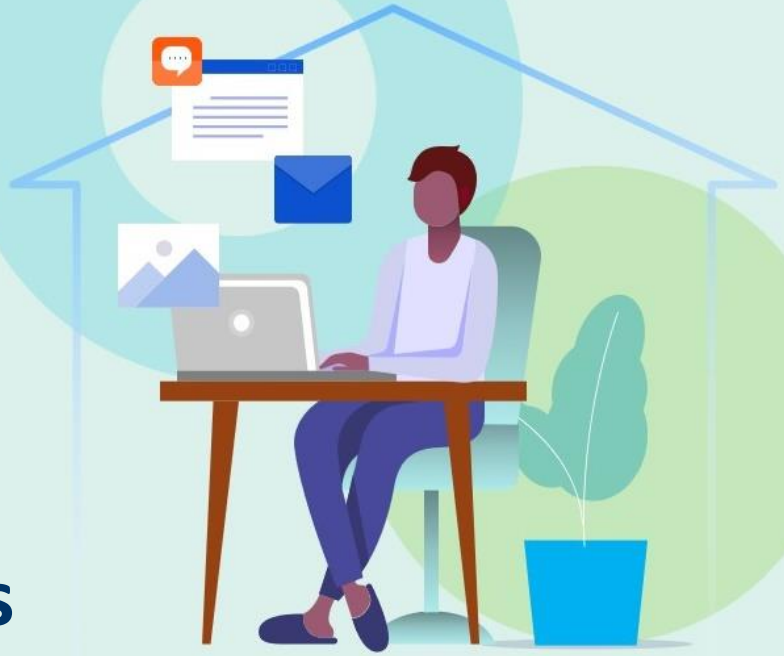


The Summon & 360 and Intota Services Roadmaps

February 2022

Brent D. Cook | Director, Product Management, Summon
Amy Pemble | Director, Product Management

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Brent D. Cook
Director, Product Management
Summon



Amy Pemble
Director, Product Management
Intota & 360 Services

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- Summon Roadmap
- 360 and Intota Services Roadmap
- Upcoming Webinars and Community Involvement
- Support Portal and Chat
- Questions?



Summon 2022 Roadmap

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Planned Release Dates and Preview Environment

- Quarterly Releases—include release notes and preview period
  - February 2 Preview January 26
  - May 11 Preview April 27
  - August 3 Preview July 20
  - November 2 Preview October 19

- Maintenance Releases
  - First Wednesday of all other months
  - No preview
  - No release notes (unless it includes customer- or patron-facing functionality)

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Summon Roadmap Highlights

2022 H1	2022 H2
• Summon UI Refresh: Improvements on the December 2021 Release • Ability to exclude subject headings, by institution • SAML support for Sierra via Summon (SvS) • My Library Card improvements (SvS) • Custom Citation Styles • TBD by NERS votes ongoing prioritization	• Summon UI Refresh: QuickView/Preview Pane • Summon UI Refresh: Results Page Refinements • Summon UI Refresh: Advanced Search • TBD by NERS votes ongoing
• Data Quality Improvements • Ongoing Analytics • Accessibility	

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User Experience (UI and functions)

User Experience	Summon UI Refresh: Results Page Refinements
	Summon UI Refresh: Quick View / Preview Pane
	Summon UI Refresh: Advanced Search
	Custom Citation Styles

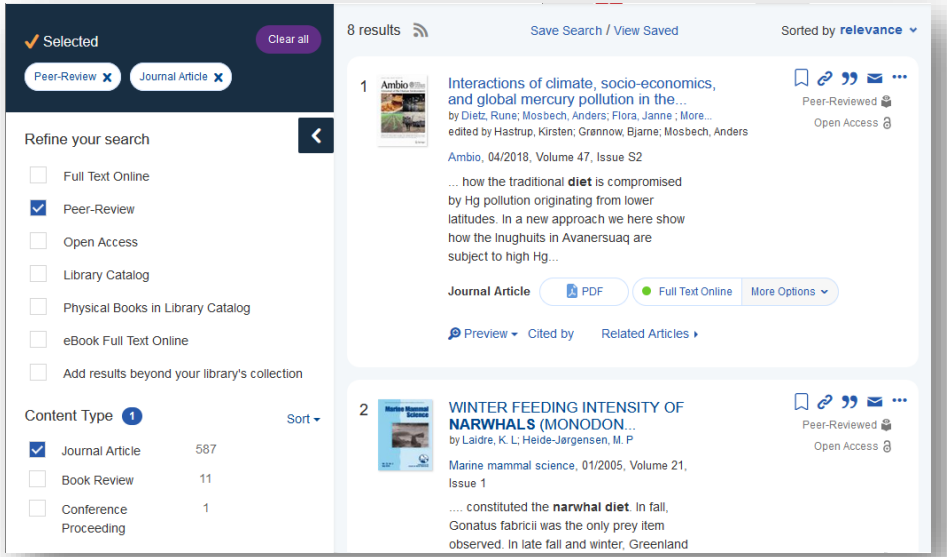
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Summon UI Refresh: Results Page Refinements

Translation Improvements: Ability for Institutions to Customize Labels and Text in the Summon UI

- Added values for new labels missing from the Translations tab in the Admin Console
- Facet value translations should be displayed in the facet pane
- Changed “x” for multiple copies (as in “5x” available) to “copies” and added this to the Translation tab
- For Summon over Alma clients, changed default text for “Alma Provider” to “Library Catalog”; “Library Catalog” can be customized under Translations



2022 H1

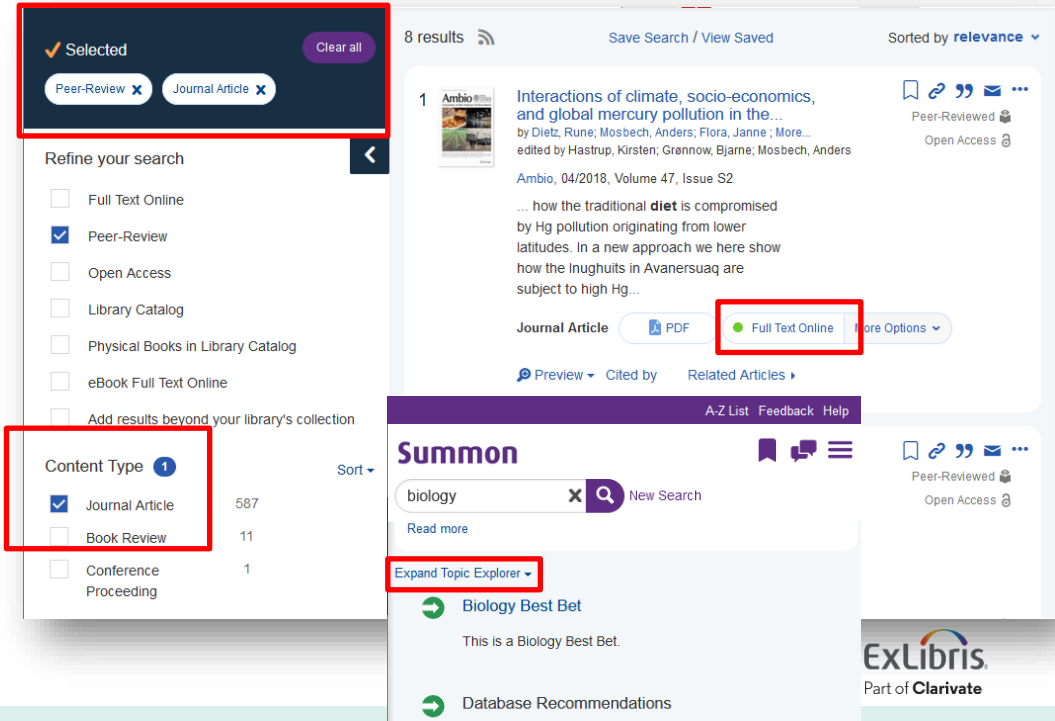
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Summon UI Refresh: Results Page Refinements

Customization improvements and refinement

- Added the ability to customize colors for new elements in Facet pane
- On/Off toggle added in Admin Console for More Links option
- Addressed issues with inconsistent display of Availability green dot
- Removed toggle for Topic Explorer for sites when Topic Explorer is disabled



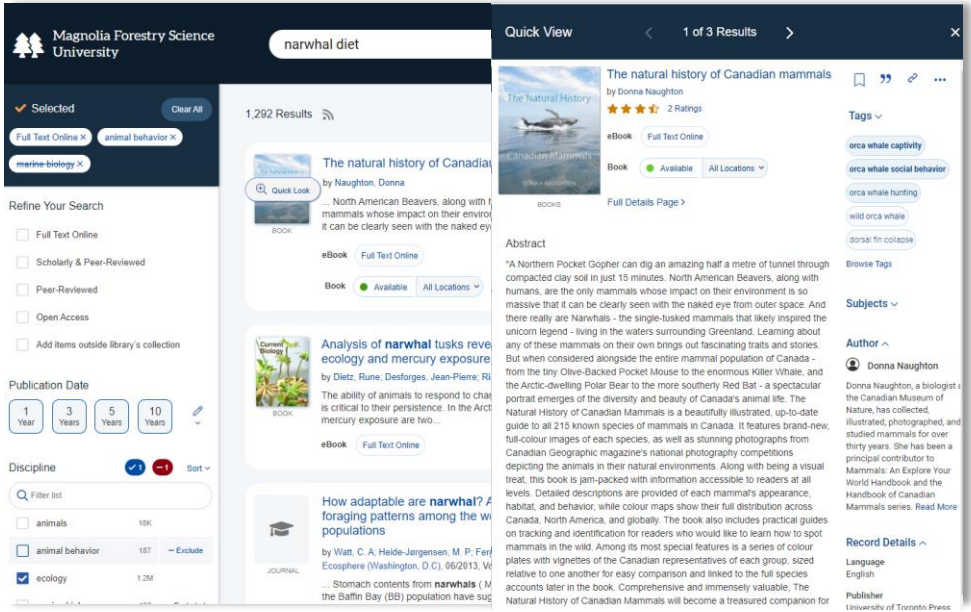
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Summon UI Refresh: Quick View / Preview Pane

Provide more detailed information on a brief result via a Quick View overlay pane

- Provide more information on a specific result without leaving the Search Results Page
- Improved visual and placement based on user feedback and expectations from other sites



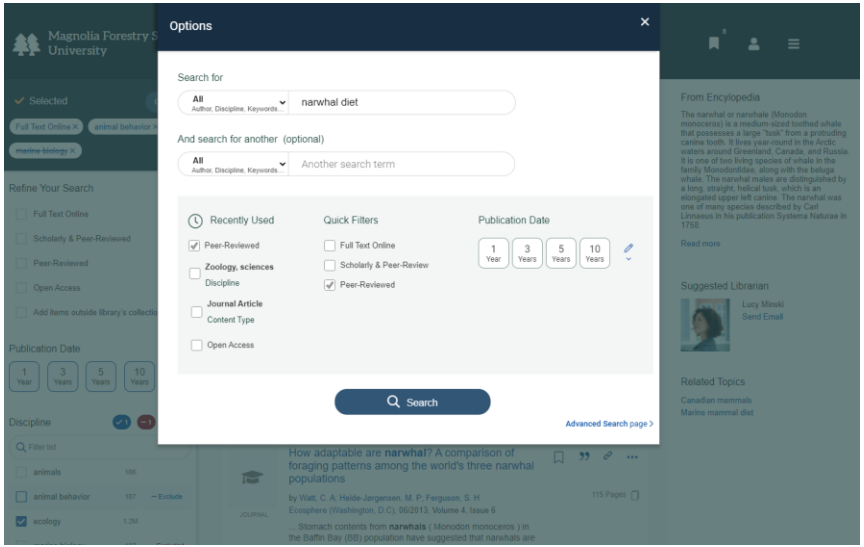
2022 H2

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Summon UI Refresh: Advanced Search

Improve access to Advanced Search features via simplified overlay and refresh Advanced Search Page for useability

- Create a new Advanced Search overlay so frequently used tools are easily accessible
- Refine Advanced Search page for better usability



2022 H2

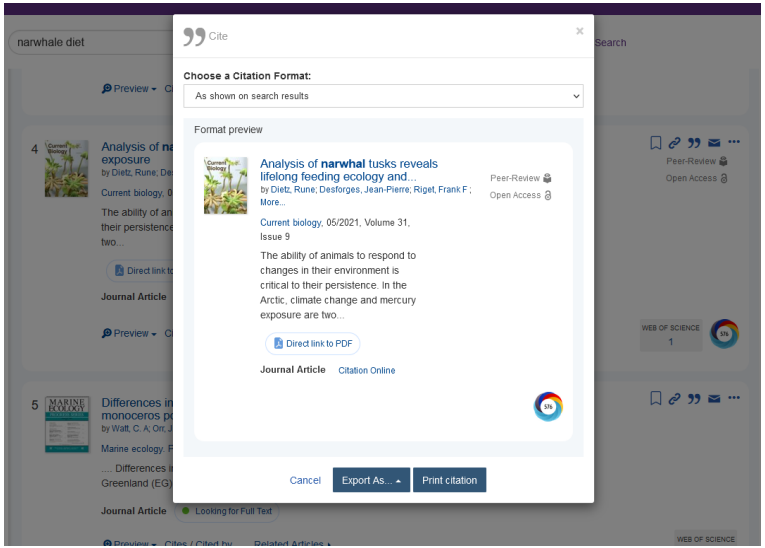
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Custom Citation Styles

Ability to create custom citation styles

- Create new citation styles that currently are not available in Summon
- Create styles based on existing ones that match your institution's needs



2022 H1

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Open Systems and Integration

Open Systems and Integration	Sierra via Summon: SAML Support
	Sierra via Summon: My Library Card Improvements

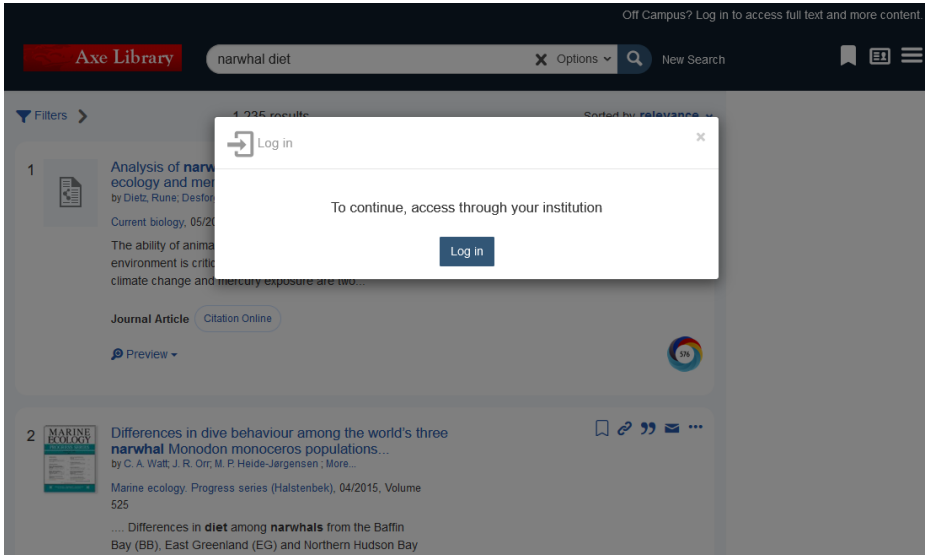
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Sierra via Summon: SAML Support

Ability to log into Sierra via Summon using SAML authentication

- Add SAML integration to the current Sierra via Summon integration
- Will support both CAS and SAML
- First step in additional improvements for authentication



2022 H1

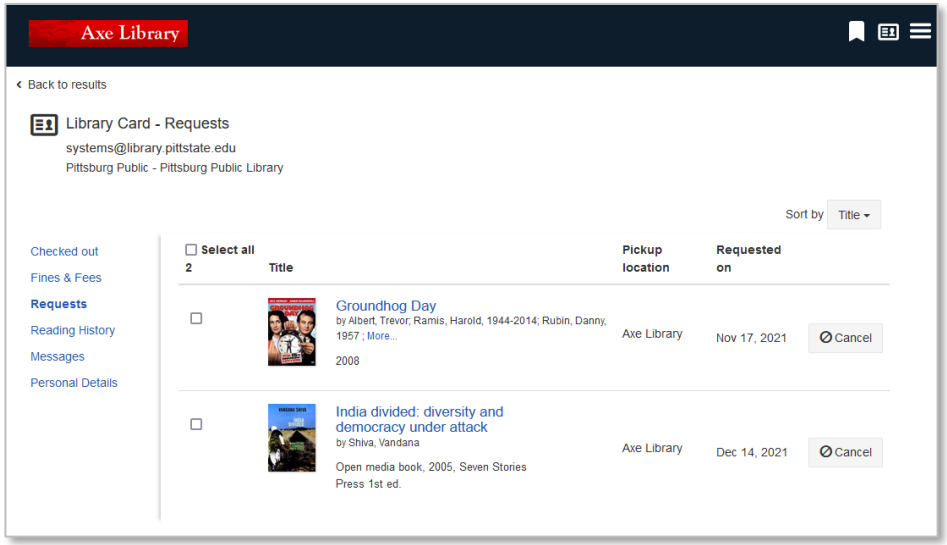
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Sierra via Summon: My Library Card Improvements

Provide patrons access to a My Library Card page customized for your institution

- Ability to configure elements displayed in My Library Card page
- Additional functionality



2022 H1

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Search and Ranking

Search and Ranking	Ability to Block Display of Specific Subject Headings by Institution
	CDI - Ability to Set the Default Search to Include or Exclude Full Text Matches

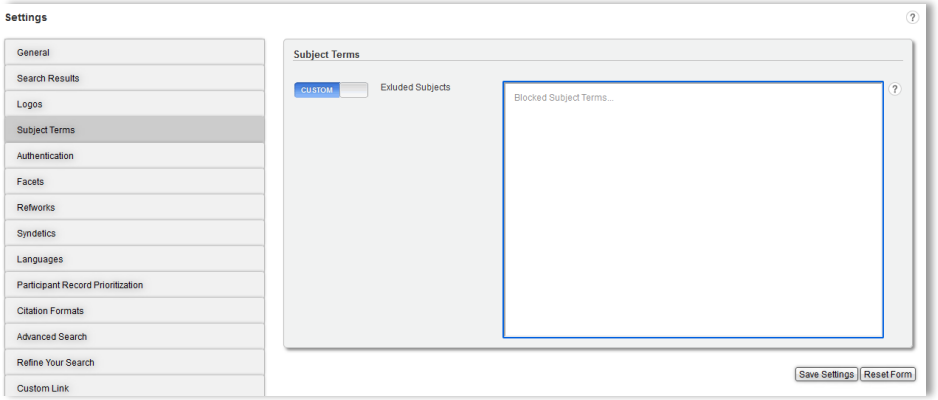
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Ability to Block Display of Subject Headings by Institution

Manage subject terms that appear in the Facet Pane on the Summon Results Page

- Provide ability to block offensive terms in Subject Term facet
- Institutions can manage their specific block list for subject terms based on their specific needs
- Text is still indexed and used for relevance



2022 H1

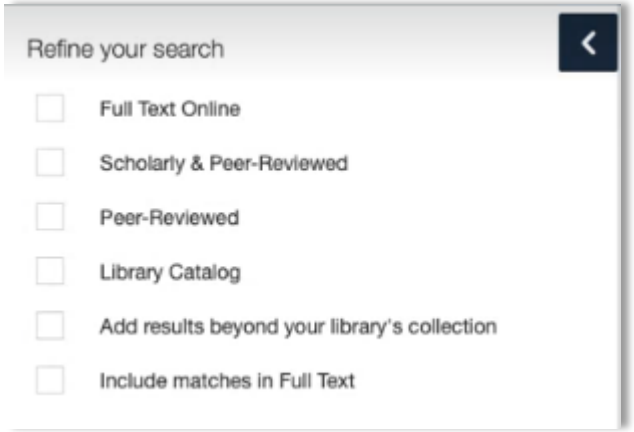
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CDI – Ability to Configure Include or Exclude Full Text Matches

Users can choose if their searches should include or exclude records based on full text matches

- Users have the option to expand to Include Matches in Full Text in the Refine your search section
- Configurable by institution
- Reduces long tail of results in initial search
- Speeds up site response time



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Linking to Full Text

Linking to Full Text	Include OpenURL with Show All Links Options 

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Include OpenURL with Show All Links Options

Ability to display all possible links for electronic content

- Sites can now include Open URL links under More Options for linking in brief result
- “Link Resolver” text is customizable by institution



NERS

2022 H1

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Data Quality and Rights

Data Quality and Rights	CDI Rights Processing Improvements - Enhanced Performance and Improved Matching
	Ongoing Improvements in the Merged Record

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Ongoing Improvements

Other	Accessibility
	Analytics

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New Enhancement Requests from ELUNA / IGELU

NERS Features



Inclusion to be determined by NERS prioritization process; final list will be included in the Summon Roadmap on the Knowledge Center

- Display Coverage Dates for E-journals in Summon Results
- Refine Content Type Web Resource to Identify Online Newspaper Articles
- Improve Open Access Indicator to Ensure OA link Is Available
- Collection Discovery for Summon over Alma
- Better Display of Serial Publications in Search Results

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360 and Intota Services Roadmap

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Planned Release Dates

- Quarterly Releases
  - February 23
  - May 11
  - August 3
  - November 2

- Monthly server maintenance window
  - 3rd Sunday of each month. Sign up at Ex Libris Status page for alerts

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Searching and Linking

Searching and Linking	EJP: Filter the Autocomplete Suggestions
	360 Link: New Refinements to IEDL
	NERS TBD

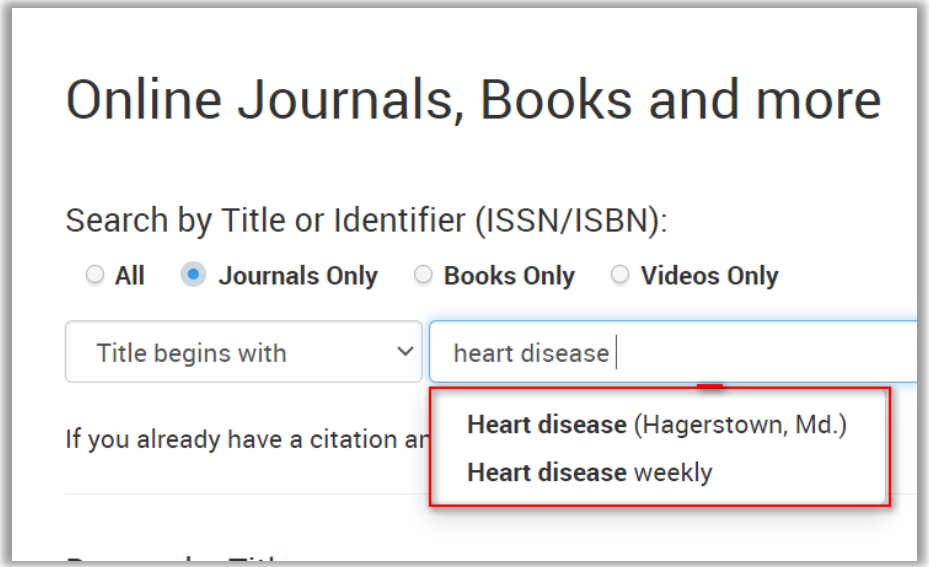
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EJP: Filter the Autocomplete Suggestions

Make searches more successful by filtering autocomplete suggestions to subscribed resources

- Automatically filter search suggestions to resources the library licenses / owns
- Eliminate 0 result searches and user confusion



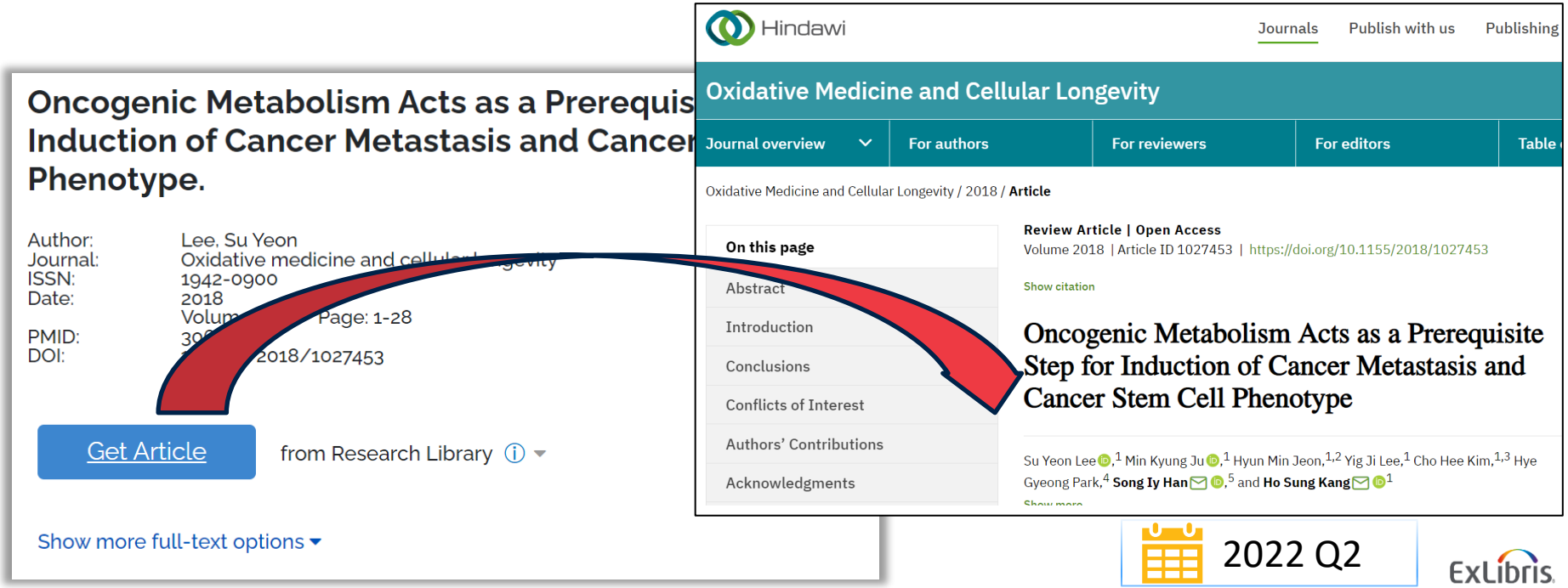
2022 Q1

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360 Link: New Refinements to IEDL

Enhance linking accuracy with continued refinements to Index Enhanced Direct Links (IEDL)



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Workflow Refinements

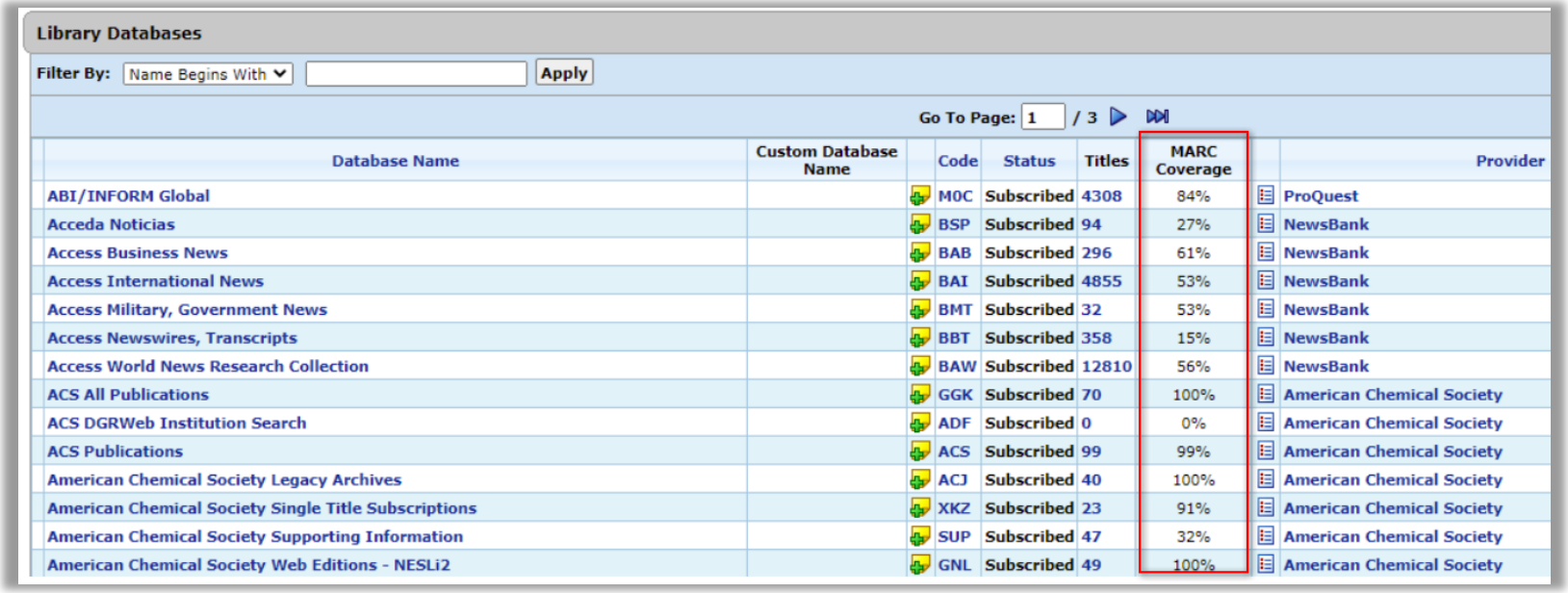
Workflow	Display MARC Record Availability NERS
	Integrate NISO Recommended Practices for KBART Automation
	360 Link: Upload Database Order

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Display MARC Record Availability

View the MARC record availability (i.e. normalization percentage) at the database level



Library Databases

Filter By: Name Begins With [ ] Apply

Go To Page: 1 / 3

Database Name	Custom Database Name	Code	Status	Titles	MARC Coverage	Provider
ABI/INFORM Global		M0C	Subscribed	4308	84%	ProQuest
Acceda Noticias		BSP	Subscribed	94	27%	NewsBank
Access Business News		BAB	Subscribed	296	61%	NewsBank
Access International News		BAI	Subscribed	4855	53%	NewsBank
Access Military, Government News		BMT	Subscribed	32	53%	NewsBank
Access Newswires, Transcripts		BBT	Subscribed	358	15%	NewsBank
Access World News Research Collection		BAW	Subscribed	12810	56%	NewsBank
ACS All Publications		GGK	Subscribed	70	100%	American Chemical Society
ACS DGRWeb Institution Search		ADF	Subscribed	0	0%	American Chemical Society
ACS Publications		ACS	Subscribed	99	99%	American Chemical Society
American Chemical Society Legacy Archives		ACJ	Subscribed	40	100%	American Chemical Society
American Chemical Society Single Title Subscriptions		XKZ	Subscribed	23	91%	American Chemical Society
American Chemical Society Supporting Information		SUP	Subscribed	47	32%	American Chemical Society
American Chemical Society Web Editions - NESLi2		GNL	Subscribed	49	100%	American Chemical Society

NERS

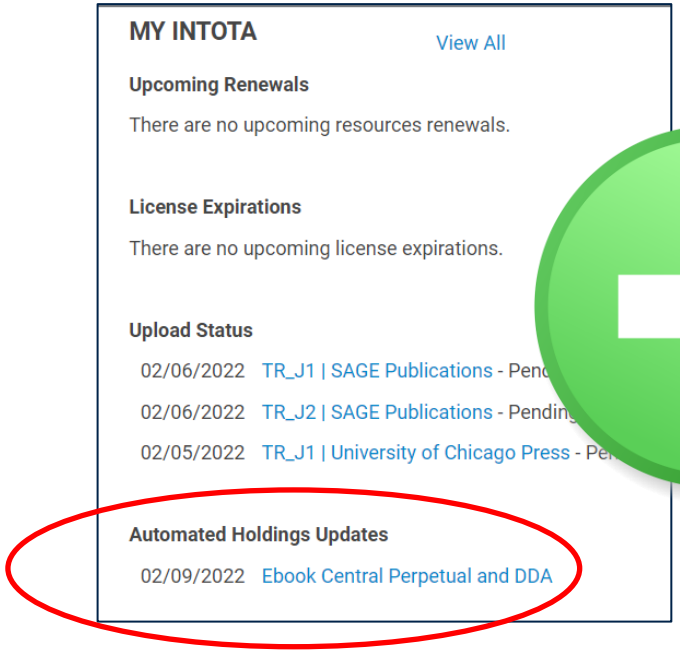
2022 Q2

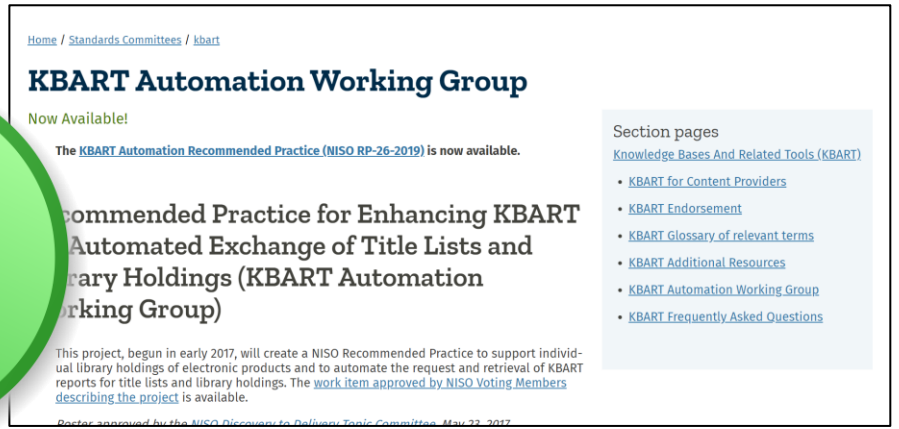
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Integrate NISO Recommended Practices for KBART Automation

Expand auto-holdings support beyond Ebook Central





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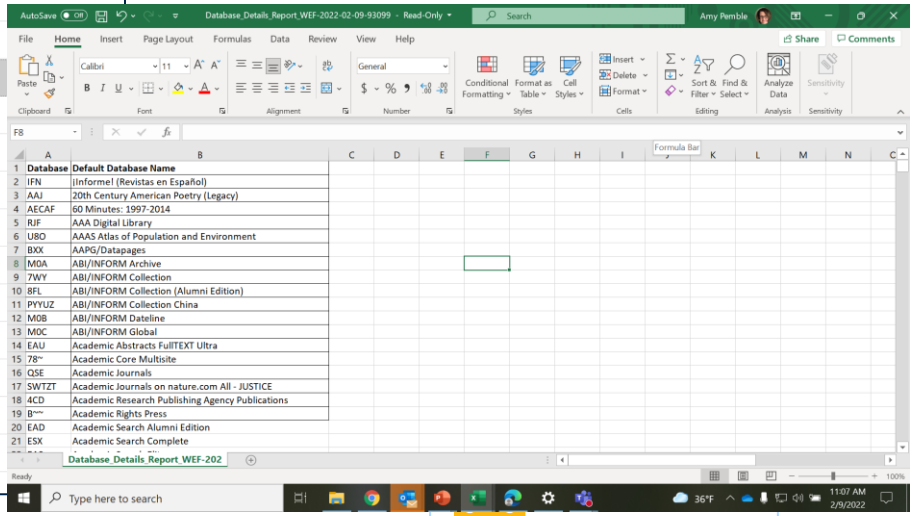
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360 Link: Upload Database Order

Bypass Admin Console drag-n-drop UI

209	Backfile Package - Psychology (Legacy) [YPT]
210	Sharpe Online Reference
211	Slavery, Abolition and Social Justice, 1490-2007
213	SPIE journals
214	Springer Books
215	Springer Online Journals Complete
216	SpringerLINK - SCELC Combo
217	SpringerLink Contemporary (1997 - Present)
218	Taylor & Francis Online
219	Thieme Clinical Collections
220	Thieme E-Library
221	Thieme-Connect
222	Thèses.fr
223	UC Press E-Books Collection, 1982-2004 (Public)
224	University of California Press Journals
225	UPCC Books 2013 Complete Collection
218	Wiley-Blackwell Online Books - All Titles (includes Withdrawn titles)

Springer Online Journals Complete



Database	Default Database Name
IFN	¡Informe! (Revistas en Español)
AAJ	20th Century American Poetry (Legacy)
AECAF	60 Minutes: 1997-2014
RJF	AAA Digital Library
U8O	AAAS Atlas of Population and Environment
BXX	AAPG/Datapages
M0A	ABI/INFORM Archive
7WY	ABI/INFORM Collection
8FL	ABI/INFORM Collection (Alumni Edition)
PYYUZ	ABI/INFORM Collection China
M0B	ABI/INFORM Dateline
M0C	ABI/INFORM Global
EAU	Academic Abstracts FullTEXT Ultra
78~	Academic Core Multisite
QSE	Academic Journals
SWTZT	Academic Journals on nature.com All - JUSTICE
4CD	Academic Research Publishing Agency Publications
B~~	Academic Rights Press
EAD	Academic Search Alumni Edition
ESX	Academic Search Complete

2022 H2

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Infrastructure Investment

Infrastructure	Migrate Intota Assessment to Oracle Analytics Server (OAS) platform
	Migrate 360 & Intota suite to new database software

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Upcoming Webinars and Community Engagement

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Upcoming Webinars and Activities

- **What's New with Summon – April 25 & April 26**
  - AMERICAS/APAC: April 25 at 4:00 pm (San Francisco); April 26 at 9:00 am (Tokyo); 11:00 am (Sydney)
  - AMERICAS/EMEA: April 26 at 9:00 am (Chicago); 4:00 pm (London)
  - AMERICAS: April 26 at 10:00 am (San Francisco); 1:00 pm (New York)
- **Additional events**
  - ELUNA: online sessions being scheduled for May
  - IGeLU: hybrid event scheduled in September
  - Ex Libris Customer Success webinar series: being scheduled
  - Summon PWG Customer sessions: being planned

IGeLU
International Group of Ex Libris Users

ELUNA
Ex Libris Users of North America

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Your Direct Impact through NERS and the Idea Exchange

Roadmap Items from the New Enhancement Request System in 2021

- Make "Best Bets" show up when tag keywords are present in search, not just when there's an exact match
- Displaying all links available in Summon results page
- Ability to remove the long URL when exporting from Summon to RefWorks
- Link to all full-text options from within Summon results, alongside 1-click
- Automatically searching for the corrected spelling
- "Exact" search for certain fields
- Put ORCID on advanced search
- Provide full text link PDF in the first result page itself

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Idea Exchange suggestions completed in 2021

- DB recommender - tags export feature
- Ability to prioritize databases in the Database Recommender
- Make View Changes in Client Center Exportable
- Included visual indicator for publication date filter presets
- Make all availability visible
- Ability to exclude a facet value in the main facet pane, rather than in the More facet pane
- Make apply button for More facet pane stick to top of mobile screen

https://ideas.exlibrisgroup.com/

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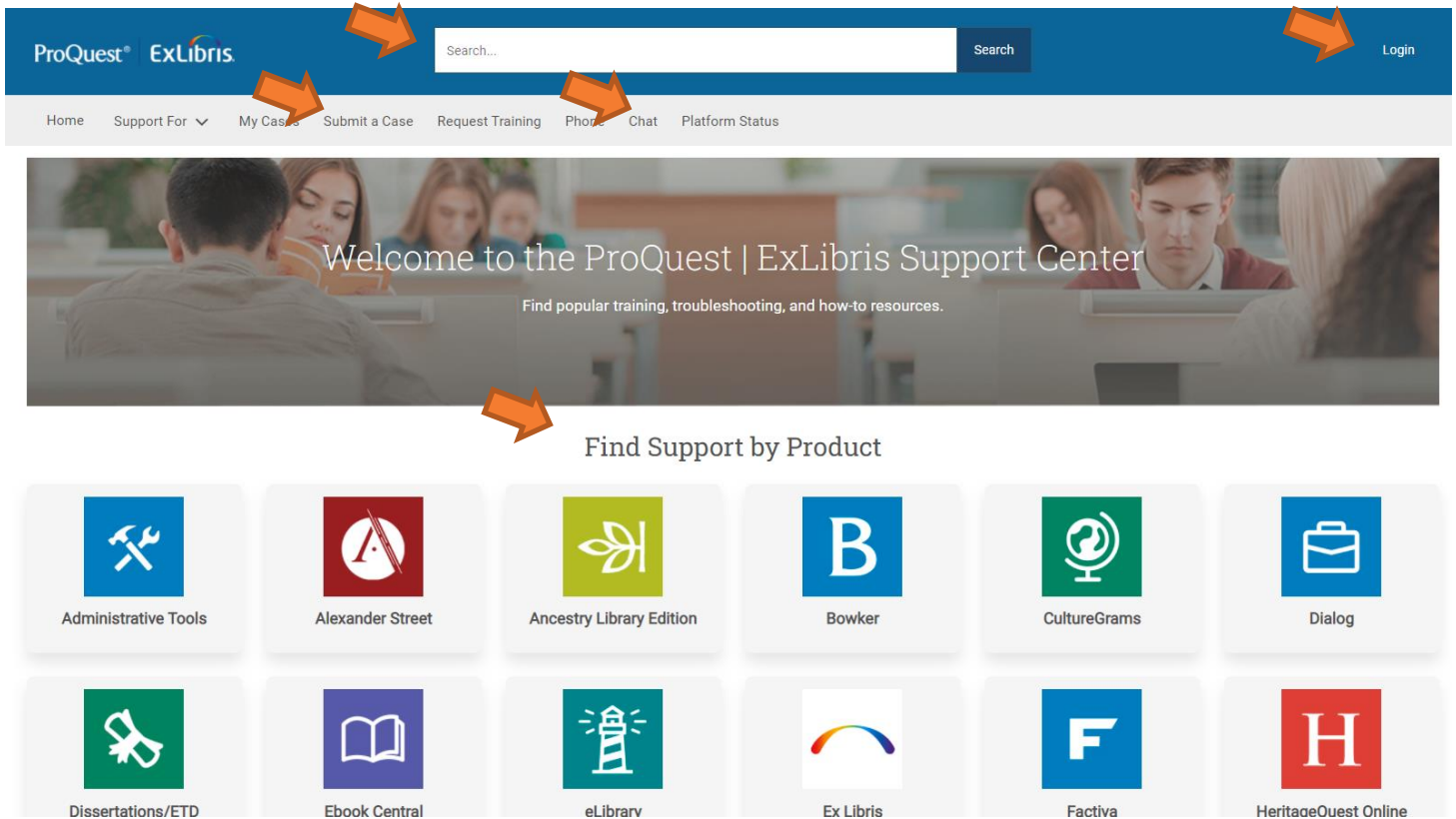


New Support Center Available

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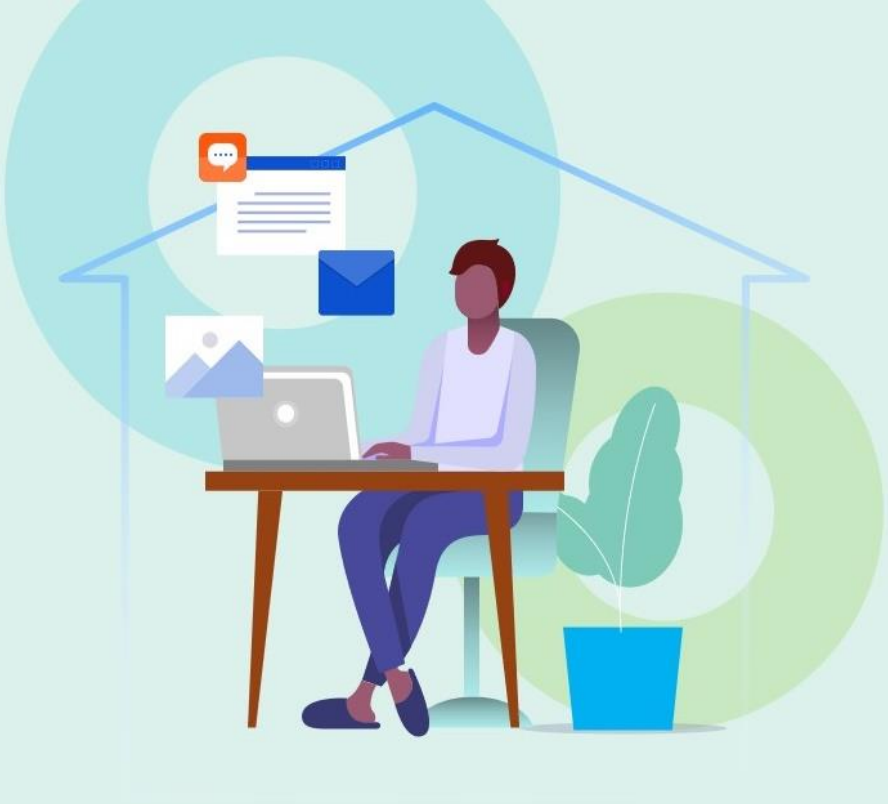
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