

Ex Libris
Part of Clarivate

What's New in Summon & 360/Intota

August 2024 Release

Amy Pemble

July 2024

Agenda

- Review release calendar
- Review recent Summon, CDI, & 360 developments
- Highlight Summon August release features
- Highlight 360/Intota August release features
- Community engagement

Ex Libris
Part of Clarivate

2024 Release Dates for Summon and 360/Intota

	Quarterly Release Date	Preview Release Date
☑	February 7, 2024	*No preview required*
☑	May 1, 2024	April 17, 2024
	August 7, 2024	July 24, 2024
	November 6, 2024	October 23, 2024

- Summon and 360/Intota have the same quarterly release dates
- Summon maintenance releases occur on the first Wednesday of all other months
- There are no preview environments for maintenance releases

Q2 2024 Summon Release Highlights

- Auto-Enable Quicklinks
- NERS: Bulk export search results (Preview)
- NERS: Display full title on mouseover
- Ability to search Notes by default (via UI and API)

Q3 2024 Summon Release Highlights

- NERS: Save items between sessions
- NERS: Bulk export search results in Production
- NERS: Replace Summon auto-scroll with pagination
- NERS: Verbatim search operator for exact matching

Ex Libris
Part of Clarivate

Save Items Between Sessions

Allow users to permanently save citations to their account

Details

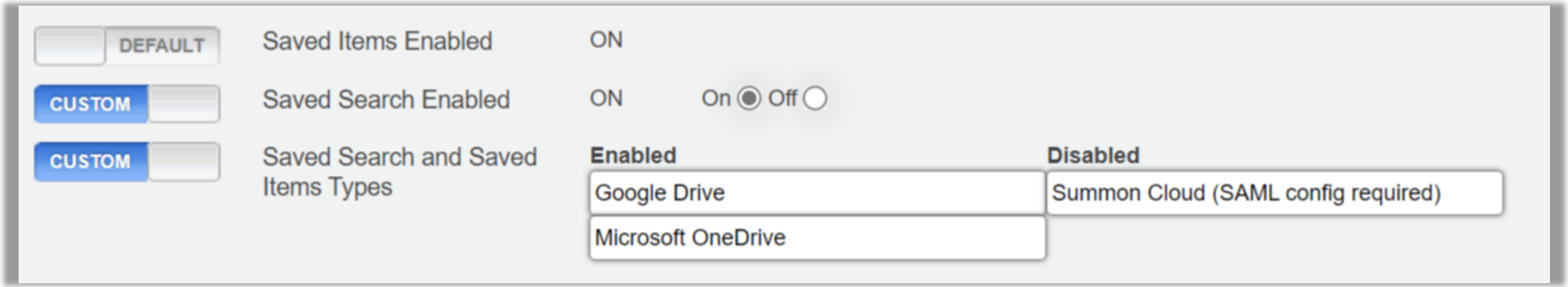
- Currently Saved Items are retained only for the current Summon session
- Users that authenticate via Google, Microsoft, or SAML will be allowed to retain Saved Items permanently
- Google & Microsoft users' items will be saved to those clouds
- SAML users' items will be saved to the Ex Libris cloud

Save Items Between Sessions

Allow users to permanently save citations to their account

Configuration

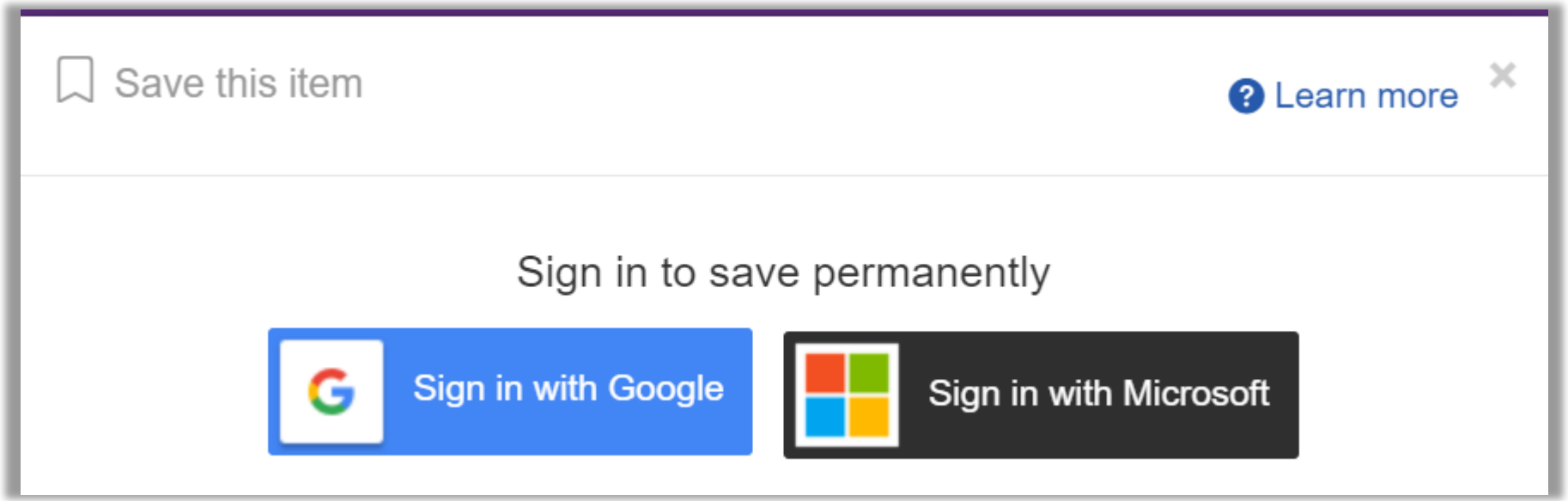
- Customizer > Advanced Search
- Default value is ON, but you must enable one of the authentication types to use the feature



Save Items Between Sessions

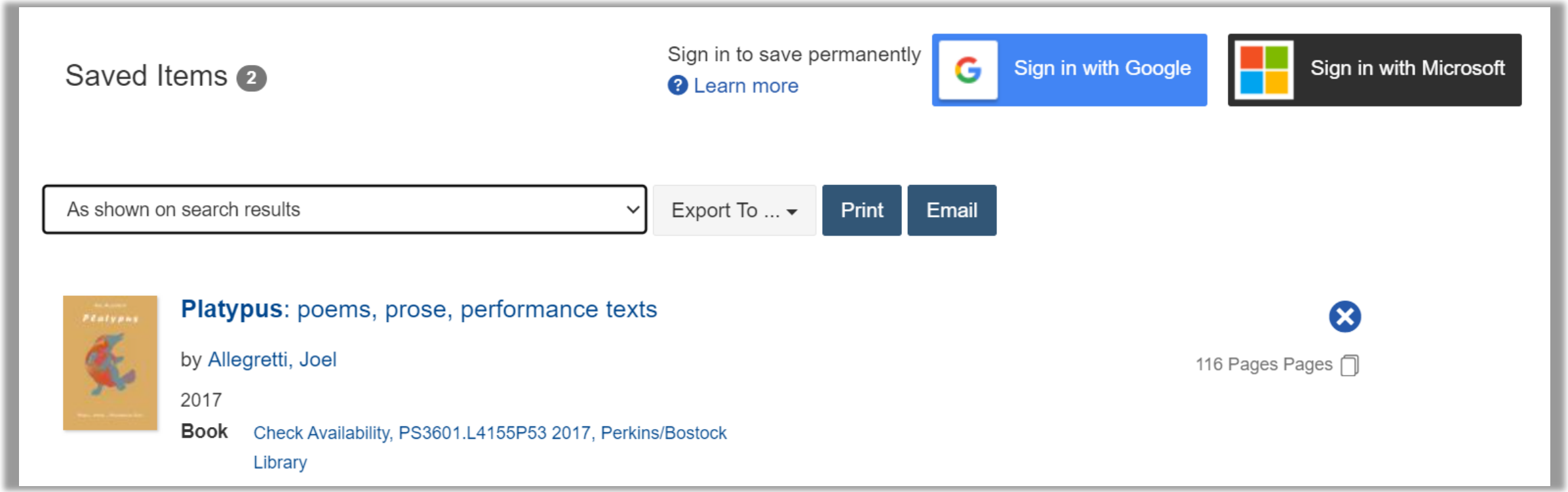
Allow users to permanently save citations to their account

- If the user is not authenticated, the first time they click the Saved Items icon they will be prompted to login:



Save Items Between Sessions

Allow users to permanently save citations to their account



ExLibris
Part of Clarivate

Bulk Export Search Results

Email a Full Result Set with One Action

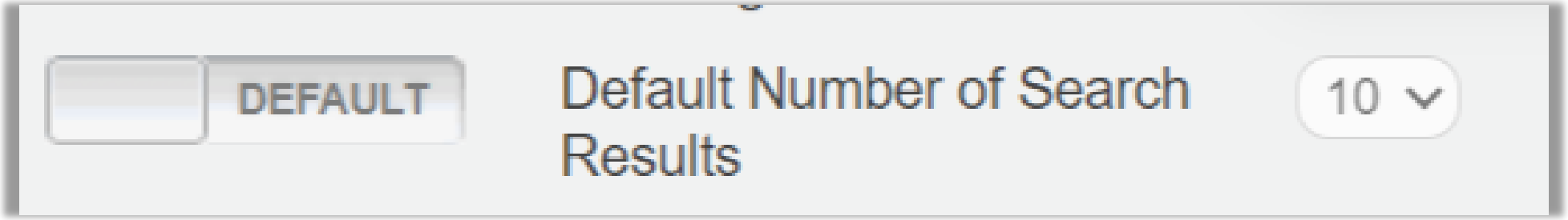
- Available for Production in the Q3 release
- Enhancements:
  - Translations for Email subject, Report title, and Default email message text
  - Return a URL for the Summon search result in the BookMark field in the .csv export report instead of the bookmark hash.
  - Return the standardized date format YYYY-MM-DD.
  - Clearer messaging for the 1000 item limit

Replace Summon Auto-scroll with Pagination

Critical accessibility correction

Configuration

- Customizer > Settings > General
- Default value is 10, can be increased to 25



Ex Libris
Part of Clarivate

Replace Summon Auto-scroll with Pagination

Critical accessibility correction

- Pagination area is identified as navigation
- Pagination area has a label "pagination"
- Controls are list items
- Each pagination control has an accessible label
- Previous page, page 1, current page 2,... Next page
- Current page is identified e.g. current page 2
- Each control can be reached with keyboard only



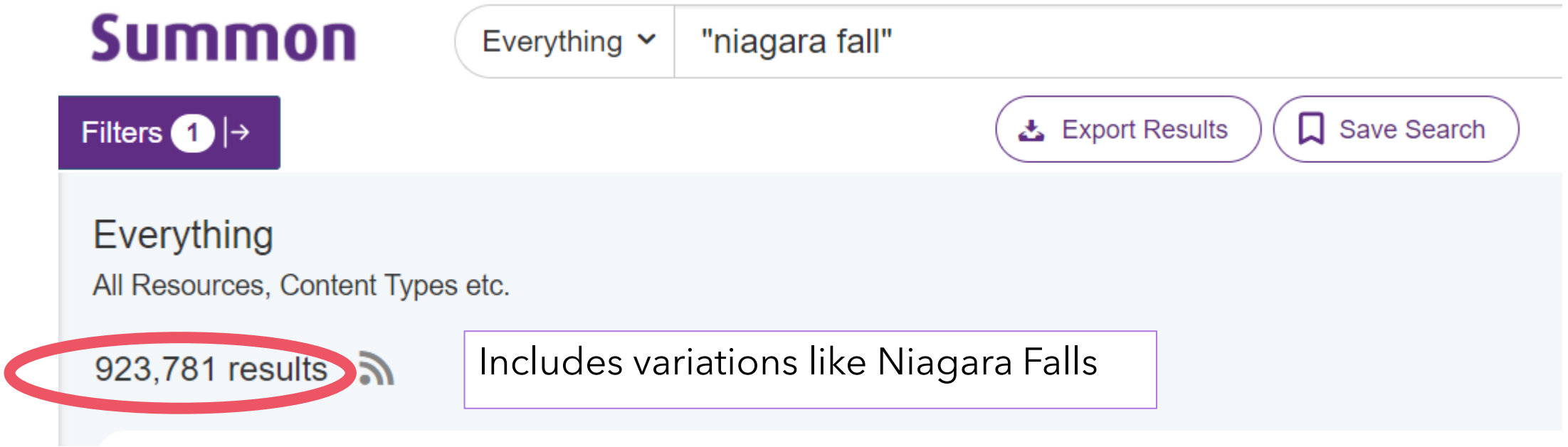
Verbatim Search Operator for Exact Matching

Disable stemming and language variants for phrase searches

- Idea Exchange request: a user that performs a phrase search is expecting an exact match, so don't do any stemming or variations
- Current logic applies
  - Stemming
  - Spelling, casing, and character normalization
  - Synonyms
- Optional feature for Summon–a new search operator
- **"query"=**

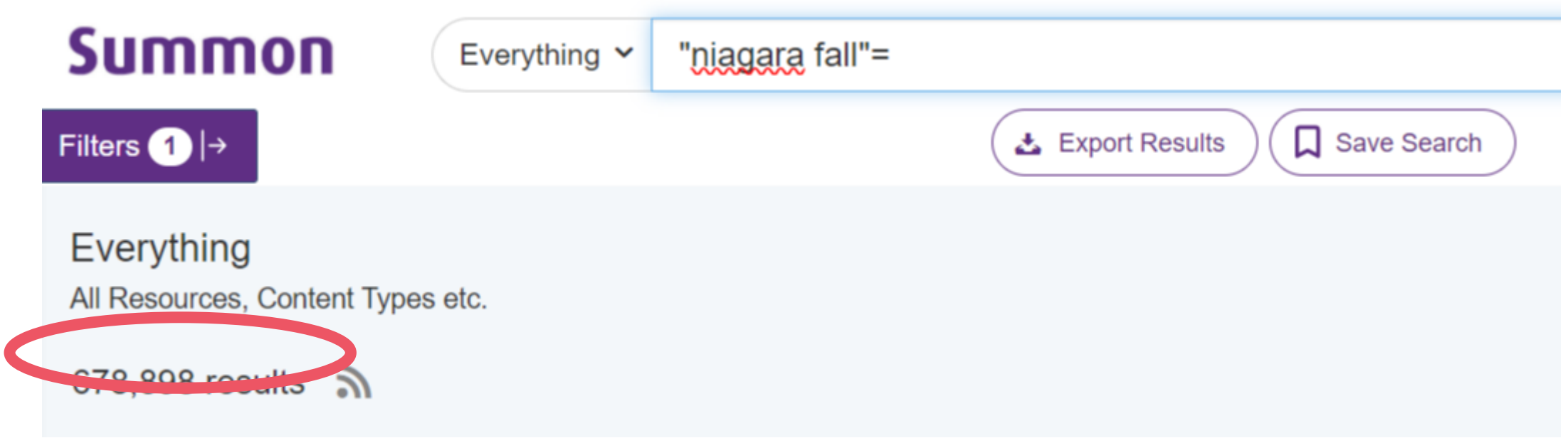
Verbatim Search Operator for Exact Matching

Disable stemming and language variants for phrase searches



Verbatim Search Operator for Exact Matching

Disable stemming and language variants for phrase searches

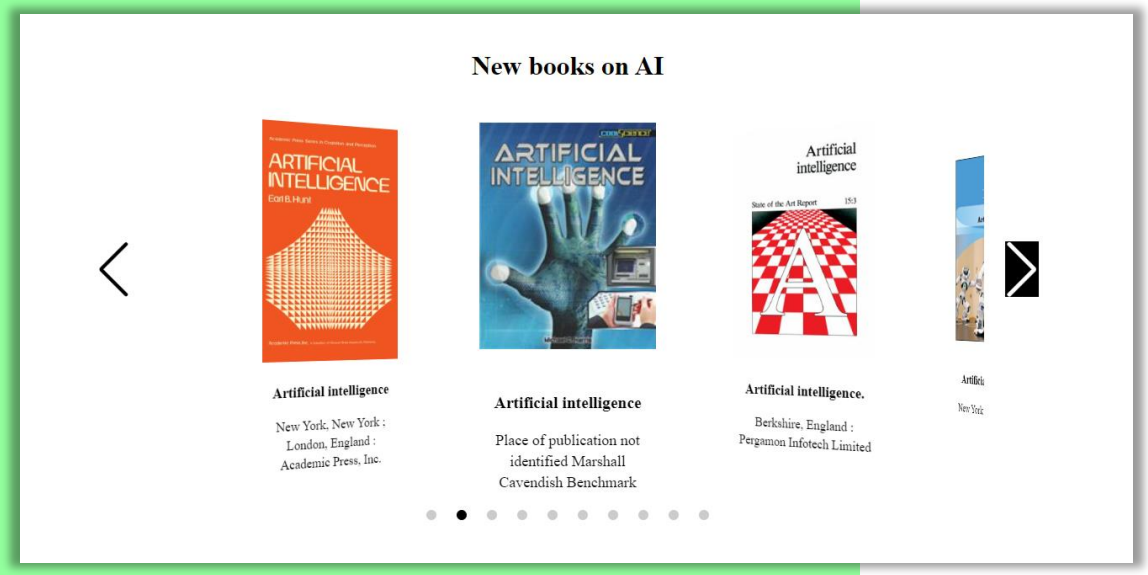


ExLibris
Part of Clarivate

Q3 2024 360/Intota Release Highlights

- Updated labeling in 360/Intota Summon → CDI
- New URL customization parameter for Reprints Desk
- New Crossref API integration
- ~50 bug fixes

2024 Q4



Carousel

- New carousel widget for embedding Summon in other websites
- Improved support for custom JS/CSS
- Open “Search within Journal” in a new tab
- Improve Book Review identification
- Identify methods for distinguishing "In Press" content
- Begin Research Assistant integration
- Auto-holdings with Project MUSE

ExLibris
Part of Clarivate

Upcoming Events



- **Conference: 9-11 September** (at the **DGI Byen/CPH Conference centre**)
- **Developers Day: 12 September** (at **The Black Diamond**, Royal Danish Library)
- **Ex Libris Knowledge Day: 12 September** (at **The Black Diamond**, Royal Danish Library)

Registration



© 2023 Clarivate
Clarivate and its logo, as well as all other trademarks used herein are trademarks of their respective owners and used under license.