

What's New with Summon & 360/Intota Services

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Summon

- Review accomplishments
  - New Summon Functionality
- A look ahead
  - Summon Roadmap Review
- 360 and Intota Services
- Questions?



Review Recent Accomplishments

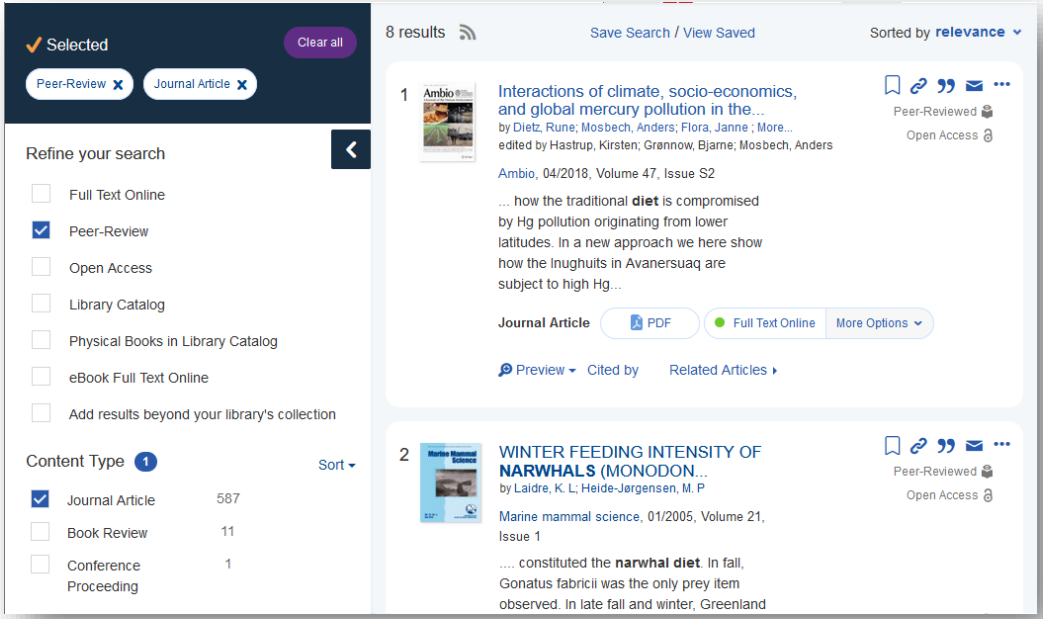
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The “New” Summon Experience

A Refreshed User Interface Optimized for Usability

- Stylistic updates
- Facet Improvements
- Brief result display improvements
- Link display

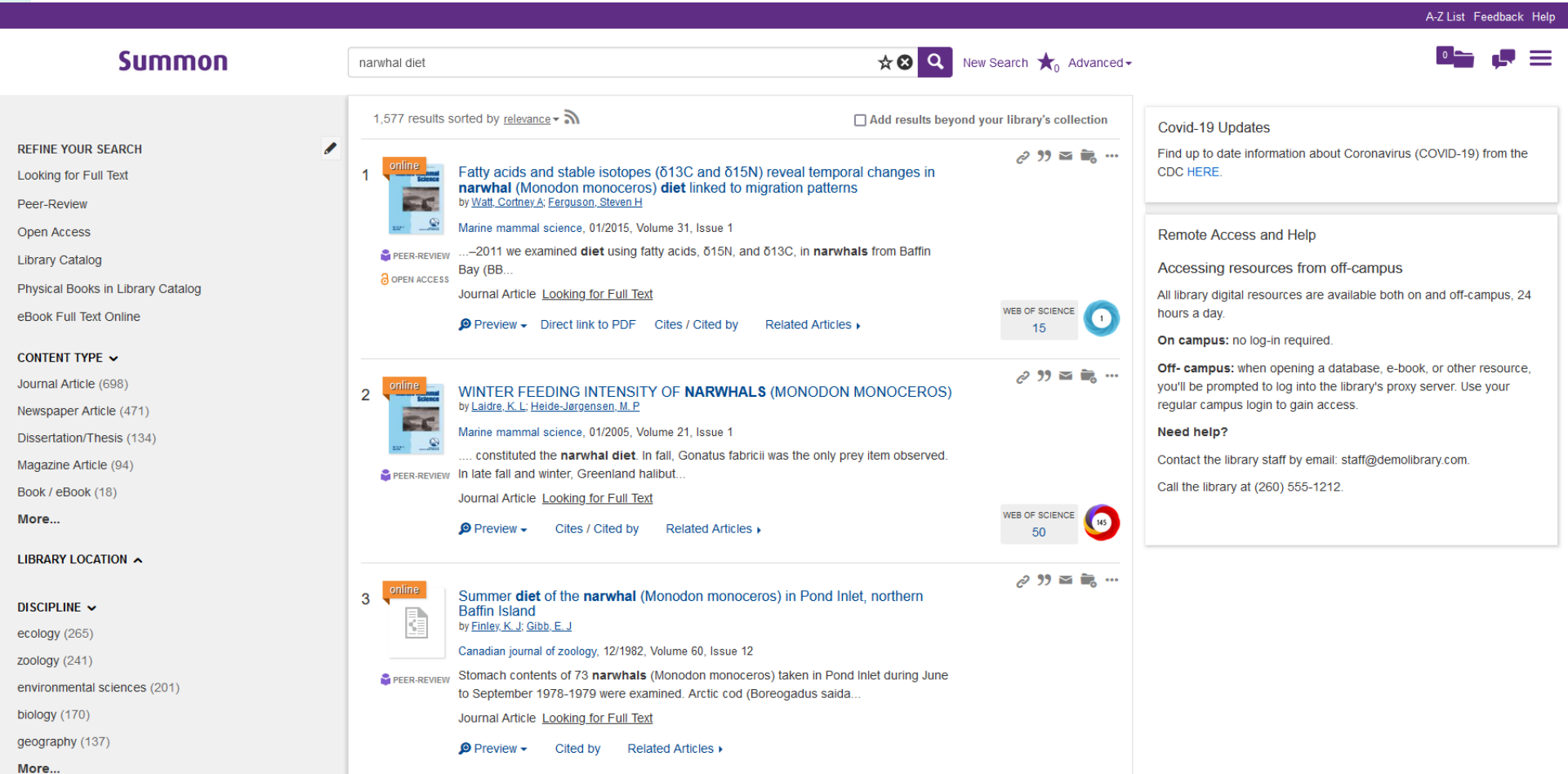


2022 H1

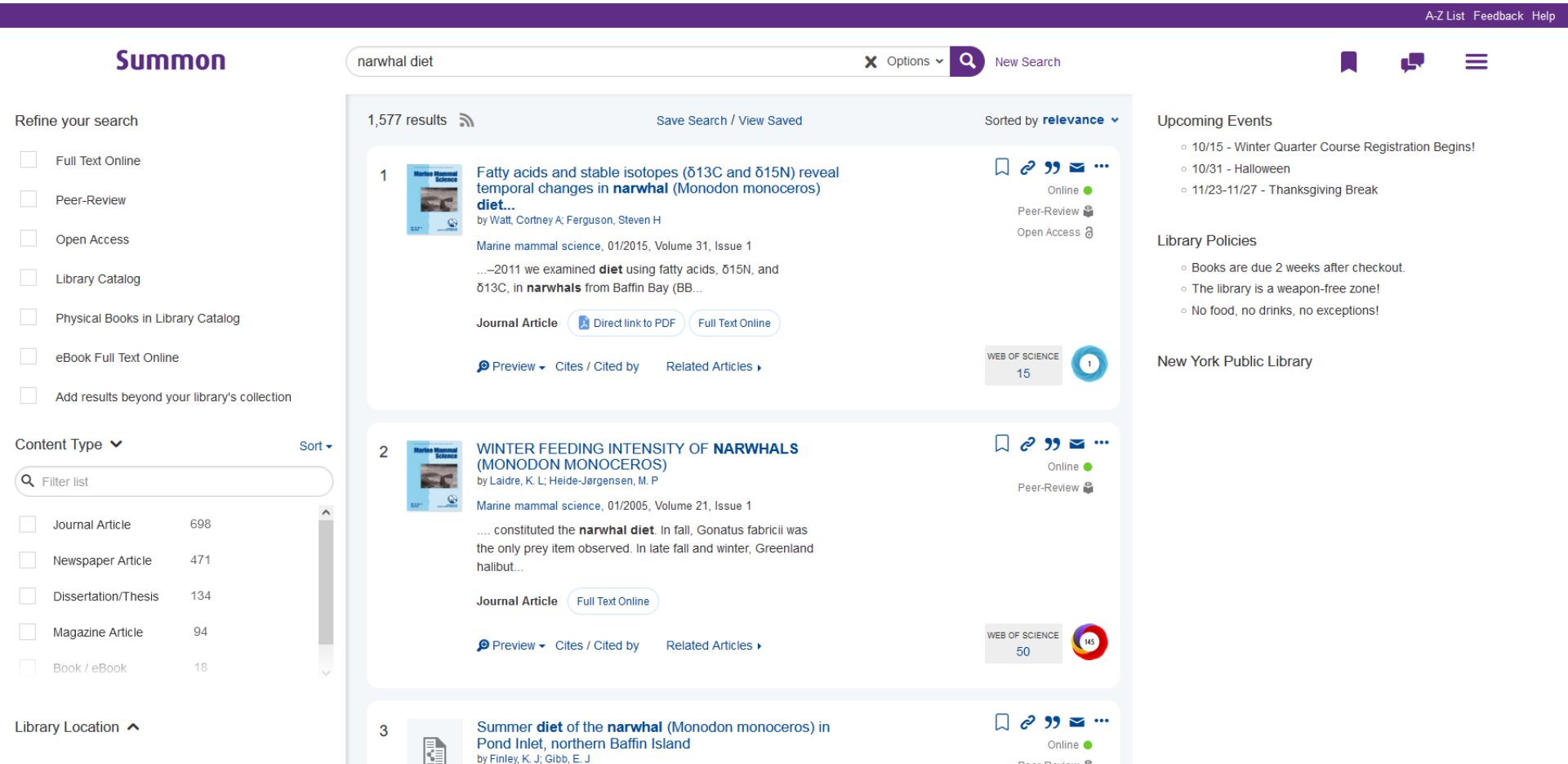
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Summon Results Page: Before

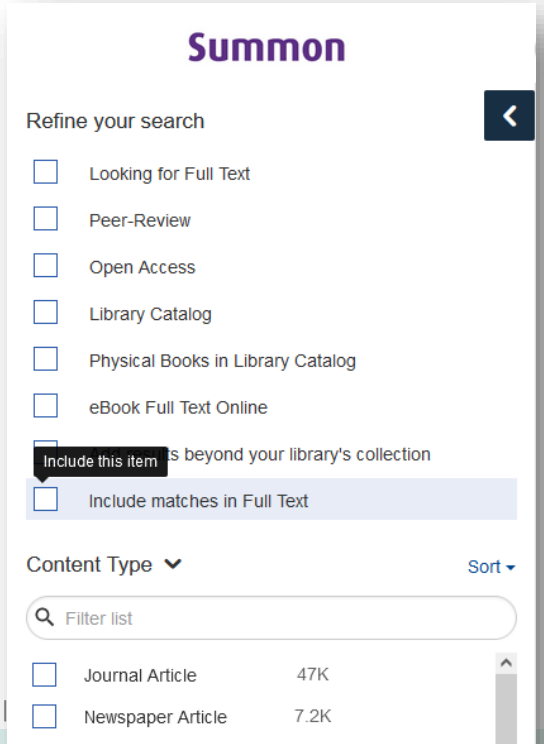


Summon Results Page: After



Optional Full Text Searching

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



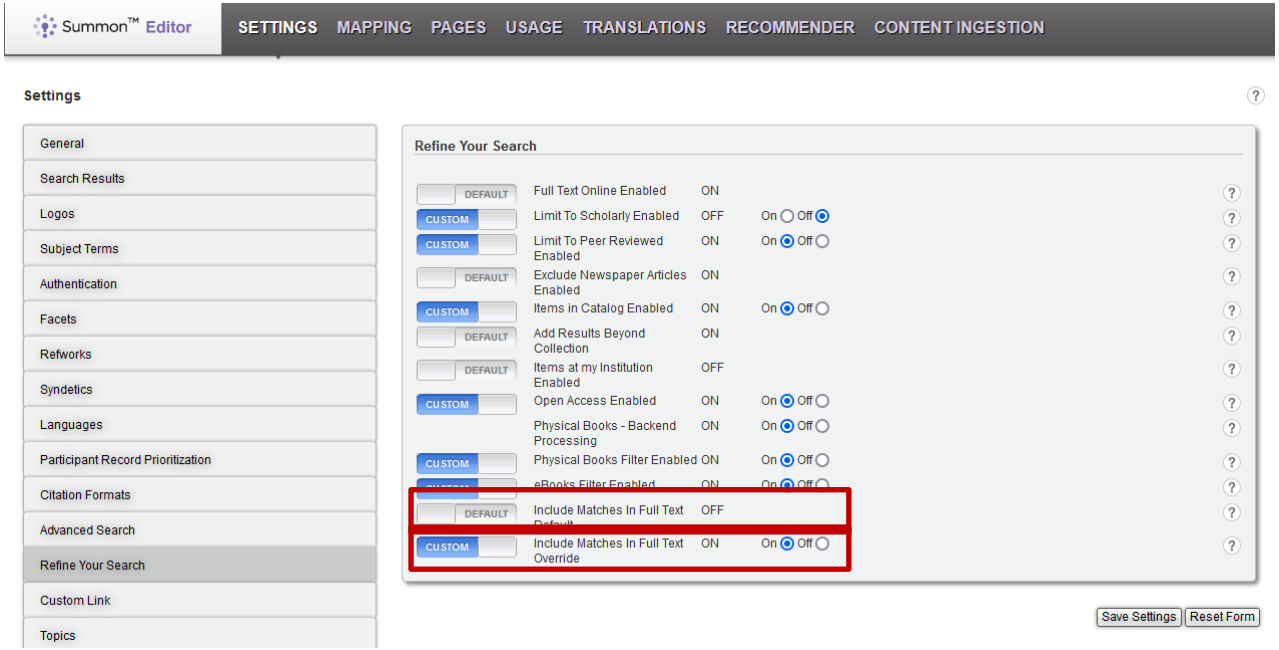
- Faster, more targeted results for the end user
- Reduce long tail
- Faster response time
- Ability to expand results set by searching full text

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Optional Full Text Searching



To Configure

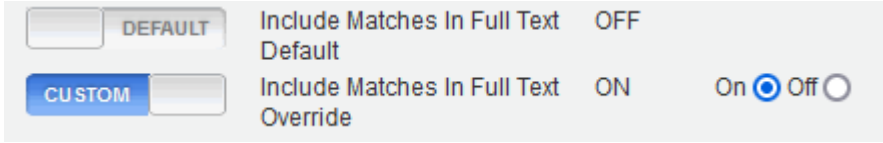
- In the Summon Admin Console under Settings > Refine Your Search
- “Include matches in Full Text Default” configures your default Summon search behavior
- “Include Matches in Full Text Override” configures the full text facet

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Optional Full Text Searching

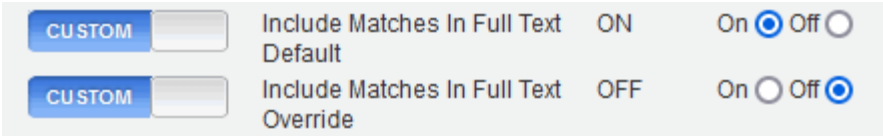
Best performance and most options

- 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 search



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August Release

Currently in the Preview Environment

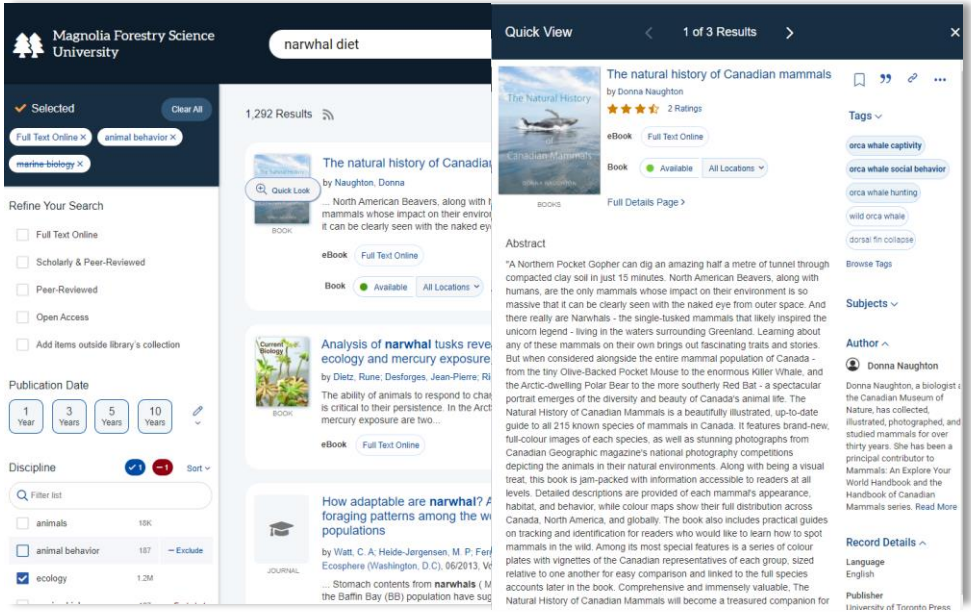
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Summon UI Refresh: Quick View / Preview Pane

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



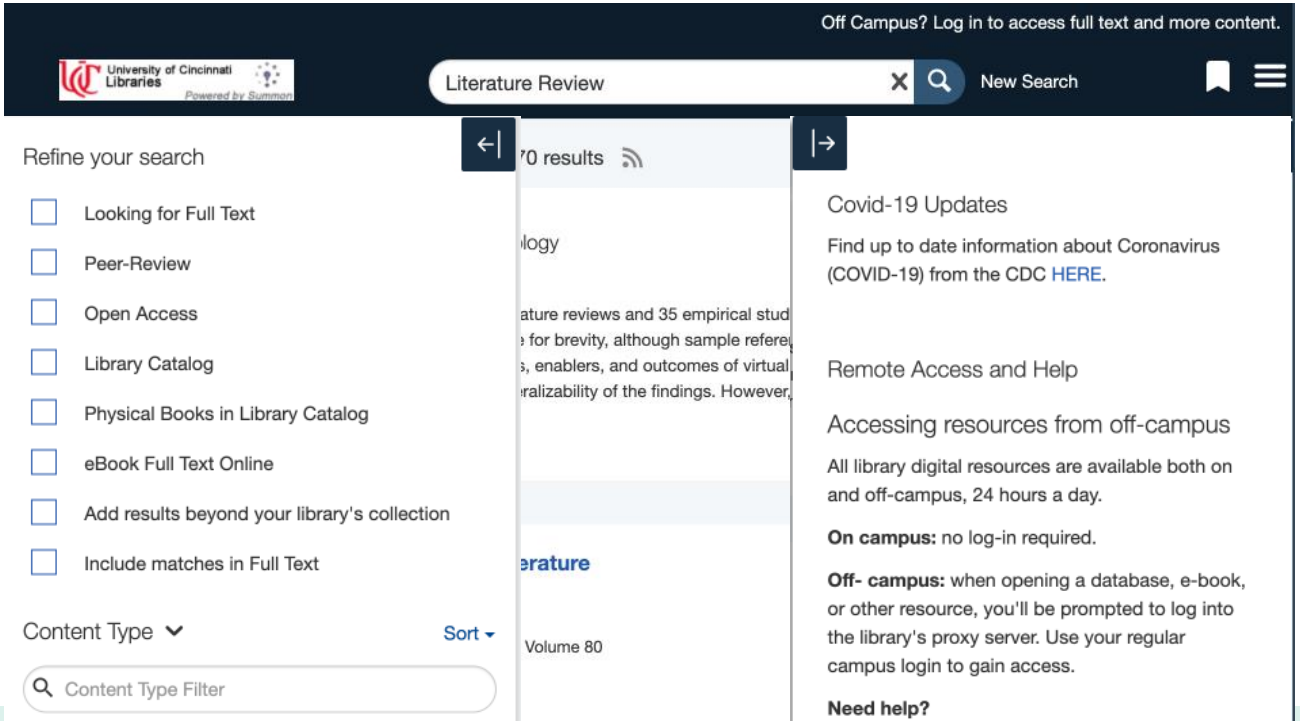
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Summon UI Refresh: Small Screen Layout

Improve access to facets and custom panels in tablet and mobile view

- Improve access and readability for facets and custom panels on smaller screens

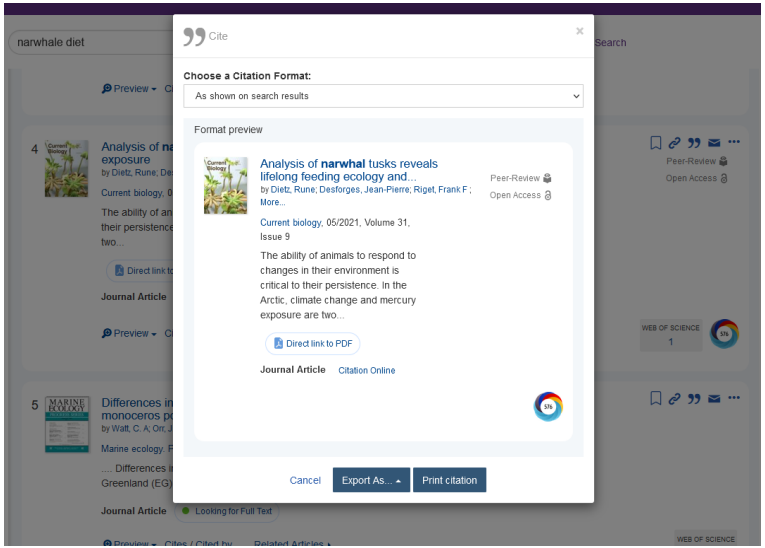


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Custom Citation Styles

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



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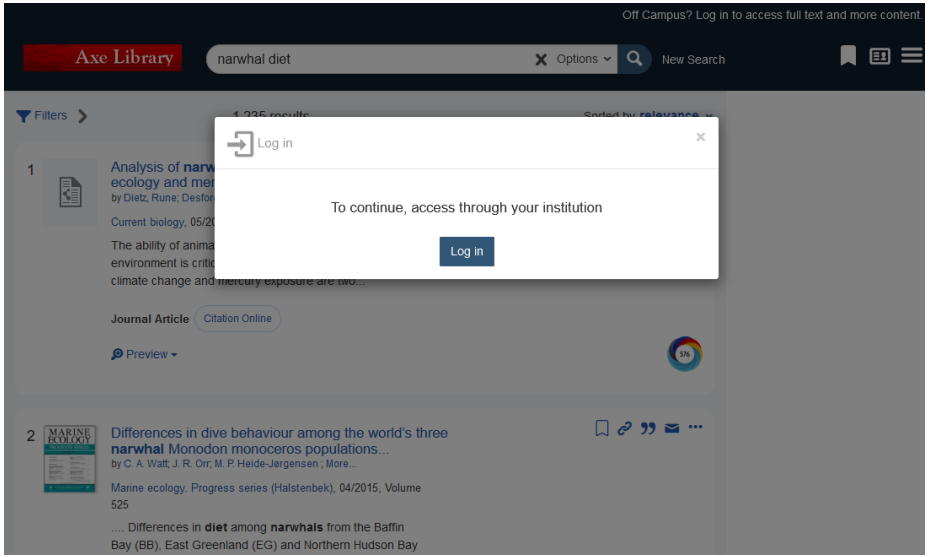
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Sierra via Summon: SAML Support

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



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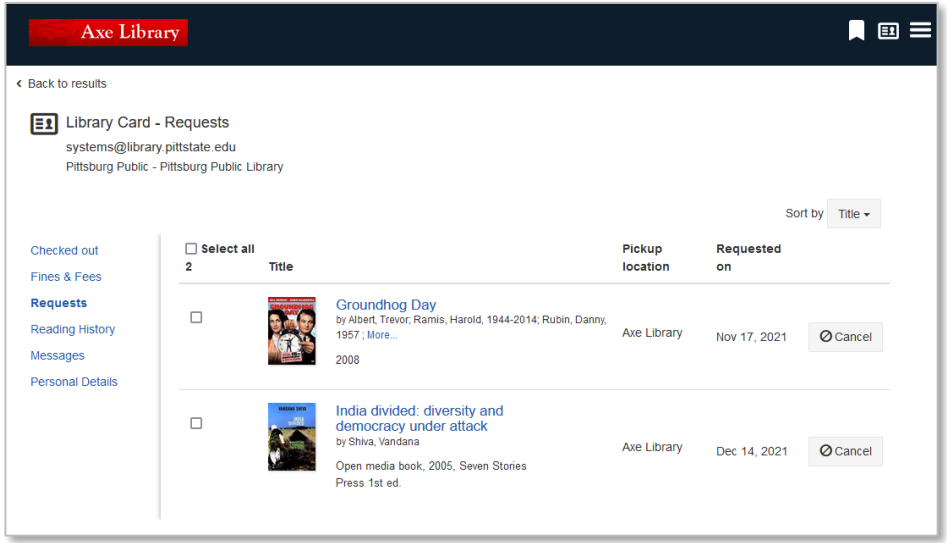
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Sierra via Summon: My Library Card Improvements

Provide patrons access to a My Library Card page customized for your institution

- Ability to configure elements displayed in My Library Card page
- Additional functionality



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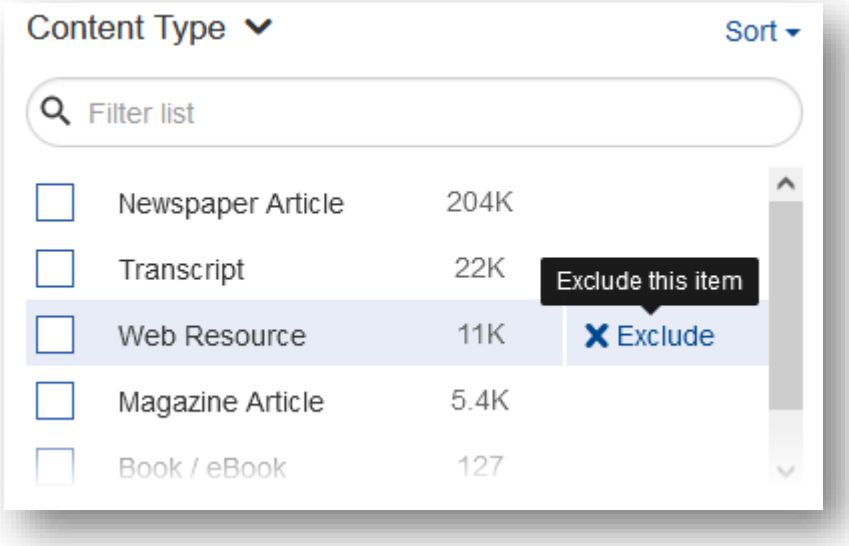
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Better Identify Online Newspaper Articles

Refine Content Type Web Resource to Identify Online Newspaper Articles

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



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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)

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Summon 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) • Accessibility

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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

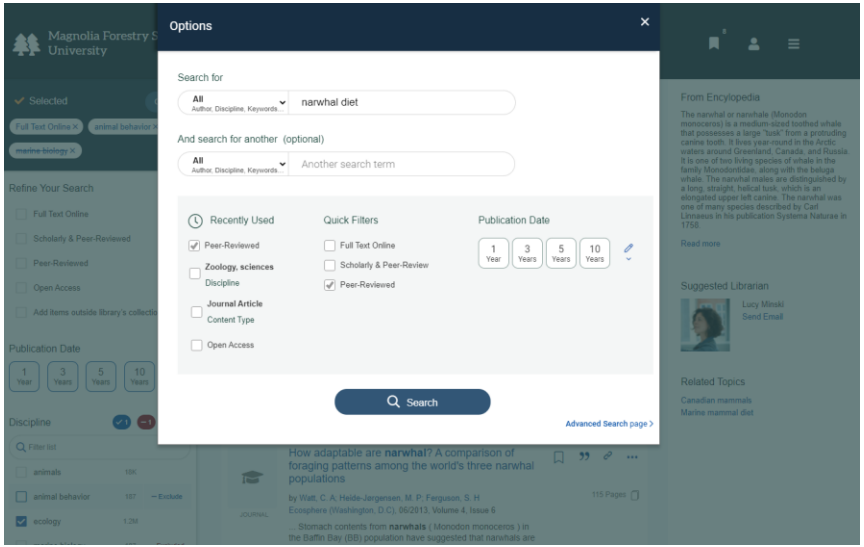
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Summon UI Refresh: Advanced Search

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



2022 H2

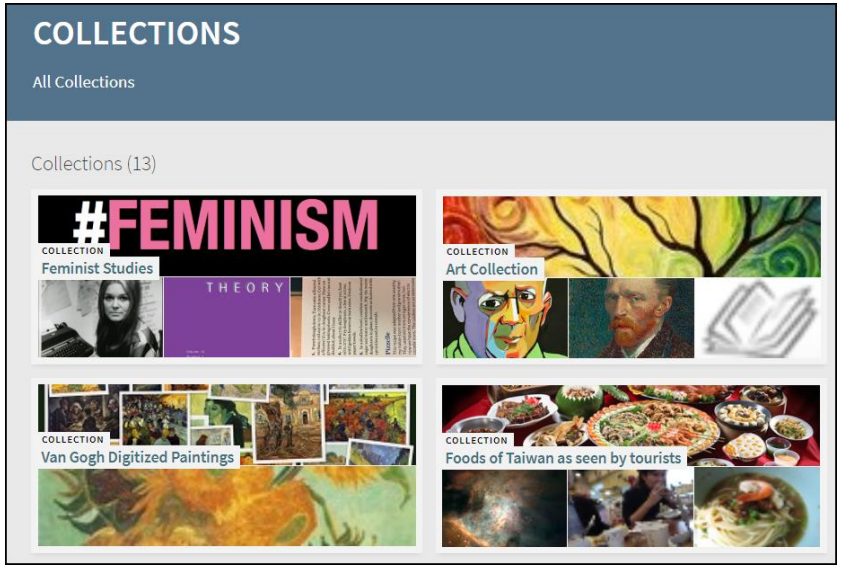
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Collection Discovery

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



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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)

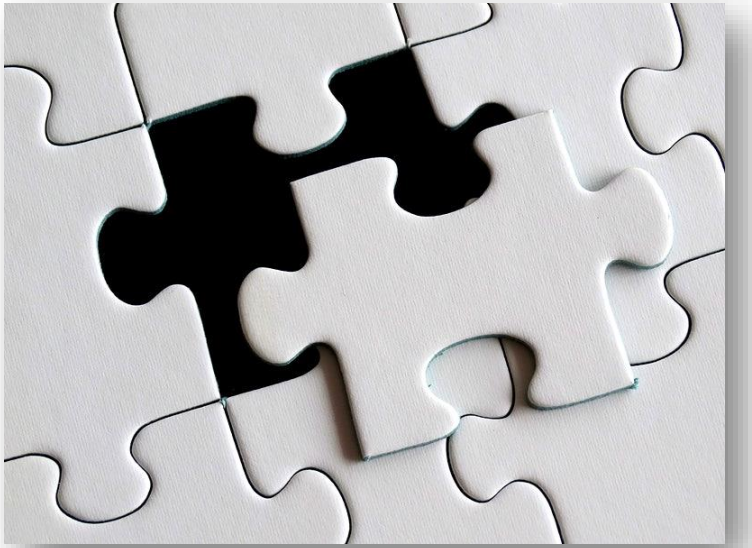
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LTI Support for Summon

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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Linking to Full Text

Linking to Full Text

- Improve Open Access Linking — NERS
- Provide Detailed Journal Coverage Dates — NERS
- Quicklinks — DX

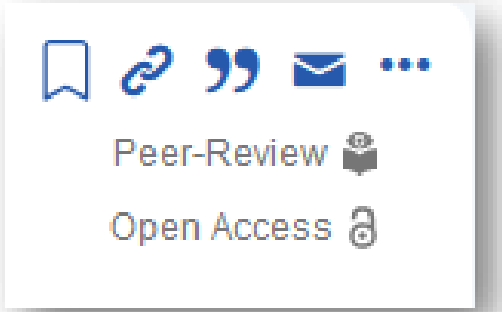
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Open Access Linking

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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Quicklinks

DX

Quicker access and fewer clicks with direct linking to HTML/PDF pages

- 17 providers already supported, with over 1.5 billion records
- Additional providers planned throughout 2022

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

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
Bloone	Journals Content under https://bloone.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
Thieme	All journal content besides conference proceedings under https://www.thieme-connect.de/produc...rnals/journals	PDF, HTML
IEEE	Content under https://ieeexplore.ieee.org	HTML
Mary Ann Liebert, Inc.	Journals under https://www.liebertpub.com/	PDF, HTML
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Data Quality and Rights

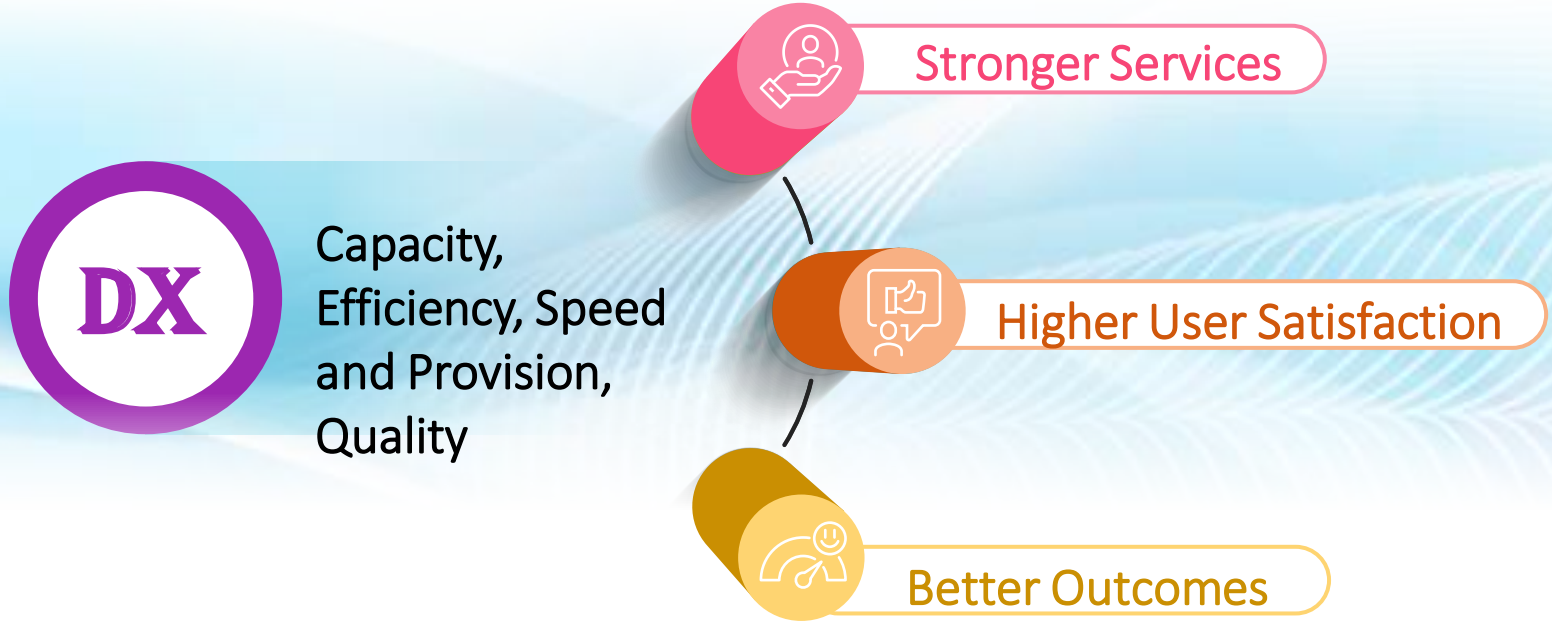
Data Quality and Rights	CDI Rights Processing Improvements - Enhanced Performance and Improved Matching 
	Ongoing Improvements in the Merged Record 

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Data Excellence (DX)

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



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Ongoing Improvements

Other	Accessibility
	Analytics

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360 and Intota: Mid-Year Check-In

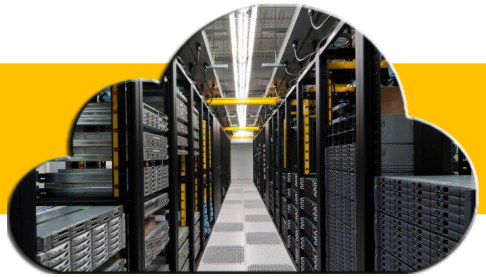
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360 and Intota Services 2022 Roadmap

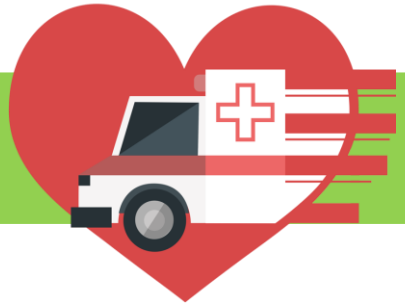
Community Requests and NERS





Infrastructure

Continuous Support



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Quarterly Release Dates

- February 23
- June 17
- August 3
- November 2



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2022 H1 Highlights: Community Requests

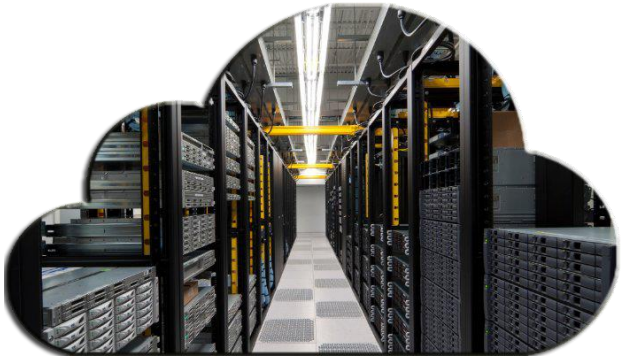
- Filter the EJP autocomplete suggestions
- Change EJP sort order to favor main title over alternate titles
- Show the MARC record availability percentage at the database level
- 360 Link: Bulk Upload of Database Order list



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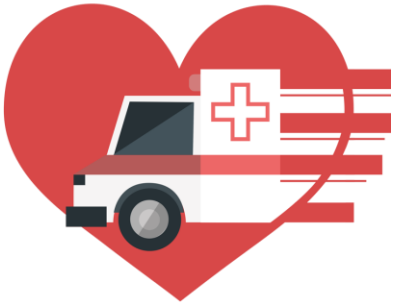
2022 H1 Highlights: Infrastructure

- Database management software migration
- Pending: Intota Assessment migration to OAS
- Migration from FTP to MFT
- Ongoing tools maintenance



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2022 H1 Highlights: Continuous Support



SUSHI harvest conflicts

IEDL refinements to increase linking accuracy

Auto-holdings title conflict

Linker syntax changes

Show terms of use in EJP

VPAT updates

Add OVID databases to global exclude list

Updated CKC articles

Improve CDI rights feed

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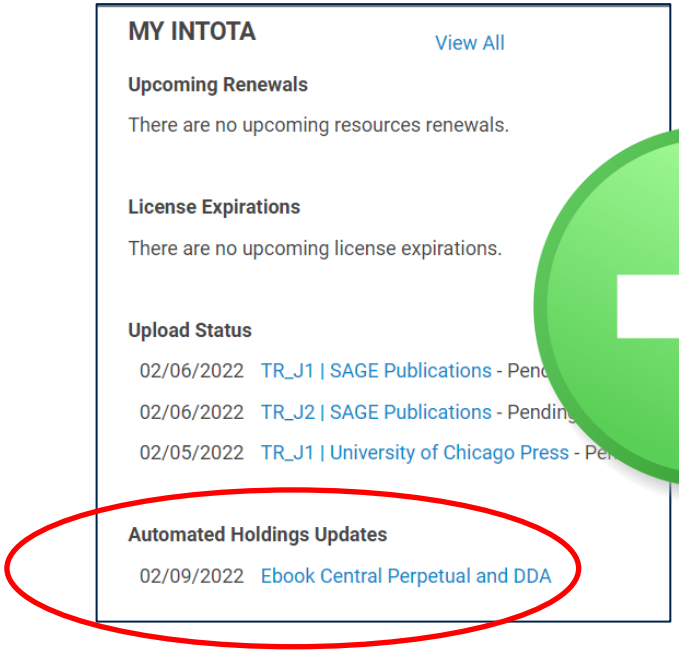
August Maintenance Release

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Integrate NISO Recommended Practices for KBART Automation

Expand auto-holdings support beyond Ebook Central

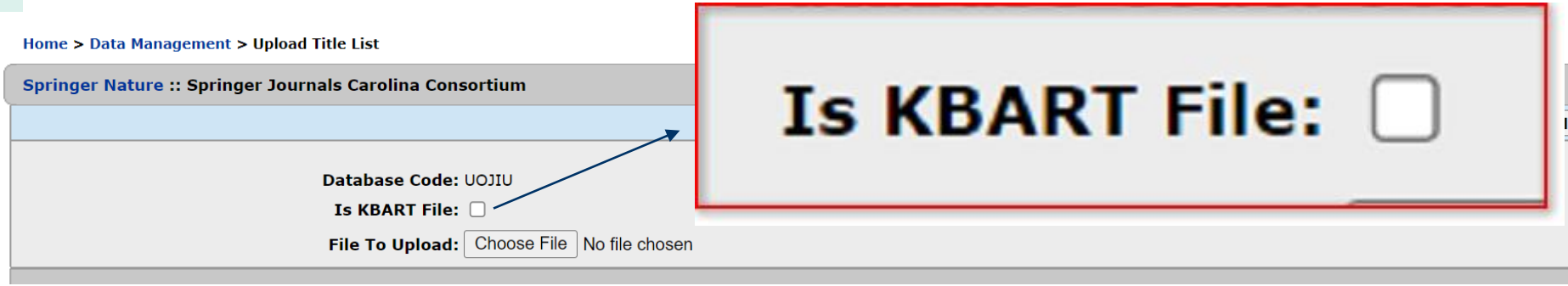


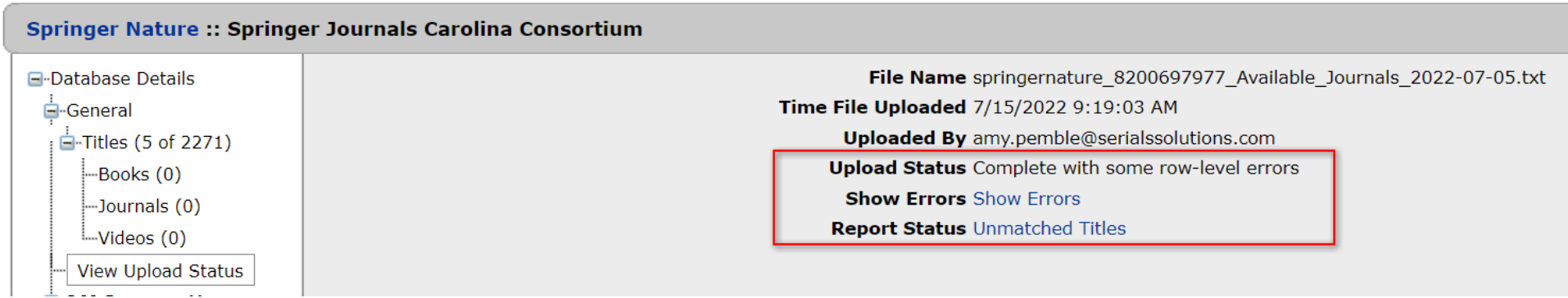


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Phase 1: Uploading KBART-formatted files





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Next Steps

- Vet with the community and enhance processing
- Integrate into Intota
- Implement for Library Specific Databases
- Begin planning for automation
  - Documentation
  - Infrastructure (e.g. MFT)
  - Liaise with Provider Outreach

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Community Engagement

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Idea Exchange

- Add your ideas to the Idea Exchange
  - Both 360 and Summon ideas can be added
- Ideas will be used for 2022 NERS voting



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Upcoming Events of Interest

- General webinar
  - Open Systems in the Age of Library Services Platforms: A Conversation with Marshall Breeding
    - July 26 @ 2:00 pm EDT
    - Registration: here
- Summon customer sessions
  - More 2022 programming being scheduled
- IGeLU
  - Annual Conference, Developer's Day, Knowledge Day*
    - September 12 – 15
    - Cardiff, United Kingdom
    - Registration: here

**Knowledge Day is an in-person event only*



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Questions?

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Thank you!

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