

Getting Involved with the Summon Community

Taylore Schaefges
Ex Libris Customer Success Team

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“Community is a feeling of fellowship with others, as a result of sharing common attitudes, interests, and goals.”

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- **Getting Connected – Online!**
  - Listserv, Social Media, Podcasts, Ex Libris Blog, YouTube, Idea's Exchange, Knowledge Center,
- **Customer Success Community**
  - CS Program, CS Events, & Connecting Customers
- **Get Involved - Ex Libris User Groups**
  - ELUNA & IGeLU, the Summon/360 Product Working Group

Introduction

Taylore Schaefges

- Customer Success Community Specialist
- Graduated from the University of Missouri in 2018
- Lives in downtown Chicago, Illinois
- Fun Fact: I own a cat and a dog (German Shepherd)



http://hdl.handle.net/10217/40784

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Getting connected – Online!

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The Summon Mailing List / Listserv



- A forum to connect with fellow Summon users and Ex Libris Staff
- The Listserv provides:
  - New enhancement and release information
  - New content and databases in the Summon Index
  - Updates on planned maintenance

- Who can access the Summon ListServ?
  - All active Summon subscribers!
  - Main Summon ListServ or Regional Listservs
  - https://exlibrisusers.org/listinfo

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Summon ListServ

How do I sign-up?

- Open the following page: https://exlibrisusers.org/listinfo/summon.
- Fill out the following form:

Subscribing to Summon

Subscribe to Summon by filling out the following form. You will be sent email requesting confirmation, to prevent others from gratuitously subscribing you. Once confirmation is received, your request will be held for approval by the list moderator. You will be notified of the moderator's decision by email. This is also a hidden list, which means that the list of members is available only to the list administrator.

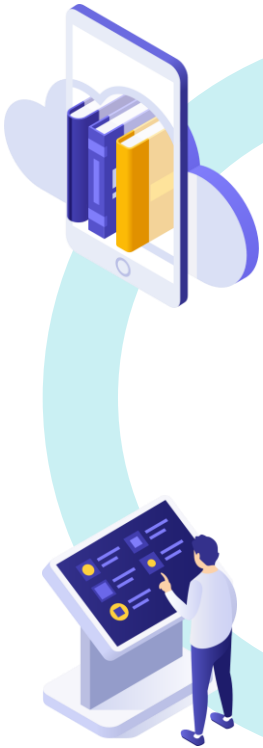
Your email address:	
Your name (optional):	

You may enter a privacy password below. This provides only mild security, but should prevent others from messing with your subscription. **Do not use a valuable password** as it will occasionally be emailed back to you in cleartext.

If you choose not to enter a password, one will be automatically generated for you, and it will be sent to you once you've confirmed your subscription. You can always request a mail-back of your password when you edit your personal options.

Pick a password:	
Reenter password to confirm:	
Which language do you prefer to display your messages?	English (USA)
Would you like to receive list mail batched in a daily digest?	◉ No ○ Yes

Subscribe



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Posting to the Summon Listserv

- What Sort of Things Can I Post?
  - Questions related to Summon/360 Products
  - Tips and tricks to share with your fellow Summon users
  - Job opportunities available at your library
- Posting to the Summon ListServ
  - To post to the mailing list, send an email to the following address: summon@exlibrisusers.org.



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Staying Connected Through Social

- Ex Libris Social Media
  - Follow us on Twitter, Facebook, LinkedIn, and YouTube
- Ex Libris Blog
  - The Ex Libris blog brings you the latest on Ex Libris initiatives and solutions.
  - Example Article: Resource Sharing: What Will We Keep from the Pandemic?
  - Sign up here!
- Ex Libris Podcast
  - 'Citing the Obvious'
  - Available on all podcast platforms



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Summon Ideas Exchange

Share Your Ideas

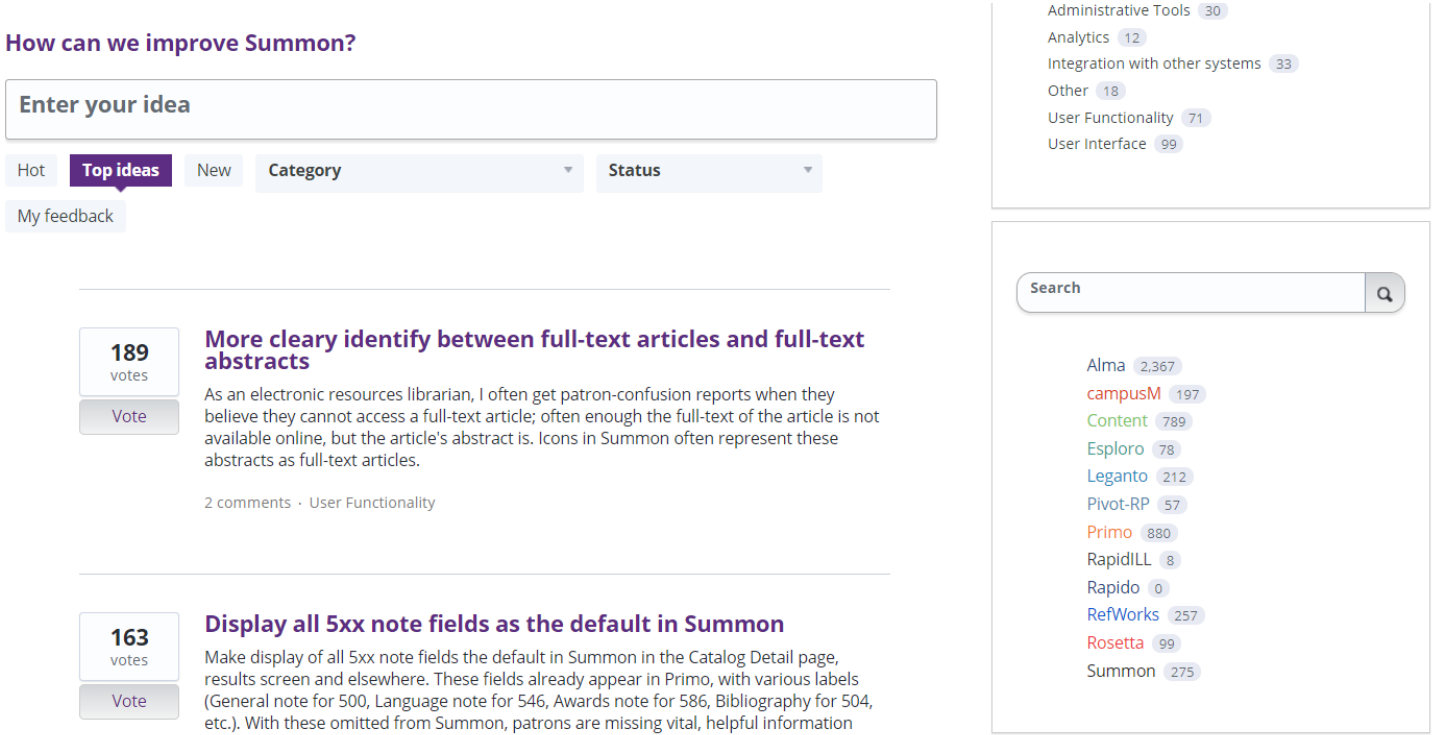
Support Your Favorite Ideas

Give Feedback on Popular Ideas



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Summon Ideas Exchange



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Summon Ideas Exchange - How It Works

- You can potentially submit 25 ideas
  - You are given 25 “points” to use as desired
  - If you submit an idea, you must give it at least 1 point
  - Points can be used for submitting an idea or supporting an idea
- Ex Libris will review the most popular ideas
- Your ideas influence what enhancements are incorporated into our Summon roadmap



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Content Ideas Exchange



- How Ex Libris can improve content
- Your input helps us to extend our Discovery Indexes and KnowledgeBases
  - Tell us what collections and data you'd like to see added!
- Add your suggestions here!

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Summon Knowledge Center

- Check out Summon in the Ex Libris Customer Knowledge Center to find out more about:
  - Product Documentation
  - Training
  - Knowledge Articles
  - Release Notes
  - Roadmap
  - Release Schedule
  - Content Corner
  - Product Highlights
  - Best Practices



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Summon Knowledge Center

- We've been doing some work on the Summon Best Practices and How-To's page
- New sections:
  - Discovery optimizations and library recommendations
  - Summon specific materials designed to share with your patrons
- Find articles like:
  - Data Optimization Best Practice Toolkit
  - Using Summon Analytics to Make Strategic Decisions



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Summon API Developer Network

- Collaborate and share Summon API development experiences on the Developer Network.
- Read up on in-depth documentation for configuring Summon APIs
- Summon Tech Blog: Where you can find and share success stories on using the Summon API



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Customer Success Community

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Customer Success - Ways We Can Help



Configuration Reviews

Advise on features/services that might benefit library users



Training & Education

Break down what you need to know about your services



Information Sharing

Emails about upcoming releases and new features



Leveraging Resources

Get customer in touch with the right departments and people at Ex Libris

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Customer Success Community

- Monthly featurettes
  - Distilled product/best practice recommendations in your inbox
- Connecting Customers
  - Information sharing and example Summon sites
- “White Glove” Service
  - Individual walk-throughs, overviews, and discussion
- Listening and lending a hand
  - Meeting you where you are and helping you move forward

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Customer Success Webinars & Events

- Webinar Program
  - Analyze This! – Getting Started With Summon Usage Reports
  - Summon How to Optimize Your Data for Discoverability
  - What We've Learned from the Pandemic - Key Strategies for Summon Customers
  - What’s New with Summon



- Special Events
  - Summon Customer Days

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Get Involved - Ex Libris User Groups

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ELUNA

IGeLU

Product Working Groups



Ex Libris Customers Across the Globe

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IGeLU & ELUNA User Groups

- Promote the exchange of information among the users of Ex Libris products to enhance their library services
- Sharing ideas on solutions, innovations, documentation, and resources.
- IGeLU & ELUNA Conferences: Members can attend for a discounted fee
- Explore IGeLU and ELUNA on:
  - http://igelu.org
  - https://el-una.org/



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ELUNA and IGeLU Membership Details



- Any institution with a contract for an Ex Libris product can become a member
  - To become a member, you will need to complete an application form
  - Once your institution is accepted and submits the membership fee, you will gain access all the benefits of the organization

- For more information on membership fees please visit the ELUNA and IGeLU membership websites

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Summon Working Group

- Subset of ELUNA members dedicated to the product development of Summon
- 8-9 team members
- Team members are involved with collaborative testing, training, focus groups, and NERS enhancement voting



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NERS Enhancement Request Process

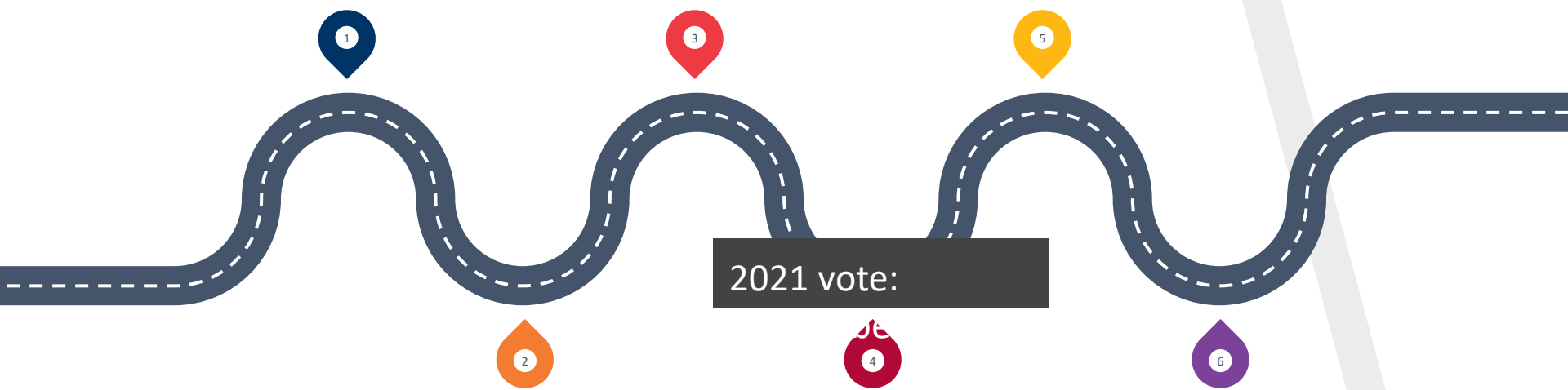


- IGeLU and ELUNA enhancement voting process is the only channel for “road-map commitment”
- Popular ideas submitted via the Ideas Exchange influence the NERS process on what will be included in the Summon roadmap
- How do I get involved with the NERS process?
  - Institutions should be an ELUNA or IGeLU member.
  - The institution must have a NERS account.

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NERS Process

1. The Summon working group obtains a report of Summon and 360/Intota ideas from the Idea Exchange.
2. The team reviews every idea and develops a preliminary list for the NERS ballot.
3. The team consults Brent Cook on selected ideas to make sure they're not already on the road map.
4. The ideas are loaded into NERS, and the ballot is announced on the Summon listserv.
5. The team submits the top vote-getters to Brent Cook for assignment of complexity points; makes final selections based on the points budget.
6. The team and Brent announce the new set of road map commitments to the Summon community.





Questions?

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Thank you!

Taylore.Schaefges@ExLibrisGroup.com

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