What's New for Summon & 360/Intota Services

July 2021



Ex Libris
a ProQuest Company





Brent D. Cook
Director, Product Management
Summon

© 2021 Ex Libris | Confidential & Proprietary

ExLibris
a ProQuest Company



- Review accomplishments
  - New Summon Functionality
  - 360/Intota August Release
  - Summon August Release
- A look ahead
  - 360/Intota Q4 Release
  - Summon Roadmap
- Questions?



Recent Summon Improvements

© 2021 Ex Libris | Confidential & Proprietary

Roadmap Areas and Highlights



SEARCH AND EXPLORING



OPEN SYSTEM



USER EXPERIENCE



LIBRARY EMPOWERMENT



CENTRAL DISCOVERY INDEX



ANALYTICS



ACCESSIBILITY



CONSORTIA

© 2021 Ex Libris | Confidential & Proprietary

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

Now Available:

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

Released: May 2021

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

© 2021 Ex Libris | Confidential & Proprietary

Recent Improvement to Print and eBook Facets

SEARCH AND EXPLORING

NERS

- Resolved issue with Summon over Alma configuration of feature reverting to “off”
- Improved process for including electronic materials in faceted results
- Implemented toggle between facets to prevent use in combination
  - To achieve an include or exclude of both formats, use the Book/eBook facet value under Content Type
- Remaining outstanding bug: Clear All Facets does not clear these facets

© 2021 Ex Libris | Confidential & Proprietary

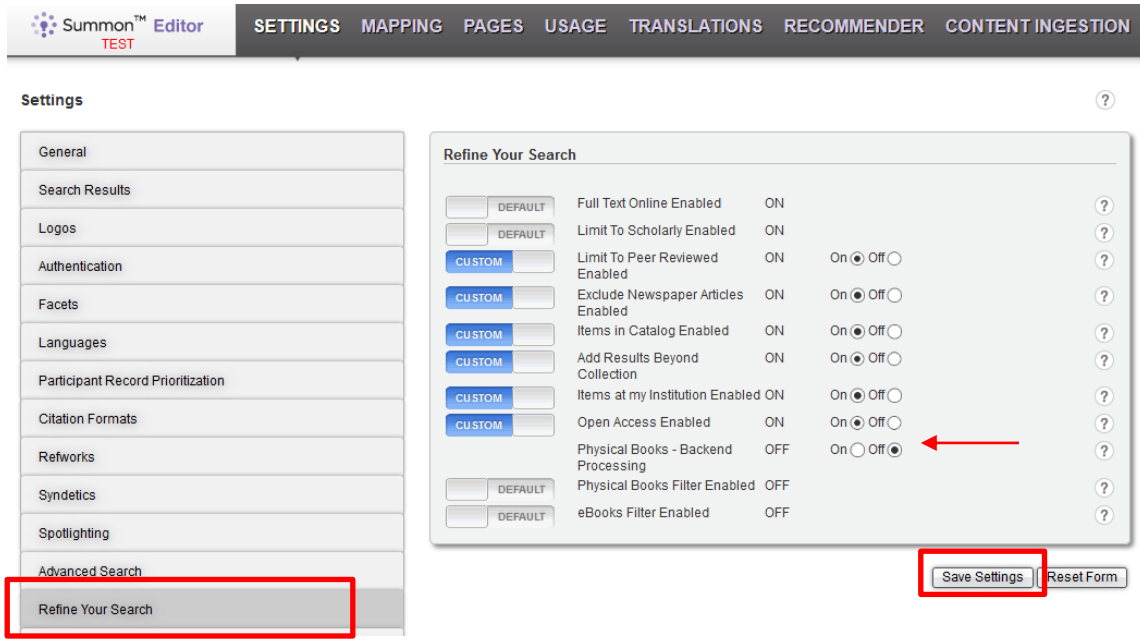
Separate Print from eBooks—Configuration

SEARCH AND EXPLORING

NERS

- 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

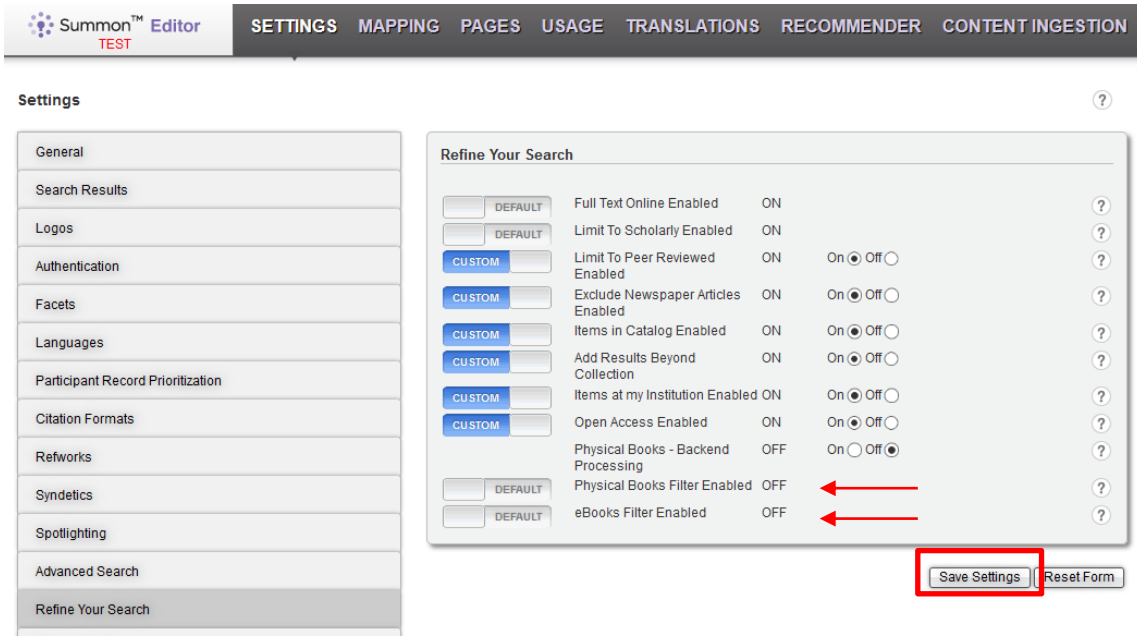
ExLibris a ProQuest Company

Separate Print from eBooks—Configuration

SEARCH AND EXPLORING

NERS

- 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

ExLibris
a ProQuest Company

Apply EZProxy to DOI in Preview Pane

OPEN SYSTEM

NERS

Now Available:

The ability to add EZproxy to DOI field link



Highlights:

- Proxy URL is no longer applied to Open Access links (previously this resulted in an error)

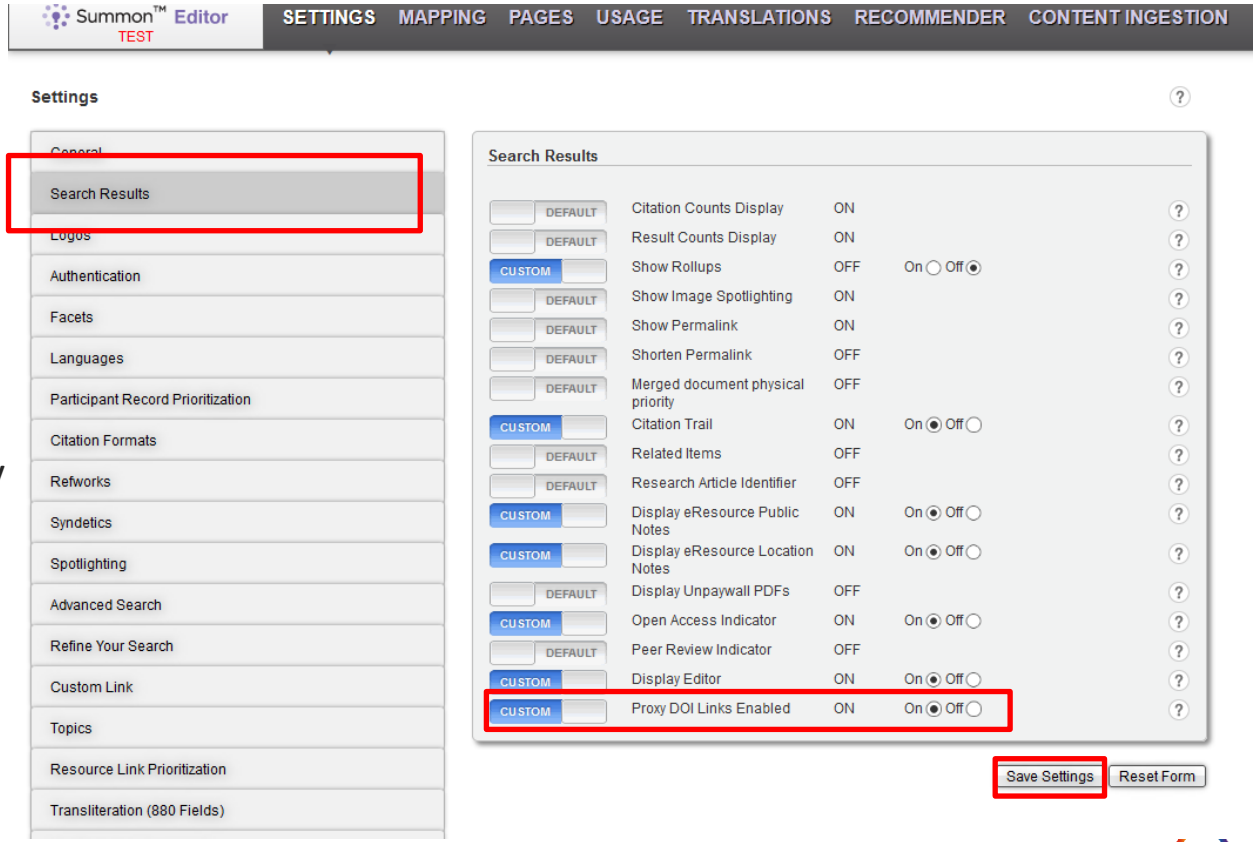
Making content more easily accessible

Released: 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

Other improvements and fixes

The following have been resolved or completed:

- Advanced search for DOI causes API parser error
- Summon usage statistics are not accessible
- Zero Result searches returns error
- Discontinued ability to create free individual RefWorks accounts at non-RefWorks institutions
- Chat images are not automatically resized
- Translations do not display in Summon Preview
- Add proxy when vendor = redirector
- HTML returned in permalinks for OpenAthens proxy
- Date facet update to correctly handle time zone differences
- Support Summon WeChat interoperability

© 2021 Ex Libris | Confidential & Proprietary



360 & Intota Services

August 4, 2021 Release Details

© 2021 Ex Libris | Confidential & Proprietary

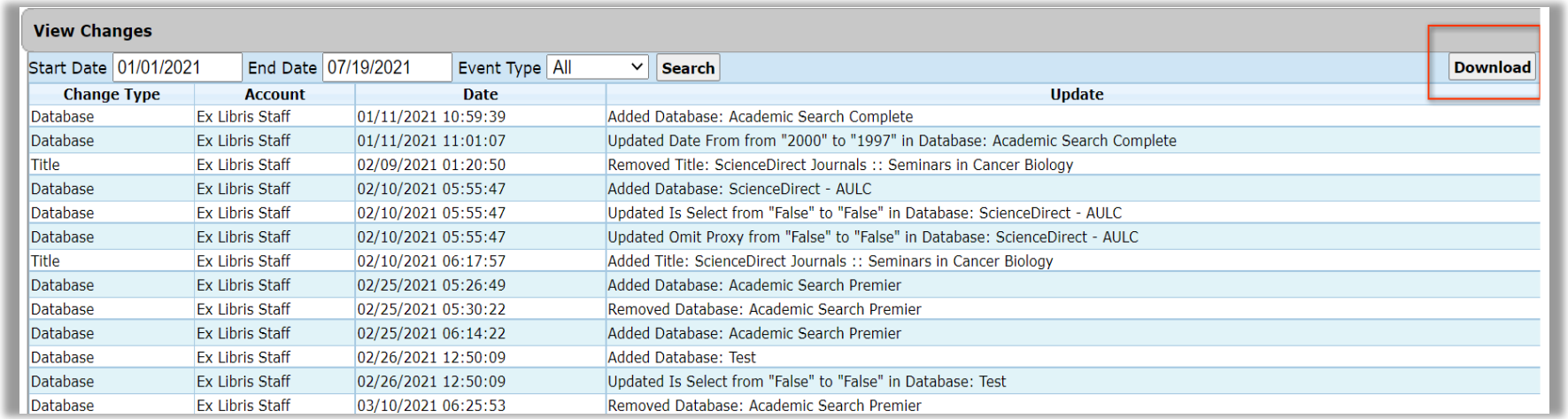
Q3 Highlights

- Ability to export details from the View Changes log
- Limit results to Videos Only in A-to-Z list
- Require a valid email address for ILL and “Report a Problem” forms in 360 Link
- Protection against potential security vulnerabilities identified by 3rd party analysis



© 2021 Ex Libris | Confidential & Proprietary

View Changes Download



View Changes

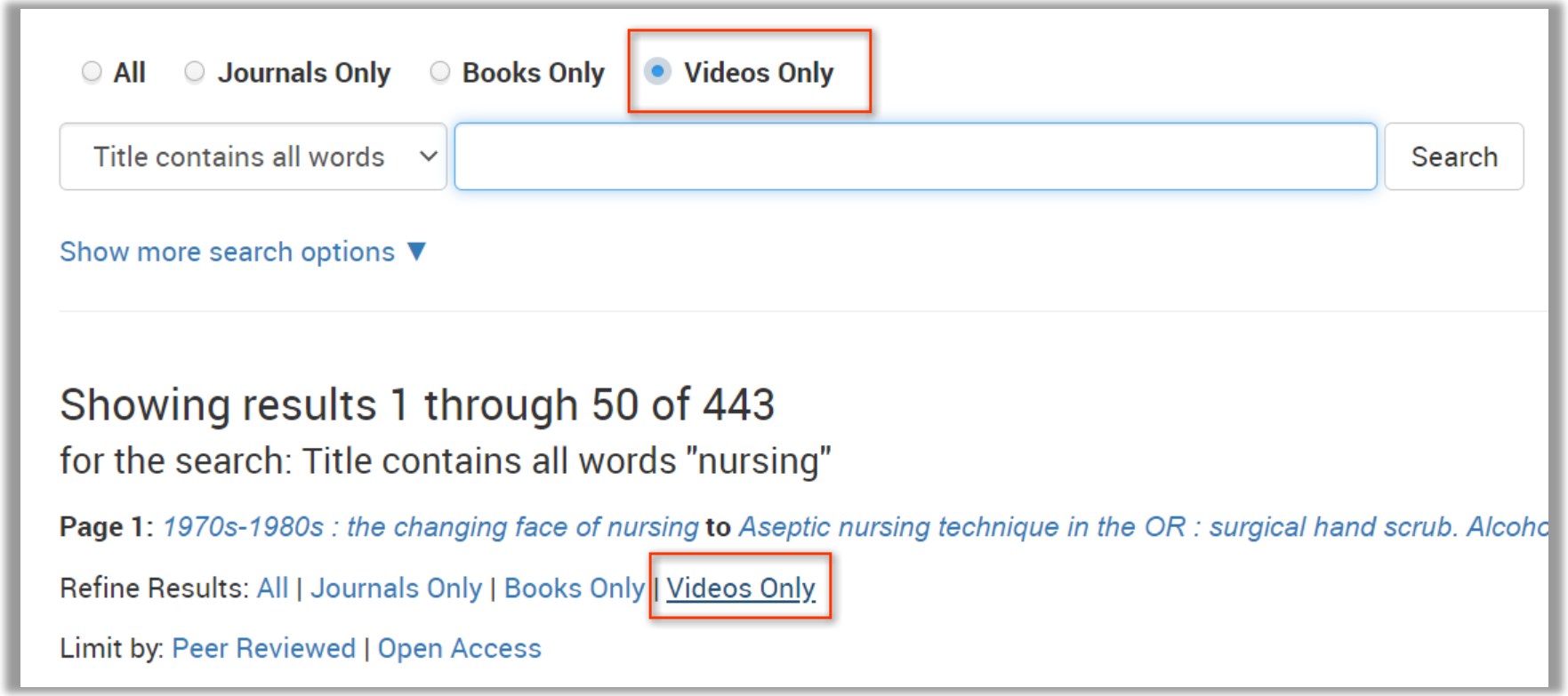
Start Date 01/01/2021 End Date 07/19/2021 Event Type All **Search** **Download**

Change Type	Account	Date	Update
Database	Ex Libris Staff	01/11/2021 10:59:39	Added Database: Academic Search Complete
Database	Ex Libris Staff	01/11/2021 11:01:07	Updated Date From from "2000" to "1997" in Database: Academic Search Complete
Title	Ex Libris Staff	02/09/2021 01:20:50	Removed Title: ScienceDirect Journals :: Seminars in Cancer Biology
Database	Ex Libris Staff	02/10/2021 05:55:47	Added Database: ScienceDirect - AULC
Database	Ex Libris Staff	02/10/2021 05:55:47	Updated Is Select from "False" to "False" in Database: ScienceDirect - AULC
Database	Ex Libris Staff	02/10/2021 05:55:47	Updated Omit Proxy from "False" to "False" in Database: ScienceDirect - AULC
Title	Ex Libris Staff	02/10/2021 06:17:57	Added Title: ScienceDirect Journals :: Seminars in Cancer Biology
Database	Ex Libris Staff	02/25/2021 05:26:49	Added Database: Academic Search Premier
Database	Ex Libris Staff	02/25/2021 05:30:22	Removed Database: Academic Search Premier
Database	Ex Libris Staff	02/25/2021 06:14:22	Added Database: Academic Search Premier
Database	Ex Libris Staff	02/26/2021 12:50:09	Added Database: Test
Database	Ex Libris Staff	02/26/2021 12:50:09	Updated Is Select from "False" to "False" in Database: Test
Database	Ex Libris Staff	03/10/2021 06:25:53	Removed Database: Academic Search Premier

- Long-standing enhancement request
- Downloads a .tsv file for the specified time period and event type(s)

© 2021 Ex Libris | Confidential & Proprietary

Limit Results to Videos Only in A-to-Z List



© 2021 Ex Libris | Confidential & Proprietary



Summon August Quarterly Release

August 4th

Preview beginning July 21

© 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: Quicklinks 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

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

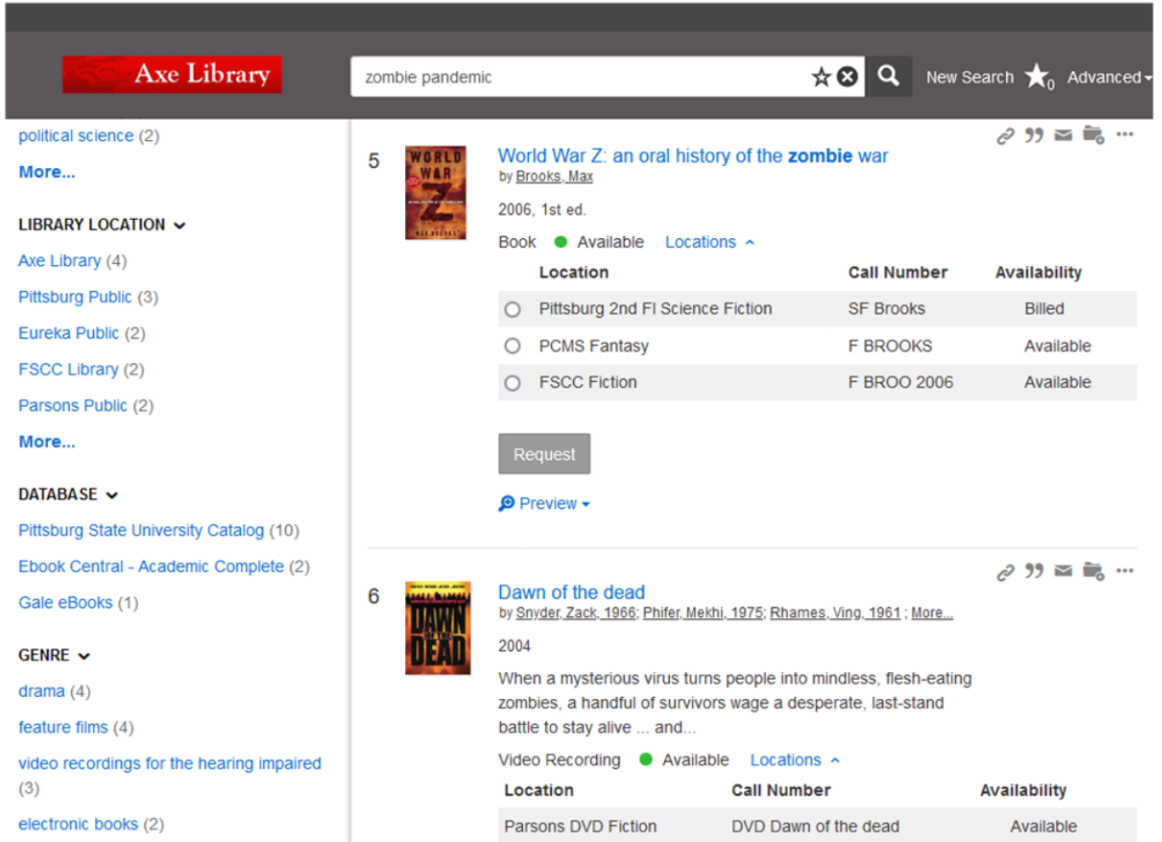
Release planned: Early Adopter Access H1; General availability H2

© 2021 Ex Libris | Confidential & Proprietary

Sierra via Summon

OPEN SYSTEM

- Login using CAS
- View availability and perform requests from the results page
- View library account information, including loans, requests, fines and fees



© 2021 Ex Libris | Confidential & Proprietary

To Prepare for General Release



OPEN SYSTEM

- If you are currently a Sierra customer and are interested in implementing this integration once it is generally available, you'll need to ensure you match the following requirements:
  - 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. If this is not installed, you need to submit a request to Innovative support.

© 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

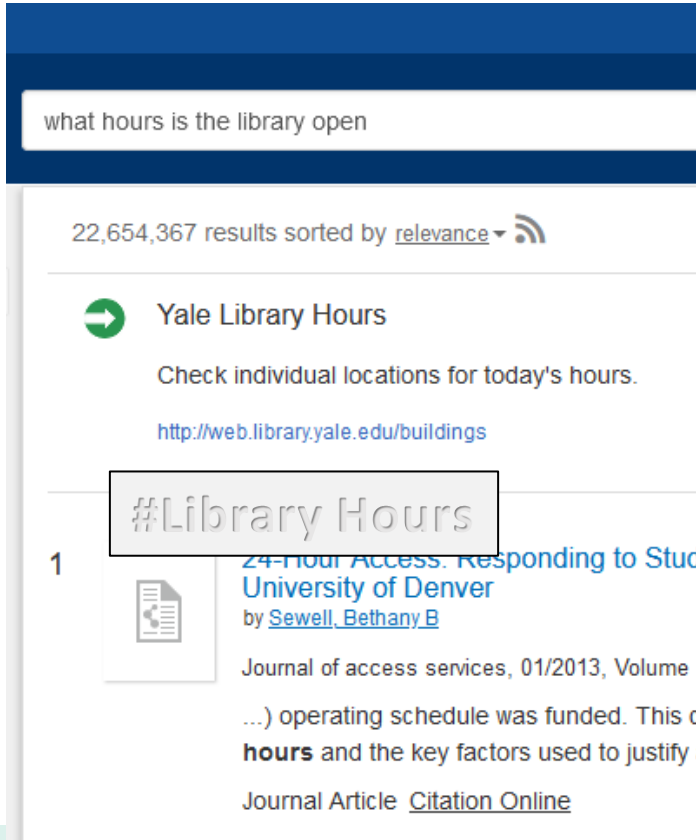
© 2021 Ex Libris | Confidential & Proprietary

New Matching for Best Bets

SEARCH AND EXPLORING

NERS

- Now Best Bets can make a match if a tag is present in a larger phrase
- Example matches:
  - “Job Search” now matches a “Job” tag
  - “Search for a job in my area” now matches a “job search” tag
- Use case not currently covered: partial keyword match
  - “Looking for a job in my area” would not match “job search”



© 2021 Ex Libris | Confidential & Proprietary

quicklinks 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 December

© 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 delayed: September 2021

© 2021 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company



A Look Ahead

© 2021 Ex Libris | Confidential & Proprietary



360/Intota/Client Center

November 3, 2021 Release Details

© 2021 Ex Libris | Confidential & Proprietary

Ex Libris
a ProQuest Company

Q4 Highlights

- Upload Database Details report to make bulk changes (e.g. Omit Proxy for OA databases, Public Database Notes)
- If a journal is in multiple databases, configure the A-to-Z List to display the database with the most recent coverage first
- Allow libraries to configure their own holdings URL replacements
- Limit A-to-Z List suggestions to subscribed holdings



© 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 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

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

Final Functionality May Vary from Mockups



USER EXPERIENCE

Disclaimer:

Note that the following slides contain mockups, not screen captures of a functioning page

- Final user interface will likely vary from mockups due to:
- Feedback from usability and accessibility testing
- Any development constraints (code/system/performance may not support all desired functionality)
- Differences in browsers and operating systems

…And a variety of other contributing factors

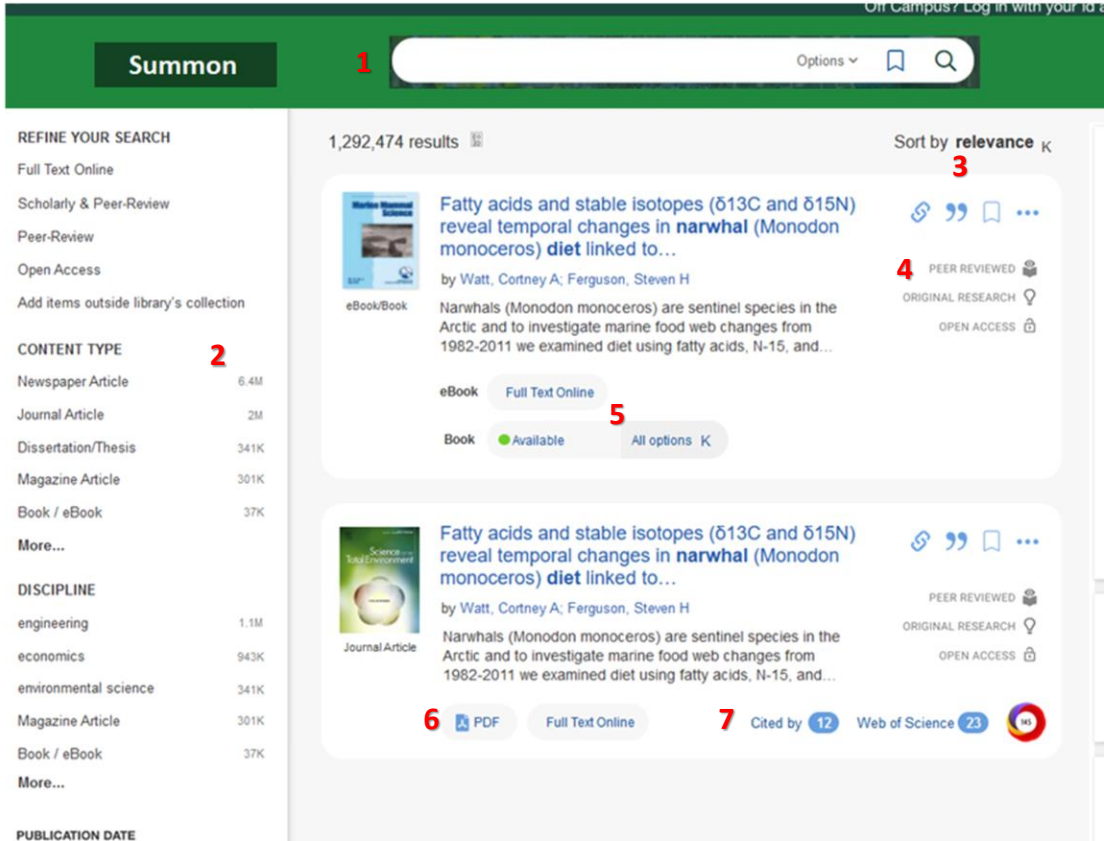
© 2021 Ex Libris | Confidential & Proprietary

Summon UI Refresh

USER EXPERIENCE

Potential Improvements:

1. Add stylistic improvements, like rounded edges
2. Improve facet interactions; rounding facet counts
3. New icons (bookmark replaces folder icon)
4. Better organize identifiers
5. All links for a resource are available via an all options link
6. QuickLink to PDF or Full Text online
7. Better presentation of related descriptors



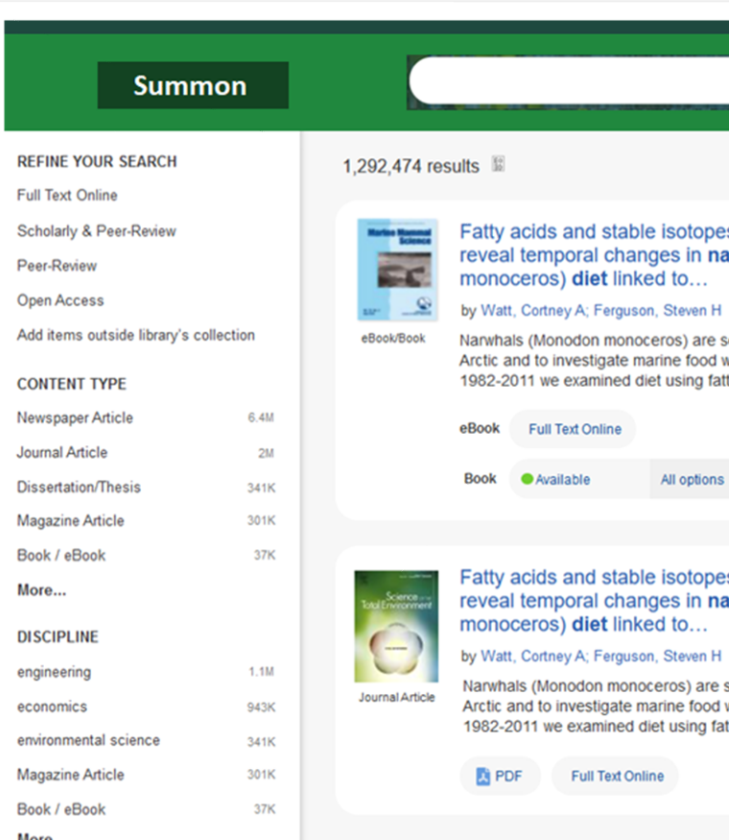
© 2021 Ex Libris | Confidential & Proprietary

Facet improvements

USER EXPERIENCE

Potential Improvements:

1. Improve implementation of Exclude
2. Improve More Facet Pane interactions
    - Apply button not intuitive
    - Include/Exclude
    - Scroll interactions
3. Label improvements



© 2021 Ex Libris | Confidential & Proprietary

Better organization for brief result

USER EXPERIENCE

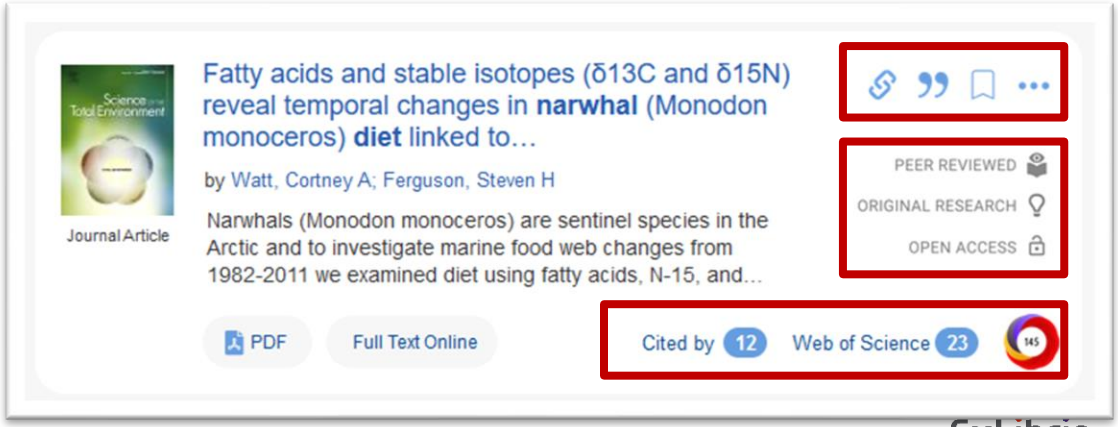
Highlights:

- New icons
- Better organization of labels and references

Before



After



© 2021 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Display All Links in Results

LIBRARY EMPOWERMENT

NERS

What's Coming:

Enhance in Summon results page to display all full text links subscribed in the knowledgebase



Highlights:

- Provide multiple sources for the end user to choose
- Configurable by institution

Maximize the use of the library's resources and ensure users successful access to content

Release planned: December 2021

© 2021 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Article Links

USER EXPERIENCE

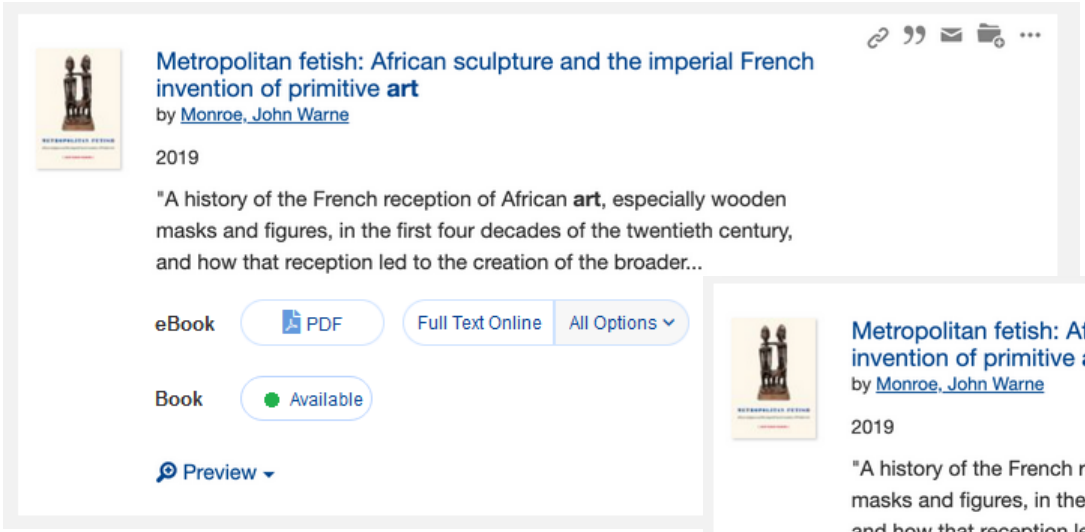


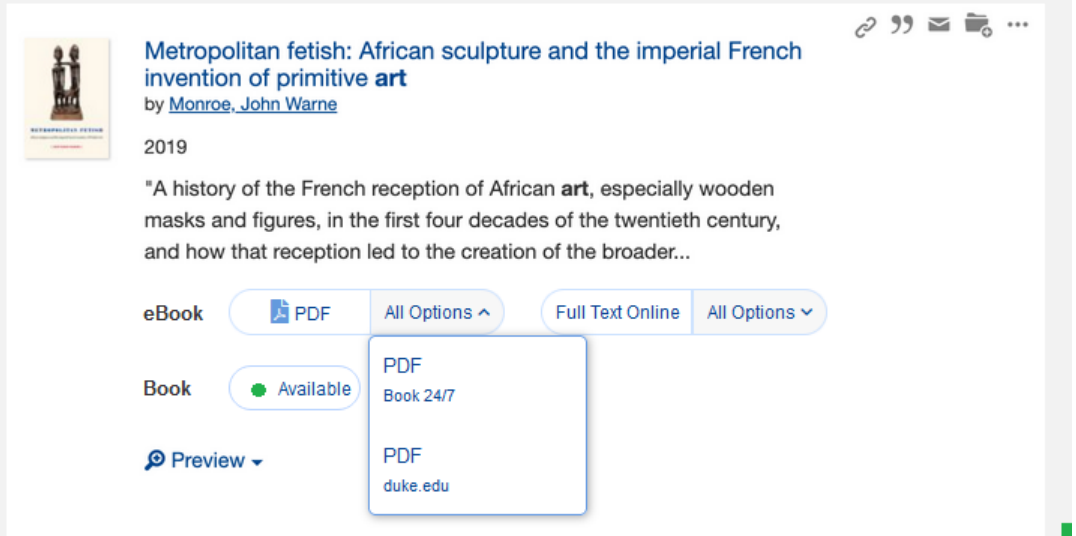
© 2021 Ex Libris | Confidential & Proprietary

EXLIBRIS
a ProQuest Company

Book Links

USER EXPERIENCE





© 2021 Ex Libris | Confidential & Proprietary

Exact Search—Additional Fields

SEARCH AND EXPLORING

NERS

What's Coming:

Add the functionality to do an exact search on certain fields



Highlights:

- Ability to select "exact match" on certain fields on the advanced search page
- Possible fields to include: Call Number, ISBN, ISSN, DOI, OCLC Number and Patent Number

Faster, more targeted discovery of known items for end users

Release planned: December 2021

© 2021 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Improved Corrected Spelling (Did You Mean?)

USER EXPERIENCE

NERS

What's Coming:

Modification of Did You Mean? functionality to meet user expectations

Highlights:

- Automatic replacement of misspelled word with corrected spelling
- Ability to search on original terms as a secondary search

Release planned: December 2021



Meet user expectations for their search experience, returning expected results more quickly

© 2021 Ex Libris | Confidential & Proprietary

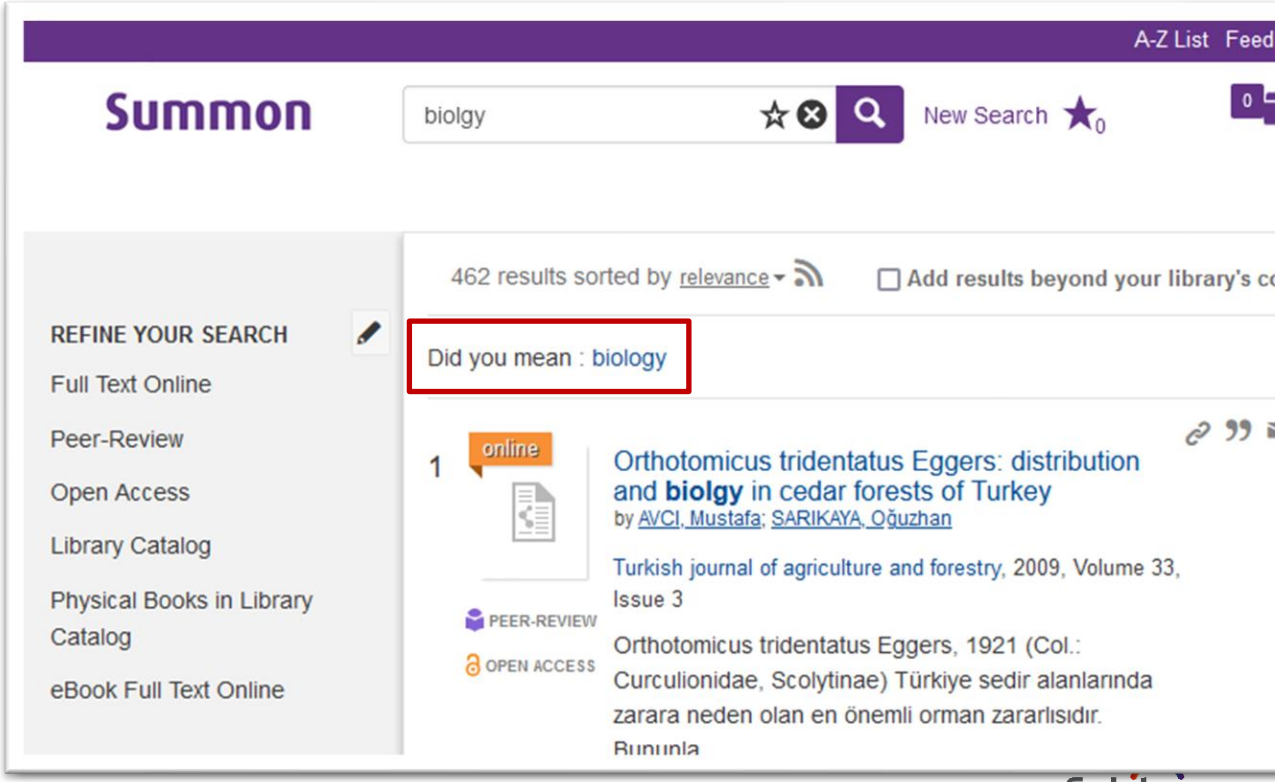
Improved Corrected Spelling (Did You Mean?)

USER EXPERIENCE

NERS

What's Coming:

- Automatic search based on corrected term
- Ability to execute original search via secondary link



© 2021 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Improved Database Recommender Management Tools

LIBRARY EMPOWERMENT

What's Coming:

Improve DB Recommender activation process, ranking and curation of sources



Highlights:

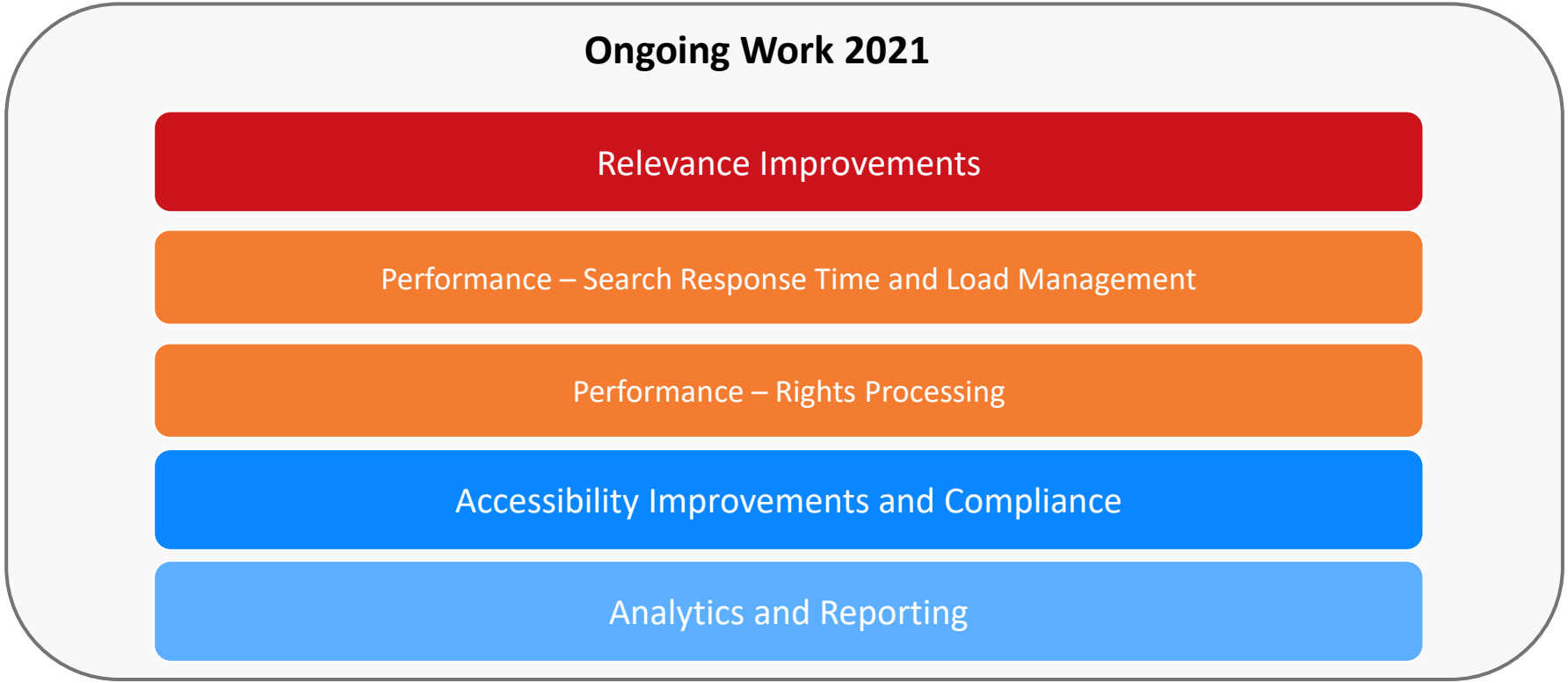
- Batch processing for DB Recommender changes
- Librarian can assign priority to listed databases

Better ability to manage and expose what is most relevant

Release planned: December 2021

© 2021 Ex Libris | Confidential & Proprietary

Summon Roadmap Highlights



© 2021 Ex Libris | Confidential & Proprietary



Upcoming Webinars and Community Engagement

© 2021 Ex Libris | Confidential & Proprietary

ExLibris
a ProQuest Company

IGeLU 2021 Virtual Conference and Developers' Day



- Dates: Aug 23 – Aug 26
- Registration: free, open now
- Platform: Zoom
- Program: being finalized
- Session Proposals still being accepted until July 24
- Website: https://conferences.igelu.org/conference2021

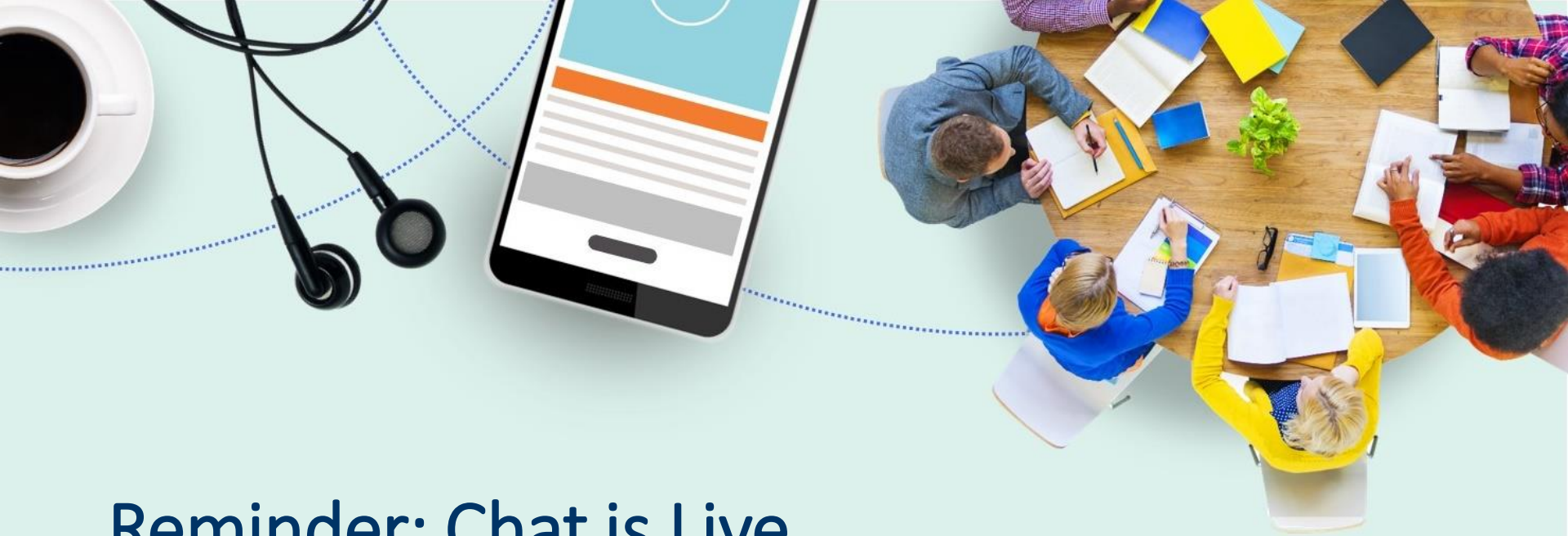
© 2021 Ex Libris | Confidential & Proprietary

Upcoming Webinars



- ELUNA Learns
  - Wednesday sessions start on July 21 – “Access Services”
  - https://el-una.org/meetings/eluna-learns-2021/
- Upcoming Customer Success session – register here
  - What We’ve Learned From the Pandemic: Key Strategies for Summon Customers (July 29)
- Access point for all Summon recordings visit our Summon Knowledge Center webinar page

© 2021 Ex Libris | Confidential & Proprietary

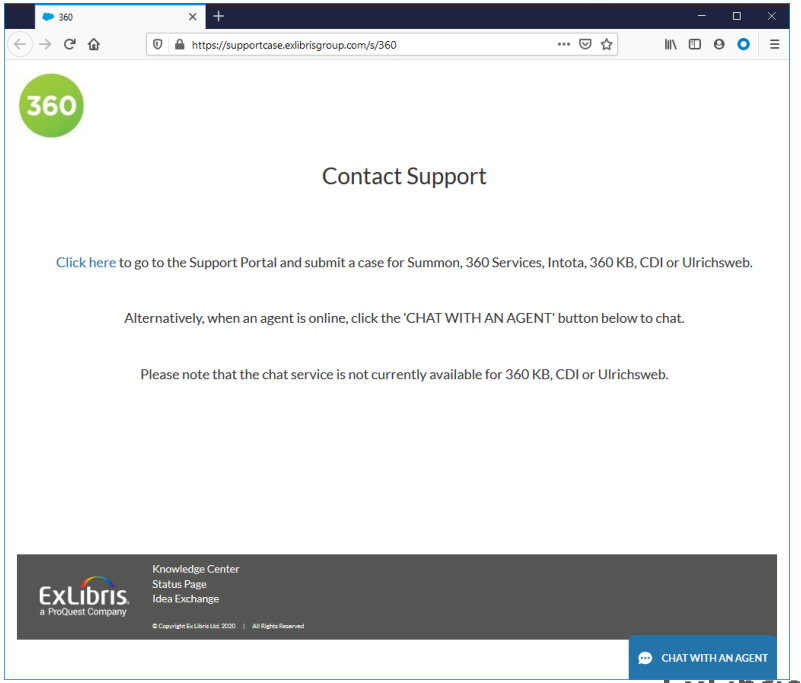


Reminder: Chat is Live

ExLibris
a ProQuest Company

Extended Chat Hours Now Available

- We have expanded hours available for online, **Live Chat Support** for Summon, 360, and Intota service questions.
- The 1-1 online chat is now available Monday through Friday during the periods of:
  - 9:00 – 16:00 CEST (Berlin)
  - 9:00 – 17:00 PDT (San Francisco)

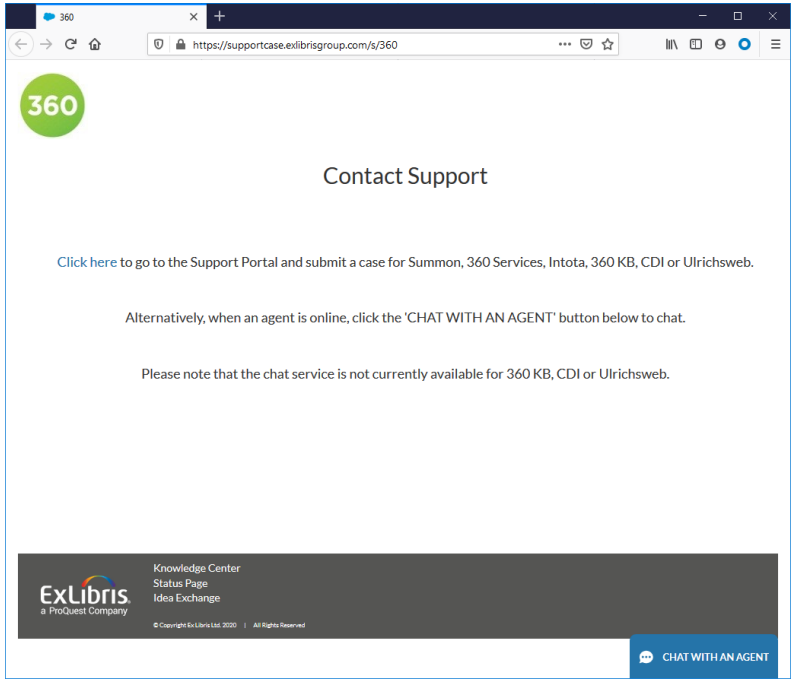


© 2021 Ex Libris | Confidential & Proprietary

ExLibris
a ProQuest Company

How to Use Chat

- You can access Live Chat Support through the embedded “Contact Us” links located in the 360 Client Center and Intota.



- You can also bookmark and visit https://supportcase.exlibrisgroup.com/s/360 or https://supportcase.exlibrisgroup.com/s/intota.

© 2021 Ex Libris | Confidential & Proprietary

ExLibris
a ProQuest Company



Thank you!

Brent.Cook@exlibrisgroup.com

ExLibris
a ProQuest Company