Best Practices for Customizing Summon

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ExLibris
a ProQuest Company

Introductions

- **Alice Tsoi**

Alice has been with ProQuest for five years. She is the 360 Link product support lead and also supports Summon and Ulrichsweb. She is currently learning SFX. Previously, she worked at the University of Washington as a graduate assistant and as a consultant for the Housing Development Consortium in Seattle. She has degrees in Library and Information Science and Public Administration, both from the University of Washington.

- **Elizabeth Farrell**

Elizabeth has been with ProQuest for over a year as a member of the SerialsSolutions/Workflow Solutions Support team. With a background in music librarianship and an MLIS from the University of Washington, Elizabeth enjoys working with libraries to make their data and collections discoverable and easily accessible. Elizabeth is a Pacific Northwest native and currently calls Seattle home.

2
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Objectives and Target Audience

- What aspects of Summon can be customized?

- By the end of this sessions you will know, understand and/or be able to:
  - Navigate the Summon Administration Console
  - Know what's possible to customize
  - Tips and tricks

- Session Target Audience:
  - New to Summon
  - Systems or Discovery Services Librarians
  - Summon Administrators

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Agenda

1   **Introduction to the Summon Administration Console**

2   **Look & Feel**

3   **Integrated Content & Citation Tools**

4   **Linking out to Content and putting Summon out there**

5   **Next Steps, Support Resources and Survey**

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Summon Administration Console via Intota

5

Summon Administration Console via Client Center

6

Summon Administration Console Tabs

- **Settings:** Customize the look, feel, and behavior of your Summon service.

- **Mapping:** See a read-only view of your catalog mappings.

- **Detail Page:** Turn on the optional display of your catalog records within Summon.

- **Usage:** Explore Summon Usage Reports.

- **Translations:** Customize text in Summon's 34 languages, including English.

- **Recommender:** Configure database recommendations and create Best Bets.

7

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Using the Administration Console

Summon™ Editor — SETTINGS   MAPPING   DETAIL PAGE
USAGE   TRANSLATIONS   RECOMMENDER
Hello, sharai.proquest@gmail.com (Sign Out)

Settings

General

CUSTOM	Page Title	Summon @ ProQuest Training University Library	?
CUSTOM	Home Link	http://www.proquest.com/en-US/	?
CUSTOM	Feedback Email Address	librarian@university.edu	?
DEFAULT	Feedback Client Email Required	OFF	?
DEFAULT	Feedback Link		?
DEFAULT	About Link		?
DEFAULT	Help Link		?
DEFAULT	Autocomplete Enabled	ON	?
DEFAULT	Query Suggestions Enabled	ON	?
DEFAULT	Call Numbers Enabled (Availability)	OFF	?
DEFAULT	Dewey Numbers Enabled (Availability)	OFF	?
DEFAULT	Call Numbers Enabled (Preview)	ON	?
DEFAULT	Dewey Numbers Enabled (Preview)	OFF	?
DEFAULT	Display Call Numbers if Availability fails	ON	?
DEFAULT	Display Dewey Numbers if Availability fails	OFF	?
	Disable OneClick for IE	OFF On ○ Off ●	?
DEFAULT	Google Analytics Tracking Code		?

8

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Spruce up Logos and Header Links

Favicon

Page Title

results for "adhd" - 9

training.summon.serialssolutions.com/#!/search?ho=t&fvf=IsPeerReviewed,true,f&l=en&q=adhd

"Elizabeth"

A-Z List Feedback Help

Summon   adhd   Q   Advanced+

Clear Filters

126,434 results sorted by relevance +

☐ Add results beyond your library's collection

REFINEMENTS

including "attention deficit hyperactivity disorder"

Full Text Online

Just search adhd

Scholarly & Peer-Review

Peer-Review ✓

Database Recommendations

Library Catalog

worldwide, including Open Access journals

Custom Link can be text or an image.

CONTENT TYPE

Journal Article (123,84...

Small Logo

s, evaluation, **disorder** in...

Book Review (5,916)

Trade Publication Artic...

A **Large Logo** goes on the home page. Both logos can be hyperlinked.

Conference Proceeding (4...

Book Chapter (407)

More...

Attention-deficit hyperactivity disorder (ADHD) is the most common neurobehavioral **disorder** of childhood and can profoundly affect the academic achievement, well-being, and social interactions of children...

PUBLICATION DATE

Journal Article: Citation Online

WEB OF SCIENCE 373

SCOPUS 79

Preview +

from   to

2   The Worldwide Prevalence of **ADHD**: A Systematic Review and Metaregression Analysis
by Polanczyk, Guilherme; de Lima, Mauricio Silva; Rohde, Luis Augusto; More...

Last 12 Months
Last 3 years
Last 5 years

American Journal of Psychiatry, 06/2007, Volume 164, Issue 6

Objective: The worldwide prevalence estimates of **attention deficit hyperactivity disorder** (ADHD...

DISCIPLINE

Journal Article: Full Text Online

WEB OF SCIENCE 1,599

medicine (67,868)

Preview +

psychology (28,339)

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5

Settings for Logos and Header Links

Remember to add a **Feedback Email Address**.

About link retired in Summon 2.0.

Sizing is important for the **Small Logo**. (183 x 32)

Scroll toward bottom of page to find **Custom Link** section. Use it for anything you like

11

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Offer Users a World of Languages

Enable up to 34 **Languages** for your users.

Let Summon pick the language based on the user's browser settings.

Or, add a default language to your Summon URL, such as this for Canadian French:
http://*[library]*.summon.serialssolutions.com/fr-CA/

12

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Customize Text to Reflect Your Library's Character

Before:

REFINE YOUR SEARCH
- ✔ Any
- Full Text Online
- Scholarly & Peer-Review
- Peer-Review
- Library Catalog

After:

REFINEMENTS
- ✔ Any
- Full Text Online
- Scholarly & Peer-Review
- Peer-Review
- Library Catalog

Summon™ Editor   SETTINGS   MAPPING   DETAIL PAGE   USAGE   (Sign Out)
TRANSLATIONS   RECOMMENDER

Translations for
English

Filter: refine

Use **Translations** tab to customize your text!

Phrase	Tr
Keep search refinements	Ke
Keep search refineme	
Refine Search	Re
Refine your search	Re

Filter to find text to translate.

Edit Translation   X

Phrase
Refine your search

Translation
Refinements

Update

Click to Edit text.

Edit
Edit
Edit
Edit

13

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Color Your Summon

Off Campus? Log in here to access full text and more content.

Summon·   non-newtonian fluids

Authentication banner shows for off-campus users.

Make it pop!

65,596 results sorted by relevance ▾

☐ Add results beyond your library's collection

REFINEMENTS
Full Text Online
Scholarly & Peer-Review
Peer-Review
Library Catalog

CONTENT TYPE
Journal Article (47,159) ✖

1   Mechanics of **non-Newtonian fluids**
by Schowalter, William Raymond, 1929
1978, 1st ed.
Book: Check Availability, QC189.5 .S36
Preview ▾

Primary Link Color can be changed to match your color scheme.

2   online   Codimensional **non-Newtonian fl...**
by Zhu, Bo; Lee, Minjae; Quigley, Ed; More
ACM Transactions on Graphics (TOG), 07/2015, Volume 34, Issue 4
We present a novel method to simulate codimensional **non-Newtonian fluids** on simplicial complexes...
Journal Article: Full Text Online
Preview ▾

Summon 2.0 Customization			
CUSTOM	Enable Custom Colors	ON	On ◉ Off ◯
CUSTOM	Primary Link Color	#7E218F	
DEFAULT	Primary Link Color (visited)	#0088cc	
DEFAULT	Primary Link Color (hover/active)	#005580	
DEFAULT	Secondary Link Color	#333333	
DEFAULT	Secondary Link Color (visited)	#333333	

Summon 2.0 External Script
DEFAULT   Custom Script Url

Electrokinetics of **non-Newtonian fluids**: a review
by Zhao, Cunlu
Advances in coll
This work prese
pertaining to **no**
Journal Article:

Write your own script?

Link to your file in the **Summon 2.0 External Script** section.

Need help with colors? Try HTML Color Picker - W3Schools

14

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Authentication Banner Tip

Leave the Banner URL blank. Summon uses the Proxy URL from your Client Center or Intota "Library Settings" area!

Choose Refinement Options to Display

Configurable options.

Choose Advanced Search Options to Display

For the best user experience, make these **Advanced Search** options match the ones available in **Refine Your Search**.

Fine Tune Your Facets

Contextual Facets appear ONLY for books and catalog items.

Select and reorder facets.

Whitelist makes a location appear among top five values.

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Add Syndetic Images and Content

Cover images

Additional author & content details

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Syndetics Unbound

Enable Altmetric Integration

- Metrics about an article's impact as expressed through online, social media and news mentions.

- Free version available to all Summon libraries.

Control Your Topic Explorer Sources

Sources:
- Credo Reference
- Encyclopedia Britannica
- Gale Virtual Reference Library
- Wikipedia
- JapanKnowledge

Contact us to request changes in the precedence of your **Topic** sources.

23

Integrate with ProQuest's "New" RefWorks

Users can log in and save citations directly to the **"New" RefWorks**.

Users are prompted users to create a free **"New" Refworks** account if not logged in.

If your library subscribes to Legacy RefWorks, consider turning off integration with the **"New" RefWorks**.

24

Select Citation Styles to Offer

Disable citation styles not needed by your users.

Set inactivity timeout (in minutes).

Enable Export to the ProQuest SIPX Reading List Module

- Make it easy for faculty to discover, set up, and assign course readings.

Activate SIPX menu item.

Activate SIPX button.

Integrated Chat

- Works with LibraryH3lp, SpringShare, or Question Point

Click to chat with a Librarian.

27

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28

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Database Recommendations

Customize your **Database Names** and **Descriptions** using the **Database Details** page.

Two recommendation engines:
- Algorithm based
  - Metadata driven
  - Purely automatic
- Tag based
  - Add your own tags
  - Block community tags
  - Exclude a database from tagging

29

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Recommender: Tag Your Databases

Edit tags or turn off tagging for individual databases.

Block community tags.

Add your own tags.

30

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Make Anything a Best Bet!

| library hours | 🔍 Advanced▾ |

7,945,396 results sorted by relevance ▾ 🔊 ☐ Add results beyond your library's collection

➜ **Library Hours**

Library hours have been expanded!

| family history| | 🔍 Advanced▾ |

12,379,401 results sorted by relevance ▾ 🔊 ☐ Add results beyond your library's collection

➜ **Researching genealogy?**

Visit our *Genealogy and Family History Research Center* for information and tools to help you get started or dig deeper into your research.

| career center |

8,523,867 results sorted by relevance ▾ 🔊

➜ **Resume Help?**

Drop in at the Career Center for resume tips and tricks. Or, schedule an appointment for a full resume review.

| | 🔍 Advanced▾ |

372,403 results sorted by relevance ▾ 🔊 ☐ Add results beyond your library's collection

➜ **Campus Health Center**

Need a flu shot? Runnng a fever and don't know where to go? Call the Campus Health Center at 555-555-5555 to make an appointment today.

31

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Recommender: Create and Edit a Best Bet

Summon™ Editor   SETTINGS   DETAIL PAGE   USAGE
     TRANSLATIONS   RECOMMENDER

DATABASES   BEST BETS

Best Bets

Create Best Bet

| Researching Genealogy? |

Check out our Genealogy study guide for ideas on how to ge
or dig deeper into your research.

Bulk Best Bets Importer

Browse... No file selected.   Import

Create and Save a Best Bet.

B *I* | ☰ ☰ | ✂ 🗐 📋 | ↺ ↻

http://proquest.libguides.com/genealogy_home

Save or Reset

Researching Genealogy?
Check out our Genealogy study guide for ideas on how to get started or dig deeper into your research.

http://proquest.libguides.com/genealogy_home

Edit Best Bet   Remove Best Bet

Tags: genealogy x   geneology x

Add tag...   Add

☐ Mark for Bulk Delete

Edit or remove a Best Bet.

ⓘ Only one Best Bet will display per tag. So, **do not reuse tags**.

Add as many tags as you like. Search term(s) must match perfectly.

32

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16

Your Summon Catalog Detail Page

1 **Wind power**
by Musgrove, Peter
2010
Book: Check Availability, TJ828 .M875 2010

Two options for catalog records:
1. Link to catalog from results page
2. Link to **Summon Catalog Detail** page

A-Z List Feedback Help

Summon   wind power   🔍 Advanced▾

‹ Back to search results   View in classic catalog ›

Wind power
by Musgrove, Peter
2010
Book: Check Availability, TJ828 .M875 2010

Check for Print Copy
Request via Interlibrary Loan

Catalog Detail page integrates with **Syndetics** content.

Summary
Climate change caus... ...es make the further rapid development of renewable energy sources a global imperative. Energy provided by wind power, though no panacea, has the potential to make a substantial c... and accessible account of the history and future development of wind power technology offer... and all readers interested in wind power. Requiring no prior technical knowledge, this (...read

Even If you choose linking to catalog, you can use the **Summon Catalog Detail** page during catalog maintenance.

Choice Review
Musgrove (retired; formerly, Univ. of Reading and head of development, National Wind Power... book with a succinct introduction providing context to the field. The author then generates a ti...

33   **ExLibris**

Catalog Detail Page

A-Z List Feedback Help

Summon   wind power   🔍 Advanced▾

‹ Back to search results   View in classic catalog ›

Wind power
by Musgrove, Peter
2010
Book: Check Availability, TJ828 .M875 2010

Reserve
Request

Two buttons, independently available:
- **Reserve** (opens catalog to this item)
- **Request** (opens Interlibary Loan system with this item)

Custom text ideas:

Check for Print Copy
Request via Interlibrary Loan

Note: Same **Request** (ILL) button is on the **Abstracting and Indexing Detail** page, described later.

34   **ExLibris**

Turn On Catalog Detail Page (and Request button for A&I)

- Enable your Catalog Detail page.

- Enable catalog "Reserve" button.

- Enable Interlibrary Loan "Request" button for both your Catalog Details and A&I Details pages.

  URL can be anything that supports OpenURL; for example, your link-resolver.

- Add any desired custom text.

- Choose and order sections of additional content.

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MARC and Location Mappings

Read-only view of certain MARC mappings.

Need to make changes?

Download and edit your mappings in Excel. Remember to highlight your edits before you send them to the ProQuest Support Team.

Read-only view of library location mappings.

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Mapped Call Number Settings

Predictably irrational: the hidden forces that shape our decisions
by Ariely, Dan

2008, 1st ed.

This evaluation of the sources of illogical decisions explores the reasons why **irrational** thought often overcomes level-headed practices, offering insight into the structural patterns that cause...

Book: On Loan, BF448 .A75 2008, KOERNER LIBRARY stacks

Predictably irrational: the hidden forces that shape our decisions
by Ariely, Dan

2008, 1st ed.

This evaluation of the sources of illogical decisions explores the reasons why **irrational** thought often overcomes level-headed practices, offering insight into the structural patterns that cause...

Book: Check Availability, 330 A698p

Settings

General

DEFAULT	Call Numbers Enabled (Availability)	OFF	
DEFAULT	Dewey Numbers Enabled (Availability)	OFF	
DEFAULT	Call Numbers Enabled (Preview)	ON	
DEFAULT	Dewey Numbers Enabled (Preview)	OFF	
DEFAULT	Display Call Numbers if Availability fails	ON	
DEFAULT	Display Dewey Numbers if Availability fails	OFF	

Want to Hide "Citation Online" A&I Content?

Comparison of PubMed, Scopus, Web of Science, and Google Scholar: Strengths and weaknesses
by Falagas, Matthew E; Pitsouni, Eleni I; Malietzis, George A; More...

FASEB Journal, 02/2008, Volume 22, Issue 2

... We compared the content coverage and practical utility of PubMed, Scopus, **Web of Science**, and Google Scholar...

Journal Article: Citation Online

WEB OF SCIENCE™ 401   SCOPUS™ 164

Preview ▾

- You can exclude "Citation Online" content from search results.
- Setting takes effect in 1-2 index updates.

Web of Science, Scopus and Google Scholar A content comprehensiveness comparison
by Adriaanse, LS; Rensleigh, C

ELECTRONIC LIBRARY, 2013, Volume 31, Issue 6

... resources ISI **Web of Science**, Scopus and Google Scholar. Design/methodology/approach - The research, the first phase of a longitudinal study, used a comparative research design method with a purposive, non-probability sample...

Journal Article: Full Text Online

WEB OF SCIENCE™ 21

Preview ▾

Settings

General

CUSTOM	Page Title Results	This text appears in br...
	Exclude Citation Online Content	ON On ⦿ Off ◯

Choose the approach that meets your users' needs.

- Excluded content shows when user checks the **Add results beyond your library's collection** box.

1,116,232 results sorted by relevance ▾ 🔊   ☑ **Add results beyond your library's collection**

Abstracting & Indexing Detail Page

- Enable ILL **Request** button so the patron knows what to do next.
- Controlled by same settings as the **Request** button on Catalog Detail page.

Abstracting & Indexing Detail Page w/ Catalog Record

To find Get Journal Article on the translations tab, search for:

Get %(type)

Primary Action: orange button links to catalog.
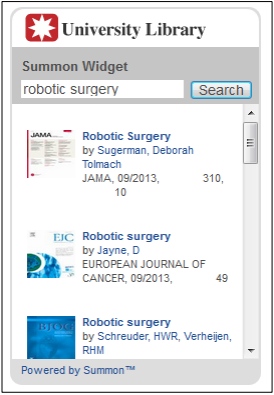
→ Custom button text ideas:

Check Catalog for Print

or

Find Print Version

→ Custom note text idea:

Note: Full-text of this item is not available online. Use the buttons to the right to find the item in print or request it via Interlibrary Loan.

Can change **Primary Action** so Request (ILL) button is orange and on top.
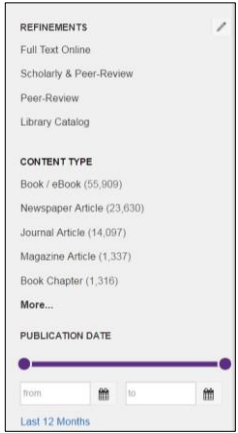
Create Search Widgets and Search Boxes

Interactive Search Widget.

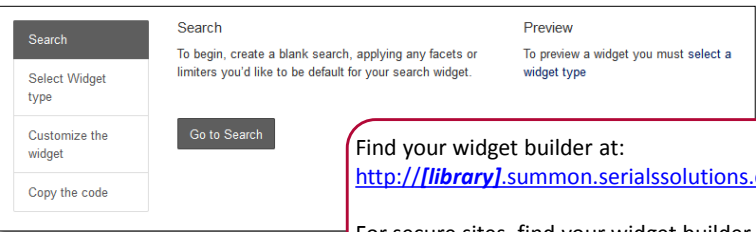If you can copy & paste, you can put a search box or widget on any web page!

Compact Search Box.

Use facets and refinements to pre-scope your search box or widget.

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Step by Step

Search

Select Widget type

Customize the widget

Copy the code

Search
To begin, create a blank search, applying any facets or limiters you'd like to be default for your search widget.

Preview
To preview a widget you must select a widget type

Go to Search
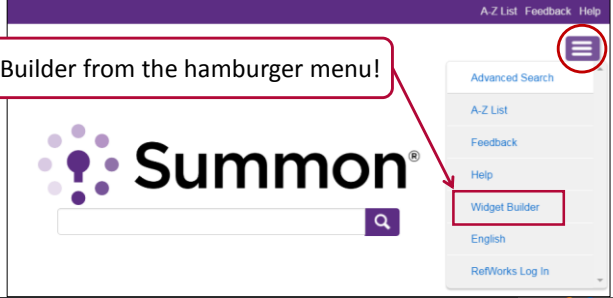
Find your widget builder at:
http://*[library]*.summon.serialssolutions.com/widgets

For secure sites, find your widget builder at:
https://*[library]*.summon.serialssolutions.com/widgets

OR navigate to the Widget Builder from the hamburger menu!

A-Z List Feedback Help

Advanced Search
A-Z List
Feedback
Help
Widget Builder
English
RefWorks Log In

Summon®

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Add a Summon Search Box to Library Home Page

Search the library's resources with Summon...

[ ] search

find: ◉ everything ○ books ○ articles

A-Z list of electronic resources | A-Z list of journals | advanced search

☰ **UNIVERSITY LIBRARIES**

Find articles, books, & more | Find It!

OneSearch | CardCat | Databases | e-Journ...

Find Articles, Books, Music, DVDs, and More

OneSearch Search Everything... | Search

Include in results: ☐ Book reviews | About OneSearch | Advanced Search

LIBRARY **QUICK SEARCH**

Find journal articles, books, movies, and more!

keywords | SEARCH

What is this? · Advanced Search

43

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Agenda

1 Introduction to the Summon Administration Console

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44

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Want More Ideas?

- **From Other Libraries Using Summon**
  - Summon listserv: Lively email conversations among over 500 Summon libraries in more than 40 countries

- **From Ex Libris & ProQuest:**
  - Summon Essentials: Training videos covering the basics of using, configuring, and customizing Summon
  - Summon Extended Training: Dive deeper into Summon, including MARC mappings, usage reports, and more.
  - Knowledge Center: Documentation, links to videos, access to the Support team, and more!

- Technical Seminar Presentations
  (located in the Cross-Product section of the CKC)

45 **ExLibris**

Q & A

Any Questions?

46 **ExLibris**

Session Survey Evaluation

Please use the following link to provide feedback on your sessions:

https://www.surveymonkey.com/r/techsem2017

47

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THANK YOU

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