

The Summon & 360 and Intota Services Roadmaps

February 2022

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- Review Summon 2023 Roadmap
- Highlights for CDI Development in 2023
- 360 and Intota Services Roadmap
- Upcoming Webinars and Community Involvement
- Questions?



Summon 2023 Roadmap

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Planned Release Dates and Preview Environment

- Quarterly Releases—include release notes and preview period
  - February 1 Preview January 18
  - May 3 Preview April 19
  - August 2 Preview July 19
  - November 1 Preview October 18

- 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

2023 H1	2023 H2
• Advanced Search: Improve Search Box Layout • Advanced Search: Updated Look and Feel Controls • SAML for Saved Searches • LTI Support for Summon • Google Analytics 4 Support • Mandatory sender e-mail field in Summon (NERS)	• Scopes for Summon Searches • Course Reserves for Sierra via Summon • Improve the Quick Look Pane Layout (NERS) • Display 5xx Fields in Quick Look (NERS) • “Include matches in Full Text” to Search Suggestions (NERS) • Ability to Customize Order of Elements in the Right Pane (NERS) • Ability to match language settings of Summon with 360 Link (NERS) • Prevent eBook and Computer File records from Merging (NERS)

- Data Quality Improvements
- Ongoing Analytics
- Accessibility

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February Release

Production Environment: February 1

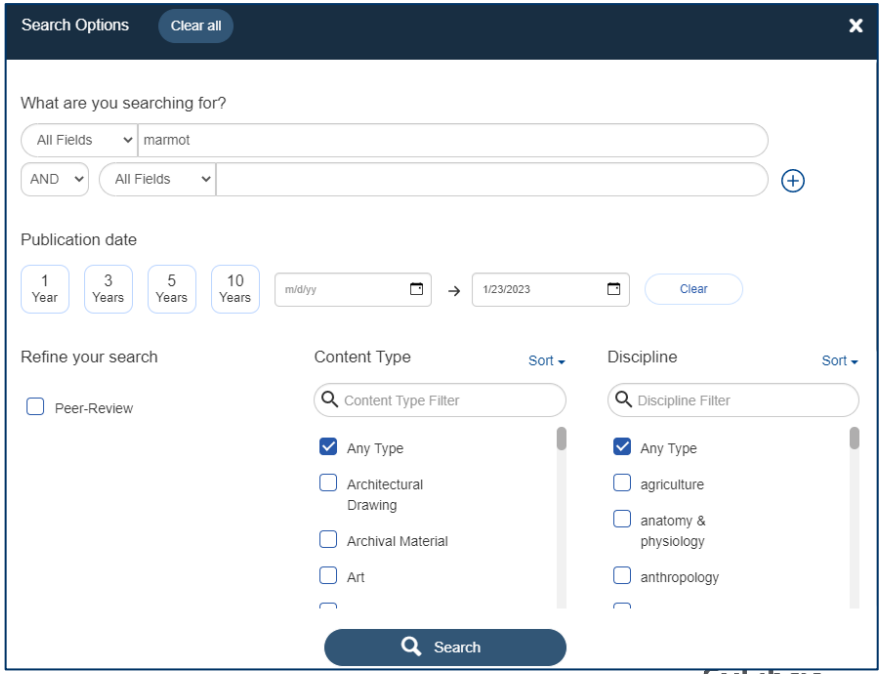
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Advanced Search: Improve Search Box Layout

Improve search box placement based on feedback

- All search boxes on the Advanced Search stack in one column
- Matches user expectation and layout of most major databases



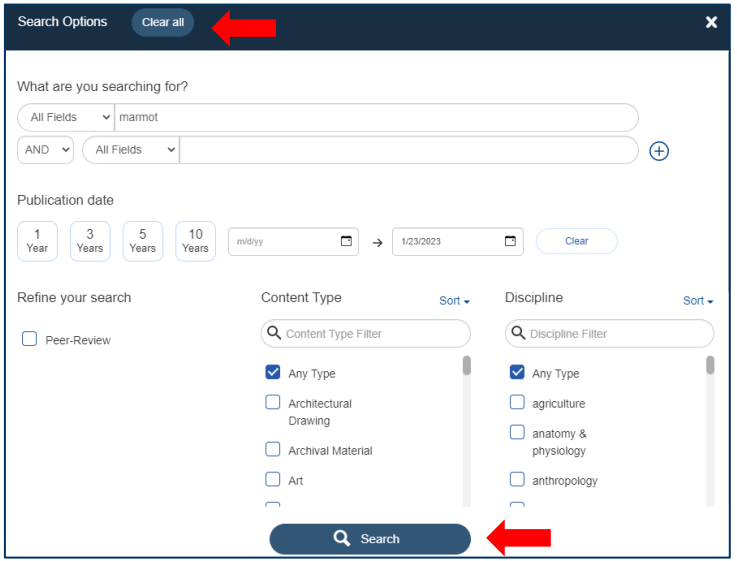
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Advanced Search: Updated Look and Feel Controls

Added missing controls for font and button colors on the Advanced Search form

- Colors for the font and button for “Clear All” and “Search” are now customizable



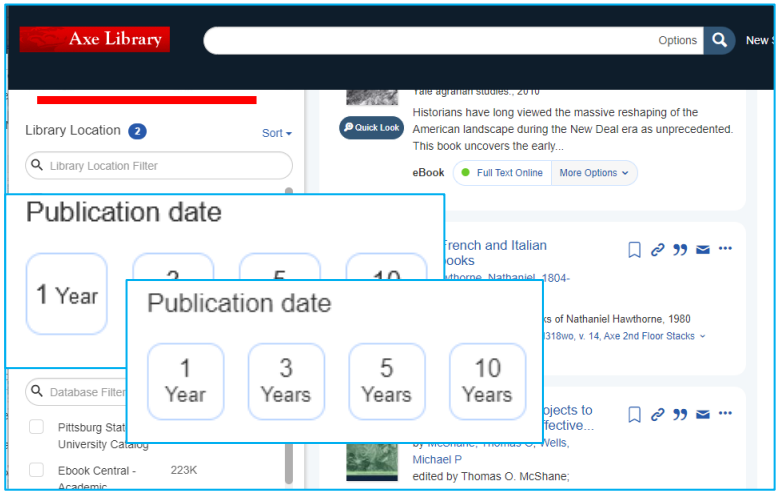
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Summon UI Refresh: Additional Fixes

Improve Advanced Search Page based on your feedback

- Addressed issue with translation issue with "Search Options" on advanced search
- Fixed label formatting for “1 Year” button in Firefox
- Library location facet values selected on Advanced Search are now displayed on the Search Results page



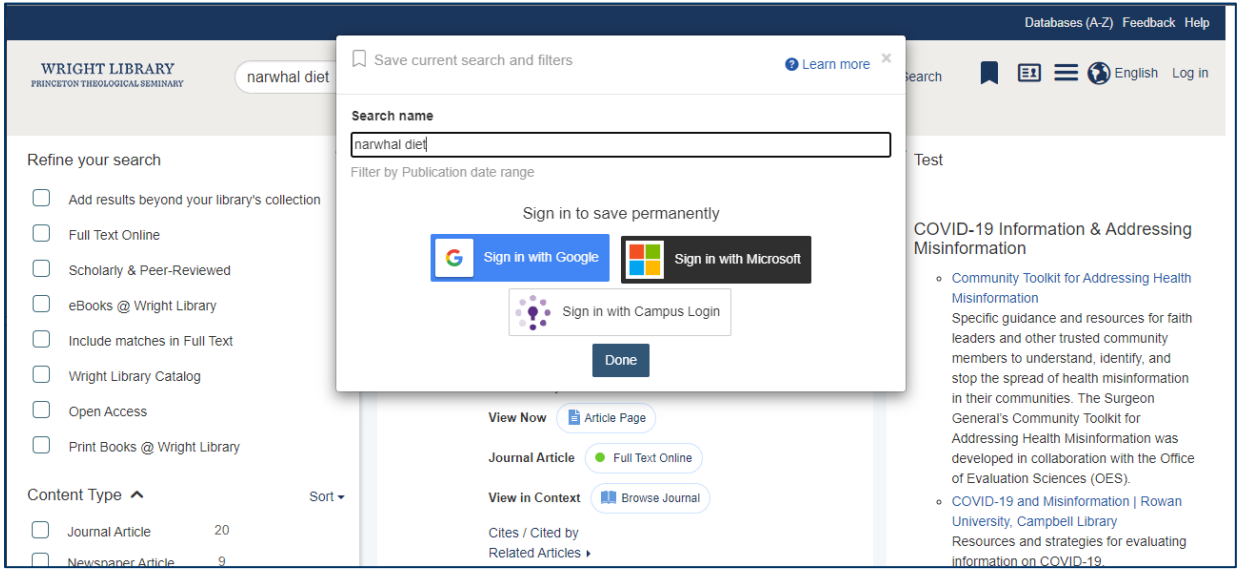
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Sierra via Summon: SAML for Saved Searches

Ability to log into Saved Searches using SAML authentication

- Adds SAML integration to Saved Searches for Sierra via Summon institutions
- Allows for storage of Saved Searches on Summon Servers
- GDPR Compliant
- In addition to MS OneDrive and Google Drive logins



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May Release

Preview Environment: April 19

Production Environment: May 3

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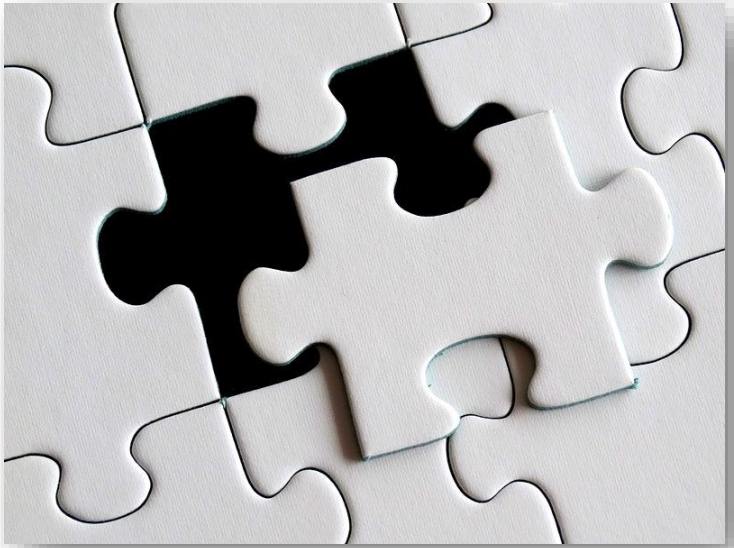
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LTI Support for Summon

Implementation of an LTI for Summon

- Ability to integrate Summon into Learning Management Systems (LMS) such as Canvas
- Develop LTI (Learning Tools Interoperability) Support

* The majority of the development work (phase 1) will be completed in May; implementation of the newly developed service will require a second phase outside of development releases



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Google Analytics

Support for Google Analytics 4

- Improve reporting by updating Google Analytics to support current version
- Planned for the May release



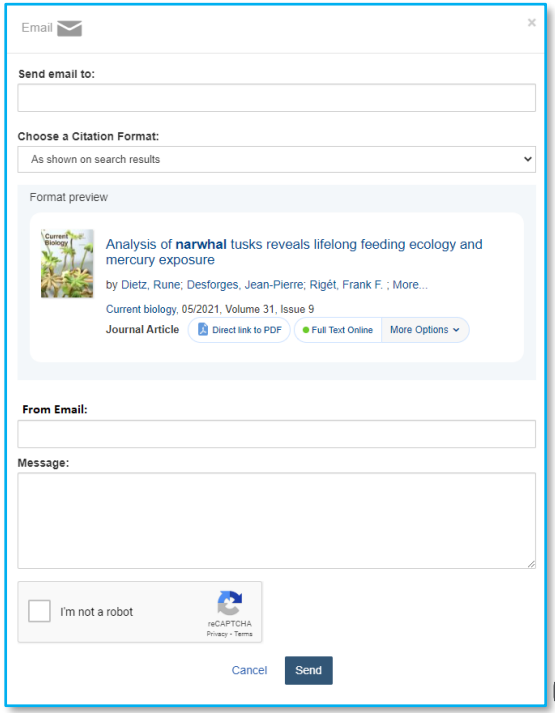
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Mandatory Sender Email Field in Summon

Provide the option for a sender's email for citations

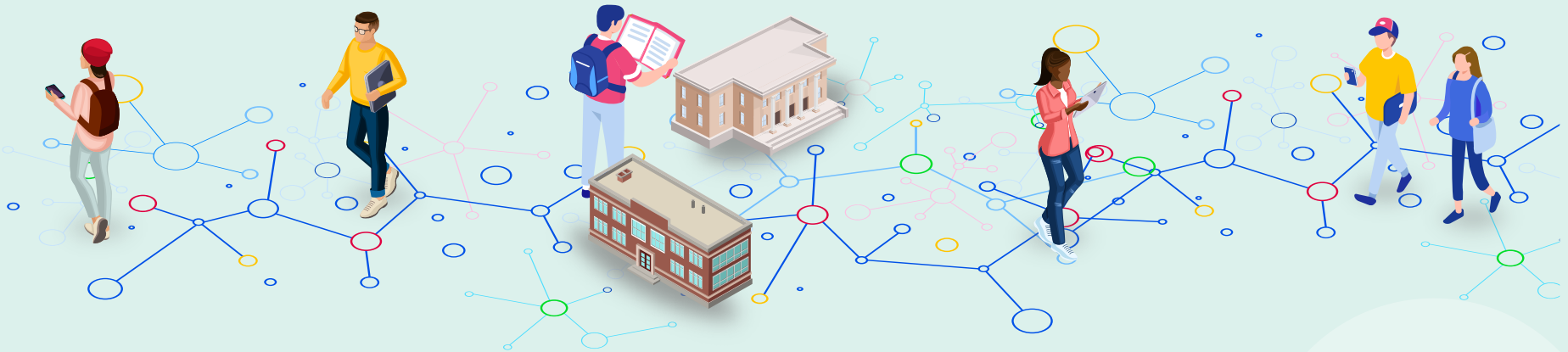
- Allows institutions to add a field requesting the user's email address
- Address will be included in the body of the email to assist with follow up for staff, when needed
- Configurable as a required field by institution



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Summon Releases for Second Half of 2023

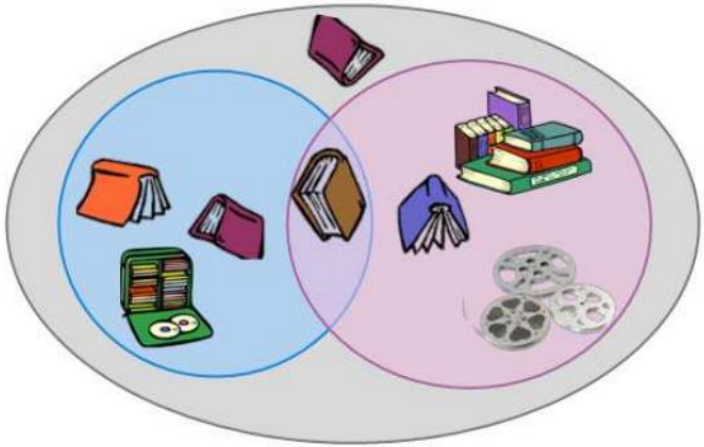
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Scopes for Summon Searches

Allow users to ‘pre-filter’ their search, limiting to a specific group vs. searching the full catalog

- Create scopes, and prioritize display order when there are multiple scopes
- Limit to local records
- Add or remove resources by ISBN/ISSN to a search scope
- Add or remove institutional repositories to a search scope
- Add or remove library locations to a search scope



2023 H2

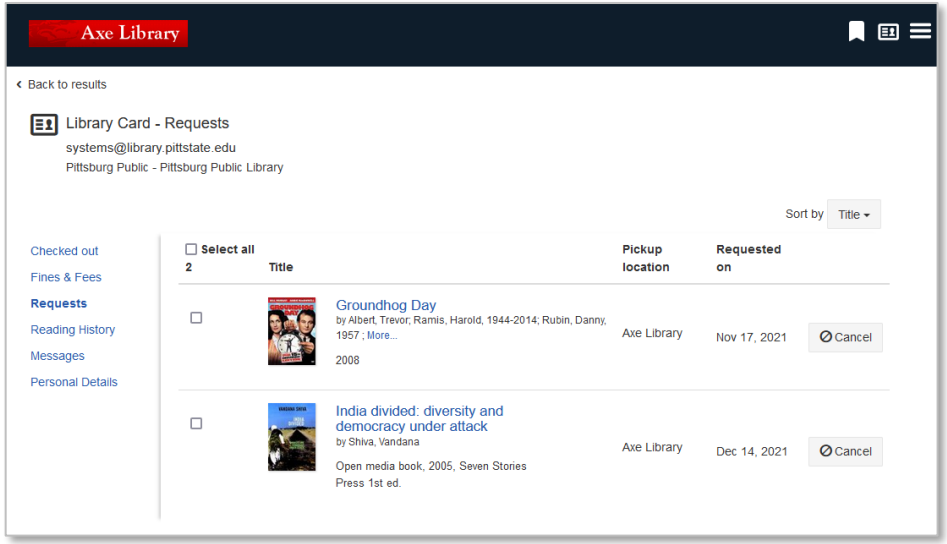
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Sierra via Summon: Course Reserves

Provide Course Reserve Support for Sierra via Summon

- Ability to provide access to course reserve links and data in Sierra via the Summon User Interface



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Improve the Quick Look Pane Layout

A more flexile layout to accommodate various metadata

- Usefulness of Quick Look pane varies based on the amount and type of metadata available for display
- Adjust the layout so the Quick Look displays all information well regardless of what information is absent or present



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Display 5xx Note Fields in Summon

Allow institution to add 5xx note fields to Quick Look

- Display both a label for and the value in the field for a result
- If the field is blank, it and its label should not be displayed

* Display of fields may require mapping and content processing and require implementation assistance by Ex Libris for each institution



NERS

2023 H2

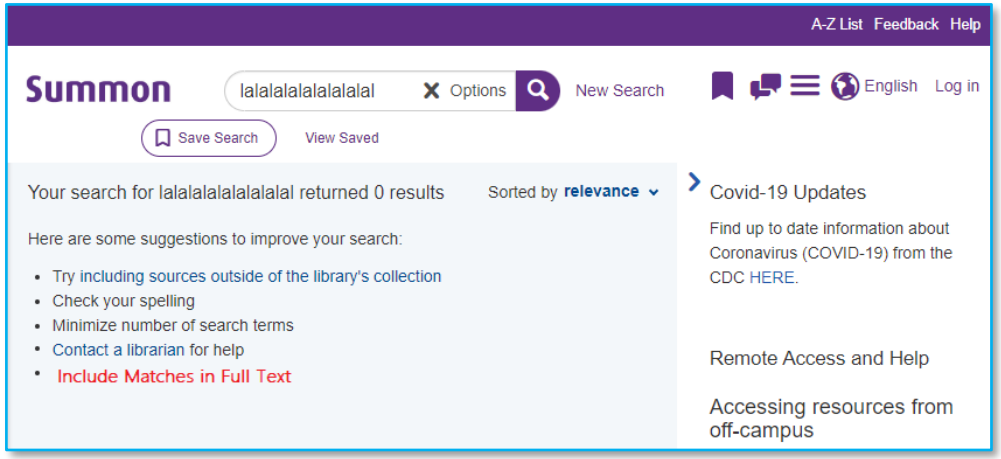
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“Include Matches in Full Text” to Search Suggestions

Improve the user experience on the Zero Results Page

- Add the ability to apply the “Include Matches in Full Text” facet via a link on the Zero Results Page
- Configurable by institution



NERS

2023 H2

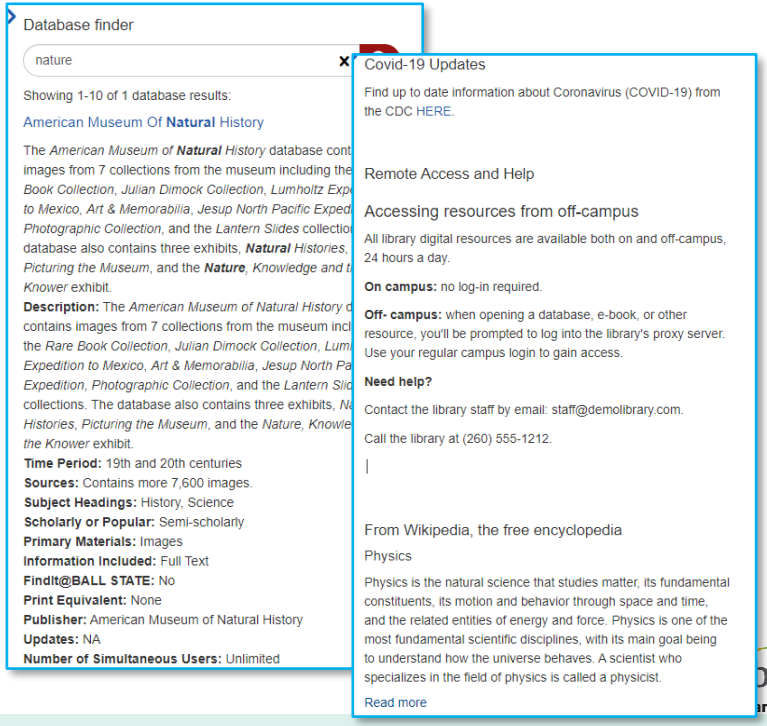
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Ability to Customize of Elements in the Right Pane

Improve the layout options for the right-hand pane

- Allow flexibility for number of results displayed by the Springshare Database Finder widget
- Allow institutions to determine order of display for Database Finder, custom panels, and Topic Explorer



NERS

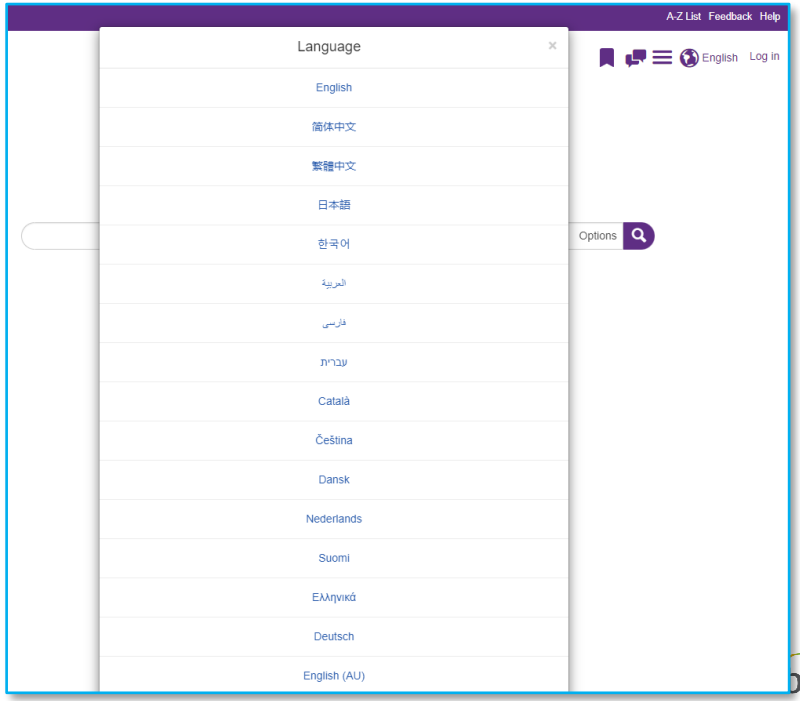
2023 H2

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Ability to Match Language Settings of Summon with 360 Link

Ensure language parameter is passed from Summon to 360 Link

- Language set by the user in the Summon user interface will also be applied in 360 Link to maintain the selected language



NERS

2023 H2

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Prevent eBook and Computer File Records from Merging

Reduce confusion caused by eBooks listed as Computer Files

- Prevent Computer File records to merge with any other Content Type
- Only allow Computer File type records to merge with each other



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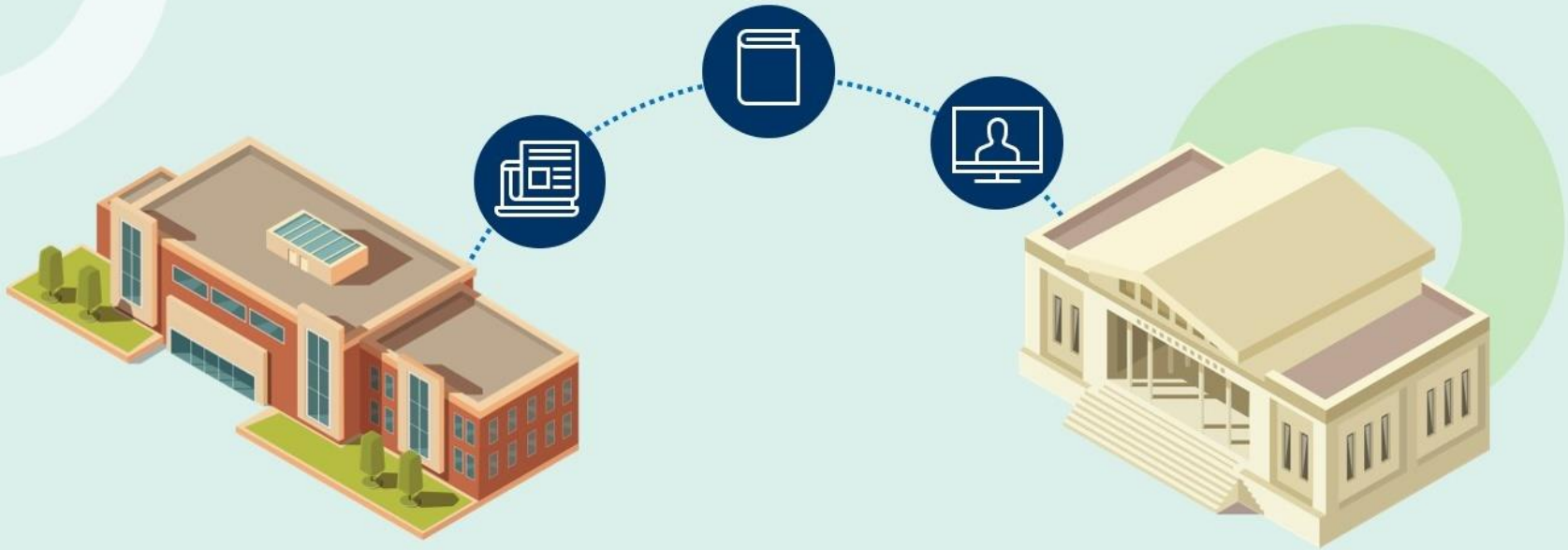
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Ongoing Improvements

Other	Accessibility
	Analytics

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CDI Improvements

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CDI Data Quality and Rights enhancements

- **CDI Rights Processing**
  - Reduce to 24 – 30 hours average
- **Data quality**
  - Improve consistency of language and publication date fields
  - Better identification of book reviews
  - Improve OA-handling, with the addition of Unpaywall as an indexed collection
- **Bigger, longer term data projects:**
  - Addition of a secondary resource types for CDI
  - Connect author names to ORCIDs (possibly other IDs) and normalize the author name
  - Separate keywords and (normalized) subjects

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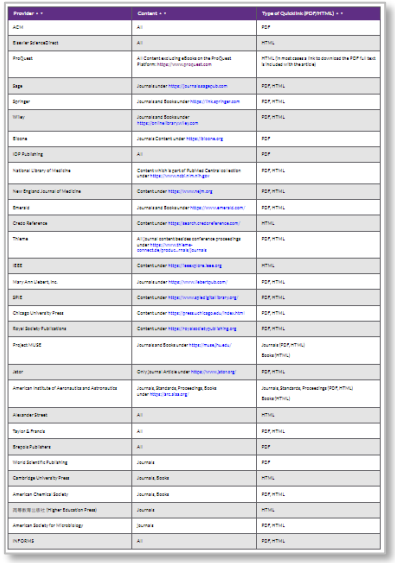
Search and Ranking

- **Known item search enhancement with AI**
  - Use of an AI-based tool to identify and parse citations for more accurate results
- **Support of Melingo** (Hebrew Search Plugin) in CDI
- **Ongoing enhancements** – based on feedback and new content

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Quicklinks

- Adding more content providers is 2023 priority
- Now with 31 supporting providers
- Over 10,500 collections with 1.55 billion records
- Some usage metrics
  - Over 250 institutions with at least 100 clicks in November
  - Over 400 institutions currently active or testing
  - More than 300,000 clicks in November
  - Linking success rates – 99%



Provider	Content	Type of Quicklinks (PDF/HTML)
ACM	All	PDF
Elsevier ScienceDirect	All	HTML
ProQuest	All Content excluding eBooks on the ProQuest Platform: https://www.proquest.com	HTML (In most cases this to claim not the PDF for text is included in the article)
Sage	Journals under https://journals.sagepub.com	PDF, HTML
Springer	Journals and Books under https://link.springer.com	PDF, HTML
Wiley	Journals and Books under https://onlinelibrary.wiley.com	PDF, HTML
Brill	Journals Content under https://brill.com	PDF
IOP Publishing	All	PDF
National Library of Medicine	Content which is part of PubMed Central (a) section under https://www.ncbi.nlm.nih.gov	PDF, HTML
New England Journal of Medicine	Content under https://www.nejm.org	PDF, HTML
Sharecd	Journals and Books under https://www.sharecd.com/	PDF, HTML
Oxford Reference	Content under https://search.oxfordreference.com	HTML
Thieme	All Journal content (articles) conference proceedings under https://www.thieme-connect.de/products/all/journals	PDF, HTML
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BMJ	Content under https://www.bmj.com/digital-library.org/	PDF, HTML
Chicago University Press	Content under https://press.uchicago.edu/index.html	PDF, HTML
Royal Society Publications	Content under https://royalsocietypublishing.org	PDF, HTML
Project MUSE	Journals and Books under https://muse.jhu.edu/	Journals (PDF, HTML) Books (HTML)
Jstor	Only Journal Articles under https://www.jstor.org/	PDF, HTML
American Institute of Aeronautics and Astronautics	Journals, Standards, Proceedings, Books under https://arc.aiaa.org/	Journals, Standards, Proceedings (PDF, HTML) Books (HTML)
Alexander Street	All	HTML
Taylor & Francis	All	PDF, HTML
Emerald Publishers	All	PDF
Hindawi Scientific Publishing	Journals	PDF
Cambridge University Press	Journals, Books	HTML
American Chemical Society	Journals, Books	PDF, HTML
高等教育出版社 (Higher Education Press)	Journals	HTML
American Society for Microbiology	Journals	PDF, HTML
IVYSPRING	All	PDF, HTML

https://knowledge.exlibrisgroup.com/Summon/Product_Documentation/Searching_in_The_Summon_Service/Search_Results/Summon%3A_Quicklinks_Provider_List

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360 and Intota in 2023

Expanding Services and Enabling Innovation

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2023 Roadmap Highlights

Auto-Holdings Management with KBART Recommended Practice

API Expansion for Integration with External Systems



Infrastructure Investment

Accessibility

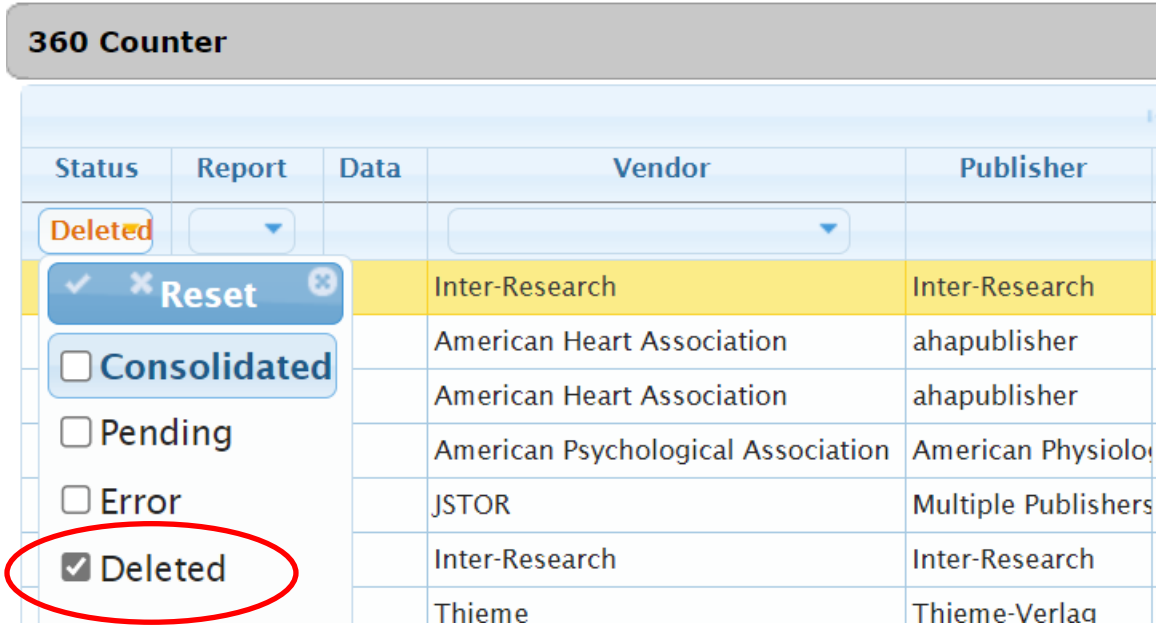
NERS Projects:
Open Access Indicator
Auto-normalization

Response to Community Reports

[360 and Intota Services Roadmap – 2023 - Ex Libris Knowledge Center (exlibrisgroup.com)]

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2023 Q1: New COUNTER Report Status



- Easily see that a report's data was deleted
- Eliminate Support queries
- Understand a report's history

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2023 Q1: Reduce Change Records in 360 MARC

- After June database upgrade, there was a sharp increase in the number of changed records for unnormalized titles
- Improved Title and Publisher handling will
  - Stabilize unnormalized record generation in monthly runs
  - Result in fewer changed records
  - Decrease time needed to load MARC files into the ILS

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2023 Q1: Additional Improvements

- New linkers for Ebook Central, Nature, and Clinical Ethics.
- Disabled Crossref enrichment for titles when Summon is the referring source.
- Implement database upload capability in Intota
- Implement KBART file upload capability in Intota
- In Consortium Edition: Provider-specific linking parameters (e.g. EBSCO Authorization Settings) will be inherited by member libraries and display in the member library settings.

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Looking Ahead …

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Key Initiatives

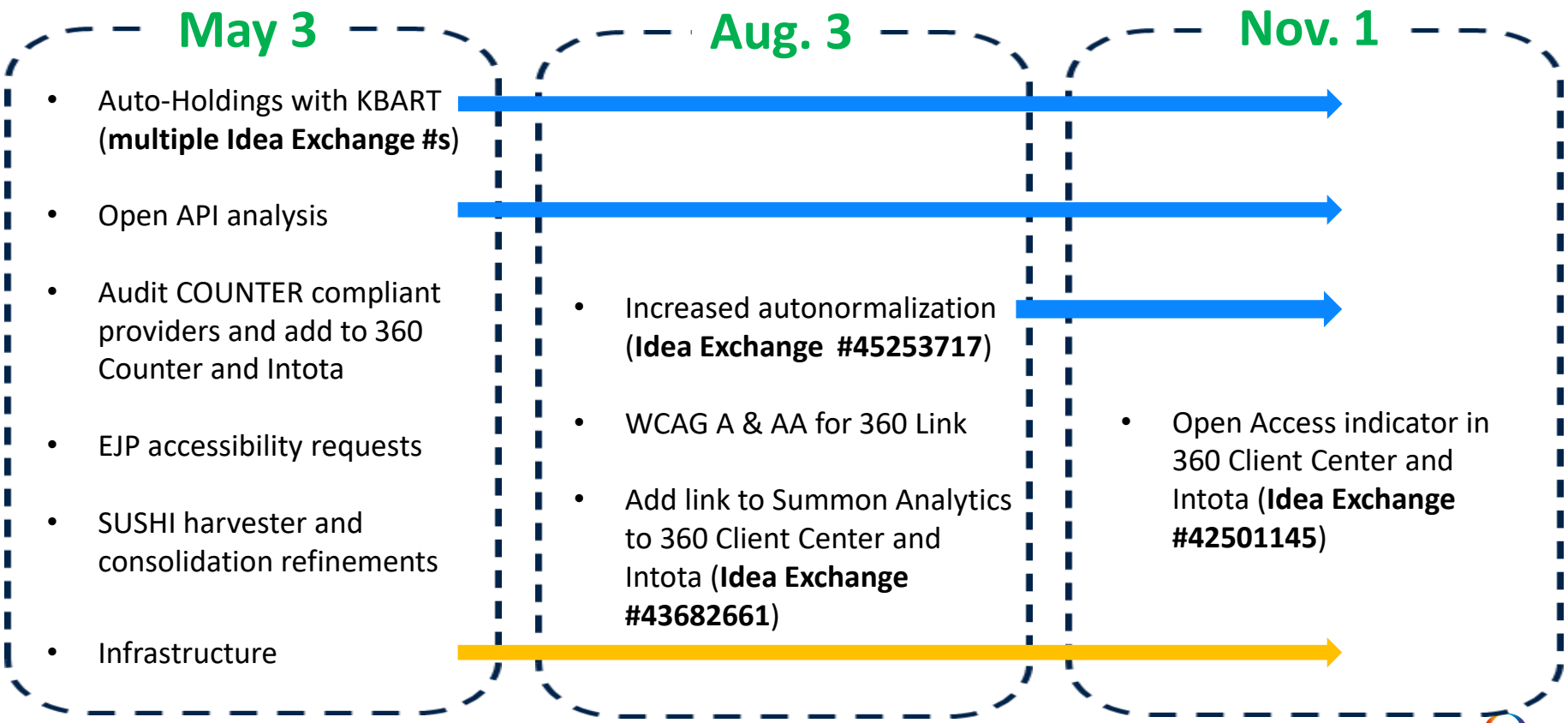


- Increase ROI by providing auto-holdings management services for
  - Taylor & Francis
  - Springer
  - Elsevier
  - Wiley
  - Ovid
- Foster open integration with remote systems by expanding our API capabilities
- Address NERS ideas
  - Open Access indicator from the 360 KB
  - Increase normalization rates to limit one-off requests

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Delivery Targets



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Upcoming Webinars and Community Engagement

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Upcoming Webinars and Activities

- **Content Quarterly Webinar - Data Excellence at Your Service**
  - EMEA/APAC – March 21
  - Americas/EMEA – March 21

- **What's New with Summon**
  - Americas/APAC – April 18
  - EMEA/Americas – April 19
  - Americas – April 19

- **Additional events**
  - ELUNA: May 9 – 12 in Los Angeles, California
  - IGeLU: September 11 – 14 in Leuven, Belgium





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Your Direct Impact

Through the New Enhancement Request System (NERS) & the Idea Exchange

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NERS Candidates Completed in 2022

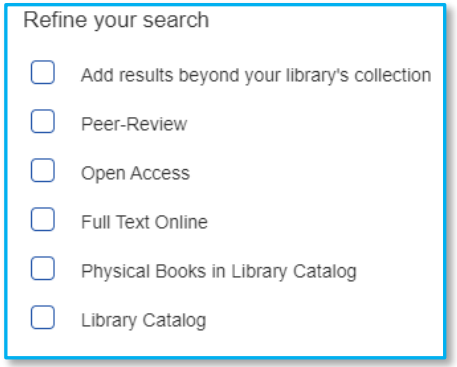
- Refine Content Type Web Resource to Identify Online Newspaper Articles
- Display Coverage Dates for E-journals in Summon Results
- Ensure OA link Is Available for Open Access Content
- Collection Discovery for Summon over Alma
- Design and plan for LTI for Summon

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Idea Exchange suggestions completed in 2022

- Ability to re-order the facets listed in Refine Your Search section of the Summon results display
- Improved usability for Advanced Search
- Make Custom Panels visible for mobile users
- Move language dropdown out of the hamburger menu
- Make citation styles customizable
    - Includes making the following styles available via citationstyles.org: Chicago Notes-Bibliography Style, MHRA referencing citation style, Council of Science Editors (CSE) formatting style, the style guide for ACS (American Chemical Society), and to current editions for many other supported styles, including AGLC4
- Addressed issue with persistent display of all information on Preview Pane



https://ideas.exlibrisgroup.com/

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Idea Exchange suggestions completed in 2022

- Limit the EJP autocomplete suggestions to subscribed titles
- Show the MARC record availability percentage at the database level
- Change EJP sort order to favor main title over alternate titles
- Database order in 360 Link and EJP: Make it possible to upload changes in a file
- Allow KBART uploading for library specific holdings
- Included as part of developing KBART support, began developing solutions for auto-holdings with additional providers
- Consortium Sharing: “Terms of use” should be shown in EJP on “From Consortium titles

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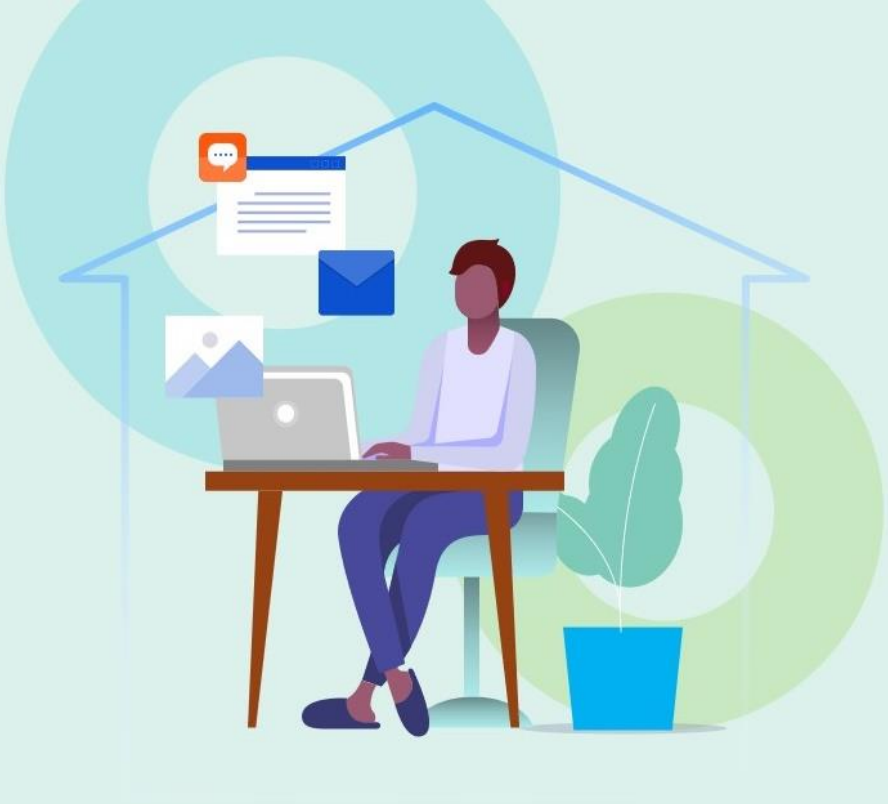
Questions?

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