Summon: Advanced Search Interface

- **Product:** Summon

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How do we use the Advanced Search interface in the Summon service?

**Note**

Libraries using the legacy Summon interface should jump [here](#). If you are not sure if your library uses the legacy or the 2.0 interface, compare your Summon search box to the legacy and 2.0 search boxes displayed in the [Summon 2.0](#) overview.

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How Advanced Search Works in Summon 2.0

The Summon Advanced Search interface allows you to design searches that retrieve more focused results than do basic keyword searches.

Access Advanced Search by clicking on the gear icon to the right of the keyword search box:

![Advanced Search Interface](image)

Use the Advanced Search interface to select search fields and incorporate the Boolean operators AND, OR and NOT between search terms in your queries. Apply filters before executing a search to further refine your query and limit the search results returned, or expand your search to include items in the Summon index that are outside your library’s collection.
Boolean Operators In Advanced Search

The Advanced Search screen relies on the Boolean drop-down menu for Boolean queries. For example, here is a search for items with the subject term blogs, authored by Lisa Smith:

When applying Boolean operators to combine search terms in one box on the Advanced Search screen, Summon automatically applies parentheses around the terms. For example, a user interested in either college or university assessment could enter their query as:

and Summon will automatically process the query as (college OR university) AND assessment.

Summon also automatically applies parentheses when you select OR from the Boolean drop-down menu. For example, the above query could also be entered this way:
The **Add a row** link in the bottom row supports a maximum of 20 rows for the user to interact with.

For additional information about use of Boolean searches see [Boolean, Phrase, Wildcard and Proximity Searching](#).

**Fields in Advanced Search**

The following Summon fields are searchable via the Advanced Search interface:

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<thead>
<tr>
<th>Advanced</th>
<th>Basic</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Abstract</td>
<td>• All Fields (excludes Volume)</td>
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<tr>
<td>• CODEN</td>
<td>• Author (includes Author and Corporate Author)</td>
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<tr>
<td>• Call Number</td>
<td>• Title (includes Title, Subtitle, and Document Title Alternate)</td>
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<tr>
<td>• Dewey</td>
<td>• Publication Title*</td>
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* Publication Title: Identifies the source (journal, newspaper, book, etcetera) of the item (journal article, newspaper article, book chapter, etcetera).

See also [Metadata Content and Search Fields in the Summon Index](#) for more information about what is included in the Summon Index and what is searched.
Filtered and Expanded Results in Advanced Search

Apply filters before executing a search to further refine or expand your query:

- Dates published from and to: Use these fields to limit publication date to a specified range. Clicking on a field displays a calendar where you can select 1) a year, 2) a month and year, 3) a day, month, and year.
  - You can also choose to not use the calendar and enter your own dates. Use the / character when entering a month or day. For example, a user in the United States would enter May 2012 as 05/2012 or 5/2012.

- Show content type: Use this field to select one or more content types, such as Book / Ebook, Journal Article, Image, Video Recording, etc. Content types are limited to those which exist in your library collection.

- Show only: Use these checkboxes to limit result to full text online, scholarly materials, peer reviewed materials, or items in your library's catalog.

- Exclude these results: Use these checkboxes to exclude newspaper articles, book reviews, or dissertations from results.

- Expand your results: Use this checkbox to expand the result set to items in the Summon index that are outside your library's collection.

How to Customize Advanced Search

Use the Settings page in the Summon Administration Console to enable or disable the following Advanced Search page features:

- Dates published filter

- Show Only: (Options can be enabled / disabled as a group or individually.)
  - Items with full text online
    - Scholarly materials, including peer-reviewed
    - Peer reviewed publications
    - Items in the library catalog (mostly print and physical material)

- Exclude from results: (Options can be enabled / disabled as a group only.)
  - Newspaper articles
  - Book reviews
  - Dissertations/Theses

- Expand your results: Include results from outside your library's collection

How Advanced Search Works in the Legacy Summon Interface

The advanced search interface provides patrons the ability to search for specific items based on detailed search criteria. The Advanced Search interface is most helpful for patrons who already know details about the item they wish to retrieve:
Here are brief descriptions of each field:

- **With these terms**: Use this field to enter search terms (same functionality as a Basic Search).
- **Written/created by**: Use this field to specify an author or creator name, including corporate bodies.
- **With these words in the title**: Use this field to search for article titles, book titles, book chapter titles, etc. Metadata fields queried are Title, Subtitle, and Document Title Alternate.
- **ISBN / ISSN**: Use this field to enter the ISBN or ISSN for the resource to be retrieved.
- **From this publication**: Use this field to specify the name of the publication containing the article or book chapter from within a known publication.
- **Volume and Issue**: Use these fields to specify the volume and issue numbers for serials publications.
- **Dates published from and to**: Use these fields to limit publication date to a specified range.
- **Show content type**: Use this field to select a content type, such as book/ebook, journal, image, manuscript, newspaper article, etc.
- **Show only**: Use these checkboxes to limit result to full text online, scholarly materials, peer reviewed materials, or items in your library's catalog.
- **Exclude these results**: Use these checkboxes to exclude results from newspaper articles, book reviews, or dissertations.
- **Expand your results**: Use this checkbox to expand the result set to items outside your library's collection.

The advanced search interface can be customized by enabling or disabling the following four options in the Summon Administration Console:
• Dates published from
• Show only
• Exclude from results
• Expand your results

For more information, see How to embed a direct link to the Advanced Search page and Basic Search. If you are interested in Boolean, Wildcard, or Proximity searching, click here.

See also Metadata Content and Search Fields in the Summon Index.

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