

Updated Summon Features and Functionality Refresher

Heidi Thompson, MLIS
Customer Success Manager
Ex Libris, a ProQuest Company

ExLibris a ProQuest Company
Summon



- Introduction to Customer Success
- Print and eBook filter
- Unpaywall PDF links
- Proxy DOI
- Springshare integrations
  - Harvesting LibAnswers into Best Bets
  - Harvesting A-Z Database list
- Best Practice documentation

Ex Libris
Summon

About Ex Libris Customer Success

Our team is here to help you:

- Understand the products
- Know how to make them work for your local needs
- Enjoy working with them and with Ex Libris

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



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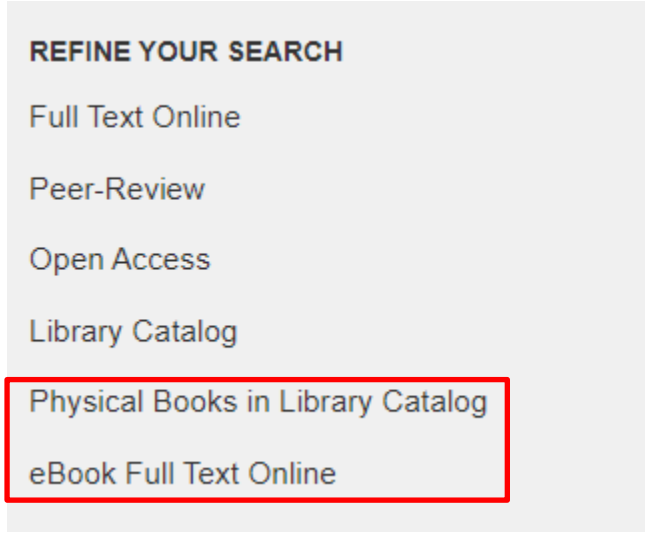
Print and eBook Filter

- Feature released in August 2021
- Activation of this new refinement is a two-step process
  - In the Summon Admin Console, under the Settings click on “Refine your Search” on the left and then:
    1. Physical Books - Backend Processing – Turn this ON (It will take about a week for the process to run against your catalog records and populate the filter)
    2. Physical Books Filter Enabled – Turn this ON after about a week to ensure that there are items available to filter using the facets in the results page UI. You can test this in Preview before activating in your live environment to ensure that the backend process has completed.

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Print and eBook Filter

Print/eBook filters activated in the Summon UI:



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Unpaywall PDFs

- Feature released Nov 2019
- Added links directly to PDF for articles with corresponding content available on the Unpaywall platform
  - You can activate this feature under Settings and then click on Search Results from the left-hand options
  - We will be making updates to this feature in the future to help integrate it better with the Open Access filter

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Unpaywall PDFs

- The default label for this link is “PDF” but you can update this using the Translations page in the Summon Admin Console



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Proxy DOI

- Feature released May 2021
- Apply EZProxy to the DOI in Preview Pane
  - This feature applies your proxy settings to the DOI link in the preview pane in Summon search results
  - You can activate this feature in the Summon Admin Console under Settings, and then select Search Results from the left-hand options



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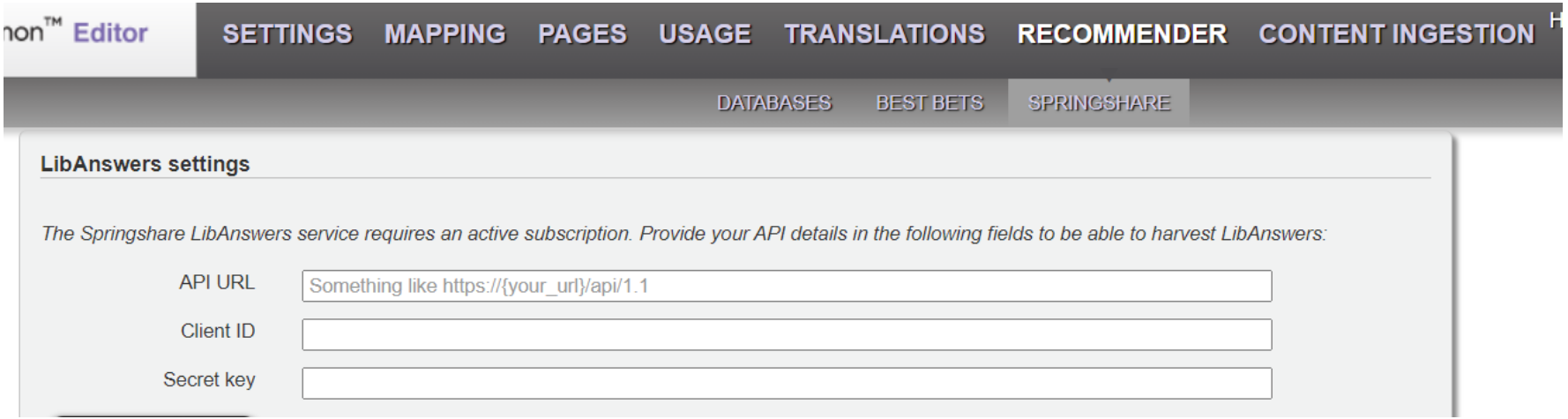
SpringShare Integrations: Lib Answers

- Feature released December 2020
- This integration harvests your LibAnswer FAQs into the Best Bets feature on the Summon results page. This reduces the work you have when creating Best Bets.
  - Video on feature and how to activate

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SpringShare Integrations: Lib Answers

- Activate this feature in the Summon Admin Console. Select “Recommender” from the top of the page, and then select “Springshare” from the options beneath the word “recommender.” Enter in the details on the form under “LibAnswers Settings”



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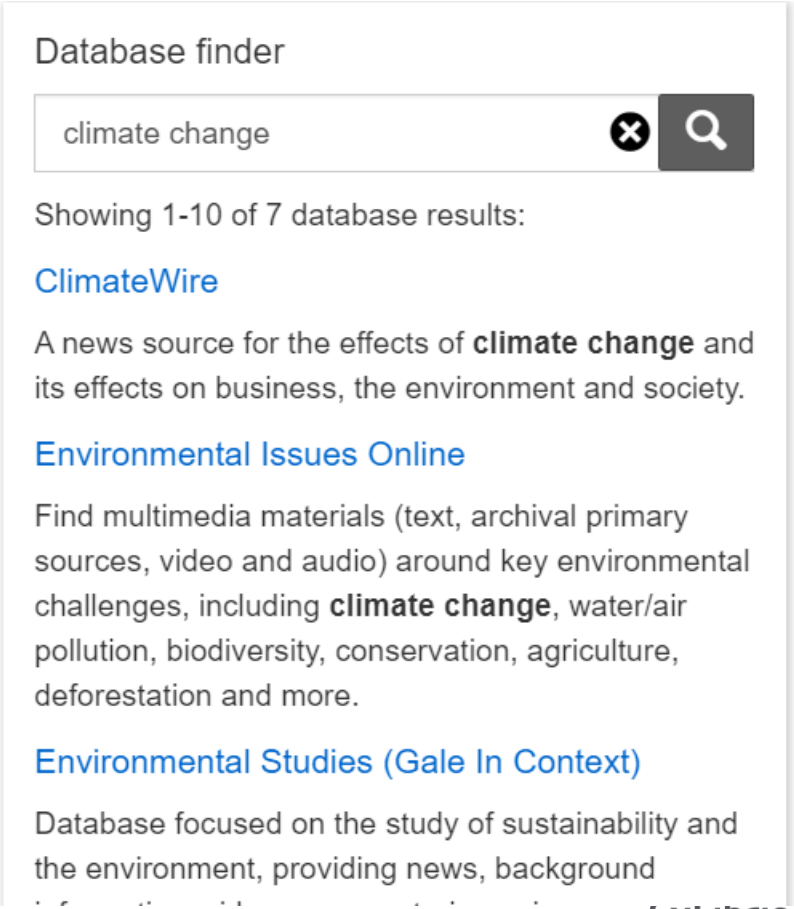
SpringShare Integrations: A-Z Database List

- Feature released December 2020
- This integration adds a search box in the right-hand pane on the Summon results page that allows users to search through your SpringShare A-Z Database list.
  - Video on feature and how to activate

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SpringShare Integrations: A-Z Database List

- Activate this feature in the Summon Admin Console.
- Select “Recommender” from the top of the page, and then select “Springshare” from the options beneath the word “recommender.”
- Enter in the details on the form under “A-Z Database settings”



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Summon Release Notes in the KnowledgeCenter

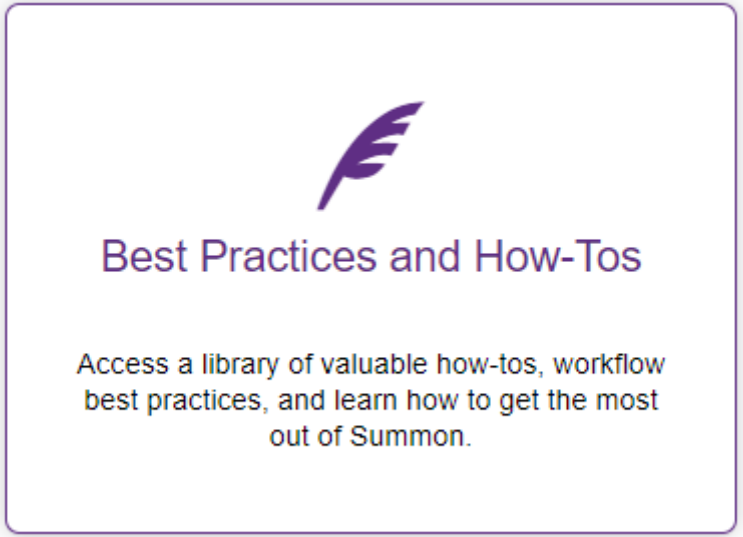
- You can find information about all of these features in the KnowledgeCenter:
  - Summon Release Notes

- Sign up for Brent's November 11th webinar (What's New with Summon) where he will discuss the new Summon UI and other new features which will be released in December:
  - Register for webinar and view previous recordings

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New Best Practice Toolkits

- Knowledge Center > Summon > Best Practices and How-Tos > English



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New Best Practice Toolkits, cont'd

- We have redesigned the toolkit area into 2 concentrations:
  - Discovery Optimization and Library Recommendations
    - Best Practice Toolkit for Encouraging Searching in Summon
    - Data Optimization Best Practice Toolkit
    - Discovery Curriculum for Patron-Facing Librarians
    - Making the most of the Summon Preview Environment
    - Summon Linking
    - Summon Search Exercise
    - Using Summon Analytics to Make Strategic Decisions
  - Teaching Summon to Your Patrons
    - Summon User Interface Feature Descriptions for Patrons
    - Teaching Summon to Patrons and Students: Classroom Activities

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Thank You!

Heidi.Thompson@exlibrisgroup.com

CustomerSuccess@exlibrisgroup.com