



Summon for Patron-Facing Librarians

Session Objectives

At the end of the session, you will be able to

- Explain how Summon indexes, searches, and ranks resources.
- Conduct topical and known item searches.
- Use facets and Advanced Search to refine results.

Summon: Discovery and Delivery



Discovery: Locating resources across multiple sources

- Conducting and refining searches
- Identifying relevant resources



Delivery: Getting access to the resources

- Holdings information for physical items
- Full-text for online items
- Request options for items without local access

Central Discovery Index (CDI)



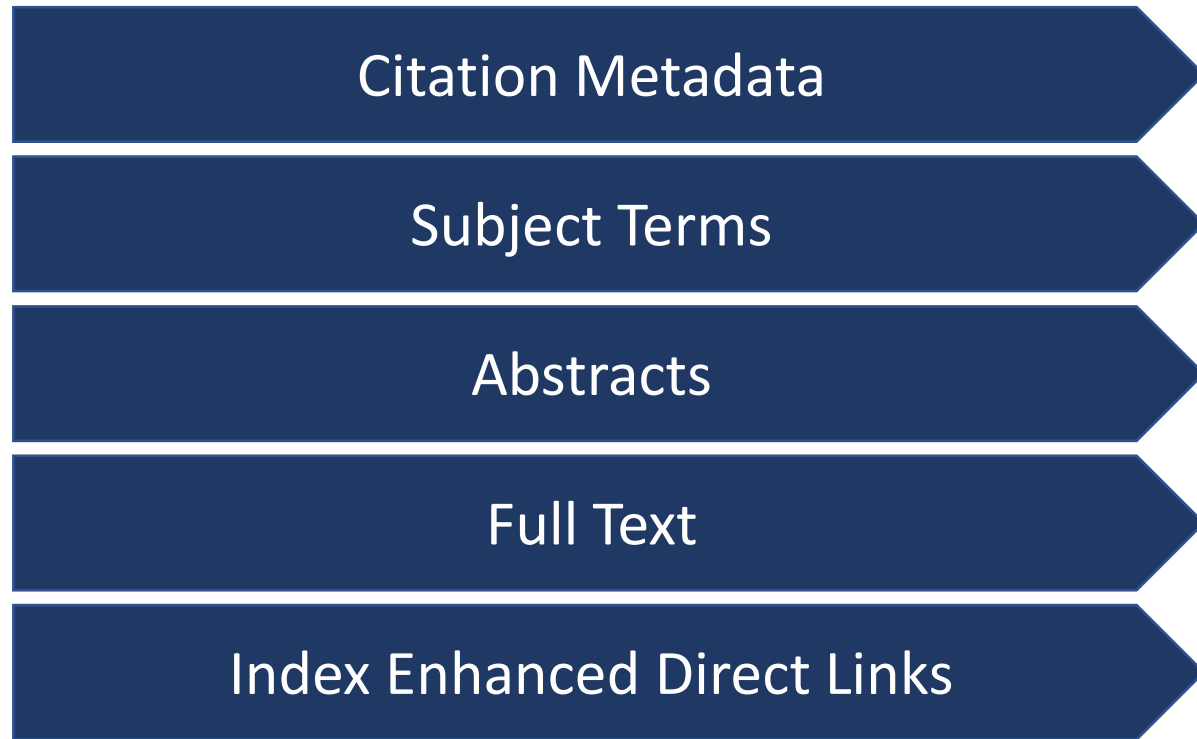
Several Billion Records

Over 7,000 Providers

Publishers, Aggregators,
Societies, Libraries

90+ Content Types

Summon Index: Provider Content



CDI: Special Provider Content

Ulrich's Peer Review/Scholarly Status

Web of Science Citation Counts

Scopus Citation Counts

CrossRef DOIs

**Central
Discovery Index**



CDI: Library Content

Catalog Records

Institutional Repositories

Research Guides

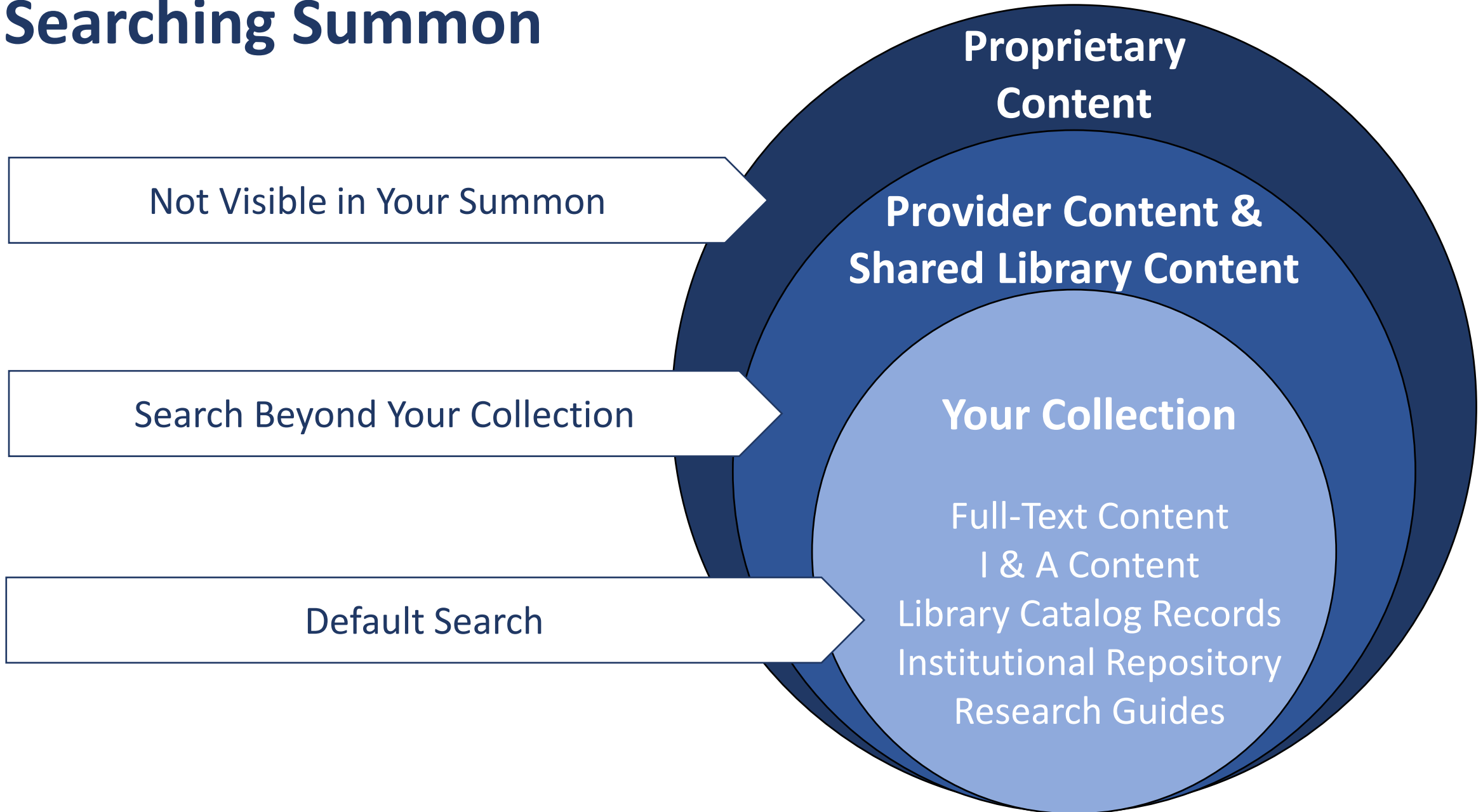
**Central
Discovery Index**

A diagram illustrating the flow of library content into a central discovery index. On the left, three dark blue arrow-shaped boxes point towards the right. The top box is labeled 'Catalog Records', the middle box is labeled 'Institutional Repositories', and the bottom box is labeled 'Research Guides'. On the right, a large white cylinder with a dark blue outline represents the 'Central Discovery Index'. The text 'Central Discovery Index' is centered within the cylinder in a bold, dark blue font.

Activating Your Collections

- 360 Core Client Center
- Intota
- Ex Libris Alma

Searching Summon




Master Summon Records



Search Result with Multiple Access Points

Access Points:

1. Catalog Record: eBook
2. Catalog Record: Print Book
3. Electronic Book Holding

39online

Grzimek's animal life encyclopedia

by [Grzimek, Bernhard](#); [Schlager, Neil](#); [Olendorf, Donna](#)

2003

eBook: [Full Text Online](#)

Book: [AVAILABLE, QL3 .G7813 2003 v.1, Library Depository](#) (+9 More)

Book: [Full Text Online](#)

[Preview](#) ▼

[Link](#) [Quote](#) [Email](#) [Folder](#) [More](#)

Search Result with Links to Full Text

19



Rise of Turfs: A New Battlefield for Globally Declining **Kelp Forests**

by [Filbee-Dexter, Karen](#); [Wernberg, Thomas](#)

[BioScience](#), 02/2018, Volume 68, Issue 2

Abstract **Kelp forests** are structurally complex habitats, which provide valuable services along 25...

Journal Article: [Full Text Online](#)

 [Preview](#) ▾ [Cites / Cited by](#)



Linking to Full Text

- Index-Enhanced Direct Linking (IEDL)
- OpenURL Linking

Relevance Ranking

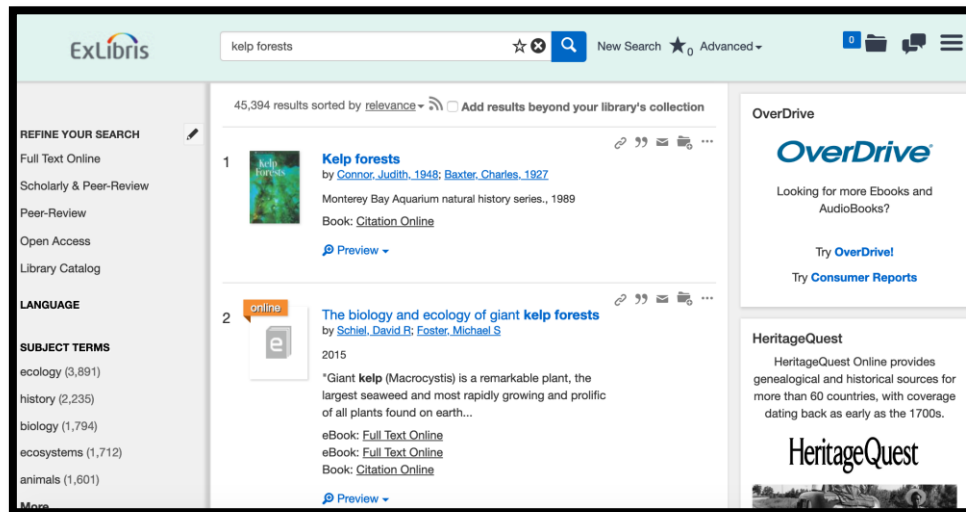
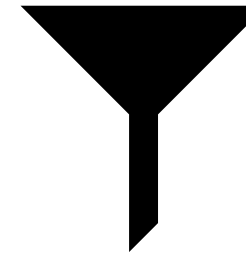
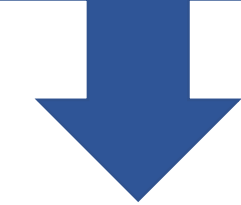
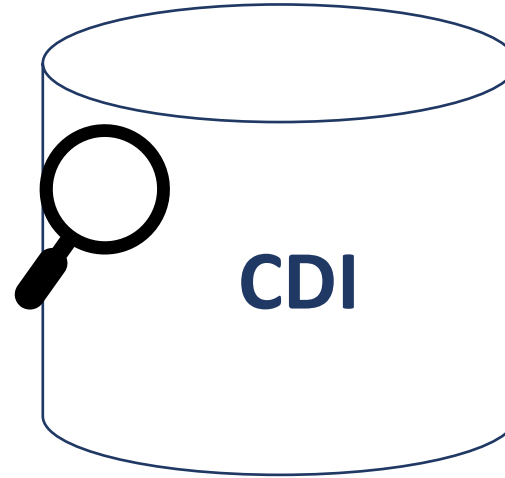
Dynamic Ranking (Search Terms)

- Term Frequency
- Field Weighting
- Stop Word Processing
- Synonym Mapping
- Stemming

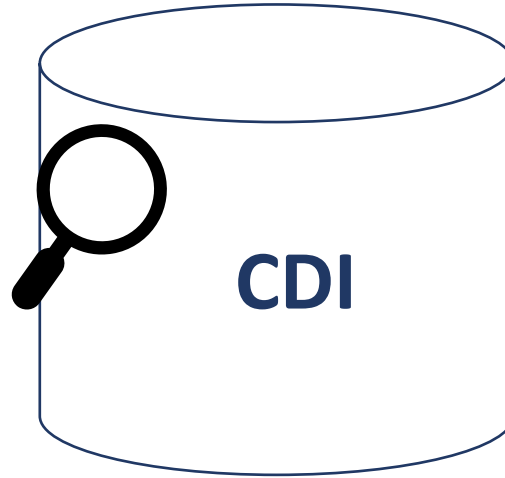
Static Ranking (Item Attributes)

- Content Type
- Publication Date
- Peer Review / Scholarly Status
- Citation Counts
- Local Collections

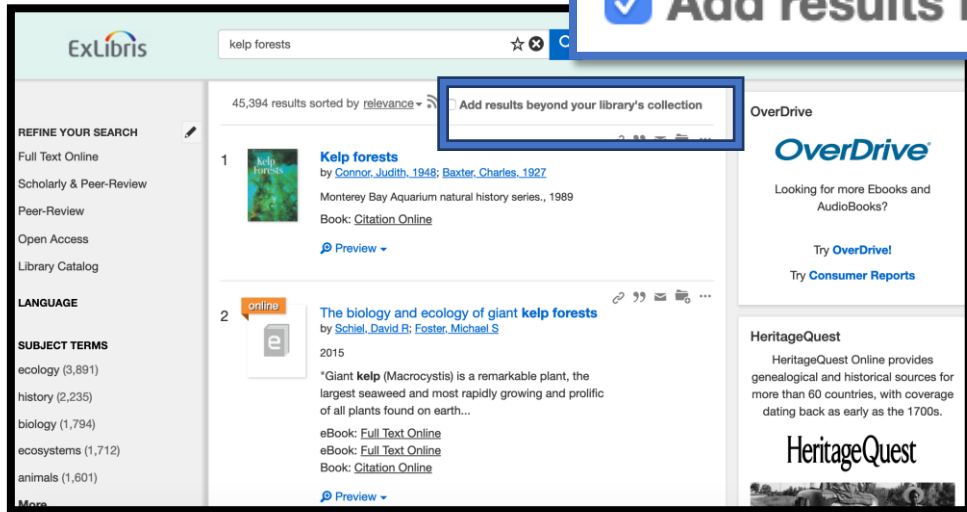
Bringing It All Together



Add Results Beyond Your Library's Collection



Add results beyond your library's collection



Customization in Summon

- Terminology
 - Citation Tracking
 - Altmetrics
 - Save Options
- and more . . .



Thank you!