



ExLibris  
Part of Clarivate

# Roadmap 2024: Summon, 360, CDI

Amy Pemble

March 2024

# Presented by:



## **Amy Pemble**

- Director, Product Management
- CDI
- Summon (interim)
- Intota & 360 Services

# Summon 2024 Roadmap

# 2024 Release Dates for Summon and 360/Intota

<b>Quarterly Release Date</b>	<b>Preview Release Date</b>
February 14, 2024	<i>No preview required</i>
May 1, 2024	April 17, 2024
August 7, 2024	July 24, 2024
November 6, 2024	October 23, 2024

- Summon and 360/Intota have the same quarterly release dates
- Summon maintenance releases occur on the first Wednesday of all other months
- There are not preview environments for maintenance releases

# Q1 2024 Release Highlights

- **Summon + Canvas LTI Integration**
- **Notes Search Field in Advanced Search**
- **Auto-enable Quicklinks**
- **Auto-holdings management with Springer Nature (for 360 & Intota libraries)**
- **Additional Fixes**

# Summon + Canvas LTI Integration

## Securely and Seamlessly Integrate Canvas and Summon

### Details

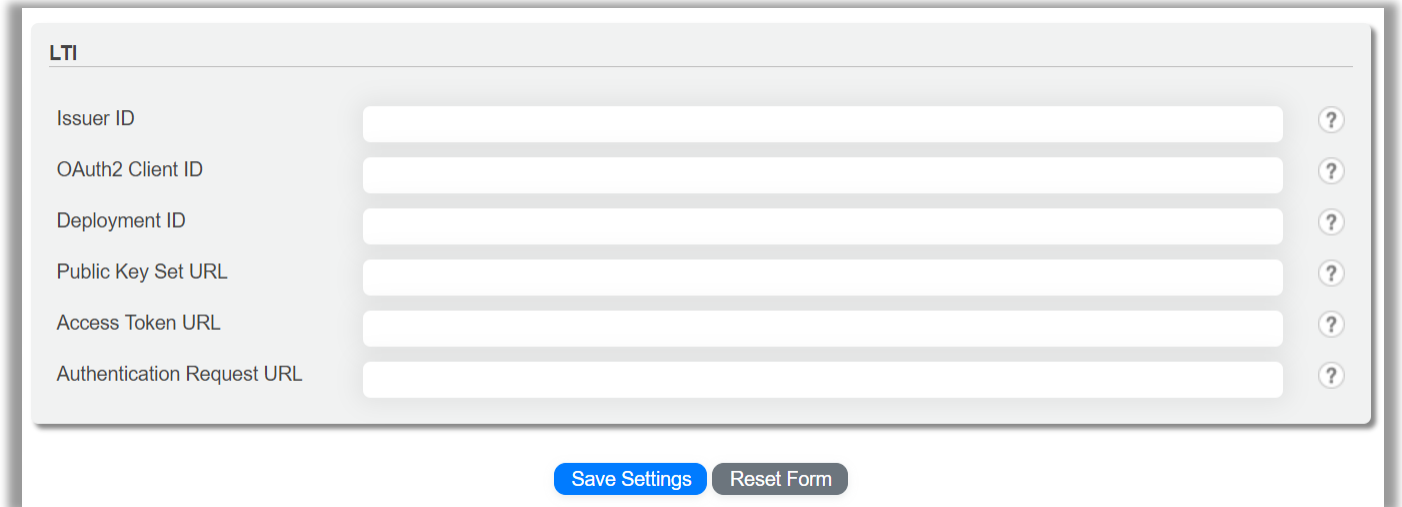
- LTI (Learning Tools Interoperability) is a standard used by LMS to talk to remote platforms
- The integration requires a “handshake” between systems so that users don’t have to authenticate in 2 different systems.
- Within Canvas
  - An **administrator** makes a Summon app available to course instructors
  - An **instructor** can
    - Link to the library’s base Summon URL in a course
    - Add a bookmark to a specific record in Summon or add a Summon search URL
  - A **course participant** can access Summon content from the pre-defined URL as an authenticated library user (i.e. no additional proxy or login required).

# Summon + Canvas LTI Integration

**Securely and Seamlessly Integrate Canvas and Summon**

## Configuration

- New Customizer > Settings > LTI section
- Values must be obtained from Canvas



The screenshot shows the LTI configuration interface. It features a title 'LTI' at the top left. Below the title are six input fields, each with a corresponding label and a help icon (a question mark in a circle) to its right. The labels are: Issuer ID, OAuth2 Client ID, Deployment ID, Public Key Set URL, Access Token URL, and Authentication Request URL. At the bottom of the form, there are two buttons: 'Save Settings' (in blue) and 'Reset Form' (in grey).

Field Label	Input Type	Help Icon
Issuer ID	Text	?
OAuth2 Client ID	Text	?
Deployment ID	Text	?
Public Key Set URL	Text	?
Access Token URL	Text	?
Authentication Request URL	Text	?

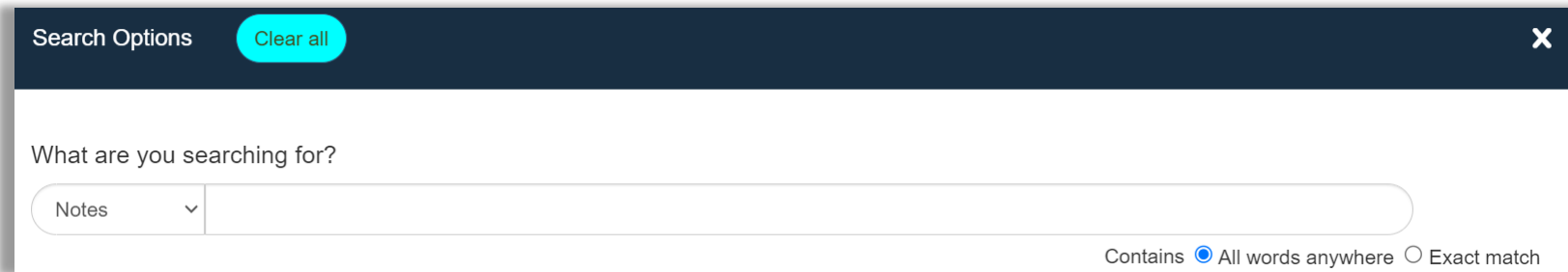
Buttons: Save Settings, Reset Form

# Notes Search Field in Advanced Search

## Dedicated Field for Searching Notes Metadata

### Details

- Complements current search syntax in the basic search (*Notes:string*)
- Two options
  - All words anywhere (contains)
  - Exact match



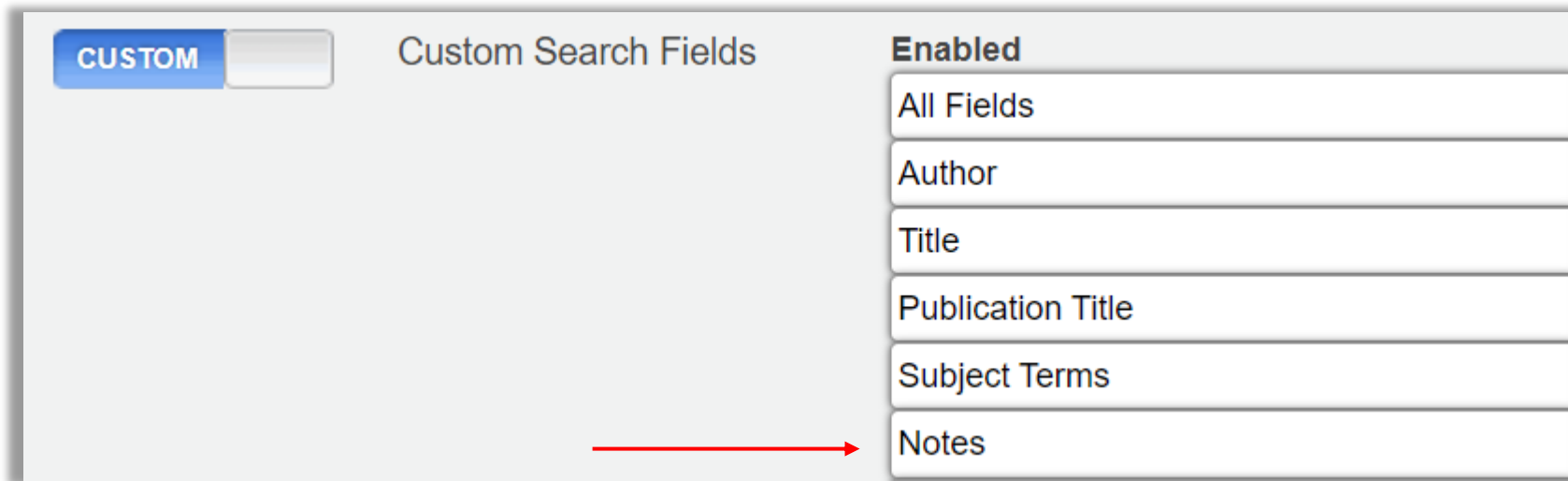
The screenshot shows a 'Search Options' dialog box with a dark header bar containing 'Search Options', a 'Clear all' button, and a close 'X' icon. Below the header, the text 'What are you searching for?' is displayed. A search input field contains the text 'Notes' followed by a dropdown arrow. At the bottom right of the dialog, there are two radio button options: 'Contains' (which is selected) and 'Exact match'.

# Notes Search Field in Advanced Search

## Dedicated Field for Searching Notes Metadata

### Configuration

- Customizer > Settings > Advanced Search





# Auto-Enable Quicklinks in May 2024

## Increase Linking Accuracy and Clarifying Access

### Details

- Enables users to go directly to the full text with one click to either a PDF or HTML file
- Quicklinks have a 99% linking accuracy rate to more than 1.5 billion records
- About 50 participating providers with more coming
- Option is available in February release but not actionable until May
- Your library can opt out of Quicklinks at any point!

# Auto-Enable Quicklinks in May 2024

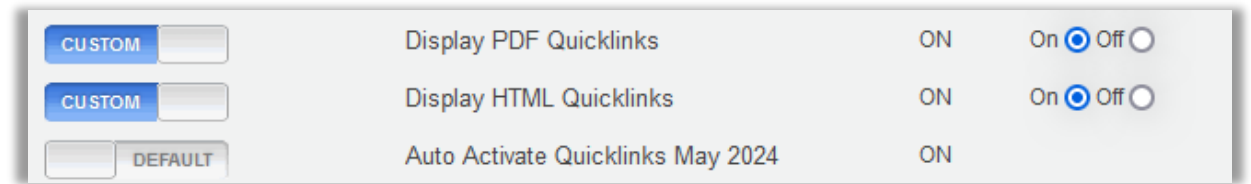
## Increase Linking Accuracy and Clarifying Access

### Configuration

- Customizer > Settings > Search Results
- Default value is ON
- If you currently have Quicklinks enabled, take no action
- If you do not already have Quicklinks enabled, you will not see any changes until May.

### **Once the May release is live:**

- Quicklinks will automatically be enabled if this parameter's value is On.
- Quicklinks will be disabled if you change the parameter's value to Off.



# Auto-Holdings Management: Springer Nature

**More KBART Automation to Save 360/Intota Users Time & Effort**

## Details

- Automate the exchange of subscribed titles with provider Springer Nature
- Standards-based
- Available for ebooks AND ejournals!
- Weekly updates (Saturday in North America)

**SPRINGER NATURE**

# Auto-Holdings Management: Springer Nature

**More KBART Automation to Save 360/Intota Users Time & Effort**

## Configuration

- Add a Springer Nature token to Springer Online Journals Complete (**SOJ**) and/or database Springer Books (**SBO**) on the Database Details Page
- Database coverage must be set to “We only subscribe to some titles ...” or “Only Selected Titles”
- Token is obtained from Springer Nature:  
(<https://support.springernature.com/en/support/solutions/articles/6000232613-set-up-and-troubleshoot-kbart-automation>)

# Auto-Holdings Management: Springer Nature

More KBART Automation to Save 360/Intota Users Time & Effort

## Configuration

### 360 Client Center

**Custom Coverage Date From**  
**Custom Coverage Date To**  
**Public Database Note**  Display  
**Public All Titles Note**  Display

**Auto Holdings Settings**  
**Token** 4bKc5qOf1788XapS

### Intota

About \* Required Field

**Database Name \*** Springer Online Journals Complete

**Provider Name** Springer Nature

**Status** Subscribed

**OA Coverage** 16 %

**MARC Coverage** 94 %

**Title Coverage** ONLY SELECTED titles ALL titles

**Database Description**

**Long Database Description**

**Automate Holdings** Automatic Manual

**Token**

# Bulk Export Search Results

## HIGHLIGHTS:

- Introduce a new option in the user interface to support the bulk export of search results.
- Patrons can select to export search results in CSV/ Excel, formats.

## IMPACT:

Users can save and maintain a large literature review outside the context of Summon.

# Display Full Title When Mousing Over a Search Result

## HIGHLIGHTS:

Allows users on mobile devices or devices with small resolutions to view the entire title of a resource.

## IMPACT:

Provides clarity in search results to help identify useful content.

# Scrolling Improvements for Facets

## HIGHLIGHTS:

Allows users to page through search results rather than using the current “infinite scroll” method.

## IMPACT:

Complies with accessibility recommendations and provides a better user experience



# Replace Auto-scroll with Pagination

## HIGHLIGHTS:

- Currently facets are not visible or refinable if the user scrolls beyond the length of the facets pane.
- This feature will allow libraries to configure if the facets pane scrolls independently from results or is always visible.

## IMPACT:

Allows users to view and apply facets regardless of which search results they're viewing.

# Make Saved Items Permanent Once a User Authenticates

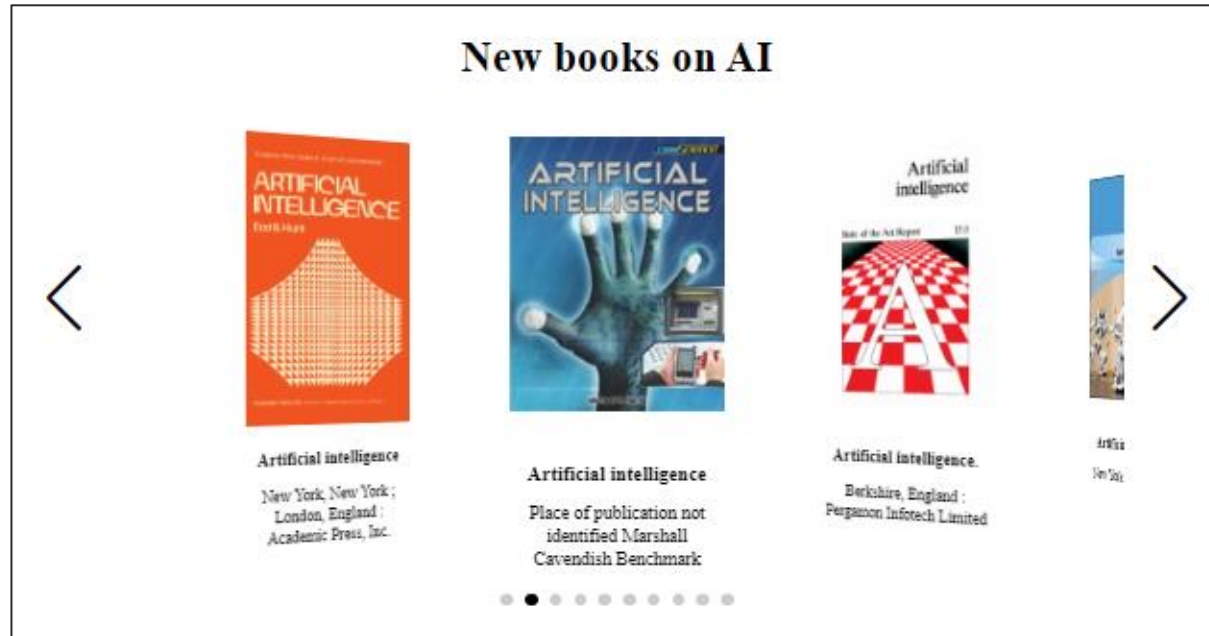
## HIGHLIGHTS:

Allow saved items to persist in the folder if a patron is authenticated, rather than deleting the saved items when the session ends.

## IMPACT:

Patrons can retain saved resources past the session timeout period as part of their research process.

# New Carousel Widget Embeds Summon Resources



# Open “Search within [journal]” in a New Browser Tab

## HIGHLIGHTS:

- Currently the “Search within [journal]” feature executes the new search in the same tab/window.
- This feature will open a new tab for the secondary search.

## IMPACT:

Users preserve the original search context and results

# Improved support for custom JS/CSS

## HIGHLIGHTS:

- Incorporate a custom JS/CSS field in the Summon Admin Console to directly enter a script or CSS.
- And/or upload a file

## IMPACT:

Summon administrators have easier configuration methods in Customizer.

# CDI Quality and Rights Processing Improvements

---

## 2024 Roadmap Highlights



CDI Subject Headings normalization and augmentation

---



Improve Book Review identification

---



Identify method(s) for distinguishing "In Press" content

---

# CDI Subject Normalization and Keyword Fields

## HIGHLIGHTS:

Extend normalization from topical to personal names and geographic names

## IMPACT:

Additional exploration paths for users via authorized vocabularies

# CDI Subject Headings Augmentation

Enrich CDI subjects with Personal & Geographic Name headings.

Title	Pierre Curie >
Creator	Curie, Marie >
Subject	Chemists > Biography > Physicists >

Title	Pierre Curie >
Creator	Curie, Marie >
Subject	Biography > Chemists > <b>Curie, Pierre, 1859-1906 &gt;</b> France > Physicists >

Mockup with Personal Name heading

Subject	Human Activities > Agriculture > Land cover > Physical geography > Environmental sciences > Urbanization > Global warming >
---------	---

Subject	Agriculture > <b>Aral Sea &gt;</b> Climate change > Driving factors >
---------	--

Mockup with Geographic Name heading



# Identify Methods for Distinguishing "In Press" Content

Increase communication around and/or linking accuracy to:  
In Press/Online First/Ahead of Print resources

- Individual providers make peer-reviewed, accepted articles available online but before they're in print or officially published
- May be accessible from the provider but not an aggregator
- Lack of enumeration/chronology prohibits standard linking
- We will do a thorough analysis to identify and handle early articles

# Improve Book Review Identification

- **Book Reviews** will be better differentiated from Articles
  - Accurate faceting & improved rankings
  - Easier for users to identify research content for inclusion and exclusion

# CDI Research Assistant

The screenshot shows the ExLibris CDI Research Assistant interface. At the top, there is a navigation bar with links for JOURNAL SEARCH, TAGS, LIBRARY SEARCH, ILL REQUEST, FETCH ITEM, BROWSESEARCH, and a menu. The main content area is titled "ExLibris" and includes a "BACK" button. A user question is entered in a text box: "What does theory of relativity mean". Below this, the AI-generated answer is displayed in a light blue box, providing a detailed explanation of the theory of relativity, including the special and general theories. To the right of the answer, there is a "Related Questions" section with a list of eight related topics. At the bottom of the interface, there is a "Supporting Articles" section with three numbered links. A "Next Chat Prompt" is visible at the bottom left, and a "Ask me anything" input field with a submit button is at the bottom right.

ExLibris

JOURNAL SEARCH TAGS LIBRARY SEARCH ILL REQUEST FETCH ITEM BROWSESEARCH ... Sign in Menu

← BACK

What does theory of relativity mean

The theory of relativity refers to a scientific theory developed by Albert Einstein. It encompasses two major theories: the special theory of relativity and the general theory of relativity.

The special theory of relativity, as explained in the search results, is based on the belief in the principle of relativity and the constancy of the velocity of light, regardless of the reference frame. This theory explores concepts such as the relativity of simultaneity, the concept of space-time, and the Lorentz transformations. It is designed to demystify relativity and is presented in a format that appeals to a youthful audience.

The general theory of relativity, on the other hand, extends the special theory to include the effects of gravity. It introduces the concept of curved space-time, where the presence of mass and energy curves the fabric of space and time, influencing the motion of objects. This theory provides a framework for understanding the behavior of massive objects, such as planets and stars, in the presence of gravity.

To learn more about the theory of relativity, you can explore the following resources:

- [1. An optical perspective on the theory of relativity -I: Basic concepts and the equivalence principle](#) - This article reviews the process by which Einstein founded the theory of relativity and explores the relationship between our new perspective and Einstein's perspective.
- [2. On the meaning of Einstein's relativity—Scientific review of and philosophical reflection on Einstein's theory of special relativity](#) - This study provides an extensive review of Einstein's theory of special relativity and discusses the philosophical and conceptual challenges associated with it.
- [3. Introduction to Einstein's Theory of Relativity](#) - This resource offers an introduction to Einstein's theory of relativity. These resources should provide you with a comprehensive understanding of the theory of relativity and its implications.

Related Questions

1. theory of relativity
2. Albert Einstein theory of relativity
3. Einstein's theory of relativity explained
4. Applications of theory of relativity
5. History of theory of relativity
6. Quantum theory of relativity
7. Black holes and theory of relativity
8. Space-time and theory of relativity

Ask me anything

User Question

AI Generated Answer

Supporting Articles

Next Chat Prompt

# Thank You

[Amy.Pemblem@clarivate.com](mailto:Amy.Pemblem@clarivate.com)