



Best Practices and Q&A for the Ex Libris Community During COVID-19

Summon and 360 services

Amy Pemble and Brent Cook

Overview

- The current global situation is forcing staff at libraries and higher education institutions to rethink how they operate; how to manage their daily tasks in the most efficient way possible, while working remotely
- In this webinar we will try to answer your questions and share tips on how to operate during this challenging time

Fee free to send us additional questions during this webinar using the Q&A



Key Ex Libris COVID-19 Related Resources

- [Ex Libris Trust Center](#)
 - [Ex Libris Statement Regarding Coronavirus \(COVID-19\)](#)
- [Best Practices for the Ex Libris Community During COVID-19](#)

Ex Libris Knowledge Center
a ProQuest Company

Search under current path

Home » Cross-Product » Security » Policies » Ex Libris Statement Regarding Coronavirus (COVID-19)

Ex Libris Statement Regarding Coronavirus (COVID-19)

Updated March 22, 2020

We continue to monitor the spread of the novel coronavirus (COVID-19) and its employees, and partners regarding our status and the actions that we are taking.

Ex Libris' Business Continuity Management (BCM) team has activated our well-defined Continuity Plan includes a focus on:

Ex Libris Knowledge Center
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Home » Cross-Product » Best Practices for the Ex Libris Community During COVID-19

Best Practices for the Ex Libris Community During COVID-19

We are here to help!

Ex Libris is constantly monitoring the impact of the novel coronavirus COVID-19. You can follow updates on our Trust Center page.

The current global situation is forcing staff at libraries and higher education institutions to rethink how they operate, how to manage their daily tasks in the most efficient way possible, while working remotely.

Do you have a question? We understand that you might be facing a variety of challenges. **We're here to help!**

Send us your questions, your requests for information. We will address these in a series of webinars, recordings and articles that we will start publishing in the coming days. (Stay tuned for more information).

For now, you are welcome to post your questions that you want us to address during these planned webinars.

[Submit Your Question](#)

(For support issues, contact Ex Libris support in the regular channels).

Please scroll down for more product information.

All conference services are experiencing overloads as many people around the world are using them for virtual communication. We plan to record all webinars. In addition, if we encounter difficulties in broadcasting these webinars live, we will record them and make them available.

Upcoming webinars schedule

Product	APAC (Tokyo Time)	Registration Link	Americas (EST/ET New York/London Time)	Registration Link	Duration
Recoita	N/A	N/A	23/3: 12:30-14:30	Register	30
Alma & Primo	23/3: 16:00	N/A	23/3: 11:30-13:00	Register	60
RefWorks	24/3: 15:00	Register	24/3: 11:30-13:00	Register	30
Research Professional	24/3: 16:00	Register	24/3: 12:30-14:30	Register	30
Leganto	25/3: 11:00	Register	24/3: 10:00-14:00	Register	30
campusM	25/3: 16:00	Register	25/3: 12:30-14:30	Register	30
Primo	26/3: 08:00	Register	25/3: 10:00-14:00	Register	30
Summon and 360	27/3: 08:30	Register	26/3: 11:30-13:00	Register	30
RegiURL	27/3: 10:00	Register	26/3: 12:30-14:00	Register	30

Alma and Primo

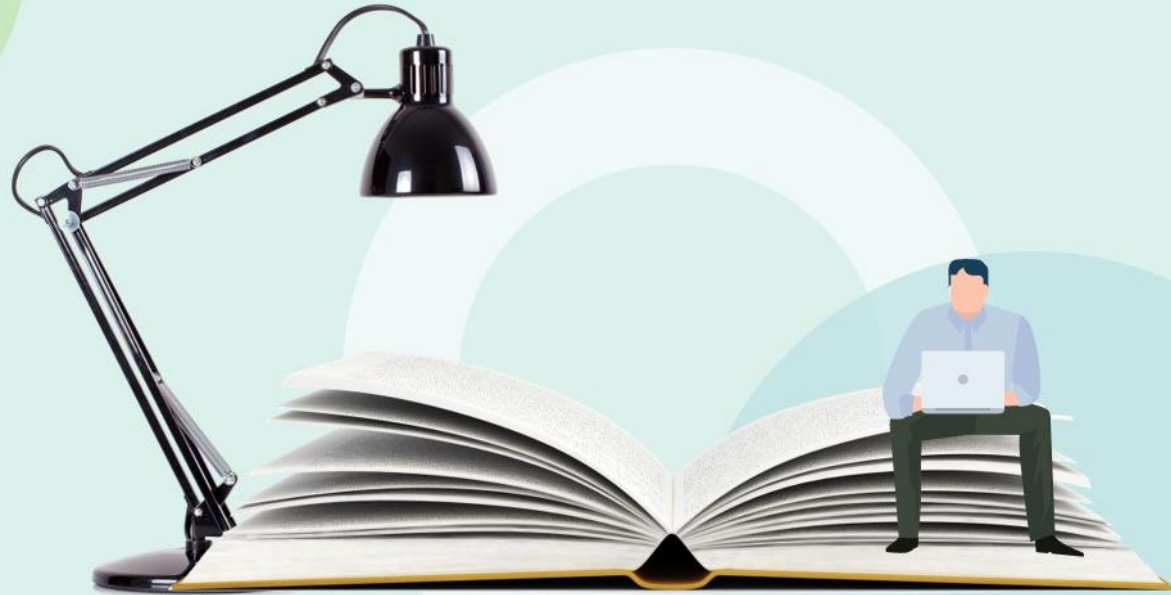
- Documents and Presentations
- Recordings
- Q&A

Content

- Documents and Presentations
- Recordings
- Q&A

campusM

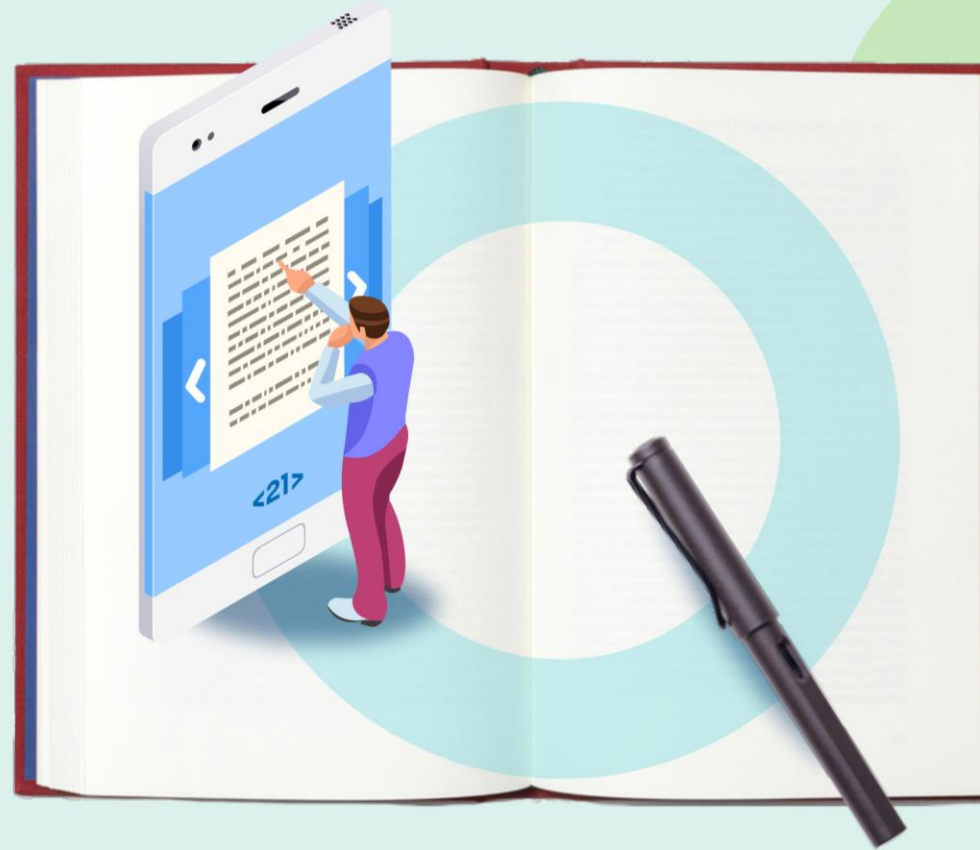
- Documents and Presentations
- Recordings
- Q&A



Content

Summarizing multiple questions on these two topics –

- How will Ex Libris handle content that providers have made temporarily freely available during this time?
- How will Ex Libris make accessible the new COVID-19 content resources published by providers?



Answers

List of content that is currently freely available and of COVID-19 resources, as well as resources being made available on Ex Libris products:

See shared article for [Alma](#), [SFX](#), [360KB](#), Primo ([CDI](#)/[PCI](#)) and [Summon](#)

In these rapidly changing times, we are still considering options how best to address these and other questions

- How do we identify which providers are making this content available?
- Will the full existing collections be free? Will new collections be created?

First and foremost, we will be proactively reaching out to our providers and inquiring into their status

Some options we are examining:

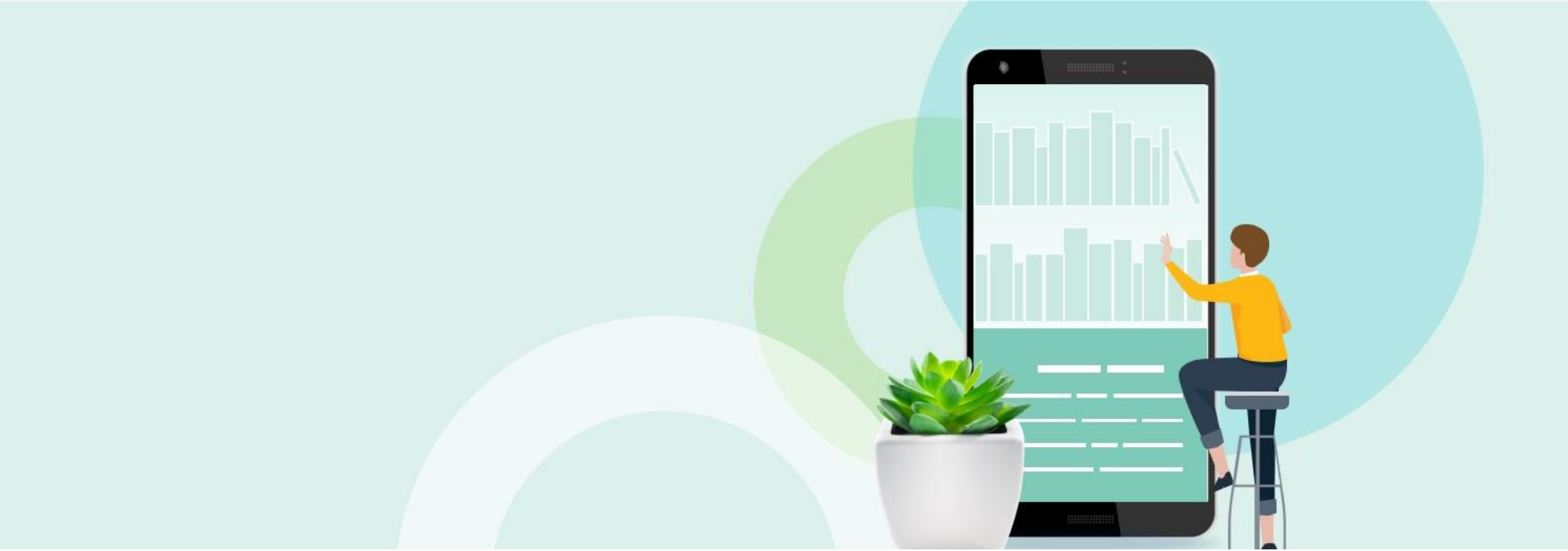
- Ingesting new COVID-19 resources that we are aware of
- Ingesting new OA/free collections
- Showing how to temporarily activate content (in Alma CZ)
- Indicating collections are free/OA?

Additional considerations include:

- What will happen when access is removed?
- Manual activations and deactivations will be required

Additional Information

- Materials we will be making available to support our community:
 - Articles on [simple and advanced search](#) – for students and librarians
 - Tips and tricks for [searching for COVID-19 content](#)
- Updates on our next steps will be published and announced via the listservs and the [Best Practices](#) CKC article



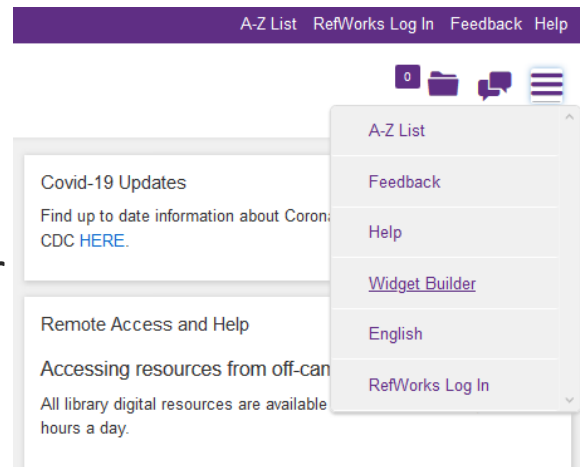
General Questions



How do I direct my patrons to search electronic materials by default in Summon?

Answer

- Use the Widget Builder to create a search box limited to Full Text Online
 - Go to the Widget Builder under the hamburger menu in the upper righthand corner of the result page
 - Follow the steps and select Full Text Only under Refine Your Search in the Facet Pane
 - Use the code generated by this process and replace any existing search boxes on your site
 - Users can easily clear this facet if they want to see physical items as well





Please tell us about the state of ELUNA. Will it be cancelled, held online, or rescheduled?

Answer

- ELUNA is currently researching options and should have an update in the next few weeks.



Will Ex Libris be reviewing their release schedule given that support for any issues/bugs introduced will be severely reduced onsite at libraries?

Answer

- The 360/Intota Services May release will be scaled back so that no potential interruptions to services or access are at risk.
- We will skip the April Maintenance Release for Summon and will also review the May release to reduce risk as well.



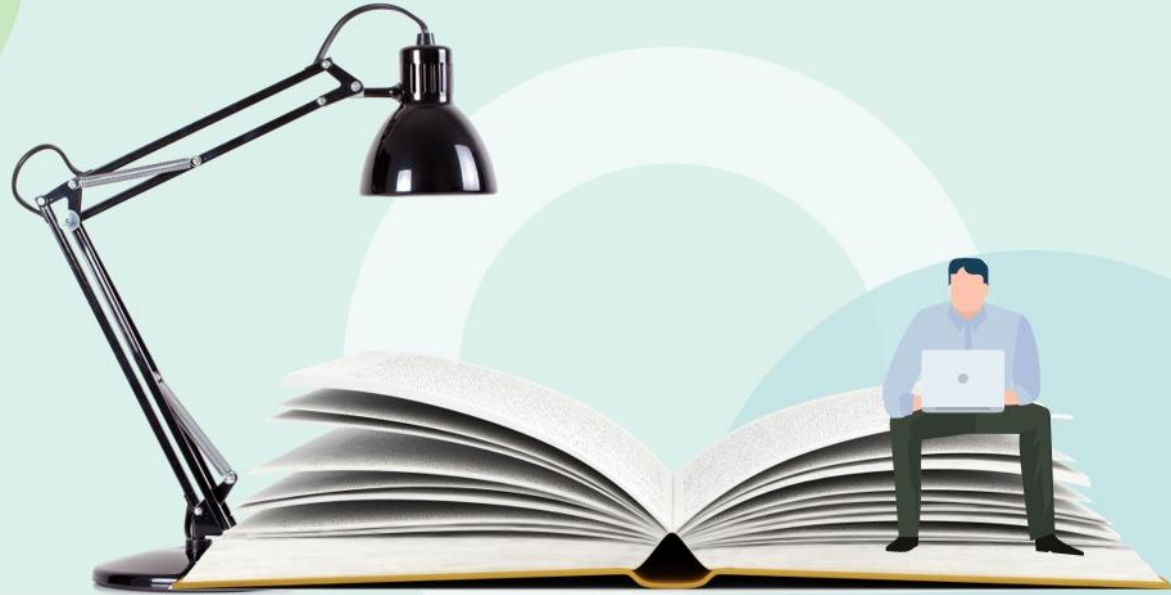
Both through our consortium and via library subscriptions, a number of vendors are offering temporary expanded access to online content. I am interested in best practices for adding temporary resources, and turning them off when (assuming) our access to content returns to "normal": i.e., we no longer have access to huge swaths, but just the titles/sub-databases we subscribe to

Answer

- Scenario: Adding a new collection
 - Subscribe to the new package and adjust “Display In” settings
 - RM/Intota option: use a custom status to distinguish them from licensed content or create a new collection
 - RM/Intota option: create a \$0 payment record with a termination date reflecting when access will end and set up an alert to remind
- Ensure access
 - Proxy server
 - Does the vendor have your campus IPs?
 - Does the collection need special configuration?

Answer

- Scenario: Adding titles to an existing collection
 - Back up your current title selections! Download the titles list
 - Subscribe to desired titles
 - RM/Intota option: use a custom status to distinguish them from licensed content
 - RM/Intota option: create a \$0 payment record with a termination date reflecting when access will end and set up an alert to remind staff
 - When access ends, upload the titles list



Additional Tips / Best Practices

Summon Tips Resources

- Access
 - [Summon: Authentication Banner for Remote Users](#)
 - [Summon: Remote Authentication Methods](#)
 - [Authentication in Summon Training Video](#)
 - [Configuring the Authentication Banner](#)
- Communication/Engagement
 - [Custom Panel Configuration](#)
 - [What kinds of things can a library put in Summon Custom Panels?](#)
 - [Configuring Chat Widgets](#)
- Integration
 - [Search Boxes and Search Widgets](#)
 - [Create a Search Box](#)

Chat in Summon

- Remember you can include chat on Summon results pages
- Configuration can be found in the Admin Console under Settings > Chat

Summon™ Editor SETTINGS MAPPING PAGES USAGE TRANSLATIONS RECOMMENDER CONTENT INGESTION

Settings

General

Search Results

Logos

Authentication

Facets

Languages

Participant Record Prioritization

Citation Formats

Refworks

Syndetics

Spotlighting

Advanced Search

Refine Your Search

Custom Link

Topics

Resource Link Prioritization

Transliteration (880 Fields)

Configuration (read only)

A&I Detail Page

Chat

Chat

☐ CUSTOM ☐ Enable LibraryH3lp Chat Widget ON On ☒ Off ☐

☐ CUSTOM ☐ LibraryH3lp Queue serials-solutions@chat.sg.libraryh3lp.com

☐ DEFAULT ☐ LibraryH3lp Skin


☐ CUSTOM ☐ Enable SpringShare Chat Widget ON On ☒ Off ☐


☐ CUSTOM ☐ SpringShare IID 1

☐ CUSTOM ☐ SpringShare Key 618c19a7727b355

☐ CUSTOM ☐ SpringShare Domain demo.libanswers.com

☐ DEFAULT ☐ Widget Location top

☐ DEFAULT ☐ Widget Online Image 

☐ DEFAULT ☐ Widget Offline Image 

☐ CUSTOM ☐ Widget Email Address randy.acker@proquest.com

☐ DEFAULT ☐ Enable SpringShare V2 Chat Widget OFF

☐ DEFAULT ☐ SpringShare V2 Element ID

☐ DEFAULT ☐ SpringShare V2 Script Source URL

☐ DEFAULT ☐ Enable Question Point Qwidget OFF

☐ DEFAULT ☐ Question Point Qwidget Skin

☐ DEFAULT ☐ Question Point Qwidget Instid

Custom Panels

- You can provide critical information and updates via Custom Panels.
- You'll find the settings in the Admin Console under Pages > Custom Panel Sections.
- Be sure to check the Persistent box at the bottom of the form to ensure the panel appears on the Summonresults page at all times.

The screenshot shows the 'Custom Panel Sections' configuration page in the Summon™ Editor. The top navigation bar includes 'SETTINGS', 'MAPPING', 'PAGES', 'USAGE', 'TRANSLATIONS', 'RECOMMENDER', and 'CONTENT INGESTION'. The 'PAGES' tab is active, and the 'CUSTOM PANEL SECTIONS' sub-tab is selected. The main content area is titled 'Custom Panel Sections' and contains the following elements:

- Add New Section:** A form with a 'Section Heading' input field, a 'Bulk Section Importer' section with 'Browse...' and 'Import' buttons, and a 'CSV Structure' field showing a template: `<title>,<content>,<isDisabled>,<isPersistent>,<tag1>,<tag2>,<tag3>`. A 'Download sample file' link is also present.
- Formatting Tools:** A toolbar with 'File', 'Edit', 'View', 'Format', and 'Tools' menus, and a 'Formats' dropdown. Below the toolbar are icons for undo, redo, bold, italic, text color, background color, and list creation.
- Options:** Checkboxes for 'Disabled' and 'Persistent', and 'Save' or 'Reset' buttons.
- Existing Sections:** A table listing existing sections with a 'Bulk Delete' button and a 'Reset' link.
- Section Preview:** A preview of the 'Remote Access and Help' section, showing the text: 'Accessing resources from off-campus. All library digital resources are available both on and off-campus, 24 hours a day. On campus: no log-in required. Off-campus: when opening a database, e-book, or other resource, you'll be prompted to log into the library's proxy server. Use your regular campus login to gain access. Need help? Contact the library staff by email: staff@demolib.org. Call the library at (260) 555-1212.'

Custom Panels on Mobile

- Custom Panels do not show up on mobile devices by default
 - With more individuals accessing materials remotely, you may see an increase of mobile usage
- To make Custom Panels show up on mobile devices, follow the instructions on the Knowledge Center titled "What kinds of things can a library put in Summon Custom Panels? "
 - Instructions and code you can copy and paste can be found in the section "Display Custom Panels on Mobile Summon Site"

Database Recommender and Best Bets

- Database Recommender and Best Bets are also good ways to highlight online content and other resources or provide inline help.
- Both are tag based, so they will only appear when the tags are searched
- You can activate resources and edit, add or remove tags in the Recommender Section of the Admin Console

The screenshot displays the Summon library catalog interface. At the top, there's a purple header with navigation links: A-Z List, RefWorks Log In, Feedback, and Help. Below this, the 'Summon' logo is on the left, and a search bar contains the word 'hours'. To the right of the search bar are icons for saved searches, a magnifying glass, and a dropdown menu showing 'New Search' and 'Advanced'. On the far right, there's a notification icon with a '0' and a hamburger menu icon.

The main content area shows '7,124,198 results sorted by relevance'. Below this, there's a section for 'Library Opening Hours' with a green arrow icon, a description, and a link to the library's opening hours page. The search results list includes two items:

- The government of self and others** by Foucault, Michel; Foucault, Michel. 1926-1984. 2010. Book. [Check Availability](#). B2430.F724F68213 2010. [Preview](#)
- Books of hours reconsidered** by Hindman, Sandra. 1944- editor; Marrow, James H., editor. Studies in medieval and early Renaissance art history., 2013. "For over three hundred years, more Books of Hours were made than any other type of book, even the Bible. From c. 1225, when the first Books of Hours began to..." Book. [Check Availability](#). ND3363.A1B67 2013.

On the left side, there's a sidebar with filters: 'REFINE YOUR SEARCH' (Full Text Online, Scholarly & Peer-Review, Open Access, Library Catalog), 'CONTENT TYPE' (Newspaper Article (5,116,724), Journal Article (1,411,081), Magazine Article (140,951), Trade Publication Article (110,580), Book / eBook (50,114), More...), 'LIBRARY LOCATION', and 'PUBLICATION DATE'.

On the right side, there's a 'Remote Access and Help' section with information about accessing resources from off-campus, on-campus access requirements, and contact information for the library staff.

360 Tips and Resources

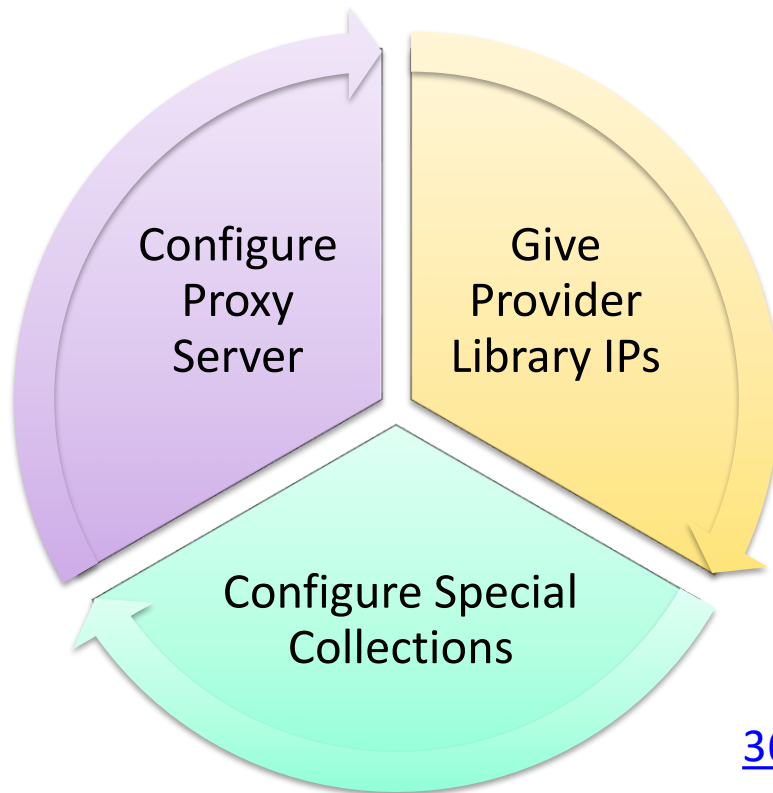
- Access
 - Optimize [E-Journal Portal](#) and [360 Link](#) for mobile devices
 - [Prioritize collection display in the E-Journal Portal](#)
 - [Enable the ILL form for 360 Link users](#)
 - [Enable Google Scholar as a 360 Link Referring Source](#)
 - [Troubleshoot authentication issues](#)
- Communication/Engagement
 - [Provide a 360 Link chat option for your users](#)
 - [Configure public notes about resources](#)
 - [Create custom links to library information or resources](#)
 - [Give users a simple way to report 360 Link issues to you](#)

360 Authentication Issues

[EZProxy](#)

[III \(Innovative
Interfaces\)](#)

[Fully coded URL
\(OpenAthens\)](#)



[360 KB Collections](#)

Chat Link: Built-in Support

Reading As If For Life

Author: Reed, Charles M.
Journal: Vital speeches of the day
ISSN: 0042-742X
Date: 11/15/2001
Volume: 68 Issue: 3 Page: 84

Full Text Online

from Health & Medical Collection ⓘ ▼

[Show more full-text options ▼](#)

[Edit Citation](#)

[Report a problem](#)

[Request via Interlibrary Loan](#)

Chat

Chat Link: Custom Example

```
jQuery(document).ready(function() { // create chat widget element var chatWidget = document.createElement("div");  
  
// assign ID to chat widget element chatWidget.id = "libchat_6f4cc0439d965374c31587f4a7e45531";  
  
// add chatWidget element to bottom of Sidebar jQuery(".inner").append(chatWidget);  
  
/ load script from vendor site jQuery.getScript("https://v2.libanswers.com/load_chat.php?hash=6f4cc0439d965374c31587f4a7e45531", function() {  
  
    });  
  
});
```



Are the 360 Link reports going to the correct people or team?

[Edit Citation](#)

[Report a problem](#)

[Request via Interlibrary Loan](#)


Send report and we'll investigate the problem.
Enter your name and email only if you wish to be contacted.

Name:

Email:

Message:

Use EJP & 360 Link 2.0 for responsive mobile support

 **Mobile Library**

Online Journals, Books and more English ▼

Search by Title or Identifier (ISSN/ISBN):

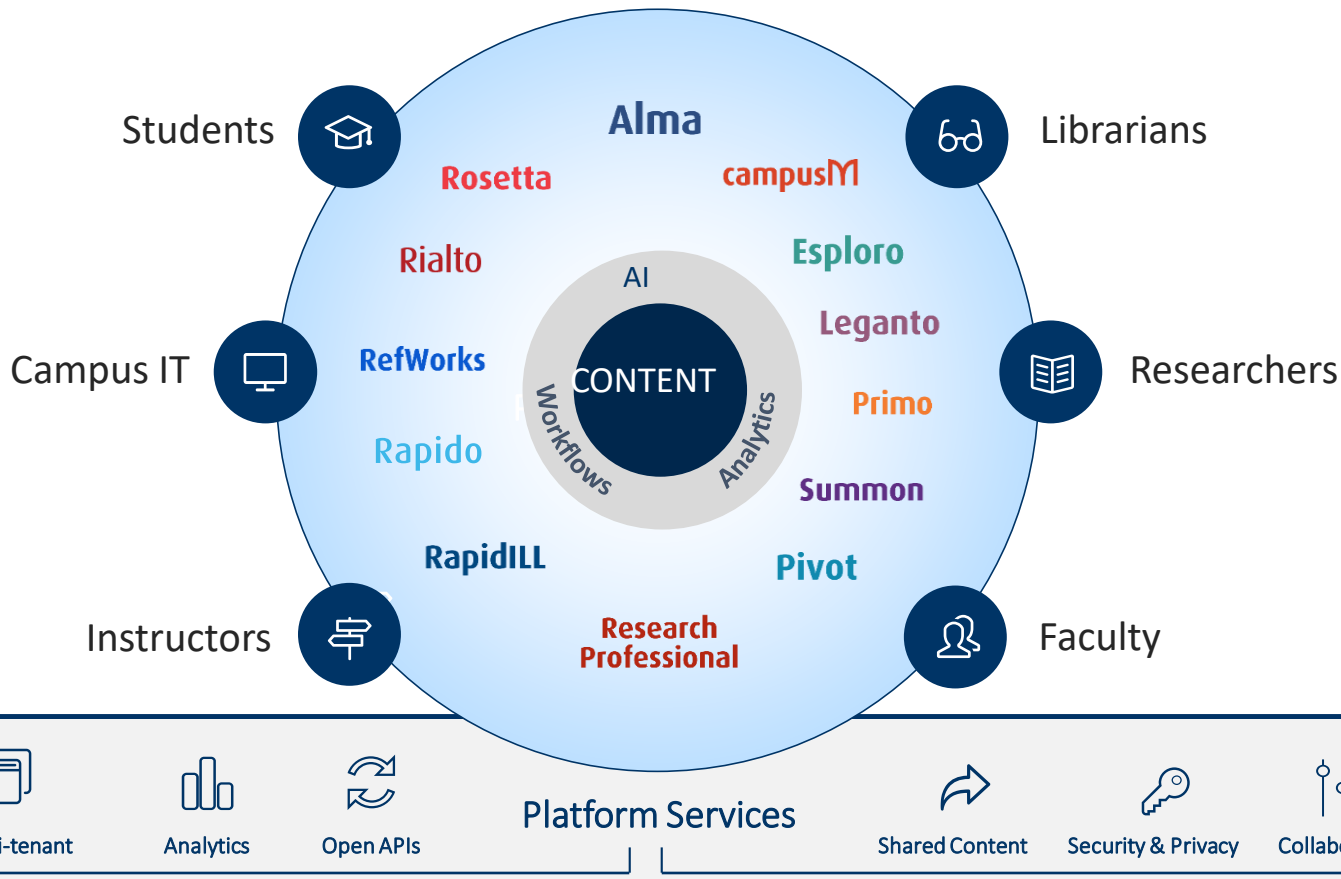
☐ All ☒ Journals Only ☐ Books Only

Title contains all words ▼

If you already have a citation and want full text, try [Citation Linker](#)

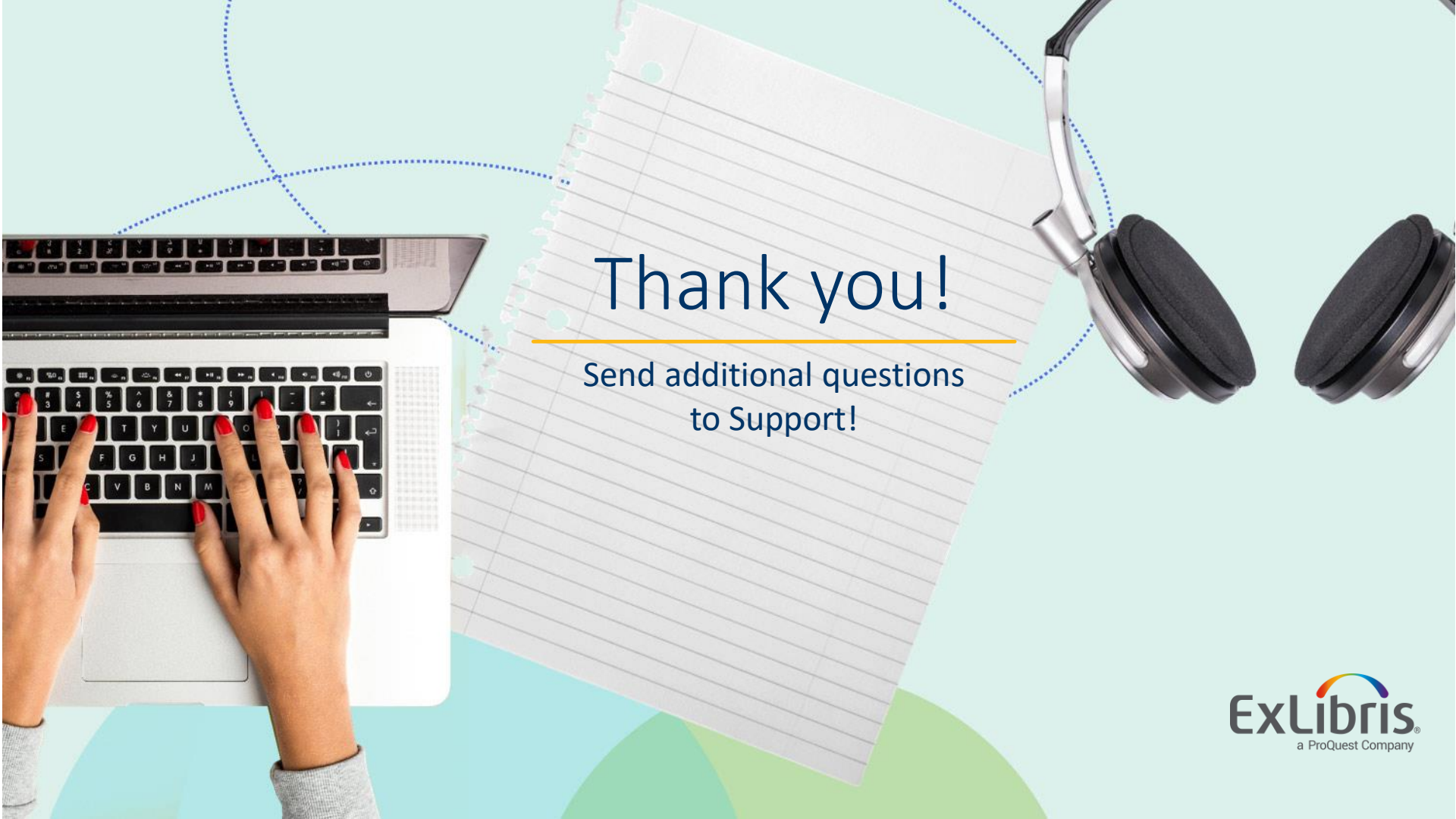
Browse by Title:

Ex Libris Higher-Ed Cloud Platform



Any additional questions? Send us via chat!





Thank you!

Send additional questions
to Support!