

What's New with Summon & 360/Intota Services

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Summon



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Intota & 360 Services

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Summon

- Review accomplishments
  - New Summon Functionality
- A look ahead
  - November Release
  - Candidates for 2023 Summon Roadmap
- 360 and Intota Services
- Questions?



Review Recent Accomplishments

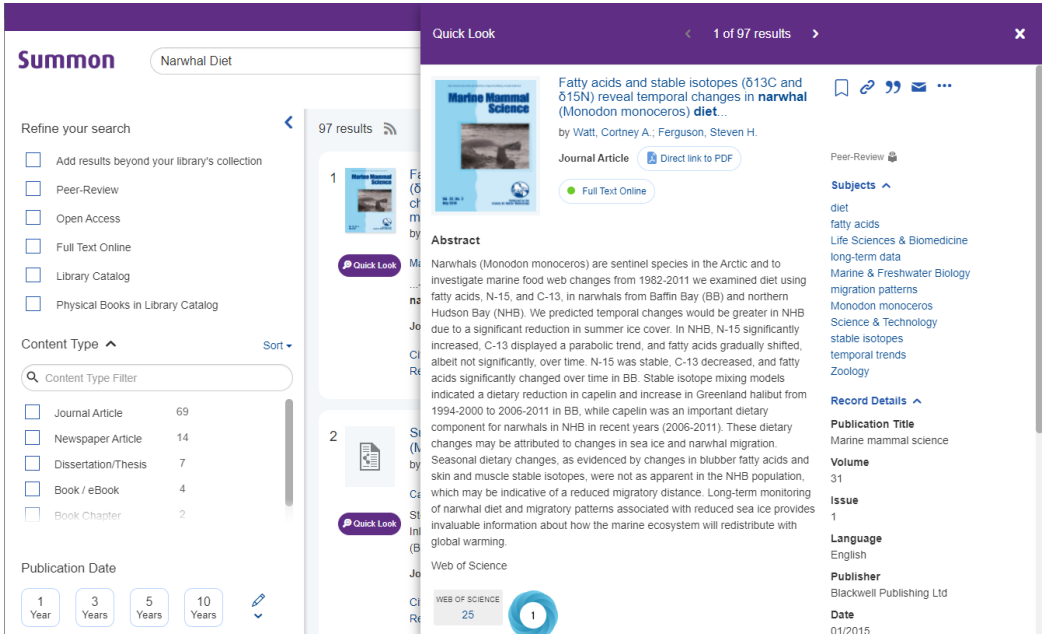
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Summon UI Refresh: Quick View / Preview Pane

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



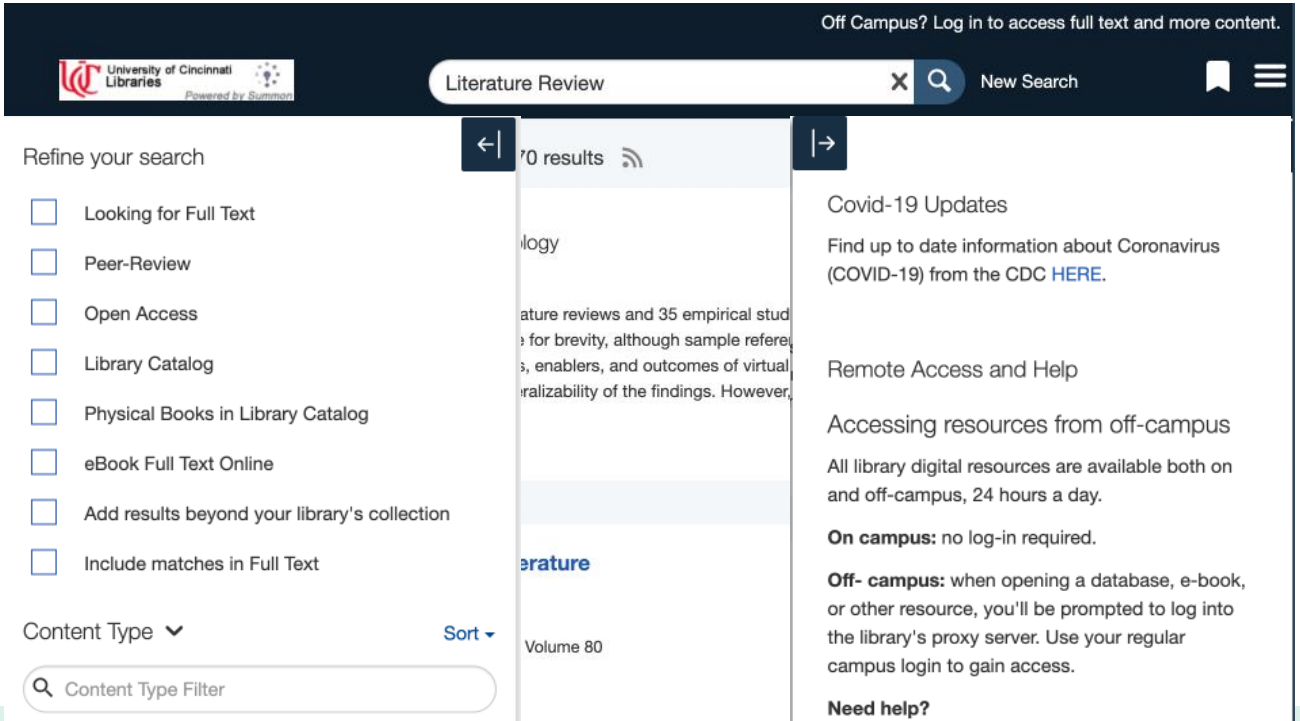
2022 H2

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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

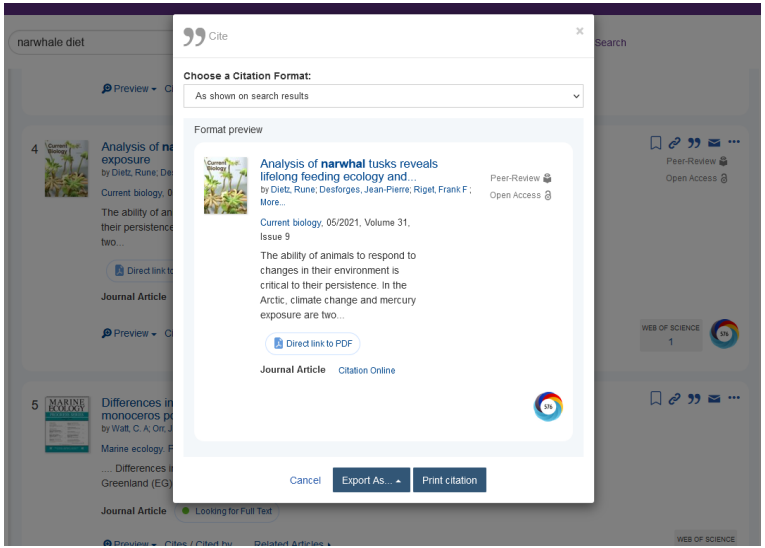


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Custom Citation Styles

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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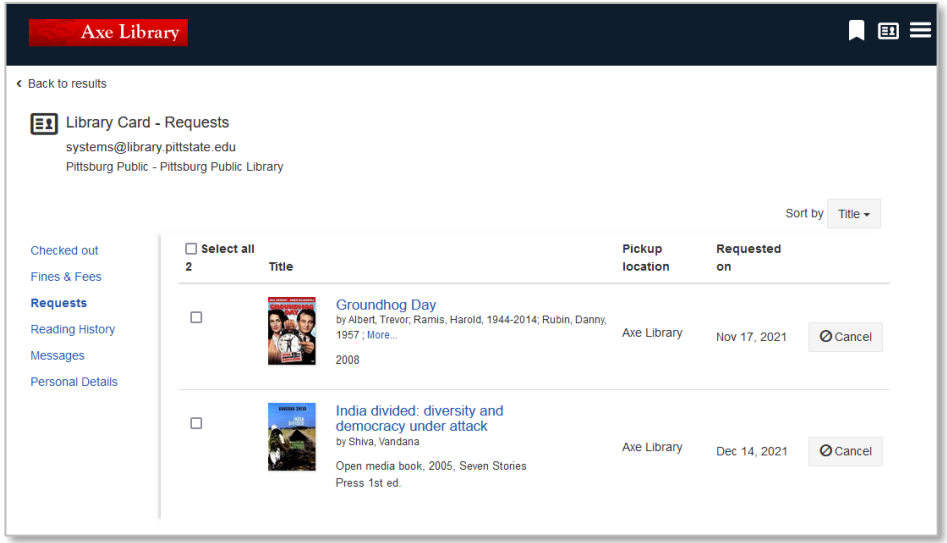
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Sierra via Summon: My Library Card Improvements

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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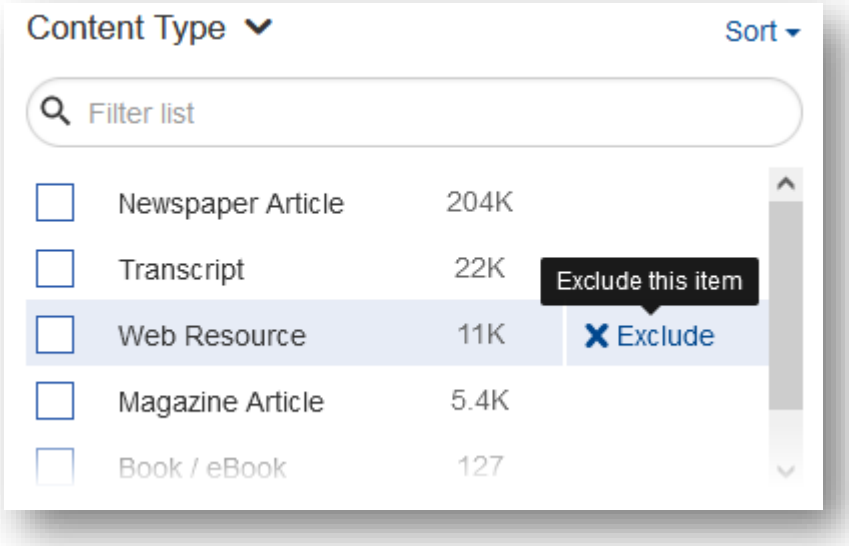
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Better Identify Online Newspaper Articles

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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November Release

Preview Environment: November 2

Production Environment: November 16

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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

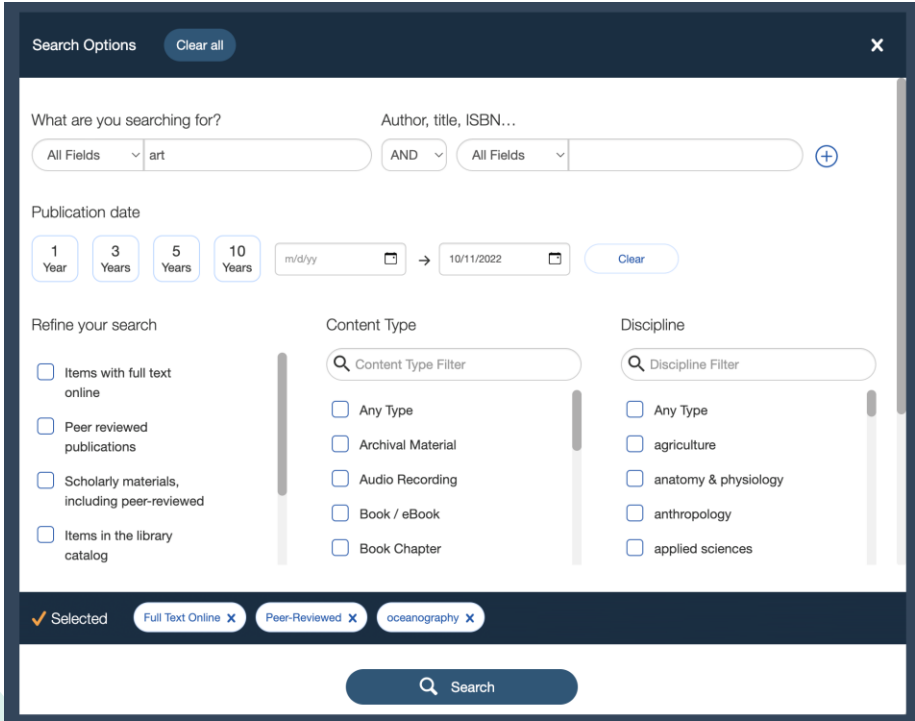
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Summon UI Refresh: Advanced Search

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

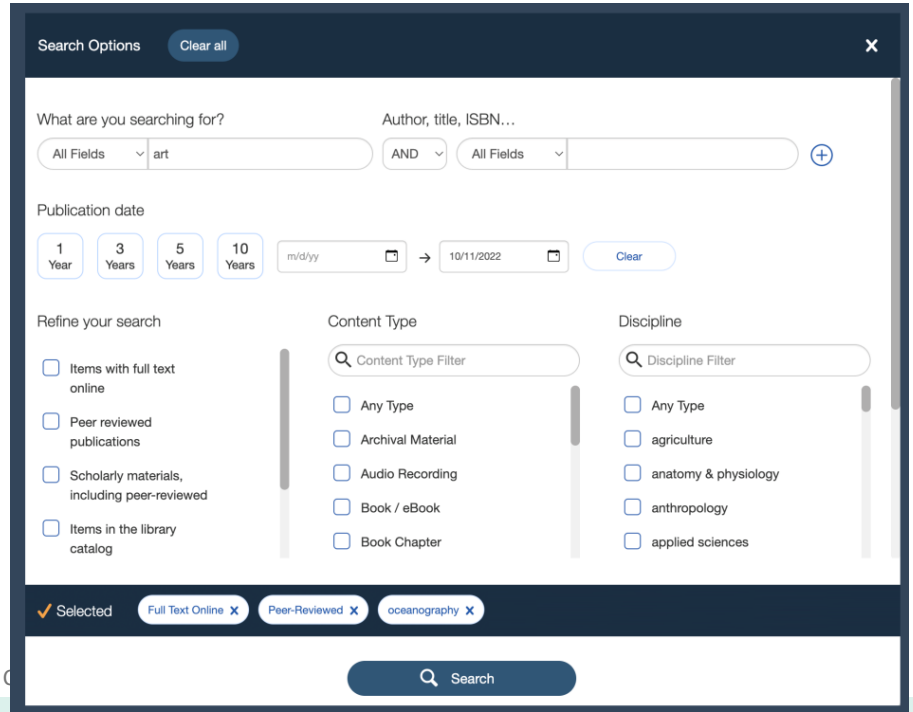
- Create a new Advanced Search overlay so frequently used tools are easily accessible
- Refine Advanced Search page for better usability

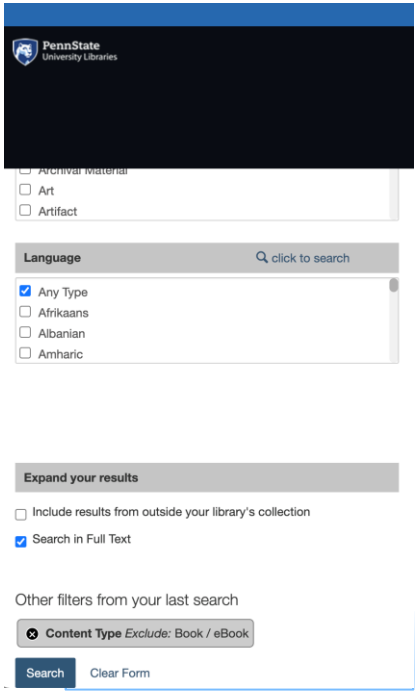


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Summon UI Refresh: Advanced Search

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





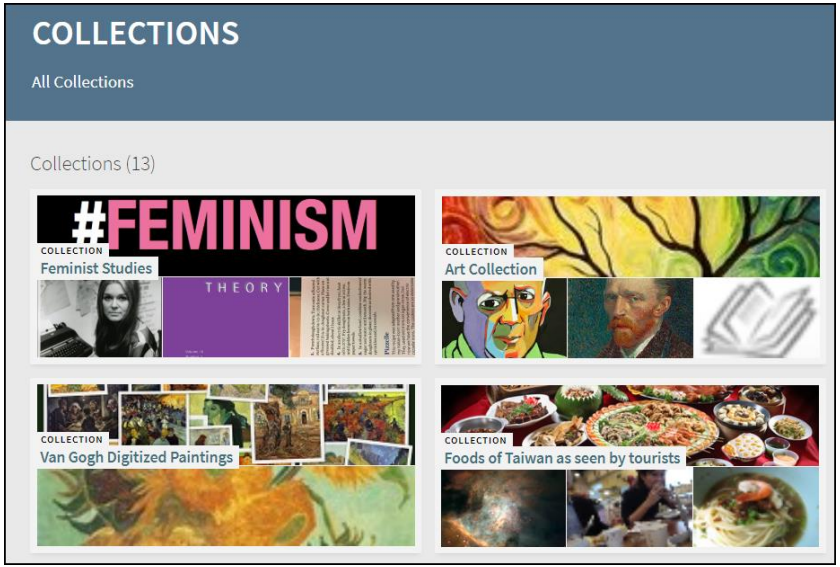
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Collection Discovery

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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2022 H2

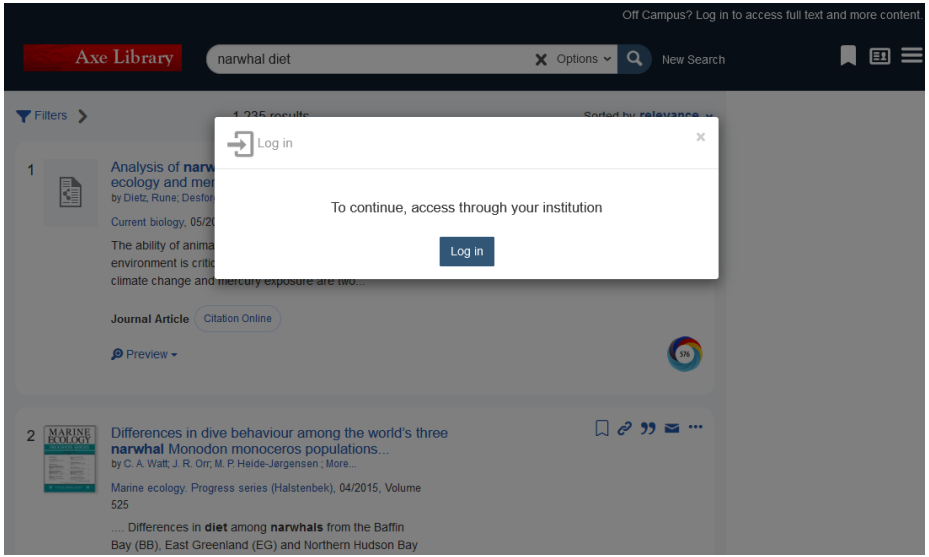
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Sierra via Summon: SAML Support

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

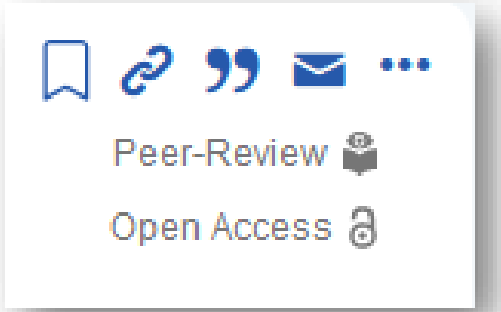
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Open Access Linking

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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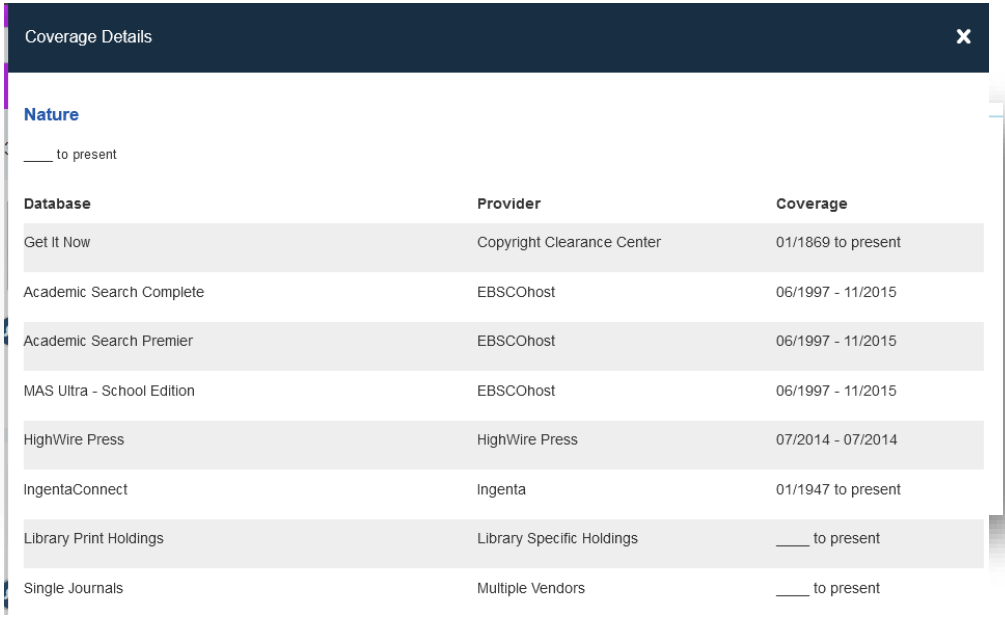
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Journal Coverage Dates

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

- 25 providers now supported
- New additions:
  - Alexander Street
  - American Institute of Aeronautics and Astronautics
  - Brepol Publishers
  - JSTOR
  - Project Muse
  - Taylor & Francis
  - World Scientific Publishing
- Additional providers planned throughout 2022-2023

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/products/all/journals	PDF, HTML
IEEE	Content under https://ieeexplore.ieee.org	HTML
Mary Ann Liebert, Inc.	Journals under https://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
Brepols Publishers	All	PDF
World Scientific Publishing	Journals	PDF

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Summon 2023 Roadmap

Features under consideration

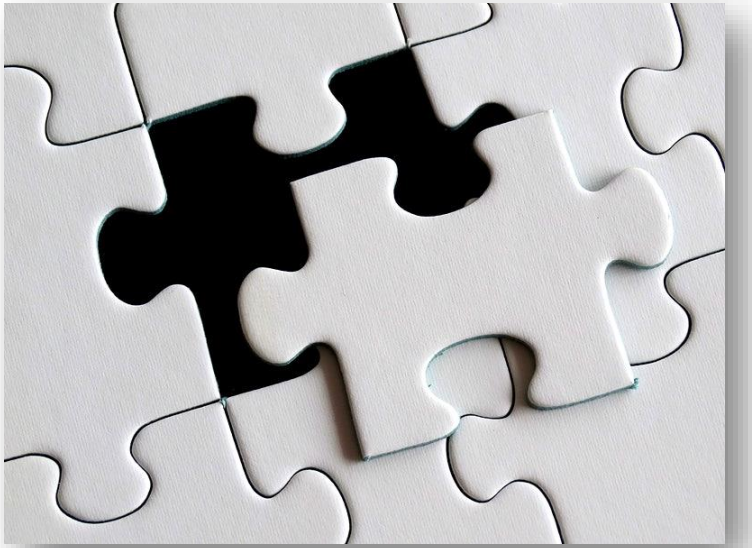
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LTI Support for Summon

Implementation of an LTI for Summon

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



NERS

2023 H1

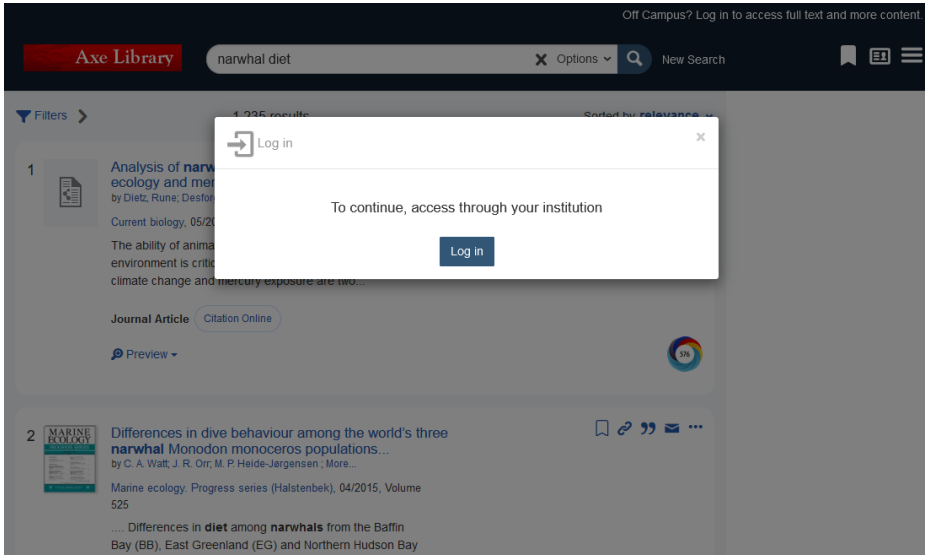
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Sierra via Summon: SAML for Saved Searches

Ability to log into Saved Searches using SAML authentication

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



2023 H1

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Data Quality and Rights

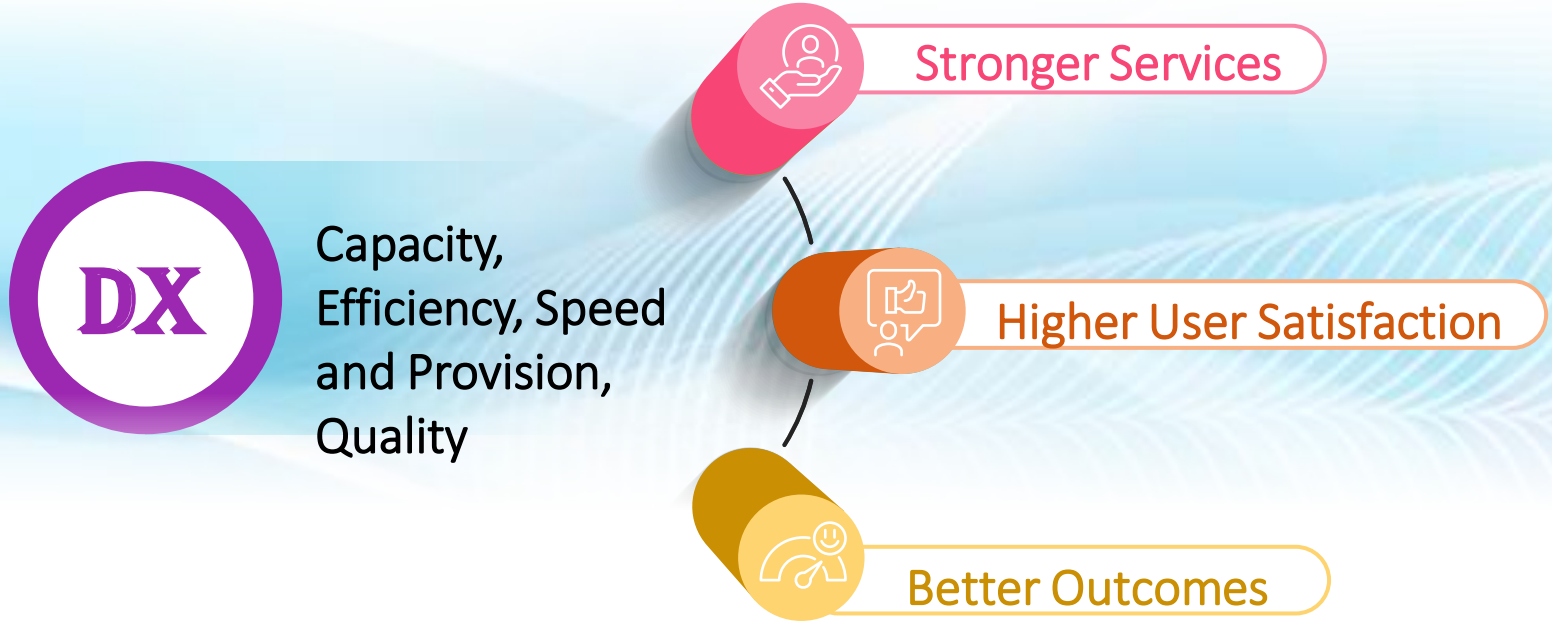
Data Quality and Rights	CDI Rights Processing Improvements - Enhanced Performance and Improved Matching 
	Ongoing Improvements in the Merged Record 

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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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Idea Exchange and NERS

- Add your ideas to the Idea Exchange
  - Both 360 and Summon ideas can be added
- Watch for 2023 NERS voting, coming soon



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360 and Intota: 2022 Progress

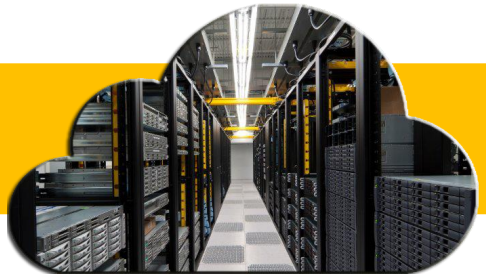
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360 and Intota Services 2022 Roadmap

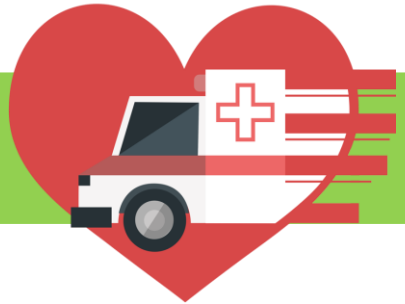
Community Requests and NERS





Infrastructure

Continuous Support



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Quarterly Release Dates

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



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2022 Highlights: Community Requests

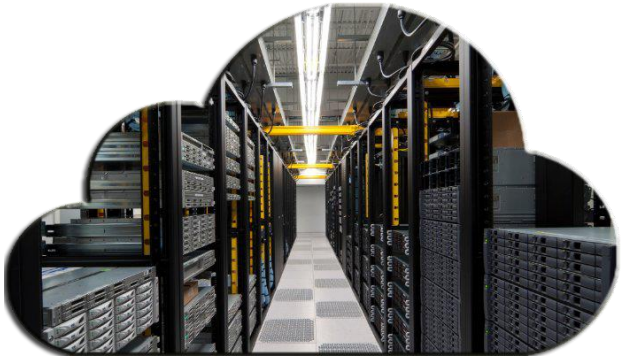
- Filter the EJP autocomplete suggestions
- Change EJP sort order to favor main title over alternate titles
- Show the MARC record availability percentage at the database level
- 360 Link: Bulk Upload of Database Order list
- Upload KBART-formatted files



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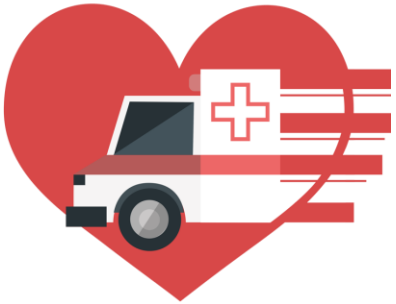
2022 H1 Highlights: Infrastructure

- Database management software migration
- Migration from FTP to MFT
- Ongoing tools maintenance



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2022 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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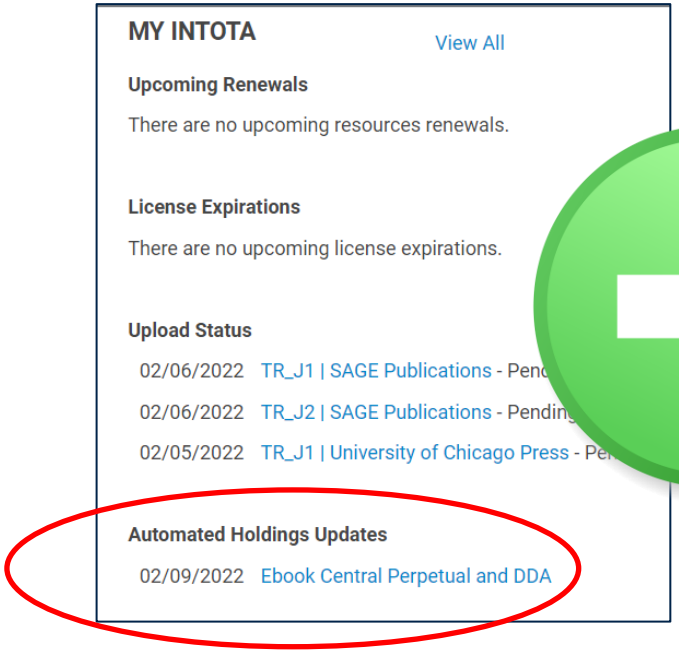
November 2 Release

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Integrate NISO Recommended Practices for KBART Automation

Expand auto-holdings support beyond Ebook Central

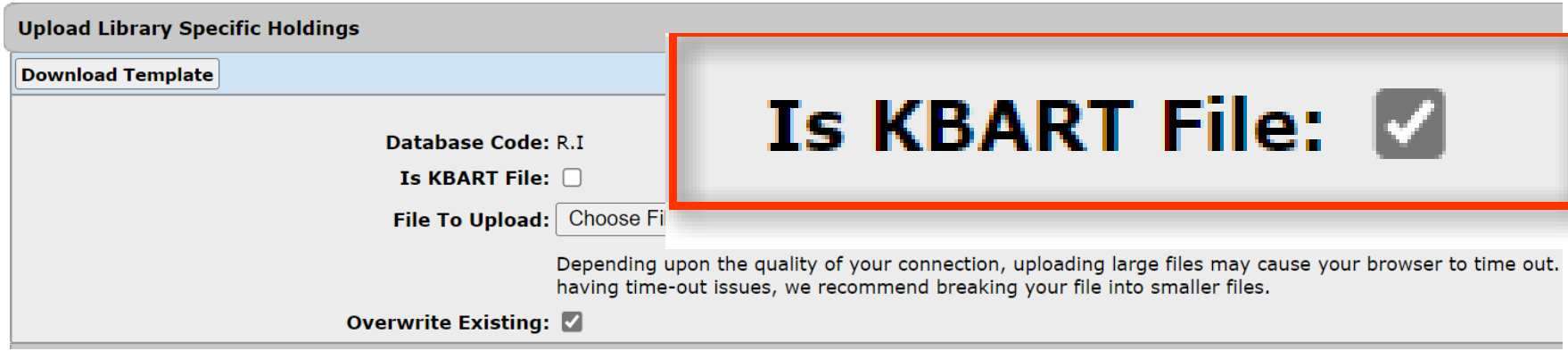


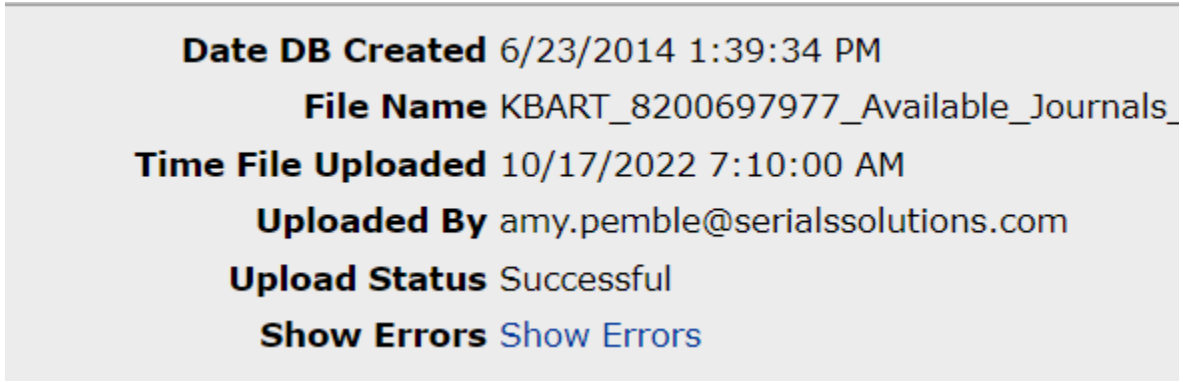


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Uploading KBART-formatted files to LSH Databases





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KBART Next Steps

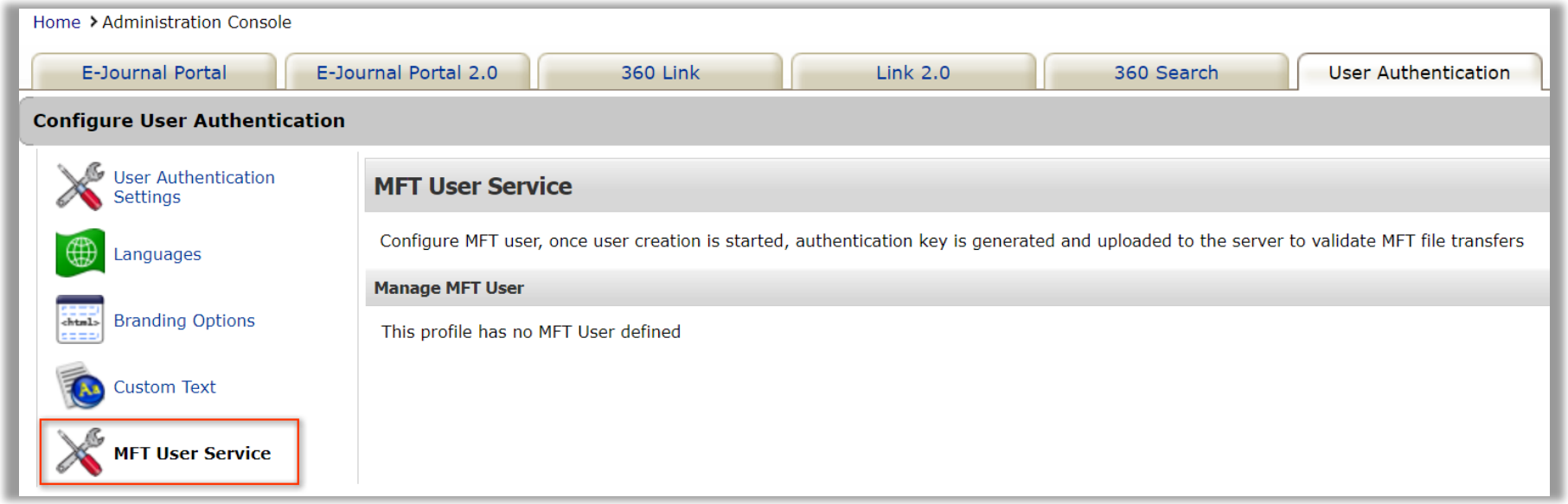
- Vet with the community and enhance processing
- Integrate into Intota
- Begin planning for automation
  - Documentation
  - Infrastructure (e.g. MFT)
  - Liaise with Provider Outreach

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MFT Configuration

- 360 MARC Updates users have a new space to add credentials



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MFT Project

- Three migration groups:
  - November 1
  - January 4
  - TBD (will include Summon/Sierra clients)
- Primary/Secondary contacts & recent login will receive an email 2 weeks before
- Refer to the "MFT FAQ for Summon and 360/Intota Clients" in the KC

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Additional Highlights

- DDA auto-holdings refactor to sync title identifiers
  - Fixes the issue of not all titles getting tracked
- New favicon for 360 Core
- Improved ‘Title contains all words’ search for CJK titles
- Fixed display of proxy URLs in consortia members (Intota)
- Improved SUSHI credentials test feature, processing of some provider/reports combinations

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Community Engagement

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Upcoming Events of Interest

- Be Cyber Smart – Approaches to Ensure Library Security, Privacy, and Reliability
  - Monday, October 24 @ 2:00 pm ET
- ELUNA learns
  - Acquisitions. November 2, 2022. 1:00 pm to 4:00 pm ET
  - Metadata. November 9, 2022. 1:00 pm to 4:00 pm ET
  - Discovery. November 16, 2022. 1:00 pm to 4:00 pm ET
  - Alma Data. November 30, 2022. 1:00 pm to 4:00 pm ET
  - Diversity, Equity, and Inclusion. To be scheduled. Registration Coming Soon!
  - Analytics. To be scheduled. Registration Coming Soon!



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