# Introduction to Summon

﻿﻿﻿﻿﻿Hello, Summon allows users to find content across the breadth of your library’s collections. Including your library’s catalog, full-text databases, online video and audio, and abstracting and indexing content. As well as your library’s study guides and institutional repositories.

In this session you will learn what Summon is and how to use basic features including how to search, refine, get, and save content.

Summon is powered by the Ex Libris Central Discovery Index (or CDI), which you’ll learn more about in the next session. The CDI contains billions of records from more than 7,000 content providers and represent over 90 different content types.

Your Summon implementation team will use one of three back-end tools: the 360 Core Client Center, Intota, or Alma, to tell Summon which subscrptions and open-access eResources to include. As well as your own catalog, study guides, and repositories.

All together, this allows researchers to discover content across your institution’s collections using one, easy-to-use interface.

The Summon homepage is customizable to include links that best support your users, which is covered in the Summon Customization training sessions. However, most researchers will not see this page, instead they’ll access Summon via a search box widget on your library’s website. For this training session we’re going to use the Summon Homepage.

To search, enter your search terms, Summmon autocomplete feature will provide some suggestions as you type. You can either finish entering your query or select one of the suggested terms; then click Search.

Summon uses a proprietary algorithm to determine how relevant each result is to the search terms, placing the most relevant at the top. You can also sort by date, Author, or Title, but this will turn off relevance ranking. Instead, it is recommended that you filter materials so that the most relevant items are still at the top. To expand your results, you can check the box for “Add results beyond your library’s collection,” to see additional results from the CDI.

You can use refinements and facets to narrow your search results. These selections will remain in place between searches but can be cleared at any time by clicking the associated checkmark; or click Clear Filters. All filters are cleared if you start a New Search.

When you find a result you are interested in, such as a group of newspaper articles, they are “rolled up” together. Click on the result to see just those articles.

For more information about an item, such as an article, click Quick Look. To see the full-text, click on the article title. If Summon has an Index-Enhanced Direct Link for this resource it will go directly to the article. If not, Summon will route you through the library’s full-text link resolver.

Now that you have some citations you would like to reference later, send to a friend or colleague, or print, there are a few ways you can save them. To save a citation, click the banner icon. The icon will change color to show that the item has been saved to your temporary Saved Items folder; noted by the larger banner icon with the number next to it. Citations in this folder can be formatted and printed or exported. Please note, that they will disappear when you close your browser or if Summon is left unused for an extended period of time.

Click the chain link icon to get a Permanent Link. You can share this link with any other researcher to take them to this exact citation in Summon, not the full-text on the providers site.

You can also save the search query, so that it can be run again later. Click Save Search, in the pop-up you can give it a name. Note, that like saved citations, when you close your browser these saved searches will be lost. If you sign into your account with Google Drive or Microsoft OneDrive, you can save your searches permanently.

Click Done, when you’re finished.

You now know what Summon is and how to search, refine, get, and save citations in Summon.

Thanks for watching!