Summon: Release Notes

• **Product:** Summon

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Where can I find the Summon service release notes?

Upcoming and recently released features are listed below, along with notices of major changes to the Summon service. To stay informed in the most timely way, however, you should consider subscribing to the Summon listserv.

You might also be looking for:

• The [status](#) of the Summon Index in relation to content changes you are expecting to appear in Summon.

• [System Status Page](#) providing updates on system availability, known performance issues and more.

• The [Release Preview Environment](#) where you can view your Summon instance with the changes that will be included in the next release.

• A list of planned Summon 2.0 user interface projects, see the overview of interface development plans.

• [Recordings of Summon Update sessions](#) presented by the product management team.

• The [Ideas Exchange](#) page where you can post, vote, and comment on what you feel is important to further Summon development.

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**August 5, 2020**

Below are some details for features in the current release. All of these ideas originated on the Idea Exchange and were the top votes for the NERS process for 2020. Your participation in the IGELU and ELUNA NERS processes guaranteed that these features would be delivered this year. More NERS enhancements are coming in November!

**Enhancements**

• **Section Number on Course Reserves Page** –
  
  ![Folder](#)  
  
  **NERS Enhancement** and

  ![Light bulb](#)  
  
  **Idea Exchange**

  • For Summon over Alma customers, you can now display the section number along with the Course ID on the Course Reserves page.

• **Consistent Links Back to Results** –

  ![Folder](#)
**NERS Enhancement and Idea Exchange**

- Now links from various Summon pages (such as the Saved Items Folder and Advanced Search) have consistent labels and placement to improve the overall user experience.

**Improved Peer Review Labeling**

- You can add a Peer Review icon in the same location as the Open Access icon for improved visibility.
- In the Admin Console under **Settings > Search Results**, you will find the option to turn the icon on or off at the bottom of the list of options labeled **Peer Review Indicator**.

**Display Book and Ebook Publication details**

- Brief records in results for books and ebooks will now display Series Title, Edition, and Year.

You can also learn more about these features by reviewing the most recent Summon Update and Q&A session, available for you to view as either a **YouTube** video, **WebEx** recording, or **PDF**.

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**May 13, 2020**

Below you will find highlights of user-facing improvements and bug fixes. You can also learn more about these features by reviewing last week's **Summon Quarterly Update and Q&A sessions**.

**Enhancements**

- **Linked Data**: Catalog Detail Page layout update to enhance data on page and create optimized site map for ingestion by major search engines.
  - Modified layout and design of call to action buttons, such as request, hold and share social media and to improve navigation beyond the detail page.
  - Created structure in page that allows for mapping of Summon XML to the JSON LD schema, pages are now easier for search engines to crawl for metadata.
  - Next step will be to create admin tools for generating specific site map pages by institution.

- **WhatsApp Integration**: Provides a new chat service integration for you to leverage. For more information, see
**Summon: Administration Console: Chat Widgets.**

- Add your WhatsApp number and configuration under Settings > Chat in the Summon Admin Console.
- Chats will be directed to the smart phone number entered in the Admin Console; to change who the chats are routed to, you can update the number in the Admin Console and the change should take effect in five minutes or less.

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**Note**

Chat functionality is managed by the WhatsApp application; features such as chat log or history are provided by WhatsApp.

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- **New Records facet:** limits results to records added to the index in the last 7, 30 or 90 days.
  - “New Records” label can be customized under “Translations” in the Summon Admin Console.
  - The facet can be enabled or disabled or placed in a different display order with other facets by going to Settings > Facets in the Admin Console.
  - This was added as part of the March maintenance release.

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**Note**

Currently, some existing catalog records may show as “new” in this facet; this is because an existing record has merged with a record that is new to the index, making the entire record appear new; we are working on revising the logic to address this.

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**February 5, 2020**

Below you will find highlights of user-facing improvements and bug fixes. You can review existing functionality for Summon now on CDI and preview new features in the Summon Release Preview Environment as of January 23. This applies to Summon customers, Summon over Alma customers, and customers of the Summon API.

**CDI Improvements**

You can now test out Summon using the Ex Libris Central Discovery Index. Overall, your instance of Summon should remain the same as it was on the Summon index; there should be no changes to your user interface, API connections or backend management.

Below are some performance improvements, system enhancements, and index changes that you will benefit from immediately with no need to configure anything in your instance of Summon:

- Improved performance and an upgrade to SOLR 7.
- Match & Merge improvements
  - Added newsletters to merge process: Reduces the 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.
Relaxed language matching: resolved discrepancy between LanguageDetected and sys_language.

Standardized quotation marks: Ensure different formats (" vs “ vs ”) don’t prevent merging.

Better handling of synonyms: variants such as Color vs. Colour.

• The ability to search for authors or co-authors by ORCIDs.

• New Sort Options:
  ◦ By author (Ascending)
  ◦ By title

New Enhancements

In addition to performance and system improvements, there are some new features available with CDI as well. Check them out in the preview environment now, and remember you’ll will need to activate them in your production environment after the release goes live if you want to offer them to your patrons.

Enhancements include:

• Author/creator facet: Go to Settings > Facets and move the Author Facet to the Enabled column.

• Collections / Database facet: Go to Settings > Facets and move the Database Facet to the Enabled column.

And a variety of fixes and improvements for specific customer needs.

November 6, 2019

Below are some details for features in the current release, which were highlighted in our most recent Summon Update and Q&A webinar (YouTube video, WebEx recording, or PDF file).

Enhancements

• Video Improvements
  ◦ Addition of more video thumbnails via Syndetics and publisher content
  ◦ Addition of play icon that takes you directly to the video content when available

• Topics Explorer Enhancements
  ◦ Improved process for updating Wikipedia content to allow for more frequent updates

• Unpaywall:
  ◦ Addition of links directly to PDFs or full text from Unpaywall, where appropriate
  ◦ The default label for these links is “PDF”; this can be changed on the Translations page in the Summon Admin Console
  ◦ The functionality can be turned on or off; you can find this under Settings > Search Results, labeled “Display Unpaywall PDFs.”
  ◦ Currently the Unpaywall link is not linked to the Open Access indicator or the Full Text or Open Access facets; we will continue to improve this functionality in 2020
- **Linked data**: phase 1 of site map for better placement of links in third party search engine results, such as Google
  - Enrichment of data for use in site maps
  - Site maps for use with search engine crawlers should be available in Q1 of 2020

- **Uniform Titles**: the uniform title field can now be part of the default search for Summon
  - We will follow up in Q1 2020 with process for updating field mapping

- **Advanced Search Improvement**: added Match All, Match Exact, Match Any to advanced search form
  - Options will appear under the search box when either Title or Publication Title is selected
  - **Match All**, labeled “all words anywhere,” will return only results that contain all words in your search
  - **Match Any**, labeled “any of these words,” will return only results that contain any of the words in your search
  - **Match Exact**, labeled “Exact Match,” will return results that contain an exact match for the phrase included

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**August 7, 2019**

Below you will find highlights of user-facing improvements and bug fixes for this release.

**Enhancements**

- **Display of Public Notes in Summon (NERS)**
  - You can now display any public notes or location notes as part of the results in Summon.
  - Public notes and location notes can be individually turned on or off.
  - You will find the option to turn each on and off in the Summon Admin Console, under Settings: Search Results.
  - You will find documentation about this feature [here](#).

- **Improved Facet Controls (NERS)**
  - You can now set the order of facet display and whether the facet is expanded or collapsed by default; you will find these settings under Settings: Facets in the Summon Admin Console.
  - We added an icon by facet headings to indicate if the facet is expanded or collapsed.
  - You can also set the background color for the facet pane using hexadecimal color codes; you will find this setting with your other custom colors under Settings: Summon 2.0 Customization.
  - You will find documentation about this feature [here](#).

- **Other Fixes and Improvements**
  - Use of the Open Access facet is now included in OBI reports (Idea Exchange).
  - Addressed issues affecting links with diacritics encoding.
  - Improved logging and error reporting for sending of the Content Ingestion Report.
May 15, 2019

Below you will find highlights of user-facing improvements and bug fixes for this release.

Enhancements

• Glanceability
  ◦ Allows your patrons to identify whether a specific resource is an original research article or analysis and will also include the length of the resource if available; type of resource is identified by reviewing subject terms, titles, and subtitles for the journal article content type.
  ◦ Can be turned on or off in the Summon Admin Console, under Settings > Search Results using the control labeled Research Article Identifier.
  ◦ Find documentation about Glanceability here and how to configure it here.

• Related Items
  ◦ Provides your patrons the ability to gain easy access to related Book Reviews and Chapters in the right-hand pane, just by clicking a link in the search results.
  ◦ Turn the feature on or off in the Summon Admin Console, under Settings > Search Results using the control labeled Related Items.
  ◦ Find documentation about this Contextual Relationships feature here and how to configure it here.

• Other Fixes and Improvements
  ◦ Addressed issue with "Search" tab from "Cites" or "Cited by" that prevented users from returning to original results after applying filters.
  ◦ Fixed issue with availability message displaying Full Text Online when it should be Check Availability for some print materials.
  ◦ Addressed issue with Gale Virtual Reference Library entries in Topic explorer where the Read more link leads to a 404 error.

February 6, 2019

The following enhancements will be available in our preview environment from January 23 to February 5.

Enhancements

• Citation Trail
  ◦ Enables patrons to view a list of cited and cited by records for records returned in search results.
  ◦ Allows users to follow the trails of each citation for further exploration.

For more information, see Summon: Citation Trails.

• Configuration of Topic Sources
  ◦ Configure, turn on, and prioritize topic sources for the encyclopedia entry for Topic Explorer via the admin console
Enhancements

• **Enhanced Autocomplete**
  
  ◦ Suggested autocomplete entries will now make recommendations first based on searches from your institution, and then on searches in Summon overall.
  
  ◦ Autocomplete will also include Best Bets, Database Recommender and Topics as suggestions; display will only appear if you have these features activated in your instance of Summon.
  
  ◦ This is opt-in; if you do not turn this on, your site will continue to use the previous autocomplete.
  
  ◦ Documentation on how Enhanced Autocomplete works can be found [here](#).
  
  ◦ Documentation on how to configure this functionality can be found [here](#).

• **Microsoft OneDrive Support for Saved Searches**
  
  ◦ For Saved Searches, users can save searches during a single session, or they can log into Google Drive or now Microsoft OneDrive.
  
  ◦ This is configurable; you can offer your users either option or both for saving their data.
  
  ◦ Documentation for Saving Searches can be found [here](#).
  
  ◦ Documentation for enabling Saved Searches can be found [here](#).

• **Course Reserves View for Summon over Alma: Browsing and Search Improvements**
  
  ◦ Summon over Alma customers can now turn on a Course Reserves tab in the Summon User Interface.
  
  ◦ Users can browse a list of all courses and sort by Course ID, Description or Instructor.
  
  ◦ Users can also limit the list by searching on course name, description or instructor.
  
  ◦ In order to activate this functionality, you will need to create a key for the Alma Courses API and enter that into the Summon Administration Console; detailed instructions on how to configure this can be found [here](#).
  
  ◦ Documentation on using the Course Reserves View can be found [here](#).

• **Improved DOI Support**
  
  ◦ DOIs in the Summon index are now case insensitive, which should result in increased frequency of matches.
This Summon® maintenance release also includes some improvements for our customers using Summon and Alma. Because this is a maintenance release, there will not be a preview window specifically for this release. Below you will find highlights of user-facing improvements and bug fixes.

**Enhancements**

- Course Reserves now have Searchable IDs in Summon
  - Matching results are now returned when a searchable ID is input as a search term
- Remove 100 filter limit in Course Reserves facet
  - By default, filters return a maximum of 100 facet values; for course reserves, we want to expose all values
    Now, all values for Course Instructor and Course Name and Number will display, with no limit
- Improved access to API key for Summon over Alma customers
  - You can now find your Summon API Key on the Summon over Alma dashboard institution detail page under Summon Sites
    The API key will also be added to the default implementation email
- Summon over Alma services link language settings
  - This fix aligns the selected language in the Summon User Interface with the Alma My Account, Journal Search and ILL Services links in the top navigation
    Previously this defaulted to English; now it will match the language selected in the Summon User Interface
- Suggested Librarian address field display
  - Addressed a bug related to suggested librarians—if an address is available for a library contact, it should now be displayed in Topic Explorer
- Permalink display issue resolved
  - Previously the Permalink icon would remain in the search results even if this feature was disabled in the Admin Console; now applying this setting in the Admin Console will be reflected in the Summon user interface

For more details on the enhancements described below, please review our release overview (PDF) or our recorded release preview (YouTube or WebEx).

**Enhancements**

- Increased Frequency of Catalog Additions
  - Catalog adds will now be processed in 24 hours or less, and in many cases within the hour
  - Adds may take longer based on number of records being processed, current load on processing systems, and other factors
Twice weekly, during search index updates, catalog adds will be paused temporarily; this will usually occur on Sundays and Wednesdays and may last up to 12 hours.

For Summon over Alma customers, adds will be processed with your daily update.

Starting Monday, you will be able to see change in the preview environment for any catalog updates containing adds that are processed during the two-week period.

Both the Production and Preview environments will be synchronized once a Search Index Update is completed.

Documentation can be found here.

- Journal Ranking Boost for Relevance
  - We are testing various relevance algorithms that include a boost based on a records’ journal ranking, beginning August 1, using a small percentage of production traffic.
  - Journal ranking is based on the SJR Indicator, and data is provided by the SCImago Journal & Country Rank (https://www.scimagojr.com/).
  - We will analyze the candidates to determine the best solution.
  - The best solution will replace the current algorithm for all searches in the next maintenance release.

- Multilingual Search Improvements
  - The Korean Hanja-to-Hangul transliteration filter now handles cases where multiple readings are available.
  - The current dictionary has been updated and now covers variations of Hanjas, such as 医 vs 医 and 金 vs 金.
  - Increased and improved English synonym list to address spelling variations such as “Paleopathology” and “Palaeopathology”.

- Improved French and German Did You Mean Functionality

- Updated term dictionaries for both German and French.

- Enhanced Did You Mean to provide a language boost; when French or German are selected for the user interface, suggestions in that language are given a boost (similar boosts are in place for Japanese and Chinese).

- Temporary Saved Search Folder
  - Users can now add searches to the Saved Search Folder without signing into Google Drive.
  - If users want to save searches beyond their current session, they will need to log into Google.
  - Documentation can be found here.

**Newly Indexed Content Highlights**

We have recently added or updated the following commercial content packages in the Summon Index:

<table>
<thead>
<tr>
<th>Collection Name</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bloomsbury Academic Books</td>
<td>Bloomsbury Academic</td>
</tr>
</tbody>
</table>
June 6, 2018

Enhancements and Improvements

• Opting Out of Merging Catalog Records
  ◦ Now, the Catalog Merge Settings page under Content Ingestion allows you to specify which catalog collections are excluded from the merge.
  ◦ Changes to this configuration will be included in the next scheduled search update.
  ◦ This was one of the ideas proposed in the Summon Idea Exchange
  ◦ Documentation can be found here.

• Korean Hanja-Hangul transliteration improvements
  ◦ The Hanja-to-Hangul transliteration filter now handles cases where multiple readings are available.
  ◦ The current dictionary has been updated and now covers variations of Hanjas, such as 醫 vs 医 and 金 vs 金.

• Search within a Journal now displays for Chinese, Japanese and Korean characters
  ◦ Search within a Journal rules for matching have been modified to accommodate title searches in Chinese,
May 9, 2018

Enhancements

For more details on the enhancements described below, you may want to review our release overview or our recorded release preview.

• Save Searches
  ◦ Summon users can save and manage searches. Searches can be via a user’s Google Drive account.
  ◦ Users, if they choose, can log into their Google account at the time of saving a search in order to save searches.
  ◦ This feature can be turned on or off for your institution via Summon customizer and is off by default.
  ◦ This was one of the top voted on ideas for the Summon Idea Exchange in 2017
  ◦ Documentation can be found here.

• Advanced Search Form Customization.
  ◦ Clients can customize the Advanced search form, including configuring the number of search fields, setting search option values, and enabling/disabling filters and filter values.
  ◦ Documentation can be found here.
  ◦ This feature was a product of the ELUNA / IGeLU 2017 New Enhancement Request System (NERS)

• Topics Explorer Improvements
  ◦ Increased frequency of display: previously Topic Explorer only displayed if there was a corresponding encyclopedia entry for any keyword match; now, if there is a match to a topic, Topic Explorer will display any associated content, such as Research Guides, Suggested Librarians, or Related Topics
  ◦ Display customization: in the Summon Admin Console, you will be able to set the order of the various elements of Topic Explorer (Encyclopedia, Suggested Librarian, Research Guides and Related Topics) using a drag and drop
interface; you’ll also be able to turn these elements on or off for your institution

- You’ll also be able to determine which element in the right-hand column is displayed first, Custom Panes or Topic Explorer
- Documentation can be found here.

- Search within a Journal: alternate activation via the user interface
  - Users can now constrain the Summon search box to search within a specific journal by clicking on the journal title in any search result
  - No action is required to enable this functionality
  - This idea was originally proposed via the Summon Idea Exchange

- Addressed infinite scroll issue: switching between tabs previously would result in the page returning to the top of the results set; now your position on the page should be maintained as you navigate between browser tabs

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**February 7, 2018**

**Enhancements**

For more details on the enhancements described below, you may want to review our release overview or our recorded release preview.

- Allow library to set if electronic or print item displays first
  - Currently if you have multiple sources for a result the links are sorted with catalog items listed before non-catalog items and electronic resources before physical resources. This functionality allows you to prioritize physical resources above electronic.
  - To activate this, select “Search Results” from the Settings tab in the admin console. The very last setting in that pane is “Merged document physical priority.”
  - Turn this on if you want print or physical items to take priority over electronic items
  - This feature was a product of the ELUNA / IGeLU 2017 New Enhancement Request System (NERS)

- “Add results beyond your library…” should not appear when results refined to catalog
  - When results are constrained to the library catalog, there are no results beyond your library to add, and as such, this filter does not apply.
  - Now, if a user constrains their results to only the catalog, this option will not appear; if the user clears that constraint, the option will reappear.
  - This feature was a product of the ELUNA / IGeLU 2017 NERS

- Custom Location Mapping
  - The Mapping tab in the admin console will now include a form for requesting location mapping changes

- Configurable force redirect to HTTPS
  - While your site may be HTTPS compliant, URLs from outside of your site (such as links from bookmarks, emails or typed in the browser’s address bar) may be referred across HTTP rather than HTTPS
  - Activating this feature will direct the traffic over HTTPS regardless of the original URL
  - You can turn this on or off for your institution

Ex Libris, a ProQuest Company
• Java8 Upgrade
  ◦ Our production environment will be updated to Java 8 as part of this release
  ◦ For the most part, this upgrade should be transparent
    • The API and User Interface should not be affected by this upgrade
    • This predominantly impacts internal tools and should resolve some outstanding issues with RTA
    • While we have done extensive quality assurance in our testing environments, configurations within your connections for RTA may vary from our test environments, so please check your links.

Product Improvements and Issue Resolution

In addition to the above functionality, we have addressed the following issues:

• Resolved an issue in the Chrome browser that was causing the Detail Page to unintentionally scroll when the Saved Items dialog box is present
• Previously, emailing a result did not include location and call number (both of which are displayed in the result preview); now both are included in the email
• Addressed conditions causing certain item from a specific institution to be excluded when "Items at my Institution" filter is applied
• For Topic Explorer, addressed issues to ensure simplified Chinese is displayed when the User Interface (UI) is set to “simplified Chinese” and traditional Chinese is displayed when the UI is set to “traditional Chinese”

Newly Indexed Content Highlights

We’ve recently added or updated the following commercial content packages in the Summon Index:

• CAIRN
• Nomos e-Library
• Canadian Electronic Library
• IHS Jane’s
• Infobase Films on Demand
• 19th Century British Pamphlets
• Preselect Media
• Westlaw UK
• Brill Books Full text
• SciELO

November 15, 2017

Enhancements

For more details on the enhancements described below, you may want to review our release overview or our recorded release preview.

• Search within a Journal
  ◦ When a user searches for a journal title, a link to constrain your search to only within that journal will appear
  ◦ Clicking the link will limit that search and any additional searches to that journal until the user clears the limit
  ◦ Matching requires a match of at least 3 words to the journal title or match an acronym
  ◦ We’ve modified the matching to be more tolerant of capitalization and punctuation and adjusted our requirements
for matching so that more searches should surface the link more frequently
◦ In order for an acronym to match it must be capitalized
◦ You need to turn this on before it will appear in your instance of Summon; instructions on how to do so are found [here](#)

- **Custom Panels in the Right-Hand Column**
  - Now you can easily create and display blocks of rich HTML or custom widgets in the right-hand column on the Search Results page
  - These panels can include rich HTML or JavaScript
  - They can be set to display only when triggered by a keyword or to be persistent for all searches
  - Please test your custom JavaScript; most issues identified in the preview environment were addressed by addressing issues within the custom script
  - You need to activate this feature and create your custom panels before it will appear in your instance of Summon; instructions on how to do so are found [here](#)

- **Search Form Improvements**
  - On the Search Results page you can add a “New Search” button that allows users to clear a search with as single click, which includes search terms, applied filters, rights panel content and search results
    - Currently there is no way to turn the “New Search” button off; if you wish to remove this feature from your instance of Summon, under translations, change the label from “New Search” to a single space
    - Also, the New Search feature does not clear the Search within the Journal feature if it is active; we will resolve this in a future release
  - You can also clear only the search terms using the Clear icon in the search box
  - You can now add a second Search and Clear button to the Advanced Search Form so that they appear at both the top and bottom of the form

- **Citation Query Improvements**
  - We have improved our relevance algorithm to better handle processing a search on a complete citation
  - Better handling of punctuation and other conventions within a citation style

**Additional Enhancements Available Outside the Quarterly Release**

Beyond these notable items, we are also making improvements that will be included as part of the November release but may not be visible immediately upon release. This includes increased frequency of rights updates, In Index reporting in Client Center, updates to the API documentation, and Citation Query Improvements. We will include more details on these features as part of the release.

- **Increased frequency of rights updates**
  - As part of the November 15 release, we will be increasing the frequency of updating rights for your institution
  - If the content is already available within Summon, you can add or remove it to your instance of Summon and the change will take place within 48 hours or less
  - In most cases, if you make a change today, by end of day the next day your changes will be visible
  - Changes to your catalog records, addition of new content or changes to existing content will still be processed as part of our twice weekly Summon Index Updates
  - While this functionality will be live in the production environment starting November 15, you will not be able to see the increased frequency of updates immediately
    - In order to ensure rights are being processed properly, for approximately two weeks after the release, we will run this new process in parallel with the current twice weekly updates
    - During this time we will be reviewing and comparing the two processes to ensure everything is performing as expected
    - Once we have validated that this process is performing as expected, we will replace our current process with the new one

Ex Libris, a ProQuest Company
• We will send out notification once this switch has been made

• In Index reporting in Client Center
  ◦ This reporting, which displays in the client center or in Intota, indicates whether a database is indexed in Summon and provides the database’s coverage percentage in Summon
  ◦ This should appear in your instance of Summon within 24-48 hours after the initial Summon November release

• Updates to the API documentation
  ◦ We have made numerous improvements to our documentation in the Ex Libris Developer Network
  ◦ Improvements include better and more consistent formatting, inclusion of examples, and addressing broken links
  ◦ We’ve also added more details around Availability and support for creating your own Topic Explorer
  ◦ We will follow up with links to specific changes by the end of the week

**Bug Fixes**

In addition to the above functionality, we have addressed the following issues:

• New Full Load Requests Improvements: Summon now allows requests for any catalog type (previously the form was limited to MARC and MARCXML) and allows for requests for Institutional Repositories
• Improved HTTPS support for creating off-campus login links
• Addressed outstanding login issues with OBI

**Newly Indexed Content Highlights**

We’ve recently added or updated the following content packages in the Summon Index:

<table>
<thead>
<tr>
<th>Provider</th>
<th>Collection Name or Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data-Planet by Conquest Systems</td>
<td>Statistical datasets</td>
</tr>
<tr>
<td>OECD (The Organisation for Economic Co-operation and Development)</td>
<td>UN Working Papers</td>
</tr>
<tr>
<td>SPIE</td>
<td>Books, Journals &amp; full text enrichment packages</td>
</tr>
<tr>
<td>CAIRN</td>
<td>Updated for new format for books &amp; journals packages</td>
</tr>
<tr>
<td>European Mathematical Society</td>
<td>Books &amp; Journals packages</td>
</tr>
<tr>
<td>Nomos e-Library</td>
<td>Journals &amp; full text enrichment packages</td>
</tr>
<tr>
<td>ProQuest Statistical Insight Tables</td>
<td>PQ GIS package for Statistical Insight Tables</td>
</tr>
<tr>
<td>Brill</td>
<td>Full text enrichment</td>
</tr>
</tbody>
</table>
July 26, 2017

Enhancements

For more details on the enhancements described below you may wish to review our Summon Update and Q&A webinar, specifically slides 21 through 41.

- **Search Course Reserves:** Customers with Summon and Alma can provide users the ability to search for course reserve materials
- **Controlled Vocabularies Search:** Subject terms are now enabled as search links, in the preview pane and on the catalog details page, enabling users to generate a new search with all elements of the subject term applied
- **Expand search results to 1,000:** You can configure Summon to generate 1,000 search results for your users, beyond the current 200
- **English Search Improvements:** Improved handling of punctuation and special characters, use of synonyms, and stemming
- **Improved Faceting:** New enhancements improve usability of the include and exclude functionality in the primary and more facets panes
- **Improved Header, Icon and Background Color Support:** You can now set custom colors for your icons and background in the header of the results page and set the right hand column background to white; note: you do need to configure these features for them to take effect
- **Preview Link Hover:** A preview is displayed when the user hovers over the preview icon, eliminating the requirement to click on the link to see the preview
- **Permalink placement improvement:** Permalinks are now both in the preview section and as an icon at the top of the result with a tool tip
- **OpenAthens Support:** Proxy support for OpenAthens

Beyond these notable items, we are also making accessibility improvements and enabling you to enhance results page design through better color contrast of icons and backgrounds. Refer to the Ex Libris - Summon - July 2017 Release Overview for more details and an overview of enhancements in the July release.

Bug Fixes

In addition to the enhancements above, we have resolved the following issues:

- **Resolved many outstanding issues with Resource Recommender and Bets**
  - Resolved issues preventing Community Tags from triggering a database recommendation
  - Addressed issue causing Databases to be listed out of alphabetical order in the admin console
  - Resolved issues preventing some Best Bets tags from triggering a Best Bet or causing them to appear intermittently
  - Now allows for addition of Chinese, Japanese and Korean characters as tags
Best Bets now supports use of all common special characters

- Added bulk importing to Best Bets
- Resolved issue preventing the deletion of some Best Bets tags

- Improved Topic Explorer to resolve issues with display of unrelated topics under Related Topics
- Addressed issues causing Topics to not display in certain versions of FF and Chrome
- Fixed Reserve Link (Reserve Button); previously changing the text in translations was not reflected in the User Interface
- Add link for RefWorks to the top-level links in the UI
- Add a "back to search" label to Saved items folder
- Allow '@' sign as any character of title including the first character position
- Improved support for CJK characters in the SubjectTerms field
- Apply Accessibility to bX Recommender feature
- Corrected an issue that prevented the first line in the citation format dropdown from being translated
- Addressed issues causing an HTTP STATUS 500 error in the FireFox browser on iPhones

Newly Indexed Content Highlights

We have recently added or updated the following content packages in the Summon Index:

<table>
<thead>
<tr>
<th>Provider</th>
<th>Collection Name or Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>McGraw-Hill - F.A. Davis PT Collection</td>
<td>Physical therapy resources</td>
</tr>
<tr>
<td>McGraw-Hill - HarrisonMedicina</td>
<td>Clinical medicine resources (Spanish)</td>
</tr>
<tr>
<td>Association for Computing Machinery (ACM)</td>
<td>Books</td>
</tr>
<tr>
<td>Elsevier - ClinicalKey ES guides and Techniques</td>
<td>Guides and Techniques currently Fisterra content only (Spanish)</td>
</tr>
<tr>
<td>Chemical Society of Japan</td>
<td>Journals</td>
</tr>
<tr>
<td>SOLIS</td>
<td>Updated for new format (Dublin Core) of research projects from the Federal Republic of Germany, Austria and Switzerland</td>
</tr>
</tbody>
</table>

May 3, 2017

Enhancements

We made the following changes to improve performance and usability with Summon:

- **bX Recommender - Related Articles feature**

You can now provide usage-based scholarly article recommendations to your users via bX Recommender.

Display related articles based on usage and relevance in the right-hand column.
• **Syndetics Unbound**

You can now easily add dynamic enrichment elements to your catalog detail page using Syndetics Unbound.

You can configure and utilize any of the available Syndetics enrichments with Summon. Available elements for enrichment include Title Recommendations, Author Information, Look Inside the Book, Series Information, Professional Reviews, Reader Reviews, Tags, Book Profiles, Awards and more.

This service requires an additional license fee beyond the standard Syndetics Summon subscription, but the license can also be used to power Syndetics Unbound in your traditional OPAC or other supported service.

Details in the Syndetics section of Summon [Admin Console Settings](#) article.

• **Open Access Identification and Filter (v1)**

You can now choose to identify and filter Open Access content in the User Interface with a new [Open Access indicator/icon](#) and [Open Access filter](#).

Open Access content will be marked with an Open Access icon.

Users can limit results to only Open Access content via a facet/filter.

Filtering by Open Access is also available as an option on the Advanced Search form.

There are currently over 200 million items in the Summon index that are identified as Open Access. We will be continuously updating this content on an ongoing basis based on feedback from the customer community and as we cooperate with more providers to properly identify open access content within their collections.

• **Resource Recommender Improvements**

Searching on a database name should now return the database as a [recommendation](#), regardless of capitalization or spacing.

Fixed issues related to capitalization and alphabetical ordering of database names in Resource Recommender.

• **Best Bets Improvements**

[Best Bets](#) bulk imports now allows for importing of tags.

Improved handling of some punctuation and special characters (`_@#`) in Best Bets tags, and support for special characters (`-._&@#/!$%^()+`_=0[:;?:><.*`) in the description field.

Better error handling for adding Best Bets.

• **Summon over Alma**

Summon now supports integration with [Alma](#) for both the Summon User Interface and for Summon API customers who also subscribe to Alma.

Summon / Alma customers will have access to the same features and functionality found in Summon.

**Additional Functionality Available to Summon / Alma customers:**

Services page
Delivery of patron account data in Alma

Ability for users to log in to view their account information

A customizable page that shows items checked out, holds, fines, etc.

Publish catalog data

Rather than the output from Voyager of new/changed records and the batch input into Summon, Alma will “publish” new and changed records from the Alma bibliographic database to Summon

These records will be picked up by the Summon indexing programs

Rights management for e-resources

Replacement of 360 Client Center with Alma

“Client Center” functions embedded in Alma

Single activation - there is no need to activate in both Alma and Summon, just a new process

- Discipline scoped searching

User can now limit and pre-filter searches to specific disciplines using the Advanced Search form.

- Additional Enhancements

When exporting search results and saved citations, you now have access to the Chicago 16th Edition (Notes & Bibliography) footnoting citation format in Summon.

Bug Fixes

Beyond the fixes and improvements listed above, we have also made the following issues:

- Translated the Help Page into German.

- Any changes made to the translations fields for citation format names will now be reflected in the UI.

- Addressed issues related to dynamically rendered views that were preventing Zotero from importing citations from Summon.

- Addressed issues that were causing the A&I Details Page to show Available in Print when there’s no print or electronic access.

- Titles that were appearing in the user interface without spaces between the words now have proper spacing.

- Improved HTTPS support so that thumbnail images that were not appearing in the UI due to redirects of the URL are now displaying.

- Improved accessibility so that tabbing through elements in the user interface now highlights the menu options when expected.

Preview Environment - Now Including Access to Your Admin Console

The preview environment for the May 3 release is available through May 2. In addition, you can now access the configuration options in your Admin Console. This will allow you to try different configurations in the preview environment. Details about accessing the Preview environment [here](#).
Newly Indexed Content

We’ve recently added the following content to the Summon Index:

- New York Public Library: New York Public Library Digital Collections (Open Access)
- Association for Computing Machinery (ACM): Association for Computing Machinery (ACM) (2009) - books
- Elsevier: ClinicalKey ES guides and Techniques
- Korea Scholar: Korea Scholar - Journals

February 1, 2017

Enhancements

We made the following changes to improve performance and usability with Summon:

- **Database Recommender and Best Bets Improvements**

  Improved how both are triggered for inclusion at the top of the results set.

  Resolved issues that were preventing database recommender from making recommendations when a user’s query matched certain tags associated with a database.

  Addressed issues preventing Best Bets from being recommended despite matching tags, particularly when automated query expansion is applied to a search.

- **Topic Explorer Improvements**

  Ensured the Suggested Librarian in the topic pane, if present, is drawn from the first displayed libguide, when available.

  Reinstated the Recommended Research Guide heading in the Topic Explorer pane; this heading was missing from this section after our latest release.

  Cleaned Wikipedia articles to remove HTML from within the entries.

Bug Fixes

Beyond the fixes and improvements listed above, we have also made the following issues:

- The Export to Citace.com from within the Save Items folder did not export any citation at Citace.com if you were not logged in to Citace.com prior to running the Export To function.

- For the Customizer in the Admin Console, the system was making numerous calls to the server to complete a task, slowing down responsiveness and increasing the potential number of timeouts that could occur: we reduced the numbers of calls to the server the customizer has to make to complete actions, which should result in better performance and show some improvement in availability.

- Logos were disappearing after authenticating via authentication banner: some institutions’ logos would disappear after authenticating via a proxy.

- SpringShare V2 Chat Widget was not appearing: a defect in the system resulted in the widget or widget availability not appearing on the top or right side of the page.
• We have refactored the menu system (used for the hamburger and phone responsive-size facets menu) to improve the overall layout on smaller devices and improve the implementation of responsive design.

• The Saved Items buttons were disappearing from A&I (Abstracting & Indexing) and detail pages in the phone view; now, from the A&I page, if you save an item, and then click the Saved Items button in the header you should see "Clear all" and "Options..." buttons in the header.

• A defect in the system would cause the Altmetrics badge to load despite Altmetrics being set to off for that site.

• A defect previously prevented the FavIcon from appearing in the browser tabs in FireFox. Now your FavIcon should appear in the tab for FireFox.

• Fixed errors that occurred that prevented emails from being sent when a user tried to email citations they have saved.

• Addressed issues preventing customers from registering new email addresses for the Content Ingestion Report within the Summon Admin Console.

Newly Indexed Content

We've recently added the following content to the Summon Index:

• CAIRN: Journals
• Oxford University Press: Oxford Very Short Introductions

December 15, 2016

Enhancements

We made the following changes to improve performance and usability with Summon 2.0:

• Query Expansions

We have added new Library of Congress Subject Headings to query expansions so that variants (as specified by the LCSH) are now used to expand queries. For example, a search for bionanotechnology is now expanded to include results for "nanobiotechnology" since "bionanotechnology" is a variant of "nanobiotechnology". Or science of language is now expanded to include results for linguistics since science of language is a variant of linguistics.

Please note that not all variant heading mappings from LCSH are included in the new query expansion. For example, healthcare is defined as a variant for the heading medical care in LCSH. This mapping is not included in the current query expansion data set because healthcare is a very common term, and it is probably not necessary nor desirable to expand the query for healthcare to include results for medical care.

Another new feature included in this release is the context-sensitive expansion feature. LCSH uses the notion of qualifying terms indicated in parentheses. For example, optimization (linguistics) is defined as a variant term for the heading optimality theory with the qualifying term linguistics. This means the term optimization used in the context of linguistics is a variant for the heading optimality theory. The new feature looks for both the variant term "optimization" and the qualifying term linguistics, and it does the expansion only if both terms are present in the query.

Examples:

• optimization >> no expansion
• optimization engineering >> no expansion
• optimization linguistics >> search expanded to include results for “optimality theory”
• linguistics optimization >> search expanded to include results for “optimality theory”

• Database Recommender Improvements

In addition to upgrading the overall recommendation service to use updated technology (now uses Java8, for example), now any database that you have rights to is available for recommendation. This means there are over 47,000 databases available for recommendation.

If you have Database Recommender activated in your instance of Summon, any databases you have rights to will be made available for recommendation by default. Customizing resources for recommendation is done via the Recommender page in the administration console.

We’ve also updated the navigation and search functionality for databases within the admin console to make managing these resources easier.

Also we have addressed outstanding issues or defects:

• Searching on a tag or name of a Best Bet in quotation marks now returns an appropriate match
• Better handling of different accents in Spanish and Catalan
• Best Bets now appear with Query Expansion

• Topic Explorer Relevance Improvements

We’ve improved the reliability and frequency of topic matching to provide more relevant topic recommendations. This includes:

• Better matching of longer queries; for example, English as a Second Language previously did not return a topic; now this search term can produce a match
• Better handling of close matches for longer phrases, to eliminate false matches; for example:
  ◦ Previously the topic stress in the workplace would trigger a match for a search for either ______ in the workplace or stress in the ______, so that lunch in the workplace or stress in the joints would result in the matching topic stress in the workplace; phrase matching (having 3 words in order) would trigger the match despite the disconnect
  ◦ Now we have balanced phrase matching with better term matching, so that the above examples no longer return the topic, but the following do: stress in the workplace, stress and workplace, stress from the workplace, and stress in a workplace
• The addition of JapanKnowledge as a resource available for topic content
  ◦ You need to have rights to this content in order to display it in the Topic Explorer, and the database is turned on as a Summon Topic by submitting a request to our Support team.

Note: all examples provided in these release notes may not be valid for your implementation of Summon. Generating a match is dependent on the source of your Topic Explorer content and how you have the service configured.

• Analytics

We are pleased to announce that with this release, we will be replacing our current reporting system with Oracle Business Intelligence (OBI). In addition to the launch of the initial dashboard, which includes reporting equivalent to our current set of reports, this release lays the groundwork for expanded reporting of events throughout the Summon interface.

A few things to note regarding this initial launch of OBI reporting:
• Logging of data will begin at the time of the December release

• We will run our current analytics platform, Urchin, and the new system, Oracle Business Intelligence or OBI in parallel while we validate the outputs of the new system

• Moving forward, 2016 data will be available in Urchin and 2017 will be available in OBI

• Reports will be made available after a complete month of data collection, at the beginning of February

• When the reports are live, you find the reports under the current Usage. Under that tab you'll find two sub tabs: Historical and Current. (Historical = Urchin and Current = OBI)

We will follow up in January with more details on the launch of our new analytics, including dates and support materials.

• Relevance Improvements: Subject Term Boost

With our December release, we are publishing a new relevance algorithm with Subject Terms having a higher influence in relevance. Previously subject terms were given similar treatment to other metadata found within the record; now subject terms are given a boost more similar to how Title or Author are treated.

This new relevance algorithm is one of six we tested with a Subject Term boost, and this candidate demonstrated the best performance for application of the boost as well as preserving performance for other types of searches, such as known item searches.

For example, the boost should only apply when query terms match specific subject terms and not when subject terms are found in other fields in the record. When searching on computational linguistics, the title foundations of Computational linguistics shouldn't be affected, since computational linguistics is not a subject term for this item. However, the title Readings in Machine Translations should get a boost since computational linguistics is a subject term in that record. Also, the title Japanese Computational Linguistics should get a boost because it also has computational linguistics as a subject term.

Note: Because relevance ranking is a complex calculation of multiple factors, actual influence of subject terms will be determined by the search parameters at the time of execution. Also, you may not be able to recreate these exact examples in your instance of Summon due to differences in the search configuration at the time of searching, including differences in content rights, configuration, and facets applied, for example.

• Bug Fixes

Beyond the fixes and improvements listed above, we have also made the following changes to improve performance and usability with Summon 2.0:

• Addressed issues that were causing the Summon search box generated by the Summon widget to disappear

• Corrected the placement of the spinner overlay icon in Right-to-Left interfaces

• Addressed issues with text appearing out of margin in the new Summon results page preview pane

• Removed "Indian" as a language option in Advanced Search Language dropdown

• Corrected issues with the MLA Citation format

Newly Indexed Content

We've recently added the following content to the Summon Index:
August 24, 2016

Enhancements

ProQuest released the following updates to improve performance and usability with Summon 2.0:

• Results Page Refresh

We have resolved a number of outstanding issues, have added some new functionality, improved usability and updated the overall interface on the Summon Results Page. These changes are not limited to but include:

• Use of the pop-out menu (sometimes referred to as the hamburger icon) on the top right of the desktop responsive design, mirroring the Summon interface for smartphones and tablets; this also now includes a link to the Search Widget Builder
• Facet pane improvements easier include and exclude, ability to search/filter long facet lists, addressed issues with location of Apply and Cancel
• New date picker, including suggested pre-formatted date ranges as links
• Better integration of the Preview pane; now displayed underneath each result, allowing for Topic Explorer or other content to persist in the right column and resolving interactivity issues
• WCAG (Level AA target) / Section 508 Accessibility Review which will include an update of our compliance checklist
  ° Summon accessibility documentation available in ProQuest's Accessibility Directory.
• Fixed the following bugs and customer-identified issues:
  ° Changed Permalink text to Permanent Link, added a link icon, and added a success alert after copy; this link can now be found in the expanded preview pane underneath each result
• Saved items dialog link now working correctly (sometimes it required two clicks, and the tooltip notification didn't work)
• Custom link and Widget Builder link aren't treated with the Custom Colors
• 'Back to Top' button is now centered and correctly behaves in its 'float' position
• Chat Widget no longer disappears when dragged all the way to the bottom of the screen
• Fixed some IE8 / possible IE9 icon issues that had to do with checkmark and facet edit button

The UI changes are a refresh of the interface based on your requests, user feedback, and improved functionality. An overview of the improvements is also available this PDF, and you can also view a recording of the improvements that were covered in the August Summon Quarterly Update webinar. To view the recording, click here or see the August 9 entry in Recorded Training Sessions and Special Event Presentations for 360 Services, Intota, 360 KB, Summon, and Ulrich’s.

Known Issues or Changes to the UI

To better prepare you and your users for the change, a few things we thought you should note:

• Custom scripts may not work with the new UI; we tested many of the common customizations to determine if they might conflict with the UI, and we found most should work; however, to be safe, you should turn off custom scripts and then test them as you turn them back on.
• The default colors for Summon will change slightly; the gray is a little darker to show better contrast with icons.
  ◦ For information on default colors see Summon 2.0 Customization section of Administration Console: Settings.
• If you’ve implemented custom colors, please check the icon contrast with your custom colors; you may need to adjust them to a slightly lighter or darker color.
• Custom links at the top of the Summon page will appear in the pop-out menu in the upper right hand corner of the browser; if you have implemented a custom link, you should check the link's font and style to ensure they are correct; you may need to apply your custom style to these custom links.
• We have addressed issues with longer links not working in Internet Explorer; a side effect of this is that when a user hovers over a link, the link will not display in the bottom left-hand corner of the browser.

• Topic Explorer Improvements
  ◦ Added many missing discipline- and subject-term-level topics to Topic Explorer
  ◦ Identified approximately 100 topics for inclusion by comparing current topics to HILCC, Library of Congress Subject Headings, FAST dataset and ProQuest's controlled vocabularies; the list of new topics is available in this spreadsheet
  ◦ Increased number of matches across all topic resources, including more matches for existing content sources and additional matches for Related Topics
  ◦ Increased likelihood of appropriate matching by mapping common terms to topics (such as ensuring accountant would trigger the topic Accountancy)
  ◦ Revised process for adding new sources for Topic Explorer to allow for easier addition of new sources for content
  ◦ Added the first additional resource (World Book) for use in Topic Explorer; more to follow

Bug Fixes

We have made the following changes to improve performance and usability with Summon 2.0:
• Resolved an issue in Internet Explorer with encoded URLs that would result in a Page Not Found error (HTTP 404 error)
• Revised response to HAN Proxy to address issues with Real-Time Authorization using HAN
• Fixed issue with browser back button not returning to Search Results Page From Catalog Details Page
• Resolved issue to ensure when full-text link is available, it should take precedence over print
• Issues with support for having multiple search box widgets on a single page have been resolved
• Removed extra period from MLA 8th Edition citations

Relevance

For this release we focused on improvements using Subject Terms and Controlled Vocabularies to improve relevance. We reviewed the application of LCSH, MeSH and Sears Subject Headings to determine their influence on relevance. Our investigations determined that the current algorithm uses subject terms and controlled vocabularies to influence relevance well. Summon queries already benefit from the matching to and influence of Subject Terms and Controlled Vocabularies and we will not be promoting any updates to the algorithm for this release.

We also identified potential enhancements to provide better visibility and controls for using Subject Terms and Controlled Vocabularies. For the December release, specific enhancements we are reviewing include improved faceting tools, subject term augmentation, and query expansion improvements.

Newly Indexed Content

We’ve recently added the following content to the Summon Index:

• McGraw-Hill: Access Science
• McGraw-Hill: Murtagh Collection
• OpenStax: eBooks
• SAGE: Knowledge Business Cases
• ProQuest: History Vault: Women at Work During World War II: Rosie the Riveter and the Women s Army Corps
• ProQuest: History Vault: Confidential U.S. State Department Central Files, Africa and the Middle East, 1960-1969
• ProQuest: History Vault: FBI Confidential Files and Radical Politics in the U.S., 1945-1972
• Parliamentary Library, Australia: Parliamentary Journal Articles
• Parliamentary Library, Australia: Parliamentary Bills Digest
• Parliamentary Library, Australia: Parliamentary Biographies
• Parliamentary Library, Australia: Parliamentary Members
• Parliamentary Library, Australia: Parliamentary Political Party Documents
• Parliamentary Library, Australia: Parliamentary Previous Parliaments
• Parliamentary Library, Australia: Parliamentary Press Clippings
• Parliamentary Library, Australia: Parliamentary Press Releases
• Parliamentary Library, Australia: Parliamentary Library Publications, Seminars, and Lectures
• Parliamentary Library, Australia: Parliamentary Senators
June 22, 2016

Enhancements

ProQuest released the following updates to Summon 2.0:

• Enhanced Search Widget Builder
  ◦ You can now build an embedded search box or widget using any of the facet and filter options available via the Summon 2.0 UI.
  ◦ Simply replace MyDomain with your library name in the URL http://MyDomain.summon.serialssolutions.com/widgets/, then follow the instructions.
  ◦ If you have already created search widgets or boxes using the existing tool, there is no need to recreate your search widgets or boxes unless you want to modify the criteria you originally used in creating it.

• Chat Widget Support Improvements
  ◦ Summon now supports integration with the QuestionPoint chat widget; you can activate your widget using the Enable QuestionPoint Qwidget section of instructions in our Chat Widgets article.
  ◦ We also improved integration with LibraryH3lp, allowing for the use of a custom widget created in LibraryH3lp rather than the default design, and changed the LibraryH3lp chat widget prefix from http to https.

• Citation Improvements
  ◦ Citation exporting now supports citace.com

• API Enhancements
  ◦ Faceting by Content Provider
    ▪ Ability to limit results to a specific content provider
    ▪ Initial release is API only, to support specific needs via the API

• Faceting by Database
  ◦ Ability to limit results to a specific content provider
  ◦ Initial release is API only, to support specific needs via the API

Bug Fixes

We have made the following changes to improve performance and usability with Summon 2.0:

• Infinite scroll "More results failed to load" error has been resolved
  ◦ This bug had an impact on a variety of components of Summon and could manifest itself and has been reported in a variety of ways, including:
    ▪ Newspaper facet with date limiter showing only 10 results regardless of actual number.
    ▪ Intermittent problems retrieving more than 10 items.
    ▪ Image Spotlighting triggering "More results failed to load" error.
    ▪ Content type filtering not working correctly with rollups filters.
    ▪ Filtering by "Newspaper Articles" on Date-Limited Searches Leads to Inaccurate Results Count Displayed.
• Translation improvements
  ◦ We continue to address outstanding translation issues as we work on improving the overall Summon experience, including resolving the following items:
    • Feedback form email is not translatable.
    • Translate About, Help, and Feedback Form Pages.
    • The button "Find Journal Article" and parts of the Mobile UI are missing Swedish Translations, and languages need to be localized in the drop down.
    • Fields controlling the labels for various citation services in the Saved Items folder page are missing or the translations are broken.
    • Application Error message displays only in English.
    • Missing translation for content types in the A&I page.
    • Some UI fields are not using translations file.
    • "Enter a valid date" message in Publication Date Slider isn't translated in non-English UI.
    • Updates for Spanish and Italian translations.

• Other Bug Fixes
  ◦ Feedback form no longer requires the user to enter an email address when your feedback form is set up for email address optional.
  ◦ Topics: When searching on various country names, Britannica is not returning results.
  ◦ UI issue on saved item section: overlap of RefWorks icon and link "clear all" overlapping with saved items folder icon.
  ◦ Browser back button does not return to Search Results Page from Catalog Details Page.

Results Page UX Improvements (Phase 1 - Planning and Testing)

At ELUNA, we announced we d have initial mockups for proposed improvements to the results page user experience. Over the next few weeks we will be soliciting feedback and conducting user testing to help us finalize the changes.

For now, you can find a preview of those changes on the Overview of Summon 2.0 User Interface Development Plans page. Included in the Overview PDF is information on how to provide feedback on the proposed changes. We will keep you posted on the results!

Newly Indexed Content

We have recently added the following content to the Summon Index:

• Encyclopedia Britannica: Britannica Online Japan
• German National Library of Economics: EconStar
• Edward Elgar Publishing Ltd: Reference Books, Reference Reviews
• Endocrine Society: Endocrine Press Journals
• Gale: National Geographic Virtual Library
• Hyweb: ERIC
March 9, 2016

**Enhancements**

ProQuest released the following updates to Summon 2.0:

- Permalink improvements, addressing some outstanding requests for additional functionality
  - You now have the ability to turn on or off the record display of persistent links (*permalinks*) to the item, as well as the ability to change the colors of links.

- Translation improvements
  - The language drop down for selecting the language in the UI will now display options in the native language.
  - Czech and Catalan help text have been added and updated.

- AGLC3 and Oxford citation styles have been added as export options in the saved items folder.

**Newly Indexed Content**

We have recently added the following content to the Summon Index:

- BookCube
- Cambridge University Press - UPO
- Ci o (Centre pour l’édition électronique ouverte)
- Igaku-Shoin (Japanese)
- Mcgraw-Hill Access Case Files
- Oxford University Press - Law
- Sage Research Methods Databases

January 20, 2016

**Enhancements and Bug Fixes**

ProQuest released the following updates to Summon 2.0:

- Addition of Altmetric to the Summon UI
  - You now have the ability to activate an Altmetric Badge within Summon. Altmetric Badges display information about an article’s scholarly impact as expressed through online, social media and news mentions.
  - For content that has associated Altmetrics, this badge will appear and will link to basic reporting from Altmetric.com. This reporting is available without subscription.
You can activate the Altmetric Badge within a Summon record and on the Summon Item Preview pane. The default setting is OFF. To learn more see the Altmetrics section of Summon: Administration Console: Settings.

- **Consortium:** Change Items at My Institution facet behavior to include all resources
  - Previously, limiting to Items at My Institution in a consortium setting for Summon included print material but excluded electronic resources available at your specific institution.
  - We've modified the logic so that the Items at My Location Facet now displays the resources a patron has immediate access to, both print and digital.
  - When the user selects the "Items at my institution" filter, the results include both 1) the library's electronic holdings based in their Intota or Client Center profile and 2) the catalog holdings from that individual institution only, not including content from other consortium members.

- **Bug Fixes**
  - LC call numbers now appear in the Item Preview pane in Summon 2.0. Previously Dewey call numbers appeared, but not LC call numbers. They will now show up in the preview pane. Individual institutions can turn this on or off for their specific instance - see the General section of Summon: Administration Console: Settings.
  - Improved ingestion of libguides for topics content; previously topic content processing added new libguides without discarding previous ones; this change should insure that the newest values will appear in the Summon Topic pane.
  - Corrected an issue with the email/export option regarding variations between the use of an abbreviation for edition and spelling it out; previously the email/export option would format the citation incorrectly if edition was spelled out.

**RefWorks Replaces Flow**

This week all interface labels and branding, within Summon and the Summon Administration Console, will be updated to reflect RefWorks instead of Flow. In addition, free individual access to RefWorks will be only available through the Summon interface. Read more about the Summon-RefWorks integration and the benefits it provides to your users through the Summon 2.0 interface.

- To learn more about Summon-RefWorks customization options, see Summon: Saving Items (Citations).

**Newly Indexed Content**

We have recently added the following content to the Summon Index:

- SAE International - Technical Papers
- The European Library
- Toyo Keizai - Journals
- SAGE Video
- Cognitive Sciences ePrint Archive
- Sabinet SA e-Publications

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**December 1, 2015**

**Enhancements and Bug Fixes**
ProQuest released the following updates to Summon 2.0:

- Improving the Facet Pane
  - Added Exclude functionality
  - Revised the "More Facet Pane" to improve readability and usability
  - Corrected issue with truncated Facet Labels and document counts
  - Addressed bugs related to tool tips, translation codes and facet counts

- Summon-SIPX Reading List module availability: Helps instructors who find quality readings in Summon share easily with students through ProQuest SIPX’s course materials solution. *(Subscription purchase required, early adopter pricing available for a limited time please contact sales@sipx.com or see here for more details. Learning Management System connection upgrades also available.)*
  - SIPX integrated into Summon’s Saved Items pane as an export option
  - Configuration settings added to the Administration Console

- Add ability via the Settings Page in the Administration Console to remove RSS Feeds in the Summon UI.
- Fix bug in Summon Search Widgets: Apostrophes can now be included in search terms.
- Fixed Saved Items bug: Full list of saved items are exported as expected.
- Summon Topics improvements:
  - Prevented unrelated topics from displaying in Related Topics list.
  - Improved topic retrieval from Wikipedia for searched terms to avoid inappropriate results.
  - Corrected 404 (page not found) errors when accessing Gale Virtual Reference Library via the Read More link.
- Fixed logo bug: Summon logo can now be uploaded successfully via the Settings Page in the Administration Console.

**Newly Indexed Content**

We have recently added the following content to the Summon Index:

- ACI - Scholarly Blogs
- The Audio Engineering Society
- Brill - Reference
- CAIRN - Books
- Cambridge University Press - Cambridge Books Online
- Cambridge University Press - Shakespeare Survey Online
- Database of Recorded American Music (DRAM)
- Edward Elgar Publishing
- GEOTAR
- HBO Kennisbank
- McGraw Hill - Access Physiotherapy
- McGraw Hill - Access Pharmacy
- McGraw Hill - Access Surgery
Overall System Improvements

Many of our development resources for this release have been focused on the continuation of the systems work described in our September release notes below and reviewed in our July and November quarterly roadmap review webinars (recordings available in the Support Center here).

As described in those webinars, we are working on shifting from our current datacenter configuration to a blue-green deployment configuration, as well as other fundamental changes to our systems. While this release represents furthered back-end work, the new configuration will not replace our existing system until the entire suite of work for this phase is complete.

We will continue to prioritize bugs, issues and enhancements for Summon as we work to improve the Summon platform.

September 23, 2015

Enhancements and Bug Fixes

- Improvements and bug fixes related to citations and citation formats, including the following formats:
  - Harvard
  - APA
  - MLA
- Fixed bug concerning Library Location facet not initially displaying
- Addressed issues related to simplified and traditional Chinese

Overall System Improvements

Many of our development resources for this release have been focused on the fundamental system changes reviewed in the quarterly roadmap review session (see the July 21 Summon Update and Q&A recording available on our recordings Support Center article). As described in that webinar, we are working on shifting from our current datacenter configuration to a blue-green deployment configuration, as well as other fundamental changes to our systems.

As a reminder, here are some of the benefits we should gain from completion of these system improvements:

- Faster deployment and system upgrades
- Zero downtime for new product releases and upgrades
- Capability for continuous integration and delivery
- Improve testability and overall quality (QA environment as close to production as possible)
• Improved process automation and management tools

This is also the first step and foundation for increasing the frequency for rights updates and content indexing.

While this release does represent some of that back-end work, this new configuration will not replace our existing system until the entire suite of work for this phase is complete. We will continue to prioritize bugs, issues and enhancements for Summon as we work to improve the Summon platform.

August 18, 2015

An update to Summon's relevance algorithm:

• Two primary improvements:
  ◦ **Improved balance between dynamic and static rank:** Summon's relevance ranking algorithm uses two types of relevance factors: the dynamic rank and the static rank. The dynamic rank factors describe how well a given query matches each record. The static rank factors represent the importance or value of each record. One common type of relevance issues we have observed in the past involve cases where the influence of the dynamic rank is too strong, such that records with low static ranks, such as old publications and less important content types, appear among the top search results. The new algorithm has a better balance of the dynamic rank and the static rank, and it should reduce the number of such issues.
  ◦ **Improved balance of short titles and long titles in the top results:** Previously, Summon's ranking algorithm tended to emphasize records with short titles, especially those that closely match the query string. The new algorithm reduces the influence of the field length normalization and the exact match boost, and as a result, top search results include a better mix of short and long titles that are relevant to the query.

• There are a number of other improvements being made in the new algorithm. One noteworthy property of the new algorithm is that short and general topical queries (e.g., linguistics, global warming) tend to return more books, eBooks, references and journals among the top results. And long and specific topical queries (e.g., linguistics universal grammar, global warming Kyoto protocol) tend to return more journal articles among the top results.

July 22, 2015

A patch release including the following updates:

• Added a Permalink to the Summon record display to make copying the persistent bookmark easy.
• RSS in Summon 2.0 no longer requires authentication.
• Addressed error with widget not accepting apostrophes in search, breaking external searches.
• Addressed conditions causing Application Error: Unexpected Search Error messages.
• Fixed bug concerning running a new search on a detail page failing to load the results.

June 30, 2015

**RSS Support for Summon 2.0:** In digging into the RSS feed issues, it looks like the errors can be caused by a variety of combinations, including the RSS feed plugin you're using for your browser, your authentication status within your network...
and your access method for your network, and the feed itself.

Basically, you need to be authenticated and using an up to date, current RSS reader. If other RSS feeds are working, then the issue probably has to do with authentication and the RSS feed configuration. If other feeds are not working, then it may be an issue with your RSS reader or plugin for your browser.

While I have had individuals contact me and say they have been able to use the RSS feeds without error, the steps involved to troubleshoot the issues I outlined above is more than should be expected by the end user.

I am working with the development team to modify the RSS feed to address any issues due to authentication. As far as any issues with a specific RSS reader or plugin, we will provide as best support for those as we can.

I will update the group when I have more to share with regards to changes to the RSS feeds.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

June 24, 2015

Enhancements

• RSS Support
  ◦ Note: This feature is not working in the production environment as expected. We are looking into the issue and appreciate your patience; updates will be posted.

• More details in the Database Recommender list of databases in the administration console; the list of databases now includes:
  ◦ DBID for each database
  ◦ Provider name for each database

• Improved deduplication rules:
  ◦ Better matching of Book/ebook titles on unique identifiers
  ◦ Improved deduplication of dissertation content type
  ◦ Improved Video Recording content type matching

• Improved rollups and spotlights:
  ◦ Ability to turn off Newspaper Rollups or Image Spotlighting
  ◦ Newspaper articles in a rollup are now removed from the search results
  ◦ Cleaned up related bugs - incorrect behavior for less than 3 results or repetition of results sets 3 or more times

Bug Fixes

• Printing search results from the browser results in a jumbled mess
• Email citation message text is required
• Application error appears when a change is made to the “results sorted by” option for some searches
• Preview Pane missing Publication Title field for Reference Content Type
• APA Citation format should include book edition information  
• Citation links for saved articles mixed up  
• Publication Date Facet: Issues with error checking and when entering two digit years  
• Translation editor setting are not getting translated: "No results were found for this search with your current filter selections. Try clearing your filters to improve your results”  
• Advanced Search:  
  ◦ User can bypass form validation by clicking Enter to submit Advanced Search  
  ◦ Advanced Search Icon not displaying in Chrome  

Newly Indexed Content  
We have recently added the following content to the Summon Index:  
• Brill - Books  
• Brill - Journals  
• Hebrew Periodicals  
• Boom Publishers - Books  
• BookUp  
• McGraw-Hill - Access Anesthesiology  
• Office of Publications of the European Union  

June 11, 2015  
Status Update  
I wanted to post an update regarding the current metadata issues with the Summon index discussed on the listserv. We have finished the initial cleanup of the metadata and are still in the process of updating the index. The majority of the work is done, however, we are taking extra care with each step, which takes extra time. Our revised ETA for completion is Thursday evening PDT, June 11.  

Upcoming Quarterly Webinars  
We will have our quarterly product roadmap series webinars on July 16 and July 17. As part of each webinar, I will go over what happened during the above metadata issue, what we are doing to ensure this does not recur in the future, and an update on our product roadmap. You can view the dates/times and register here. Dates/times are as follows:  
• July 16 at 10:00 AM PDT  
• July 16 at 4:00 PM PDT  
• July 17 at 7:00 AM PDT  
Please let me know if you have questions or if there is anything else I can do to assist.  

Brent D. Cook, Director, Product Management  
brent.cook@proquest.com
Enhancements

• Reducing duplicates in search results: We have made improvements to reduce the number of duplications caused by the following cases:
  ◦ Better handling of white space, punctuation and special characters
  ◦ Better subscript and superscript handling
  ◦ Better reconciliation between British and American English
  ◦ Expansion of synonyms map
  ◦ Addressed issues with stop words in other languages

• Ability to pass a language parameter in the URL; language detection will be done in the following order: URL for language parameter, browser settings, then Customizer default language setting. Details in the Languages section of the Settings page in the administration console.

• Improving the Catalog Detail Page with these additions:
  ◦ Added Subject Headings
  ◦ Added Request button

• Improving Advanced Search
  ◦ Added a tool tip to identify the icon upon hover
  ◦ Maintain Advanced Search data while navigating within Advanced Search
  ◦ The list of content types under "Show Content Type" in Advanced Search are dynamically generated from only the content types available to each client.

Bug Fixes

• Display related (graphical or results):
  ◦ Replace Font Awesome/Glyph icons with CSS/Unicode Characters
  ◦ Color not customizable including sources outside of this library's collection
  ◦ Off-campus login banner cuts off with long text in mobile view
  ◦ Titles disappearing in the mobile UI
  ◦ Libraryh3lp widget is not displaying as "online" when it is online
  ◦ "Reserve" button displaying when document is an electronic resource
  ◦ Facet sort order for "Sort Alphabetically" is incorrect under Chinese Languages UI
  ◦ Some records displaying with "Physical copy - Check Availability" when they should have a "Full Text Online" label
  ◦ Topic Explorer bugs, including issues with appropriate Credo resources appearing in topic pane, resolution of 404 errors, and corrected issues with some instances of Suggested Librarian

• Availability uilang feature now works in Summon 2.0
• Added timeout message for Saved Items inactivity
• Administration Console:
  ◦ Chat widget location of "side" is no longer reset to "top" when user saves unrelated changes in Admin Console
- Missing Translation - “Email sent successfully” label can now be customized

- Search related:
  - Advanced Search - Drop down list of choices is alphabetically organized in English (does not work for other languages)
  - When a user enters search terms in the advanced search screen and keeps refining their query, the subject terms no longer become nested in ways that are confusing and excessively limiting
  - IE11 cannot type Traditional/Simplified Chinese words in search box by Microsoft IME

- Catalog Detail Page related:
  - Citation Online link is fixed

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April 16, 2015

Enhancements

- Known item search enhancements - when a user is looking for a specific item and uses a combination of fields, this improvement to relevance should ensure returning the result in the top 10 (if not the top 5) results; fields used include:
  - Title
  - Subtitle
  - Author
  - Publication Title (for Journal Article)
  - edition (for Book/eBook)
  - Publication Year

- Persistent URLs - users can now copy or bookmark links in Summon and these links will allow for long-term support of linking to the content.

- Full text priority boost - ensures full text links are offered when linking to content for which there is both full text and A&I availability. Please note that this impacts linking only, it does not impact relevance ranking.

- Inactivity timeout on Saved Items folder is now configurable.

- Best Bets improvements
  - Bulk delete Best Bets
  - Bulk insert Best Bets via a CSV file
  - Edit an existing Best Bet

- Accessibility
  - Added labels to the search landing page and main page search boxes
  - Upgraded the date picker to ensure the calendar control is accessible via the keyboard, that modal/dialogs are available via the keyboard, and that users are notified of all events and texts via screen readers

- Flow Login link is now translatable and customizable.

- Results are now numbered to help users keep track of where they are in the results set.

- New HTML-based saved items email - addresses broken links in emails, corrected issues with citations, and email address is validated upon entry to reduce errors.
• Support for exporting to EasyBib.

• Improved error messages - if a specific aspect on a page does not load, we will now provide better error messaging; this includes if the "more facets" fails to load, if there's an error loading additional results during infinite scroll, and if there are any failures during exporting, emailing or citing documents.

• API improvements - now allows for differentiation between UK and US English and France and Canadian French, which also ensures correct language is set in the OpenURL links.

• Translations - feedback forms, forms on the UI and email fields are now translatable.

• Support for LibAnswers 2.0 Chat Widget
  ◦ Support will only be for 'Button pop-out' and 'Slide' widget types
  ◦ Will address known issue of Chat appearing offline when staff is available
  ◦ Will allow for better access to built-in LibAnswers 2.0 functionality
  ◦ Support for LibAnswers 1.0 and LibraryH3lp will not be affected and will continue to be supported

Bug Fixes

• Topics: Encyclopedia Britannica "Read more" link was previously not proxied, leading to broken links

• Improved cover image styling on Details Page to ensure images don’t overlap text

• Publication date is one day/month ahead of the choice

• BibTeX export has incorrect url and some missing content type labels

• Email citation feature missing full-text links when citation format is selected

• Month abbreviations in pub date slider persist in English when Welsh is selected as UI language

• Feedback form string "Type of Feedback" not getting translated

• Creating Best Bets description even if the text is less than 140 characters, upon hitting the Save button, the "description too long" error occurs

• Results from stemming appearing higher than verbatim matches

• There is no option to edit the text for "OCLC Number"

Newly Indexed Content

• Ambrose Video - video database with more than 500+ titles

• BCC Research - market research reports

• Chadwyck-Healey - content from the Annual Bibliography of English Language and Literature (ABELL) available through ProQuest

• CLEO (Centre pour l’ édition lectronique ouverte)

• Gale/Cengage - Health and Wellness Resource Center

• Gale/Cengage - Infotrac Newsstand

• Gale/Cengage InContext - periodical titles, main reference titles, and additional virtual reference titles

• Gale/Cengage Literature Resource Center - main reference and periodical titles

• Georg Olms Verlag AG - includes reprints of works with new introductions, afterwords, notes or indexes

• Infobase Learning's Films on Demand

• Institution of Engineering (IET) - journal content for indexing, along with metadata and abstracts with separate PDF full
April 10, 2015

Status Update

I wanted to give you an update on the current release and search index updates.

Our New Release

We believe we have identified the issues that were causing the link problems with our new release. As I mentioned earlier today, the errors were an aftereffect of our recent system upgrades. Publishing the release to production identified discrepancies between our data centers and resulted in the links not working intermittently. We are in the process of resolving those discrepancies and will complete the release process as soon as possible.

Why is this important to you? The errors are not reflective of the quality of the release, but rather reflect the complexity of our server environment a complexity that with every system upgrade and release we are simplifying and improving. But please note, this release will still contain the improvements and fixes I covered in the webinars this week.

Timeline Moving Forward

In the short term, we have rolled back our data centers to the previous version of Summon to ensure stability and reliability while we address the issues at hand.

For the next ten days, the planned release and index update schedule is as follows (all dates PDT):

- We have initiated a Search Index Update, which should be complete and available on Sunday, April 12.
- We will resume the product release early next week. We are reviewing our release plan and current traffic patterns for usage on Summon in order to align our activities with the times of day that will reduce any potential impact to your patrons.
- The release is now scheduled to go live on Wednesday, April 15. Prior to the release, we will be confirming that we have resolved the identified issues in both our testing and staging environments.
- We will resume our regular schedule for search index updates after that, with a new index available on Friday, April 17.

Improving Communications

As was noted on the listserv, there was a delay in messages making it out to some members that exacerbated the outage on Wednesday. We are monitoring and reviewing the situation to determine the best way to resolve this moving forward. I will keep you updated on how this is progressing.

Quality of the Release

I am confident that once the release is live across all our data centers that you will be pleased with the changes you see. We have done everything we can to ensure that s the case. But, as discussed earlier today on the listserv, even the best test environment can never replicate the live environment and there is the possibility for error. We monitor our releases closely so we can react quickly if an issue does arise.
If you see something that causes concern, please continue to contact customer support first as many of you did Wednesday. Although we monitor the listserv and will respond to any issues reported there directly, the shortest path to resolution is through our customer support.

If I neglected to address anything in my email above or if there is anything else I can do to assist, please let me know.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

March 24, 2015

Status Update

I wanted to send out an update on our upcoming quarterly webinar and invite you to join us at ACRL at the end of the month if you are going to be attending.

Upcoming Quarterly Webinars

I have had a variety of individuals tell me they cannot attend the sessions as scheduled but cannot make them due to conflicts (including ACRL travel or prep work). In order to be as inclusive as possible, we have decided to shift these out a few weeks to ensure as much participation as possible. The Q&A session is only as good as the questions you pose!

As such, these will be now happening at the times below. If you can’t attend a live session, go ahead and register so you’ll automatically get information when the recording becomes available in the Support Center:

- April 6 at 5:00 PM PDT, registration [here](#)
- April 7 at 7:00 AM PDT, registration [here](#)
- April 7 at 11:00 AM PDT, registration [here](#)
- April 9 at 7:00 AM PDT, registration [here](#)

As a reminder, these sessions will provide updated information on the latest developments with Summon and what’s in store for the next quarter. I will highlight late 2014 and 1st quarter 2015 service improvements, hardware development, and content additions, while providing details on our Summon and 360 Link roadmap.

Please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

March 2, 2015

Status Update

Due to issues with the Search Index Update process, the Index Update scheduled for Saturday, February 28 (PST) was not completed. We believe we have confirmed the source of the issue. As a result, content and subscription rights are current as of Sunday, February 20th until we complete the next update.
The next scheduled index update is scheduled for release Wednesday evening, March 4 (PST). If there are any additional delays I will notify you as soon as possible. Updates for this new target release will include any changes made up until Sunday March 1 (PST).

We apologize for this disruption in service. As always, we encourage you to subscribe to or periodically visit the Summon Index Update support center document to receive notifications of each update.

Please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

February 19, 2015

Status Update

We successfully completed our system maintenance which should result improved reliability and performance for the system overall through some server upgrades. If you happened to make any changes to Best Bets or to Database Recommender while we made these updates on either Wednesday or Thursday of last week, please double check your work to ensure it was not affected by the upgrade.

Following the upgrade, our kickoff of the next search index update was unavoidably delayed. The most recent update of the Summon Index was completed approximately 10 hours later than usual, on Wednesday, February 18 at 21:18 EST. The next update was started shortly afterwards and we expect this to be completed by Saturday EST.

Finally, our next product update is scheduled for mid-March. We are again focusing on improving the end user experience in the following ways:

• Known Item Searching Improvements
• Persistent Links
• Full text boost-prefer links to full text over citations
• The ability to edit Best Bets
• Integration of exporting citations to EasyBib
• Translation improvements - adding and improving which fields are editable
• Saved Items folder changes - making the timeout configurable by institution and setting the default for 120 minutes (it was previously 20 minutes)
• Support for Springshare's LibChat 2.

There will be a variety of bug fixes and other improvements included as well. Delivery of these features will be dependent on successful completion of testing in the upcoming weeks. I will send out more details as we get closer to the release date.

Please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com
February 11, 2015

Status Update

I wanted to give you an update on the planned system maintenance for this week. We are currently on schedule to complete this work by Friday. We will start our next search index update once the work is complete and should be back to our regular schedule next week.

Please hold off on entering any changes or new entries for database recommender or best bets until end of day this Friday (Pacific Standard Time) (Saturday, 8:00 AM UTC).

As part of the maintenance, we are upgrading the systems that support our Database Recommender and Best Bets functionality. Over the next three days recommendations and best bets should continue to perform as designed, and there should be no interruption of service to your patron. However, we do ask that you not add best bets or tags to database recommender between now and Friday. If you do, there is the potential that your changes may be lost in the upgrade and you will need to re-enter your information.

Again, your patrons will continue to get database recommendations and best bets you currently have in the system.

Please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

February 3, 2015

Status Update

Previously we had announced we would be doing system maintenance this week. Deployment and testing has taken longer than expected, so we will be rescheduling this maintenance window for next week. Because of the delay, we will have two index updates this week, which should go live on Wednesday and Friday. The week of February 9 13 there will be no search index updates.

We will conduct an update immediately after the maintenance work is completed.

I also wanted to thank everyone who made it to SummonCamp at ALA Midwinter over the weekend. It was a pleasure to get to see everyone in person. As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

January 23, 2015

Status Update

The week of February 2 we need to do some backend system maintenance that will result in increased reliability and improved performance for Summon overall. In order to accommodate this work, we will not have our regularly scheduled search index updates that week. We will have two index updates next week, as planned, and will resume indexing
immediately after the completion of the maintenance work.

We will resume our regular index update schedule the following week, February 9.

**Webinars**

A special thanks to Annette Bailey and Godmar Back for presenting a great webinar this week based off of their Code4Lib paper, *Hacking Summon 2.0 the Elegant Way*. One comment after the session was This is the best ProQuest webinar that I've been to. I hope everyone in attendance thought it was valuable and if you couldn't make it, we've archived it in our *Recorded Training Sessions and Presentations* answer in the Support Center, along with my December Summon Update customer webinar.

I also wanted to remind you that our training webinars for discovery services are now posted here with management sessions here. Remaining January discovery service training sessions that you may find of interest are:

- Introduction to 360 MARC Updates, January 27 at 8:00 AM PST - register here.
- 360 Link: Product Update and Q&A, January 27 at 11:00 AM PST - register here.

Remember, if you or one of your colleagues want to present to other Summon users at an upcoming webinar, please email my colleague at scott.schuetze@proquest.com so we can arrange it.

**ALA Midwinter**

I will be attending ALA Midwinter at the end of this month and look to meet many of you for the first time. If you want to set up a time to meet with me please drop me a note, or you can stop by the ProQuest booth (#2611) and ask if I'm there. The best bet is to drop me a note though.

And also remember, we are hosting upcoming Summon Camp there on Saturday, January 31. It'll be in the Continental Room A, at the Hilton Hotel, starting at 10:00 a.m. All details are posted on our event registration page. I should note that we are focusing more time on ensuring you get to talk with your colleagues. Some of these topics will be: customizing Summon, integration aspects (including LibGuides into Summon 2.0), analytics and usage, surveying user satisfaction, relevancy, and brainstorming product development ideas.

If you can't make it to Summon Camp, but have specific topics you'd like us to cover in future webinars, please fill out our brief survey.

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

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**January 13, 2015**

Enhancements to Summon 2.0

- Preview button for tablet and phone mode is now available via desktop mode. Provides an additional way to access the right side *Preview pane*.
- Feedback Form - the *form* for end user feedback is now available.
- API: Reliability Improvements better error handling
Bug Fixes for Summon 2.0

- Advanced Search: Changes to the Advanced Search settings in the administration console are now reflected on the Summon UI
- Fixed advanced search drop downs so they no longer display "A" in IE9
- Accessibility bugs addressed, including making Skip Navigation links act as regular links and correcting labeling on Advanced search, Saved Items Dialog toggle, and From and To buttons
- Facets/More facet pane counts should now be the same; they differed in some cases previously
- Resolved issue with cleaning saved items upon user closing the browser

Newly Indexed Content

- Vandenhoeck Ruprecht (Journals)
- getAbstracts (Abstracts for business books)
- RMIT Publishing EduTV (Streaming Video)

January 13, 2015

Upcoming Webinar: Hacking Summon 2.0 the Elegant Way

I just wanted to pass along a note that we are putting together some webinars to help you learn from others using Summon. The first of these webinars will begin next Tuesday, January 20 and will feature two of your colleagues from Virginia Tech. Details about the webinar are noted below. We will also record the session and make them available after the session.

These webinars will supplement the exchange of ideas that you currently benefit from during our various user group meetings and through traffic on this listserv. In the event that you have an idea for a webinar topic or would like to present, please send a brief email to my colleague at scott.schuetze@proquest.com.

Hacking Summon 2.0 the Elegant Way

Date: Tuesday, January 20, 2015 at 11:00 AM EST (7:00 PM UTC)
Registration: click here
Description:
Libraries have long been adding content and customizations to vendor-provided web-based search interfaces, including discovery systems such as ProQuest’s Summon service. Unlike solutions based on using an API, these approaches augment the vendor-designed user interface using library-provided JavaScript code. In this webinar, based on their Code4Lib paper Hacking Summon 2.0 The Elegant Way, you will learn how Virginia Tech University reverse-engineered the AngularJS-based Summon 2.0 interface to discover the modules, directives, controllers, and services it uses, and how they used AngularJS’s built-in mechanisms to add desired customization and interactions.

Presenters:
- **Annette Bailey**, Assistant Director for Electronic Resources and Emerging Technology Services, Virginia Tech: Annette Bailey is currently the Assistant Director for Electronic Resources and Emerging Technology Services for the Jean Russell Quible Department of Collections and Technical Services at Virginia Tech. Bailey serves on the Program Planning Committee for the ER&L Conference. She co-developed the open source LibX plug-in, for which she received the 2007 LITA Brett Butler Entrepreneurship Award. She won a National Leadership Grant in 2006 for LibX and in 2008 for LibX 2.0. Her role in Collections Technical Services is to ensure best practices are implemented as workflows and
data change for electronic resources.

- Dr. Godmar Back, Associate Professor of Computer Science, Virginia Tech: Dr. Godmar Back is Associate Professor of Computer Science at Virginia Tech, where he has been doing research and teaching in Computer Science since 2004. Dr. Back obtained his PhD from the University of Utah and worked as a post-doctoral scholar at Stanford University. His research interests are diverse, including operating systems, virtualization, web technology, scientific computing, programming languages, and library information systems. He is an active collaborator with librarians in the area of advancing library technology to ensure that modern technology can find its way into the library sphere. Since 2007, he has been involved in the LibX project, providing technical supervision and input. Recently, he has been leading the LibFX project (libfx.lib.vt.edu) which creates online visualizations of real-time library usage.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

January 7, 2015
Status Update

Due to some issues discovered during our testing and deployment of the release scheduled for today, we need to delay publishing the release until next Wednesday the 14th. Because of this change, we are executing a search index update now and will try to include a second this week as well.

The first search index update was initiated Tuesday, January 6 at 13:05 EST and should be completed on Thursday. We plan to kick off a second index update as soon as that one is completed, to be released Saturday.

To support the release going live on the 14th, next week we will have only one search index update, scheduled to begin Wednesday, January 14 and go live on Friday, January 16.

Recording of December Summon Update; Training Webinars

Thanks to everyone who attended our customer update last month. If you want to revisit any of the details or were unable to attend, you can find a recording in the Recorded Special Event Webinars section of the Support Center article Recorded Training Sessions. Schedules for our live training webinars are on the Training Webinars page, click The Summon Service and 360 Discovery Services or click 360 Management Services for training on our management products.

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

December 12, 2014
Status Update

We just completed our most recent Summon index update on Tuesday, December 9, at 21:14 EST (Wednesday, 02:14 UTC). Our next index, originally scheduled to go live on Friday, December 12 will be delayed by a day and will go live on Saturday, December 13. We needed to extend the window to allow for re-indexing some of our larger content sets as part of regular maintenance. We apologize for this.
As a reminder, we will for the weeks of December 22 and December 29, we will be publishing only one index update because of the holiday schedule. Index updates are expected to be published on Wednesday, December 24 and Wednesday, December 31.

Finally, if you haven't yet, please sign up for one of our two upcoming Summon customer update webinars on Thursday, December 18. We'll provide a more formal introduction to the current Summon team (myself included), review current work, share some of the details on our roadmap for the first quarter of 2015, and answer any of your questions. You can register for these events now and we will make a recording available to you after the event.

- Thursday, December 18 at 9:00 AM EST (2:00 PM UTC): register here
- Thursday, December 18 at 12:00 PM EST (5:00 PM UTC): register here

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

December 5, 2014

Status Update

We just completed our most recent Summon index update on Wednesday, December 3, at 02:24 EST (07:24 UTC). Our next index updates should be live today, Friday, December 5. We expect this regularity to continue after the beginning of the new year, though for the weeks of December 22 and December 29, we will be publishing only one index update because of the holiday schedule. Index updates are expected to be published on Wednesday, December 24 and Wednesday, December 31.

I also wanted to let you know about two upcoming Summon customer update webinars on Thursday, December 18. We'll provide a more formal introduction to the current Summon team (myself included), review current work, share some of the details on our roadmap for the first quarter of 2015, and answer any of your questions. You can register for these events now and we will make a recording available to you after the event.

- Thursday, December 18 at 9:00 AM EST (2:00 PM UTC): register here
- Thursday, December 18 at 12:00 PM EST (5:00 PM UTC): register here

Lastly, the ALA events team has recently assigned us our room for the upcoming Summon Camp at ALA Midwinter on Saturday, January 31. It will be in the Continental Room A, at the Hilton Hotel, starting at 10:00 AM. All details are posted on our event registration page.

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com
November 23, 2014

Status Update

We just completed our most recent Summon index update on Saturday, November 22, at 01:40:46 EST (06:40:46 UTC). Next week, due to the holiday schedule in the United States, we will be publishing only one index update on Wednesday, with the next index starting on Monday, December 1 and being published Wednesday, December 3.

I also wanted to remind you about the Summon Camp at ALA Midwinter in Chicago on January 31, from 10:00 to 12:30pm CST. You can register for this event now and we will contact you with the event location details as they become available.

I'm looking forward to meeting with many of you during this event and throughout the conference.

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
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November 12, 2014

Enhancements

- Improvements to reduce 404 errors
- Summon 2.0: Improved notifications to the end user related to browsing with cookies disabled
- Summon 2.0: Accessibility - Revised link colors to be fully WCAG 2.0 and Section 508 compliant
- Summon 2.0: Prioritize full text records over citations when selecting a record to drive linking behavior

Bug Fixes

- Search tracking in Google Analytics
- Summon 2.0: A&I Details Page - shows Available in Print when there is no print or electronic access
- Summon 2.0: A&I Details Page - Provider Name is missing in "Other Available Sources" section
- Summon 2.0: Corporate Author field/logic missing from Preview pane
- Summon 2.0: Availability for docs in the "Access this Journal Article in" section is not showing all participants' availability
- Summon 2.0: A&I Details Page - Incorrect display for "Request" button
- Summon 2.0: IE11 and Windows 8.1 page load fails
- Summon 2.0: Preview pane - Database field (labeled "Source") is not visible

Newly Indexed Content

- American Society of Civil Engineers - eBooks and Journals
- World Bank - Development Indicators
- New Alexander Street Press collections, including:
  - Asian Film Series Online
October 15, 2014

Enhancements

• **Accessibility** We have added improved keyboard navigation, modal dialog support, and ARIA alerts for enhanced accessibility. In our next release we will achieve WCAG 2.0 compliance by changing some text and link colors to increase contrast.

• **Advanced Search** Advanced Search users can select more than one content type as we have converted the Content Type drop-down to a multiple select option.

• **Faster page loads** We have increased the speed of page loads for Summon 2.0 by modifying the user interface so that assets load asynchronously.

Bug Fixes

• Improved visual cues for loading pages or apps running in Summon 2.0.

• Better support for Multiple Subject Terms.

• Improved BibTeX export in Summon 2.0.

• Improved Resource Link Prioritization in the Administration Console.

• Better translations support - Translations on detail pages are now also applied to the Summon 2.0 interface.

• Improved Advanced Search Tool - improvements to handling content types, fixes for revised searches, keyboard navigation fixes, better handling of parentheses in Boolean searches and other improvements in Summon 2.0.
Newly Indexed Content

- Bloomsbury Academic - Berg Fashion Library.
- Chadwyck Healey - Queen Victoria’s Journals.
- Chadwyck Healey International Index to Film Periodicals (FIAF).
- ChinaLaw
- Indian Journals

August 20, 2014

Enhancements

- Accessibility The Summon 2.0 interface now supports keyboard-based navigation.
- Flow Integration The new Flow integration can now be enabled/disabled from the Summon Admin Console. Watch the overview for Summon+Flow video.
- Right to Left Language Support Hebrew, Arabic and Farsi will now be displayed with the Summon 2.0 UI in Right to Left mode.

Bug Fixes

- Login Link The new Login link will now use the customized color for the links within the header.
- Saved Items The "back to basic search" link will now use the customized color for the links within the header.
- Language Dropdown - The options in the language dropdown will no longer use the customized color for the links within the header.
- Accessibility - Some of the links within the Summon 2.0 interface were missing an href attribute causing screen readers to not recognize the links.

Newly Indexed Content

- Hiperlink Egitim Iletisim - Hiperkitap offers over 7,500 e-book titles from 220 Turkish publishers. The database collection includes academic and general culture subjects: behavioral sciences, economy, environment, history, humanities, law, literature, management, medical and health sciences, music, philosophy, political sciences, and sports.
- Key Note - Provider of market intelligence in the UK - company reports, market research.
- Kyobo Book Center - Kyobo is the largest chain of book stores in South Korea.

July 9, 2014

Enhancements
- **Performance** Summon 2.0 will now use a global Content Delivery Network (CDN) to serve images, Javascript and CSS in a faster manner improving page load times.

- **Accessible Version** Summon 2.0 will now provide a link to an [Accessible Version](#) just as with the legacy Summon interface.

- **Highlighting in the Chinese Locale** Summon 2.0 will now support red font color for matching terms rather than bold font.

- **COinS and Record IDs** Each record in the search results of Summon 2.0 will now have a COinS and a Record ID to support javascript as well as tools such as Zotero.

- **Responsive Design** In the mobile view, additional metadata such as Publication, Date, etc. will now display in the search results.

### Bug Fixes

- **Screen Flash** In Summon 2.0, the screen will no longer flash when coming from an external search box.

- **Authentication Banner** The authentication banner will now disappear for sites that have it disabled in the Admin Console.

### Newly Indexed Content

- **ProQuest** - Black Studies Center Journals
- **ibooks.ru** - Over 6,000 educational, scientific and business ebooks from leading Russian publishing houses
- **Metapress** Maney - Maney Publishing - 18 of their journals that Metapress hosts.
- **Oxford University Press** - Oxford Handbooks Online
- **Oxford University Press** - Oxford Research Encyclopedias
- **Oxford University Press** - University Press Scholarship Online
- **udn.com** - Over 6,000 Chinese ebooks
- **Bloomsbury Berg Fashion** - Berg Fashion Library from Bloomsbury Academic includes the Berg Encyclopedia of World Dress and Fashion online, e-books, ejournals, and images
- **ProQuest** - European Books Online
- **Media Korean Studies** Includes the eBook collection and the Korean Anthology in History collection
- **Skillsoft Books 24x7 International** - Book collections in Spanish, French, and German
- **Skillsoft Videos** The Video Collections include Leadership Development Channel; 50 Lessons; Skillsoft IT and Desktop Videos
- **University of Chicago Press** Journal articles from the University of Chicago Press

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**June 3, 2014**

Enhancements

- **Scopus Times Cited** - Summon 2.0 will now display [times cited](#) counts from Scopus in the results for subscribers of Scopus.

- **Skip Navigation** - Summon 2.0 will now have "skip navigation" links allowing users of assistive technology to easier navigate the screen.

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Ex Libris, a ProQuest Company
Bug Fixes

- **Multiple Availabilities** - Summon 2.0 will now show multiple availability lines including Real-Time Availability in the same way as the legacy Summon interface.
- **Search Widgets** When using IE 10, IE 11 and certain versions of Firefox, searches would fail or result in a blank screen when starting with a Summon Search Widget.
- **Korean Language** When using certain versions of IE, various characters in the Korean language would not be processed correctly.
- **Interface Translations** Numerous terms in the Summon 2.0 interface have been made translatable.
- **Content Spotlighting** When a search results in only newspaper articles or only images with out a content type filter applied, the results will now display correctly.
- **Date Localization** The publication date picker was not localized on many languages other than English.
- **Changing Interface Language** When a user changes the interface language, the Topic Explorer will reflect the language change.
- **Advanced Search** Fielded search will no longer have quotes automatically applied.
- **Catalog Detail Page** Action button will now correctly display on the right hand of the screen rather than at the bottom of the page.
- **Advanced Search** A new field option for LC Call Number will be available. Dissertation Advisor and Dissertation Institution will be removed.
- **Items at My Institution** For consortium institutions, the Items at My Institution filter will now include only the library's electronic holdings and local print holdings, excluding records from other consortium members.
- **Authentication Banner** When marked as disabled in the Summon Admin Console, the Summon 2.0 interface will hide the banner.

Newly Indexed Content

- **American Mathematical Society** ebook collection.
- **Chadwyck-Healey** - Content from 19th Century Index, including Palmer's Index and Nineteenth-Century Short Title Catalogue.
- **Chadwyck-Healey** - DKV (Deutscher Klassiker Verlag), part of the Chadwyck-Healey German Literature collection.
- **Oxford University Press** - Oxford Reference Online.
- **PAGEPress** - An Italian publisher of about 45 peer-reviewed Open Access scientific journals covering several science fields including medicine, biology, zoology, agriculture, and others.
- **Swedish National Library** - The Swedish National Bibliography.
- **American Council of Learned Societies** - ACLS will include their humanities ebook collection comprised of over 2800 ebooks in the humanities, offered in collaboration with twenty learned societies, and 100 contributing publishers. ACLS adds 500 new books each year.
- **Central and Eastern European Online Library (CEEOL)** - C.E.E.O.L. is an online archive which provides access to full text PDF articles from 486 humanities and social science journals and re-digitized documents pertaining to Central, Eastern and South-Eastern European topics.
- **Spandidos Publications** The Spandidos Biomedical Journals.
• **Wordpedia.com** The Taiwanese provider Wordpedia.com has included metadata for 200,000+ journal records and 3,000 eBooks in Summon.

• **Wu-Nan Book Co. Ltd.** - A major academic and textbook publisher in Taiwan. During the last thirty years, Wu-Nan has published more than 2000 titles, mostly about social science. In the future, Wu-Nan will publish the subject of natural science. In recent years, Wu-Nan has translated more than 300 foreign works to Chinese.

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**March 19, 2014**

**Enhancements**

• **Responsive Design** - Summon 2.0 will now have different views based on the size of the user’s screen to optimize for the best experience.

**Newly Indexed Content**

• **CASPUR-CIBER Publishing** - The Italian publisher, CASPUR-CIBER Publishing, affiliated with the University of Salento, includes the scholarly journal Scires-IT and three monographs [http://caspur-ciberpublishing.it](http://caspur-ciberpublishing.it).

• **Chadwyck-Healey - AFI** - The American Film Institute (AFI) Catalog, the premier, authoritative resource of American film information, covers the history of American cinema comprehensively from 1893 to 1975, with full or short records for films from 1976-2011. New records are added each year by the AFI's editorial team.

• **Chadwyck-Healey - Cecil Papers** - The Cecil Papers are a privately held archive of approximately 30,000 sixteenth and seventeenth-century manuscripts, consisting principally of the correspondence of William Cecil, Lord Burghley (1520-1598) and his son Robert, the 1st Earl of Salisbury (1563-1612).

• **Chadwyck-Healey History Study Center.**

• **Chadwyck-Healey Johnson** - John Johnson Collection of Printed Ephemera. Offering unique insights into the changing nature of everyday life in Britain in the eighteenth, nineteenth and early twentieth centuries. Categories include Nineteenth-Century Entertainment, the Booktrade, Popular Prints, Crimes, Murders and Executions, and Advertising.

• **Edward Elgar Publishing Ltd** - Edward Elgar launched their own platform for Ebooks (elgaronline).

• **European Journal of Economic and Political Studies.**

• **Health Communications Network** - The Australian publisher Phoenix Medical Publishing Pty Ltd has included the AusDI Advanced online medicines information resource. AusDI Advanced includes full-text, evidence-based drug, drug-class and complementary medicines monographs, product information (PI), consumer medicines information (CMI) leaflets and medicines images with fully searchable attributes.

• **JSTOR JSTOR Ebook Collection**

• **Maruzen E-book Library**

• **NBC - NBC Learn Higher Ed** - collection of primary source videos, newsreels, and documents that can be used for research, projects and in classroom and online teaching. Includes over 10,000 resources - short 2 to 5 minute videos aligned to 28 Higher Ed courses - topics range from Biology, Chemistry, Physics, U.S. History, Global Studies, Health & Nursing, Psychology, Business, Marketing, Journalism, Sociology, and more.

• **Nordic Council of Ministers** - The Nordic Council of Ministers is the forum for Nordic governmental co-operation. The publications department publish about 200 publications per year, including project reports, which may form the basis for political decisions (TemaNord series), and publications that communicate political messages (ANP series). [http://www.norden.org/en/publications](http://www.norden.org/en/publications).

• **Oxford University Press - Oxford Scholarly Editions online.**
Yerk re Tan t m ve Yay nc l k - All available issues of the Turkish journal Sisli Etfal Hastanesi Tip Bulteni/The Medical Bulletin of Sisli Etfal Hospital. [http://www.sislietfaltip.org/default_eng.asp](http://www.sislietfaltip.org/default_eng.asp).

Slack Inc. - Covering more than 20 health care specialties, SLACK publishes leading medical journals and newspapers, more than 250 medical and allied health books, and creates custom projects for a growing number of clients.

Van Duuren Media BV - Van Duuren Media is a Dutch publisher of non-fiction books and specializes in research funding, studies, photography and management. [http://www.vanduurenmedia.nl/eBooks/](http://www.vanduurenmedia.nl/eBooks/).

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**January 21, 2014**

**Bug Fixes**

- **Back Button** - In Summon 2.0, the back button will now allow the user to go back to the previous page.
- **Custom Link Field** - In Summon 2.0, custom javascript is printed verbatim. This will now be hidden.
- **Saved Items** - When deleting items from the Saved Items Folder the user will now be prompted.
- **Embed in an iFrame** - Summon 2.0 will now support being embedded within an iFrame.


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