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

July 2020

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Director of Product Management, Summon

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- 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

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Summon 2020 Release Schedule

FEBRUARY RELEASE
- February 5th

MAY RELEASE
- May 13th

AUGUST RELEASE
- August 5th

NOVEMBER RELEASE
- November 4th

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
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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
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Launch of the Central Discovery Index

Additional Functionality from CDI

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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 Facts

- 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

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

Cancer: The RAS Renaissance
by Ledford, Heidi
Nature, ISSN 0028-0836, 04/2015, Volume 520, Issue 7547, pp. 278-280
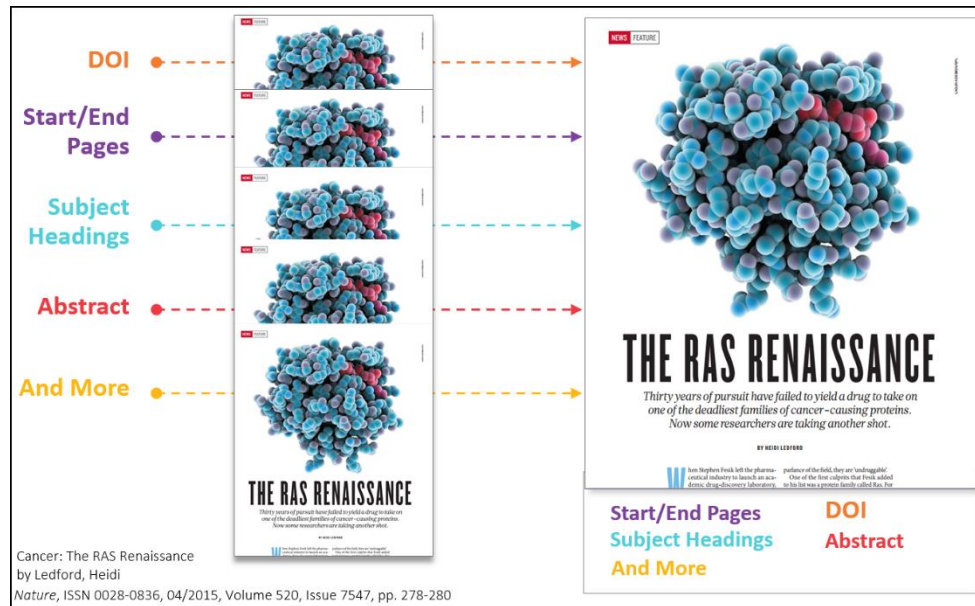
Match & Merge Improvements to Reduce Duplicates

- 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
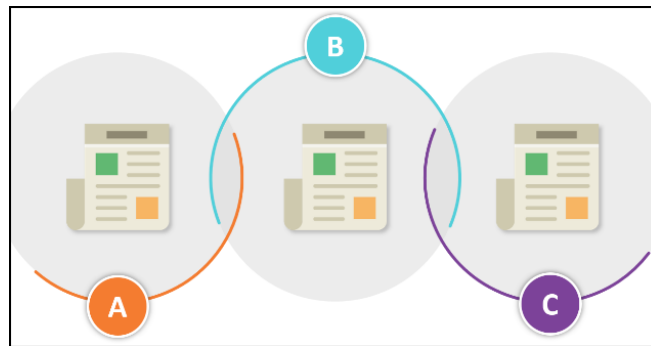
Additional Improvements

First half of 2020

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Linked Data

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

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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

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Updated UI

WhatsApp Integration

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

0

Your Message:

Optional

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

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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

Summon Roadmap

Second Half of 2020

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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
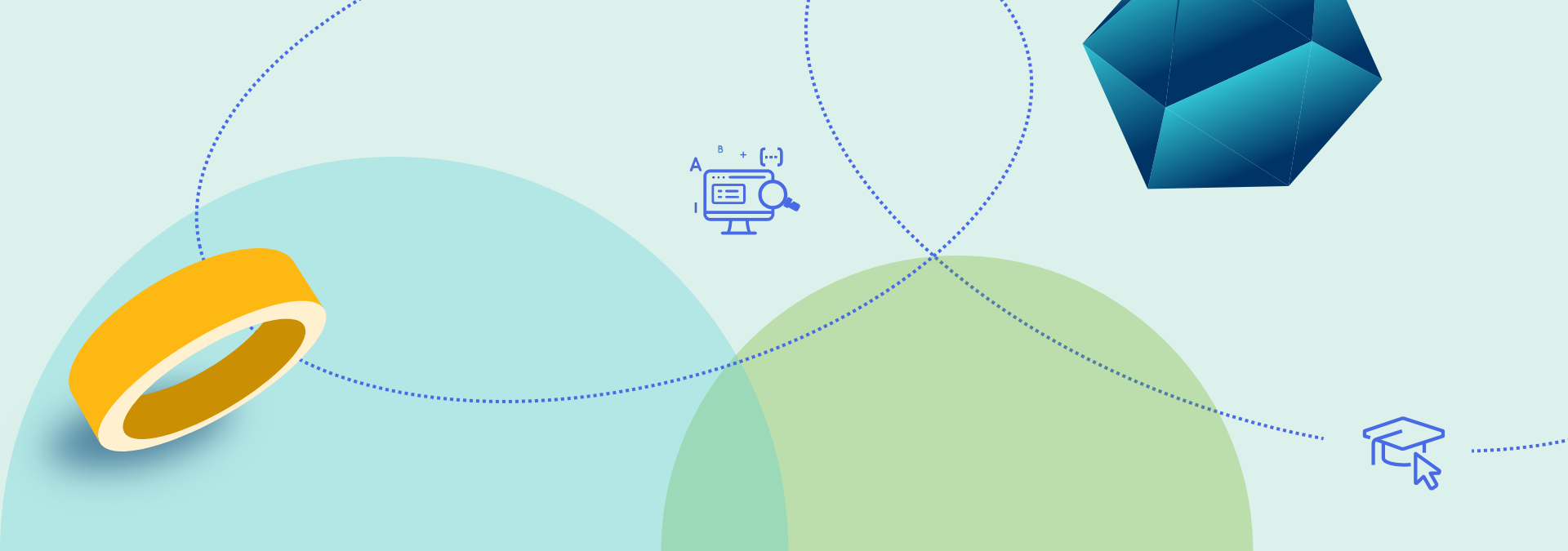
August Release

Summon 2020 Release Schedule

FEBRUARY RELEASE
- February 5th

MAY RELEASE
- May 13th

AUGUST RELEASE
- Live: August 5th
- Preview: July 29th

NOVEMBER RELEASE
- Live: November 4th
- Preview: October 21st

February 2020

May 2020

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Add Section number to Course ID in Course Reserves page

USER EXPERIENCE

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

Customer Value

- Create consistent navigation experience for patrons

Feature Highlights

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

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Consistent Link Back to Search Results

Improve peer-review labeling

USER EXPERIENCE

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

online

1 Academic **Plastic Surg**
Retention
by Chen, Jenny T; Girotto, John

Plastic and Reconstructive S

PEER-REVIEW   BACKGROUND:A critical e

OPEN ACCESS   **surgery** program is the qua

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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

Display books and ebooks edition and publication year

USER EXPERIENCE

Customer Value	• Easily identify difference between editions of books and ebooks
Feature Highlights	• Reduce appearance of duplicates by clearly labeling editions • Increase usefulness of metadata displayed

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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

Customer Value

- Ensure important content is accessible to all patrons
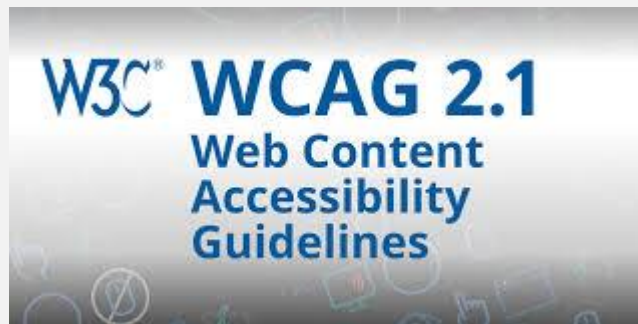
Feature Highlights

- 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

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

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Databases A-Z List within Summon

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

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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

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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

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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

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

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Analysis for SAML / federated / "Shibboleth" login option

LIBRARY EMPOWERMENT

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

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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
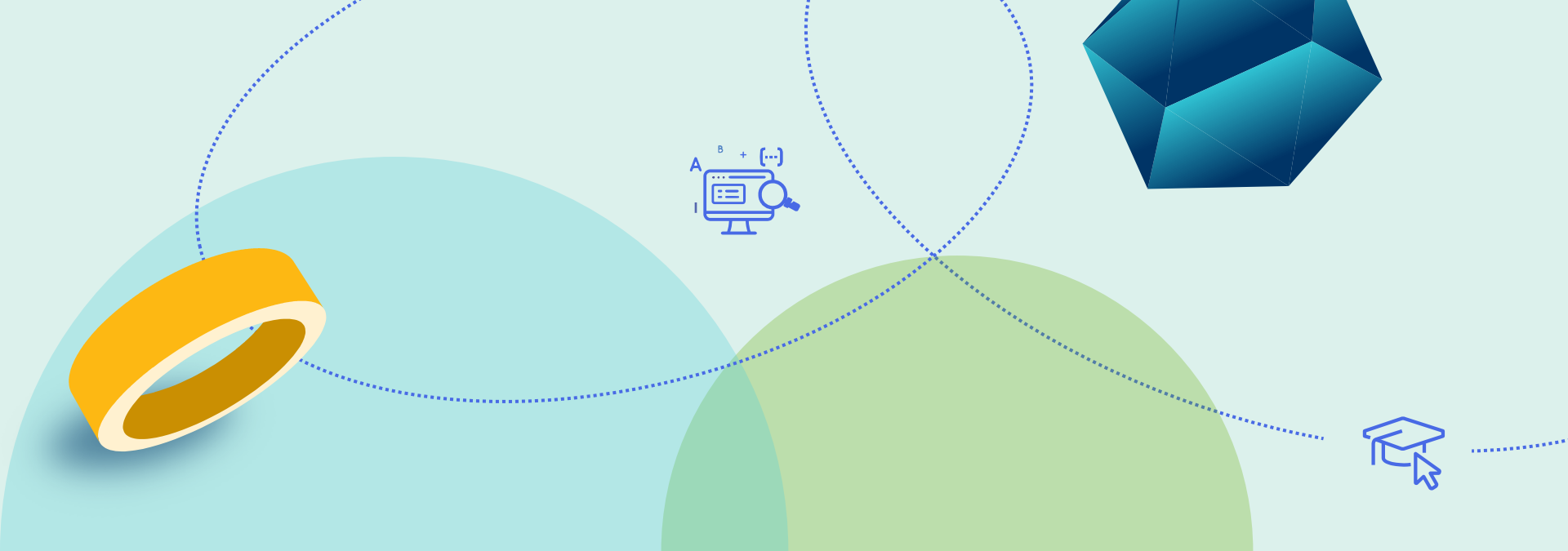
360 and Intota Services Update

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

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360 & Intota 2020 Roadmap Highlights

ANALYTICS	DISCOVERY & LINKING	USER EXPERIENCE & ACCESSIBILITY
• COUNTER r5 • Access to Summon Analytics from Client Center	• Monthly linker releases • OpenAthens Redirector • IEDL enhancements	• Display database update time stamp • VPAT analysis

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2020 By the Numbers ... So Far

200+
Bug fixes

25+
Enhancements & Improvements

50+
New & updated 360 Link linkers

95M
Resolved Links (IEDL and OpenURL)

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2020 Q3 (Maintenance Release)

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

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

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Recent Summon Customer Survey

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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

How many years has your library used Summon?

Answered: 161   Skipped: 0

| 7.45% | 18.01% | 29.19% | 40.37% | 4.97% |

■ 0-1 years ■ 2-4 years ■ 5-7 years ■ 7+ years ■ Not quite sure

Do you use the Summon API?

Answered: 161   Skipped: 0

| 4.35% | 17.39% | 29.19% | 24.84% | 24.22% |

■ Yes, the library exclusively uses the API
■ Yes, the library uses the API in addition to the Summon user interface
■ No, but would like to use it in the future   ■ No, we have no plans to use the API
■ No, I am not aware that there is an API

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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

Use and Value: Search and Exploration Features

- Most valuable highlighted below

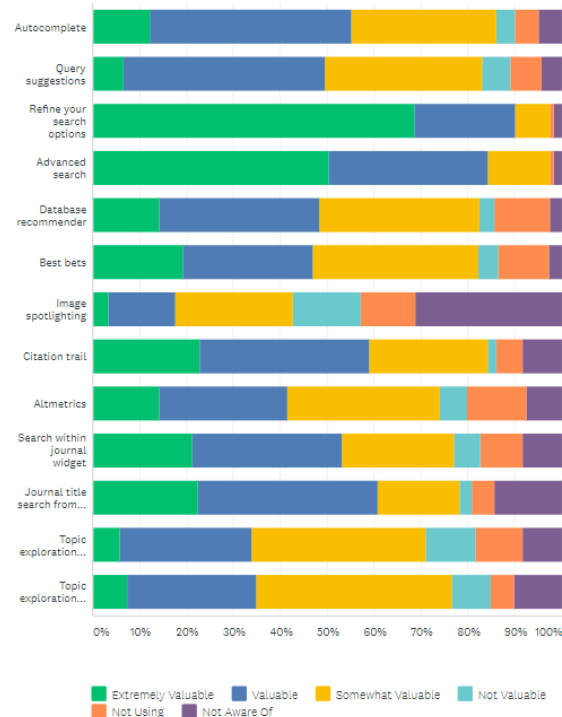|	Using		Not Aware of
	Yes	No	
Advanced search	99.2%	0.8%	1.7%
Altmetrics	86.5%	13.5%	8.1%
Autocomplete	94.9%	5.1%	5.1%
Best bets	88.8%	11.2%	2.6%
Citation trail	93.8%	6.3%	8.9%
Database recommender	88.0%	12.0%	2.6%
Image spotlighting	82.9%	17.1%	45.0%
Journal title search from journal link	94.2%	5.8%	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%

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Use and Value: Customizations and Activations

- Most valuable highlighted

	Using		Not Aware of
	Yes	No	
A&I details	88.8%	11.2%	13.3%
Contextual facets	98.0%	2.0%	8.9%
Database filter	83.5%	16.5%	14.9%
Facet expansion/collapsion	98.2%	1.8%	4.4%
Grouping/rollup of content types (e.g. newspapers)	97.1%	2.9%	7.1%
Open Access indicator	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%
Research article identifiers	90.1%	9.9%	10.6%
Resource linking prioritization	92.9%	7.1%	13.9%
Saved search	93.5%	6.5%	5.3%
Selection and ordering of citation export formats	98.1%	1.9%	5.3%
Shorter permalinks	95.5%	4.5%	3.5%
Unpaywall .pdf	74.7%	25.3%	16.7%

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Use and Value: Integrations

- Most valuable highlighted below

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

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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
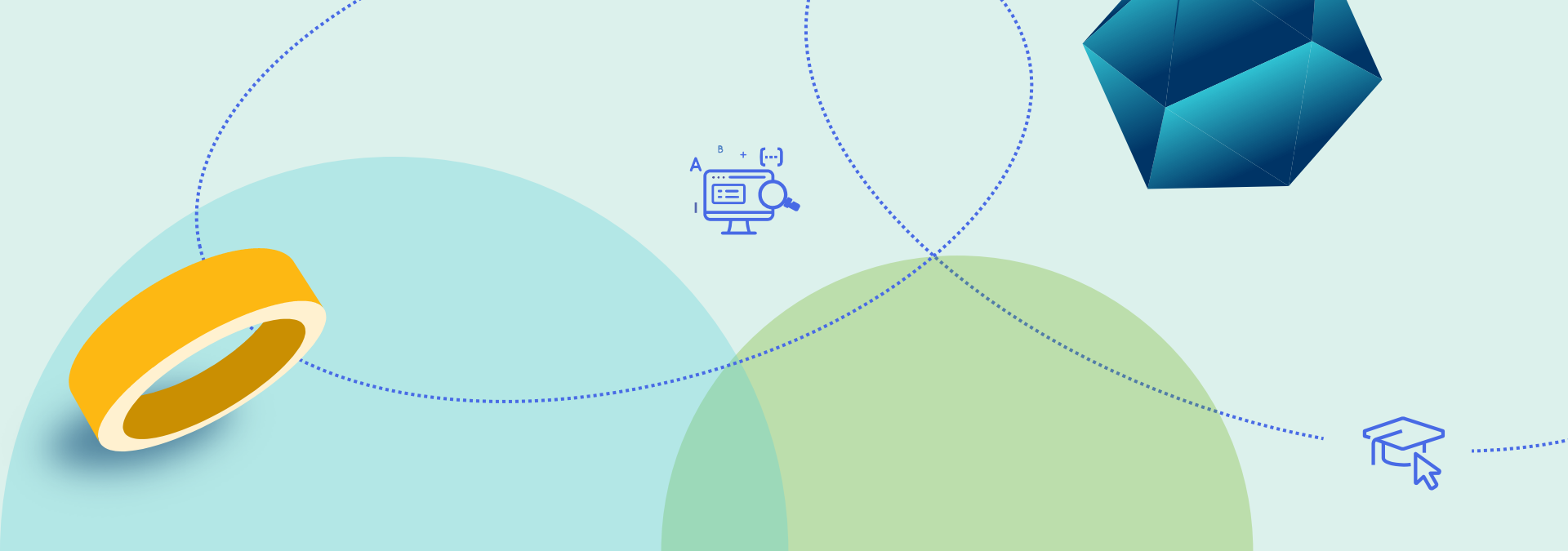
Upcoming Webinars

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