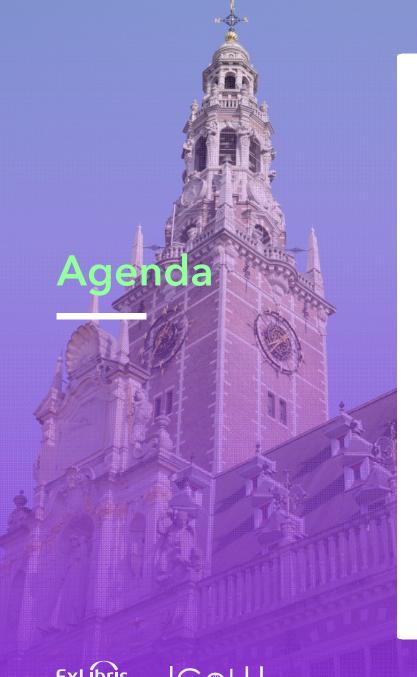




# What's New with Summon & 360/Intota Services

Brent D. Cook Director, Product Management Summon





### Summon

- Recent Accomplishments
- November Quarterly Release



~

Highlights for CDI Development in 2023



360 and Intota Services

November Quarterly Release



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		
<ul> <li>First Wednesday of all other months</li> </ul>		
<ul> <li>No preview</li> </ul>		
<ul> <li>No release notes (unless it includes customer-</li> </ul>	or patron-facing functionality)	



### Summon Roadmap Highlights

<b></b> 2023 H1	2023 H2
<ul> <li>Advanced Search: Improve Search Box Layout</li> <li>Advanced Search: Updated Look and Feel Controls</li> <li>SAML for Saved Searches</li> <li>LTI Support for Summon</li> <li>Google Analytics 4 Support</li> <li>Mandatory sender e-mail field in Summon (NERS)</li> </ul>	<ul> <li>Scopes for Summon Searches</li> <li>Improve the Quick Look Pane Layout (NERS)</li> <li>Display 5xx Fields in Quick Look (NERS)</li> <li>"Include matches in Full Text" to Search Suggestions (NERS)</li> <li>Ability to Customize Order of Elements in the Right Pane (NERS)</li> <li>Ability to match language settings of Summon with 360 Link (NERS)</li> <li>Prevent eBook and Computer File records from Merging (NERS)</li> </ul>
<ul><li>Data Quality Improvements</li><li>Ongoing Analytics</li></ul>	

• Accessibility







## Summon Recent Accomplishments

### 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

		Databases (A-Z) Feedback H
WRIGHT LIBRARY PRINCETON THEOLOGICAL SEMINARY narwhal diet	☐ Save current search and filters	🛿 Learn more 🕺 search 📕 🗉 🚍 🚱 English Log
	Search name	
) efine your energh	narwhal diet	Test
tefine your search	Filter by Publication date range	lest
Add results beyond your library's collection	Sign in to save permanently	
Full Text Online		COVID-19 Information & Addressing
Scholarly & Peer-Reviewed	G Sign in with Google Sign in wit	h Microsoft Misinformation  • Community Toolkit for Addressing Health
eBooks @ Wright Library	Sign in with Campus Login	Misinformation
Include matches in Full Text	Sign in with Campus Login	Specific guidance and resources for fait leaders and other trusted community
	Done	members to understand, identify, and
Wright Library Catalog		stop the spread of health misinformation
Open Access	View Now Article Page	in their communities. The Surgeon General's Community Toolkit for
Print Books @ Wright Library		Addressing Health Misinformation was
	Journal Article Full Text Online	developed in collaboration with the Offic of Evaluation Sciences (OES).
ontent Type 🔨 Sort -	View in Context III Browse Journal	COVID-19 and Misinformation   Rowan
Journal Article 20	Cites / Cited by	University, Campbell Library
Newspaper Article 9	Related Articles +	Resources and strategies for evaluating information on COVID-19.



### **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 ended July 1<sup>st</sup>, 2023

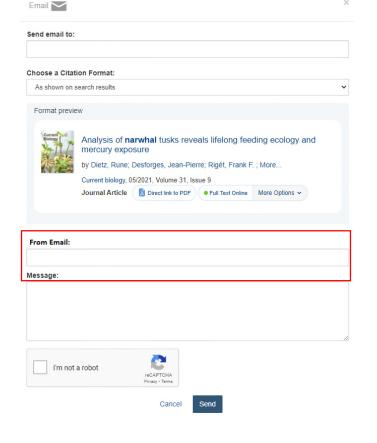




### Mandatory Sender Email Field in Summon

### 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





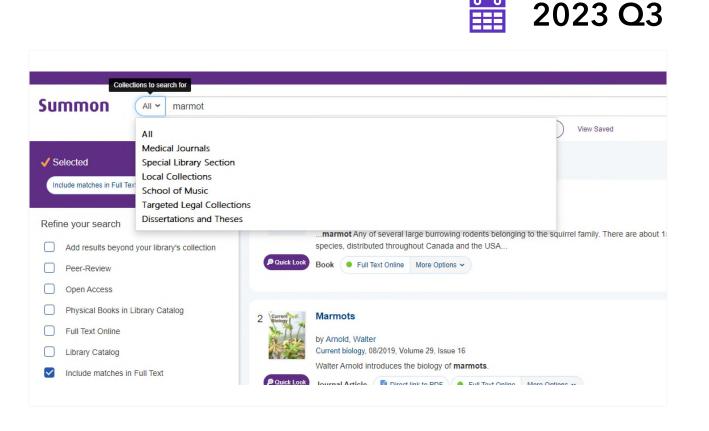
**Fxl** ihris

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### 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







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		🛗 2023 Q3
lections to s	earch for	
All ~	narwhal diet	
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Phy Ref Spe	I Text Online (Articles, Chapters, E-books, Reviews, More) vsical Collection (Print, Microform, More) ference Collection (Non-circulating) ecial Collections (Non-circulating) ght Library Catalog	Heide-Jørgensen, M. P. ; More Heide-Jørgensen, M. P. ; More Heries (Halstenbek), 04/2015, Volume 525 Hong <b>narwhals</b> Monodon monoceros from the Benland (EG) and Northern Hudson Bay
Prin	nt Journals nt Books	Text Online
ed		Browse Journal

### 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

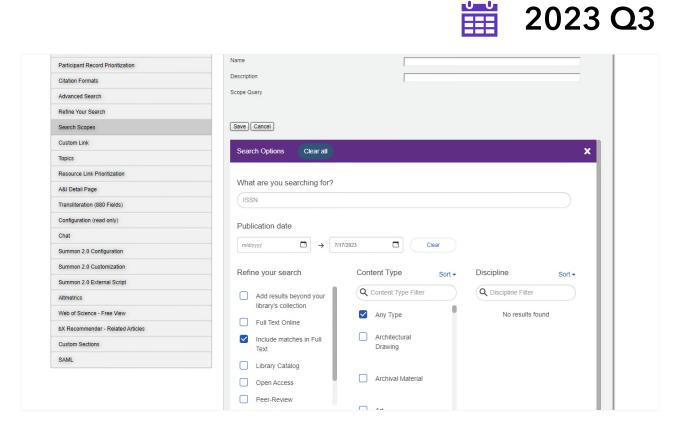
tings		(?)
General	Search Scopes	
Search Results	Enabled	Disabled
Quick Look	All	
ogos	Ford + library Edit Delete	
Subject Terms	Architecture Edit Delete	
	issn Edit Delete	
Authentication	issn open access physics Edit disciplin Delete	
acets		
Refworks	subj humans author wang wei Edit database medline Delete	
lyndetics		
anguages	Add new search scope	
Participant Record Prioritization		
Citation Formats		Save Settings Reset Form
Advanced Search		
Refine Your Search		

2023 Q3



### 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





2023 Q3

### 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









#### Abstract

Narwhals (Mondon monoceros) are sentinel species in the Arctic and to investigate marine food web changes from 1982-2011 we examined diet using fatty acids, [detla]15N, and [detla]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, [detla]15N significantly increased, [detla]13C displayed a parabolic trend, and fatty acids gradually shifted, albeit not significantly, over time. [detla]15N was stable, [detla]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 1942-2000 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

Subjects V Record Details A Publication Title Marine mammal science Volume 31 Issue

### 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

#### Summon<sup>™</sup> Editor SETTINGS MAPPING PAGES USAGE TRANSLATIONS RECOMMENDER CONTENT INGESTION Settings ? General Quick Look Search Results Quick Look Expanded Collapsed CUSTON Subjects Quick Look Record Details Syndetics Logos Subject Terms Authentication Save Settings | Reset Form Facets Refworks Syndetics



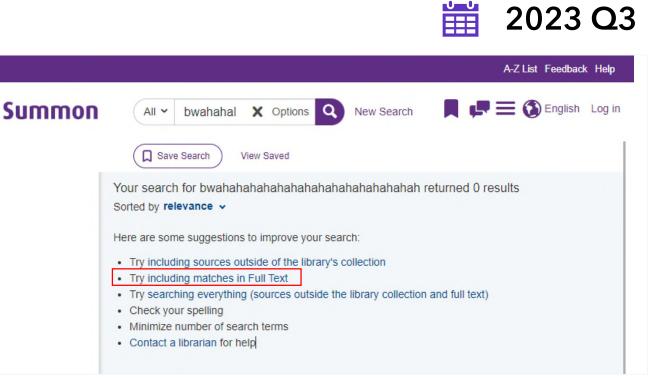
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2023 Q3

### "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







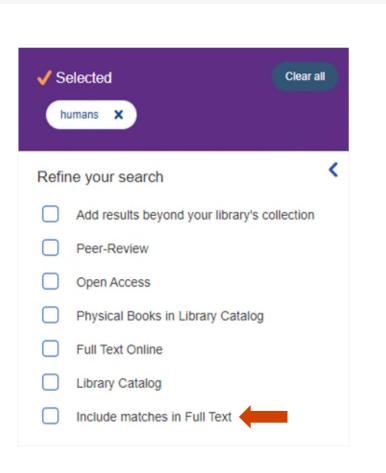
### "Include Matches in Full Text" to Search Suggestions

### 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

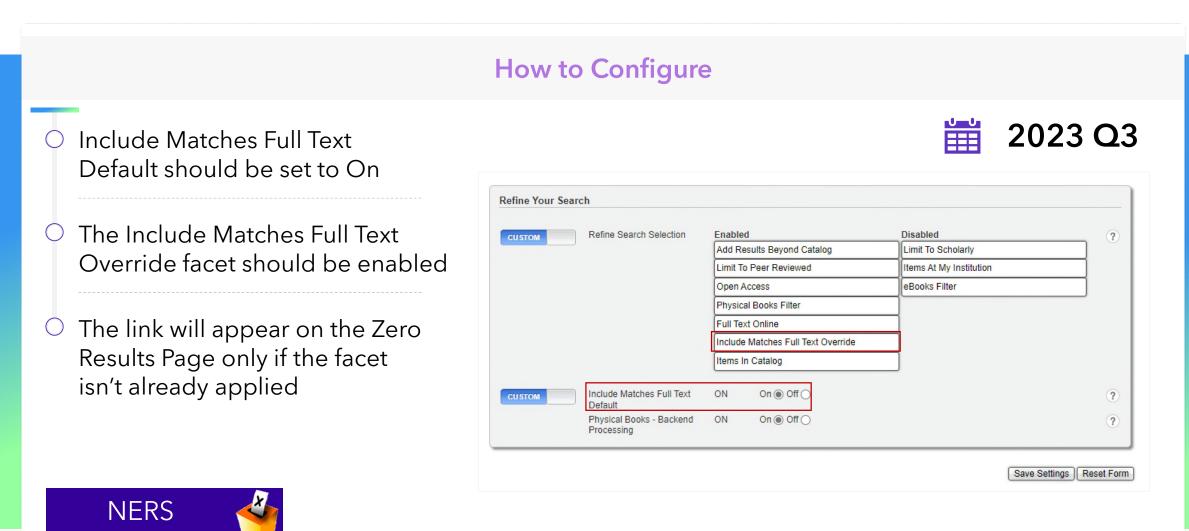






2023 Q3

### "Include Matches in Full Text" to Search Suggestions





### Ability to Customize of Elements in the Right Pane

### Improve the layout options for the right-hand pane

Off- campus: when opening a database, e-book, or other resource, you'll

Biology is the scientific study of life. It is a natural science with a broad

transmitted to future generations. Another major theme is evolution, which

explains the unity and diversity of life. Energy processing is also important

to life as it allows organisms to move, grow, and reproduce. Finally, all

scope but has several unifying themes that tie it together as a single,

coherent field. For instance, all organisms are made up of cells that

process hereditary information encoded in genes, which can be

organisms are able to regulate their own internal environments.

be prompted to log into the library's proxy server. Use your regular

Contact the library staff by email: staff@demolibrary.com

campus login to gain access.

Call the library at (260) 555-1212.

From Wikipedia, the free encyclopedia

Morgan Pruitt

910-814-8814

Send Email

Need help?

Biology

Read more

Suggested Librarian

Related Topics

Molecular biology

Synthetic biolog

Biophysics

- 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





### 

2023 Q3

×Q

#### Database finder



#### Showing 1-10 of 1 database results:

#### American Museum Of Natural History

The American Museum of Natural History database contains images from 7 collections from the museum including the Rare Book Collection, Julian Dimock Collection, Lumholtz Expedition to Mexico, Art & Memorabilia, Jesup North Pacific Expedition, Photographic Collection, and the Lantern Slides collections. The database also contains three exhibits, Natural Histories, Picturing the Museum, and the Nature. Knowledge and the Knower exhibit

contains images from 7 collections from the museum including the Rare Book Collection, Julian Dimock Collection, Lumholtz Expedition to Mexico, Art & Memorabilia, Jesup North Pacific Expedition, Photographic Collection, and the Lantern Slides collections. The database also contains three exhibits, Natural Histories, Picturing the Museum, and the Nature, Knowledge and the Knower exhibit

Time Period: 19th and 20th centuries Sources: Contains more 7,600 images Subject Headings: History, Science Scholarly or Popular: Semi-scholarly Primary Materials: Images Information Included: Full Text Findlt@BALL STATE: No Print Equivalent: None Publisher: American Museum of Natural History Updates: NA Number of Simultaneous Users: Unlimited





Description: The American Museum of Natural History database

### Ability to Customize of Elements in the Right Pane



- 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



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Custom Sections				
DEFAULT	Show 'More' enabled Default sections displayed	ON 3 🗸		?
DEFAULT	Display Order	Enabled	Disabled	?
		Springshare A-Z Database Finder		
		Custom Panel Section		
		Topic Explorer		
				[

Save Settings ] Reset Form

2023 Q3

### 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

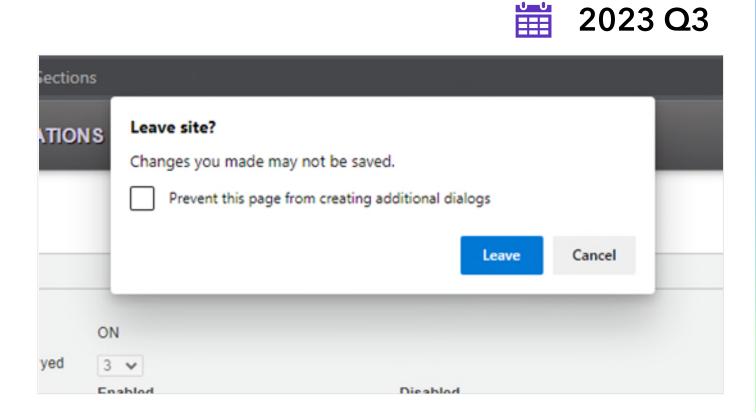


	🛗 2023 Q
A-Z Database settings	
The A-Z Database service requires an a for more details.	ctive subscription. To be able to show the widget, Springshare API details are needed. See <u>Springshare help page</u>
After providing the API details, it might to tool at the bottom of this page to see if th When you find there are search results,	
Enable A-Z database search for every Summon query	On Off
Set default number of results displayed	10 -
API URL	Something like https://lgapi-{eu/us}.libapps.com/1.2
Client ID	
Client secret key	
AZ Widget Browse URL	Something like https://{name}.libguides.com/az.php, or a custom AZ 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	Something like https://myproxy.institution.com/?url=
	Optional. If provided, database URLs that have 'enable_proxy' configured, will be prefixed by the contents of this field. Make sure it includes '?url=' (or equivalent for your proxy solution), so the proxied URL will look like 'https://myproxy.institution.com/?url=https://database.com/id/12345'.
Test credentials	First verify the SpringShare credentials.
Save cottings	Save the provided credentials for future use

### Warning to Save Changes

### How to Configure Database Finder-k

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









## **November Quarterly Release**

### **Display 5xx Note Fields in Summon**

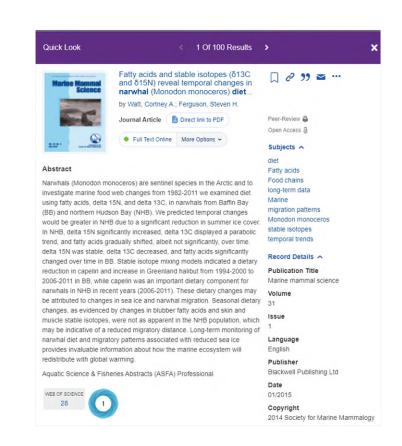
### Allow institution to add 5xx note fields to Quick Look

- 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 🗳

**Exlibris** 

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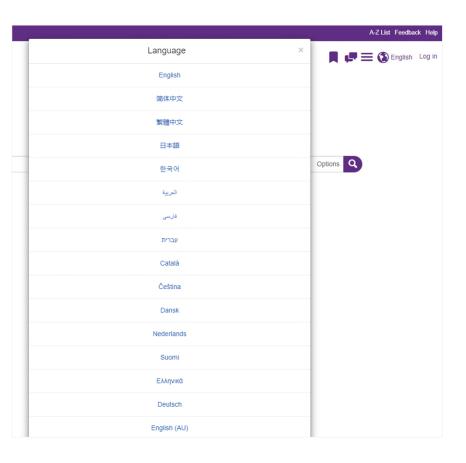




### Ability to Match Language Settings of Summon with 360 Link

### Ensure language parameter is passed from Summon to 360 Link

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









### Prevent eBook and Computer File Records from Merging

### Ensure language parameter is passed from Summon to 360 Link

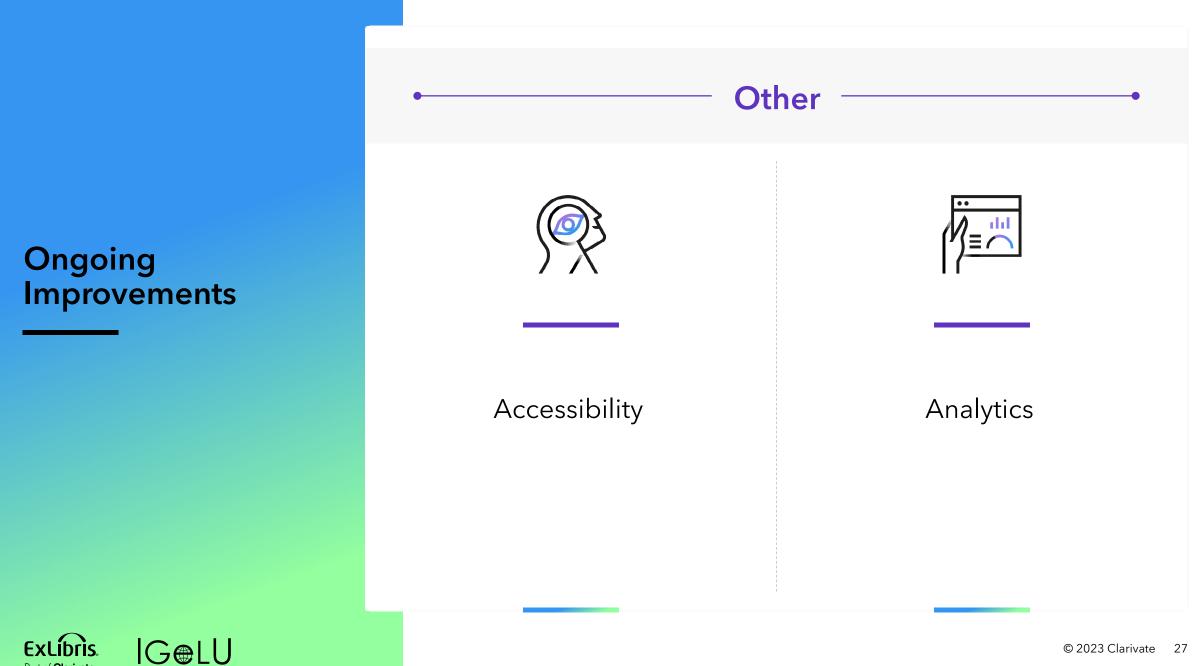
- Prevent Computer File records to merge with any other Content Type
- Only allow Computer File type records to merge with each other











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## **CDI Improvements**

### **CDI Data Quality and Rights enhancements**

### **CDI Rights Processing**

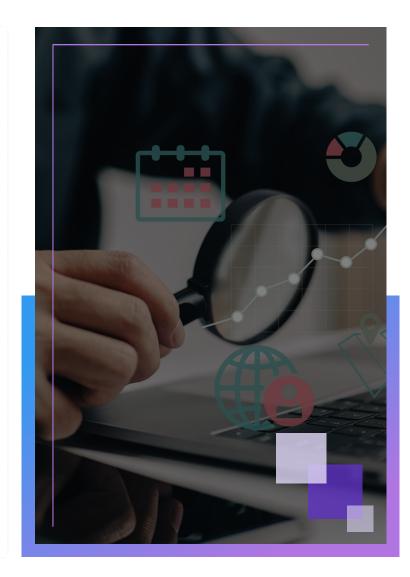
• Reduce to 24 - 30 hours average

### 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

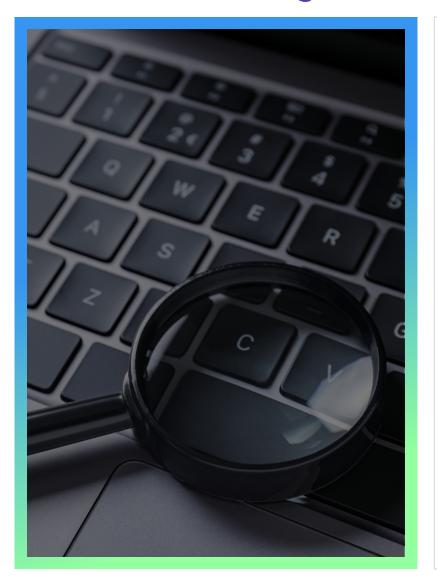
### Bigger, longer term data projects

- Addition of 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







Adding more content providers is 2023 priority



Now with **39** supported providers



Over **16,304 collections** with 1.56 billion records



Linking success rates - 99%

Prov/day + +	Content + +	Type of QuickTrik (PDF/HTHL) + +	
ACH Dight Library	a)	101	
Enter	A	87%	
ProQuest	All Content excluding efforts on the ProQuest Partners https://www.propuest.com	NTHLER MARK MARKS IN IN CONTRACT OF FOR IVER AND INTERNATION	
GASE Publishers	зачивалия ида Дание народалии	FOR HTML	
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University of Chicago Press		POT,HTHL	
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Diegana Publiciera	AI.	10	
NoneScientific Fuel lang		104	
Cambridge University Press	Journals, Books	HTVL	
American Dremital Society	Jaure Lane	725,87%	
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American Society for Withold State	jauran .	ROM.HTVL	
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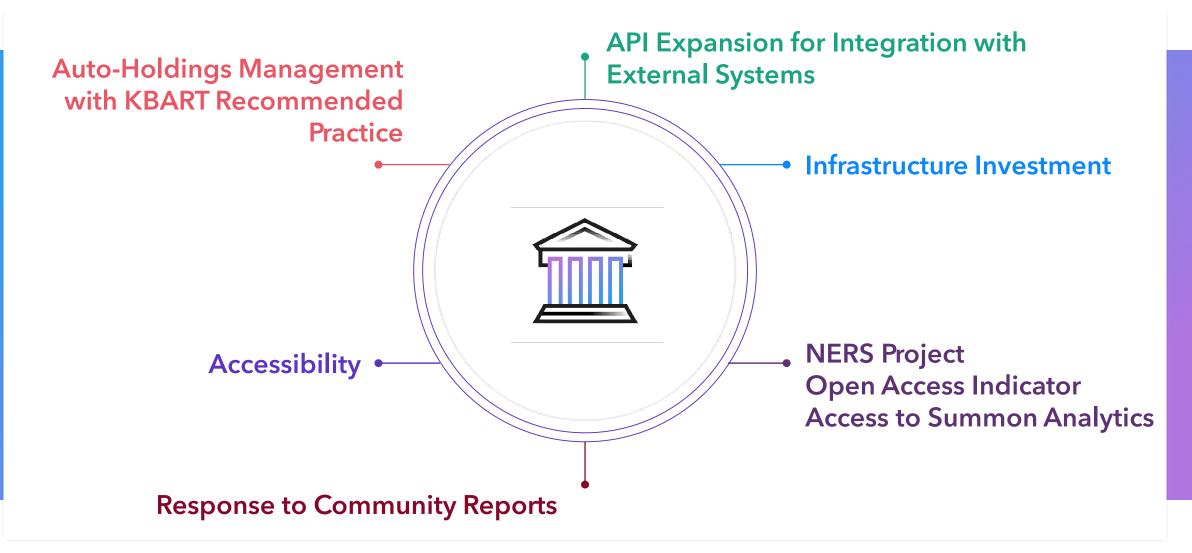






## 360 and Intota: the Idea Exchange Edition

### 2023 Roadmap Highlights





### Quarterly Release Dates

ExLibris.

Part of **Clarivate** 

**IGe**LU

February 1
May 3
August 2
November 1

### Q3: Idea Exchange

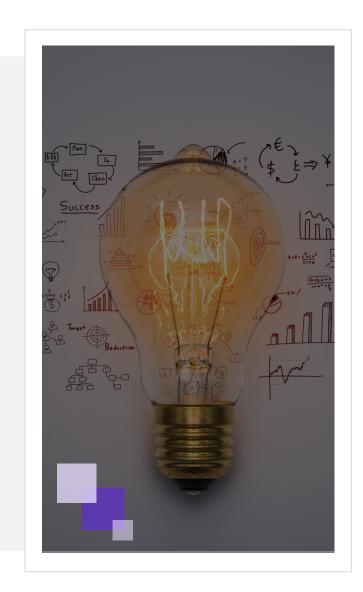


Auto-Holdings Management with Taylor & Francis is live!



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

You can now configure auto-holdings management for ebook titles in **Taylor & Francis eBooks A-Z** (JTX)

• Weekly updates - Saturday/Sunday

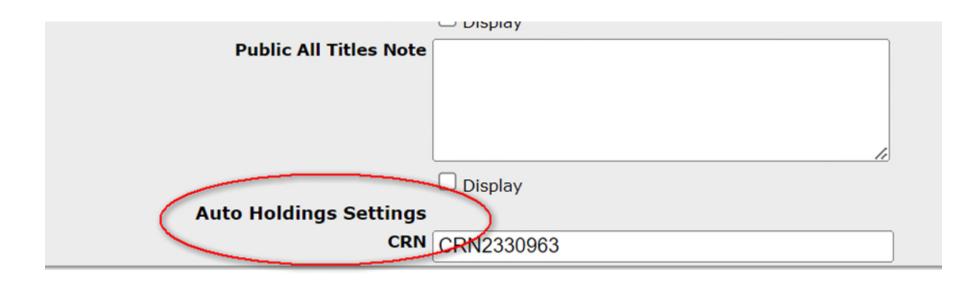
• Ex Libris calls a T&F API endpoint and retrieves a KBART-formatted file of your holdings







#### **360 Configuration: Database Details**





### Intota Configuration: Database Details

About		* Required Field	Cancel Save
	Database Name *	Taylor & Francis eBooks A-Z	
	Provider Name	Taylor & Francis	
	Status	Subscribed V	
	OA Coverage	0 %	
	MARC Coverage	85 %	
	Title Coverage	ONLY SELECTED titles	
Database Description			
Long Database Description			
	Automate Holdings	Automatic Manual	
	CRN	CRN2330963	

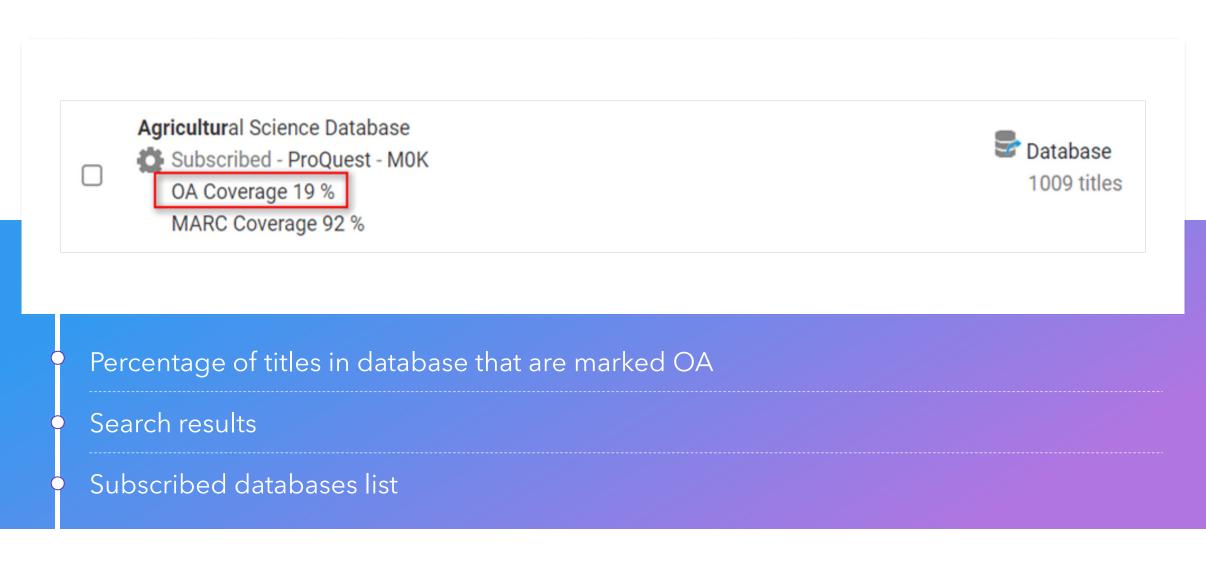


#### **Open Access Indicators for Databases and Titles**

- 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

**O** Ulrich's is the information source





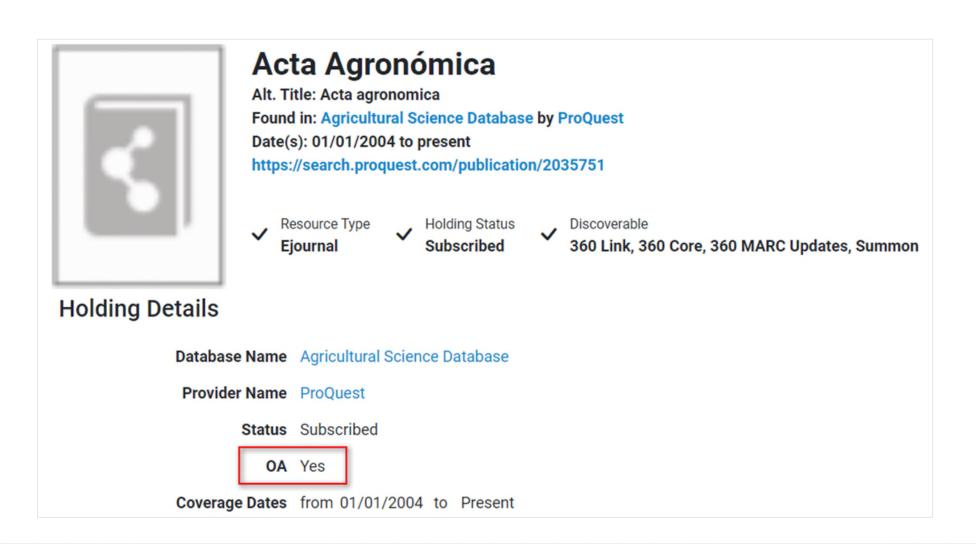


	Agricultural Science Database (MOK) https://search.proquest.com/agriculturejournals ProQuest 1009 titles (7 books, 1002 journals, 0 videos)						
	<ul> <li>Resource Type</li> <li>Database</li> </ul>	• •	Status Subscribed	~	Discoverable 360 Link, 360 Core, 360 MARC Updates, Summon		
	Last Full Updat Last Partial Up		04/19/2023 07/31/2020				
Titles (1009	tracked of 1009	)					
About							
About	Database Name	Agricul	tural Science D	ataba	ise		
About	Database Name Provider Name	•		ataba	ise		
About		ProQue	st	ataba	ise		
About	Provider Name	ProQue Subscri	st	ataba	ise		
About	Provider Name Status	ProQue Subscri 19 %	st	ataba	ise		



Title 🛓	Identifier	Туре	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 Xylologiae 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

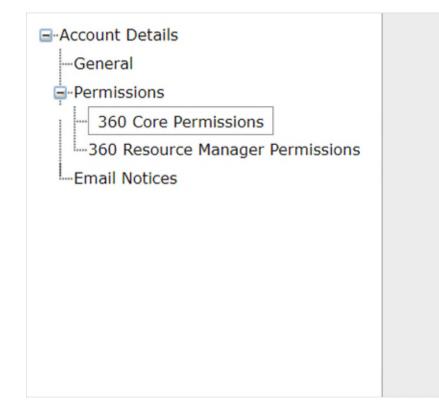






#### **Non-Admin Link to Summon Analytics**

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



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

<b>Business Intelligence Tools</b>	
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
★ ORACLE: Analytics          Create         Image: Comparison of the system         Image: Comparison of the syst	Mere Catalog Favorites * Dashboards * Create * Open * <b>Cente Recenti Overnicad Desktop Tools </b>



### Additional Q3 Resolved Issues

○ 360 MARC  $\rightarrow$  MFT delivery path

• Accessible Archives SUSHI retrieval

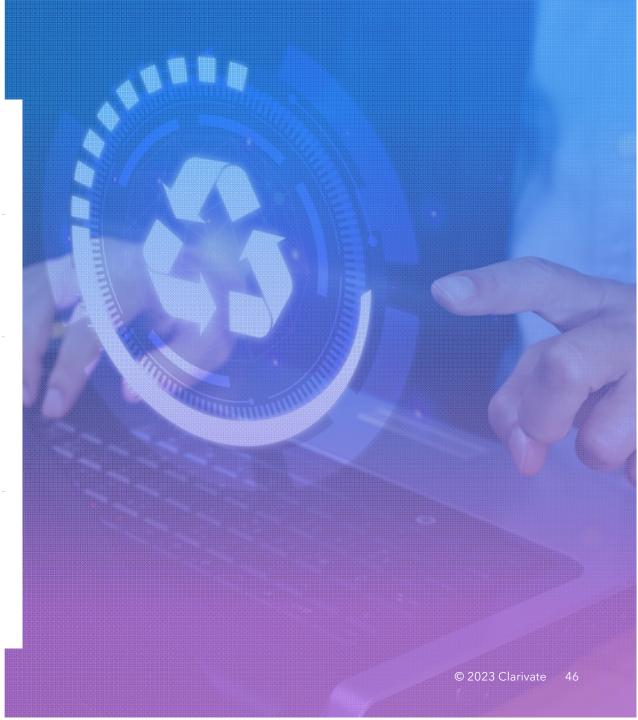
New indexes to improve performance of working with databases

Diacritic searching in Intota

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Part of Clarivat





Auto-Holdings Management with Springer

Add Open Access indicators to Management Reports

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**



- Planning for 2024 Roadmap already underway
- Ways you can get involved
  - Idea Exchange
  - NERS voting









## **Questions?**



Part of **Clarivate** 



## **Thank You!**

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#### **About Clarivate**

Clarivate is the leading global information services provider. We connect people and organizations to intelligence they can trust to transform their perspective, their work and our world. Our subscription and technology-based solutions are coupled with deep domain expertise and cover the areas of Academia & Government, Life Sciences & Healthcare and Intellectual Property. For more information, please visit <u>clarivate.com</u>

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