



What's New with Summon & 360/Intota Services



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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

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)

Summon Roadmap Highlights



2023 H1

- 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)



2023 H2

- 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

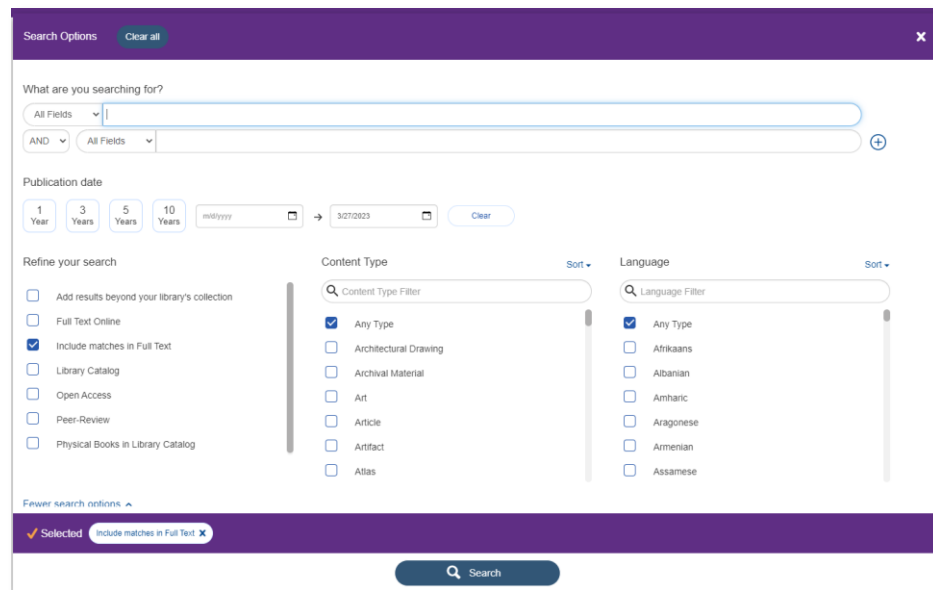


Summon Recent Accomplishments

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



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

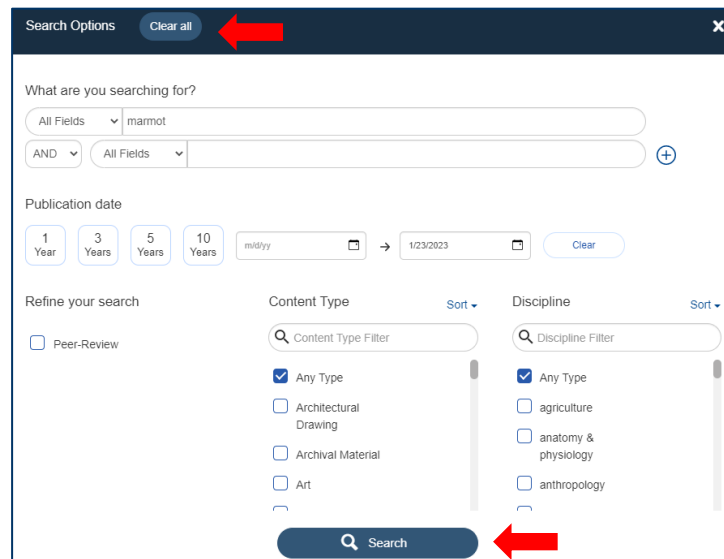
The screenshot displays a search interface with the following components:

- Search Options:** A dark header bar with a "Clear all" button and a close icon (X).
- Search Query:** A text input field containing "marmot" with a dropdown menu set to "All Fields".
- Advanced Search:** A second input field with a dropdown set to "AND" and another dropdown set to "All Fields".
- Publication date:** A section with radio buttons for "1 Year", "3 Years", "5 Years", and "10 Years". It includes a date format "m/d/yy" and a date input field showing "1/23/2023" with a "Clear" button.
- Refine your search:** A section with a checkbox for "Peer-Review".
- Content Type:** A section with a search filter input and a list of options: "Any Type" (checked), "Architectural Drawing", "Archival Material", and "Art".
- Discipline:** A section with a search filter input and a list of options: "Any Type" (checked), "agriculture", "anatomy & physiology", and "anthropology".
- Search Button:** A large dark button with a magnifying glass icon and the text "Search".

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

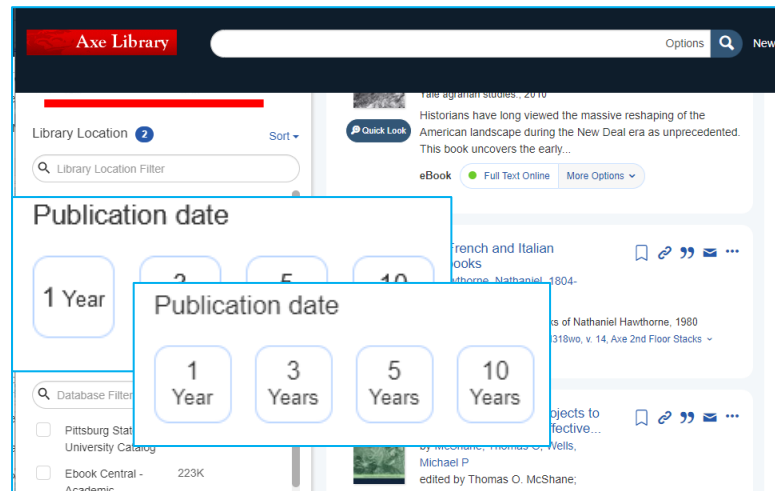


The screenshot shows the 'Search Options' dialog box. At the top right, there is a 'Clear all' button with a red arrow pointing to it. Below the search input fields, there are filters for 'Publication date' (1 Year, 3 Years, 5 Years, 10 Years, m/yyyy, 1/23/2023, Clear) and 'Refine your search' (Peer-Review). There are also sections for 'Content Type' and 'Discipline' with filters and checkboxes. At the bottom right, there is a 'Search' button with a red arrow pointing to it.

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



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

The screenshot displays the Wright Library search interface. At the top, the search term 'narwhal diet' is entered. A modal window is open, titled 'Save current search and filters', which prompts the user to 'Sign in to save permanently'. The modal offers three authentication options: 'Sign in with Google', 'Sign in with Microsoft', and 'Sign in with Campus Login'. Below the modal, the search results are visible, including a 'Journal Article' with 'Full Text Online' available. The interface also shows a 'Refine your search' section with various filters and a 'Content Type' table.

Content Type	Count
Journal Article	20
Newspaper Article	9



May Release

Preview starting April 19

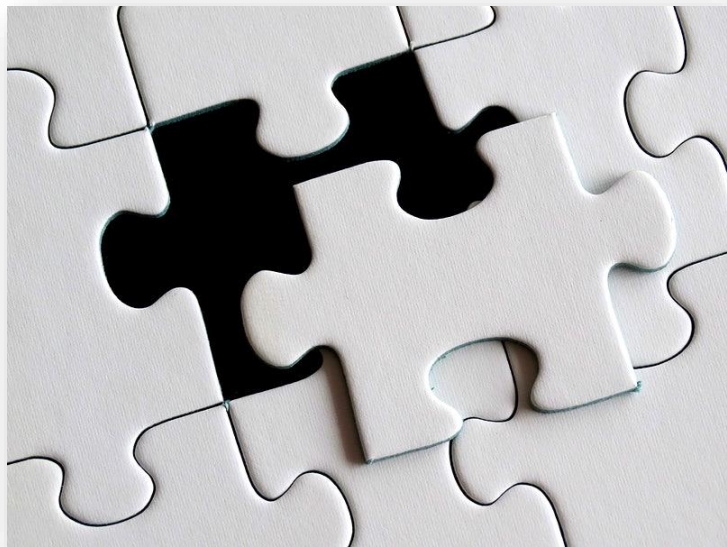
Live in Production on May 3

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



NERS

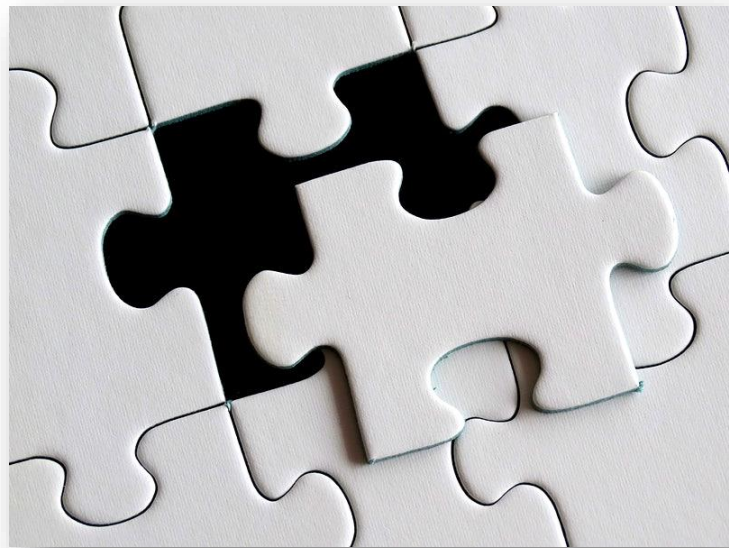


LTI Support for Summon

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



NERS



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



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

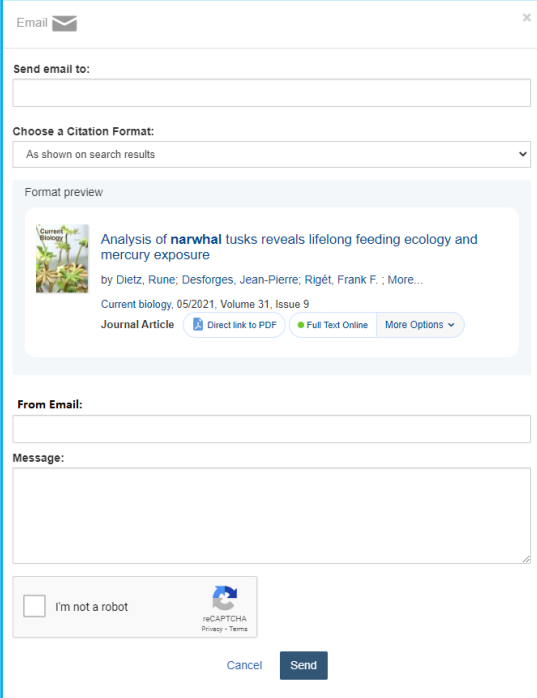
(Quick Look)

<input type="checkbox"/> DEFAULT	Display Call Numbers if Availability fails	ON	?
<input type="checkbox"/> DEFAULT	Display Dewey Numbers if Availability fails	OFF	?
	Disable OneClick for IE	OFF On Off	?
<input checked="" type="checkbox"/> CUSTOM	Google Analytics Tracking Code	Enter tracking code here	?
<input checked="" type="checkbox"/> CUSTOM	Google Tag Manager Tracking Code	Enter tag manager tracking code here	?
	Note: setting the Default Number of Search Results to 25 is required for providing access to up to 1,000 results; this can result in performance issues for users as they retrieve more and more results.		
<input checked="" type="checkbox"/> CUSTOM	Default Number of Search Results	10	?
	Exclude Citation Online	OFF On Off	?

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



The screenshot shows the 'Email' dialog box in Summon. It includes a 'Send email to:' text input field. Below it is a 'Choose a Citation Format:' dropdown menu set to 'As shown on search results'. A 'Format preview' section displays a citation for 'Analysis of narwhal tusks reveals lifelong feeding ecology and mercury exposure' by Dietz, Rune; Desforges, Jean-Pierre; Rigét, Frank F.; et al. from 'Current biology, 05/2021, Volume 31, Issue 9'. The preview includes a thumbnail image and buttons for 'Direct link to PDF', 'Full Text Online', and 'More Options'. Below the preview is a 'From Email:' text input field. At the bottom is a 'Message:' text area. A checkbox labeled 'I'm not a robot' is next to a reCAPTCHA widget. 'Cancel' and 'Send' buttons are at the bottom right.

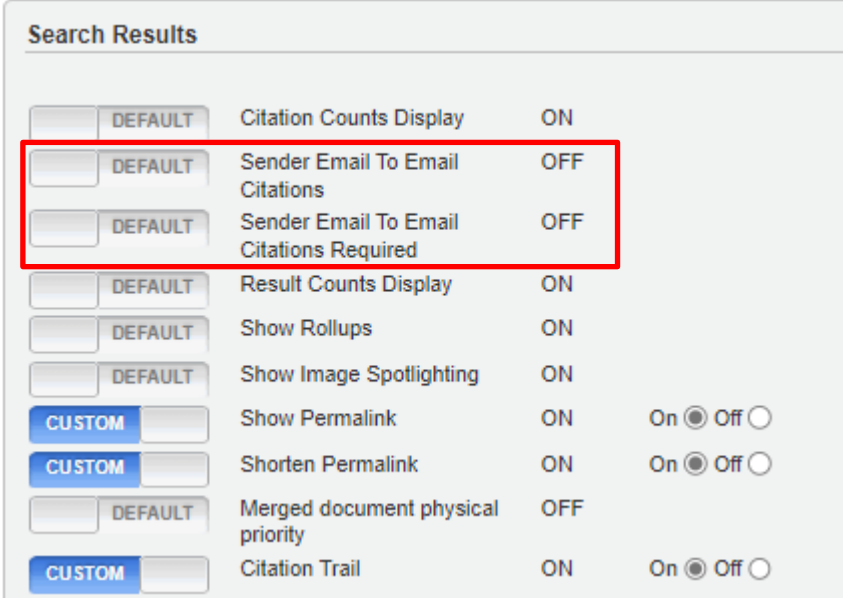
NERS



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



Search Results			
<input type="checkbox"/>	DEFAULT	Citation Counts Display	ON
<input type="checkbox"/>	DEFAULT	Sender Email To Email Citations	OFF
<input type="checkbox"/>	DEFAULT	Sender Email To Email Citations Required	OFF
<input type="checkbox"/>	DEFAULT	Result Counts Display	ON
<input type="checkbox"/>	DEFAULT	Show Rollups	ON
<input type="checkbox"/>	DEFAULT	Show Image Spotlighting	ON
<input checked="" type="checkbox"/>	CUSTOM	Show Permalink	ON <input checked="" type="radio"/> Off <input type="radio"/>
<input checked="" type="checkbox"/>	CUSTOM	Shorten Permalink	ON <input checked="" type="radio"/> Off <input type="radio"/>
<input type="checkbox"/>	DEFAULT	Merged document physical priority	OFF
<input checked="" type="checkbox"/>	CUSTOM	Citation Trail	ON <input checked="" type="radio"/> Off <input type="radio"/>

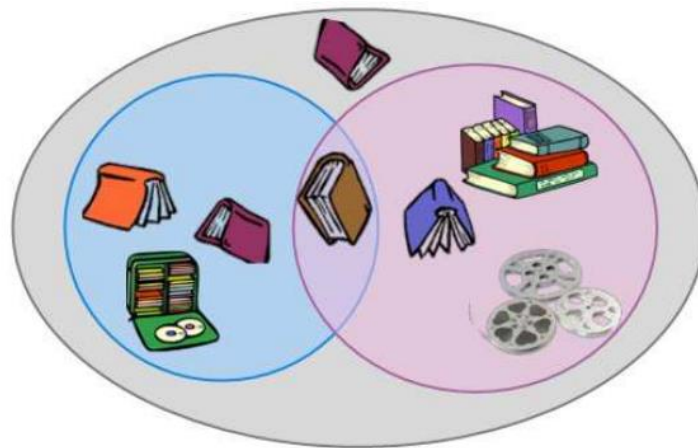


Summon Releases for Second Half of 2023

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



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

Axe Library

< Back to results

Library Card - Requests
systems@library.pittstate.edu
Pittsburg Public - Pittsburg Public Library

Sort by Title ▾

Checked out	Select all	Title	Pickup location	Requested on	
Fines & Fees	<input type="checkbox"/>	 Groundhog Day by Albert, Trevor, Ramis, Harold, 1944-2014; Rubin, Danny, 1957 ; More... 2008	Axe Library	Nov 17, 2021	<input type="button" value="Cancel"/>
Requests	<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"/>
Reading History					
Messages					
Personal Details					



Improve the Quick Look Pane Layout

A more flexible 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

The screenshot shows a 'Quick Look' window for a journal article. The article title is '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. The article is from 'Marine Mammal Science'. The abstract text is visible, discussing narwhals as sentinel species and their diet changes over time. The 'Record Details' section includes the publication title 'Marine mammal science', volume 31, issue 1, language English, publisher Blackwell Publishing Ltd, date 01/2015, and copyright 2014 Society for Marine Mammalogy. The 'Subjects' section lists terms like diet, fatty acids, food chains, long-term data, marine migration patterns, monodon monoceros, stable isotopes, and temporal trends. The 'Full Text Online' button is highlighted in green.

NERS



2023 H2

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

NERS



2023 H2

Quick Look < 1 Of 100 Results > X

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.

Journal Article Direct link to PDF

Full Text Online More Options

Peer-Review
Open Access

Subjects

- diet
- Fatty acids
- Food chains
- long-term data
- Marine migration patterns
- Monodon monoceros
- stable isotopes
- temporal trends

Record Details

Publication Title
Marine mammal science

Volume
31

Issue
1

Language
English

Publisher
Blackwell Publishing Ltd

Date
01/2015

Copyright
2014 Society for Marine Mammalogy

Abstract

Narwhals (*Monodon monoceros*) are sentinel species in the Arctic and to investigate marine food web changes from 1982-2011 we examined diet using fatty acids, delta 15N, and delta 13C, in narwhals from Baffin Bay (BB) and northern Hudson Bay (NHB). We predicted temporal changes would be greater in NHB due to a significant reduction in summer ice cover. In NHB, delta 15N significantly increased, delta 13C displayed a parabolic trend, and fatty acids gradually shifted, albeit not significantly, over time. delta 15N was stable, delta 13C decreased, and fatty acids significantly changed over time in BB. Stable isotope mixing models indicated a dietary reduction in capelin and increase in Greenland halibut from 1994-2000 to 2006-2011 in BB, while capelin was an important dietary component for narwhals in NHB in recent years (2006-2011). These dietary changes may be attributed to changes in sea ice and narwhal migration. Seasonal dietary changes, as evidenced by changes in blubber fatty acids and skin and muscle stable isotopes, were not as apparent in the NHB population, which may be indicative of a reduced migratory distance. Long-term monitoring of narwhal diet and migratory patterns associated with reduced sea ice provides invaluable information about how the marine ecosystem will redistribute with global warming.

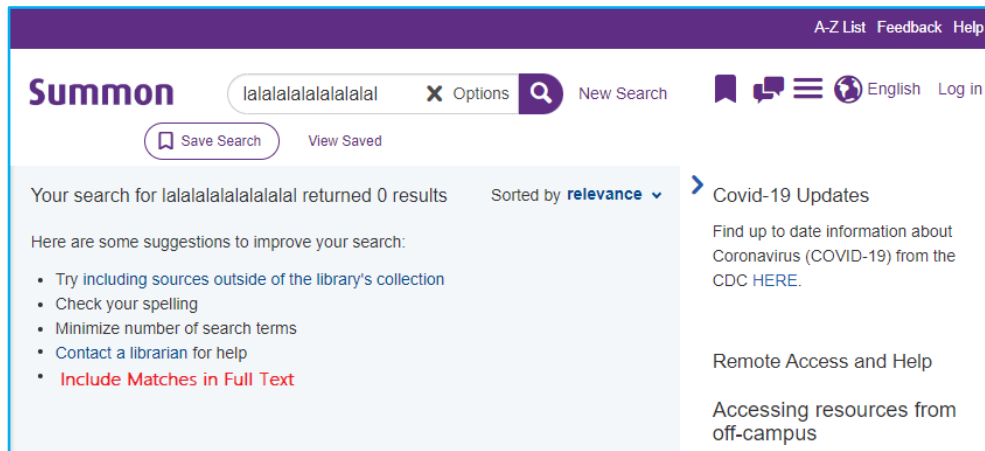
Aquatic Science & Fisheries Abstracts (ASFA) Professional

WEB OF SCIENCE 28 1

“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



The screenshot shows the Summon search interface. At the top, there is a search bar with the text "lalalalalalalalal" and a search icon. To the right of the search bar are links for "Options", "New Search", "English", and "Log in". Below the search bar, there are buttons for "Save Search" and "View Saved". The main content area displays "Your search for lalalalalalalalal returned 0 results" and "Sorted by relevance". Below this, there is a section titled "Here are some suggestions to improve your search:" with a list of suggestions: "Try including sources outside of the library's collection", "Check your spelling", "Minimize number of search terms", "Contact a librarian for help", and "Include Matches in Full Text". To the right of the suggestions, there are links for "Covid-19 Updates", "Remote Access and Help", and "Accessing resources from off-campus".

NERS



2023 H2

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

The screenshot displays a library database interface. On the left, a 'Database finder' search box contains the term 'nature'. Below the search box, it shows 'Showing 1-10 of 1 database results:' and lists the 'American Museum Of Natural History' as the result. A detailed description of this database is provided, including its contents, a description, time period, sources, subject headings, and other metadata. On the right, a 'Covid-19 Updates' panel is visible, containing information about finding up-to-date information about COVID-19, remote access and help, and contact information for the library staff.

NERS

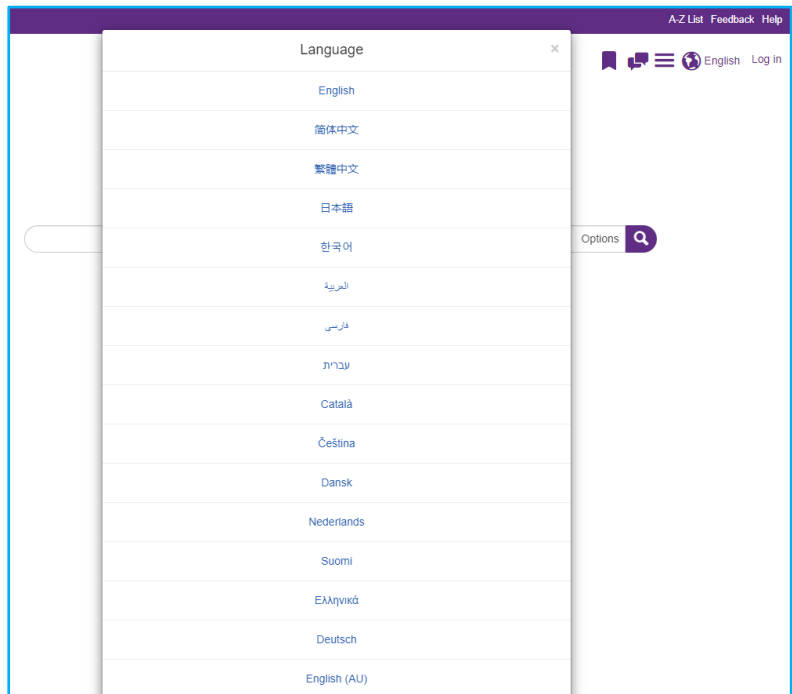


2023 H2

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



NERS



2023 H2

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



NERS



2023 H2

Ongoing Improvements

Other

Accessibility

Analytics



CDI Improvements

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 ORCID(s) (possibly other IDs) and normalize the author name
- Separate keywords and (normalized) subjects

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

- 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 Content (PDF/HTML)
ACU Digital Library	All	PDF
Elsevier	All	HTML
ProQuest	All Content excluding eBooks on the ProQuest Platform: https://www.proquest.com	HTML for most cases. HTMLs download the PDF full text is located on the track.
Routledge Publications	Journals under https://www.routledge.com	PDF/HTML
Springer Nature	Journals and eBooks under https://www.springer.com	PDF/HTML
Wiley-Blackwell	Journals and eBooks under https://onlinelibrary.wiley.com	PDF/HTML
Edoche	Journals & Content under https://www.edoche.com	PDF
IOS Publishing	All	PDF
National Library of Medicine	Content under & part of PubMed Central collection under https://pubmed.ncbi.nlm.nih.gov/	PDF/HTML
New England Journal of Medicine	Content under https://www.nejm.org	PDF/HTML
Emerald	Journals and eBooks under https://www.emerald.com/	PDF/HTML
Chico Salomon	Content under https://www.chicosalomon.com/	PDF/HTML
Thieme	All Journals content because of the content processing under https://www.thieme.com/en https://www.thieme.com/en	PDF/HTML
IEEE	Content under https://www.ieee.org	HTML
Wiley-Interscience	Journals under https://www.interscience.wiley.com/	PDF/HTML
SPRINGER	Content under https://www.springer.com	PDF/HTML
University of Chicago Press		PDF/HTML
Row Society Publications	Content under https://www.ros.org/	PDF/HTML
Project MUSE	Journals and eBooks under https://muse.jhu.edu/	Journals (PDF/HTML) Books (HTML)
JSTOR	Journals Content under https://www.jstor.org/	PDF/HTML
American Institute of Mathematics and Abstracts	Journals, Journals, Proceedings, Books under https://www.aime.org/	Journals, Journals, Proceedings (PDF/HTML) Books (HTML)
Anderson Jones	All	HTML
Taylor & Francis	All	PDF/HTML
Emerald Publishing	All	PDF
Wiley Scientific Publishing	Journals	PDF
Cambridge University Press	Journals, Books	HTML
American Chemical Society	Journals, Books	PDF/HTML
IEEE (IEEE Higher Education Press)	Journals	HTML
American Society for Microbiology	Journals	PDF/HTML
INFORMAS	All	PDF/HTML
Edinburgh University Press	Journals under https://www.edinburghup.com/	PDF/HTML
Palmerston	Books	HTML
O'Brien Press, Inc	Books	HTML
LISTED	Published applications and related content available under https://www.listed.com/ https://www.listed.com/	PDF

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



360 and Intota: 2023 Progress

2023 Roadmap Highlights

**Auto-Holdings
Management
with KBART
Recommended
Practice**

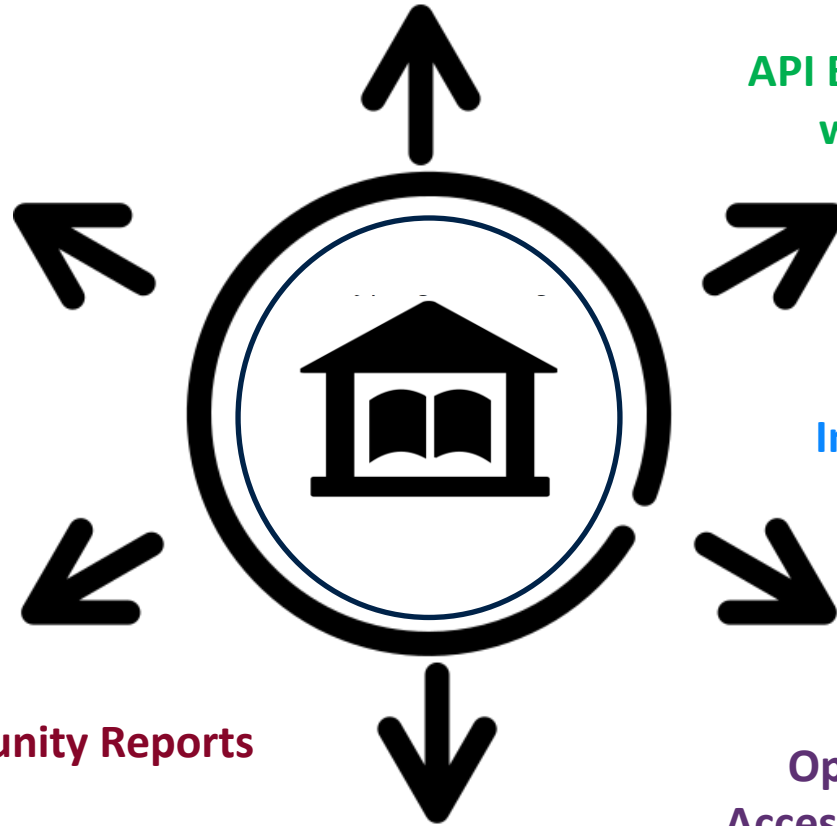
Accessibility

Response to Community Reports


**API Expansion for Integration
with External Systems**

Infrastructure Investment

**NERS Project
Open Access Indicator
Access to Summon Analytics**



Quarterly Release Dates

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



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

Delivery Targets

May 3

- Auto-Holdings with KBART
(**multiple Idea Exchange #s**)
- Open API analysis
- Audit COUNTER compliant providers and add to 360 Counter and Intota
- WCAG A & AA for 360 Link
- EJP accessibility requests
- SUSHI harvester and consolidation refinements
- Infrastructure

Aug. 3

- Increased auto-normalization
(**Idea Exchange #45253717**)
- Add link to Summon Analytics to 360 Client Center and Intota

Nov. 1

- Open Access indicator in 360 Client Center and Intota (**Idea Exchange #42501145**)

Auto-Holdings Infrastructure



Display

Public All Titles Note

Display

Auto Holdings Settings

CRN

360 Link A, AA Accessibility Solutions

Criteria	Conformance Level	Remarks and Explanations
<p>1.3.1 Info and Relationships (Level A)</p> <p>Also applies to:</p> <p>EN 301 549 Criteria</p> <ul style="list-style-type: none"> • 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) <p>Revised Section 508</p> <ul style="list-style-type: none"> • 501 (Web)(Software) • 504.2 (Authoring Tool) • 602.3 (Support Docs) 	Partially supports	<p>The site employs the following to support this:</p> <ul style="list-style-type: none"> • 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.) <p>Exceptions</p> <ul style="list-style-type: none"> • 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



Your Direct Impact

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

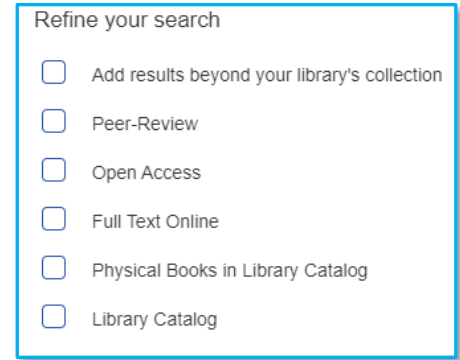
NERS Candidates Completed in 2022

- 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



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



Refine your search

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

<https://ideas.exlibrisgroup.com/>

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

<https://ideas.exlibrisgroup.com/>



Community Engagement

Webinar next week – Thursday April 27, 2023

ExLibris  innovative
Part of Clarivate

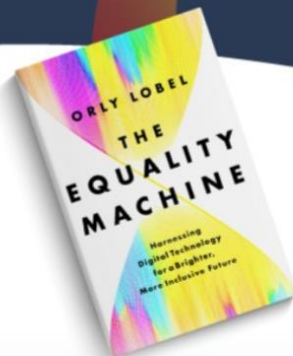


Ex Libris & Innovative present:

Diversity and inclusion by design – How technology can ensure a better world



Orly Lobel
Award-Winning Author



April 27, 2023

11:00 am EDT (New York)
4:00 pm GMT+1 (London)



SCAN ME

Link in the chat

Upcoming User Group Events





Questions?

Thank you!

Brent.Cook@Clarivate.com
Amy.Pemble@Clarivate.com

