What's New with Summon & 360/Intota Services

A review of recent functionality, upcoming releases and recent udpates



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- Intota & 360 Services

What's New with Summon & 360/Intota Services

A review of recent functionality, upcoming releases and recent udpates





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?

Planned Release Dates and Preview Environment

Quarterly Releases – include release notes and preview period

Quarterly Release Dates

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

Preview Release Dates

- January 18
- April 19
- July 19
- October 18

- Maintenance Releases
- First Wednesday of all other months
- No preview



Recent Improvements in Summon

Highlights from 2023

- Sierra via Summon: SAML for Saved Searches
- Google Analytics
- Scopes for Summon Searches
- Quick Look Pane improvements
- "Include Matches in Full Text" to Search Suggestions
- Ability to Customize of Elements in the Right Pane
- Warning to Save Changes in the Admin Console



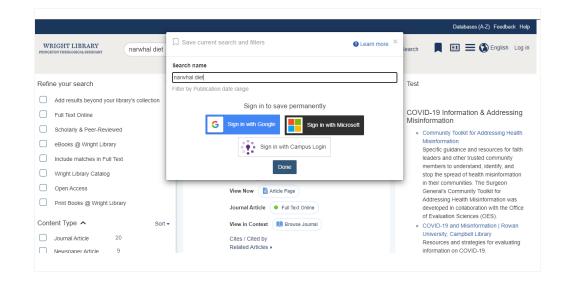
Summon Recent Accomplishments



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





Google Analytics

Support for Google Analytics 4

Operails

- Improve reporting by updating Google Analytics to support current version
- Also includes Tag Manager Support

Note: Google support for legacy analytics ended July 1st, 2023



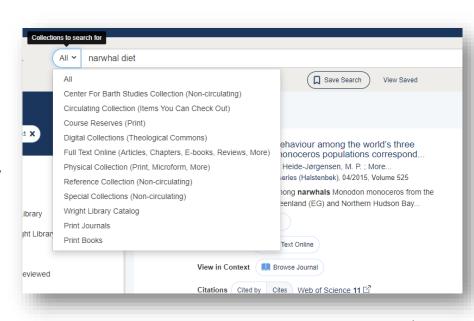


Scopes for Summon Searches

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
- 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



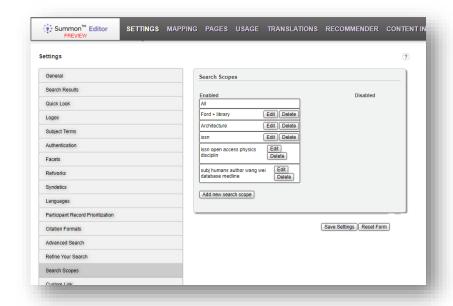


Scopes for Summon Searches

How to Configure Search Scopes for Summon

⟨⊙⟩ Details

- 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

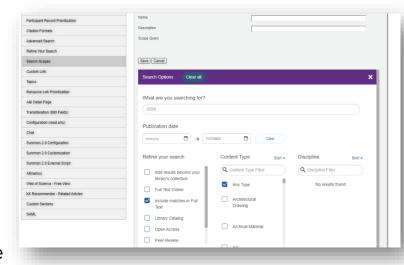




Scopes for Summon Searches

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

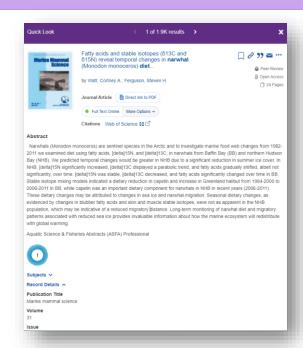




Improve the Quick Look Pane Layout

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

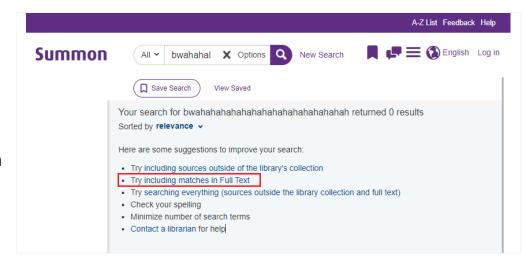




"Include Matches in Full Text" to Search Suggestions

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





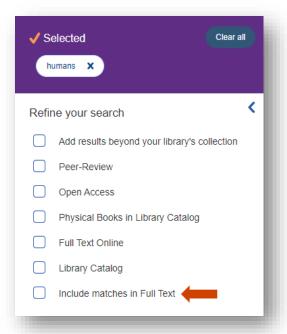


"Include Matches in Full Text" to Search Suggestions

Appearance on Zero Results page is contextual

(ô) Details

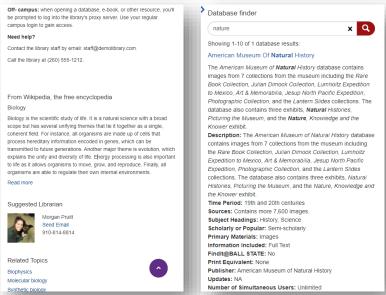
 Will only appear if Including Matches in Full Text is an option under Refine Your Search and the search doesn't already have it applied



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





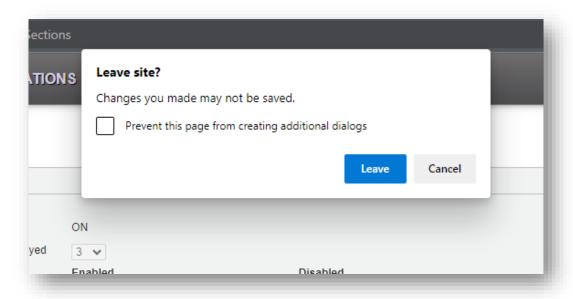


Warning to Save Changes

Prevent Lost Work on Configurations

(ô) Details

• 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







What's in the November Release

Improvements and Adjustments

- Send Summon Language Settings to 360Link: A NERS Enhancement from the Idea Exchange
- Normalized Subject Headings: A CDI Update
- Scopes Update
- Display 5xx Notes Fields: A NERS Enhancement from the Idea Exchange
- Unpaywall Indexing
- Prevent Ebook and Computer File Records from Merging: A NERS Enhancement from the Idea Exchange



November Quarterly Release



Check Your Custom JavaScript

- Recent changes in the User Interface may have affected your implementation of custom JavaScript
- Use the Preview Environment to test your custom scripts

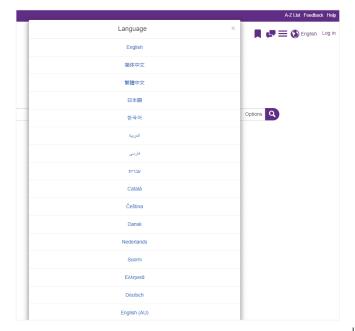


Ability to Match Language Settings of Summon with 360 Link

Ensure language parameter is passed from Summon to 360 Link

Operails

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



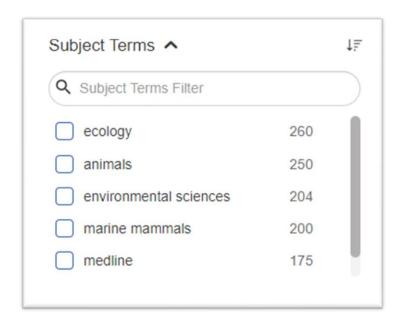




Normalized Subject Headings: A CDI Update

All English language subject headings in CDI have been mapped and deduped against LCSH (Library of Congress Subject Headings) and MeSH (NIH Medical Subject Headings)

- All English language subject headings in CDI have been mapped and deduped against LCSH (Library of Congress Subject Headings) and MeSH (NIH Medical Subject Headings
- Institutions can now use these headings for their subject facet in place of the current

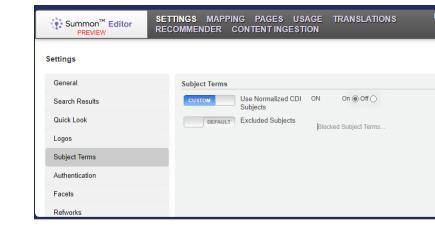




Normalized Subject Headings: A CDI Update

How to Turn on Normalized CDI Subjects

- To configure the use of Normalized Subject Headings for your facets, you'll find the controls in the Admin Console, under Settings > Subject Terms:
- For the control Use Normalized CDI Subjects, switch from Default to Custom and set the field to ON
- Click the Save Settings button and within 5 minutes the update should be applied to your instance of Summon

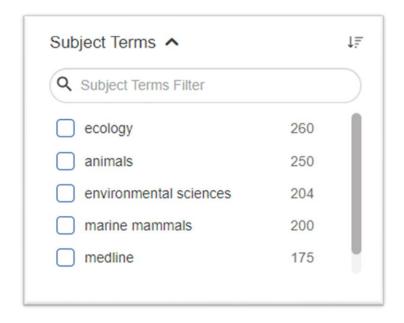




Normalized Subject Headings: A CDI Update

Configuration of Normalized Subject Headings

- The Normalized Subject Headings will replace your current Subject Terms facet
- Subject headings that could not be mapped, including all non-English subjects, are still available for display and search when the new normalized subject headings are in use
- Institutions can choose between maintaining Subject Headings as they are today or replacing them with **Normalized Subject Headings**

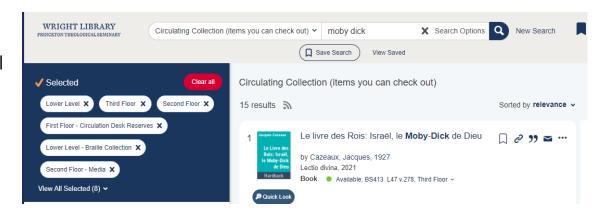




Scopes Update

Better Identification of Scope Components

- Based on your feedback, we have updated how Scopes are represented in the Summon UI
- Facets applied as part of a Scope are now displayed at the top of the Facet Pane



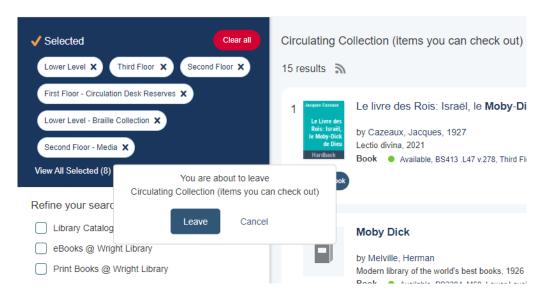


Scopes Update

Better Communication to the End User

(ô) Details

 Changing any of the parameters for the scope will now display a warning dialog box that the user is about to leave the selected scope





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



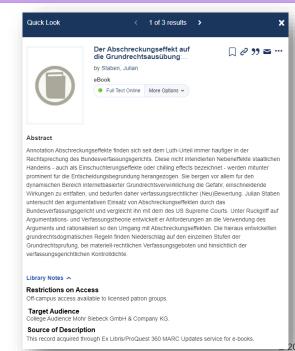




Display 5xx Note Fields in Summon

Display of fields will require mapping and content processing

- Display of fields will implementation assistance by Ex Libris for each institution
- Instructions for requesting this change will be provided after release
- Time to implementation for your institution will depend on request volumes







Unpaywall Now Available as a Collection

Changing from Augmenting Records to a Collection Improves Open Access Functionality

- Unpaywall will now be an option under the Database facet
- Records merged with Unpaywall records will be flagged as having an Open Access (OA) option
- OA labeling and faceting on the search results page will now reflect OA status from Unpaywall





Unpaywall Now Available as a Collection

Subscribe to the Collection in Client Center after the Release

- Indexed Unpaywall links will be returned by CDI as regular IEDL links and will be prioritized using standard linking logic
- Unpaywall links will be returned as the "Link to PDF" element on the Summon search result when there is no available Quick Link
- Adding Unpaywall to your instance of Summon will follow the same process as adding any other collection to Summon





Prevent eBook and Computer File Records from Merging

Requires Content Processing which will begin after the November release

Operails

 Prevent Computer File records to merge with any other Content Type



Ongoing Improvements







Accessibility

Analytics



Sneak Peek 2024

Finish LTI Support

Improved Search Widget

UI Analytics

plus NERS Candidates

Final details and official features for the 2024 roadmap to come



Planned and Completed Updates

- CDI Data Quality and Rights enhancements
 - CDI Rights Processing
 - Data quality
 - And other long-term projects
- Secondary Resource Types
- Search and Ranking
 - Known item search enhancement with Al
 - Hebrew Search Plugin
- Quicklinks





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





Addition of Secondary Resource Types for CDI

CDI secondary content types provide specific information about the type of record

- They do not replace but add value to the record's primary content types
- Their purpose is:
 - To display additional information about the record/item in the brief display and Quick Look
 - To allow filter/search on these secondary types as part of Secondary Content Type facet





Addition of secondary resource types for CDI

The Two Types of Secondary Resource Types

- **Regular** These types display as indicators in the brief display of a record in the search results and Quick Look.
- **Warning** These types display above the brief display of a record in the search results and Quick Look





Addition of Secondary Resource Types for CDI

Currently Supported Secondary Content Types

Operails

- Review Article
- Primary Source
- Preprint
- Retracted Publication
- Retraction Notice
- Publication with Addendum
- Publication with Corrigendum

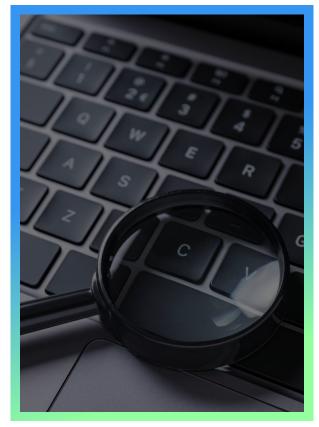
Search on "Secondary Content Types" in the Knowledge Center for:

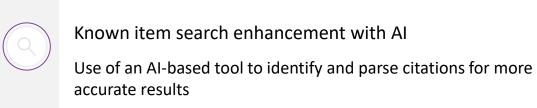
Definitions of these content types
Details on types planned for future release
Instructions on configuration

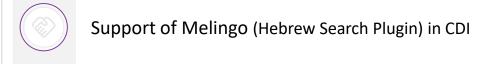
https://knowledge.exlibrisgroup.com/Summon/

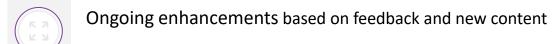


Search and Ranking











Quicklinks











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%

Provider + *	Content • •	Type of Quicklink (PDF/HTML) + +
ACH Digital Library	Al	101
timie	Al	HTHS.
ProQuest	All Content excluding eSociation the ProQuest Platform: https://www.groquest.com	HTML In modicases a link to download the POF full is included with the article)
SAGE Publications	Journal aunder hotps://journal.com/gegut.com	POENTML
Springer Nature	Journalisms Sociation or https://inkugringe.com	PORHTML
Wing-Stational	Journal and Sociaturder https://on/hefstarpur/eycom	FOR HTML
Bloom	Journals Content under https://blooms.org	101
IOF Fusioning	Al	FOF
National Library of Medicine	Content which is part of Publish Central collection under https://www.nobl.nim.nih.gov	FDE,HTML
New England Journal of Madicine	Contentunder https://www.nejm.org	FORHTML
tresit	Journalisms Society of the Physics of the Park Comp.	FORHTML
Credo Reference	Contentunder https://search.oredore/erence.com/	PDEHTML
Trians	All journal content besides conference proceedings under hitps://www.titlene- connectes/product.wais/journals	POEHTML
eee	Contentunder https://eessgiore/ees.org	HTHS
Many Ann Clabert, Inc.	Journal support Military (Montal Service September 1998)	FORHTML
pre .	Contentunder https://www.apiedigite/forery.org/	FORHTML
University of Chicago Press		POE, HTML
Royal Society Publications	Contentunder https://royalocietypublishing.org	POR HTML
Project MUSE	Journal and Socia under https://muse/hu.edu/	Journale (FDE,HTML) Social (HTML)
J\$10R	Journal's Content under https://www.jstonorg/	FORMTHL
American inetitute of Aeronautics and Astronautics	Journals, Standards, Proceedings, Social Under https://brc.a/as.org/	Journals, Standards, Proceedings (PDF, HTHL) Social (HTHL)
Alexander Street	Al	HTML
Taylor & Francis	Al	POT, HTML
Engola Publicaria	Al	FOF
World Scientific Publishing	James	FOF
Cambridge University Franc	Journals, Social	HTHS.
American Chemical Society	Journals, Socia	POEHTML
具有表現出版社 (Higher Education Free)	Journals	HTHL
American Society for Microbiology	jumi	POEHTML
NYORMS	Al	POEHTML
Edinburgh University Press	Journal aunder https://www.euggubilehing.com/	POE,HTML
Harmattan	Socia	HTHS
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USPTO	Duplished applications and leaved patents available under topic illigates upting projective each place (place) pube tags (1979).	for



360 & Intota Q4 Release Highlights (Nov. 1)

Open Access Indicators in Management Reports

Allow Login to Summon Usage Statistics from Intota

New 360 Link Linkers

SUSHI Harvesting Improvements

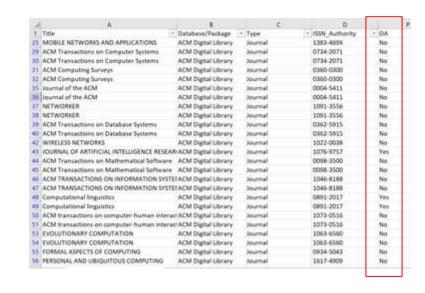
Ulrichsweb UI Enhancements



Open Access Indicators in Management Reports

Quickly identify Open Access titles and percentages in Database Details, Tracked Resources, and Tracked eJournals reports

- Builds on the OA indicators feature released in 2023 O3
- Based on authoritative data from Ulrichsweb.
- Database Details report includes an OA % column
- Tracked Resources report includes an OA Yes/No column
- Tracked eJournals report includes an OA Yes/No column





Allow Login to Summon Usage Statistics from Intota

(Idea Exchange #43682661)

This enhancement allows Intota users to authenticate into and use Summon Usage Statistics without full Summon administrative permissions

(6) Configuration

- The account permission "Summon Usage Statistics" should be set to View/Edit to make the link appear.
- Link appears in the Administrative section of the home page.

Product Administration Console	
360 Link Customization	View/Edit
Display full details in View Updates	None
E-Journal Portal Customization	View/Edit
Knowledgebase Notifications	View/Edit
Statistics Tools	None
Summon Customization	None
Summon Usage Statistics	View/Edit



New 360 Link Linkers

- New York Review
- Duke University Press
- Note that most linkers updates/additions are released on a monthly basis

SUSHI r5 Harvesting Improvements

- American Society for Cell Biology
- American College of Physicians
- Begell House



Ulrichsweb UI Enhancements

These enhancements round out the user interface work for Ulrichsweb and USAS, resulting in accessibility compliance and a superior user experience.

(6) Updates

- My Ulrich's displays marked titles and saved lists
- My Ulrich's delete icon
- Additional USAS pages upgraded to new UI framework



Sneak Peek 2024

Auto-Holdings with Springer

IPv6 support

NERS projects

360 KB Auto-Normalization project



Community Opportunities

Learn and Connect

- Upcoming ELUNA learns webinars
 - Analytics
 - Metadata Management and Government Documents
 - Acquisitions and Discovery
- Library Journal webinar on November 2
 - Unlocking Connections How Linked Open Data Benefits Library Users



Keeping Engaged with the Community



Upcoming Online Events

ELUNA learns continues in October, November and December!

Analytics

- Date: Wednesday, October 25
- Time: 1:00-3:40 pm EDT
- Topics
 - Publishing without perishing: making the most of Alma Publishing
 - Springshare Integration with Ex Libris Tools
 - Simplify Your Batch Cataloging with the Alma to MarcEdit Integration

Metadata Management and Government Documents

- Date: Wednesday, November 1
- Time: 1:00-3:40 pm EDT
- Topics
 - MARCIVE Data Enrichment at Penn
 - Resolving Mixed-Format Government Document Records in an Alma Network Zone
 - Rectify eResource Records Using Normalization & Indication Rules, OpenRefine, and Python Script

Acquisitions and Discovery

- Date: Wednesday, November 8
- Time: 1:00-3:40 pm EDT
- Topics
 - Templates, Lists, & Other Greatest Hits: Top 5 Rialto Features to Level Up your Collection Development
 - Rialto is Everywhere: Integrations for Streamlining Work
 - Not Just Another Book Display: Enhancing Browsability with Primo Collections at Fondren Library



https://el-una.org/meetings/eluna-learns-2023/

Upcoming Online Events

Library Journal webinar on November 2.

Unlocking Connections - How Linked Open Data Benefits Library Users

- Date: Thursday, November 2

- Time: 11:00 am (New York); 3:00 pm (London)

- Topics
 - Collaborating with the community
 - Bringing linked open data into libraries
 - Create a metadata ecosystem of global discoverability and comprehensive interoperability



https://event.on24.com/wcc/r/4371566/7AB98FD37EAB3480C0D229B0023FBC27?partnerref =LJSPNSRExLibris110223



Thank You for Your Support!

Any questions?

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How much we appreciate your input and engagement

