



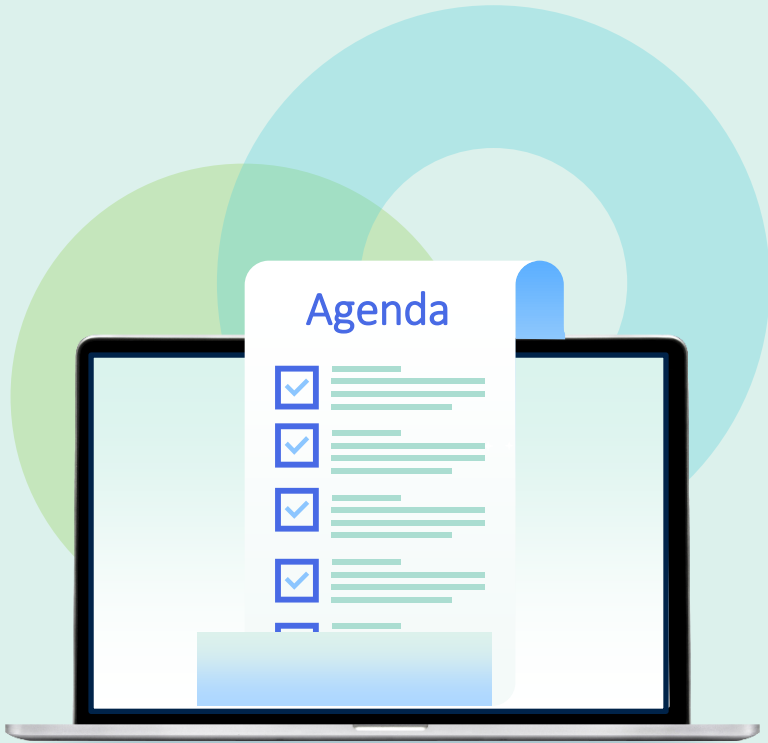
What's New with Summon & 360/Intota Services



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Intota & 360 Services



- Summon
 - Recent Accomplishments
 - August Release
 - Roadmap for Remainder 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)

- Data Quality Improvements
- Ongoing Analytics
- Accessibility



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)



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

The screenshot displays the 'Search Options' overlay in a dark purple theme. At the top, there's a 'Clear all' button. Below is a search input field with a placeholder 'What are you searching for?'. Underneath the input field are two dropdown menus: 'All Fields' and 'AND'. Below these are 'Publication date' filters with buttons for '1 Year', '3 Years', '5 Years', and '10 Years', along with a date range selector showing 'mid/yyyy' to '3/27/2023' and a 'Clear' button. The 'Refine your search' section includes checkboxes for '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 options: 'Any Type' (checked), 'Architectural Drawing', 'Archival Material', 'Art', 'Article', 'Artifact', and 'Atlas'. The 'Language' section has a search filter and a list of options: 'Any Type' (checked), 'Afrikaans', 'Albanian', 'Amharic', 'Aragonese', 'Armenian', and 'Assamese'. At the bottom, there's a 'Fewer search options' link and a 'Selected' indicator showing 'Include matches in Full Text' with a close icon. A large 'Search' button is 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. At the top, the search bar contains the text 'narwhal diet'. A modal window is overlaid on the search results, titled 'Save current search and filters'. The modal includes a 'Search name' field with 'narwhal diet' entered, a 'Filter by Publication date range' section, and three login options: 'Sign in with Google', 'Sign in with Microsoft', and 'Sign in with Campus Login'. A 'Done' button is located at the bottom of the modal. The background shows search results for 'narwhal diet', including a 'Journal Article' with 'Full Text Online' and 'View Now' options.

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

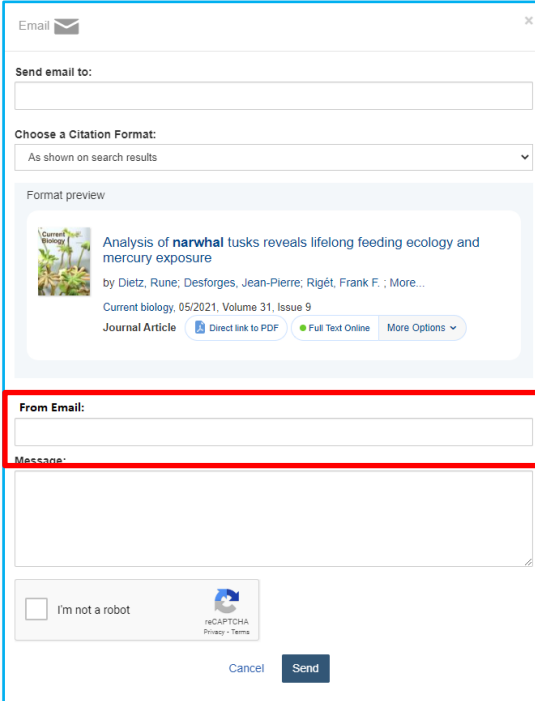
(Quick Look)

<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:' field, a 'Choose a Citation Format:' dropdown menu set to 'As shown on search results', and a 'Format preview' section displaying a citation for 'Analysis of narwhal tusks reveals lifelong feeding ecology and mercury exposure'. The 'From Email:' field is highlighted with a red border, indicating it is a mandatory field. Below the 'From Email:' field is a 'Message:' text area. At the bottom, there is a 'I'm not a robot' checkbox, a reCAPTCHA widget, and 'Cancel' and 'Send' buttons.

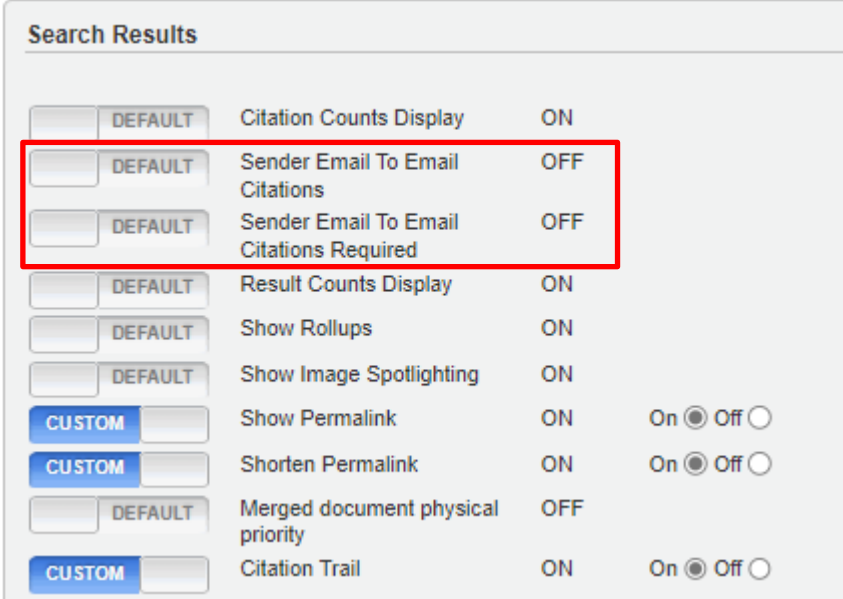
NERS



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"/>



August Release

Preview starting July 19

Live in Production August 2

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
- Limit by Content Type, Discipline, Language, New Records, and Time Period
- Add or remove resources by ISBN/ISSN to a search scope
- Add library locations to a search scope

The screenshot shows the Summon search interface. At the top, there is a search bar with the text 'marmot' and a dropdown menu labeled 'Collections to search for' with 'All' selected. The dropdown menu lists several collection types: All, Medical Journals, Special Library Section, Local Collections, School of Music, Targeted Legal Collections, and Dissertations and Theses. Below the search bar, there are search results for 'marmot'. The first result is a book titled 'Marmots' by Arnold, Walter, from 'Current biology', 08/2019, Volume 29, Issue 16. The second result is a journal article titled 'Marmots' by Walter Arnold, introducing the biology of marmots. The interface also includes a 'Refine your search' section with various filters like 'Add results beyond your library's collection', 'Peer-Review', 'Open Access', 'Physical Books in Library Catalog', 'Full Text Online', 'Library Catalog', and 'Include matches in Full Text' (which is checked).

Scopes for Summon Searches

How to Configure Search Scopes for Summon

- Controls for Search Scopes is found in the Admin Console under Settings > Search Scopes
- Existing Scopes will appear at the top and can be enabled, disabled, edited, or deleted

The screenshot displays the Summon Editor Admin Console interface. The top navigation bar includes 'SETTINGS', 'MAPPING', 'PAGES', 'USAGE', 'TRANSLATIONS', 'RECOMMENDER', and 'CONTENT IN'. The main content area is titled 'Settings' and features a left-hand sidebar with various configuration categories: General, Search Results, Quick Look, Logos, Subject Terms, Authentication, Facets, Networks, Syndetics, Languages, Participant Record Prioritization, Citation Formats, Advanced Search, Refine Your Search, Search Scopes (highlighted), and Custom Link. The 'Search Scopes' panel is open, showing a list of search scopes. Each scope has a toggle switch to enable or disable it, and buttons for 'Edit' and 'Delete'. The scopes listed are: 'All' (Enabled), 'Ford + library' (Enabled), 'Architecture' (Enabled), 'issn' (Enabled), 'issn open access physics disciplin' (Enabled), and 'subj humans author wang wei database medicine' (Enabled). There is also an 'Add new search scope' button at the bottom of the list. At the bottom right of the panel, there are 'Save Settings' and 'Reset Form' buttons.



Scopes for Summon Searches

How to Configure Search Scopes for Summon

- To create a new Scope, click on the Add New Search Scope button at the bottom
- A form similar to the advanced search form will appear
- Fill out the Name (which will display in the Scope Dropdown on the search page) and Description (for your internal use)
- Complete the form and save to create a new scope

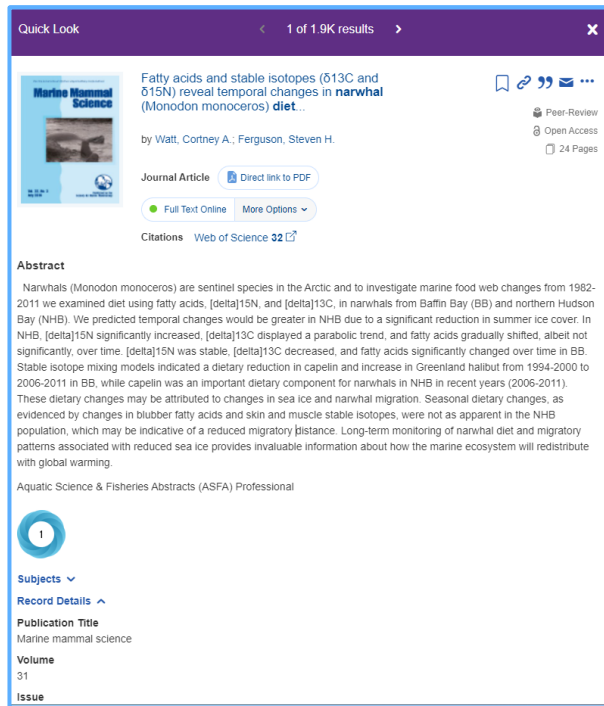
The screenshot shows the configuration interface for a new search scope. On the left is a sidebar menu with options: Participant Record Prioritization, Citation Formats, Advanced Search, Refine Your Search, Search Scopes (highlighted), Custom Link, Topics, Resource Link Prioritization, A&I Detail Page, Transliteration (880 Fields), Configuration (read only), Chat, Summon 2.0 Configuration, Summon 2.0 Customization, Summon 2.0 External Script, Altmetrics, Web of Science - Free View, bX Recommender - Related Articles, Custom Sections, and SAML. The main form has fields for Name, Description, and Scope Query, with Save and Cancel buttons. Below is a Search Options panel with a search bar containing 'ISSN', a Publication date field set to 'm/d/yyyy' with a date picker showing '7/17/2023', and a Refine your search section with checkboxes for 'Add results beyond your library's collection', 'Full Text Online', 'Include matches in Full Text' (checked), 'Library Catalog', 'Open Access', and 'Peer-Review'. There are also filters for Content Type (Any Type checked) and Discipline (No results found).



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' pane for a journal article. At the top, it indicates '1 of 1.9K results'. The article 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.'. There are buttons for 'Journal Article', 'Direct link to PDF', 'Full Text Online', and 'More Options'. The abstract text is visible below, starting with 'Narwhals (Monodon monoceros) are sentinel species in the Arctic...'. At the bottom, there is a 'Subjects' dropdown, 'Record Details', 'Publication Title' (Marine mammal science), 'Volume' (31), and 'Issue'.

NERS

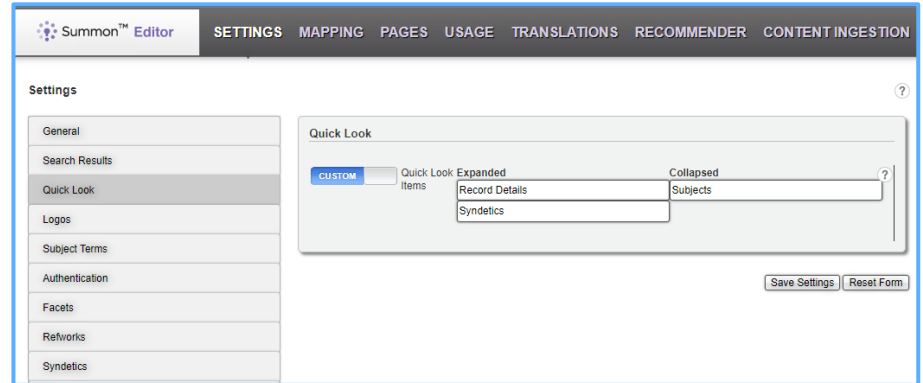


2023 Q3

Improve the Quick Look Pane Layout

How to Configure The Quick Look Pane

- You can manage some aspects of the Quick Look pane in the Admin Console, under Settings > Quick Look
- Set which elements are expanded or collapsed by default by dragging and dropping the Quick Look element into the appropriate column
- Be sure to save your settings



NERS

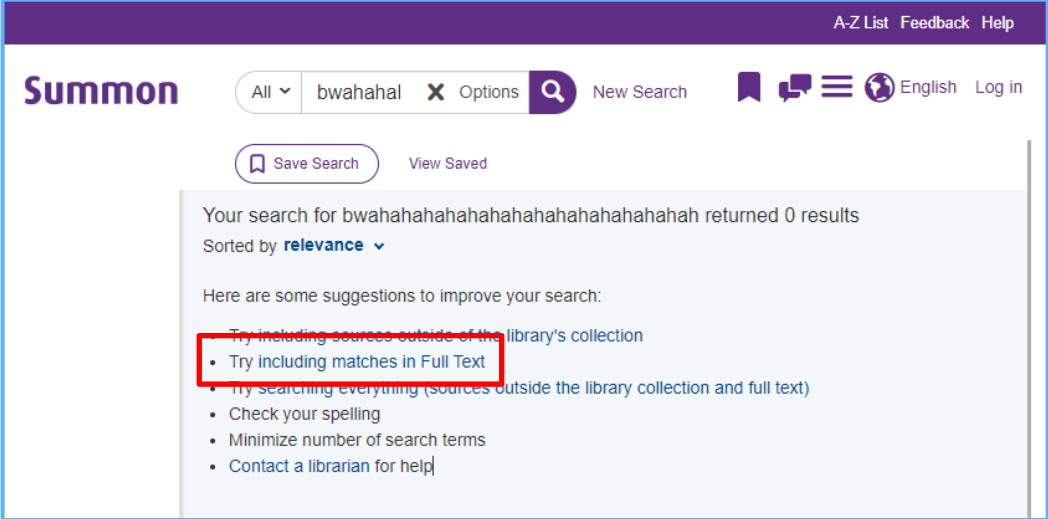


2023 Q3

“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
- Option will appear automatically if Include Matches in Full Text is set to on and the search does not already include Full Text facet



The screenshot shows the Summon search interface. At the top right, there are links for "A-Z List", "Feedback", and "Help". The search bar contains the text "bwahahal" and "Options" with a search icon. Below the search bar, there are buttons for "Save Search" and "View Saved". The main content area displays the message: "Your search for bwahahahahahahahahahahahahahahah returned 0 results. Sorted by **relevance**". Below this, it says "Here are some suggestions to improve your search:" followed by a list of suggestions. The suggestion "Try including matches in Full Text" is highlighted with a red box.

Try including sources outside of the library's collection

- Try including matches in Full Text
- Try searching everything (sources outside the library collection and full text)
- Check your spelling
- Minimize number of search terms
- Contact a librarian for help

NERS



2023 Q3

“Include Matches in Full Text” to Search Suggestions

Appearance on Zero Results page is contextual

- Will only appear if Including Matches in Full Text is an option under Refine Your Search and the search doesn't already have it applied

Selected Clear all

humans x

Refine your search <

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



2023 Q3

NERS



“Include Matches in Full Text” to Search Suggestions

How to Configure

- Include Matches Full Text Default should be set to On
- The Include Matches Full Text Override facet should be enabled
- The link will appear on the Zero Results Page only if the facet isn't already applied

Refine Your Search

CUSTOM Refine Search Selection

Enabled	Disabled
<input type="checkbox"/> Add Results Beyond Catalog	<input type="checkbox"/> Limit To Scholarly
<input type="checkbox"/> Limit To Peer Reviewed	<input type="checkbox"/> Items At My Institution
<input type="checkbox"/> Open Access	<input type="checkbox"/> eBooks Filter
<input type="checkbox"/> Physical Books Filter	
<input type="checkbox"/> Full Text Online	
<input checked="" type="checkbox"/> Include Matches Full Text Override	
<input type="checkbox"/> Items in Catalog	

CUSTOM

<input checked="" type="checkbox"/> Include Matches Full Text Default	ON	On <input checked="" type="radio"/> Off <input type="radio"/>	?
Physical Books - Backend Processing	ON	On <input checked="" type="radio"/> Off <input type="radio"/>	?

Save Settings Reset Form



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 website interface. On the left, there are sections for 'Off-campus' access instructions, 'Need help?' with contact information, and a 'Suggested Librarian' profile for Morgan Pruitt. Below these are 'Related Topics' including Biophysics, Molecular biology, and Synthetic biology. On the right, a 'Database finder' widget is shown with a search bar containing the word 'nature'. Below the search bar, it indicates 'Showing 1-10 of 1 database results:' and lists the 'American Museum Of Natural History' database. The description for this database includes details about its collections, exhibits, and metadata such as 'Time Period', 'Sources', 'Subject Headings', 'Scholarly or Popular', 'Primary Materials', 'Information Included', 'FindIt@BALL STATE', 'Print Equivalent', 'Publisher', 'Updates', and 'Number of Simultaneous Users'.

NERS



2023 Q3

Ability to Customize of Elements in the Right Pane

How to Configure Order of Elements

- Controls for the order of elements in the right pane can be found in the Admin Console, under Settings > Custom Sections
- In addition to the ability to configure the appearance of the More link and number of sections displayed before the link, you can now enable, disable and determine the order of the major elements

Custom Sections

<input type="checkbox"/> DEFAULT	Show 'More' enabled	ON	?
<input type="checkbox"/> DEFAULT	Default sections displayed	3	?
<input type="checkbox"/> DEFAULT	Display Order	Enabled	Disabled

Enabled

- Springshare A-Z Database Finder
- Custom Panel Section
- Topic Explorer

Save Settings | Reset Form



Ability to Customize of Elements in the Right Pane

How to Configure Database Finder

- In the Admin Console, under Recommender > Springshare, in the section A-Z Database Settings
- You can now determine the number of results returned

A-Z Database settings

The A-Z Database service requires an active subscription. To be able to show the widget, Springshare API details are needed. See [Springshare help page](#) for more details.

After providing the API details, it might take up to two days before the databases are searchable from the Summon database search widget. Use the testing tool at the bottom of this page to see if there are any results for your API key. When you find there are search results, you can enable the widget below.

Enable A-Z database search for every Summon query On Off

Set default number of results displayed

API URL

Client ID

Client secret key

AZ Widget Browse URL
Optional. If provided, the widget will display a line with the following text, including this URL: "Or 'click here' to browse by subject". When left empty, this line will not show.

AZ Widget Proxy URL
Optional. If provided, database URLs that have 'enable_proxy' configured, will be prefixed by the contents of this field. Make sure it includes '?uri=' (or equivalent for your proxy solution), so the proxied URL will look like 'https://myproxy.institution.com/?uri=https://database.com/id/12345'.

First verify the SpringShare credentials.

Save the provided credentials for future use.

NERS

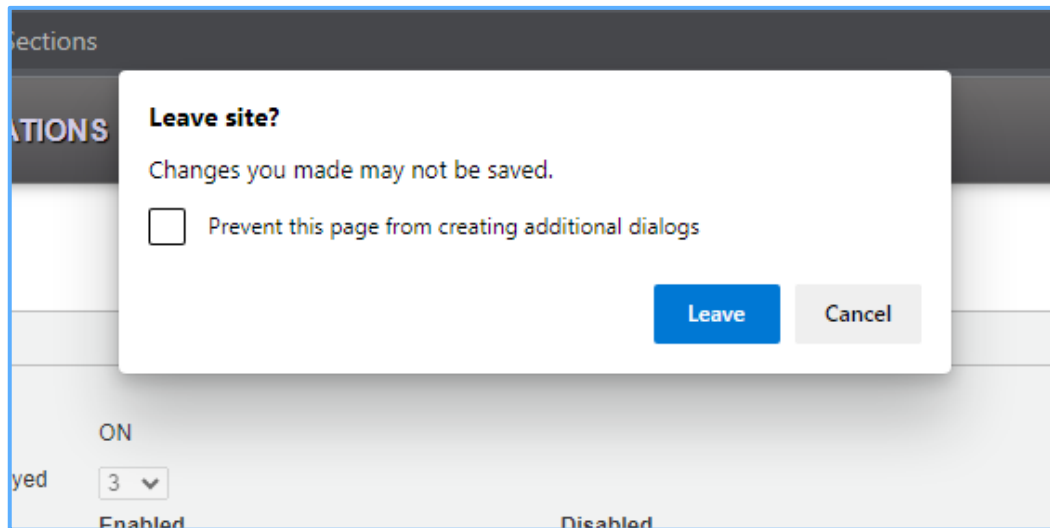


2023 Q3

Warning to Save Changes

New Dialog Notifies You of Changes Not Saved

- If you make changes on an Admin Console page and navigate away before saving, you'll now get a warning that prompts you to save before leaving



2023 Q3



Summon 2023 Roadmap—Upcoming Features

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

Marine Mammal Science
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

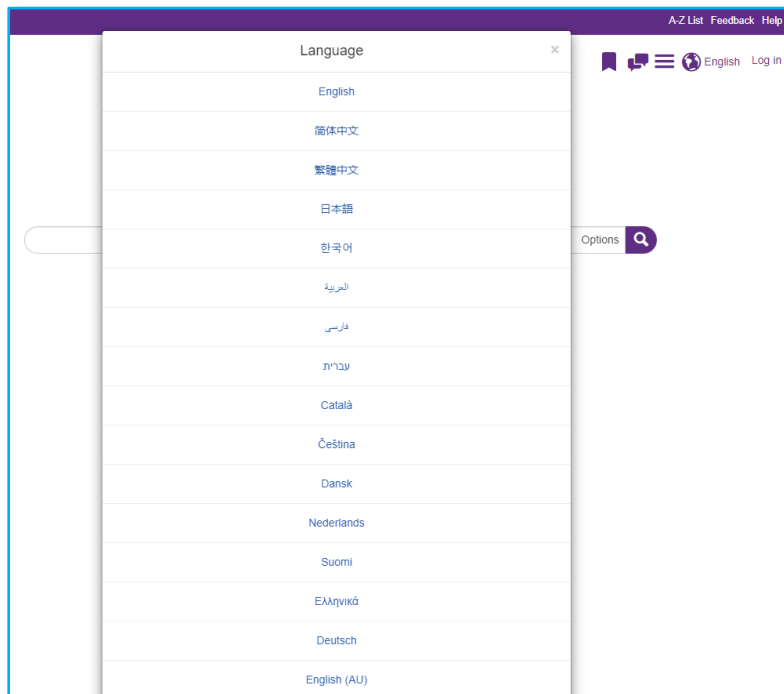
WEB OF SCIENCE 28

1

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



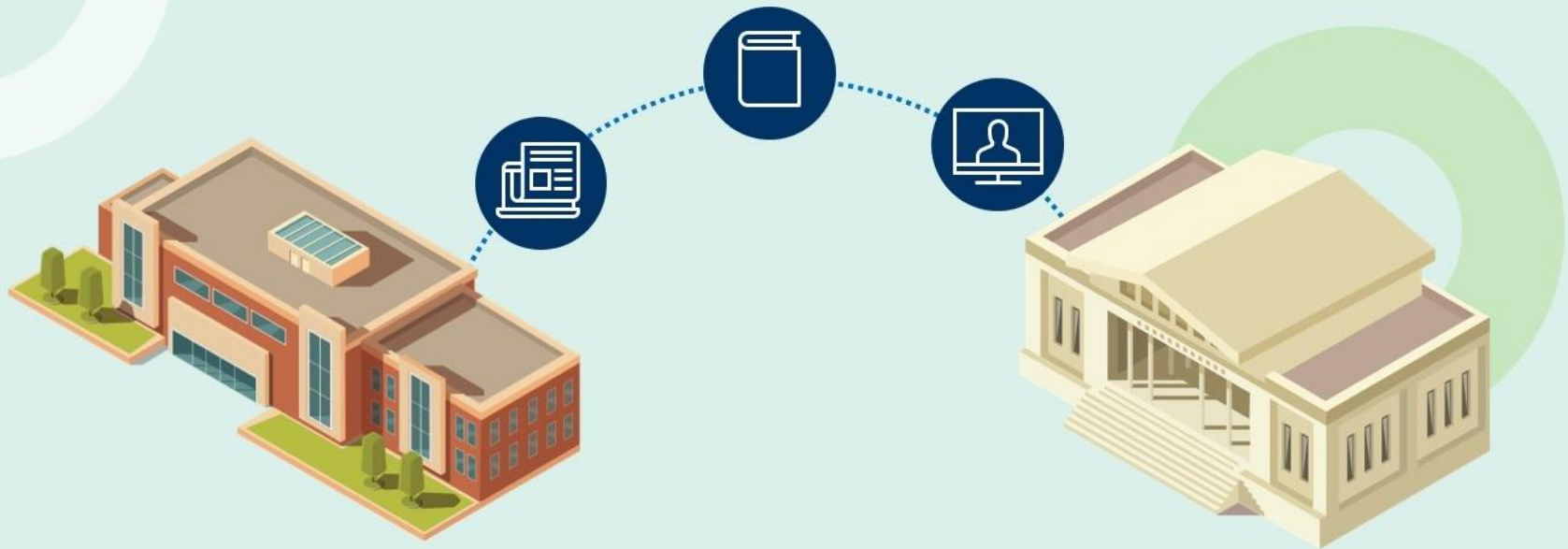
2023 H2

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)
ADL 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://www.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 Science	Content under https://www.chico-science.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.rosociety.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 Astronomical	Journals, Standards, Proceedings, Books under https://www.aip.org/	Journals, Standards, Proceedings (PDF/HTML) Books (HTML)
Anderson Science	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
INFORMA	All	PDF/HTML
Elsevier University Press	Journals under https://www.elsevier.com/	PDF/HTML
Palmerston	Books	HTML
O'Brien Health, 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: The Ideas Exchange Edition

2023 Roadmap Highlights

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

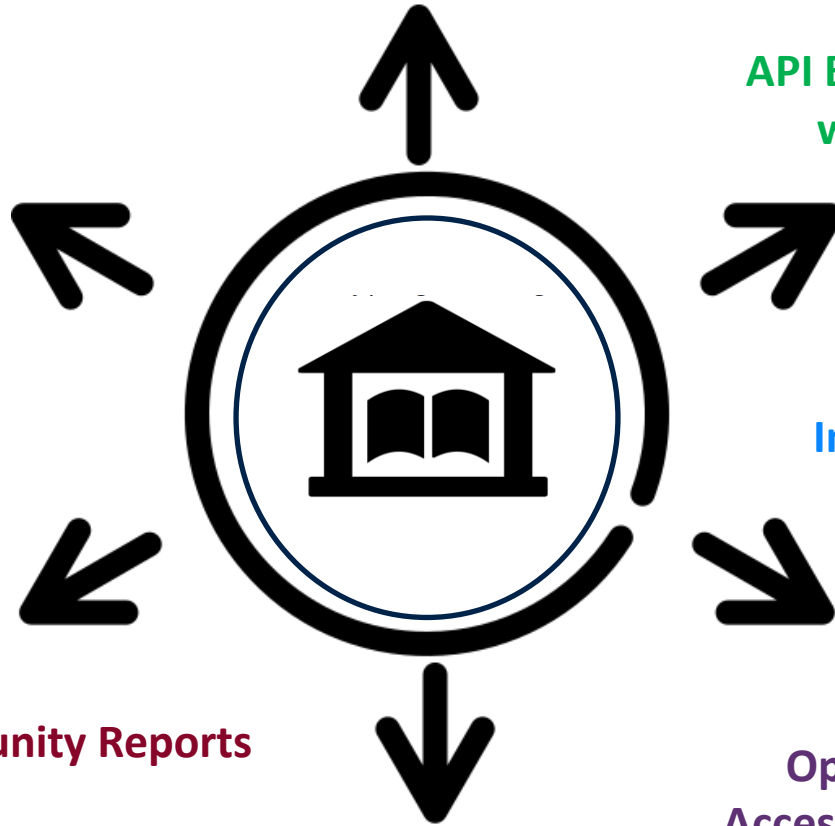
Accessibility

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



Q3: Ideas Exchange

- Auto-Holdings Management with Taylor & Francis is live!
-  Open Access indicators for databases and titles
- Add non-admin permission and link to Summon Analytics in 360 Client Center and Intota



Ebook Auto-Holdings for Taylor & Francis

- Beginning August 2 you will be able to configure auto-holdings management for **Taylor & Francis eBooks A-Z (JTX)**
- Weekly updates – Saturday/Sunday
- Ex Libris calls a T&F API endpoint and retrieves a KBART-formatted file of your holdings



360 Configuration: Database Details

Display

Public All Titles Note

Display

Auto Holdings Settings

CRN

Intota Configuration: Database Details

About * Required Field Cancel Save

Database Name *

Provider Name [Taylor & Francis](#)

Status ▼

OA Coverage 0 %

MARC Coverage 85 %

Title Coverage ONLY SELECTED titles ALL titles

Database Description

Long Database Description

Automate Holdings Automatic Manual

CRN


Open Access Indicators for Databases and Titles


- Quickly and easily identify Open Access resources in the 360 KB!
 - Open Access coverage % displays in search results and Data Management (360) or Databases list (Intota)
 - Open Access coverage % displays on the database details page
 - Open Access indicator displays on the titles list and at the individual title level
- Ulrich's is the information source

NERS



Open Access Integration in Intota

Agricultural Science Database  Database
1009 titles

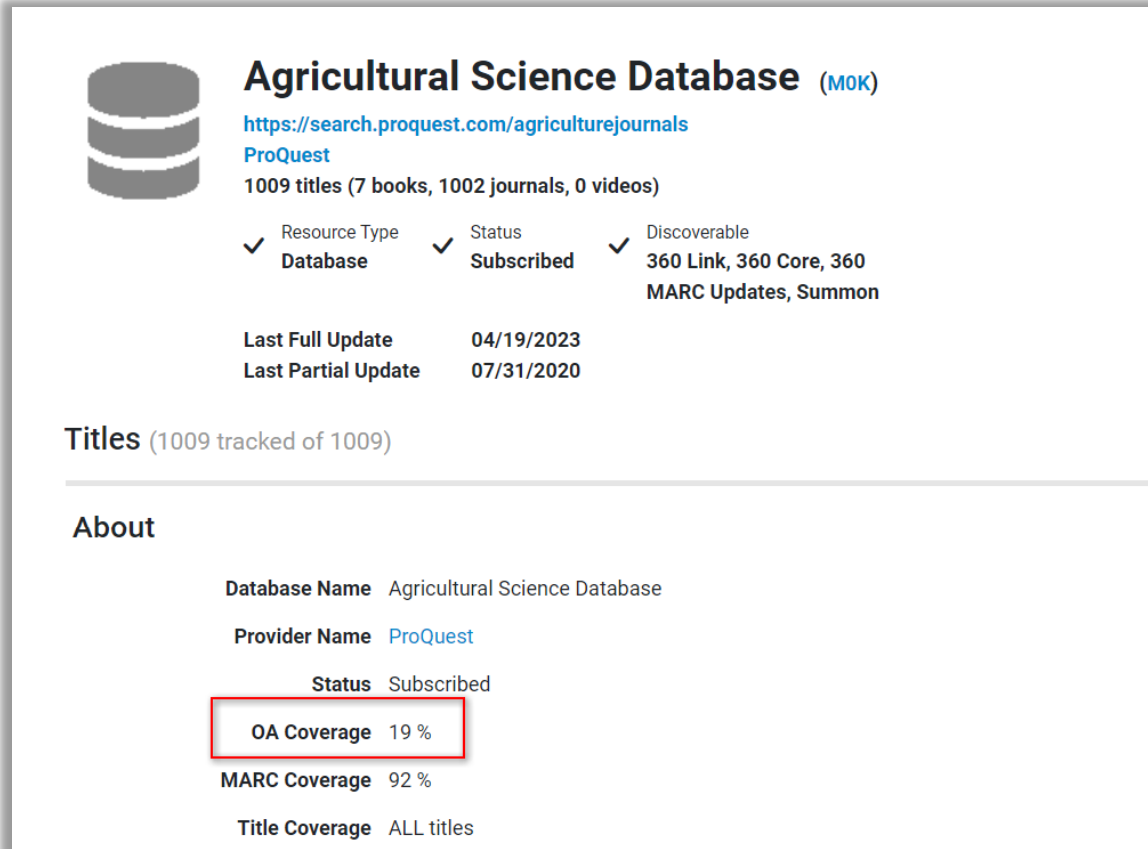
 Subscribed - ProQuest - MOK


OA Coverage 19 %

MARC Coverage 92 %

- Percentage of titles in database that are marked OA
- Search results
- Subscribed databases list

Open Access Integration in Intota



 **Agricultural Science Database** (MOK)

<https://search.proquest.com/agriculturejournals>
ProQuest

1009 titles (7 books, 1002 journals, 0 videos)

✓ Resource Type Database ✓ Status Subscribed ✓ Discoverable 360 Link, 360 Core, 360 MARC Updates, Summon

Last Full Update 04/19/2023
Last Partial Update 07/31/2020

Titles (1009 tracked of 1009)

About

Database Name Agricultural Science Database

Provider Name ProQuest

Status Subscribed

OA Coverage 19 %


MARC Coverage 92 %

Title Coverage ALL titles

Open Access Integration in Intota

Title ▾	Identifier	Type	Status	Date(s)	Custom Date	OA ▾	Collection	More
ACTA AGRICULTURAE SLOVENICA	1581-9175	eJournal	Subscribed	08/01/2007 to 12/31/2013		Yes		View Details
Acta Agronómica	0120-2812	eJournal	Subscribed	01/01/2004 to present		Yes		View Details
Acta biológica colombiana	0120-548X	eJournal	Subscribed	01/01/2004 to present		Yes		View Details
Acta biologica Cracoviensia	0001-5296	eJournal	Subscribed	01/01/2010 to present		Yes		View Details
ACTA BOTANICA CROATICA	0365-0588	eJournal	Subscribed	01/01/2011 to 07/31/2019		Yes		View Details
Acta Facultatis Xylogologiae Zvolen res Publica Slovaca	1336-3824	eJournal	Subscribed	07/01/2013 to present				View Details
Acta Scientiarum Polonorum. Formatio Circumiectus	1644-0765	eJournal	Subscribed	01/01/2014 to 01/31/2018		Yes		View Details
Acta Scientiarum. Agronomy	1679-9275	eJournal	Subscribed	01/01/2015 to present		Yes		View Details
Acta scientiarum. Animal sciences	1806-2636	eJournal	Subscribed	01/01/2015 to present		Yes		View Details
ADVANCES IN ANIMAL BIOSCIENCES	2040-4700	eJournal	Subscribed	04/01/2010 to 04/30/2020				View Details

Open Access Integration in Intota



Acta Agronómica

Alt. Title: Acta agronomica
Found in: [Agricultural Science Database](#) by [ProQuest](#)
Date(s): 01/01/2004 to present
<https://search.proquest.com/publication/2035751>

✓ Resource Type: **Ejournal** ✓ Holding Status: **Subscribed** ✓ Discoverable: **360 Link, 360 Core, 360 MARC Updates, Summon**

Holding Details

Database Name [Agricultural Science Database](#)
Provider Name [ProQuest](#)
Status [Subscribed](#)
OA [Yes](#)
Coverage Dates from 01/01/2004 to Present

Non-admin Link to Summon Analytics

- Assign independent permission to users so they can access only Summon Analytics directly from 360

The screenshot displays the 360 system configuration interface. On the left, a navigation menu includes 'Account Details', 'General', 'Permissions', '360 Core Permissions', '360 Resource Manager Permissions', and 'Email Notices'. The main area lists various system settings:

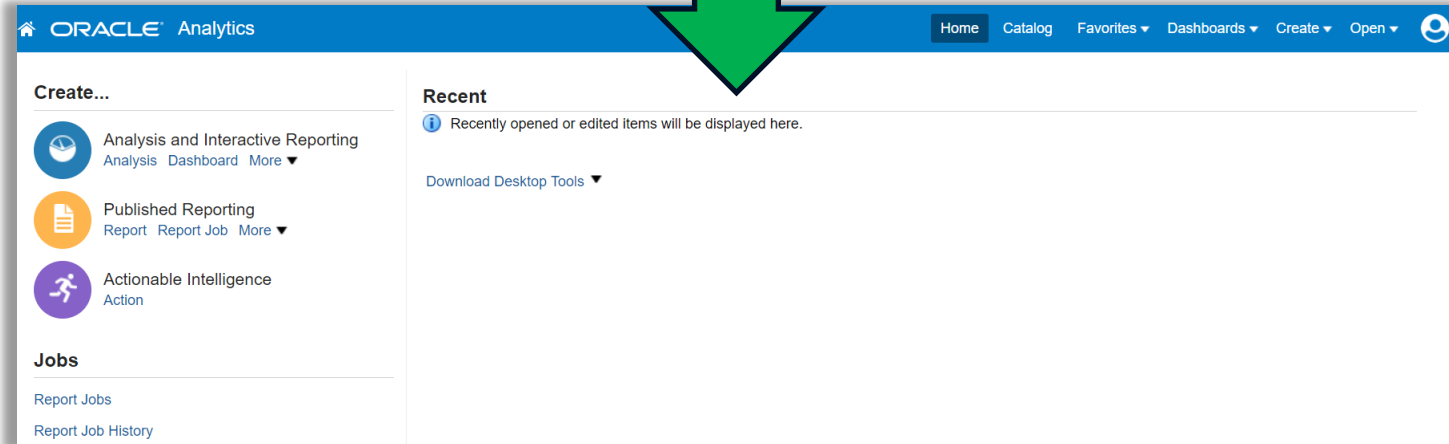
- Statistics Tools** View
- 360 Link Customization** View/Edit
- Data Management** View/Edit
- Data On Demand** View/Edit
- Date Format** View/Edit
- E-Journal Portal Customization** View/Edit
- Summon Customization** None
- Summon Usage Statistics** View/Edit
- Library Accounts** View/Edit
- Library Information** View/Edit
- Local Holdings Management** View/Edit
- 360 Search Customization** View/Edit
- Knowledgebase Notifications** View/Edit
- Display Full Details In View Changes** View/Edit

Non-admin Link to Summon Analytics

Business Intelligence Tools

360 Usage Statistics
Overlap Analysis
Data On Demand
Management Reports
Intota Assessment

COUNTER Configuration
Ulrichsweb Usage Statistics - New Platform
Ulrichsweb Usage Statistics
Summon Usage Statistics



The screenshot shows the Oracle Analytics web interface. The top navigation bar includes 'ORACLE Analytics', 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. The main content area is divided into two sections: 'Create...' on the left and 'Recent' on the right. The 'Create...' section lists three categories: 'Analysis and Interactive Reporting' (with sub-items 'Analysis', 'Dashboard', and 'More'), 'Published Reporting' (with sub-items 'Report', 'Report Job', and 'More'), and 'Actionable Intelligence' (with sub-item 'Action'). The 'Jobs' section below lists 'Report Jobs' and 'Report Job History'. The 'Recent' section contains a message: 'Recently opened or edited items will be displayed here.' and a 'Download Desktop Tools' link. A large green arrow points from the 'Summon Usage Statistics' link in the menu above to the 'Recent' section of the interface.

Additional Q3 Resolved Issues

- 360 MARC → MFT delivery path
- Accessible Archives SUSHI retrieval
- New indexes to improve performance of working with databases
- Diacritic searching in Intota

What's Next in 2023?

- Auto-Holdings Management with Springer
- Add Open Access indicators to Management Reports, possibly Overlap Analysis
- Full release of the 360 Admin API to retrieve:
 - Providers, databases, and holdings
 - Databases and holdings by provider
 - All holdings
- Summon Analytics link in Intota



Community Engagement

Community Engagement

- Idea Exchange
 - <https://ideas.exlibrisgroup.com/>
 - Add your ideas this week to ensure consideration in the 2024 NERS voting process
 - 15 items completed in the last year; 4 more planned for completion by year's end
 - Get your ideas and votes in by Friday for inclusion in this year's voting



Questions?

Thank you!

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Amy.Pemble@Clarivate.com

