What's New with Summon & 360/Intota Services



April 2022

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Brent D. Cook
Director, Product Management
Summon



Amy Pemble
Director, Product Management
Intota & 360 Services

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- Review Summon Accomplishments
  - New Summon Functionality
- Summon: Looking Ahead
  - August Release
  - Roadmap Review
- 360 and Intota: Looking Ahead
- Upcoming Webinars and Community Involvement
- Questions?



Review Recent Summon Accomplishments

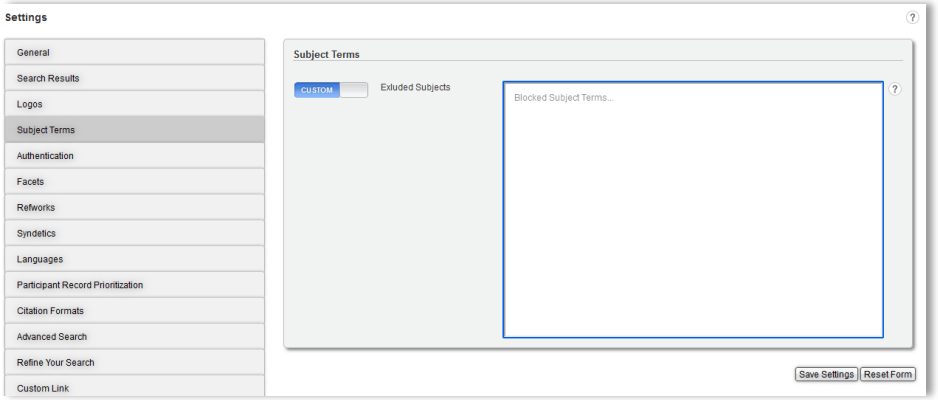
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Ability to Block Display of Subject Headings by Institution

Manage subject terms that appear in the Facet Pane on the Summon Results Page

- Provide ability to block offensive terms in Subject Term facet
- Institutions can manage their specific block list for subject terms based on their specific needs
- Text is still indexed and used for relevance



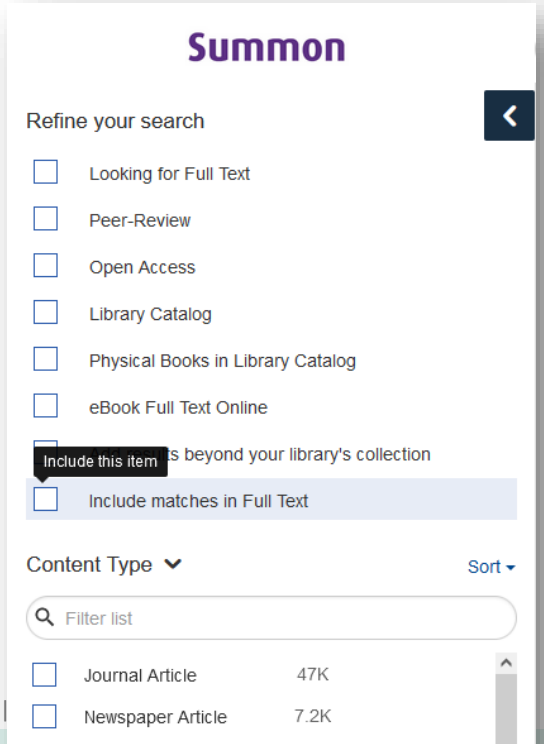
2022 H1

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Optional Full Text Searching

Users can choose if their searches should include or exclude records based on full text matches



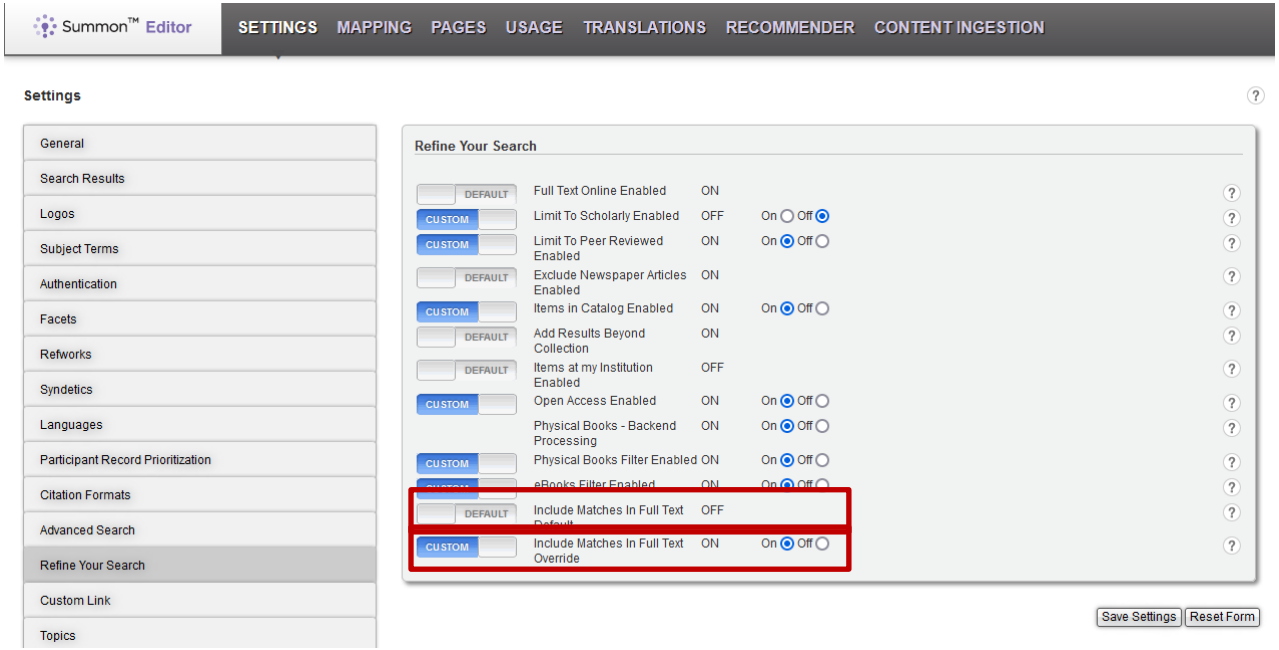
- Faster, more targeted results for the end user
- Reduce long tail
- Faster response time
- Ability to expand results set by searching full text

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Optional Full Text Searching



To Configure

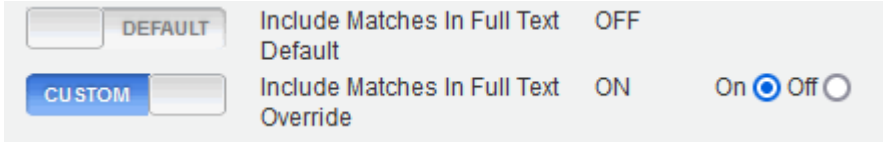
- In the Summon Admin Console under Settings > Refine Your Search
- “Include matches in Full Text Default” configures your default Summon search behavior
- “Include Matches in Full Text Override” configures the full text facet

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Optional Full Text Searching

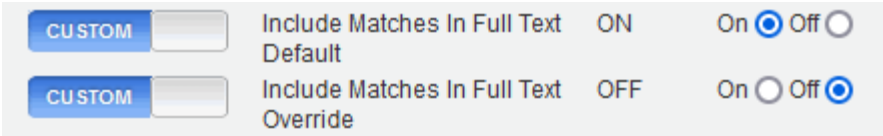
Best performance and most options

- Shortens the long tail and increases performance for the query; also allows users to add a full text search when they want



Perform like Classic Summon Search

- Search full text by default with no option to modify this behavior



Shorten the Long Tail for Increased Performance and Less Noise

- Default searches don't include full text and the user doesn't have the option to add this field to their searh



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QuickLinks Provider List Expanding

Provider	Content	Type of Quicklink (PDF/HTML)
ACM	All	PDF
Elsevier ScienceDirect	All	HTML
ProQuest	All Content excluding eBooks on the ProQuest Platform: https://www.proquest.com	HTML (in most cases a link to download the PDF full text is included with the article)
Sage	Journals under https://journals.sagepub.com	PDF, HTML
Springer	Journals and Books under https://link.springer.com	PDF, HTML
Wiley	Journals and Books under https://onlinelibrary.wiley.com	PDF, HTML
Bioone	Journals Content under https://bioone.org	PDF
IOP Publishing	All	PDF
National Library of Medicine	Content which is part of PubMed Central collection under https://www.ncbi.nlm.nih.gov	PDF, HTML
New England Journal of Medicine	Content under https://www.nejm.org	PDF, HTML
Emerald	Journals and Books under https://www.emerald.com/	PDF, HTML
Credo Reference	Content under https://search.credoreference.com/	HTML

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Summon Looking Ahead: 2022 Roadmap

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Planned Release Dates and Preview Environment

- Quarterly Releases—include release notes and preview period
  - February 2 Preview January 26
  - May 4 No Preview (No user facing functionality)
  - August 3 Preview July 13
  - November 2 Preview October 19

- Maintenance Releases
  - First Wednesday of all other months
  - No preview
  - No release notes (unless it includes customer- or patron-facing functionality)

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Summon Roadmap Highlights

2022 H1	2022 H2
• Summon UI Refresh: Improvements on the December 2021 Release • Ability to exclude subject headings, by institution • SAML support for Sierra via Summon (SvS) (for Early Adopter Testing)	• SAML support for Sierra via Summon (SvS) • Summon UI Refresh: QuickView/Preview Pane, Advanced Search, My Library Card improvements (SvS), and Results Page Refinements • Display Coverage Dates for E-journals in Summon Results (NERS) • Refine Content Type Web Resource to Identify Online Newspaper Articles (NERS) • Ensure OA link Is Available for Open Access Content (NERS) • Collection Discovery for Summon over Alma (NERS) • Custom Citation Styles
• Data Quality Improvements • Ongoing Analytics • Accessibility	• Design and plan for LTI for Summon (NERS)

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User Experience (UI and functions)

User Experience	Summon UI Refresh: Quick View / Preview Pane
	Summon UI Refresh: Advanced Search
	Custom Citation Styles
	Collection Discovery for Summon over Alma NERS

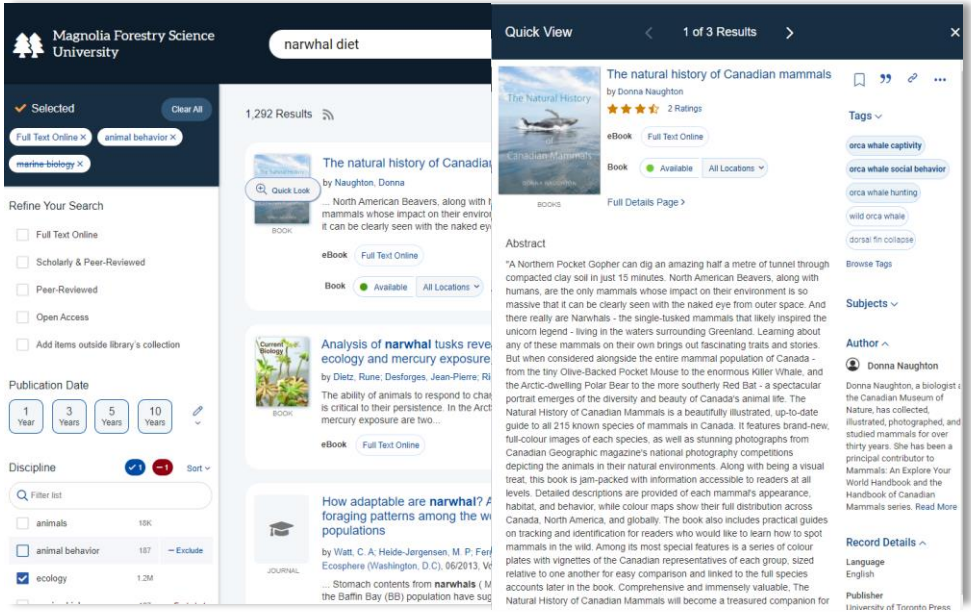
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Summon UI Refresh: Quick View / Preview Pane

Provide more detailed information on a brief result via a Quick View overlay pane

- Provide more information on a specific result without leaving the Search Results Page
- Improved visual and placement based on user feedback and expectations from other sites



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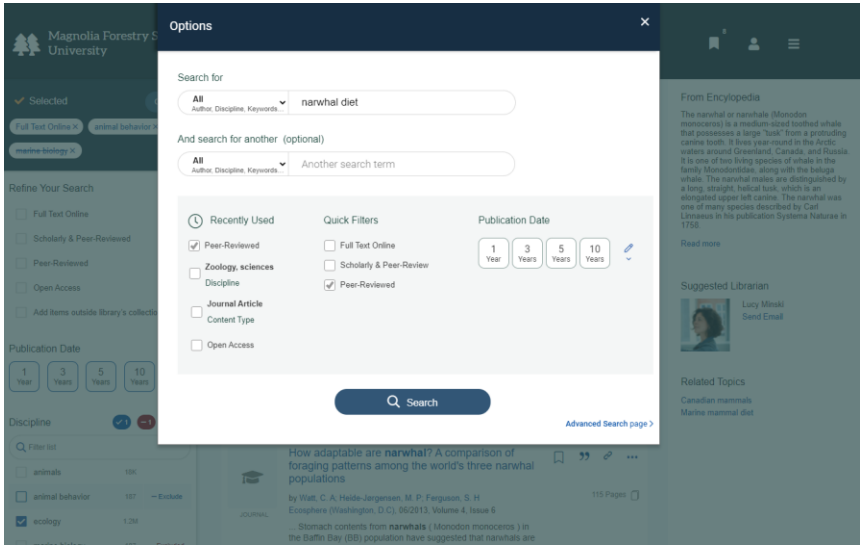
2022 H2

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Summon UI Refresh: Advanced Search

Improve access to Advanced Search features via simplified overlay and refresh Advanced Search Page for useability

- Create a new Advanced Search overlay so frequently used tools are easily accessible
- Refine Advanced Search page for better usability



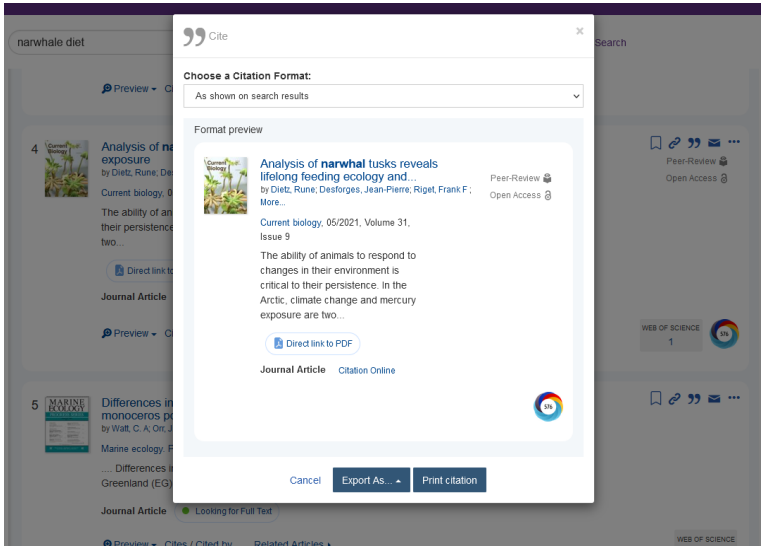
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Custom Citation Styles

Ability to create custom citation styles

- Create new citation styles that currently are not available in Summon
- Create styles based on existing ones that match your institution’s needs



2022 H1

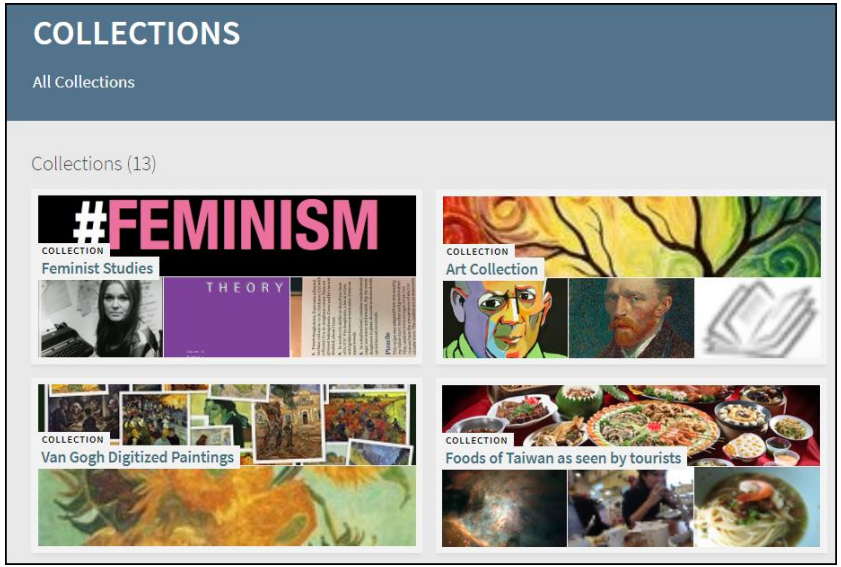
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Collection Discovery

Support for Collection Discovery for Summon over Alma

- Allow libraries to manage collections of titles by grouping them in categories for easy browsing
- Available for Summon over Alma sites



NERS

2022 H2

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Open Systems and Integration

Open Systems and Integration	Sierra via Summon: SAML Support
	Sierra via Summon: My Library Card Improvements
	LTI Support for Summon (Design and Plan)

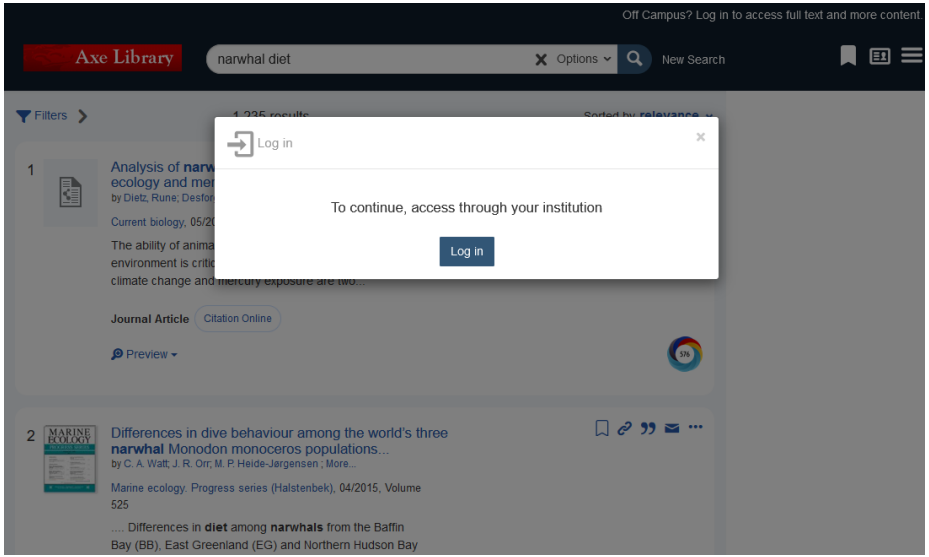
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Sierra via Summon: SAML Support

Ability to log into Sierra via Summon using SAML authentication

- Add SAML integration to the current Sierra via Summon integration
- Will support both CAS and SAML
- First step in additional improvements for authentication



2022 H2

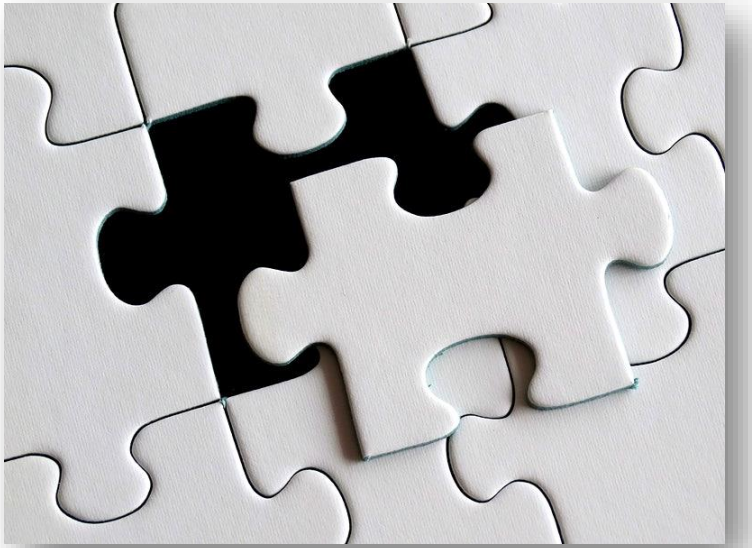
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LTI Support for Summon

Design and Plan Implementation of an LTI for Summon

- Ability to integrate Summon into Learning Management Systems (LMS) such as Canvas
- Develop LTI (Learning Tools Interoperability) Support
- Initial design and plan; delivery of functionality dependent on overall requirements generated from plan



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Search and Ranking

Search and Ranking

Better Identify Online Newspaper Articles



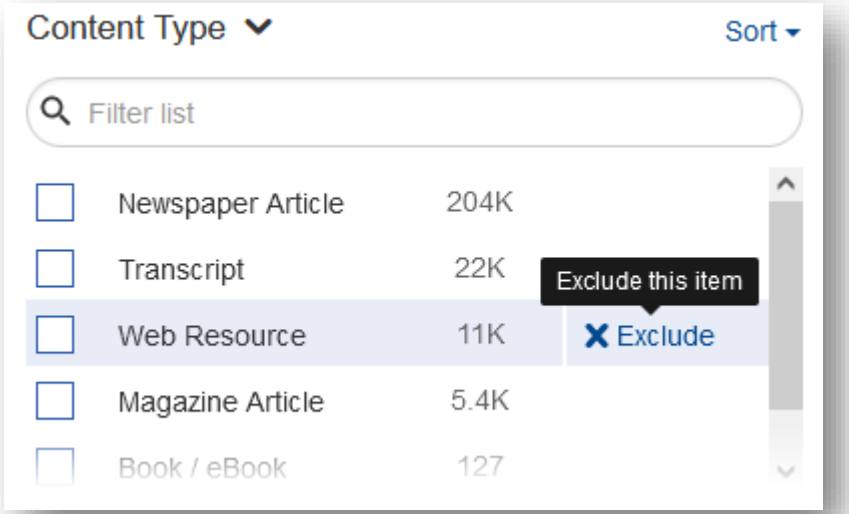
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Better Identify Online Newspaper Articles

Refine Content Type Web Resource to Identify Online Newspaper Articles

- Improve identification of online newspaper content currently identified as Web Resources



NERS

2022 H2

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Linking to Full Text

Linking to Full Text	Improve Open Access Linking	NERS
	Provide Detailed Journal Coverage Dates	NERS

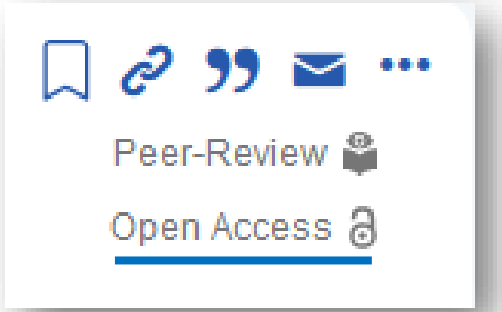
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Open Access Linking

Ensure OA link Is Available for Open Access Content

- Improve linking to Open Access Content
- Link directly from OA icon to available content



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Journal Coverage Dates

Display Coverage Dates for E-journals in Summon Results

- Show coverage dates with links for title-level e-journal results in the Summon search results



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Data Quality and Rights

Data Quality and Rights	CDI Rights Processing Improvements - Enhanced Performance and Improved Matching
	Ongoing Improvements in the Merged Record

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Ongoing Improvements

Other	Accessibility
	Analytics

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360 and Intota: Quarterly Release

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June 2022 Release

- New Date! **June 17**
  - Release will deploy simultaneously with the database software upgrade already scheduled for that time
  - Both require downtime so we want to minimize disruption
  - 24 hours downtime
  - Start time:

Seattle, USA	Fri, Jun 17, 2022 at 6:00 pm PDT
New York, USA	Fri, Jun 17, 2022 at 9:00 pm EDT
London, United Kingdom	Sat, Jun 18, 2022 at 2:00 am BST
Sydney, Australia	Sat, Jun 18, 2022 at 11:00 am AEST
UTC	Sat, Jun 18, 2022 at 01:00



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Release Highlights



- NERS: change EJP sort order to favor main title over alternate titles
- Idea Exchange: show the MARC record availability percentage at the database level
- IEDL refinements
- VPAT 2022 updates: 360 Core Client Center
- Improve SUSHI harvesting error identification and communication to users

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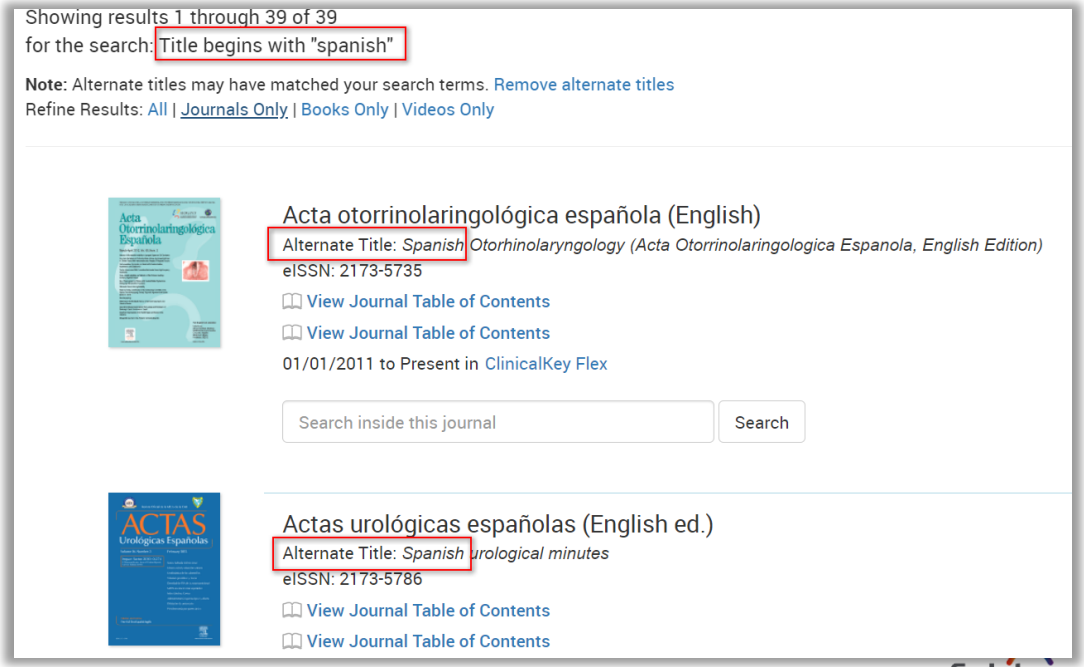
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EJP: Sort Main Titles Ahead of Alternate Titles

Rank main titles with the search string ahead of alternate titles

- Top-rated NERS project
- Eliminate user confusion when a main title doesn't include the search string
- Optional—you can retain current ranking if you'd like!

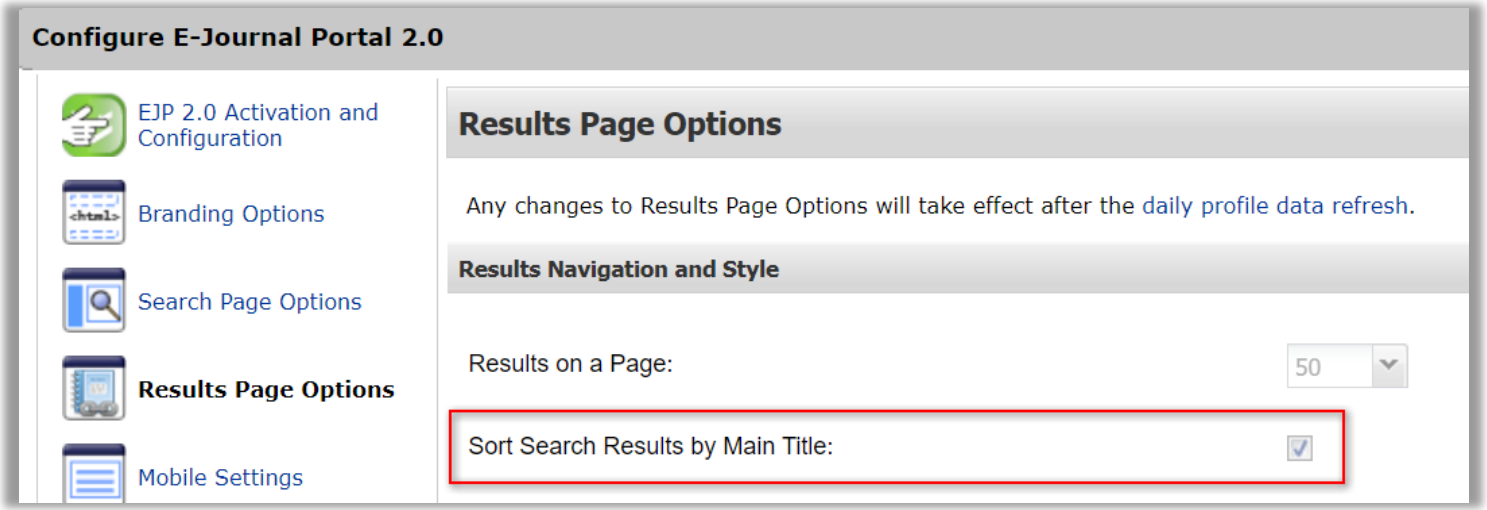
NERS



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EJP: Sort Main Titles Ahead of Alternate Titles



- **Title begins with**
- **Title equals**
- **Titles contains all words**

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EJP: Sort Main Titles Ahead of Alternate Titles

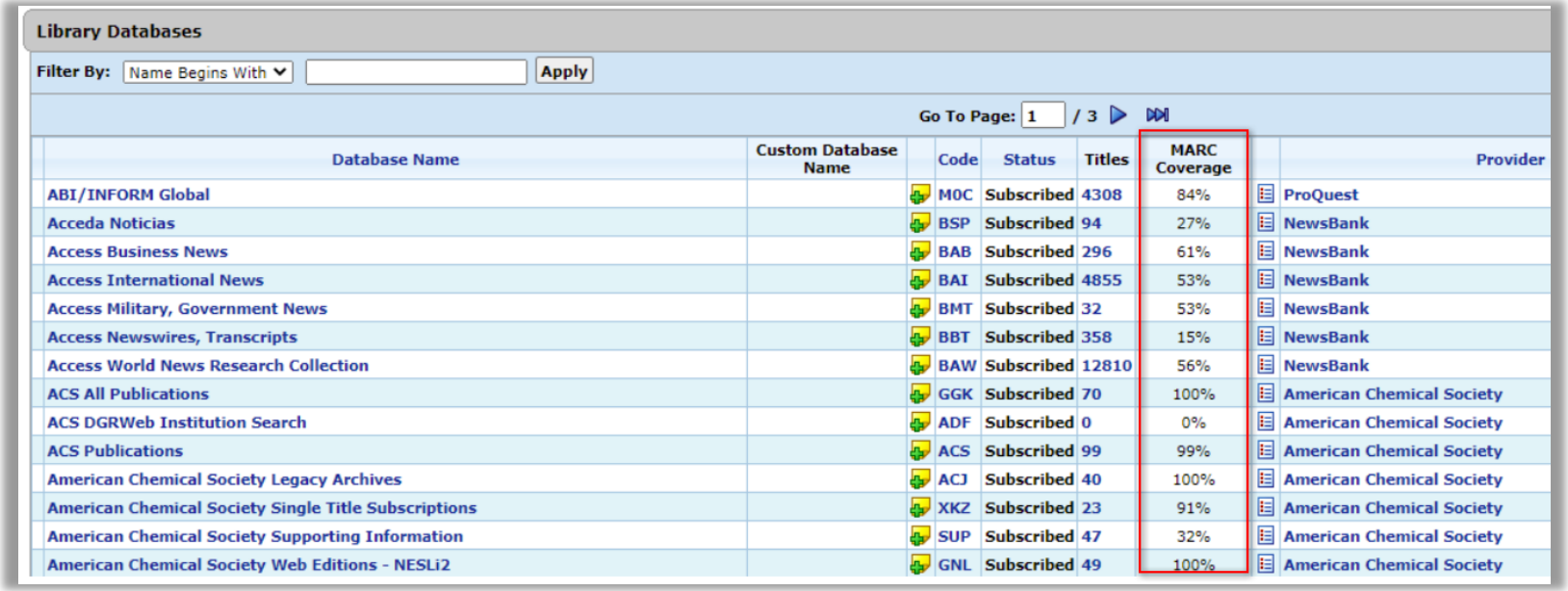
Original	New
Acta otorrinolaringológica española (English)	Spanish
Actas urológicas españolas (English ed.)	Spanish
The Blue Division: Spanish Blood in Russia, 1941-1945	Spanish almonds and their introduction into America
El castellano de Getxo : estudio empírico de aspectos morfológicos, sintácticos y semánticos de una variedad del castellano hablado en el País Vasco	Spanish America and British romanticism, 1777-1826 : rewriting conquest
The Cinema of Álex de la Iglesia	Spanish America from the earliest period to the present time, by Julian Hawthorne
Cirugia española (English ed.)	Spanish America It's Romance , Reality And Future vol-1
Construyendo puentes = Building bridges : concepts and models for service-learning in Spanish	Spanish America, its romance, reality and future
Cuaternario y geomorfología	Spanish America, Its Romance, Reality and Future, Vol. 1
	Spanish America, Its Romance, Reality and Future,

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Display MARC Record Availability

View the MARC record availability (i.e. normalization percentage) at the database level



Library Databases

Filter By: Name Begins With Apply

Go To Page: 1 / 3

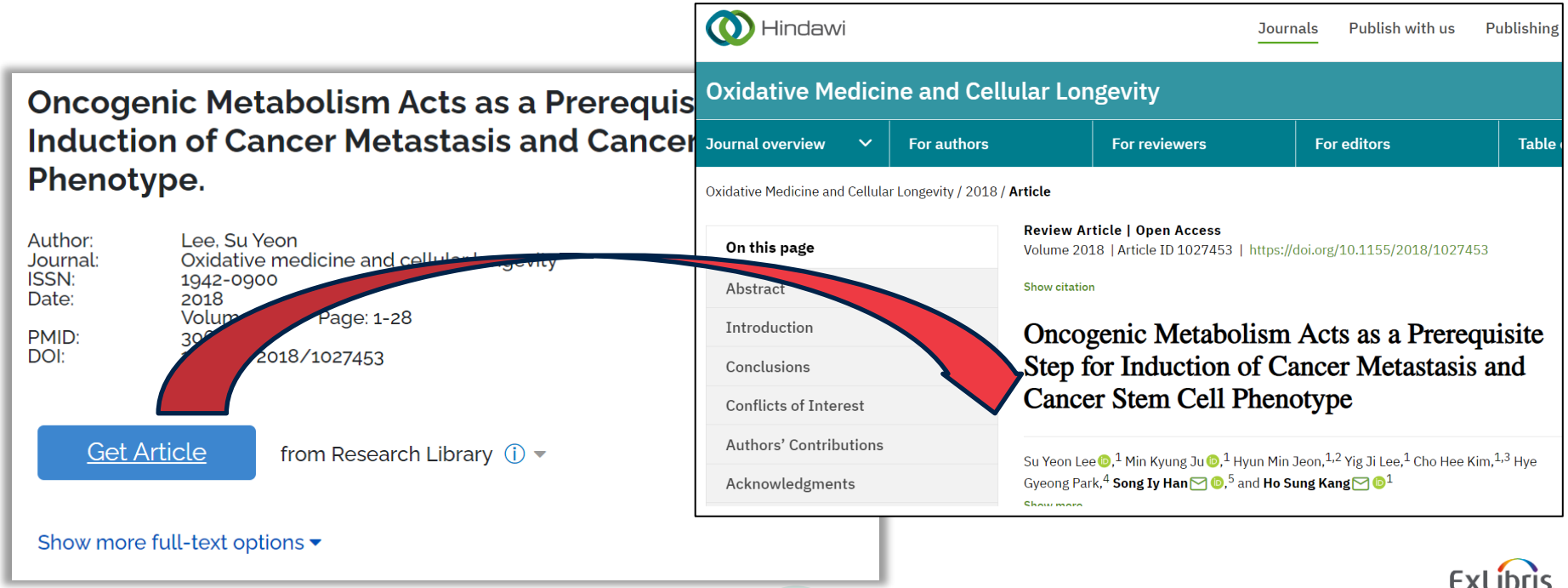
Database Name	Custom Database Name	Code	Status	Titles	MARC Coverage	Provider
ABI/INFORM Global		M0C	Subscribed	4308	84%	ProQuest
Acceda Noticias		BSP	Subscribed	94	27%	NewsBank
Access Business News		BAB	Subscribed	296	61%	NewsBank
Access International News		BAI	Subscribed	4855	53%	NewsBank
Access Military, Government News		BMT	Subscribed	32	53%	NewsBank
Access Newswires, Transcripts		BBT	Subscribed	358	15%	NewsBank
Access World News Research Collection		BAW	Subscribed	12810	56%	NewsBank
ACS All Publications		GGK	Subscribed	70	100%	American Chemical Society
ACS DGRWeb Institution Search		ADF	Subscribed	0	0%	American Chemical Society
ACS Publications		ACS	Subscribed	99	99%	American Chemical Society
American Chemical Society Legacy Archives		ACJ	Subscribed	40	100%	American Chemical Society
American Chemical Society Single Title Subscriptions		XKZ	Subscribed	23	91%	American Chemical Society
American Chemical Society Supporting Information		SUP	Subscribed	47	32%	American Chemical Society
American Chemical Society Web Editions - NESLi2		GNL	Subscribed	49	100%	American Chemical Society

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360 Link: New Refinements to IEDL

Enhance linking accuracy with continued refinements to Index Enhanced Direct Links (IEDL)



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360 and Intota: Looking Ahead

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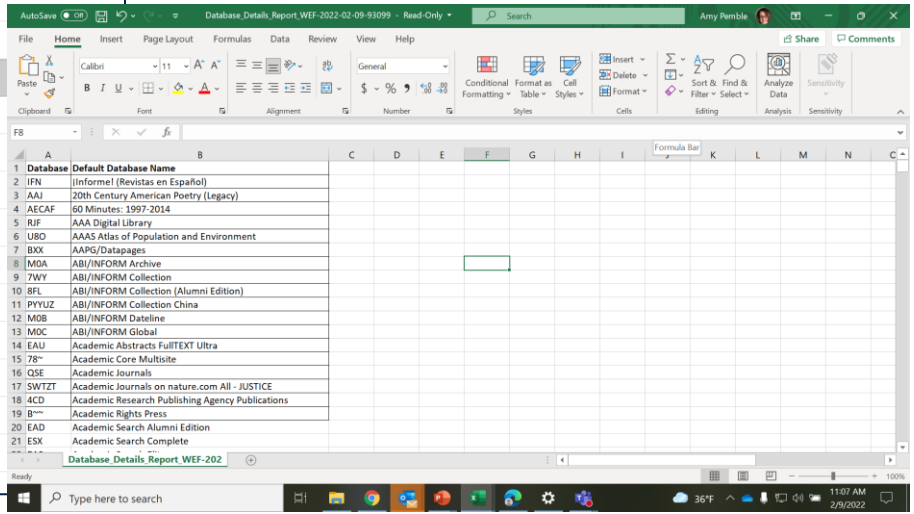
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360 Link: Upload Database Order

Upload a .TSV file to 360 Link Database Order

209	Backfile Package - Psychology (Legacy) [YPT]
210	Sharpe Online Reference
211	Slavery, Abolition and Social Justice, 1490-2007
213	SPIE journals
214	Springer Books
215	Springer Online Journals Complete
216	SpringerLINK - SCELC Combo
217	SpringerLink Contemporary (1997 - Present)
218	Taylor & Francis Online
219	Thieme Clinical Collections
220	Thieme E-Library
221	Thieme-Connect
222	Thèses.fr
223	UC Press E-Books Collection, 1982-2004 (Public)
224	University of California Press Journals
225	UPCC Books 2013 Complete Collection
218	Wiley-Blackwell Online Books - All Titles (includes Withdrawn titles)

Springer Online Journals Complete



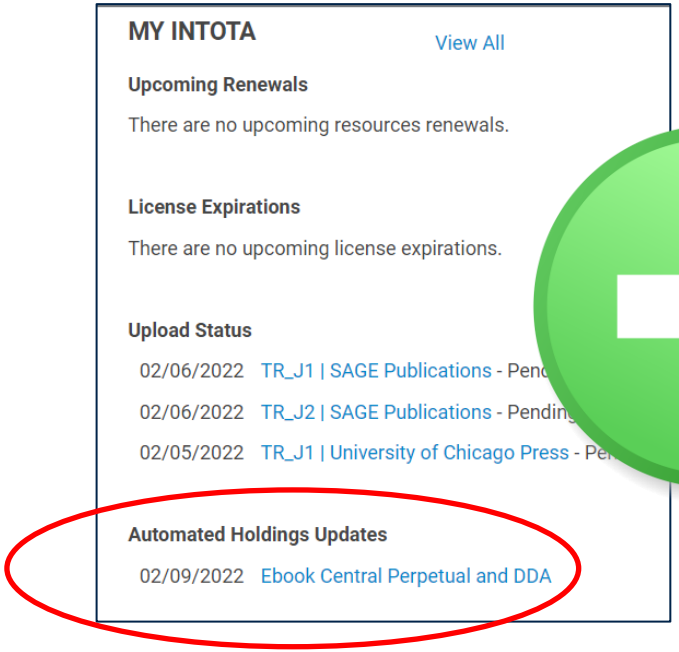
Database	Default Database Name
IFN	¡Informe! (Revistas en Español)
AAJ	20th Century American Poetry (Legacy)
AECAF	60 Minutes: 1997-2014
RJF	AAA Digital Library
U8O	AAAS Atlas of Population and Environment
BXX	AAPG/Datapages
M0A	ABI/INFORM Archive
7WY	ABI/INFORM Collection
8FL	ABI/INFORM Collection (Alumni Edition)
PYYUZ	ABI/INFORM Collection China
M0B	ABI/INFORM Dateline
M0C	ABI/INFORM Global
EAU	Academic Abstracts FullTEXT Ultra
78~	Academic Core Multisite
QSE	Academic Journals
SWTZT	Academic Journals on nature.com All - JUSTICE
4CD	Academic Research Publishing Agency Publications
B~~	Academic Rights Press
EAD	Academic Search Alumni Edition
ESX	Academic Search Complete

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Integrate NISO Recommended Practices for KBART Automation

Expand auto-holdings support beyond Ebook Central





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Infrastructure Investments

- Database software migration June 17
- Intota Assessment migration to Oracle Analytics Server *tentative June*
- Streamline feeds to CDI

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Upcoming Webinars and Community Engagement

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Upcoming Webinars and User Group Activities

- **Summon webinars (June & July)**
  - June 8 – Discover Summon: Administrative Tips for New Staff
  - July 18 & July 19 – What's New with Summon
- **Ex Libris User Group Activities (May 9-25, 1:00 – 4:00 pm EDT)**
  - May 9 - ELUNA Opening Session, Ex Libris Updates, & Keynote: Todd Carpenter, Executive Director, NISO
  - May 10 - Management, Resource Sharing, Discovery, RapidILL, Rapido, and SFX
  - May 11 - Research Excellence, Esploro, and Linked Data
  - May 16 - DEI, Primo, and Analytics
  - May 17 - Customer Experience, Rosetta, Library Mobile, and Voyager.
  - May 18 - Student Success, Aleph, Rialto, and Leganto
  - May 24 - Data Excellence, Content, Summon/360, and Ex Libris Q&A
  - May 25 - MetaDoor, Alma, CDL, and ELUNA Closing Session
- **IGeLU 2022 Annual Conference (Sept. 9-12)**

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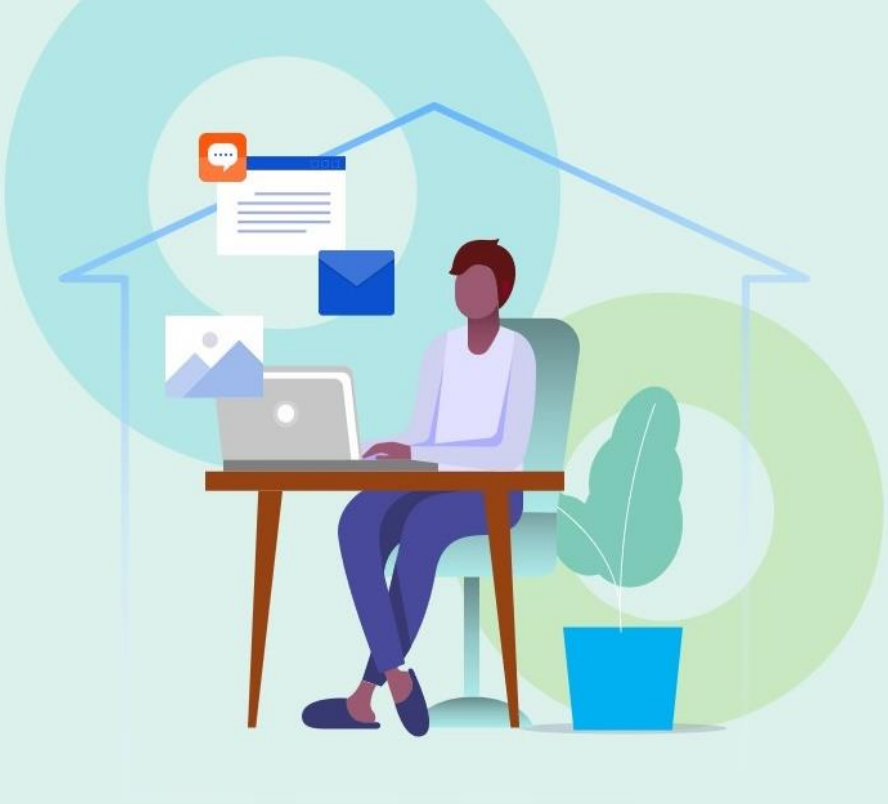
Questions?

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