

Summon Quarterly Update and Q&A

May 2020

Brent D. Cook
Director of Product Management, Summon

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- Highlights of 2019 Improvements
- Review 2020 Roadmap
  - Highlights of February Summon Release and Launch of CDI for Summon
  - Review May release
  - Targets for upcoming releases
- Best Practices and Support Materials for Working Remotely



Highlights of 2019 Improvements

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Summon 2019 Release Schedule



February 2019

- Short URL for Citations (NERS—released in December)
- Citation Trail
- Configurable Topic Sources for Topic Explorer (addition of Oxford University Press in March)

May 2019

- Glanceability
- Related Items
- Summon Over Alma: (April) Publish Collection Level URL with Electronic Holdings

August 2019

- Public Notes in Summon Results (NERS)
- Integration with Leganto
- Improved Facets (NERS)
- Open Access Facet Reporting

November 2019

- Linked Data
- Improved handling of video content
- Topics: Recall/Precision Improvements
- IEDL Reporting in OBI (NERS)
- Unpaywall

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Unpaywall

SEARCH AND EXPLORING



Customer Value

- Additions of direct links to PDFs from Unpaywall in search results



Feature Highlights

- Access to full text without the need for additional log in information
- Initial release will include links to PDFs; does not include facet functionality

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Video Improvements

USER EXPERIENCE



Customer Value

- Better visual treatment of video content in Summon results



Feature Highlights

- Additional thumbnail images for video content
- Play icon with video player functionality

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Open Access Reporting

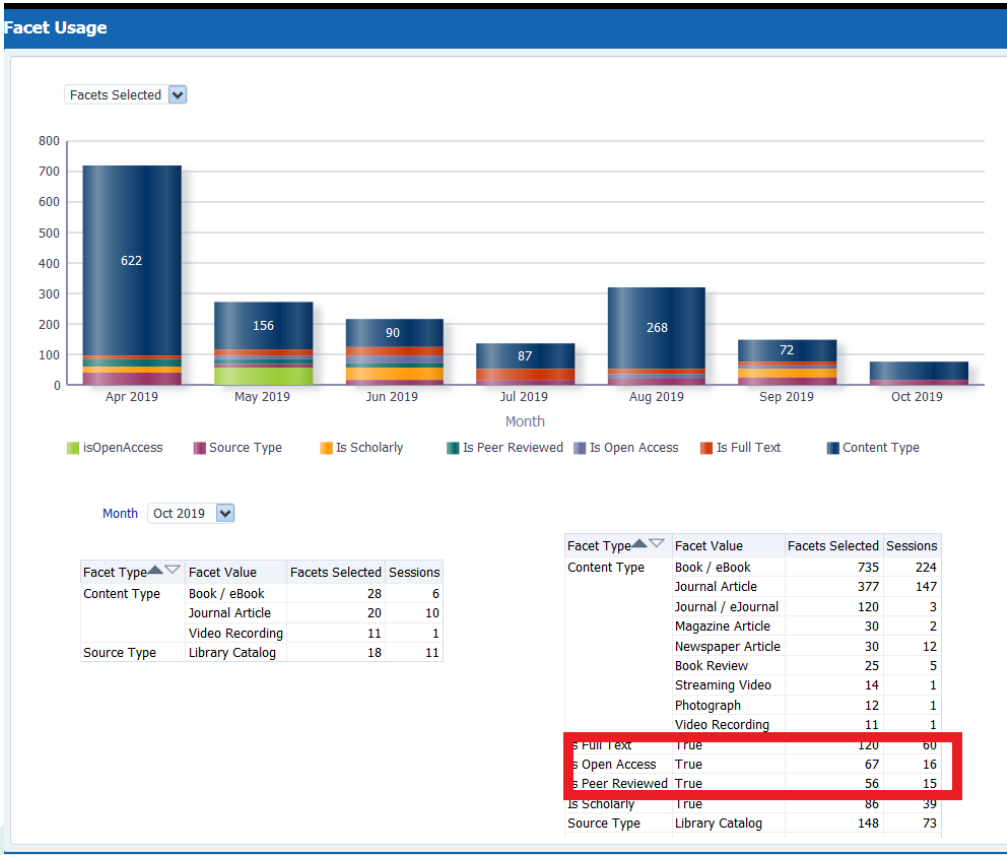
OPEN SYSTEM

Customer Value

- Show importance and usage of Open Access content within an institution's instance of Summon

Feature Highlights

- Provide reporting on number of searches where the Open Access facet is applied



Facet Type	Facet Value	Facets Selected	Sessions
Content Type	Book / eBook	28	6
	Journal Article	20	10
	Video Recording	11	1
Source Type	Library Catalog	18	11

Facet Type	Facet Value	Facets Selected	Sessions
Content Type	Book / eBook	735	224
	Journal Article	377	147
	Journal / eJournal	120	3
	Magazine Article	30	2
	Newspaper Article	30	12
	Book Review	25	5
	Streaming Video	14	1
	Photograph	12	1
	Video Recording	11	1
s Full Text	True	120	60
s Open Access	True	67	16
s Peer Reviewed	True	56	15
Is Scholarly	True	86	39
Source Type	Library Catalog	148	73

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IEDL Reporting

LIBRARY EMPOWERMENT

NERS



Customer Value

- Determine what content is being used and how it is being accessed from Summon



Feature Highlights

- Report on click path from Summon results to content
- The report, “Title Clicks,” can be found in the Summon Community folder

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Summon 2020 Release Schedule

Introduction of CDI and New Features

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Notes on the Roadmap

- This roadmap is for informational purposes only.
- We will continue to review the roadmap for 2020, taking into consideration any impacts remote access and support may have on proposed features
- Inclusion of functionality will be based on capacity and potential risk vs benefit and will take into consideration impact to remote support

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Summon 2020 Release Schedule



February 2020

Introduction of CDI

- Improved performance and an upgrade to SOLR 7
- New facets
  - Author/creator
  - Collection (Database)
- Sort results by title or author
- Match & Merge improvements
- Search for authors or co-authors by ORCID IDs

May 2020

- Linked Data
- WhatsApp Integration

August 2020

- Add Section number to Course ID in Course Reserves page
- Consistent link back to search results
- Improve peer-review labeling
- Display books and ebooks edition and publication year in brief results
- Accessibility improvements for WCAG compliance

November 2020

- Clarify author and editor in results and citations
- Databases A-Z List for Summon
- Mechanism for Best Bets to 'harvest' LibAnswers FAQs (from SpringShare)
- Keep search refinements when moving to Advanced search
- Sierra Integration (Initial Phase)

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February Release

Launch of CDI

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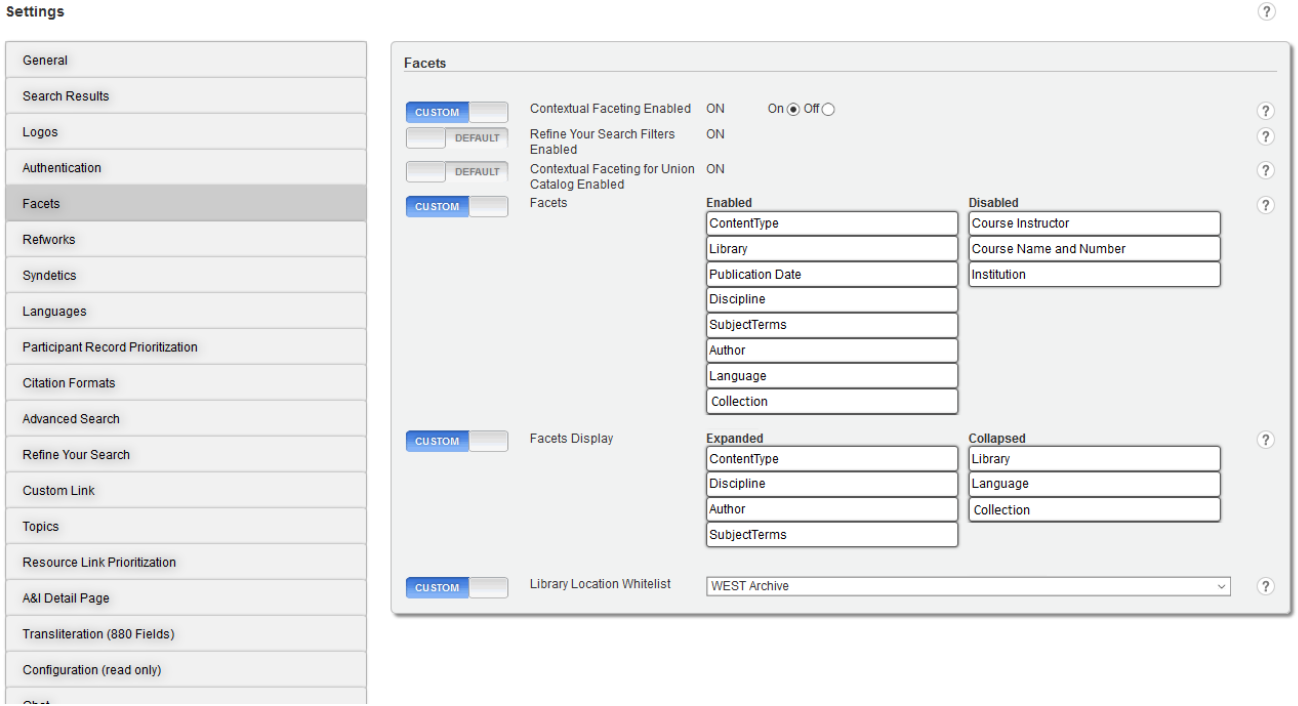
Central Discovery Index (CDI) Launched in February

- Summon customers went live with CDI on February 5
- Includes:
  - Improved performance and an upgrade to SOLR 7
  - New facets
    - Author/creator
    - Collection (Database)
    - The ability to sort results by title or author
  - Match & Merge improvements
  - The ability to search for authors or co-authors by ORCID IDs
  - New content providers and institutional repositories

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New Facets

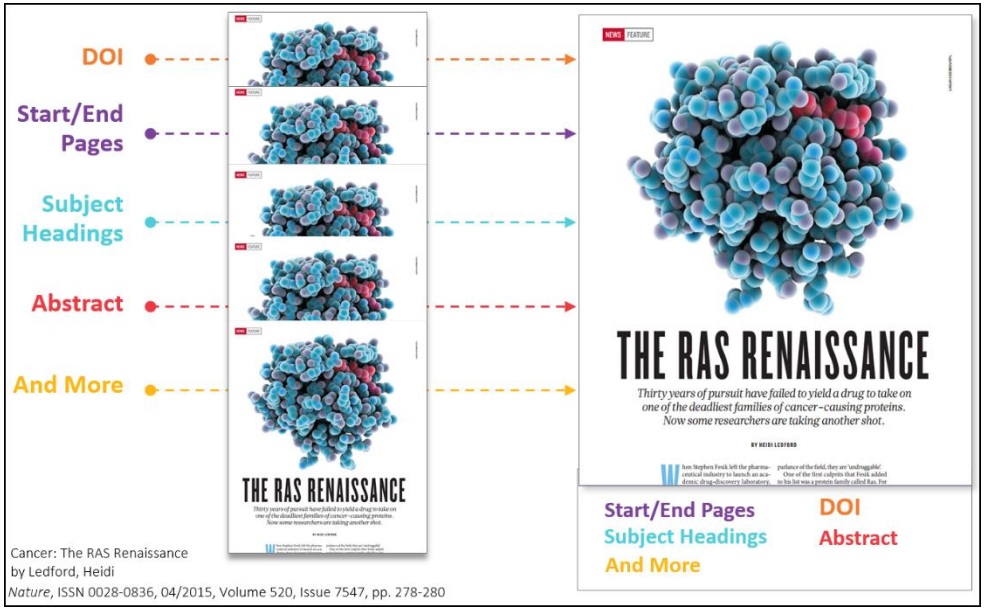
- Author/creator
- Collection (Database)
- The ability to sort results by title or author
- Recently added items facet



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Match & Merge Improvements to Reduce Duplicates

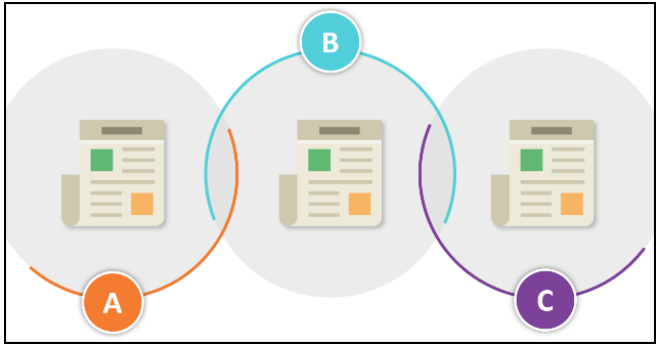
- Added newsletters to merge process
  - Reduce the overall footprint of these content types
- Improving subtitle handling
  - Reduce number of merges prevented by variations in the subtitles
- Increased overmatch limit
  - Improves matching of records with exceptionally large numbers of duplicates



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Match & Merge Improvements to Reduce Duplicates

- Relaxed language matching
  - Resolved discrepancy between Language Detected and sys_language
- Standardized quotation marks
  - Ensure different formats (" vs “ vs ”) don’t prevent merging
- Better handling of synonyms
  - Color vs. Colour

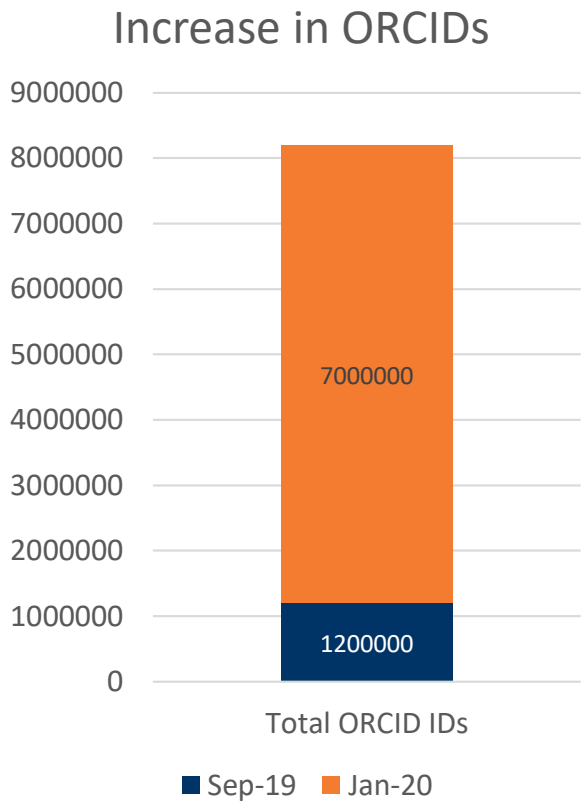


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Search by ORCID

- Enter an ORCID into Summon and search directly

  (ORCID:XXXX-XXXX-XXXX-XXXX)
- Includes both authors and contributors
- Currently 8.2 million ORCIDs in the index



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Content Growth in 2019

- 225 million Open Access records in the index
  - Up from 200 million at the beginning of 2019
  - 61 new open access Institutional Repositories available
- 38 new providers
- 3.944 billion records in the index
  - Increase of over half a billion records
  - Started 2019 with over 3.430 billion records

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May Release

Limited UI Changes

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Linked Data

SEARCH AND EXPLORING



Customer Value

- Leverage linked data to create relationships and better expose metadata for use within Summon and in linking to external sources



Feature Highlights

- Expose additional metadata on the details page for SEO support

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search engine indexing

- open Summon to webcrawlers via sitemap
  - configurable what portion of data can be crawled
- drive traffic to Summon instances via Google, Bing etc
- provide crawler with meaningful and descriptive content via JSON-LD
- canonical URLs for Summon resources

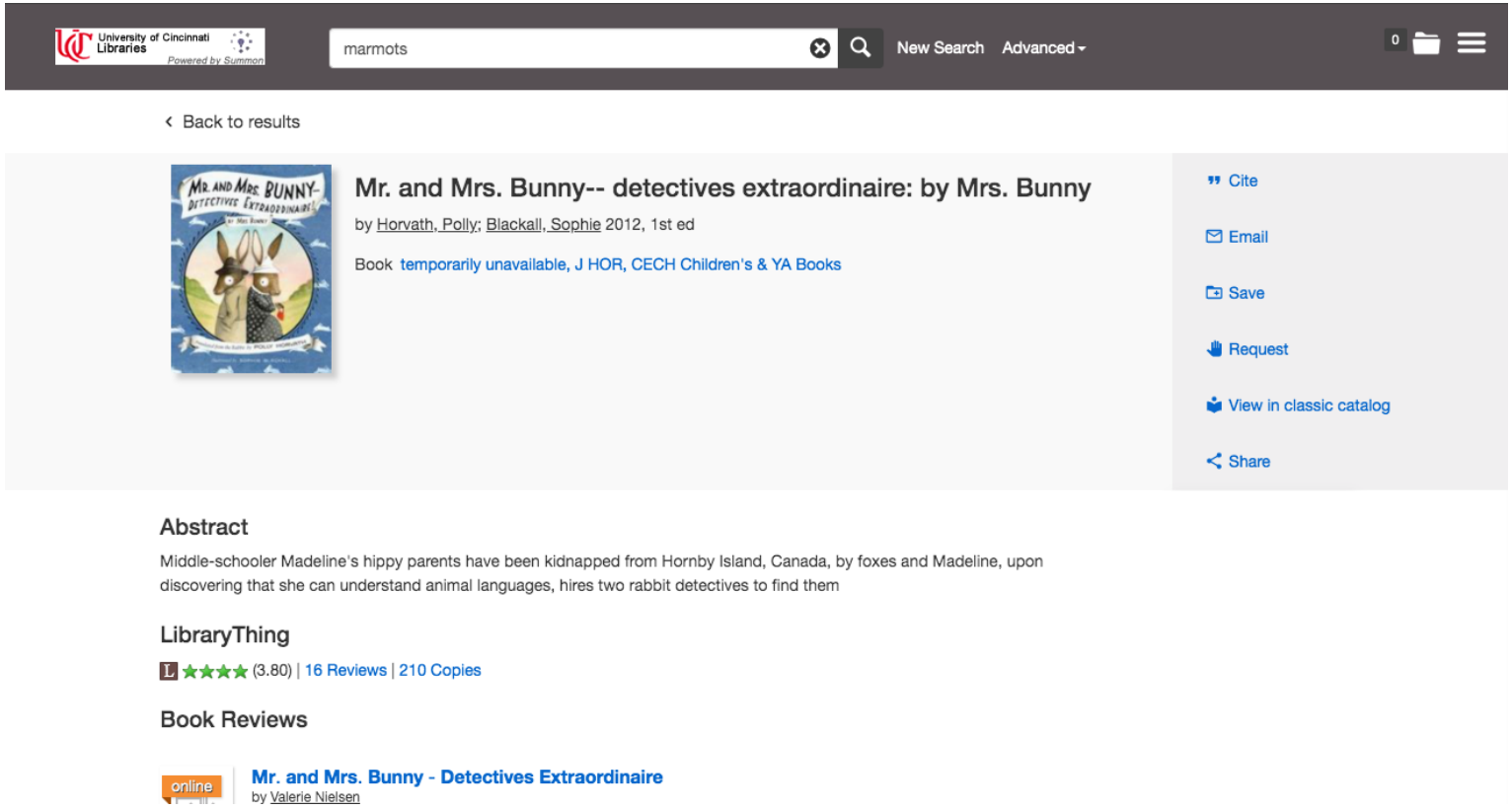
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Updated UI

- Detail page will also be landing page from search engine
- Needs to invite user to look around, discover more
- Provide detailed overview of the resource
- Engage user to take actions
  - Cite
  - Email
  - Save
  - Request
  - Share (twitter / Facebook / WhatsApp / Evernote / and more)
  - View in classic catalog

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Updated UI



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WhatsApp Integration

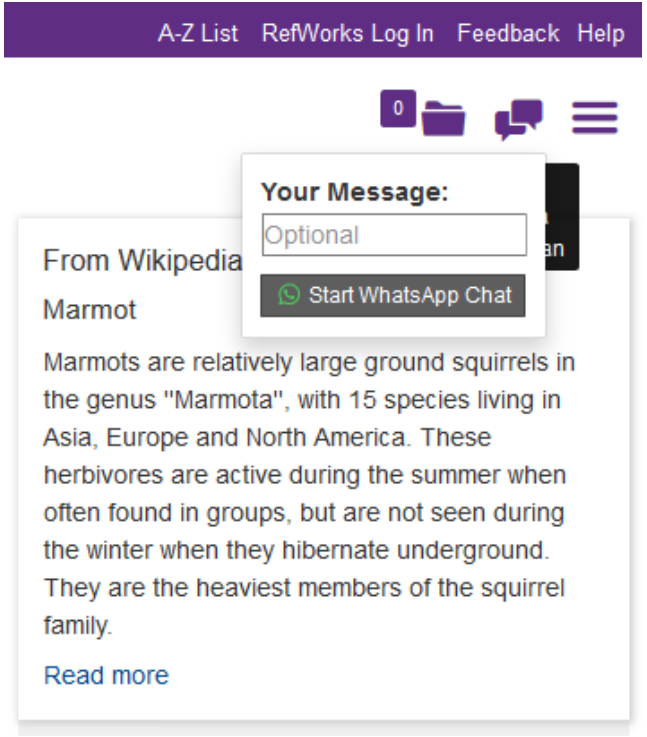
USER EXPERIENCE

Customer Value

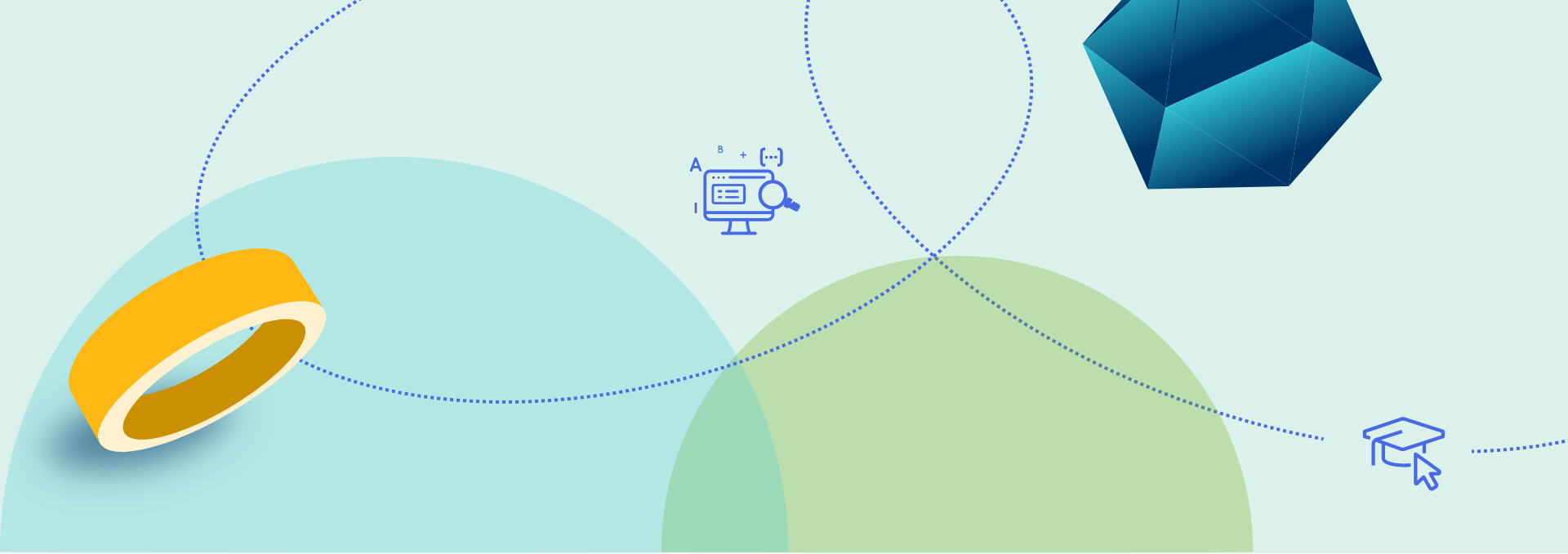
- Use WhatsApp for chat with patrons for real-time assistance regardless of where they are accessing your content from

Feature Highlights

- Simple integration allows for user to launch WhatsApp chat widget using WhatsApp API



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August Release

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Add Section number to Course ID in Course Reserves page

NERS

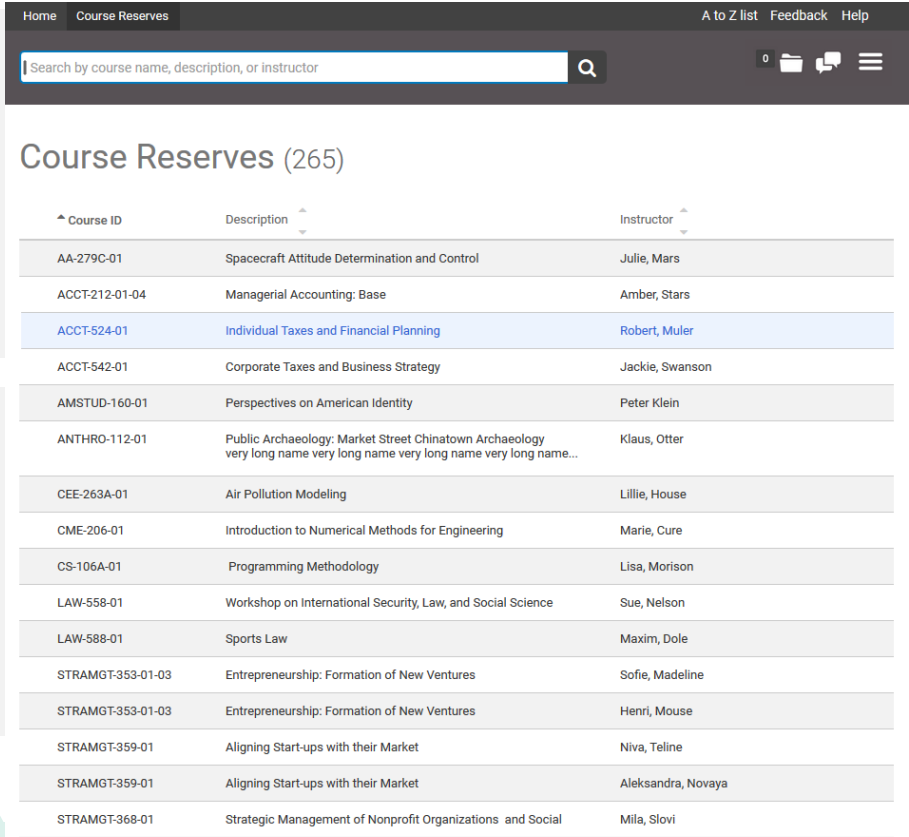
USER EXPERIENCE

Customer Value

- Simplify finding course materials by including section numbers with Course ID

Feature Highlights

- Display of multiple Section Numbers with each result in the Course Reserves page



Course ID	Description	Instructor
AA-279C-01	Spacecraft Attitude Determination and Control	Julie, Mars
ACCT-212-01-04	Managerial Accounting: Base	Amber, Stars
ACCT-524-01	Individual Taxes and Financial Planning	Robert, Muler
ACCT-542-01	Corporate Taxes and Business Strategy	Jackie, Swanson
AMSTUD-160-01	Perspectives on American Identity	Peter Klein
ANTHRO-112-01	Public Archaeology: Market Street Chinatown Archaeology very long name very long name very long name very long name...	Klaus, Otter
CEE-263A-01	Air Pollution Modeling	Lillie, House
CME-206-01	Introduction to Numerical Methods for Engineering	Marie, Cure
CS-106A-01	Programming Methodology	Lisa, Morison
LAW-558-01	Workshop on International Security, Law, and Social Science	Sue, Nelson
LAW-588-01	Sports Law	Maxim, Dole
STRAMGT-353-01-03	Entrepreneurship: Formation of New Ventures	Sofie, Madeline
STRAMGT-353-01-03	Entrepreneurship: Formation of New Ventures	Henri, Mouse
STRAMGT-359-01	Aligning Start-ups with their Market	Niva, Teline
STRAMGT-359-01	Aligning Start-ups with their Market	Aleksandra, Novaya
STRAMGT-368-01	Strategic Management of Nonprofit Organizations and Social	Mila, Slovi

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Consistent Link Back to Search Results

USER EXPERIENCE

NERS



Customer Value

- Create consistent navigation experience for patrons



Feature Highlights

- Make return paths from advanced search, the saved folders and other elements consistent

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Improve peer-review labeling

USER EXPERIENCE

NERS



Customer Value

- Quickly identify peer-reviewed content within Summon results.



Feature Highlights

- Clearly label peer-reviewed content
- Functionality in addition to peer review facet

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Display books and ebooks edition and publication year

NERS

USER EXPERIENCE



Customer Value

- Easily identify difference between editions of books and ebooks



Feature Highlights

- Reduce appearance of duplicates by clearly labeling editions
- Increase usefulness of metadata displayed

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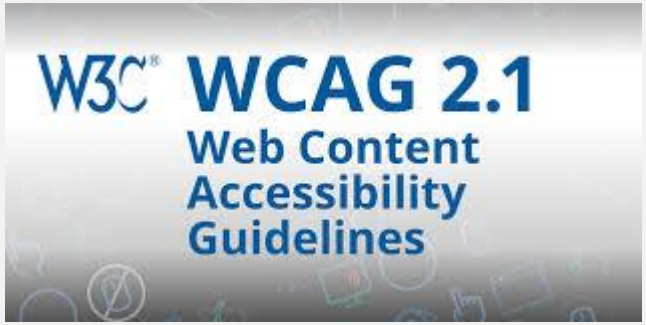
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Accessibility improvements for WCAG compliance

USER EXPERIENCE

Customer Value

- Ensure important content is accessible to all patrons



Feature Highlights

- Complete review of Summon User Interface for compliance to accessibility guidelines
- Improvements based on internal and external evaluation and input

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November Release

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Clarify author and editor in results and citations

USER EXPERIENCE

NERS



Customer Value

- Better visual treatment of author and editor in results and citations



Feature Highlights

- Distinguish between author and editor in brief preview in results

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Databases A-Z List within Summon

NERS

SEARCH AND EXPLORING



Customer Value

- Expose all resources they have access to for the end patron



Feature Highlights

- Provide pathway to discovery A to Z list of all databases

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Mechanism for Best Bets to 'harvest' LibAnswers FAQs

OPEN SYSTEM

NERS



Customer Value

- Easily find and implement new FAQs quickly using existing systems



Feature Highlights

- Use LibAnswers API to harvest LibAnswers to include in Best Bets
- Generate keywords using the metadata from LibAnswers

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Persistent Search Refinements

NERS

SEARCH AND EXPLORING



Customer Value

- Allows for moving dynamically between basic and advanced search, bringing any refinements along with each search



Feature Highlights

- Consistency in application of facets and inputs across basic and advanced searches
- Retention of search parameters as the user moves between search screens

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Sierra Integration (Initial Phase)

OPEN SYSTEM



Customer Value

- Better integration of library systems and Summon



Feature Highlights

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

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Additional NERS Feature: Analysis for SAML/federated/"Shibboleth" login option

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Analysis for SAML / federated / "Shibboleth" login option

NERS

LIBRARY EMPOWERMENT



Customer Value

- Saved searches is currently supported via MS OneDrive or Google Drive
- Desire for SAML-based, federated authentication option for this feature and others



Feature Highlights

- Analysis to determine best path forward for supporting improved integration
- Will take into consideration options for login to support Saved Searches, better integration with library services, and other opportunities

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Analysis for SAML / federated / "Shibboleth" login option

- Research outputs will include:
  - Initial analysis and planning
  - Outreach to Summon community to determine needs and priorities
  - Recommendation for development of functionality and project milestones / phases

- Timing for delivery of any functionality to be determined based on inputs from analysis

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Additional Items for Consideration

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Additional features under review

- CDI improvements continue
- Provide the ability to separate books and ebooks when searching
  - Merged records / possible duplication issues complicate this feature
  - Reviewing possible solutions and will make a recommendation
- Selective match and merge alternatives
  - Reviewing best ways to ensure problematic metadata does not display
- Possible impacts to display:
  - Display all 5xx note fields as the default in Summon
  - Improve Topic Explorer on smaller screens
  - Improve DB Recommender activation process, ranking and curation of sources

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Idea Exchange

- Updating Idea Exchange in the next week to reflect roadmap
  - Any committed votes for planned features will be available for voting on new features
- Top Idea Exchange items will be candidates for the NERS voting cycle for 2021
  - Go create new items or vote on the existing ones!



https://ideas.exlibrisgroup.com

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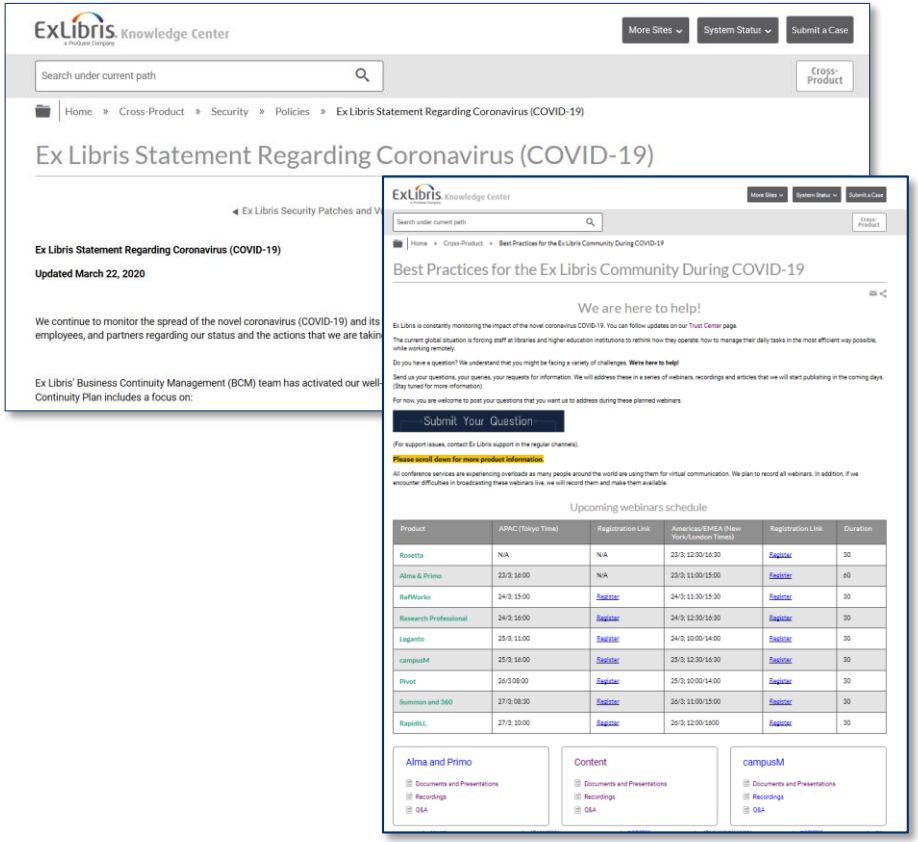
Key Ex Libris COVID-19 Related Resources

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Key Ex Libris COVID-19 Related Resources

- Ex Libris Trust Center
  - Ex Libris Statement Regarding Coronavirus (COVID-19)
- Best Practices for the Ex Libris Community During COVID-19



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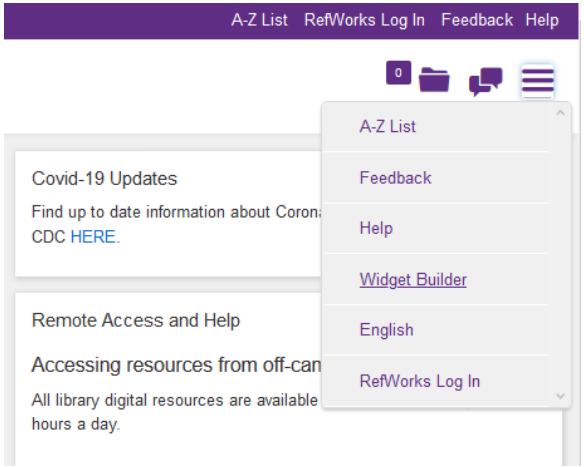
How do I direct my patrons to search electronic materials by default in Summon?

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Answer

- Use the Widget Builder to create a search box limited to Full Text Online
  - Go to the Widget Builder under the hamburger menu in the upper righthand corner of the result page
  - Follow the steps and select Full Text Only under Refine Your Search in the Facet Pane
  - Use the code generated by this process and replace any existing search boxes on your site
  - Users can easily clear this facet if they want to see physical items as well



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Additional Tips / Best Practices

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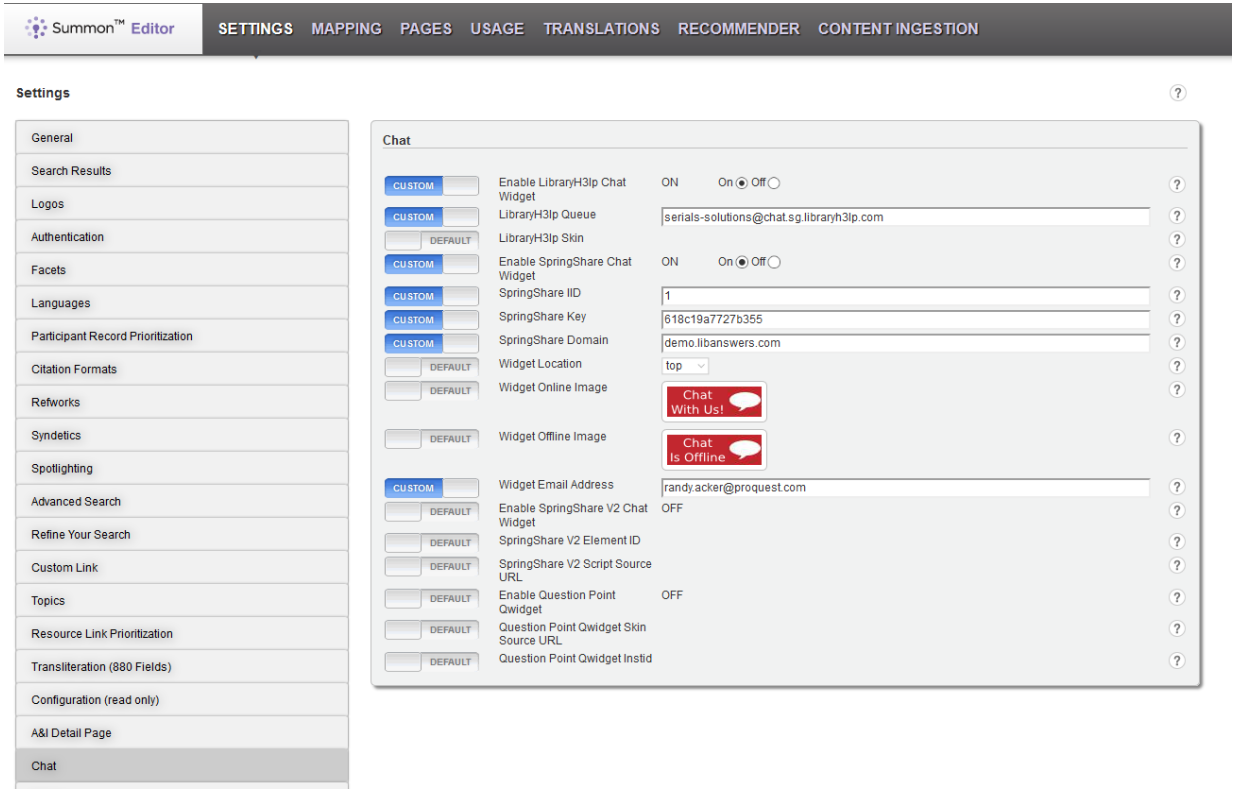
Summon Tips Resources

- Access
  - Summon: Authentication Banner for Remote Users
  - Summon: Remote Authentication Methods
  - Authentication in Summon Training Video
  - Configuring the Authentication Banner
- Communication/Engagement
  - Custom Panel Configuration
  - What kinds of things can a library put in Summon Custom Panels?
  - Configuring Chat Widgets
- Integration
  - Search Boxes and Search Widgets
  - Create a Search Box

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Chat in Summon

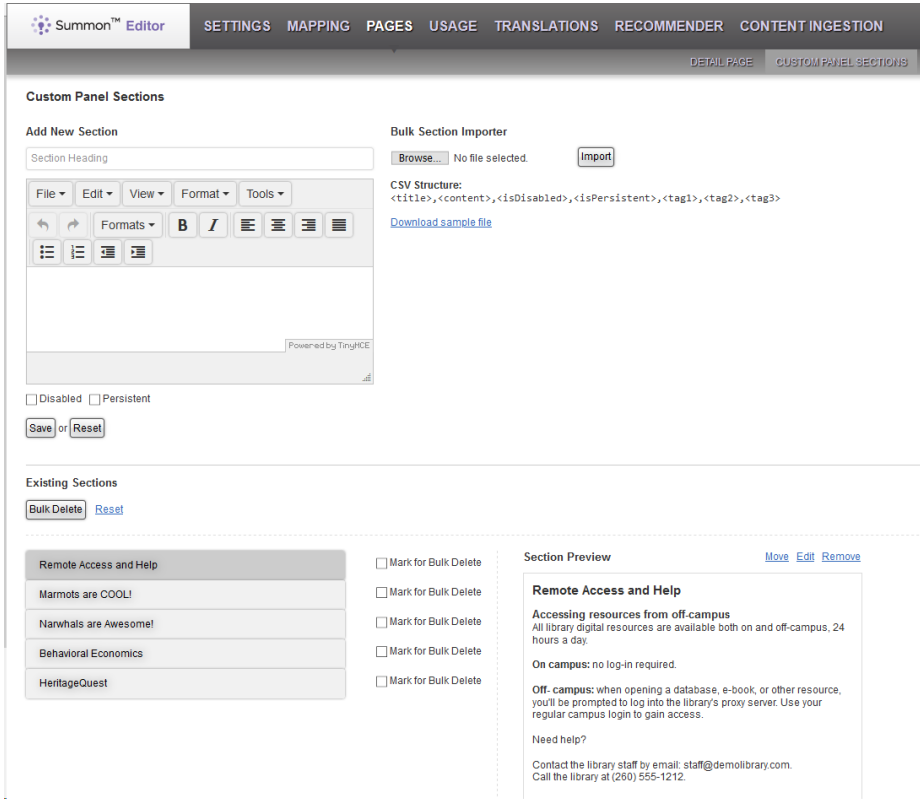
- Remember you can include chat on Summon results pages
- Configuration can be found in the Admin Console under Settings > Chat



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Custom Panels

- You can provide critical information and updates via Custom Panels.
- You'll find the settings in the Admin Console under Pages > Custom Panel Sections.
- Be sure to check the Persistent box at the bottom of the form to ensure the panel appears on the Summonresults page at all times.



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Custom Panels on Mobile

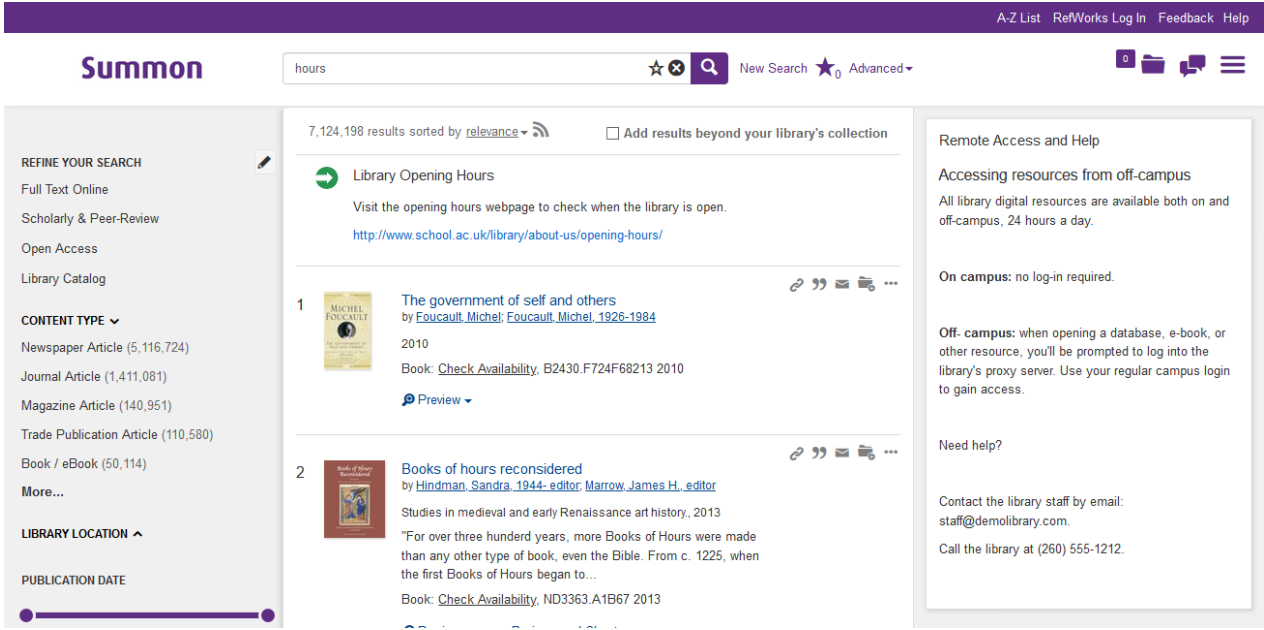
- Custom Panels do not show up on mobile devices by default
  - With more individuals accessing materials remotely, you may see an increase of mobile usage

- To make Custom Panels show up on mobile devices, follow the instructions on the Knowledge Center titled "What kinds of things can a library put in Summon Custom Panels? "
  - Instructions and code you can copy and paste can be found in the section "Display Custom Panels on Mobile Summon Site"

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Database Recommender and Best Bets

- Database Recommender and Best Bets are also good ways to highlight online content and other resources or provide inline help.
  - Both are tag based, so they will only appear when the tags are searched
  - You can activate resources and edit, add or remove tags in the Recommender Section of the Admin Console



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Summon Customer Survey - Interface Configurations and API

- A joint survey with the Summon Product Working Group
- We hope to learn more about how you:
  - Customize the Summon user interface
  - Integrate services with Summon
  - Leverage the Summon API

https://www.surveymonkey.com/r/Summon2020-Interface-API

Open through May 23, 2020

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Thank you!

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