



Summon & 360 and Intota Services Update

May 2022

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- Review Summer 2023 Roadmap
- Highlights for CDI Development in 2023
- 360 and Intota Services Updates
- Upcoming Webinars and Community Involvement
- Questions?



Summon 2023 Roadmap

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



February Release

Production Environment: February 1

Advanced Search: Improve Search Box Layout

Improve search box placement based on feedback

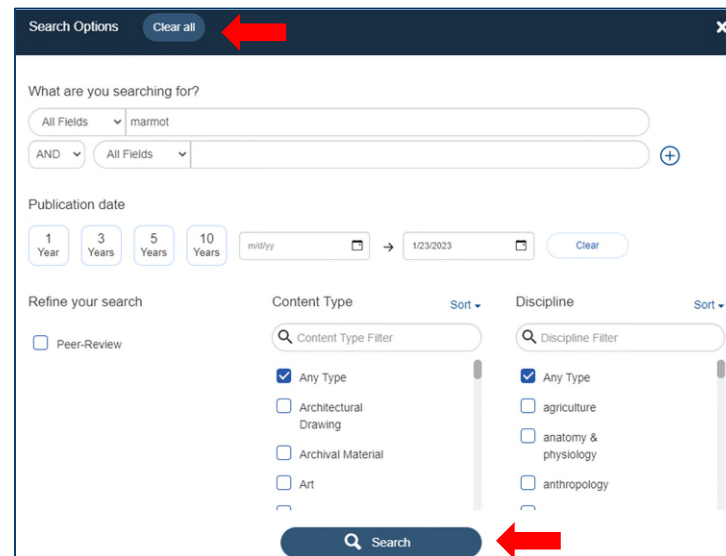
- All search boxes on the Advanced Search stack in one column
- Matches user expectation and layout of most major databases

The screenshot displays a search interface titled "Search Options" with a "Clear all" button. The main search area asks "What are you searching for?" and features a search input field containing "marmot" and a dropdown menu set to "All Fields". Below this is a second search bar with a dropdown set to "AND" and another "All Fields" dropdown, followed by a plus sign. The "Publication date" section includes radio buttons for "1 Year", "3 Years", "5 Years", and "10 Years", a date input field with "m/d/yyyy" format, a date picker icon, a date "1/23/2023", and a "Clear" button. The "Refine your search" section has a checkbox for "Peer-Review". The "Content Type" section has a search filter and a list of options: "Any Type" (checked), "Architectural Drawing", "Archival Material", "Art", and "Image". The "Discipline" section has a search filter and a list of options: "Any Type" (checked), "agriculture", "anatomy & physiology", "anthropology", "biology", "business", "chemistry", "computer science", "engineering", "environmental science", "geography", "health sciences", "history", "law", "life sciences", "mathematics", "medicine", "music", "nursing", "physical sciences", "social sciences", "theater", "veterinary medicine", and "writing". A "Search" button is at the bottom.

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 displays the 'Search Options' interface. At the top right, a 'Clear all' button is highlighted with a red arrow. Below the search input fields, the 'Publication date' section includes radio buttons for '1 Year', '3 Years', '5 Years', and '10 Years', along with a date range selector set to 'midly' to '1/23/2023' and a 'Clear' button. The 'Refine your search' section features a 'Peer-Review' checkbox. The 'Content Type' and 'Discipline' sections each have a search filter and a list of categories with checkboxes. The 'Content Type' list includes 'Any Type' (checked), 'Architectural Drawing', 'Archival Material', and 'Art'. The 'Discipline' list includes 'Any Type' (checked), 'agriculture', 'anatomy & physiology', and 'anthropology'. At the bottom center, a 'Search' button is highlighted with a red arrow.

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

The screenshot displays the 'Search Options' overlay in a purple-themed interface. At the top, there are 'Search Options' and 'Clear all' buttons. Below this is a search bar with a dropdown menu set to 'All Fields'. A second search bar contains the text 'AND' and another 'All Fields' dropdown. The 'Publication date' section features buttons for '1 Year', '3 Years', '5 Years', and '10 Years', along with a date range selector showing '1/18/2022' to '3/27/2023' and a 'Clear' button. The 'Refine your search' section includes a list of checkboxes: 'Add results beyond your library's collection', 'Full Text Online', 'Include matches in Full Text' (checked), 'Library Catalog', 'Open Access', 'Peer-Review', and 'Physical Books in Library Catalog'. The 'Content Type' section has a search filter and a list of checkboxes: 'Any Type' (checked), 'Architectural Drawing', 'Archival Material', 'Art', 'Article', 'Artifact', and 'Atlas'. The 'Language' section also has a search filter and a list of checkboxes: 'Any Type' (checked), 'Afrikaans', 'Albanian', 'Amharic', 'Aragonese', 'Armenian', and 'Assamese'. At the bottom, there is a 'Fewer search options' link and a 'Selected' indicator showing 'Include matches in Full Text' is checked. A large 'Search' button is located at the very bottom.

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. A search for 'narwhal diet' is active. A dialog box titled 'Save current search and filters' is overlaid, allowing the user to save the search. The dialog includes a 'Search name' field containing 'narwhal diet', a 'Filter by Publication date range' section, and three authentication options: 'Sign in with Google', 'Sign in with Microsoft', and 'Sign in with Campus Login'. A 'Done' button is at the bottom of the dialog. The background shows search refinement options like 'Add results beyond your library's collection' and 'Full Text Online', and a list of content types including 'Journal Article' (20) and 'Newspaper Article' (9).



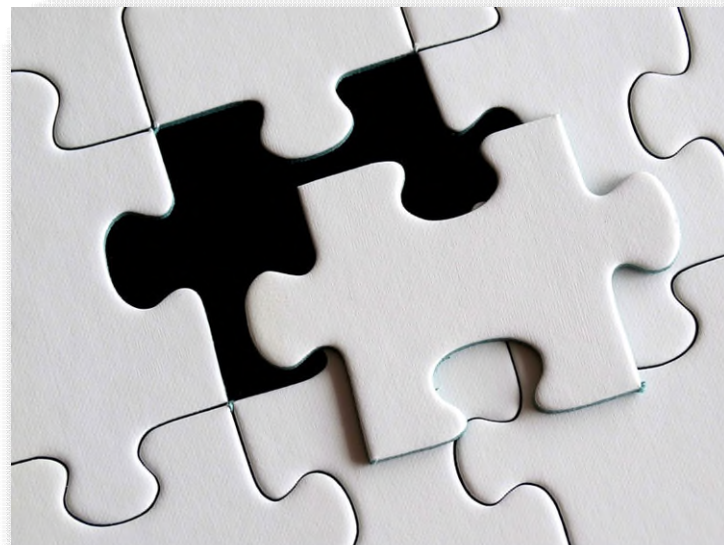
May Release

Production Environment: May 3

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



Support for Google Analytics 4

- Improve reporting by updating Google Analytics to support current version
- Planned for the May release



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 an email composition window titled "Email". It includes a "Send email to:" field, a "Choose a Citation Format:" dropdown menu set to "As shown on search results", and a "Format preview" section. The preview shows a citation for "Analysis of narwhal tusks reveals lifelong feeding ecology and mercury exposure" by Dietz, Rune; Desforges, Jean-Pierre; Rigét, Frank F.; More... from Current biology, 05/2021, Volume 31, Issue 9. Below the preview are buttons for "Direct link to PDF", "Full Text Online", and "More Options". The form also has "From Email:" and "Message:" fields, a reCAPTCHA "I'm not a robot" checkbox, and "Cancel" and "Send" buttons at the bottom.



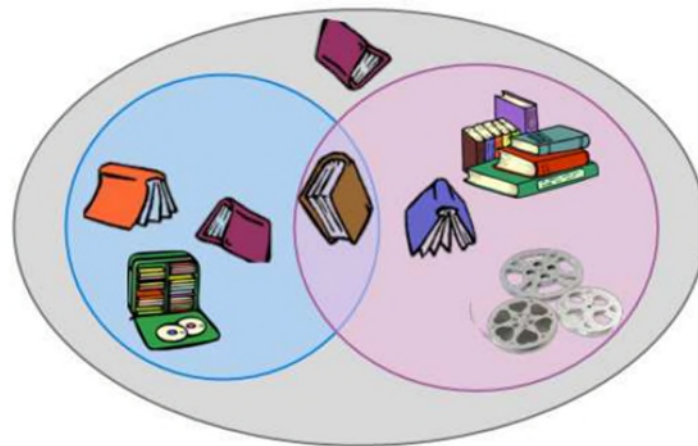


Summon Releases for Second Half of 2023

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

The screenshot displays the 'Axe Library' interface for course reserves. At the top, it shows 'Library Card - Requests' for 'systems@library.pittstate.edu' and 'Pittsburg Public - Pittsburg Public Library'. A sidebar on the left contains navigation links: 'Checked out 2', 'Fines & Fees', 'Requests', 'Reading History', 'Messages', and 'Personal Details'. The main content area features a table of reserves with columns for 'Select all', 'Title', 'Pickup location', and 'Requested on'. Two items are listed: 'Groundhog Day' and 'India divided: diversity and democracy under attack'. Each item has a 'Cancel' button. A 'Sort by' dropdown is set to 'Title'.

Select all	Title	Pickup location	Requested on	
<input type="checkbox"/>	 Groundhog Day by Albert, Trevor; Ramis, Harold, 1944-2014; Rubín, Danny, 1957 ; More...	Axe Library	Nov 17, 2021	<input type="button" value="Cancel"/>
<input type="checkbox"/>	 India divided: diversity and democracy under attack by Shiva, Vandana	Axe Library	Dec 14, 2021	<input type="button" value="Cancel"/>



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 title is 'Fatty acids and stable isotopes ($\delta^{13}C$ and $\delta^{15}N$) reveal temporal changes in narwhal (*Monodon monoceros*) diet...'. The author is 'Watt, Courtney A.; Ferguson, Steven H.'. The article is from 'Marine Mammal Science'. The abstract discusses narwhals as sentinel species in the Arctic and examines their diet using fatty acids, $\delta^{15}N$, and $\delta^{13}C$ from 1982-2011. The article is available in full text online. The right sidebar contains metadata such as 'Subjects' (diet, Fatty acids, Food chains, long-term data, Manne, 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), and 'Web of Science' (28 citations, 1 full text).

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

Quick Look < 1 Of 100 Results >

Fatty acids and stable isotopes ($\delta^{13}\text{C}$ and $\delta^{15}\text{N}$) 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

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

Subjects

- diet
- Fatty acids
- Food chains
- long-term data
- Manne
- 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

NERS



2023 H2

“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 a library search interface. At the top, there's a search bar with the text "lalalalalalalalal" and a search button. Below the search bar, it says "Your search for lalalalalalalalal returned 0 results". To the right of this message, it says "Sorted by relevance". Below the search results, there are several suggestions to improve the search:

- Try including sources outside of the library's collection
- Check your spelling
- Minimize number of search terms
- Contact a librarian for help
- **Include Matches in Full Text**

On the right side of the page, there are links for "Covid-19 Updates", "Remote Access and Help", and "Accessing resources from off-campus".



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

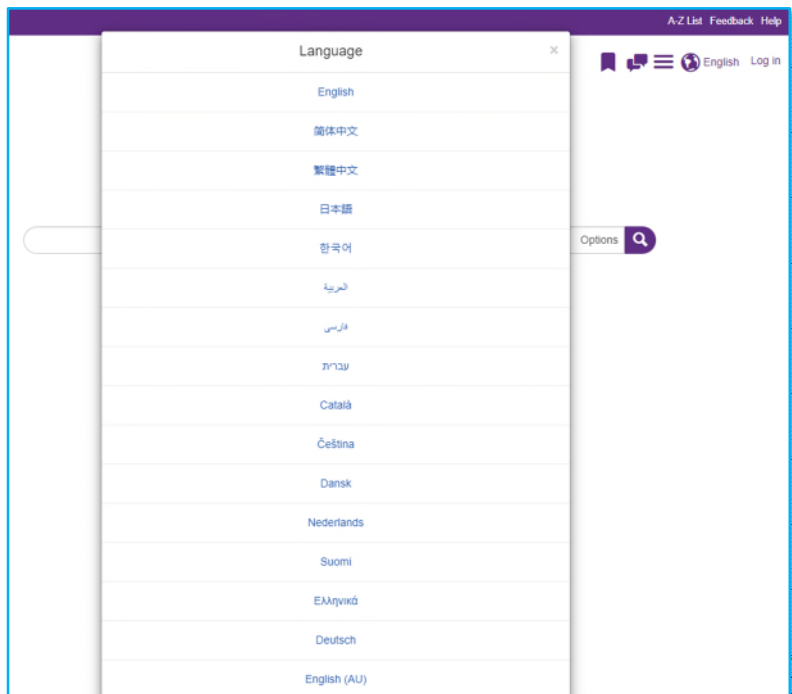
The screenshot displays a 'Database finder' window with a search bar containing the word 'nature'. Below the search bar, it shows 'Showing 1-10 of 1 database results:' followed by the entry for 'American Museum Of Natural History'. The detailed view on the right includes sections for 'Remote Access and Help', 'Accessing resources from off-campus', 'On campus: no log-in required.', 'Off-campus: when opening a database, e-book, or other resource, you'll be prompted to log into the library's proxy server.', 'Need help?', and 'From Wikipedia, the free encyclopedia Physics'.



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



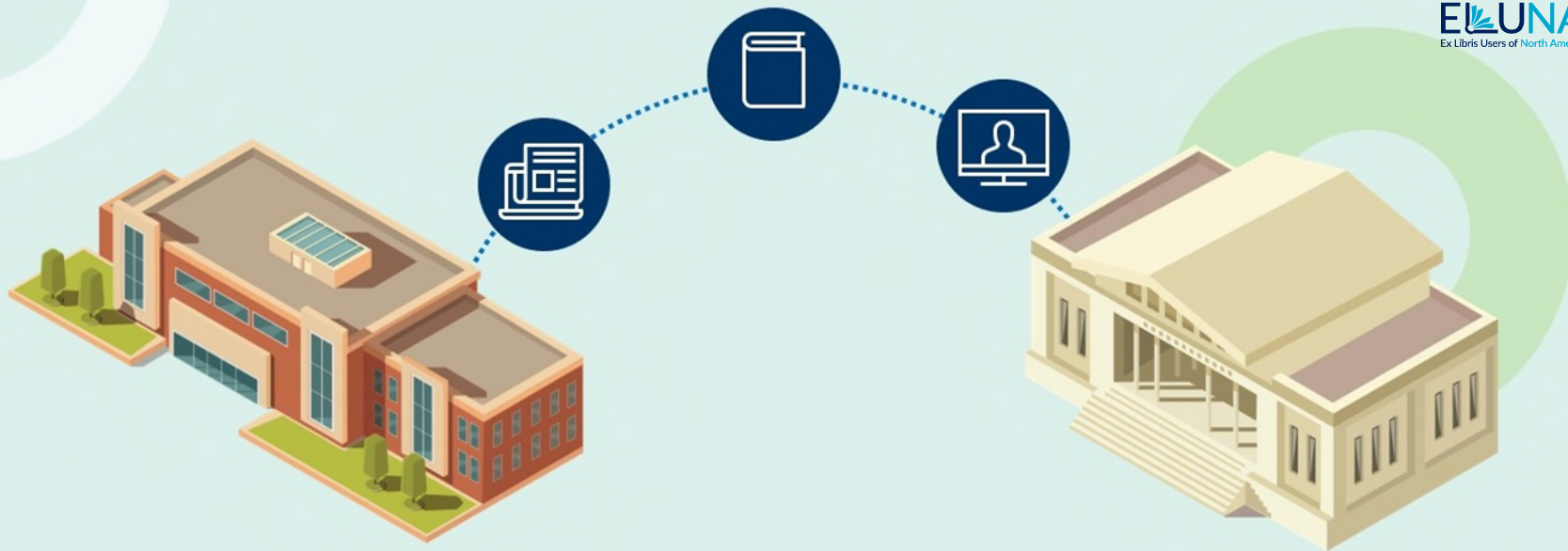
2023 H2

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 35 supported providers
- Over **11,222** collections with **1.56 billion** records
- Linking success rates – 99%

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

ACM Digital Library

Elsevier

ProQuest

SAGE Publications

Springer Nature

Wiley-Blackwell

Bioone

IOP Publishing

National Library of Medicine

New England Journal of Medicine

Emerald

Credo Reference

Thieme

IEEE

Mary Ann Liebert, Inc.

SPIE

University of Chicago Press

Royal Society Publications

Project MUSE

JSTOR

American Institute of Aeronautics and Astronautics

Alexander Street

Taylor & Francis

Brepols Publishers

World Scientific Publishing

Cambridge University Press

American Chemical Society

高等教育出版社 (Higher Education Press)

American Society for Microbiology

INFORMS

Edinburgh University Press

Harmattan

O'Reilly Media, Inc

USPTO

MIT



Your Direct Impact

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

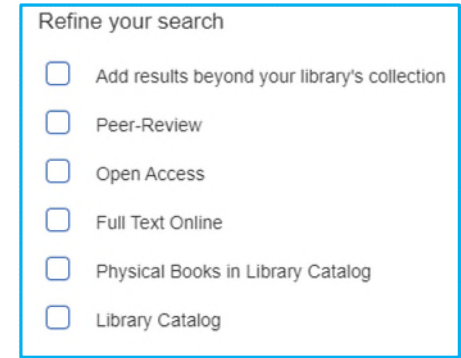
NERS Candidates Completed in 2022

- 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
- Move language dropdown out of the hamburger menu
- 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
- Addressed issue with persistent display of all information on Preview Pane



<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/>



360 and Intota Services

Trusted. Flexible. Open.

2023 Roadmap Highlights

Auto-Holdings
Management
with KBART
Recommended
Practice

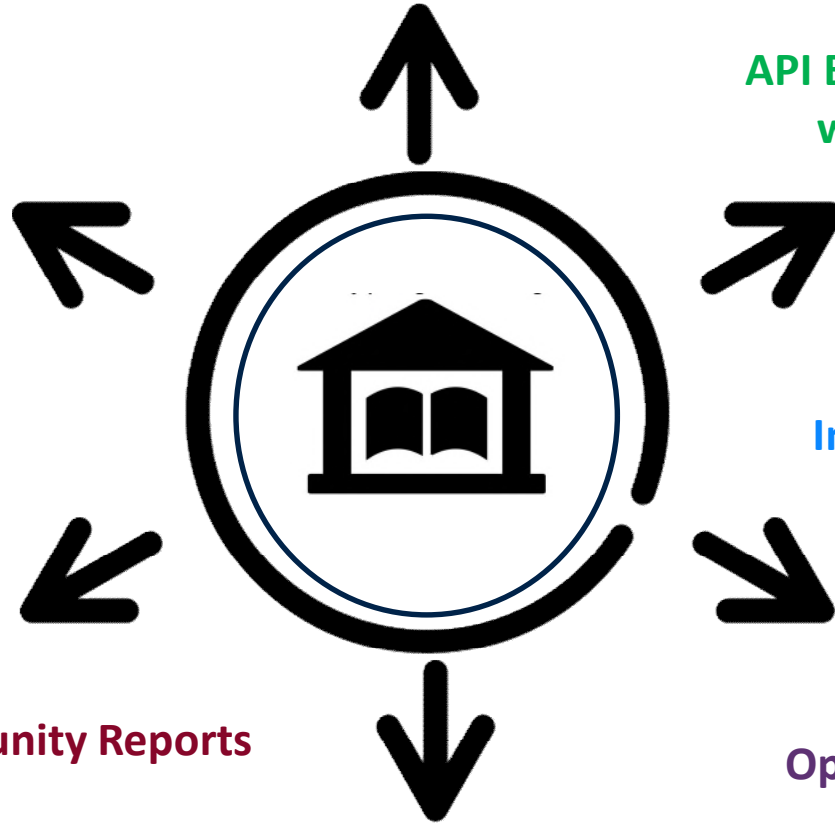
Accessibility

Response to Community Reports

API Expansion for Integration
with External Systems

Infrastructure Investment

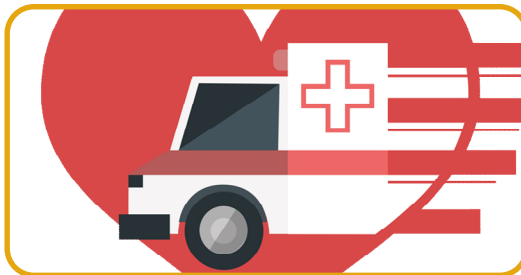
NERS Project
Open Access Indicator



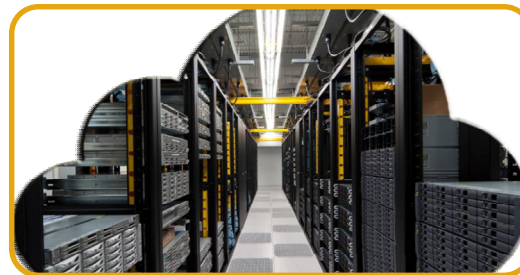
2022 Highlights Review



- Order EJP results by main title string
- Filter the EJP autocomplete suggestions
- MARC record %
- Upload 360 Link DB order list
- KBART file uploads

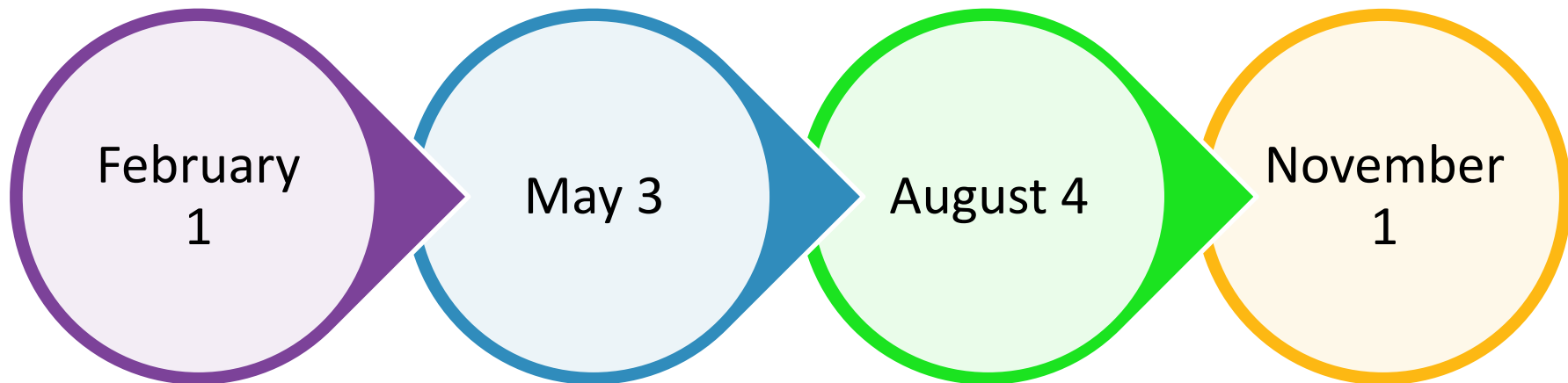


- ~200 customer-reported issues addressed
- Monthly linker releases
- Accessibility improvements
- CDI rights feed improvements
- KB Tools improvements



- Database software migration
- Migration to MFT
- Security enhancements

2023 Quarterly Release Dates



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
- EJP accessibility requests
- SUSHI harvester and consolidation refinements
- Infrastructure

Aug. 3

- Increased autonormalization (Idea Exchange #45253717)
- WCAG A & AA for 360 Link
- 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)

2023 Q1: New COUNTER Report Status

360 Counter

Status	Report	Data	Vendor	Publisher
Deleted				
<input checked="" type="checkbox"/> Reset			Inter-Research	Inter-Research
<input type="checkbox"/> Consolidated			American Heart Association	ahapublisher
<input type="checkbox"/> Pending			American Heart Association	ahapublisher
<input type="checkbox"/> Error			American Psychological Association	American Physiolo
<input checked="" type="checkbox"/> Deleted			JSTOR	Multiple Publishers
			Inter-Research	Inter-Research
			Thieme	Thieme-Verlaa

- Easily see that a report's data was deleted
- Eliminate Support queries
- Understand a report's history

2023 Q1: Reduce Change Records in 360 MARC

- After June database upgrade, there was a sharp increase in the number of changed records for unnormalized titles
- Improved Title and Publisher handling will
 - Stabilize unnormalized record generation in monthly runs
 - Result in fewer changed records
 - Decrease time needed to load MARC files into the ILS

2023 Q1: Additional Improvements

- New linkers for Ebook Central, Nature, and Clinical Ethics.
- Disabled Crossref enrichment for titles when Summon is the referring source.
- Implement database upload capability in Intota
- Implement KBART file upload capability in Intota
- In Consortium Edition: Provider-specific linking parameters (e.g. EBSCO Authorization Settings) will be inherited by member libraries and display in the member library settings.

2023 Q2

- Auto-holdings progress
- Accessibility for 360 Link 2.0
- Java 17 upgrade
- 50+ resolved issues across the suite

Auto-Holdings Infrastructure



Display

Public All Titles Note

Display

Auto Holdings Settings

CRN

Accessibility in 360 Link 2.0

- [360 Link Accessibility Conformance Report](#) (VPAT 2.2 & WCAG)
- Improved performance level to **A** and **AA**

360 /Intota Admin API

- Query API endpoints for:
 - holdings for the given library code and database code
 - providers, databases and holdings for the given library code
 - providers, databases and holdings for the given library code and last update date using pagination
 - providers, databases and holdings for the given library code using pagination
 - databases and holdings for the given library and provider
- More flexible, efficient than Management Reports



Questions?

Thank you!

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