Summon & 360 and Intota Services Update

May 2022
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ELUNA
Ex Libris Users of North America

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- Review Summon 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)

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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

February Release

Production Environment: February 1

Advanced Search: Improve Search Box Layout

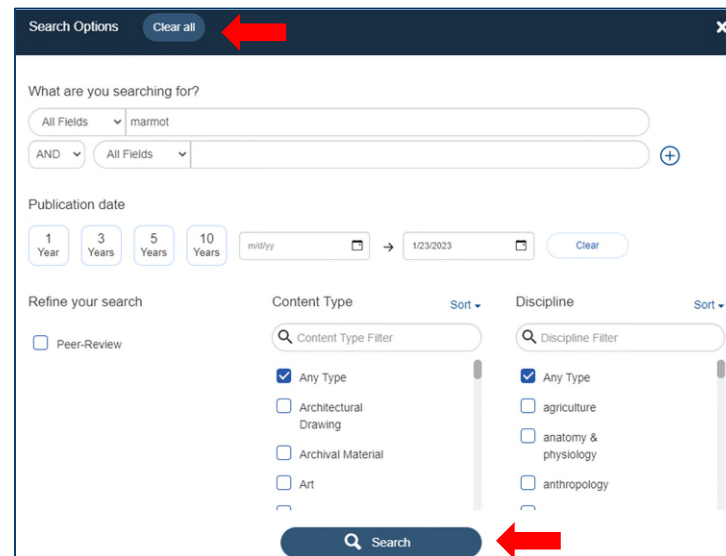Improve search box placement based on feedback

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

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

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

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

May Release

Production Environment: 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

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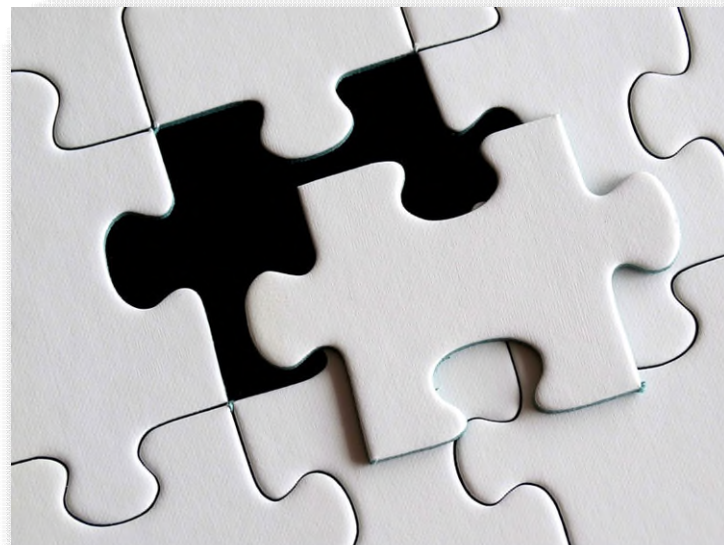
Google Analytics

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

NERS

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Email ✉   ✕

Send email to:

Choose a Citation Format:

As shown on search results

Format preview

Analysis of **narwhal** tusks reveals lifelong feeding ecology and mercury exposure

by Dietz, Rune; Desforges, Jean-Pierre; Rigét, Frank F. ; More...

Current biology, 05/2021, Volume 31, Issue 9

Journal Article   📄 Direct link to PDF   ● Full Text Online   More Options ⌄

From Email:

Message:

☐ I'm not a robot   reCAPTCHA
                      Privacy - Terms

Cancel   **Send**

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

2023 H2
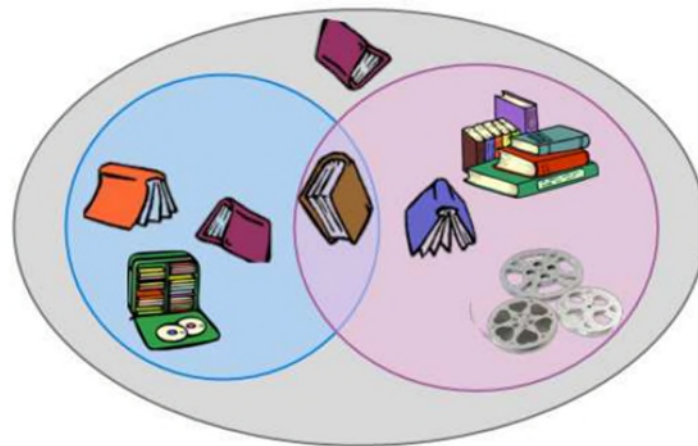
Sierra via Summon: Course Reserves

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

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

NERS

📅 2023 H2

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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

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

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
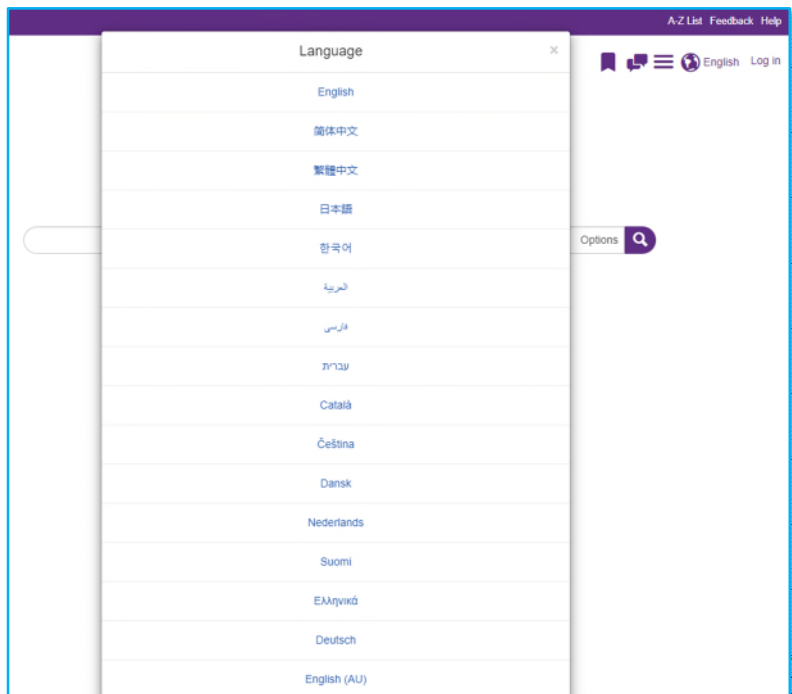
NERS

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

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Ongoing Improvements

Other

Accessibility

Analytics
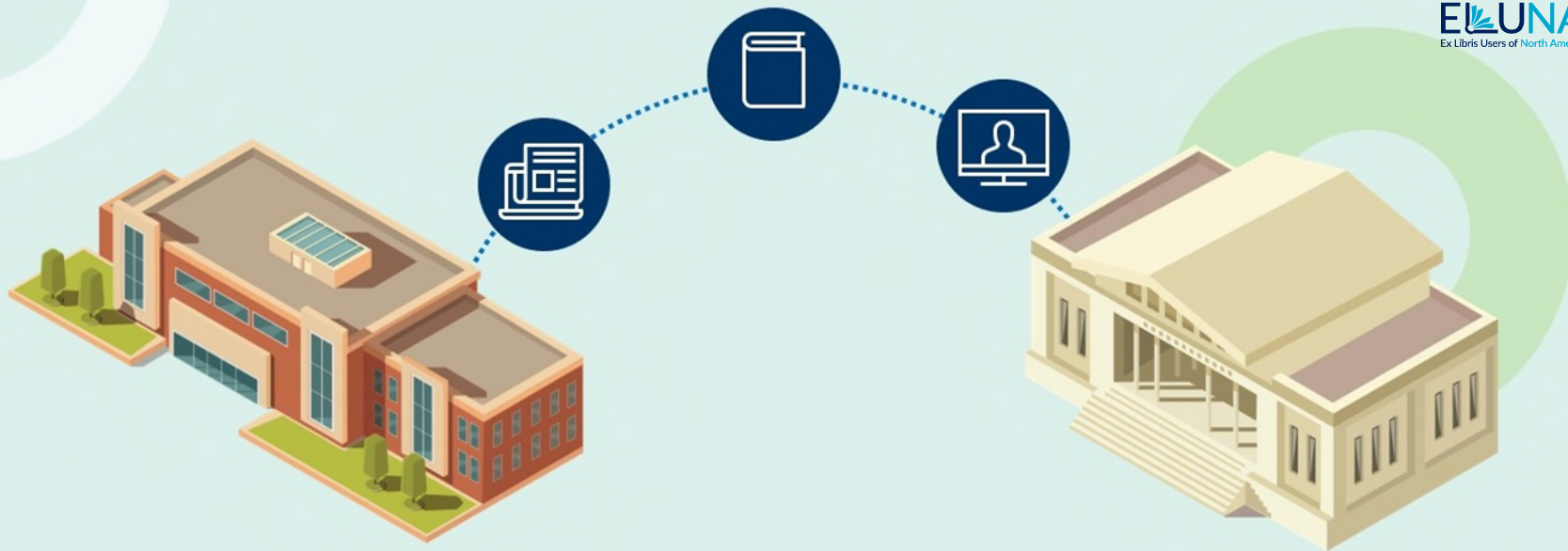
CDI Improvements

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 ORCIDs (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

Quicklinks

- 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/

Refine your search
- ☐ Add results beyond your library's collection
- ☐ Peer-Review
- ☐ Open Access
- ☐ Full Text Online
- ☐ Physical Books in Library Catalog
- ☐ Library Catalog
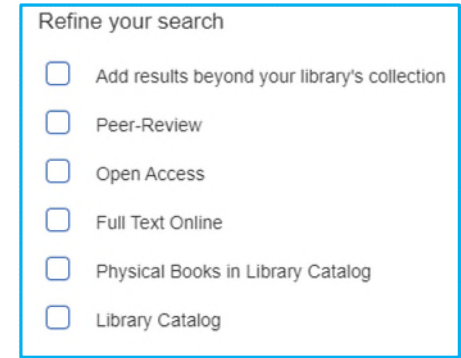
Idea Exchange suggestions completed in 2022

- 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

API Expansion for Integration with External Systems

Accessibility

Infrastructure Investment

Response to Community Reports

NERS Project
Open Access Indicator

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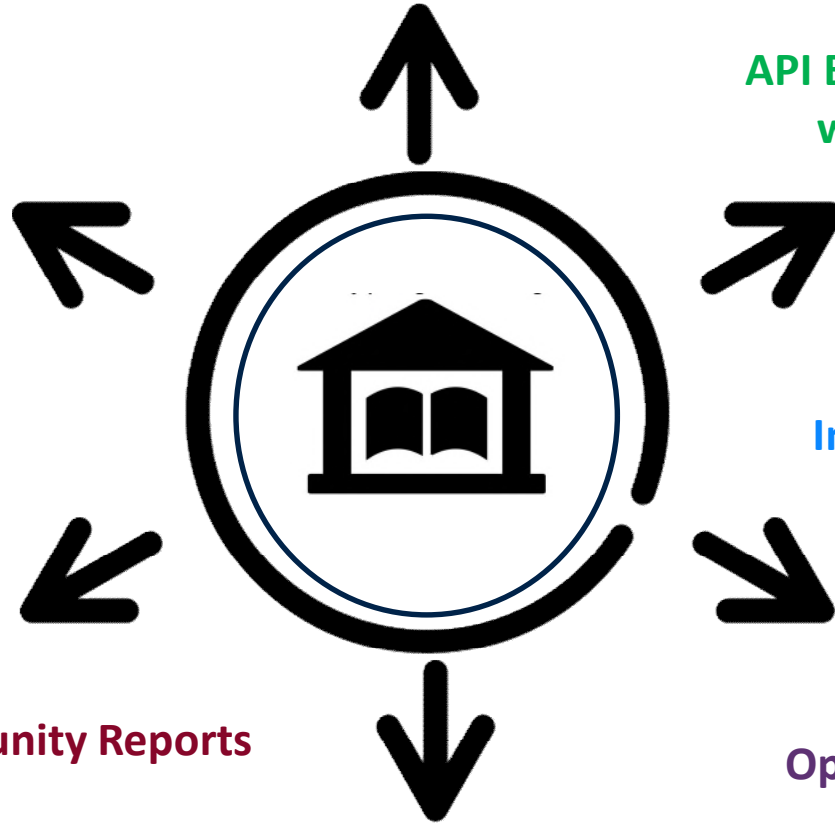
2022 Highlights Review

- Order EJP results by main title string
- Filter the EJP autocomplete suggestions
- MARC record %
- Upload 360 Link DB order list
- KBART file uploads
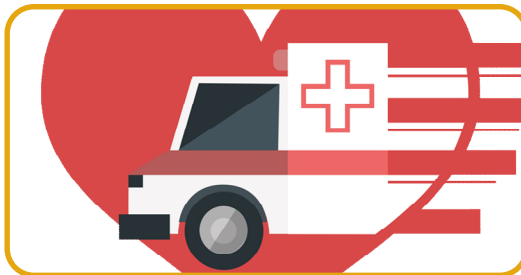
- ~200 customer-reported issues addressed
- Monthly linker releases
- Accessibility improvements
- CDI rights feed improvements
- KB Tools improvements
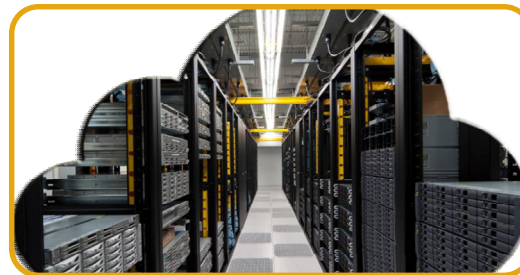
- Database software migration
- Migration to MFT
- Security enhancements

2023 Quarterly Release Dates

February 1 → May 3 → August 4 → November 1
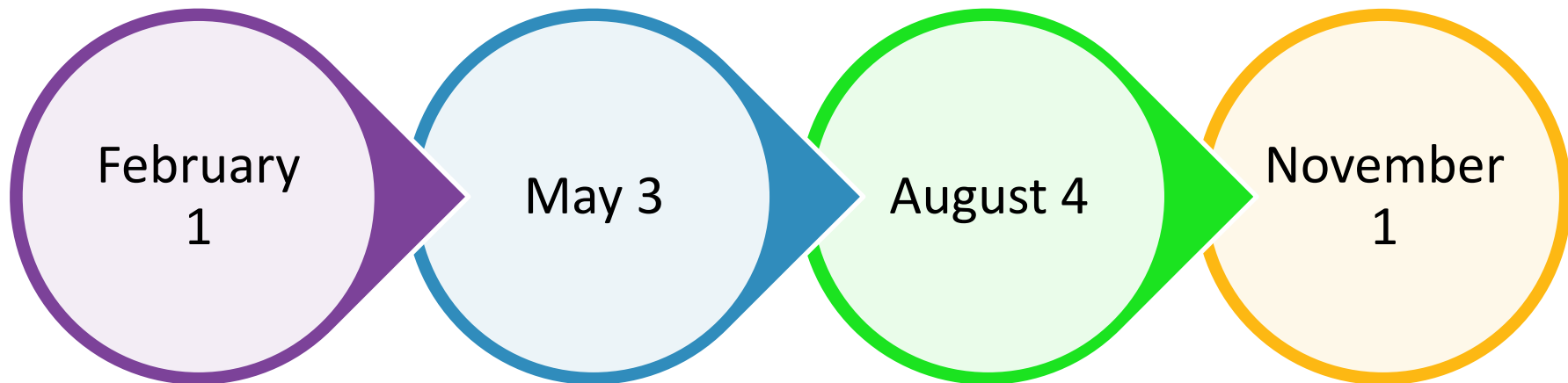
Delivery Targets

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**)

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2023 Q1: New COUNTER Report Status

- 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.

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2023 Q2

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

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Auto-Holdings Infrastructure

Accessibility in 360 Link 2.0

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

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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

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Questions?

Thank you!

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