



# Summon Quarterly Update and Q&A with 360 and Intota Services

July 2020

Brent D. Cook  
Director of Product Management, Summon



- Review Recent Summon Improvements
- Review 2020 Roadmap
  - August Release and Preview
  - November Release
- 360 / Intota Update
- Update on Current Rights Processing
- Recent Summon Customer Survey
- Upcoming Webinars and Community Involvement



# Recent Summon & CDI Improvements

Introduction of CDI and New Features

# Summon 2020 Release Schedule

## FEBRUARY RELEASE

- February 5<sup>th</sup>

## MAY RELEASE

- May 13<sup>th</sup>

## AUGUST RELEASE

- August 5<sup>th</sup>

## NOVEMBER RELEASE

- November 4<sup>th</sup>

**February  
2020**

### Introduction of CDI

- Improved performance and an upgrade to SOLR 7
- New facets
  - Author/creator
  - Collection (Database)
- Sort results by title or author
- Match & Merge improvements
- Search for authors or co-authors by ORCID IDs

**May  
2020**

- Linked Data
- WhatsApp Integration

**August  
2020**

- Add Section number to Course ID in Course Reserves page
- Consistent link back to search results
- Improve peer-review labeling
- Display books and ebooks edition and publication year in brief results
- Accessibility improvements for WCAG compliance

**November  
2020**

- Clarify author and editor in results and citations
- Databases A-Z List for Summon
- Mechanism for Best Bets to 'harvest' LibAnswers FAQs (from SpringShare)
- Keep search refinements when moving to Advanced search
- Sierra Integration (Initial Phase)



# Launch of the Central Discovery Index

Additional Functionality from CDI

# Central Discovery Index (CDI) Launched in February

- Summon customers went live with CDI on February 5
- Includes:
  - Improved performance and an upgrade to SOLR 7
  - New facets
    - Author/creator
    - Collection (Database)
    - The ability to sort results by title or author
  - Match & Merge improvements
  - The ability to search for authors or co-authors by ORCID IDs
  - New content providers and institutional repositories

# New Facets

- Author/creator
- Collection (Database)
- The ability to sort results by title or author
- Recently added items facet
- Created Do-Not Allow list for facet values

## Settings

General
Search Results
Logos
Authentication
<b>Facets</b>
Refworks
Syndetics
Languages
Participant Record Prioritization
Citation Formats
Advanced Search
Refine Your Search
Custom Link
Topics
Resource Link Prioritization
A&I Detail Page
Transliteration (880 Fields)
Configuration (read only)
...

### Facets

CUSTOM Contextual Faceting Enabled ON  On  Off

DEFAULT Refine Your Search Filters Enabled ON

DEFAULT Contextual Faceting for Union Catalog Enabled ON

CUSTOM Facets

Enabled	Disabled
<input type="text" value="ContentType"/>	<input type="text" value="Course Instructor"/>
<input type="text" value="Library"/>	<input type="text" value="Course Name and Number"/>
<input type="text" value="Publication Date"/>	<input type="text" value="Institution"/>
<input type="text" value="Discipline"/>	
<input type="text" value="SubjectTerms"/>	
<input type="text" value="Author"/>	
<input type="text" value="Language"/>	
<input type="text" value="Collection"/>	

CUSTOM Facets Display

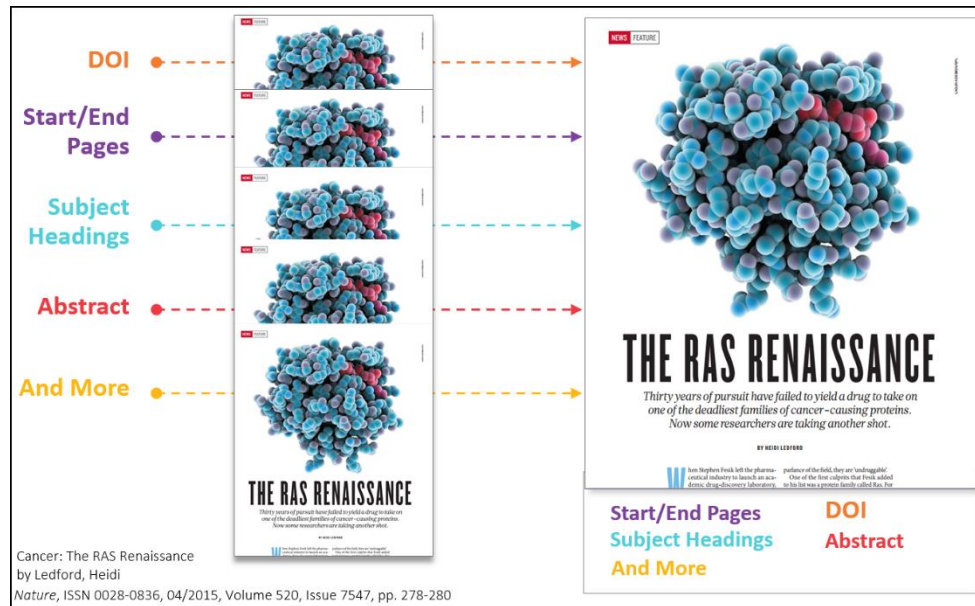
Expanded	Collapsed
<input type="text" value="ContentType"/>	<input type="text" value="Library"/>
<input type="text" value="Discipline"/>	<input type="text" value="Language"/>
<input type="text" value="Author"/>	<input type="text" value="Collection"/>
<input type="text" value="SubjectTerms"/>	

CUSTOM Library Location Whitelist



# Match & Merge Improvements to Reduce Duplicates

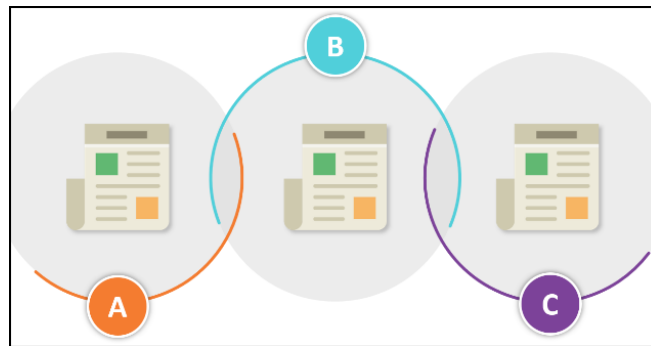
- Added newsletters to merge process
  - Reduce the overall footprint of these content types
- Improving subtitle handling
  - Reduce number of merges prevented by variations in the subtitles
- Increased overmatch limit
  - Improves matching of records with exceptionally large numbers of duplicates





# Match & Merge Improvements to Reduce Duplicates

- Relaxed language matching
  - Resolved discrepancy between Language Detected and sys\_language
- Standardized quotation marks
  - Ensure different formats (" vs “ vs ”) don't prevent merging
- Better handling of synonyms
  - Color vs. Colour





# Additional Improvements

First half of 2020

# Linked Data

## SEARCH AND EXPLORING



Customer  
Value

- Leverage linked data to create relationships and better expose metadata for use within Summon and in linking to external sources



Feature  
Highlights

- Expose additional metadata on the details page for SEO support

# Updated UI

- Detail page will also be landing page from search engine
- Needs to invite user to look around, discover more
- Provide detailed overview of the resource
- Engage user to take actions
  - Cite
  - Email
  - Save
  - Request
  - Share (twitter / Facebook / WhatsApp / Evernote / and more)
  - View in classic catalog

# Updated UI

University of Cincinnati Libraries  Powered by Summon

marmots  [New Search](#) [Advanced](#)  

[< Back to results](#)



## Mr. and Mrs. Bunny-- detectives extraordinaire: by Mrs. Bunny

by [Horvath, Polly](#); [Blackall, Sophie](#) 2012, 1st ed


Book [temporarily unavailable](#), J HOR, CECH Children's & YA Books

 [Cite](#)

 [Email](#)

 [Save](#)

 [Request](#)

 [View in classic catalog](#)

 [Share](#)

### Abstract

Middle-schooler Madeline's hippy parents have been kidnapped from Hornby Island, Canada, by foxes and Madeline, upon discovering that she can understand animal languages, hires two rabbit detectives to find them

### LibraryThing

  (3.80) | [16 Reviews](#) | [210 Copies](#)

### Book Reviews

 [Mr. and Mrs. Bunny - Detectives Extraordinaire](#)  
by [Valerie Nielsen](#)

# WhatsApp Integration



## USER EXPERIENCE



Customer  
Value

- Use WhatsApp for chat with patrons for real-time assistance regardless of where they are accessing your content from




Feature  
Highlights

- Simple integration allows for user to launch WhatsApp chat widget using WhatsApp API

A-Z List RefWorks Log In Feedback Help



Your Message:

 Start WhatsApp Chat

From Wikipedia

Marmot

Marmots are relatively large ground squirrels in the genus "Marmota", with 15 species living in Asia, Europe and North America. These herbivores are active during the summer when often found in groups, but are not seen during the winter when they hibernate underground. They are the heaviest members of the squirrel family.

[Read more](#)

# WhatsApp Integration

- Under Settings > Chat
- Enable WhatsApp Chat set to ON
- Enter the WhatsApp number and save your changes
- All chat logs and other functionality provided by WhatsApp

The screenshot shows the Summon™ Editor interface. At the top, there is a navigation bar with the following items: SETTINGS, MAPPING, PAGES, USAGE, TRANSLATIONS, RECOMMENDER, and CONTENT INGESTION. Below this is the 'Settings' page, which has a left-hand sidebar menu and a main content area.

The sidebar menu includes the following categories: 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, and Metrics. The 'Chat' category is currently selected and highlighted.

The main content area is titled 'Chat' and contains the following configuration options:

- Enable LibraryH3lp Chat Widget:** Set to ON (radio button selected).
- LibraryH3lp Queue:** Input field containing 'serials-solutions@chat.sg.libraryh3lp.com'.
- LibraryH3lp Skin:** Input field (empty).
- Enable SpringShare Chat Widget:** Set to ON (radio button selected).
- SpringShare IID:** Input field containing '1'.
- SpringShare Key:** Input field containing '618c19a7727b355'.
- SpringShare Domain:** Input field containing 'demo.libanswers.com'.
- Enable SpringShare V2 Chat Widget:** Set to OFF.
- SpringShare V2 Element ID:** Input field (empty).
- SpringShare V2 Script Source URL:** Input field (empty).
- Enable Question Point Qwidget:** Set to OFF.
- Question Point Qwidget Skin Source URL:** Input field (empty).
- Question Point Qwidget Instid:** Input field (empty).
- Enable WhatsApp Chat:** Set to OFF. This row is highlighted with a red box.
- WhatsApp Number:** Input field (empty).
- Widget Location:** Dropdown menu set to 'top'.
- Widget Online Image:** Preview image showing a red chat bubble with the text 'Chat With Us!'.
- Widget Offline Image:** Preview image showing a red chat bubble with the text 'Chat Is Offline'.
- Widget Email Address:** Input field containing 'randy.acker@proquest.com'.



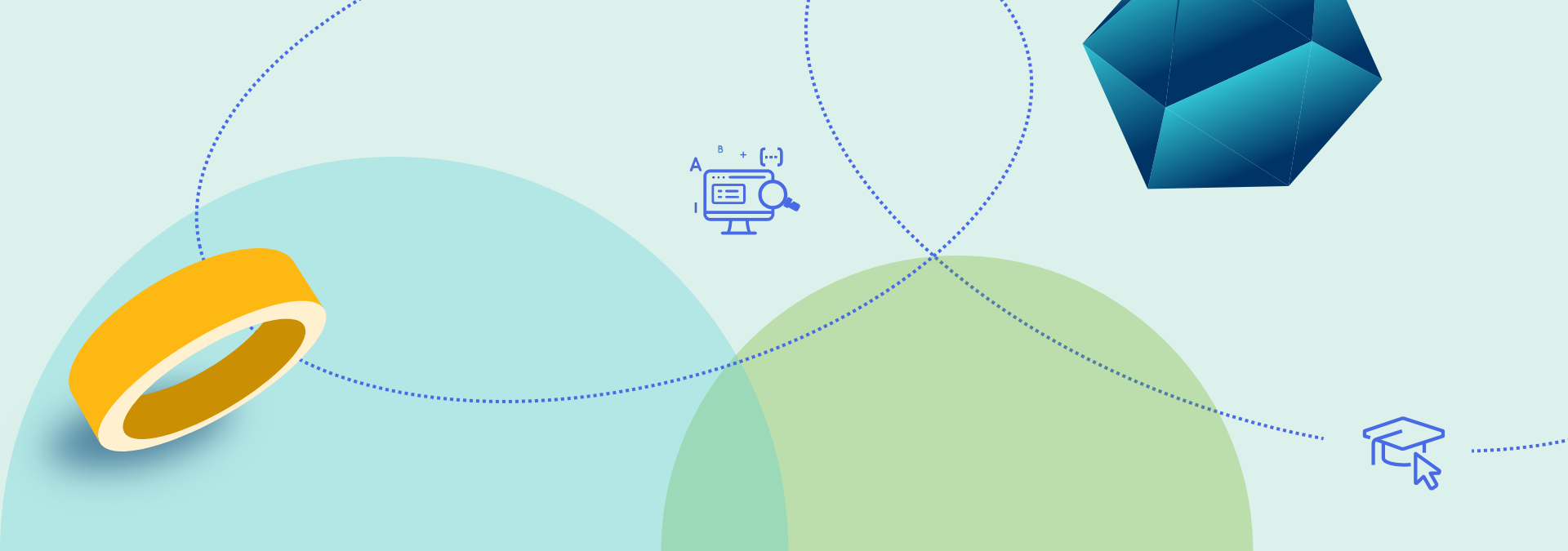


# Summon Roadmap

Second Half of 2020

# Notes on the Roadmap

- This roadmap is for informational purposes only.
- We will continue to review the roadmap for 2020, taking into consideration any impacts remote access and support may have on proposed features
- Inclusion of functionality will be based on capacity and potential risk vs benefit and will take into consideration impact to remote support



# August Release

# Summon 2020 Release Schedule

## FEBRUARY RELEASE

- February 5<sup>th</sup>

## MAY RELEASE

- May 13<sup>th</sup>

## AUGUST RELEASE

- Live: August 5<sup>th</sup>
- Preview: July 29<sup>th</sup>

## NOVEMBER RELEASE

- Live: November 4<sup>th</sup>
- Preview: October 21<sup>st</sup>

February  
2020

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# Add Section number to Course ID in Course Reserves page



## USER EXPERIENCE

NERS



Customer  
Value

- Simplify finding course materials by including section numbers with Course ID



Feature  
Highlights

- Display of multiple Section Numbers with each result in the Course Reserves page

Home Course Reserves A to Z list Feedback Help

Search by course name, description, or instructor

### Course Reserves (265)

Course ID	Description	Instructor
AA-279C-01	Spacecraft Attitude Determination and Control	Julie, Mars
ACCT-212-01-04	Managerial Accounting: Base	Amber, Stars
ACCT-524-01	Individual Taxes and Financial Planning	Robert, Muler
ACCT-542-01	Corporate Taxes and Business Strategy	Jackie, Swanson
AMSTUD-160-01	Perspectives on American Identity	Peter Klein
ANTHRO-112-01	Public Archaeology: Market Street Chinatown Archaeology very long name very long name very long name very long name...	Klaus, Otter
CEE-263A-01	Air Pollution Modeling	Lillie, House
CME-206-01	Introduction to Numerical Methods for Engineering	Marie, Cure
CS-106A-01	Programming Methodology	Lisa, Morison
LAW-558-01	Workshop on International Security, Law, and Social Science	Sue, Nelson
LAW-588-01	Sports Law	Maxim, Dole
STRAMGT-353-01-03	Entrepreneurship: Formation of New Ventures	Sofie, Madeline
STRAMGT-353-01-03	Entrepreneurship: Formation of New Ventures	Henri, Mouse
STRAMGT-359-01	Aligning Start-ups with their Market	Niva, Teline
STRAMGT-359-01	Aligning Start-ups with their Market	Aleksandra, Novaya
STRAMGT-368-01	Strategic Management of Nonprofit Organizations and Social	Mila, Slovi

# Consistent Link Back to Search Results



## USER EXPERIENCE

NERS



Customer  
Value

- Create consistent navigation experience for patrons



Feature  
Highlights

- Make return paths from advanced search, the saved folders and other elements consistent

# Consistent Link Back to Search Results

A-Z List RefWorks Log In Feedback Help

**Summon**


0 Saved Items

ProQuest RefWorks - Collect & organize your research

1 Create a RefWorks account and store all your saved items permanently, manage documents and references, and collaborate with other researchers. 1

[Sign up \(free\)](#)

You haven't saved any items yet.

Click the  icon next to any search result to add it to this folder.

Powered by **RefWorks**

**University Library**

< Back to results

**Search** [Clear Form](#)

All Fields

AND

AND

AND

Publication date

Last 12 months 3 years 5 years

from  to

[Fewer search options >](#)

**Content type** [click to search](#)

Any Type

Archival Material

Audio Recording

Book / eBook

**Discipline** [click to search](#)

Any Type

agriculture

anatomy & physiology

anthropology

**Limit to**

Items with full text online

Peer reviewed publications

Scholarly materials, including peer-reviewed

Items in the library catalog

**Exclude from results**

Newspaper articles

Book Reviews

Dissertations

**Summon**

Basic search

**Search** [Clear Form](#)

All Fields

AND

Publication date

Last 12 months 3 years 5 years

from  to



# Improve peer-review labeling



## USER EXPERIENCE

NERS



Customer  
Value

- Quickly identify peer-reviewed content within Summon results.



Feature  
Highlights

- Clearly label peer-reviewed content
- Functionality in addition to peer review facet

108,784 results sorted by relevance 

1



**Academic Plastic Surgery Retention**

by Chen, Jenny T; Girotto, John

Plastic and Reconstructive Surgery

 PEER-REVIEW

BACKGROUND: A critical e

 OPEN ACCESS

**surgery** program is the qua

# Configuration of peer review labeling

- In the Admin Console under Settings > Search Results
- Controls for Open Access Indicator and Peer Review Indicator are found at the bottom of that tile

The screenshot displays the configuration interface for the Search Results tile. On the left, a sidebar lists various settings categories: Participant Record Prioritization, Citation Formats, Refworks, Syndetics, Spotighting, Advanced Search, Refine Your Search, and Custom Link. The main area shows a list of settings, each with a 'CUSTOM' button, a description, a status (ON), and a toggle switch (On/Off). The 'Open Access Indicator' and 'Peer Review Indicator' settings are highlighted with a red box.

Setting Name	Status	Toggle
Merged document physical priority	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Citation Trail	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Related Items	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Research Article Identifier	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Display eResource Public Notes	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Display eResource Location Notes	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Display Unpaywall PDFs	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Open Access Indicator	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Peer Review Indicator	ON	On <input checked="" type="radio"/> Off <input type="radio"/>

# Display books and ebooks edition and publication year



## USER EXPERIENCE

NERS



- Easily identify difference between editions of books and ebooks



- Reduce appearance of duplicates by clearly labeling editions
- Increase usefulness of metadata displayed

4



### **Drugs in pregnancy and lactation: a reference guide to fetal and neonatal risk**

by [Briggs, Gerald G](#); [Freeman, Roger K., 1935](#); [Yaffe, Sumner J., 1923](#)

2008, 8th ed.

"Serving as the premier resource for clinicians treating new and expecting mothers, this innovative text



# Accessibility improvements for WCAG compliance

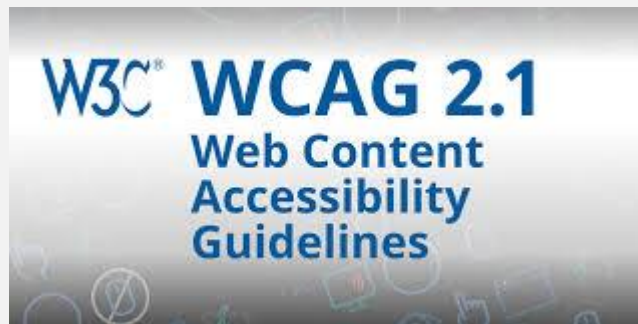


## USER EXPERIENCE



Customer  
Value

- Ensure important content is accessible to all patrons



Feature  
Highlights

- Complete review of Summon User Interface for compliance to accessibility guidelines
- Improvements based on internal and external evaluation and input



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# Clarify author and editor in results and citations



## USER EXPERIENCE

NERS



Customer  
Value

- Better visual treatment of author and editor in results and citations



Feature  
Highlights

- Distinguish between author and editor in brief preview in results



# Databases A-Z List within Summon

NERS



## SEARCH AND EXPLORING



Customer  
Value

- Expose all resources they have access to for the end patron



Feature  
Highlights

- Provide pathway to discovery A to Z list of all databases

# Mechanism for Best Bets to 'harvest' LibAnswers FAQs



NERS



Customer  
Value

- Easily find and implement new FAQs quickly using existing systems



Feature  
Highlights

- Use LibAnswers API to harvest LibAnswers to include in Best Bets
- Generate keywords using the metadata from LibAnswers

# Persistent Search Refinements



## SEARCH AND EXPLORING



Customer  
Value

- Allows for moving dynamically between basic and advanced search, bringing any refinements along with each search



Feature  
Highlights

- Consistency in application of facets and inputs across basic and advanced searches
- Retention of search parameters as the user moves between search screens

# Sierra Integration (Initial Phase)



Customer  
Value

- Better integration of library systems and Summon



Feature  
Highlights

- Allow for quicker, easier access to holding or checking out content
- Simplify administration by staff

# Integration Solution and Scope

- Integration of Summon – Sierra includes:
  - Supporting single Summon-Sierra institution
  - Display availability (items and their availability) embedded in Summon
  - Support login in Summon
  - Allow request in BIB/ Volume level
  - Display of library account in Summon, allow actions (Renew, Cancel, Edit etc).
- Target for Initial Release for Early Access partners: End Q1 2021
  - Expanding to general availability in H2 2021



## **Additional NERS Feature: Analysis for SAML/federated/"Shibboleth" login option**

# Analysis for SAML / federated / "Shibboleth" login option



## Customer Value

- Saved searches is currently supported via MS OneDrive or Google Drive
- Desire for SAML-based, federated authentication option for this feature and others



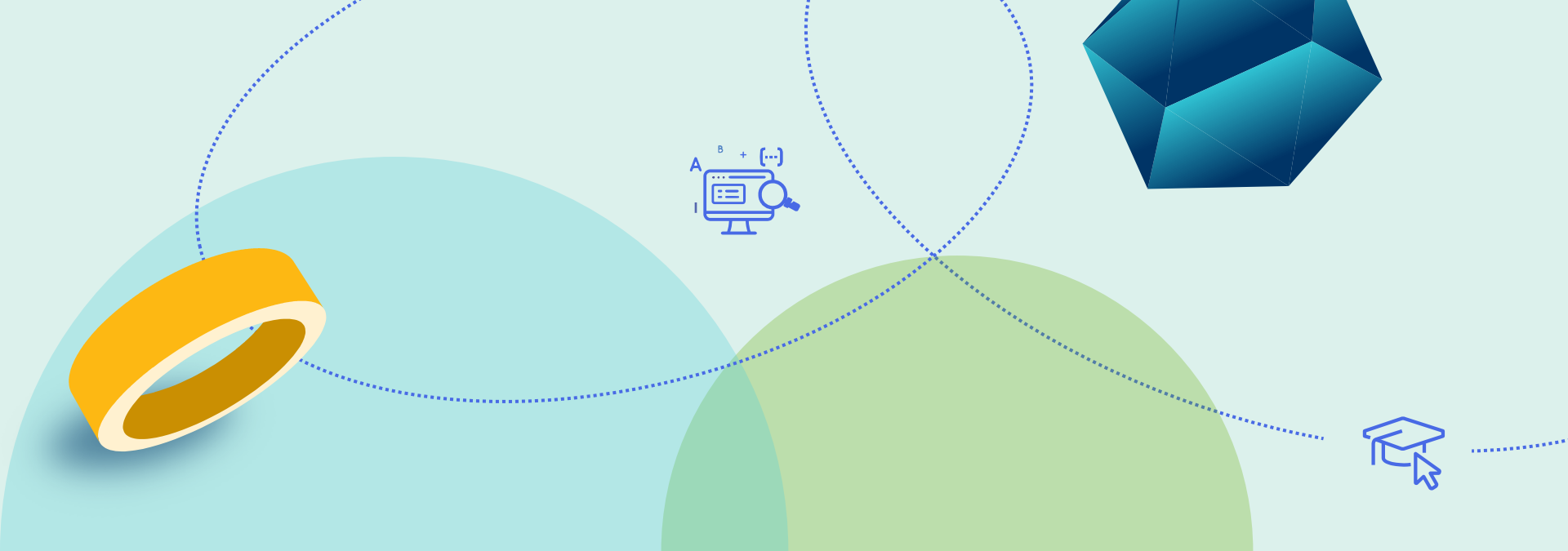
## Feature Highlights

- Analysis to determine best path forward for supporting improved integration
- Will take into consideration options for login to support Saved Searches, better integration with library services, and other opportunities



# Analysis for SAML / federated / "Shibboleth" login option

- Research outputs will include:
  - Initial analysis and planning
  - Outreach to Summon community to determine needs and priorities
  - Recommendation for development of functionality and project milestones / phases
- Timing for delivery of any functionality to be determined based on inputs from analysis



# 360 and Intota Services Update

# 2020 Release Schedule: 360 and Intota Services

Release	Date
2020 Q1	February 19
2020 Q2	May 13 & June 10
2020 Q3	August 4
2020 Q4	November 4

# 360 & Intota 2020 Roadmap Highlights



## ANALYTICS

- COUNTER r5
- Access to Summon Analytics from Client Center



## DISCOVERY & LINKING

- Monthly linker releases
- OpenAthens Redirector
- IEDL enhancements



## USER EXPERIENCE & ACCESSIBILITY

- Display database update time stamp
- VPAT analysis

# 2020 By the Numbers ... So Far



200+

Bug fixes

25+

Enhancements &  
Improvements

50+

New & updated 360  
Link linkers

95M

Resolved Links (IEDL and  
OpenURL)



# 2020 Q3 (Maintenance Release)

- View “last updated” for databases in 360 Core/Client Center and Intota
- ScienceDirect linker

**Code** M71

**Last Full Update** 05/31/2018  
**Last Partial Update** 04/17/2020

**Collection**

**Provider** American Institute of Physics

**Titles** 37

**Status** Subscribed

**Summon** ✓ 80% [View coverage](#)

**Display In:**  360 Core  
 360 Link



## Update on Current Rights Process

# Update on Current Rights Process

- We are currently working on updating the processing of rights
  - Adding more customers to the process
  - Improving throughput and error handling
- During this time rights may take up to 72 hours to process
  - Change from 24 – 48 hours
  - Change is to ensure reliability
- We will notify you when this timeframe changes

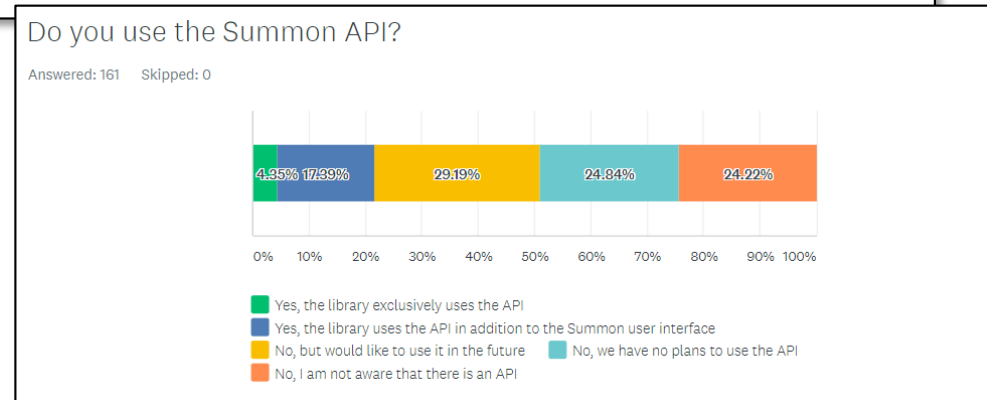
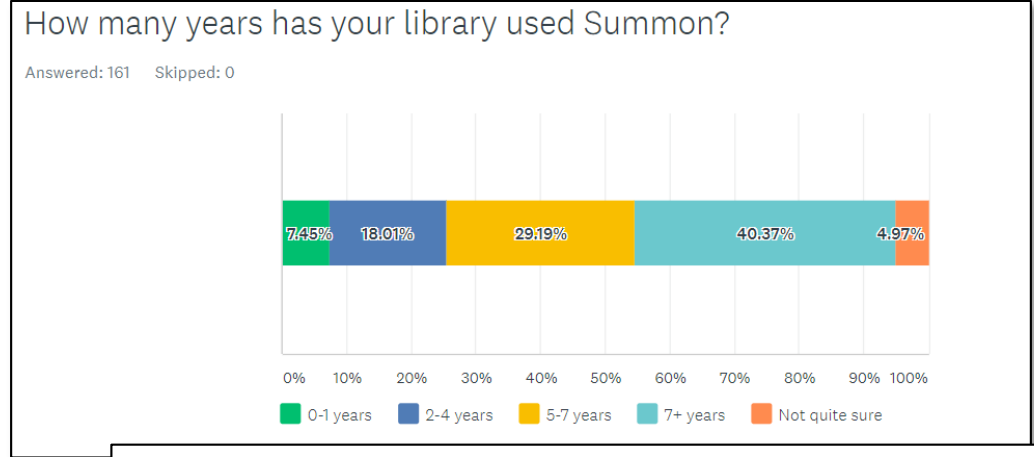




# Recent Summon Customer Survey

# Survey Respondents

- Survey Starts: 161
- Institutional profile:
  - ~70% using 5+ years
  - ~30% using the API
- Analyzed value/usage of:
  - Search and Exploration Features
  - Customizations and Activations
  - Integrations



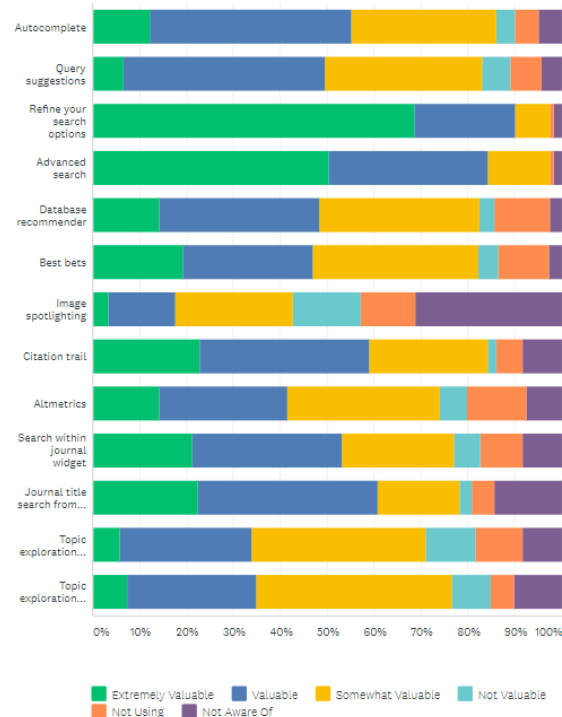
# Types of Questions Asked

- How libraries are using the API
- Use and Value of:
  - Search and Exploration Features
  - Customizations and Activations
  - Integrations
- Which aspects of Summon are most impactful
- Needed improvements to specific features to increase use
- Potential sharing of information/best practices

Q5

In your current Summon implementation, how valuable are the following search and exploration features?

Answered: 123 Skipped: 38



# Use and Value: Search and Exploration Features

- Most valuable highlighted below

	Using		Not Aware of
	Yes	No	
Advanced search	99.2%	0.8%	1.7%
Altmetrics	86.5%	13.5%	8.1%
Autocomplete	94.9%	5.1%	5.1%
Best bets	88.8%	11.2%	2.6%
Citation trail	93.8%	6.3%	8.9%
Database recommender	88.0%	12.0%	2.6%
Image spotlighting	82.9%	17.1%	45.0%
Journal title search from journal link	94.2%	5.8%	16.5%
Query suggestions	93.0%	7.0%	4.4%
Refine your search options	99.2%	0.8%	1.7%
Search within journal widget	90.2%	9.8%	8.9%
Topic exploration (encyclopedia content)	89.2%	10.8%	9.0%
Topic exploration (related items)	94.4%	5.6%	11.1%

# Use and Value: Customizations and Activations

- Most valuable highlighted

	Using		Not Aware of
	Yes	No	
A&I details	88.8%	11.2%	13.3%
<b>Contextual facets</b>	98.0%	2.0%	8.9%
Database filter	83.5%	16.5%	14.9%
<b>Facet expansion/collapsion</b>	98.2%	1.8%	4.4%
Grouping/rollup of content types (e.g. newspapers)	97.1%	2.9%	7.1%
<b>Open Access indicator</b>	94.5%	5.5%	4.3%
Ordering of Topics Explorer elements	87.8%	12.2%	18.9%
Participant record prioritization	85.0%	15.0%	29.8%
Public notes (eResources)	70.9%	29.1%	9.6%
Public notes (location)	67.3%	32.7%	10.6%
<b>Research article identifiers</b>	90.1%	9.9%	10.6%
<b>Resource linking prioritization</b>	92.9%	7.1%	13.9%
Saved search	93.5%	6.5%	5.3%
<b>Selection and ordering of citation export formats</b>	98.1%	1.9%	5.3%
<b>Shorter permalinks</b>	95.5%	4.5%	3.5%
Unpaywall .pdf	74.7%	25.3%	16.7%

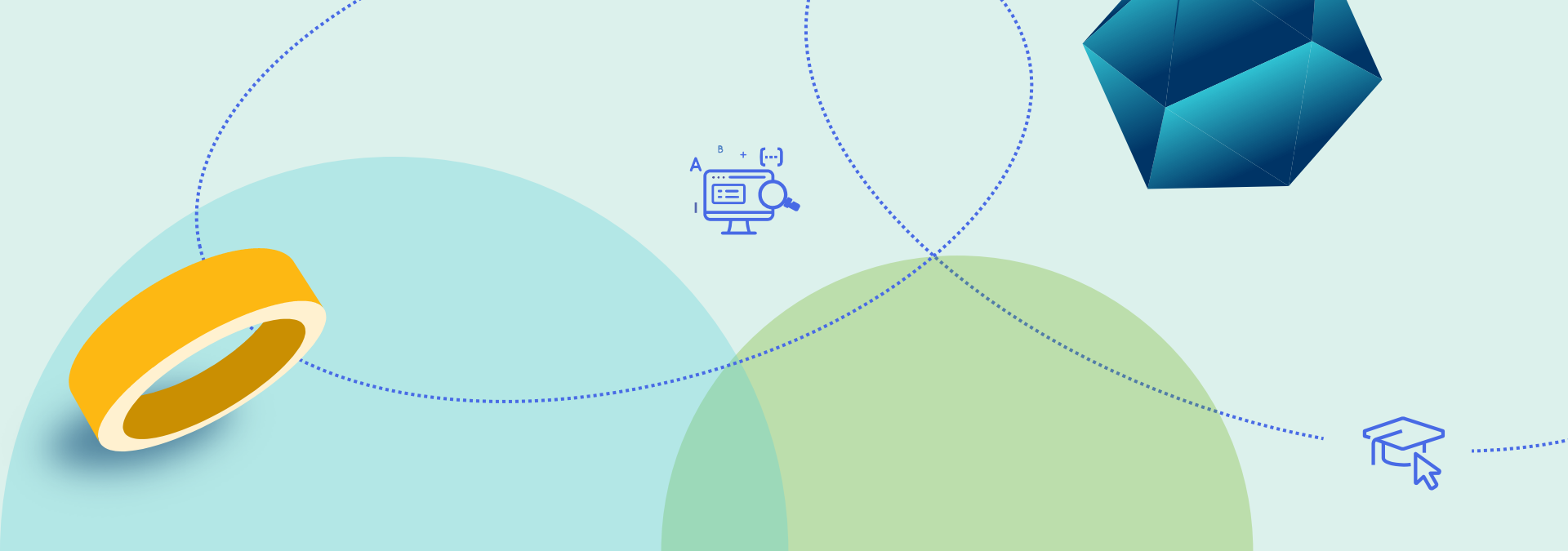
# Use and Value: Integrations

- Most valuable highlighted below

	Using		Not Aware of
	Yes	No	
<b>Alma</b>	17.8%	82.2%	1.8%
<b>Browzine</b>	43.6%	56.4%	10.6%
<b>bX Recommender</b>	47.4%	52.6%	15.2%
<b>Chat integration</b>	63.2%	36.8%	4.5%
<b>Leganto</b>	7.8%	92.2%	8.9%
<b>LibGuides</b>	74.8%	25.2%	1.8%
<b>ProQuest RefWorks institutional version (not the free version)</b>	49.1%	50.9%	3.6%
<b>StackMap</b>	11.9%	88.1%	25.0%
<b>Syndetics Unbound (beyond Syndetics cover images)</b>	51.5%	48.5%	8.0%

# Continuing the Conversation

- Leveraging responses to enhance customer education efforts
  - Feature awareness
  - API utility and use
  - Best practices
  - Integrations
- Reviewing comments on what improvements were said to be needed for use of specific features, customizations, and activations



# Upcoming Webinars



# Upcoming Webinars and Community Participation

- **Summon Features and Functionality Refresher**

- NA/APAC: August 12 at 5:00 pm (San Francisco) and August 13 at 8:00 am (Beijing); 9:00 am (Tokyo); 10:00 am (Sydney) – [register here](#)
- NA/EMEA: August 13 at 10:00 am (New York); 3:00 pm (London); 4:00 pm (Berlin) – [register here](#)
- NA: August 13 at 11:00 am (San Francisco); 1:00 pm (Chicago); 2:00 pm (New York) – [register here](#)

- Also, if you have any UX feedback or studies related to Topic Explorer or Database Recommender, please send them to me

- See listserv email for more details
- Thanks to those who have submitted so far



# Thank you!

[Brent.Cook@ExLibrisGroup.com](mailto:Brent.Cook@ExLibrisGroup.com)