What's New with Summon

April 2021



Ex Libris
a ProQuest Company

What’s New For Summon





Brent D. Cook
Director, Product Management
Summon

© 2021 Ex Libris | Confidential & Proprietary

ExLibris
a ProQuest Company



- Review accomplishments
  - New Summon Functionality
- A look ahead
  - 360/Intota May Release
  - Summon May Release
  - Summon Roadmap
- Questions?



Recent Summon Improvements

© 2021 Ex Libris | Confidential & Proprietary

ExLibris
a ProQuest Company

Roadmap Areas and Highlights



SEARCH AND EXPLORING



OPEN SYSTEM



USER EXPERIENCE



LIBRARY EMPOWERMENT



CENTRAL DISCOVERY INDEX



ANALYTICS



ACCESSIBILITY



CONSORTIA

© 2021 Ex Libris | Confidential & Proprietary

Databases A-Z List within Summon

NERS

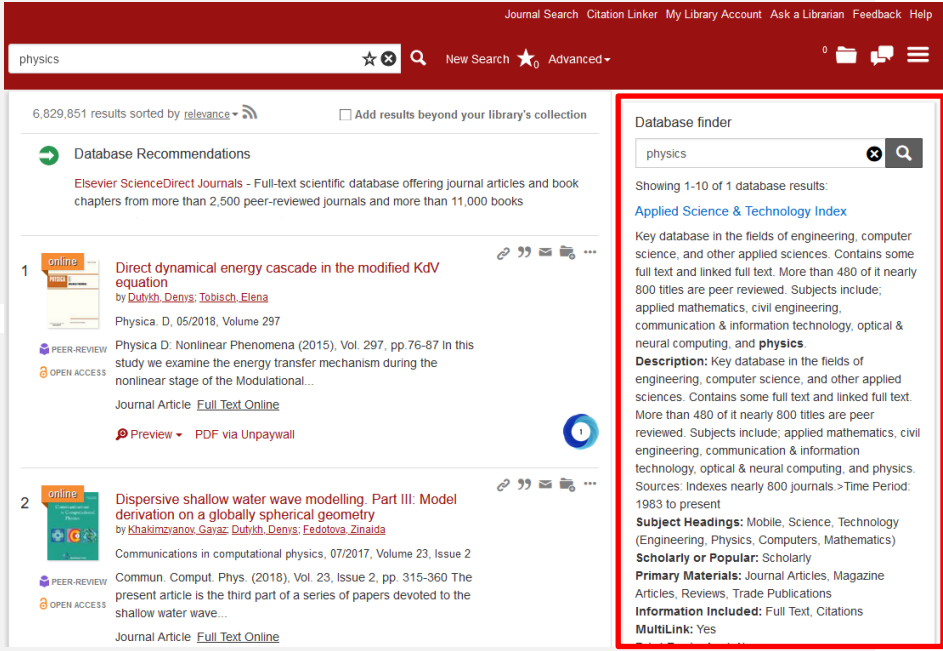
SEARCH AND EXPLORING

Customer Value

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

Feature Highlights

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



© 2021 Ex Libris | Confidential & Proprietary

Ex Libris a ProQuest Company

Mechanism for Best Bets to 'harvest' LibAnswers FAQs

OPEN SYSTEM

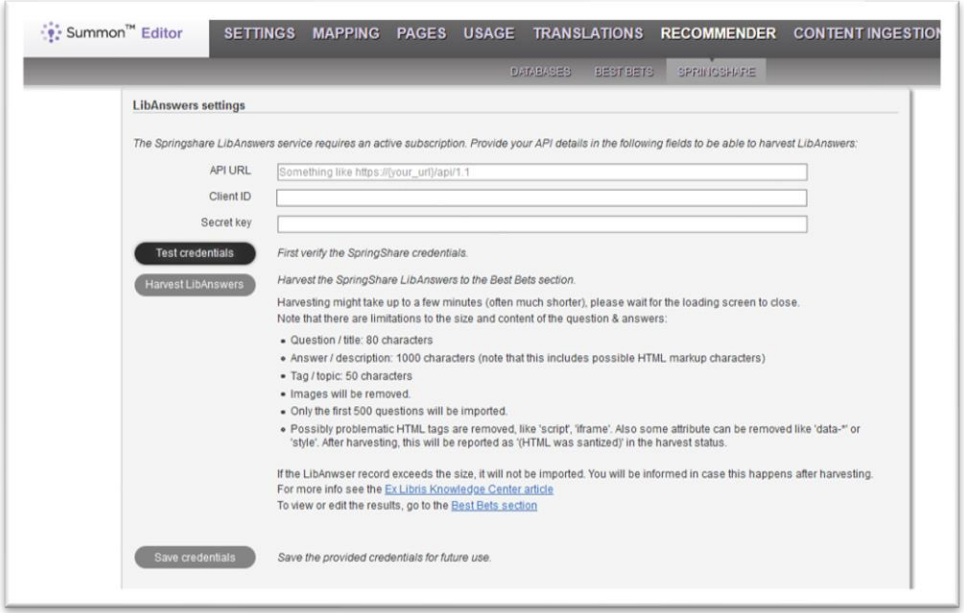
NERS

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



© 2021 Ex Libris | Confidential & Proprietary

Update APA citation style to 7th Edition

LIBRARY EMPOWERMENT

What's Coming:

Support for APA citation style (7th Edition)



Highlights:

- Ability for users to save or export items in APA 7th Edition Format
- Accessible via the Saved Items folder or using the citation icon in the brief results

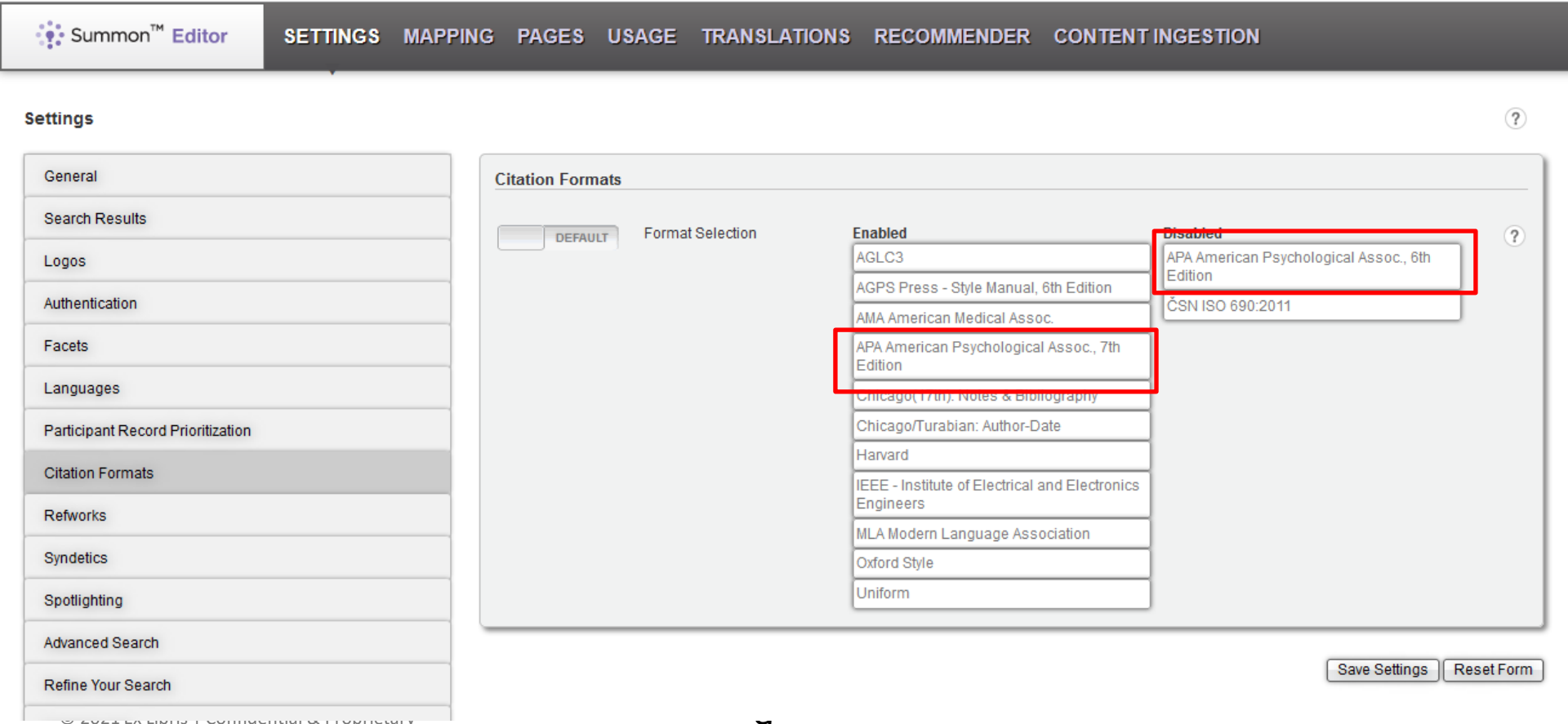
Better alignment with current citation formats

Released: February 2021

© 2021 Ex Libris | Confidential & Proprietary

Ex Libris a ProQuest Company

Includes 6th and 7th Edition





360 & Intota Services

May 12, 2021 Release Details

© 2021 Ex Libris | Confidential & Proprietary

Ex Libris
a ProQuest Company

Q2 Overview

- New video template for 360 MARC Updates
- Web Content Accessibility Guidelines (WCAG) Level A compliance
- 360 Holdings API performance testing
- COUNTER r5 provider-specific handling



© 2021 Ex Libris | Confidential & Proprietary

Video MARC Template

- Worked with Metadata Librarians to develop a solid video resource template

```
=336  \\$atwo-dimensional moving image$btdi$2rdacontent
=337  \\$acomputer$bc$2rdamedia
=337  \\$avideo$bv$2rdamedia
=338  \\$aonline resource$bcr$2rdacarrier
=347  \\$avideo file$2rda
```

- Next steps
  - Engage early testers to evaluate the template, gauge how much customization is desired and/or required
  - General rollout planning in process, will also factor in early testing feedback

© 2021 Ex Libris | Confidential & Proprietary

WCAG Level A Compliance for 360 Core

360 Core Client Center
Logo, radio buttons, and some search controls are missing labels.
Table filtering & controls not properly identified as groups and labeled
OA: Select Databases To Analyze > Edit Default List > Default status list is not editable with keyboard only. It only supports drag and drop
After applying filters to data, focus is placed at the top of the screen.
Some links' purpose not properly labelled
Errors not properly explained in several Data Management contexts
Database Details Edit and Provider Details Edit screens have unlabeled controls

© 2021 Ex Libris | Confidential & Proprietary

360 Holdings API

- Making progress to make the full export quicker
- Adding infrastructure to support delta exports
- Next steps:
  - Release improvements to early testing partner
  - Integrate into Developer Network framework



© 2021 Ex Libris | Confidential & Proprietary

R5 Reports

Out of the Box

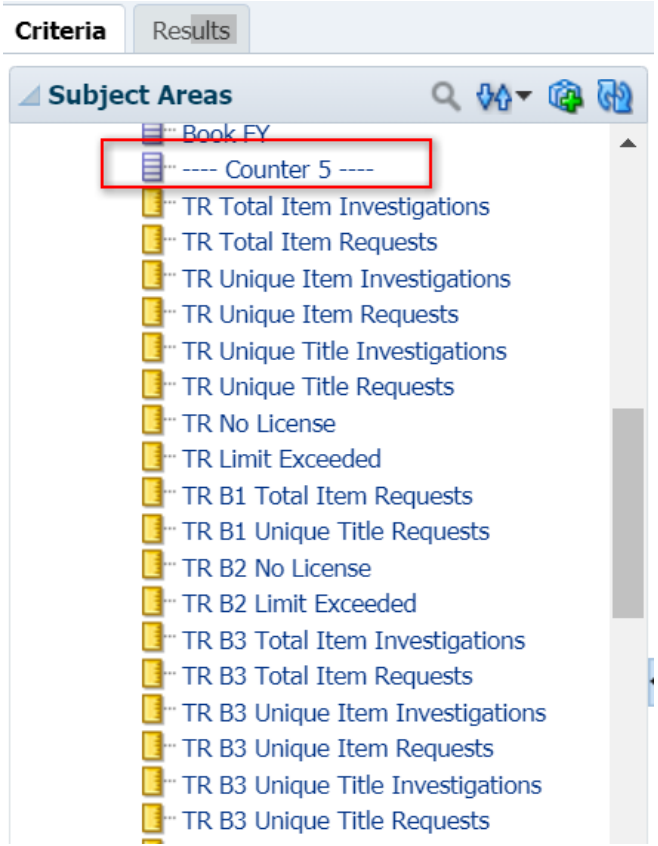
360 COUNTER Reports (R5)

Books
- Book Requests and Costs
- Book Access Denied
- Book Master Report

Journals
- Journal Requests and Costs
- Journal Access Denied
- Journal Master Report

Databases
- Database Requests and Costs
- Database Access Denied
- Database Master Report

Custom Reports



© 2021 Ex Libris | Confidential & Proprietary

COUNTER r5

- Alexander Street Press COUNTER r5 reports in error
- American Mathematical Society COUNTER R5 report in error
- American Medical Association COUNTER R5 report in error
- American Physical Society COUNTER R5 reports in error
- Cambridge University Press COUNTER R5 report in error
- Counter r5 - EBSCO Master Report uploads have additional errors
- COUNTER r5 - Publisher is required report Item - error for multiple providers
- Credo Reference COUNTER r5 reports in error
- CSIRO Publishing COUNTER R5 report in error
- EBSCOhost COUNTER r5 reports in error
- Emerald COUNTER r5 reports in error
- InfoBase COUNTER r5 reports in error
- Ingenta COUNTER r5 reports in error
- JSTOR COUNTER r5 reports in error
- Optical Society of America COUNTER r5 reports in error
- Project MUSE COUNTER r5 reports in error
- ProQuest COUNTER r5 reports in error
- Sage COUNTER r5 reports in error
- SPIE COUNTER r5 reports in error; PR_P1 inconsistently in error

© 2021 Ex Libris | Confidential & Proprietary

- SUSHI r5 test errors for Brill - "Client has made too many requests" and "Simultaneous requests are not supported."



Summon May Release

May 12

Preview beginning April 28th

© 2021 Ex Libris | Confidential & Proprietary

Ex Libris
a ProQuest Company

Summon Roadmap Highlights

February Release

February 3rd

Update APA citation style to 7th Edition

Continued work on Sierra via Summon—Early Adopter Access

May Release

May 12th

Separate Print from Ebooks when Searching

NERS

Apply EZProxy to DOI in Preview Pane

NERS

Improvements on Topic Source Display

More convenience to access full text: Direct links to PDF (July Early Access)

© 2021 Ex Libris | Confidential & Proprietary

Separate Print from eBooks when Searching

SEARCH AND EXPLORING

NERS

What's Coming:

Two additional facets—One for print and one for ebooks



Highlights:

- Current facet combines print and ebooks; new facets will focus on each format alone
- Ability to include or exclude
- Configurable by institution

Provides the user with the best controls for refining their search results

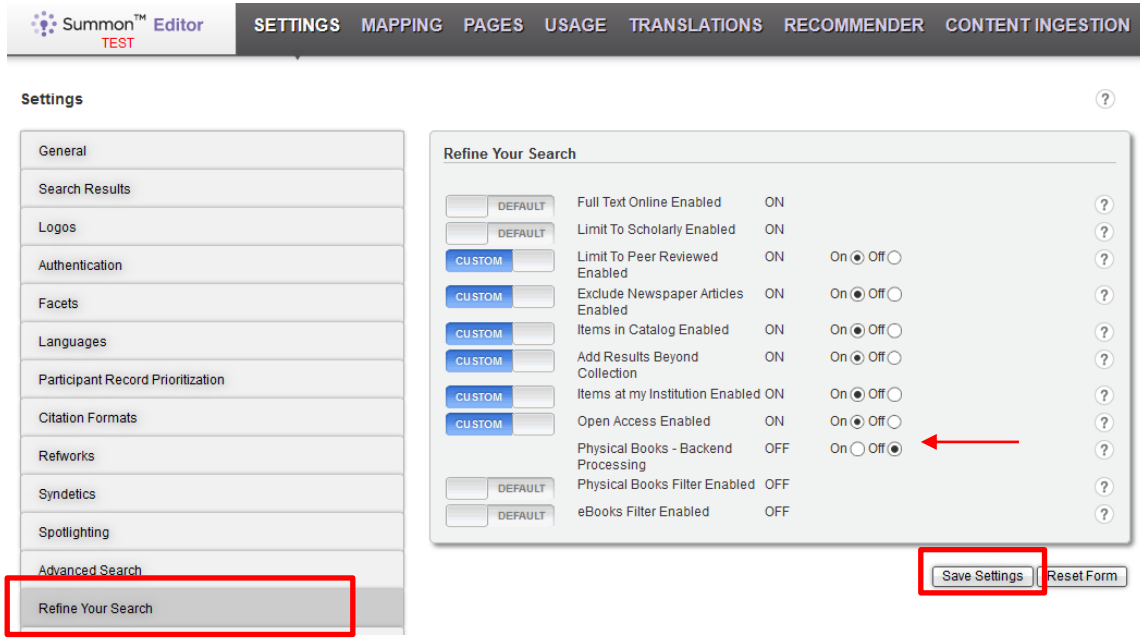
Release planned: May 2021

© 2021 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Separate Print from eBooks—Configuration

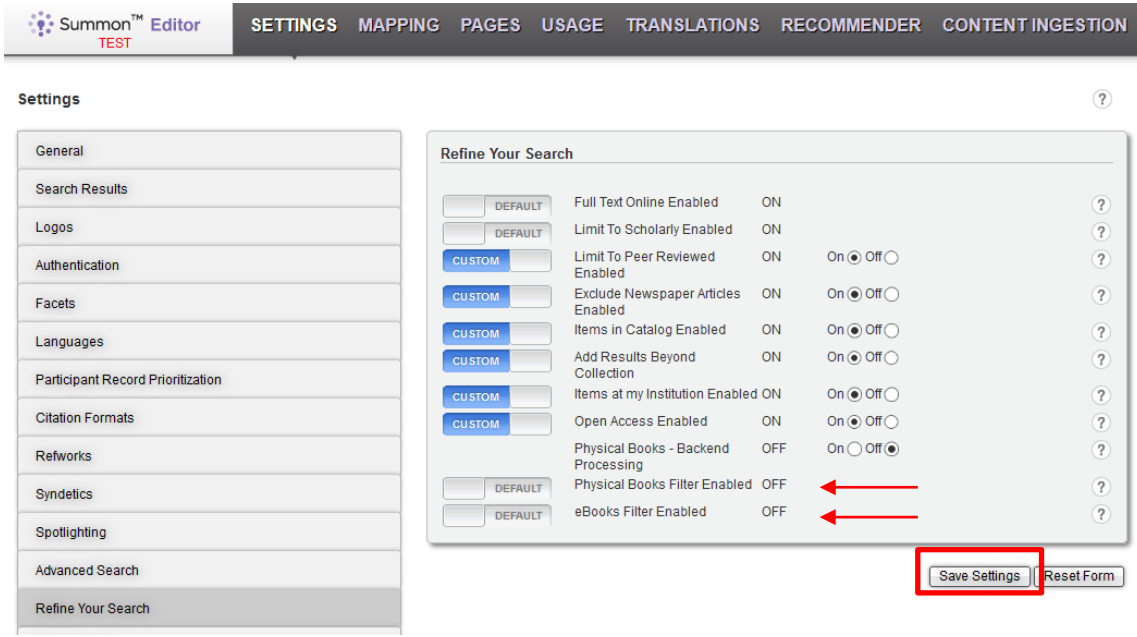
- Found under Settings > Refine Your Search
- First turn on “Physical Books – Backend Processing”
  - You’ll need to wait for an index update to be completed before the facet is ready
  - This process will not affect the existing Book/Ebook facet



© 2021 Ex Libris | Confidential & Proprietary

Separate Print from eBooks—Configuration

- Once an index process has been completed with the backend processing enabled you can turn on the facets
- For Print set “Physical Books Filter Enabled” to On
- For electronic books set “eBooks Filter Enabled” to On
    - Facets will appear within 5 minutes after enabled, or disappear if disabled



© 2021 Ex Libris | Confidential & Proprietary

Improvements on Topic Source Display

USER EXPERIENCE

What's Coming:

Improvement for which source name is used for topic display



Highlights:

- Alignment of source displayed for encyclopedia entry in Summon search results with the linked source

Provide better user experience

Release planned: May 2021

© 2021 Ex Libris | Confidential & Proprietary

Apply EZProxy to DOI in Preview Pane

OPEN SYSTEM

NERS

What's Coming:

The ability to add EZproxy to DOI field link



Highlights:

- Ability at add EZproxy to DOI URL
- Configurable by institution

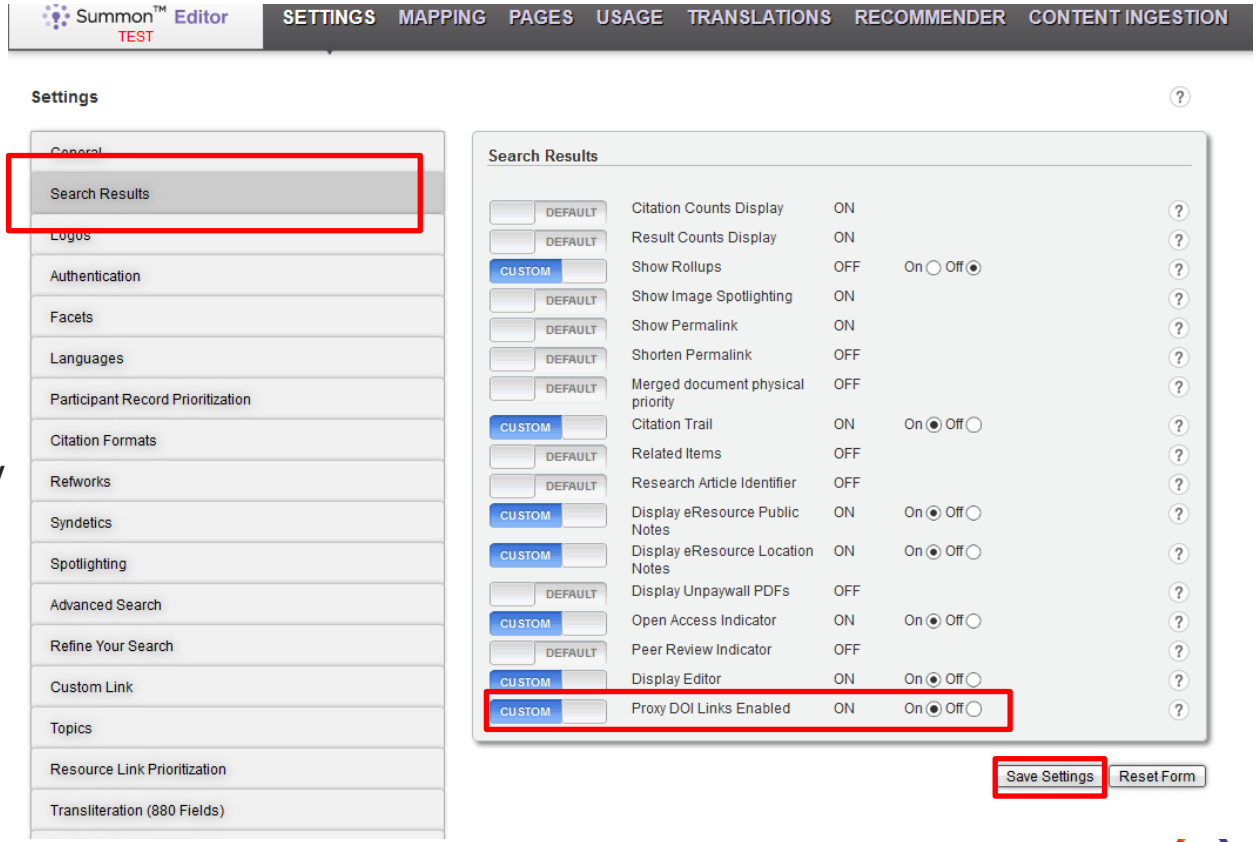
Making content more easily accessible

Release planned: May 2021

© 2021 Ex Libris | Confidential & Proprietary

Apply EZProxy to DOI Configuration

- Found under Settings > Search Results
- Switch Proxy DOI Links Enabled to “Custom” and “On”
- Click Save Settings and the change should be applied in approximately 5 minutes
- Your proxy settings used on your site will now be applied to the DOI link



© 2021 Ex Libris | Confidential & Proprietary

Sierra via Summon

OPEN SYSTEM

What's Coming:

Better integration of library systems and Summon



Highlights:

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

Stronger, unified discovery and management

Release planned: Early Adopter Access H1; General availability H2

© 2021 Ex Libris | Confidential & Proprietary

Institution profile required for Sierra via Summon

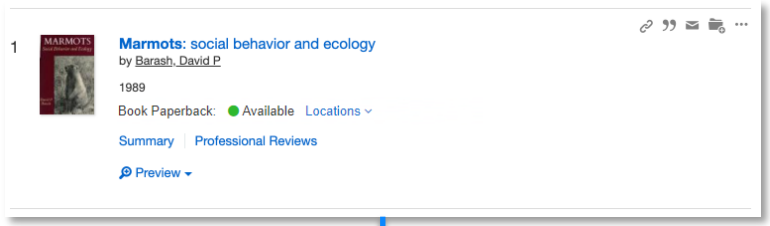


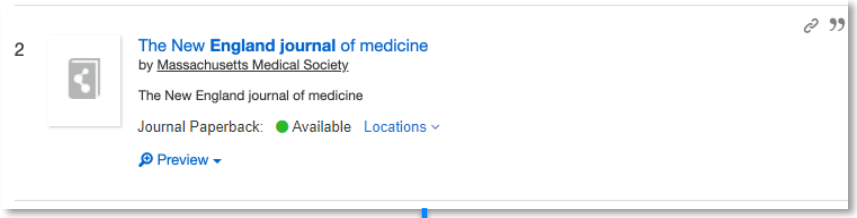
- You need to be using the Sierra REST API version 6.0 or higher, which is supported on Sierra 5.1 and higher
- CAS must be installed
  - SAML will be supported at a later date

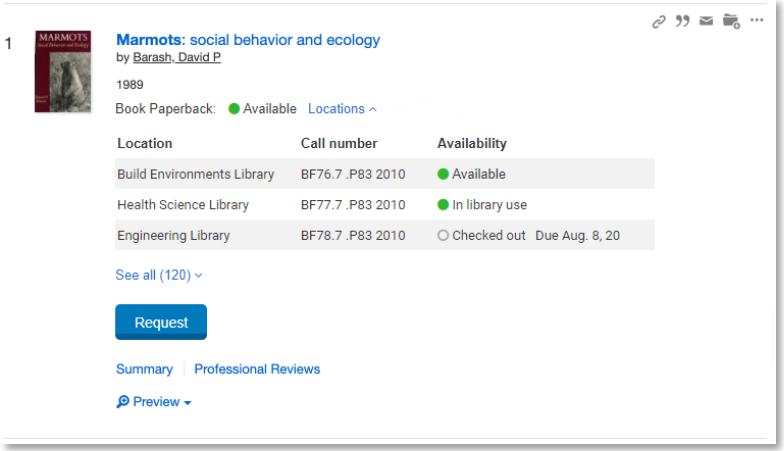
© 2021 Ex Libris | Confidential & Proprietary

ExLibris
a ProQuest Company

Availability and Items



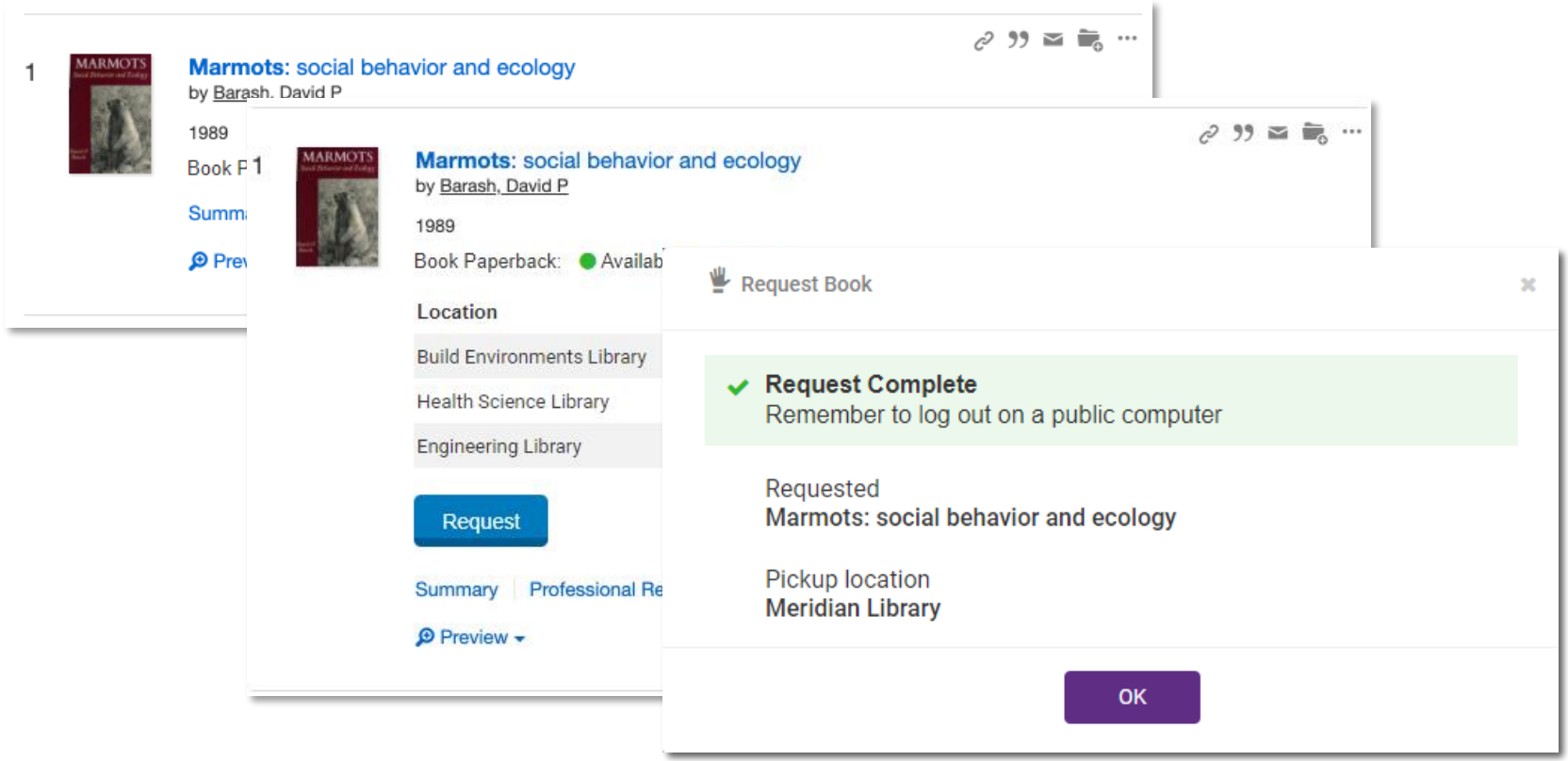






© 2021 Ex Libris | Confidential & Proprietary

Availability and Request – Solution Concept



© 2021 Ex Libris | Confidential & Proprietary



Summon Roadmap

© 2021 Ex Libris | Confidential & Proprietary

ExLibris
a ProQuest Company

Summon Roadmap Highlights

August Release

August 4th

- Continued work on Sierra via Summon—Early Adopter Access
- Short URL for Citations (NERS)
- Better Tag Matching for "Best Bets" (NERS)
- Central Discovery Index – Subject heading normalization
- More convenience to access full text: Direct links to PDF (October General Availability)

December Release

December 15th

- Summon User Interface Refresh
- Display All Links in Results (NERS)
- Improved Corrected Spelling (Did You Mean?) (NERS)
- Exact Search – Additional Fields (NERS)
- Improved Database Recommender Management Tools

© 2021 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company



August Quarterly Release

August 4th

Preview beginning July 21

© 2021 Ex Libris | Confidential & Proprietary

Ex Libris
a ProQuest Company

Sierra via Summon

OPEN SYSTEM

What's Coming:

Better integration of library systems and Summon



Highlights:

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

Stronger, unified discovery and management

Release planned: Early Adopter Access H1; General availability H2

© 2021 Ex Libris | Confidential & Proprietary

Short URLs for Citations

USER EXPERIENCE

NERS

What's Coming:

Short URL to replace long, encrypted URL currently used in citations



Highlights:

- Creation of a short URL management system for Summon
- Improvement for all citation styles

Provide better user experience and citation management

Release planned: August 2021

© 2021 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Better Tag Matching for “Best Bets”

SEARCH AND EXPLORING

NERS

What’s Coming:

Make Best Bets show up when tag keywords are present in search, not just when there’s an exact match



Highlights:

- Ability to match on tags when additional search terms are present
- Reduced need to create extensive tags to match potential user queries

Provides the user with guidance from the librarian right when they need it

Release planned: August 2021

© 2021 Ex Libris | Confidential & Proprietary

Direct links to PDF

USER EXPERIENCE

What's Coming:

More convenience to access full text



Highlights:

- Ability to prefer display of direct links to PDFs
- Configurable by institution

Provide better user experience and access to content

Release planned: Early access in July; general access in October

© 2021 Ex Libris | Confidential & Proprietary



December Quarterly Release

December 15

Preview beginning November 24

© 2021 Ex Libris | Confidential & Proprietary

Ex Libris
a ProQuest Company

Summon User Interface Refresh

USER EXPERIENCE

What's Coming:

Improvements to overall usability to existing Summon functionality



Highlights:

- Improve placement and usability of features on the results page
- Focus on improving facets, results short display and preview, and accessibility
- Will not be a new UI but may require updates to training materials

Release planned: December 2021 with extended preview

Ensure best user experience and easy access to all elements on the Search Results page

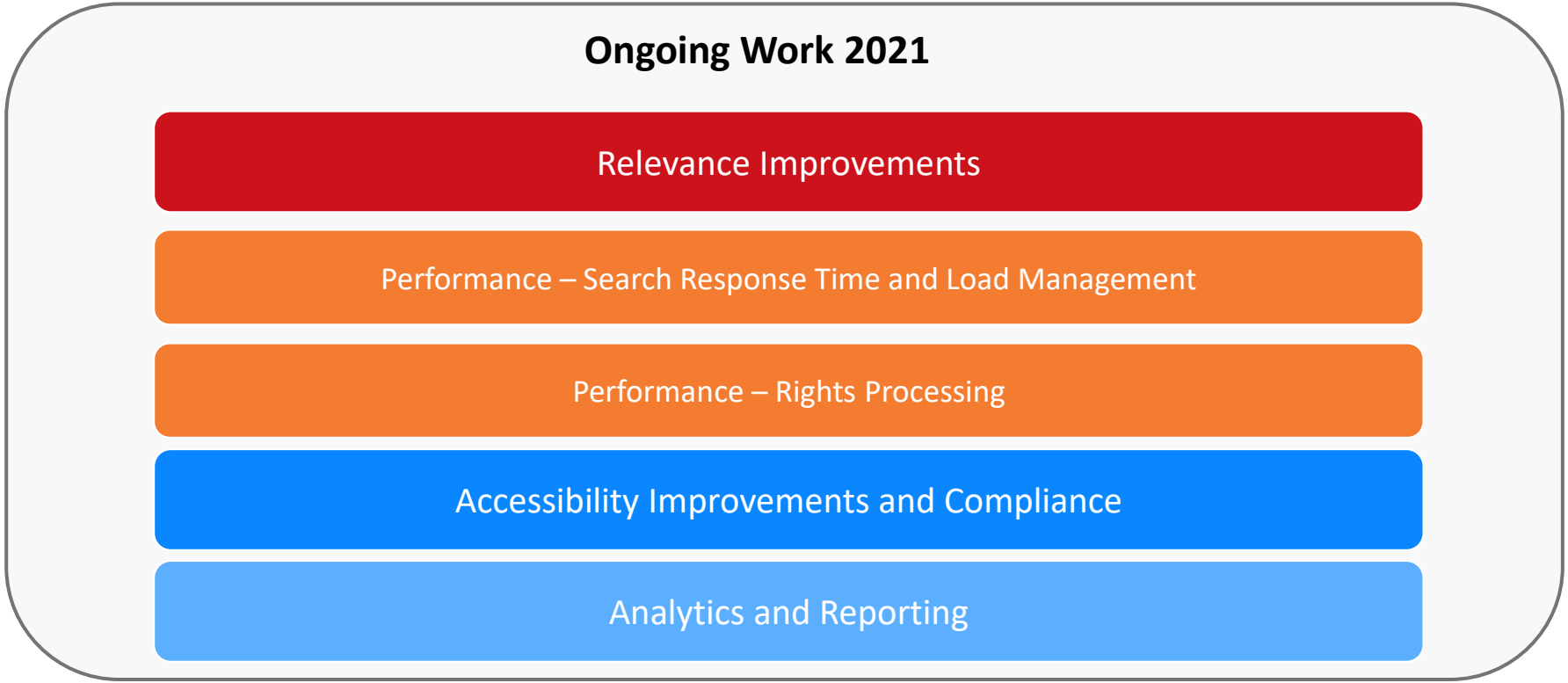
© 2021 Ex Libris | Confidential & Proprietary

Additional Functionality

- **Exact Search (Additional Fields):** Ability to select “exact match” on certain fields on the advanced search page; Possible fields include: Call Number, ISBN, ISSN, DOI, OCLC Number and Patent Number
- **Improved Corrected Spelling (Did You Mean?):** Automatic replacement of misspelled word with corrected spelling
- **Improved Database Recommender Management Tools:** Batch processing for DB Recommender changes
- **Display All Links in Results:** Enhance in Summon results page to display all full text links subscribed in the knowledgebase

© 2021 Ex Libris | Confidential & Proprietary

Summon Roadmap Highlights



© 2021 Ex Libris | Confidential & Proprietary



Additional Updates

© 2021 Ex Libris | Confidential & Proprietary

Reminder: Data Center Move: May 29 -30

- During the **memorial day** weekend with **up to 24 hours down time**
  - Migration done in phases to reduce risk
- **Impacted Services**
  - **Summon –** will be available for searching
    - Linking to resources through 360 will not be available
  - **360** – up to 24 hours outage, try to reduce as much as possible
    - Services: 360 Core/Client Center, 360 Link, E-journal Portal, 360 Search, Ulrichsweb, Intota
  - **CDI –** main service will not be impacted
    - Search updates will be stopped for up to a week
    - Rights update, up to 24 hours outage (no updates)



© 2021 Ex Libris | Confidential & Proprietary

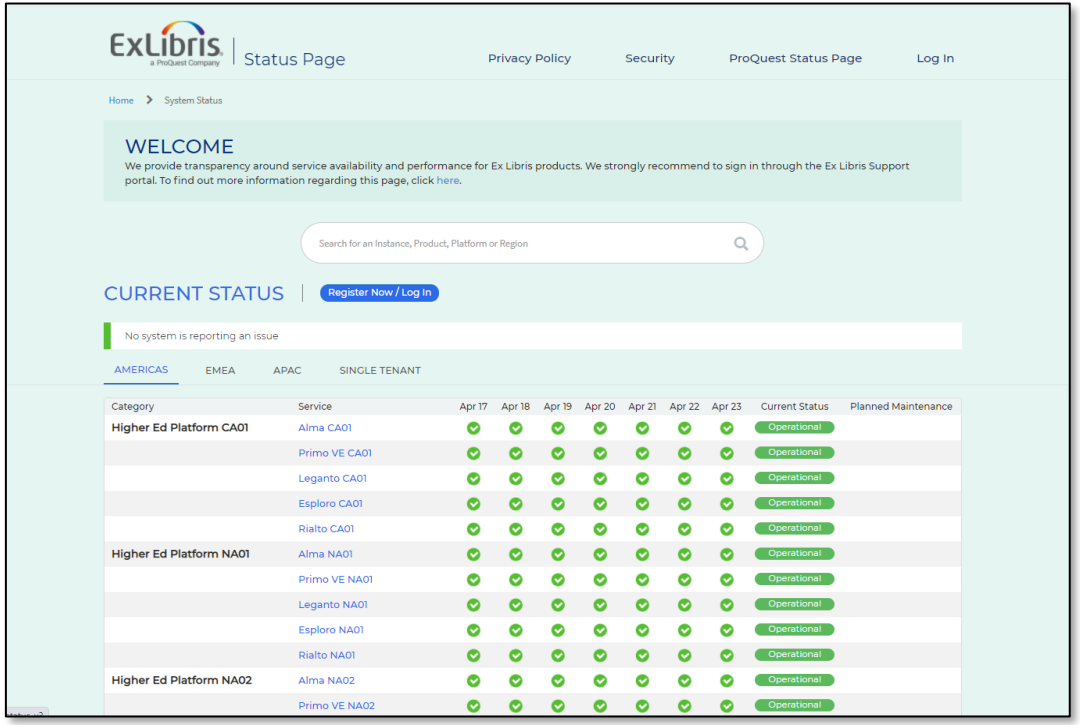
Additional Information in the Customer Knowledge Center

- **Recommendation Page:**
  - Recommendations for how customers can prepare for the migration are available and accessible online.
  - Data Center Migration (Moses Lake Data Center, DC 01) Recommendations
- **FAQ Page:**
  - A document covering frequently asked questions is available online.
  - Data Center Migration (Moses Lake Data Center, DC 01) FAQ



© 2021 Ex Libris | Confidential & Proprietary

Updated Status Page



https://status.exlibrisgroup.com/

© 2021 Ex Libris | Confidential & Proprietary

ELUNA 2021 Annual Meeting Online



- Opening Session & Ex Libris Updates, & DEI. May 3, 1-4 pm EDT (New York)
- Updates
  - Teaching & Learning, Leganto, & Aleph. May 5, 1-4 pm EDT
  - Support, SFX, Rosetta, & ELUNA 101. May 11, 1-4 pm EDT
  - Research, Esploro, Rialto, Analytics & Linked Open Data. May 13, 1-4 pm EDT
  - Discovery, CDI, & Summon. May 18, 1-4 pm EDT
  - Library Management, Alma, & Content. May 19, 1-4 pm EDT
  - Resource Sharing, Rapido, Rapid, & Voyager. May 25, 1-4 pm EDT
  - Ex Libris Vision, Primo and ELUNA Closing Session. May 27, 1-4 pm EDT
- Register at https://el-una.org/meetings/eluna-2021-annual-meeting-online/

© 2021 Ex Libris | Confidential & Proprietary



Thank you!

Brent.Cook@exlibrisgroup.com

Ex Libris
a ProQuest Company