Summon Roadmap + 360 and Intota Services Roadmap

February 2021



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What’s New For Summon





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Summon Roadmap

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Roadmap Areas and Highlights



SEARCH AND EXPLORING



OPEN SYSTEM



USER EXPERIENCE



LIBRARY EMPOWERMENT



CENTRAL DISCOVERY INDEX



ANALYTICS



ACCESSIBILITY



CONSORTIA

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Summon Roadmap Highlights

February Release

February 3rd

Update APA citation style to 7th Edition

Continued work on Sierra via Summon—Early Adopter Access

May Release

May 12th

Separate Print from Ebooks when Searching

NERS

Apply EZProxy to DOI in Preview Pane

NERS

Improvements on Topic Source Display

More convenience to access full text: Direct links to PDF (July Early Access)

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Summon Roadmap Highlights

August Release

August 4th

- Continued work on Sierra via Summon—Early Adopter Access
- Short URL for Citations (NERS)
- Better Tag Matching for "Best Bets" (NERS)
- Central Discovery Index – Subject heading normalization
- More convenience to access full text: Direct links to PDF (October General Availability)

December Release

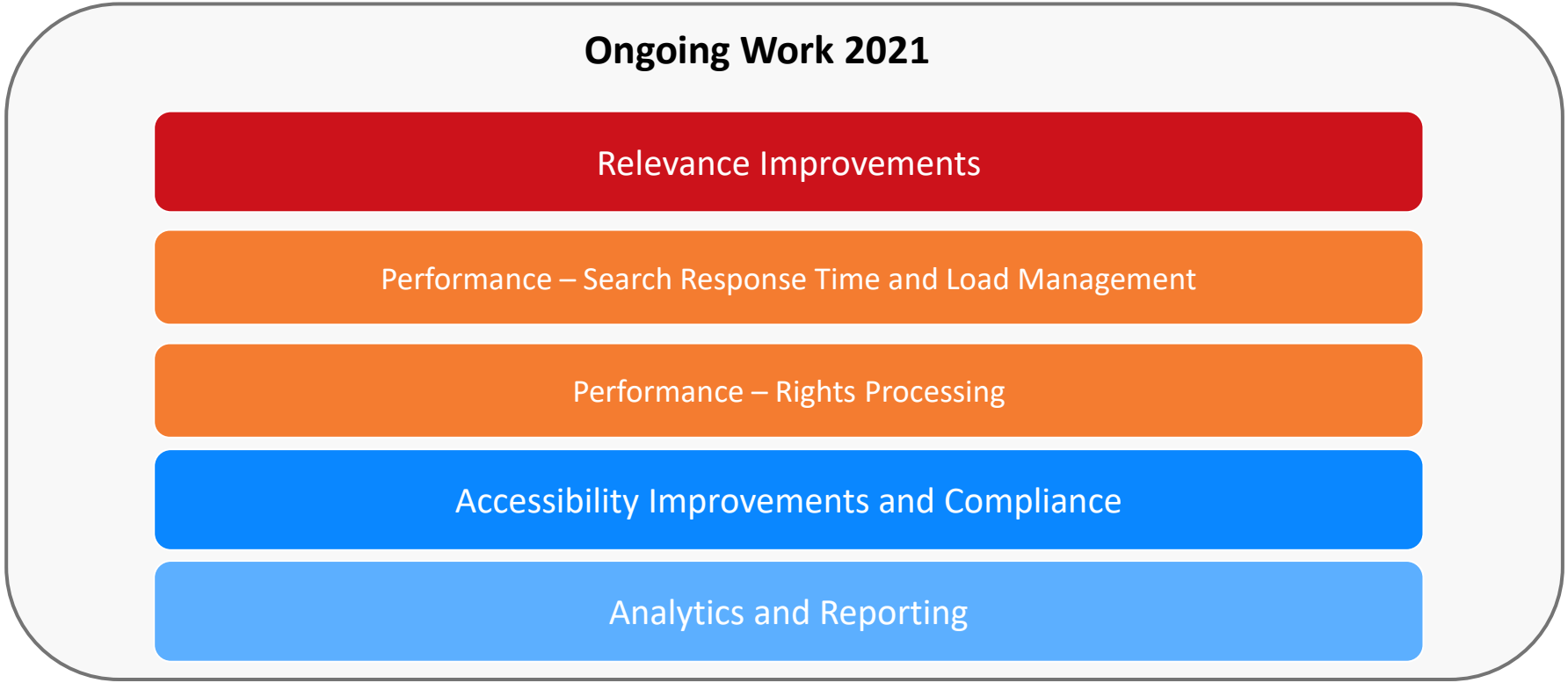
December 15th

- Summon User Interface Refresh
- Display All Links in Results (NERS)
- Improved Corrected Spelling (Did You Mean?) (NERS)
- Exact Search – Additional Fields (NERS)
- Improved Database Recommender Management Tools

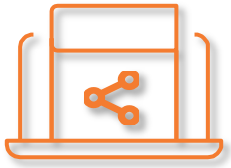
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Summon Roadmap Highlights



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Central Discovery Index (CDI)

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CDI – Highlights and Focus Areas

Central Discovery Index

Highlights:

- Improve normalization of Subject Headings
- Continued improvements for search responses from the API and for load balancing and management
- Improvements for rights updates in CDI



Improved efficiency and accuracy

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SEARCH AND EXPLORING

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Separate Print from Ebooks when Searching

SEARCH AND EXPLORING

NERS

What's Coming:

Two additional facets—One for print and one for ebooks



Highlights:

- Current facet combines print and ebooks; new facets will focus on each format alone
- Ability to include or exclude
- Configurable by institution

Provides the user with the best controls for refining their search results

Release planned: May 2021

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Better Tag Matching for “Best Bets”

SEARCH AND EXPLORING

NERS

What’s Coming:

Make Best Bets show up when tag keywords are present in search, not just when there’s an exact match



Highlights:

- Ability to match on tags when additional search terms are present
- Reduced need to create extensive tags to match potential user queries

Provides the user with guidance from the librarian right when they need it

Release planned: August 2021

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Exact Search—Additional Fields

SEARCH AND EXPLORING

NERS

What's Coming:

Add the functionality to do an exact search on certain fields



Highlights:

- Ability to select "exact match" on certain fields on the advanced search page
- Possible fields to include: Call Number, ISBN, ISSN, DOI, OCLC Number and Patent Number

Faster, more targeted discovery of known items for end users

Release planned: December 2021

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Relevance Improvements

SEARCH AND EXPLORING

What's Coming:

Adjustments and improvements as an ongoing process



Highlights:

- Iterative improvements for dynamic and static rank algorithms
- Based on feedback and system monitoring
- Implementation will be determined by success of relevance tests

Provides the user with the best results for their search

Release planned: Throughout 2021

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USER EXPERIENCE

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Improvements on Topic Source Display

USER EXPERIENCE

What's Coming:

Improvement for which source name is used for topic display



Highlights:

- Alignment of source displayed for encyclopedia entry in Summon search results with the linked source

Provide better user experience

Release planned: May 2021

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Direct links to PDF

USER EXPERIENCE

What's Coming:

More convenience to access full text



Highlights:

- Ability to prefer display of direct links to PDFs
- Configurable by institution

Provide better user experience and access to content

Release planned: Early access in July; general access in October

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Short URLs for Citations

USER EXPERIENCE

NERS

What's Coming:

Short URL to replace long, encrypted URL currently used in citations



Highlights:

- Creation of a short URL management system for Summon
- Improvement for all citation styles

Provide better user experience and citation management

Release planned: August 2021

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Improved Corrected Spelling (Did You Mean?)

USER EXPERIENCE

NERS

What's Coming:

Modification of Did You Mean? functionality to meet user expectations

Highlights:

- Automatic replacement of misspelled word with corrected spelling
- Ability to search on original terms as a secondary search

Release planned: December 2021



Meet user expectations for their search experience, returning expected results more quickly

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Summon User Interface Refresh

USER EXPERIENCE

What's Coming:

Improvements to overall usability to existing Summon functionality



Highlights:

- Improve placement and usability of features on the results page
- Focus on improving facets, results short display and preview, and accessibility
- Will not be a new UI but may require updates to training materials

Release planned: December 2021 with extended preview

Ensure best user experience and easy access to all elements on the Search Results page

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LIBRARY EMPOWERMENT

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Improved Database Recommender Management Tools

LIBRARY EMPOWERMENT

What's Coming:

Improve DB Recommender activation process, ranking and curation of sources



Highlights:

- Batch processing for DB Recommender changes
- Librarian can assign priority to listed databases

Better ability to manage and expose what is most relevant

Release planned: December 2021

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Display All Links in Results

LIBRARY EMPOWERMENT

NERS

What's Coming:

Enhance in Summon results page to display all full text links subscribed in the knowledgebase



Highlights:

- Provide multiple sources for the end user to choose
- Configurable by institution

Maximize the use of the library's resources and ensure users successful access to content

Release planned: December 2021

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Update APA citation style to 7th Edition

LIBRARY EMPOWERMENT

What's Coming:

Support for APA citation style (7th Edition)



Highlights:

- Ability for users to save or export items in APA 7th Edition Format
- Accessible via the Saved Items folder or using the citation icon in the brief results

Better alignment with current citation formats

Release planned: February 2021

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ACCESSIBILITY

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Accessibility For Everyone

ACCESSIBILITY

What's Coming:

Ongoing web content accessibility compliance



Highlights:

- Ongoing accessible-first feature developments
- Support Web Content Accessibility Guidelines (WCAG) 2.1

Ensure access for everyone

Release planned: Throughout 2021

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OPEN SYSTEM

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Apply EZProxy to DOI in Preview Pane

OPEN SYSTEM

NERS

What's Coming:

The ability to add EZproxy to DOI field link

Highlights:

- Ability at add EZproxy to DOI URL
- Configurable by institution

Release planned: May 2021

Impact

Making content more easily accessible

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Sierra via Summon

OPEN SYSTEM

What's Coming:

Better integration of library systems and Summon



Highlights:

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

Stronger, unified discovery and management

Release planned: Early Adopter Access H1; General availability H2

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360 and Intota Services 2021 Roadmap

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2021 Overview

2021 H1

- Rollout of COUNTER r5 reports
- General availability of the new 360 API for Library Holdings
- Video titles in the 360 MARC Updates service
- Overlap Analysis results separated by format
- “View Changes” export option

2021 H2

- Filter out “Not Tracked” titles from the EJP autocomplete suggestions
- Add Videos only search option to the EJP
- 360 Link ILL form enhancement
- Option to display most recent coverage option in the EJP
- Ability to upload Database Details report

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COUNTER r5 Reports Rollout

What's New	Highlights	Impact
Intota Assessment reports reflecting the new standard's measurements and metrics	Ebook, ejournal, and database reports with calculated Cost Per Use R5 metrics available for custom reports	Libraries can take advantage of their e-resource holdings metadata for special projects or downstream applications

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General Availability of the New 360 API for Library Holdings

What's New

Open API for 360 and Intota libraries to query the details of their library profile holdings

Highlights

Collect information regarding

- Providers
- Databases
- Titles

Impact

Libraries can take advantage of their e-resource holdings metadata for special projects or downstream applications

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Video Titles in the 360 MARC Updates Service*

What's New	Highlights	Impact
Bibliographic records for video titles will be generated, in addition to the current journal and book titles	Records adhere to metadata description best practices for videos, and are added/updated deleted per existing service processing rules	Enables easier discovery of video titles, a format whose usage is surging

*Subscription details will be forthcoming.

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Overlap Analysis Results Separated by Format

What's New	Highlights	Impact
Option to separate the results of Overlap Analysis by format rather than intermixing all titles	Elect to run Overlap Analysis against just one format type, or include all format types and then filter results by format type	Easier view into collection holdings by grouping like formats together

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“View Changes” Export Option

What’s New	Highlights	Impact
Ability to export the details of the View Changes audit log	Fulfills a long-standing enhancement to output audit log details in a spreadsheet-friendly format	Allow users to filter, search, and gather basic statistics for the View Changes entries

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Questions?

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Thank you!

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