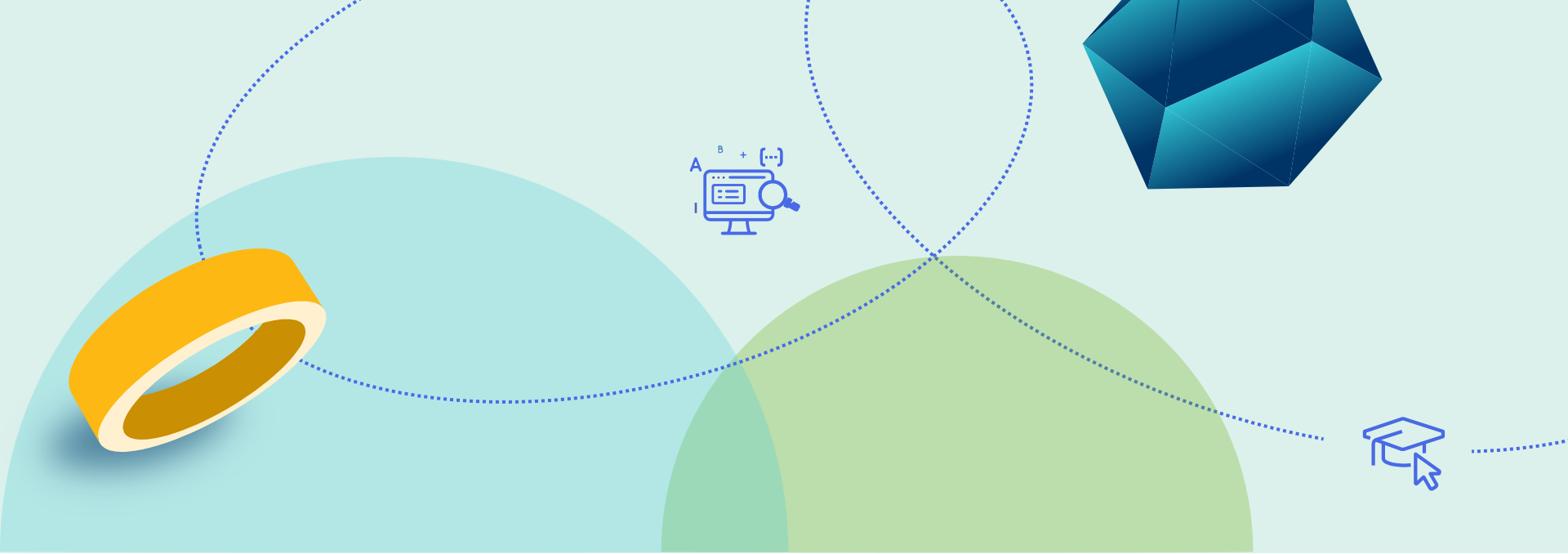


Get the Maximum Value Out of Summon

October 2020

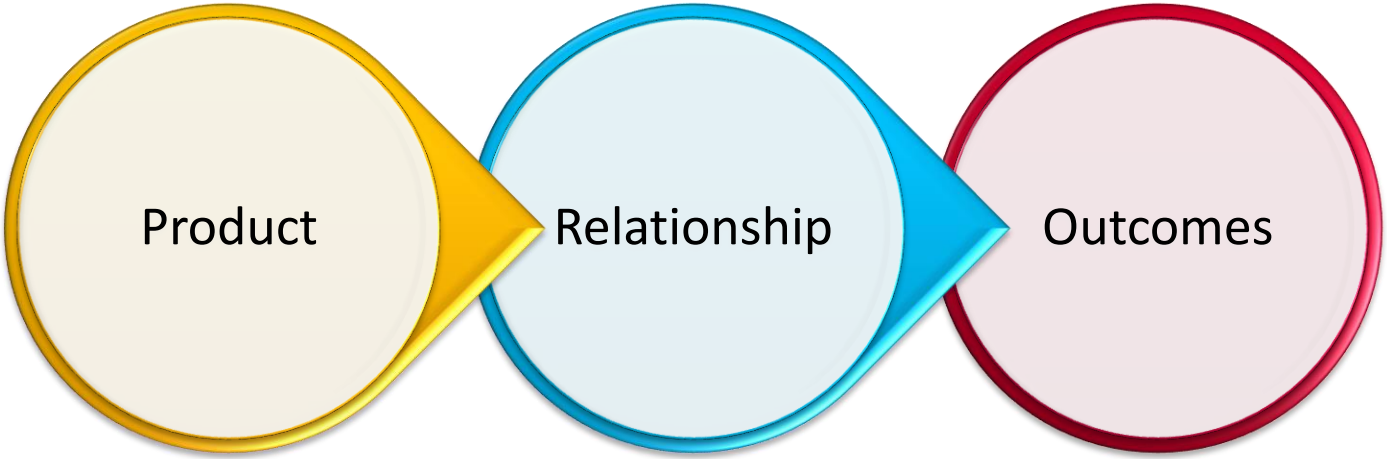
Patty Brehm – Customer Success, North America
Sian Blake – Customer Success - EMEA

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Quick Introductions

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CUSTOMER SUCCESS IS SIMPLY ENSURING THAT YOUR CUSTOMERS ACHIEVE THEIR DESIRED OUTCOME THROUGH THEIR INTERACTIONS WITH YOUR COMPANY. THAT'S IT.

LINCOLN MURPHY

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About Ex Libris Customer Success

Our team is here to:

- *Share best practices about how libraries use our products*
- *Help you make them work for your local needs*
- *Make it easy to get more value*

- How we do that:
  - Listen
  - Share information & best practices
  - Work alongside you



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Why We Chose This Topic:

- We understand that academic libraries and other institutions will have to make difficult decisions for the next fiscal year.
- While there are a variety of Summon Analytics and statics, we are focusing solely on reports that provide key information on library holdings.
- When we define the value of Summon we are looking at a few things:
  - What tools are available to you in 360 Core (Client Center) & Summon
  - Tools we can provide you with to assess patron behavior and improve the visibility of key library holdings/resources.

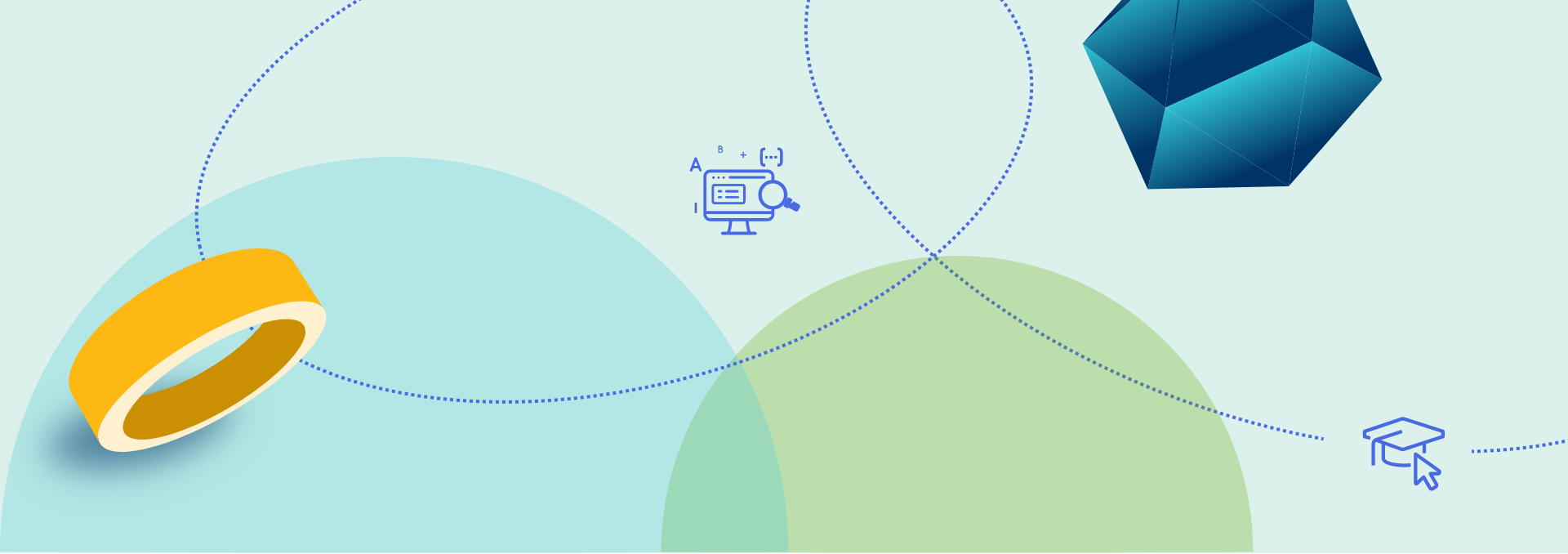
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What customers are telling us:

- The unique challenges posed in the 2020-2021 academic year will have significant consequences in the 2021-2022 school year.
- For institutions focusing on hybrid/remote learning, librarians' focus & attention has shifted to learning management systems and e-resources.
- Balancing the demands of the new normal and taking time to strategically assess your library holdings/budgetary concerns is a key priority.
- Must be an efficient process.

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360 Core Business Intelligence Reports

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360 Core's Business Intelligence Tools are often overlooked.

- Let's focus on several key out-of-the-box reports available to 360 Core/Summon customers
  - Management Reports including the Database Details report
  - Data on Demand
  - Overlap Analysis
- If you subscribe to other 360 Services, more data may be available.

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Management Reports Cont.

DEMO

- Variety of reports to give you a bird's eye view of your holdings such as:
  - Tracked eBooks
  - Tracked eJournals
  - Tracked Resources
  - Tracked Videos
  - And more!
- Key Knowledge Center Resource: click here

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Database Details Report



- What is it?
  - A bird's eye view of your **database subscriptions**
- Why is it important?
  - Provides a list of all the databases your library subscribes to, so long as the status is anything BUT "Not Tracked"
  - Delivers all information found in the Database Details page you'd see in the Client Center
- Key Knowledge Center Resource: click here

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Overlap Analysis

DEMO

- What is it?
  - A powerful assessment tool highlighting e-journal and e-book titles that are available in more than one database
- Why is it important?
  - Shows you
    - The number of e-journal and e-book titles that are unique to that database, and the number that are available elsewhere in your collection.
  - Helps you
    - Identify databases that deliver the most value for your library
    - Evaluate possible changes to your collection
    - Get the most out of your electronic resources budget, increasing the depth and breadth of your e-collections
- Key Knowledge Center Resource: Click here

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Overlap Analysis Report Terms

- The following terms are helpful for interpreting the report:
  - Title Unique – Journals and books available in only 1 of your databases
  - Holding Unique – Journals are available in more than 1 database BUT with different coverage dates.
  - Total Unique – Title Unique + Holding Unique
  - Full Holding Overlap - Journals and books available in more than one database, **coverage dates completely overlapped** by at least 1 holding
  - Partial Holding Overlap – The coverage dates are only *partly* overlapped by another title

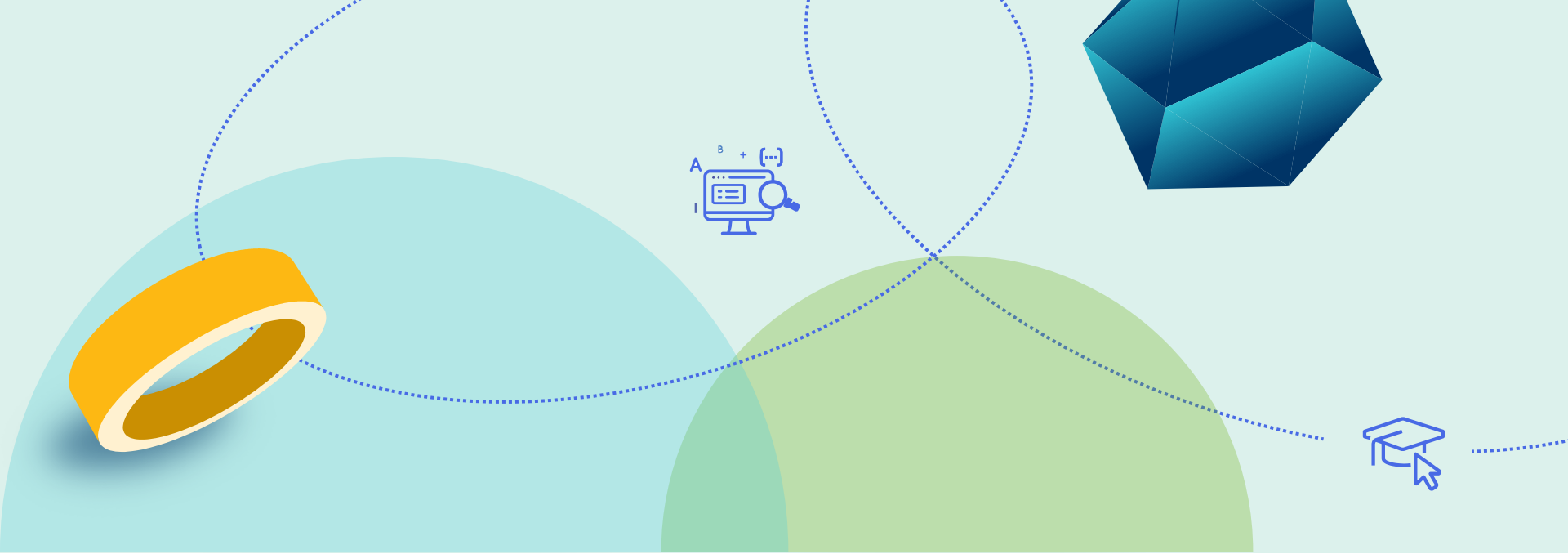
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Data on Demand



- What is it:
  - A report of your library's holdings, including books & journals.
- Why it's important:
  - Get a holistic view of all your holdings
  - Take a look at your resources by type in individual reports
    - Journals
    - eBooks
    - Etc.
- Key Knowledge Center Resource: click here
- Note: Not available in Intota, but Ex Libris Support can help generate a Data on Demand report for your institution

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Summon Out-of-The-Box Reports

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Summon Analytics Reports FY 2021



- For collection development:
  - Popular Searches
  - Zero Result Searches" can also be used to identify gaps in coverage or for collection development

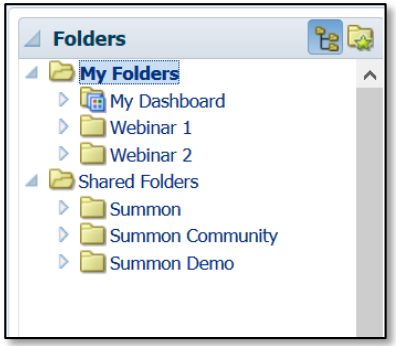
- For assessing user behavior
  - Action Usage
  - Session Usage
  - Title Clicks
  - Device Usage

- Key Knowledge Center Resource: click here

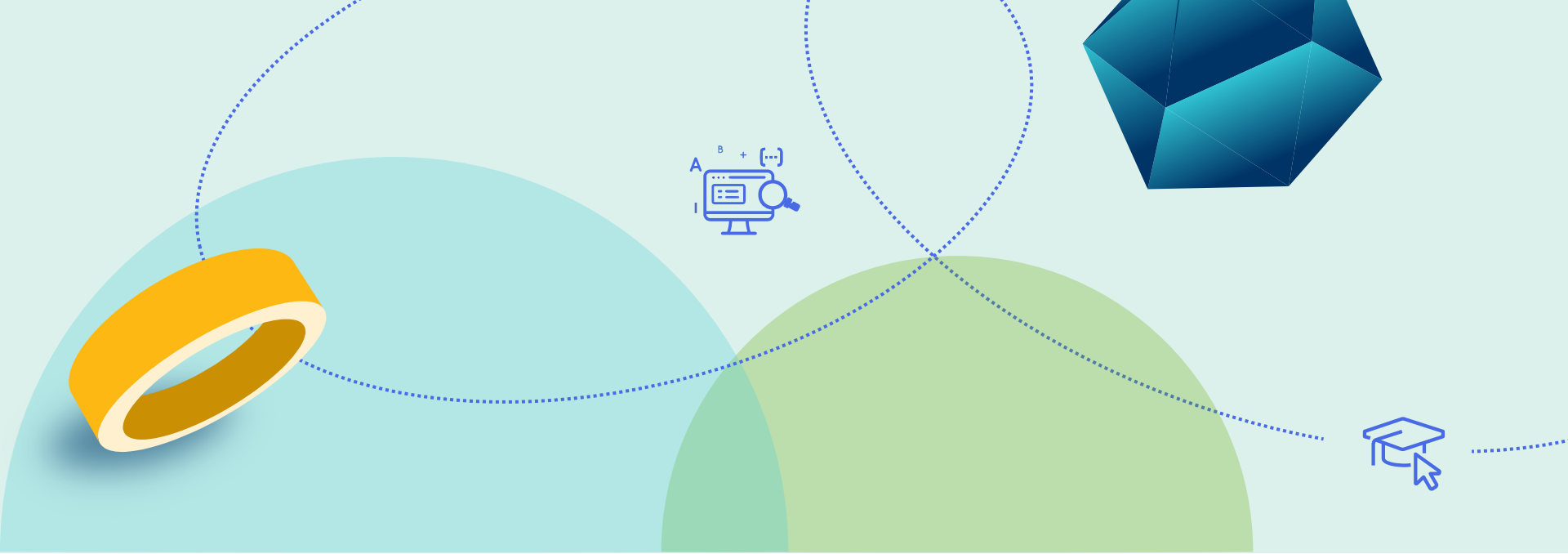
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Oracle Analytics Server (OAS) Upgrade

- Coming soon!
- What's happening to my OBI reports?
  - After November 15, new or updated OBI reports will not be migrated to OAS
  - All current OBI Analytics reports saved, will be migrated to OAS except for those under My Folders
- Go Live with OAS on Nov. 22
- Key Learning Resources:
  - Upgrade overview
  - OBI report saving tutorial



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Other Resources

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Developed by the Summon User Community

- Slides from "Data Informed Stewardship of Search & Discovery: A Yale University Case Study"
  - Sarah Tudesco, Program Director – Assessment and User Experience Research, Yale University
- Discover What Your Users are Discovering: Leveraging a Preconfigured Google Tag Manager Container on Summon
  - Tabatha Farney, Tabatha Farney, Director of Web Services and Emerging Technologies & Associate Professor, University of Colorado – Colorado Springs

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Summon User Community Resources cont.

- Integrating a Local Art Museum Collection Into Summon Results
  - Steven Brown, E-resources Access Manager, University of Colorado Boulder
- Boosting Resource Visibility with Custom Right-Hand Panels
  - Amy Fry, Associate Professor, E-resources Librarian, Bowling Green State University
- User Testing Your Way to a Better Summon Interface
  - Brian Holda, Digital Services Librarian, Davenport University

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Exclusive to ELUNA & IGeLU

- What Analytics Tell Us about Facet Use (ELUNA 2019)
  - Angela Sidman, Director of E-Resources and Serials Management, Yale University
  - Nicole Trujillo, Assistant Profess and Access & Discovery Librarian, University of Colorado
  - Ken Varnum, Sr. Program Manager, University of Michigan
- Why Pay Twice? Using the 360 Overlap Analysis Tool (ELUNA 2019)
  - Mandi Smith, Assistant Librarian, University of Arkansas
- Down the Infinite Rabbit Hole: The Use of Google Analytics & OBI at the University of Leeds
  - Elly Cope, Access and Acquisitions Manager, University of Leeds
  - Trevor Hough, Subscriptions and E-Resources Coordinator, University of Leeds
- Gaining insights through Summon logs (ELUNA 2017)
  - Kathryn Silberger, Digital Content Services Librarian, Marist College

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Thank you!

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