

What's New with Summon & 360/Intota Services

January 2023

ExLibris
Part of Clarivate





Brent D. Cook
Director, Product Management
Summon



Amy Pemble
Director, Product Management
Intota & 360 Services

© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate



Summon

- Review 2022 accomplishments
- A look ahead
  - February Release
  - Candidates for 2023 Summon Roadmap
- 360 and Intota Services
- Community Involvement and Webinars
- Questions?



Review Accomplishments during 2022

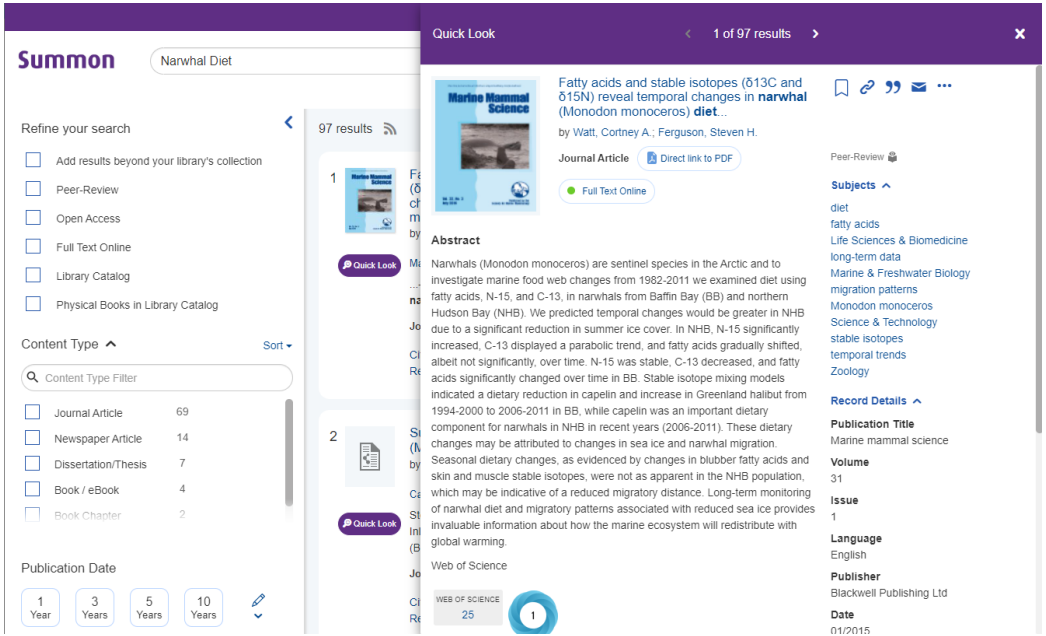
© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

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



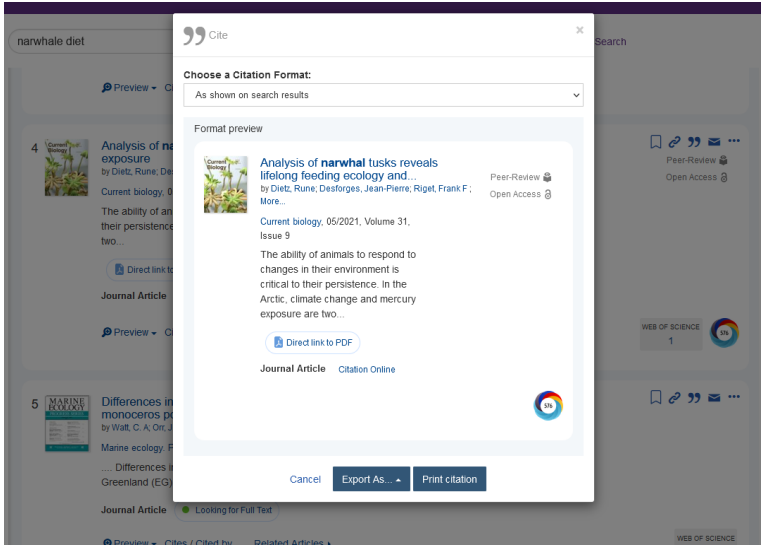
© 2023 Ex Libris | Confidential & Proprietary

Ex Libris Part of Clarivate

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
- You can find information on how to add or modify citation styles to CSL at https://citationstyles.org/



© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Better Identify Online Newspaper Articles

Refine Content Type Web Resource to Identify Online Newspaper Articles

Records currently classified as "Web Resource" with one of these titles will be reclassified as "Newspaper Article”

- The Washington Post (Online)
- The Baltimore Sun (Online)
- New York Times (Online)
- Los Angeles Times (Online)
- USA Today (Online)
- Tampa Bay Times (Online)
- Rockland County Times
- Kenora Daily Miner and News (Online)
- The Chatham Daily News (Online)
- The Huffington Post (Blogs on Demand)
- The Business Insider (Blogs on Demand)
- Washington Post – Blogs
- News (Westport, N.Z.)
- The Economic Times e-paper
- Hartford Courant (Online)
- Chicago tribune (1963)
- The Times of India (1861-current)
- The Toronto Star (Online)
- Buffalo News
- The Atlanta Journal - Constitution (Online)

NERS

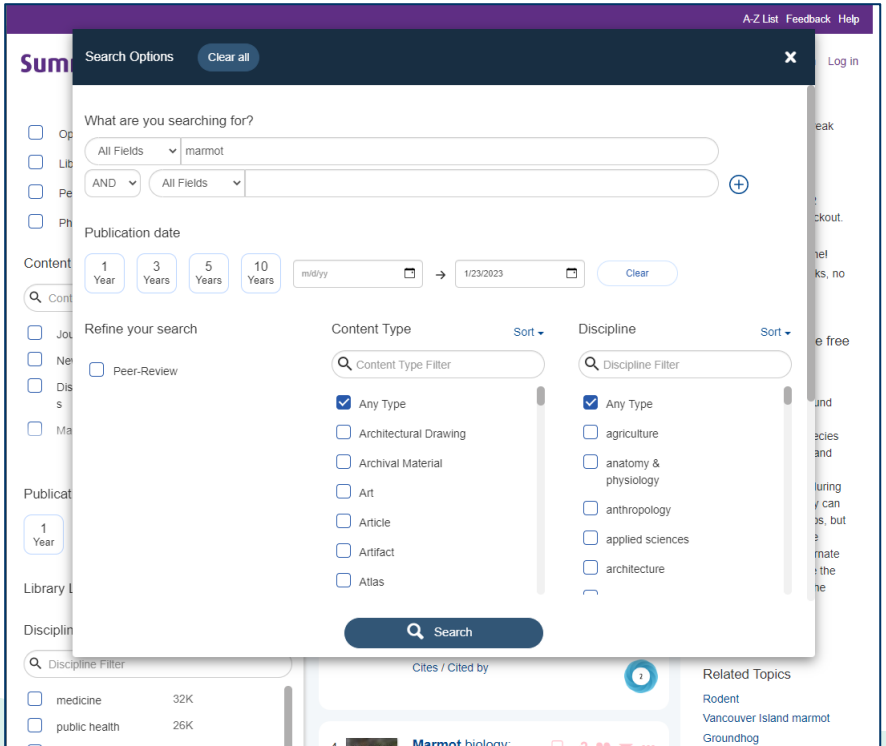


© 2023 Ex Libris | Confidential & Proprietary

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

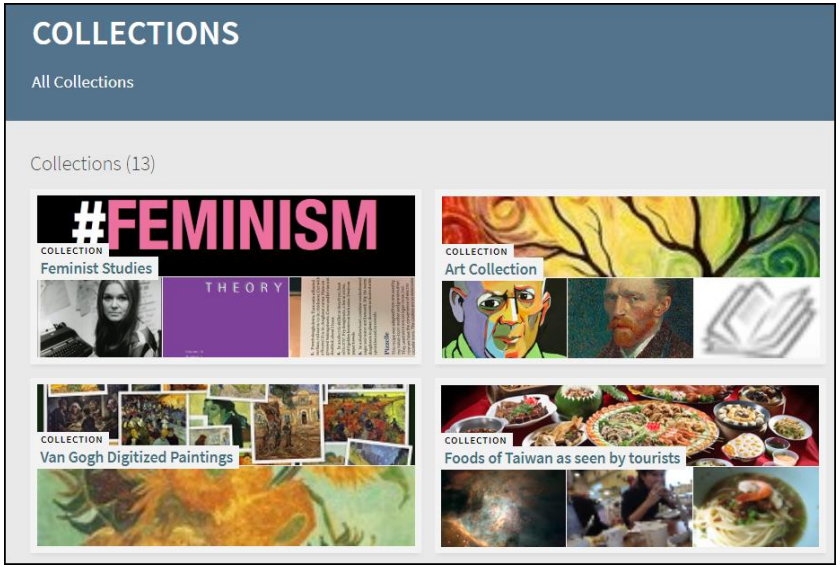


© 2023 Ex Libris | Confidential & Proprietary

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

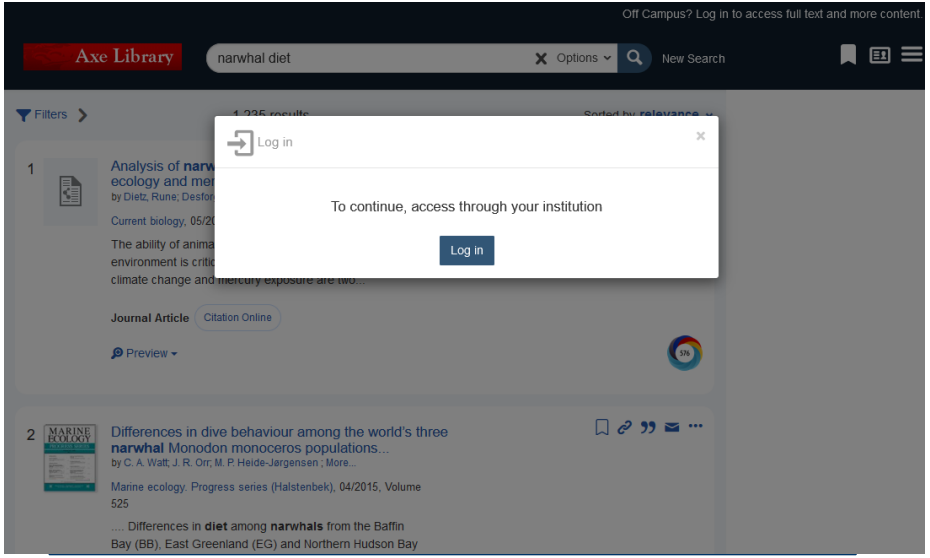
© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Sierra via Summon: SAML Support

Ability to log into Sierra via Summon using SAML authentication

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



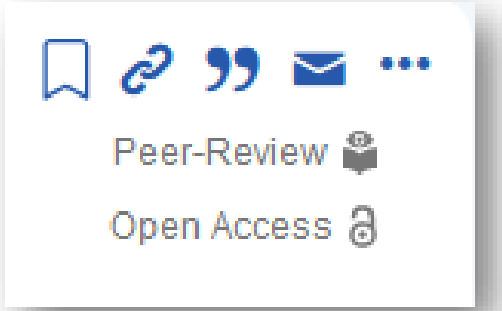
© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

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



© 2023 Ex Libris | Confidential & Proprietary

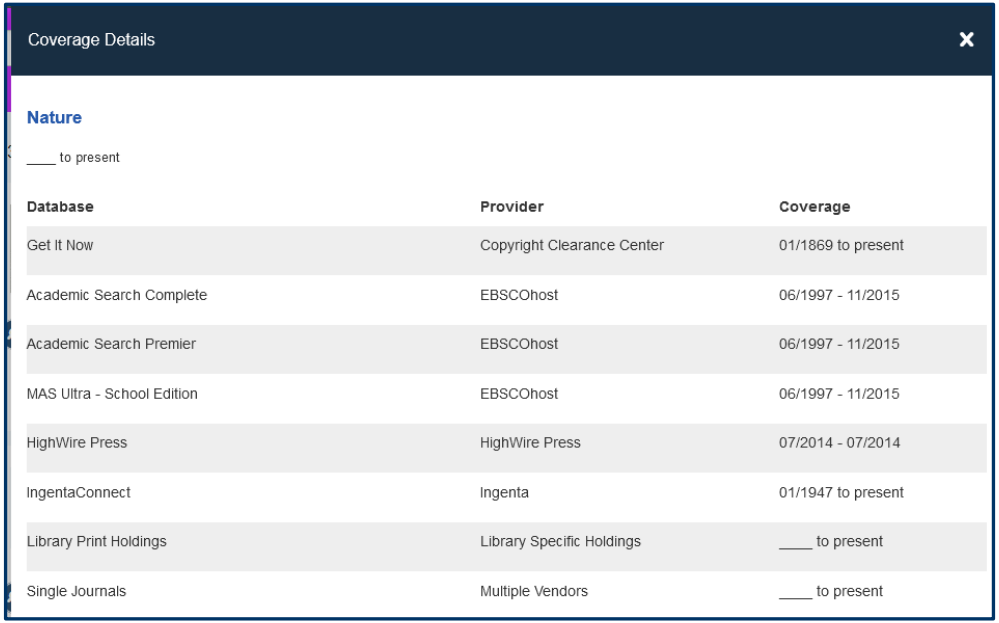
NERS

ExLibris
Part of Clarivate

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



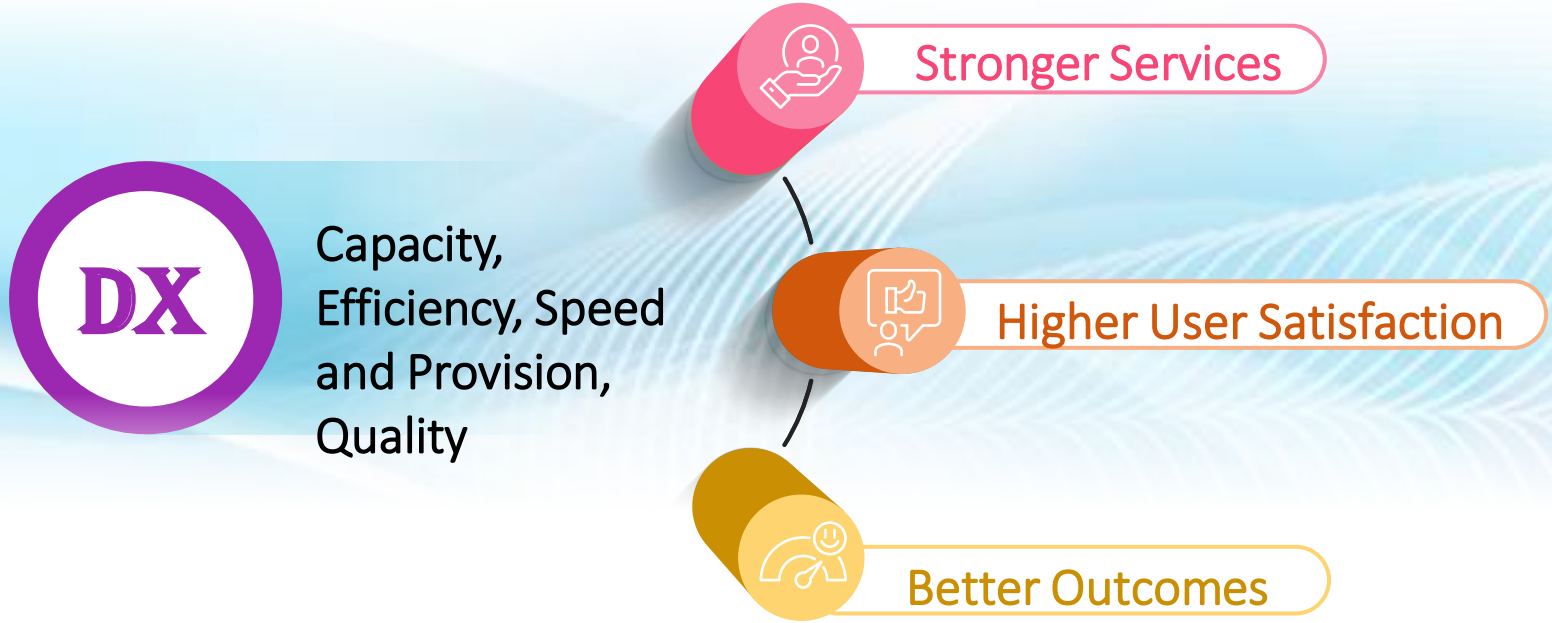
NERS

© 2023 Ex Libris | Confidential & Proprietary

ExLibris Part of Clarivate

Data Excellence (DX)

Addressing the intersection between **Content**, **Technology** and **Users** as part of a data-driven cross-company strategy



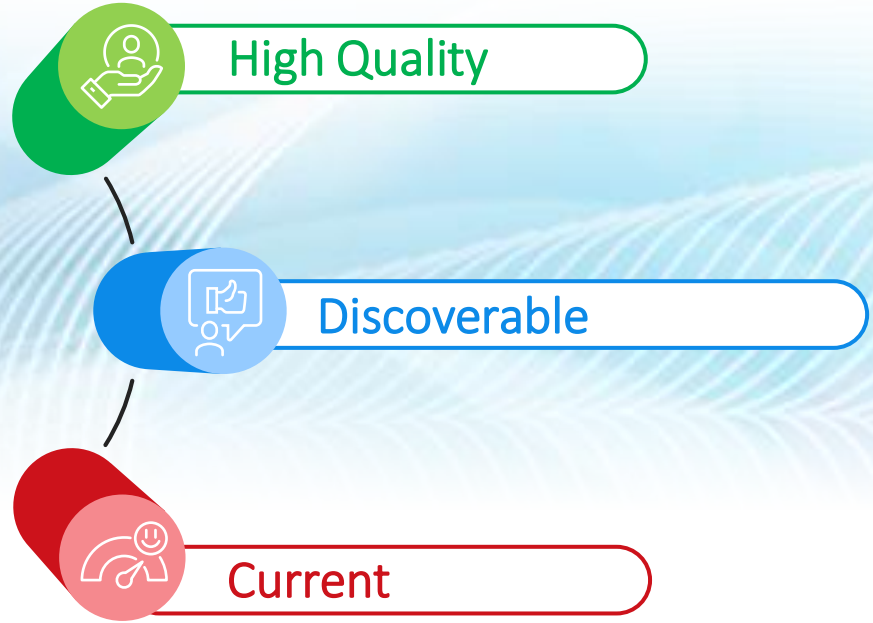
© 2023 Ex Libris | Confidential & Proprietary

Data Excellence (DX)

Addressing the intersection between **Content**, **Technology** and **Users** as part of a data-driven cross-company strategy

DX

Putting the excellence in data



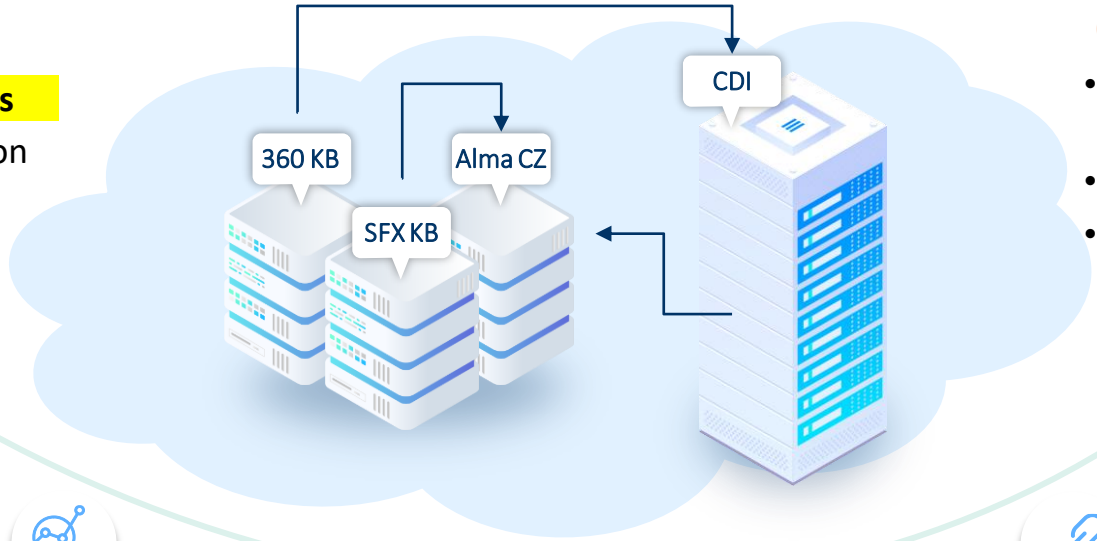
© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Content Across Our Services

KBs/CZ

- **74,700 collections**
- 15% annual collection growth



Central Discovery Index

- Books, articles, chapters, videos, datasets, more…
- **5.14 billion records**
- 10% annual record growth

Resource Management
Alma

Discovery
Primo/Primo VE
Summon

Acquisitions
Rialto

Research Workflows
Esploro

Linking
SFX
360

Resource Sharing
Rapido

© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Ebook Central book chapters in CDI

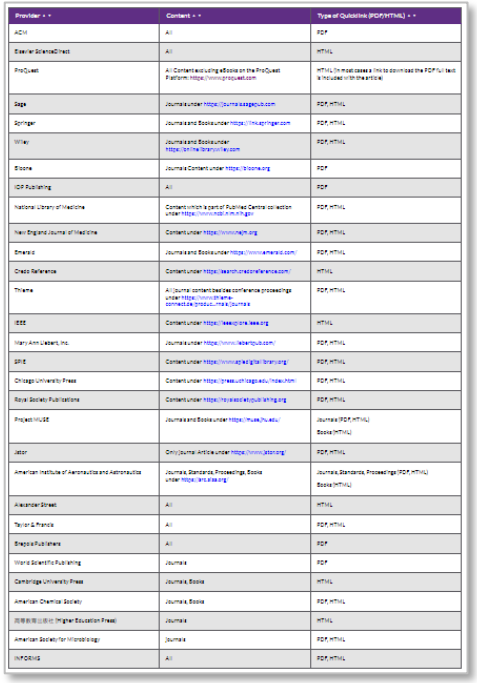
- November 2022 - first load of 55,000 records
- Gradually loading more until 20 million
- Will allow direct linking to chapter levels
- Boost search results



© 2023 Ex Libris | Confidential & Proprietary

Quicklinks

- 30 providers (+5 from Oct. 2022)
  - American Chemical Society
  - American Society for Microbiology
  - Cambridge University Press
  - 高等教育出版社 (Higher Education Press)
  - INFORMS
- Over 10,500 collections with 1.55 billion records
- Some usage metrics
  - Over 250 institutions with at least 100 clicks in November
  - Over 400 institutions currently active or testing
  - More than 300,000 clicks in November
  - Linking success rates – 99%



Provider	Content	Type of Quicklinks (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 within 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
Bloomsbury	Journals Content under https://bloomsbury.com	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
Thieme	All journal content besides conference proceedings under https://www.thieme-connect.de/products/journals	PDF, HTML
IEEE	Content under https://ieeexplore.ieee.org	HTML
Mary Ann Liebert, Inc.	Journals under http://www.liebertpub.com/	PDF, HTML
SPIE	Content under https://www.spiedigitallibrary.org	PDF, HTML
Chicago University Press	Content under https://press.uchicago.edu/index.html	PDF, HTML
Royal Society Publications	Content under https://royalsocietypublishing.org	PDF, HTML
Project MUSE	Journals and Books under https://muse.jhu.edu/	Journals (PDF, HTML) Books (HTML)
Jstor	Only Journal Article under https://www.jstor.org/	PDF, HTML
American Institute of Aeronautics and Astronautics	Journals, Standards, Proceedings, Books under https://arc.aiaa.org/	Journals, Standards, Proceedings (PDF, HTML) Books (HTML)
Alexander Street	All	HTML
Taylor & Francis	All	PDF, HTML
Begell Publishers	All	PDF
World Scientific Publishing	Journals	PDF
Cambridge University Press	Journals, Books	HTML
American Chemical Society	Journals, Books	PDF, HTML
高等教育出版社 (Higher Education Press)	Journals	HTML
American Society for Microbiology	Journals	PDF, HTML
INFORMS	All	PDF, HTML

https://knowledge.exlibrisgroup.com/Summon/Product_Documentation/Searching_in_The_Summon_Service/Search_Results/Summon%3A_Quicklinks_Provider_List

© 2023 Ex Libris | Confidential & Proprietary

Peer review in CDI

- Started from 506 million articles with Peer Review indication
- Now up to almost 551 million articles with Peer Review indication

Meaning we added ~45M correct Peer reviewed indication.

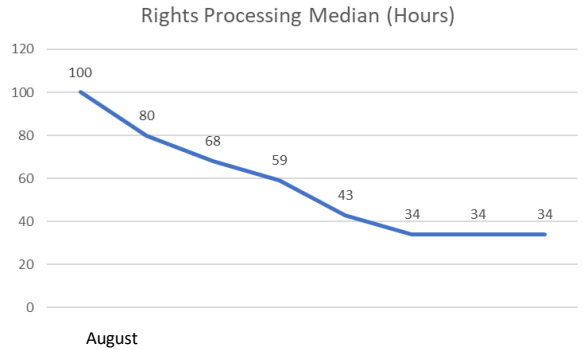


© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Enhancing Rights in CDI

- Improving rights processing
  - Decreased turnaround from 72-45 hours to 30 hours in November
  - Additional improvements in progress throughout 2023
  - Goal to reduce processing time to 24-48 hours





© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate



February Release

Preview Environment: January 18

Production Environment: February 1

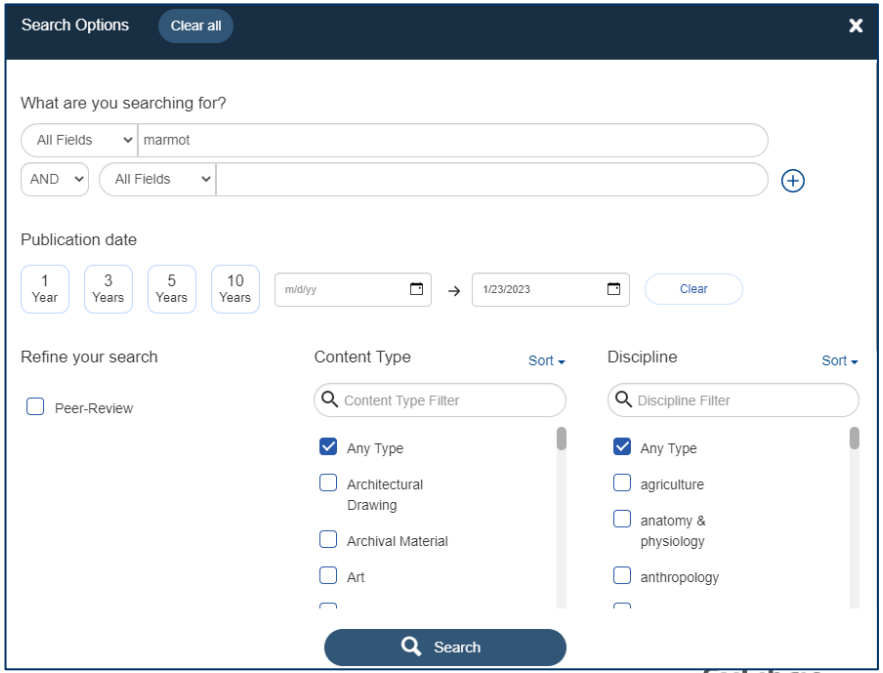
© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Advanced Search: Improve Search Box Layout

Improve Search Box Placement Based on Feedback

- All search boxes on the Advanced Search stack in one column
- Matches user expectation and layout of most major databases

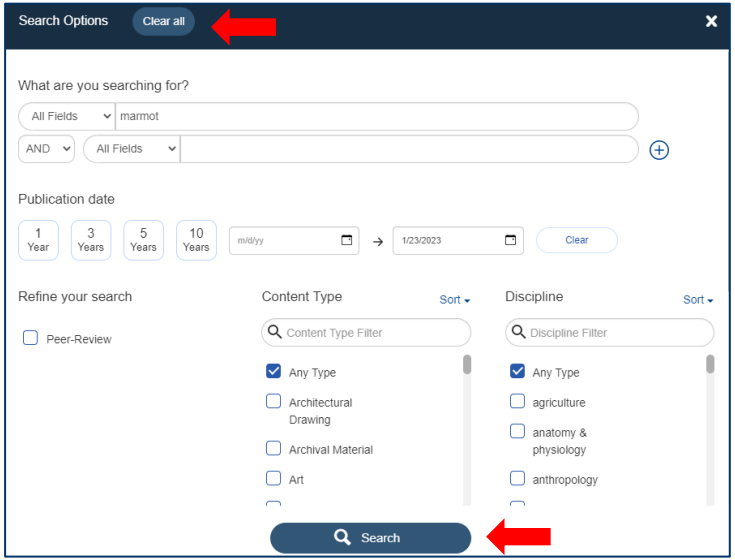


© 2023 Ex Libris | Confidential & Proprietary

Advanced Search: Updated Look and Feel Controls

Added missing controls for font and button colors on the Advanced Search form

- Colors for the font and button for “Clear All” and “Search” are now customizable



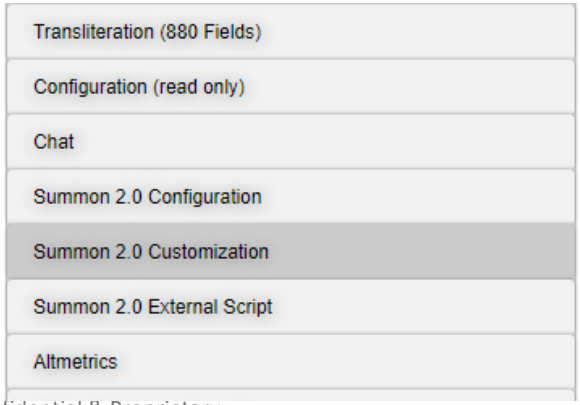
© 2023 Ex Libris | Confidential & Proprietary

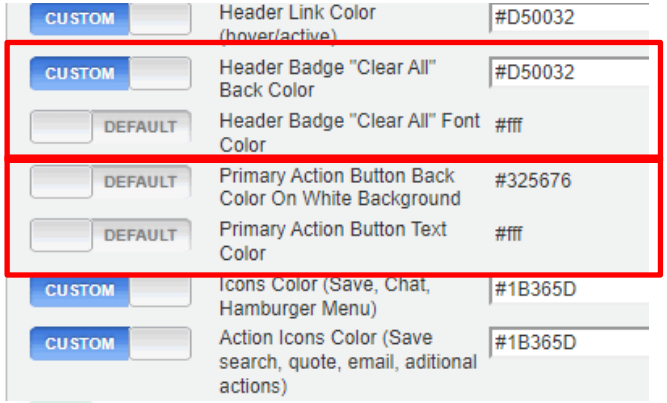
ExLibris
Part of Clarivate

Advanced Search: Updated Look and Feel Controls

These controls are in the Admin Console under Settings > Summon 2.0 Customizations

- To change the colors of the Clear All button, use the Header Badge “Clear All” Back Color and Font Color controls
- To change the colors of the Search button, use the Primary Action Button Back Color and Text Color controls





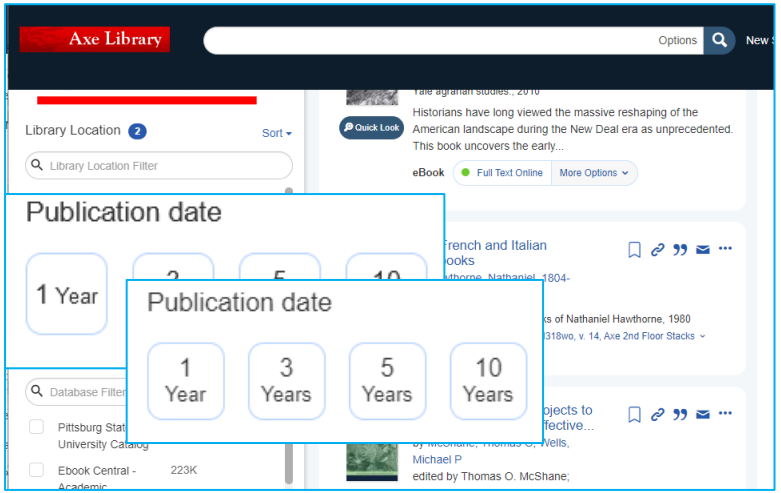
© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Summon UI Refresh: Additional Fixes

Improve Advanced Search Page based on your feedback

- Addressed issue with translation issue with "Search Options" on advanced search
- Fixed label formatting for “1 Year” button in Firefox
- Library location facet values selected on Advanced Search are now displayed on the Search Results page



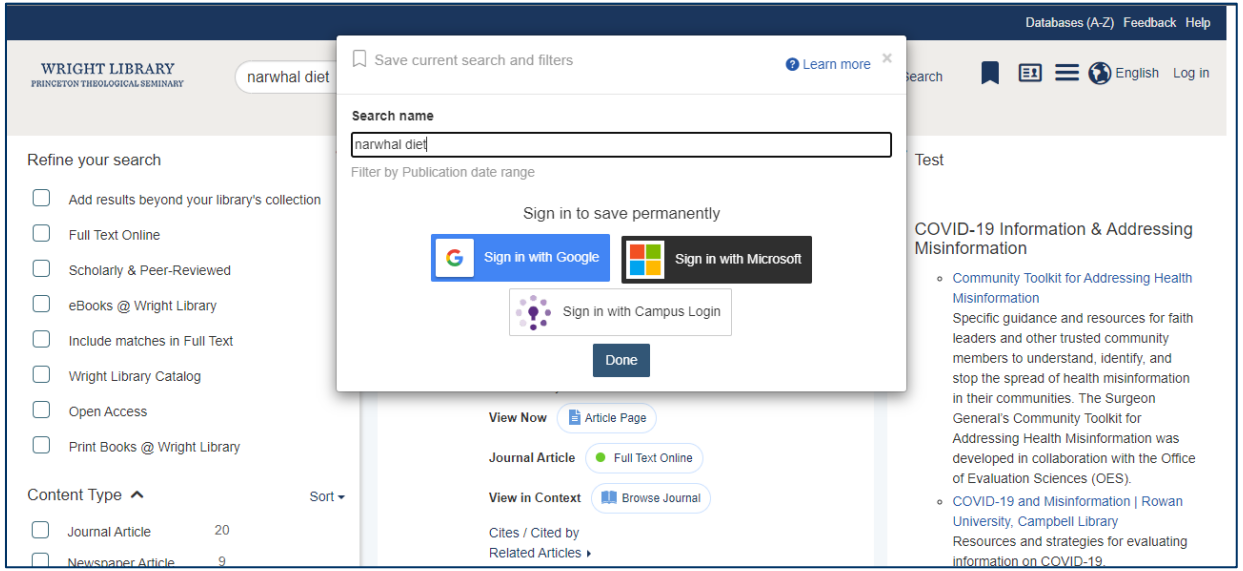
© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Sierra via Summon: SAML for Saved Searches

Ability to log into Saved Searches using SAML authentication

- Adds SAML integration to Saved Searches for Sierra via Summon institutions
- Allows for storage of Saved Searches on Summon Servers
- GDPR Compliant
- In addition to MS OneDrive and Google Drive logins



© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Additional Fixes and Improvements

Improvements and fixes based on your feedack

- Addressed issue preventing some public notes from being displayed in Quick Look
- E-journal coverage ranges will now display Custom Database Names when available
- Adjusted logic for reviewing links provided in emails from the Email Citation functionality
  - Previous logic was blocking emails from being sent
  - Current logic allows for emails to be sent without links if possible errors in linking
- Addressed issue with View in Classic Catalog link missing from record in Summon for Sierra via Summon customers
- Removed white blank bar from the bottom of the No Results page

© 2023 Ex Libris | Confidential & Proprietary



Summon 2023 Roadmap

Features under consideration

© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Planned Release Dates and Preview Environment

- Quarterly Releases—include release notes and preview period
  - February 1 Preview January 18
  - May 3 Preview April 19
  - August 2 Preview July 19
  - November 1 Preview October 18

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

© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Potential NERS Candidates for the 2023 Roadmap

These are the top candidates for Summon currently being reviewed by the Summon development team and the Enhancement Working Group



- Support subscriptions with embargoes or rolling cutoff dates
- Mandatory sender e-mail field in Summon
- Display all 5xx note fields as the default in Summon
- Improve the quick look to be more flexible
- Scheduling Summon reports
- Stop indexing EBSCO abstract results so that they no longer appear in Summon Full-Text
- Add "Include matches in Full Text" to "Some Suggestions to Improve Your Search"
- Ebook Usage Reports
- Remove identical links in Summon results for eBooks
- Do not allow eBook and Computer File records to match and merge with each other
- Ability to match language settings of Summon with 360 Link
- Include a "Library" facet and a "Location" facet
- Make the display order of Database Finder, custom panels, Topics, etc. on the right side more customizable
- Summon configuration screens should prompt you to save changes

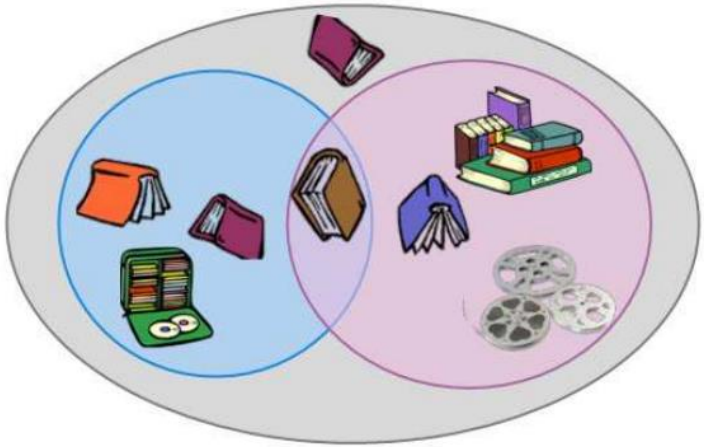
© 2023 Ex Libris | Confidential & Proprietary

ExLibris Part of Clarivate

Scopes for Summon Searches

Allow users to ‘pre-filter’ their search, limiting to a specific group vs. searching the full catalog

- Create scopes based on a variety of criteria, such as collections or content type
- Several search scopes can be configured per institution



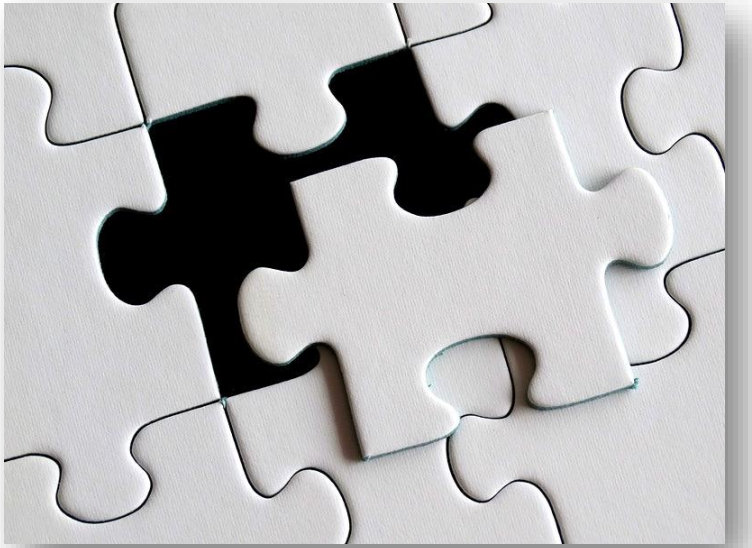
© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

LTI Support for Summon

Implementation of an LTI for Summon

- Ability to integrate Summon into Learning Management Systems (LMS) such as Canvas
- Develop LTI (Learning Tools Interoperability) Support



© 2023 Ex Libris | Confidential & Proprietary

NERS

ExLibris
Part of Clarivate

Google Analytics

Support for Google Analytics 4

- Improve reporting by updating Google Analytics to support current version
- Planned for the May release



© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Data Quality and Rights

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

© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Ongoing Improvements

Other	Accessibility
	Analytics

© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate



360 and Intota in 2023

Expanding Services and Enabling Innovation

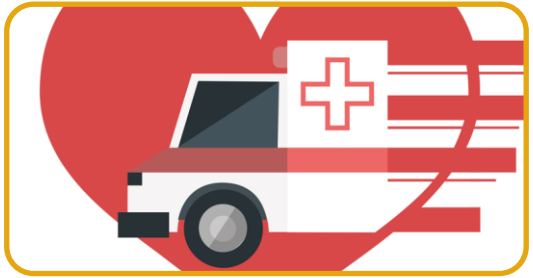
© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

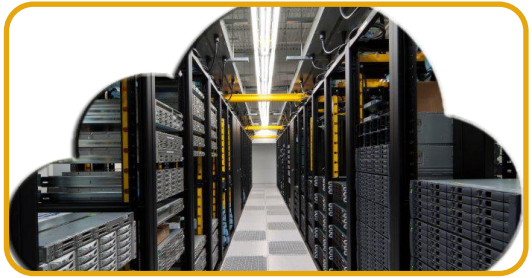
2022 Highlights Review



- Order EJP results by main title string
- Filter the EJP autocomplete suggestions
- MARC record %
- Upload 360 Link DB order list
- KBART file uploads



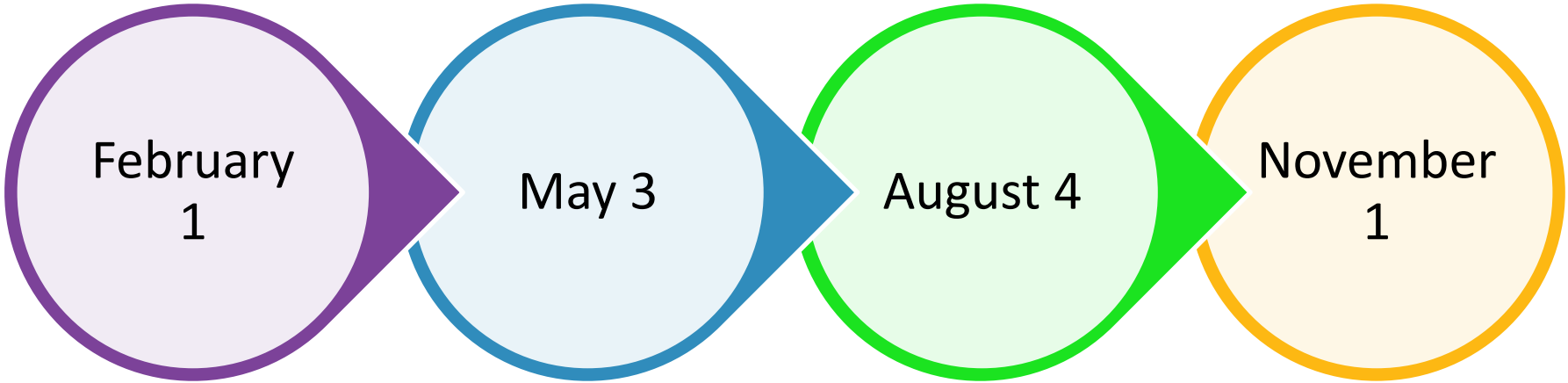
- ~200 customer-reported issues addressed
- Monthly linker releases
- Accessibility improvements
- CDI rights feed improvements
- KB Tools improvements



- Database software migration
- Migration to MFT
- Security enhancements

© 2022 Ex Libris | Confidential & Proprietary

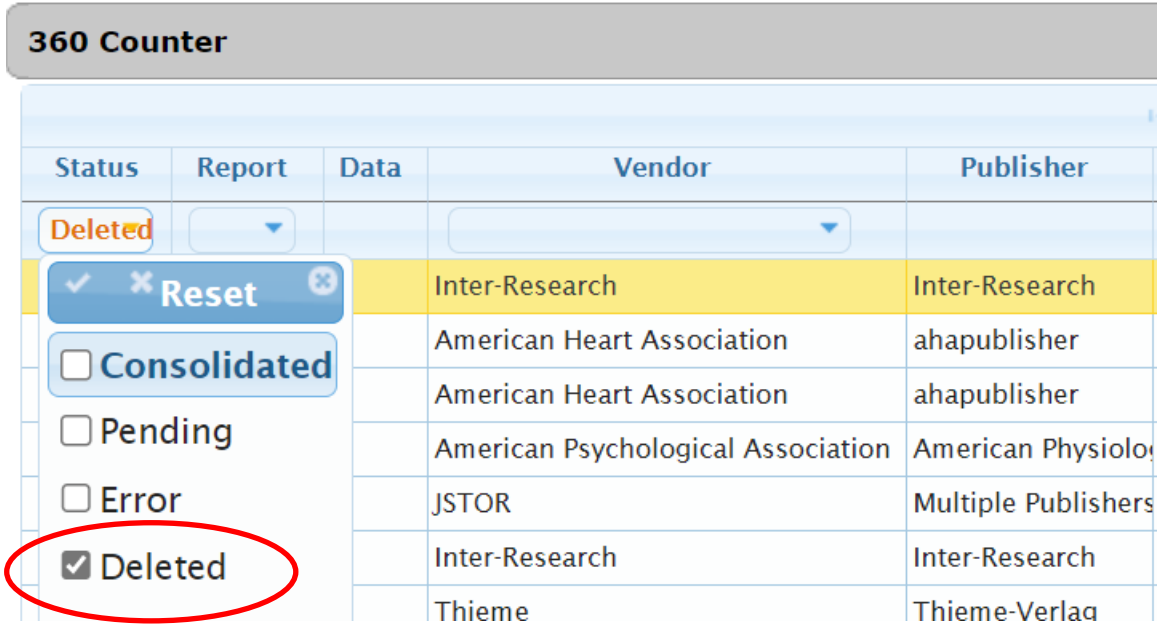
2023 Quarterly Release Dates



© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

2023 Q1: New COUNTER Report Status



- Easily see that a report's data was deleted
- Eliminate Support queries
- Understand a report's history

© 2023 Ex Libris | Confidential & Proprietary

ExLibris Part of Clarivate

2023 Q1: Reduce Change Records in 360 MARC

- After June database upgrade, there was a sharp increase in the number of changed records for unnormalized titles
- Improved Title and Publisher handling will
  - Stabilize unnormalized record generation in monthly runs
  - Result in fewer changed records
  - Decrease time needed to load MARC files into the ILS

© 2023 Ex Libris | Confidential & Proprietary

ExLibris Part of Clarivate

2023 Q1: Additional Improvements

- New linkers for Ebook Central, Nature, and Clinical Ethics.
- Disabled Crossref enrichment for titles when Summon is the referring source.
- Implement database upload capability in Intota
- Implement KBART file upload capability in Intota
- In Consortium Edition: Provider-specific linking parameters (e.g. EBSCO Authorization Settings) will be inherited by member libraries and display in the member library settings.

© 2023 Ex Libris | Confidential & Proprietary

ExLibris Part of Clarivate



Looking Ahead …

© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate



- Lower your TCO by providing auto-holdings management services for
  - Taylor & Francis
  - Springer
  - Elsevier
  - Wiley
  - Ovid
- Investigate integration with remote systems by expanding our API capabilities
- Address NERS ideas
  - Open Access indicator from the 360 KB
  - Include e-book titles in 360 Usage Statistics
  - Support identifier searching in the EJP even if the ID is not in the holding

© 2023 Ex Libris | Confidential & Proprietary

ExLibris Part of Clarivate



Community Engagement

© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Roadmap Webinar & Annual User Group Meetings

- 2023 Summon and 360 Services Roadmap Overview
  - AMERICAS/APAC: February 15 at 4:00 pm (San Francisco); February 16 at 8:00 am (Beijing); 9:00 am (Tokyo); 11:00 am (Sydney)
  - AMERICAS/EMEA: February 16 at 10:00 am (New York); 3:00 pm (London); 4:00 pm (Berlin)
  - AMERICAS: February 16 at 10:00 am (San Francisco); 1:00 pm (New York)
- We're looking forward to seeing you in person at ELUNA, IGeLU and IUG
  - ELUNA 2023 Annual Meeting: May 9-12 in Los Angeles, CA
  - IUG 2023: May 10-13 in Phoenix, AZ
  - IGELU 2023 Annual Meeting: September 11-14 in Leuven, Belgium



© 2023 Ex Libris | Confidential & Proprietary

ExLibris Part of Clarivate



Questions?

© 2023 Ex Libris | Confidential & Proprietary

ExLibris
Part of Clarivate

Thank you!

Brent.Cook@Clarivate.com
Amy.Pemble@Clarivate.com



ExLibris
Part of Clarivate