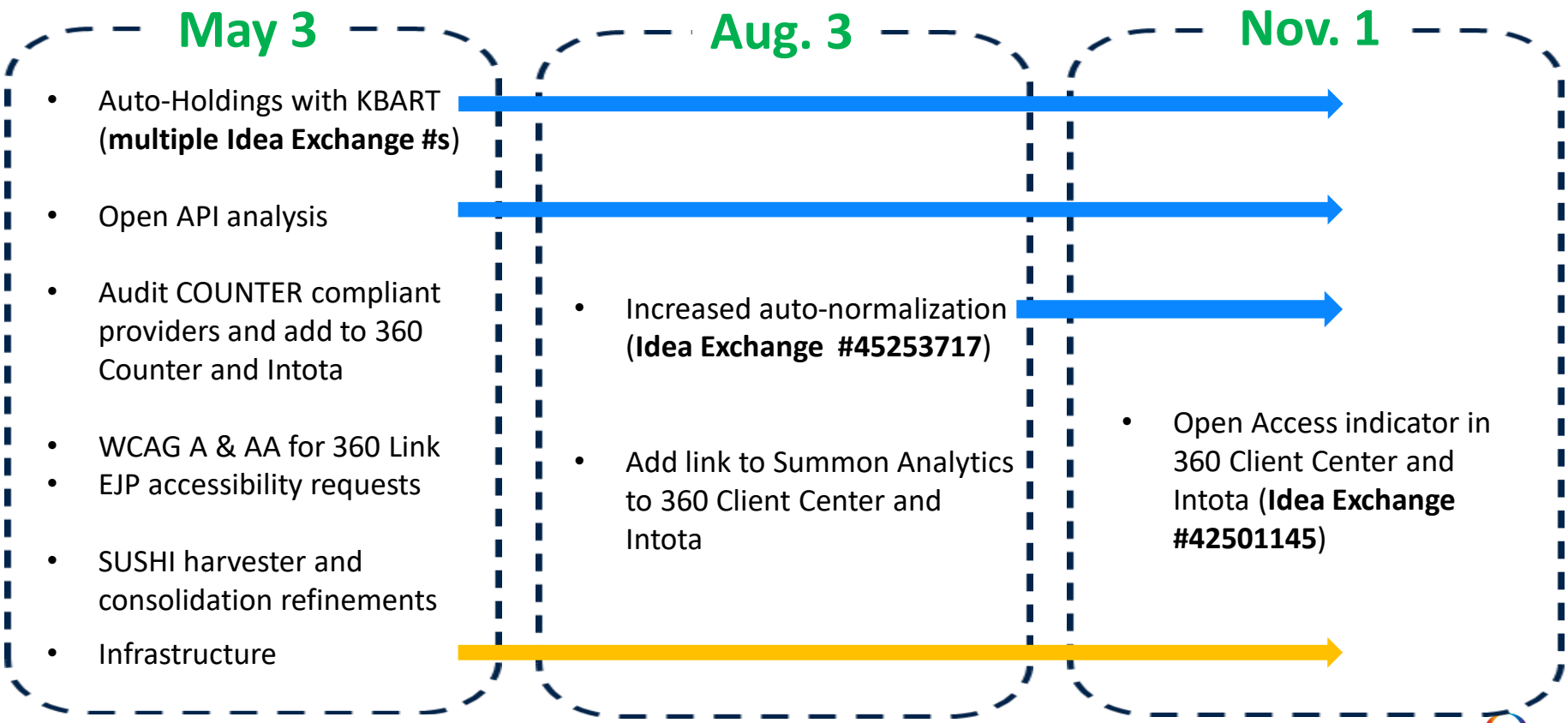
Delivery Targets



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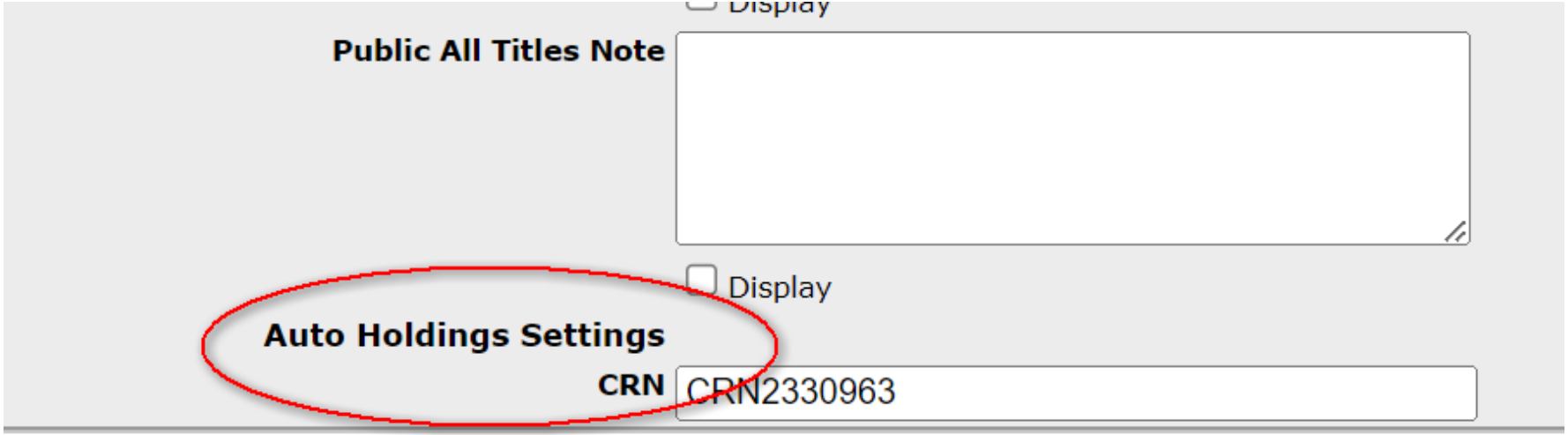
Auto-Holdings Infrastructure



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360 Link A, AA Accessibility Solutions

Criteria	Conformance Level	Remarks and Explanations
1.3.1 Info and Relationships (Level A) Also applies to: EN 301 549 Criteria • 9.1.3.1 (Web) • 10.1.3.1 (Non-web document) • 11.1.3.1.1 (Open Functionality Software) • 11.1.3.1.2 (Closed Software) • 11.8.2 (Authoring Tool) • 12.1.2 (Product Docs) • 12.2.4 (Support Docs) Revised Section 508 • 501 (Web)(Software) • 504.2 (Authoring Tool) • 602.3 (Support Docs)	Partially supports	The site employs the following to support this: • labels/ids with form elements • markup for lists & headings • CSS to control the visual presentation of text • Correct use of semantic markup (bold, italics, etc.) **Exceptions** • Export options radio buttons are not labelled • Email > Required fields are not semantically marked as required • Citation style dropdown is not labelled • Close and hide sidebar controls are not labelled

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Your Direct Impact

Through the New Enhancement Request System (NERS) & the Idea Exchange

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NERS Candidates Completed in 2022

- Refine Content Type Web Resource to Identify Online Newspaper Articles
- Display Coverage Dates for E-journals in Summon Results
- Ensure OA link Is Available for Open Access Content
- Collection Discovery for Summon over Alma
- Design and plan for LTI for Summon

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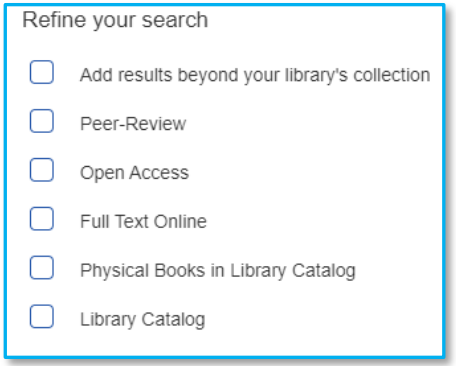
Idea Exchange suggestions completed in 2022

- Ability to re-order the facets listed in Refine Your Search section of the Summon results display
- Improved usability for Advanced Search
- Make Custom Panels visible for mobile users
- Make citation styles customizable
  - Includes making the following styles available via citationstyles.org: Chicago Notes-Bibliography Style, MHRA referencing citation style, Council of Science Editors (CSE) formatting style, the style guide for ACS (American Chemical Society), and to current editions for many other supported styles, including AGLC4



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Idea Exchange suggestions completed in 2022

- Limit the EJP autocomplete suggestions to subscribed titles
- Show the MARC record availability percentage at the database level
- Change EJP sort order to favor main title over alternate titles
- Database order in 360 Link and EJP: Make it possible to upload changes in a file
- Allow KBART uploading for library specific holdings
- Included as part of developing KBART support, began developing solutions for auto-holdings with additional providers
- Consortium Sharing: “Terms of use” should be shown in EJP on “From Consortium titles

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Community Engagement

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Webinar next week – Thursday April 27, 2023

SCAN ME

Link in the chat

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Upcoming User Group Events

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Questions?

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