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# What's New in Summon & 360/Intota

February 2024 Release

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# Presented by:



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

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

A review of recent functionality,  
the February release and a  
sneak peek of 2024

# Agenda

- Review release calendar
- Review recent Summon, CDI, & 360 developments
- Highlight Summon February release features
- Highlight 360/Intota February release features
- Community engagement opportunities

# 2024 Release Dates for Summon and 360/Intota

<b>Quarterly Release Date</b>	<b>Preview Release Date</b>
February 7, 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

# Recent Summon, CDI and 360/Intota Enhancements

# Recent Accomplishments

- Add 5xx note fields to Quick Look [NERS](#)
- Normalized Subject Headings in CDI
- Ensure language parameter is passed from Summon to 360 Link [NERS](#)
- Better identification/communication of Scope Components
- Improve OA-handling, with the addition of Unpaywall as an indexed collection
- Prevent eBook and Computer File Records from Merging [NERS](#)
- Secondary resource types

- **Open Access Indicators in Management Reports**
- **Auto-holdings management with Taylor & Francis** [NERS](#)
- **Allow Login to Summon Usage Statistics from Intota**
- **Monthly linkers refinements & updates**
- **Data quality improvements & rights processing**
- **Ongoing accessibility improvements across all applications**

# What's New in the February Release

# 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

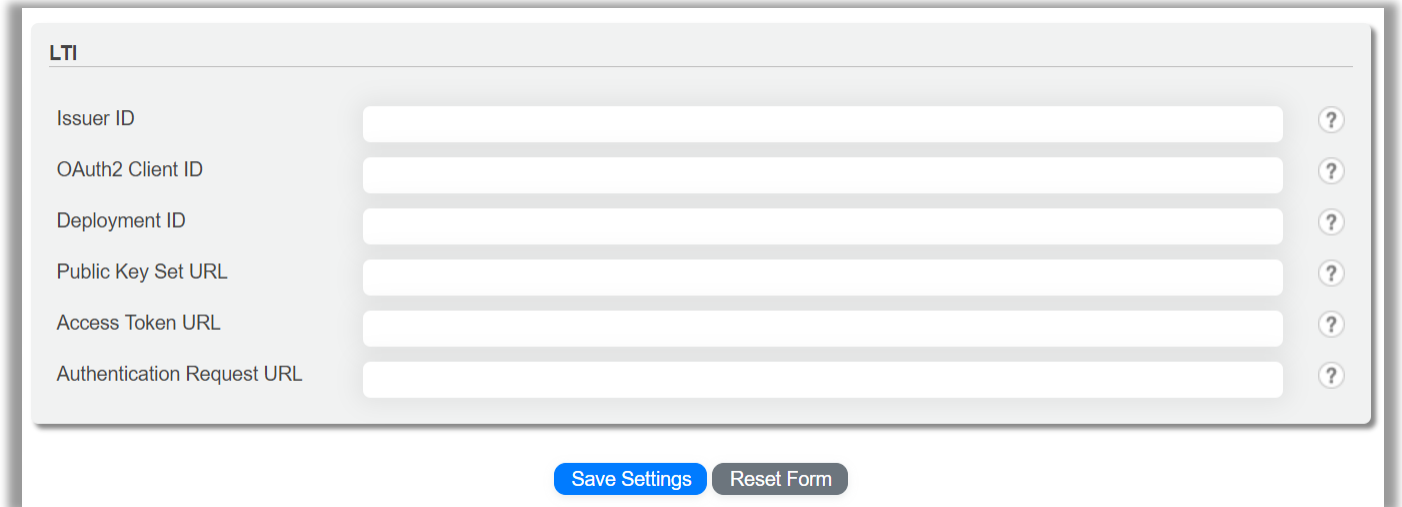
- LTI (Learning Tools Interoperability) is a standard used by LMS to talk to remote platforms
- The integration requires a “handshake” between systems so that users don’t have to authenticate in 2 different systems.
- Within Canvas
  - An **administrator** makes a Summon app available to course instructors
  - 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 a configuration form titled "LTI" with the following fields and buttons:

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

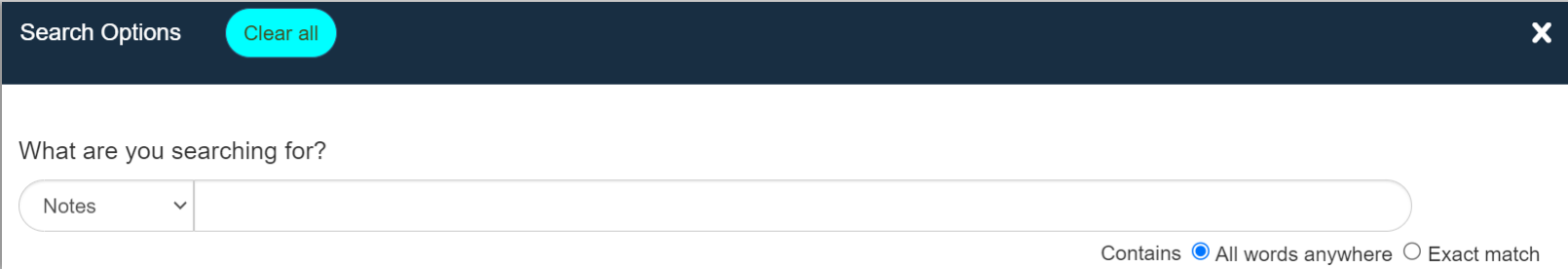
Buttons: Save Settings (blue), Reset Form (grey)

# 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 above a search input field. The input field has a dropdown menu on the left showing 'Notes' with a downward 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

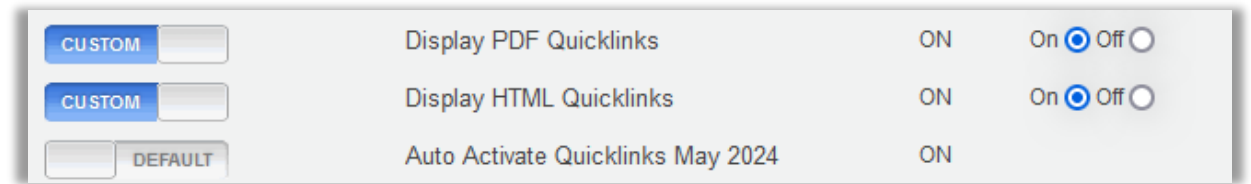
## Increase Linking Accuracy and Clarifying Access

### 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**

# 2024 Roadmap Sneak Peek

- Bulk export results list
- NERS candidates
  - Give some Ahead of Print citations in Summon a status of Citation Online
  - Make the Saved items folder permanent when authenticated
  - Change the order of the content types on the left sidebar of the results page
  - Full title of search result on mouseover
  - Facet scrolling improvements
- LTI refinements
- Normalized Subject Headings refinements
- Better identification of Book Reviews
- Improve OA handling

# Upcoming Community Events

- 2024 Summon & 360/Intota Roadmap Webinars
  - APAC: Tuesday, February 13, 2024 4:00 PM | (UTC-08:00) Pacific Time (US & Canada): [Register](#)
  - Americas + EMEA: Wednesday, February 14, 2024 6:00 AM | (UTC-08:00) Pacific Time (US & Canada): [Register](#)
- ELUNA Annual Meeting May 14 -17
- IGeLU Annual Meeting September 9 - 12



# Thank You

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