Summon & 360/Intota Services Update

IGELU Conference
12th –15th September 2022

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Agenda

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

Brent D. Cook
Director, Product Management
Summon

Review Recent Accomplishments

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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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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

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

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

📅 2022 H2

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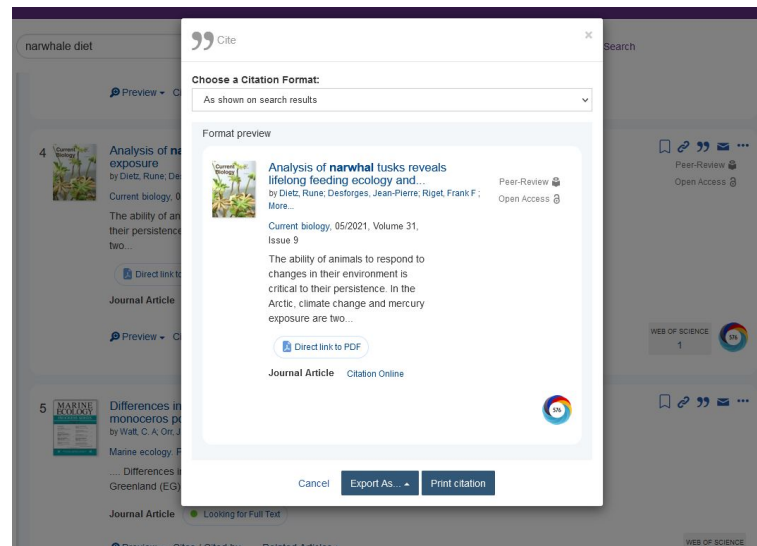
Sierra via Summon: SAML Support

Ability to log into Sierra via Summon using SAML authentication
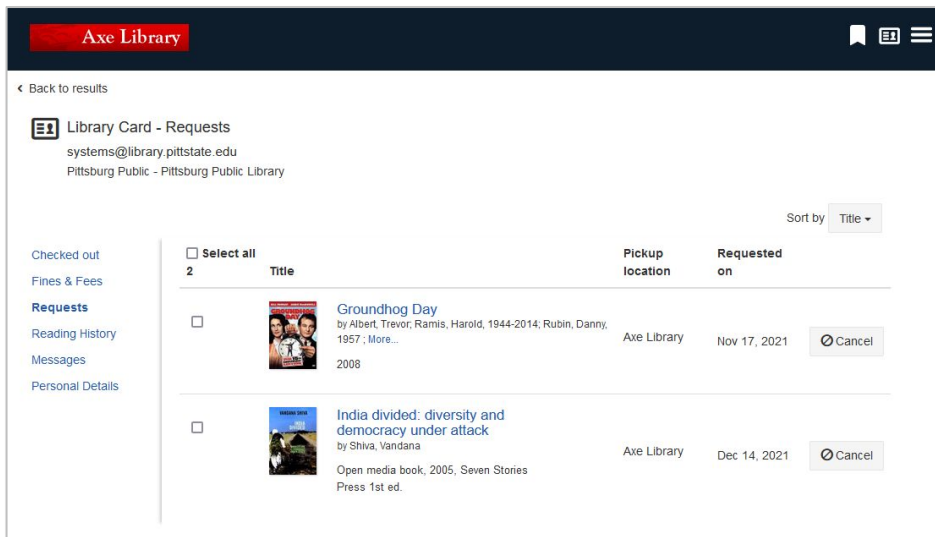
- Add SAML integration to the current Sierra via Summon integration
- Will support both CAS and SAML
- First step in additional improvements for authentication

📅 2022 H2

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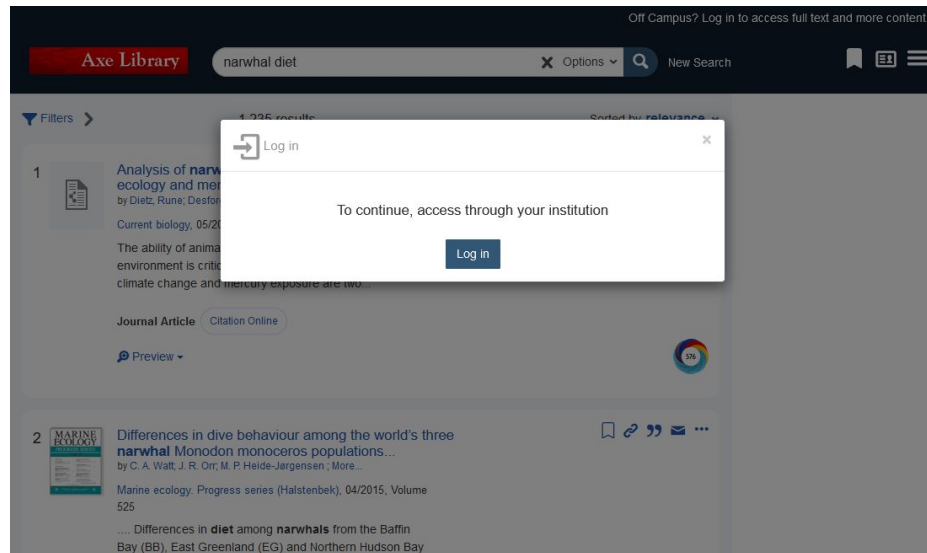
Sierra via Summon: My Library Card Improvements

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

2022 H2

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

Content Type ∨   Sort ▾

🔍 Filter list

☐ Newspaper Article   204K

☐ Transcript   22K   Exclude this item

☐ Web Resource   11K   ✖ Exclude

☐ Magazine Article   5.4K

☐ Book / eBook   127

NERS   2022 H2

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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)

NERS

2022 H2

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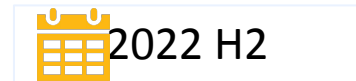
November Release

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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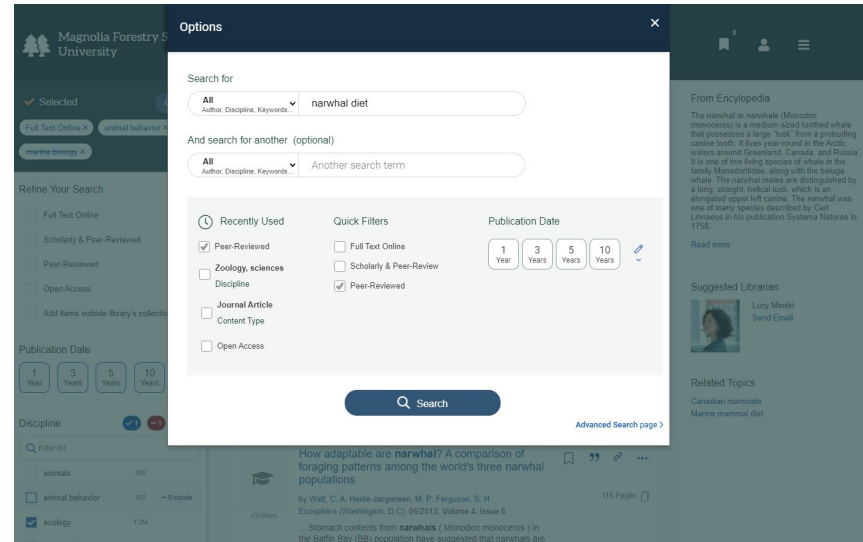
Open Access Linking

Ensure OA link Is Available for Open Access Content

- Improve linking to Open Access Content
- Link directly from OA icon to available content

NERS

2022 H2

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

International journal of American linguistics
ISSN: 0020-7071
Look up Article

Journal Details ▼   Peer Reviewed

ProQuest One Academic Eastern Edition
UMSL Libraries Print Journals (Update)
1900 to Present in Reprints Desk
07/01/1917 to 01/01/1921 in Open Access Digital Library
07/01/1993 to 1 year ago in Academic Search Alumni Edition

NERS   2022 H2

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

COLLECTIONS

All Collections

Collections (13)

COLLECTION
Feminist Studies

COLLECTION
Art Collection

COLLECTION
Van Gogh Digitized Paintings

COLLECTION
Foods of Taiwan as seen by tourists

NERS

📅 2022 H2

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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

NERS

📅 2022 H2

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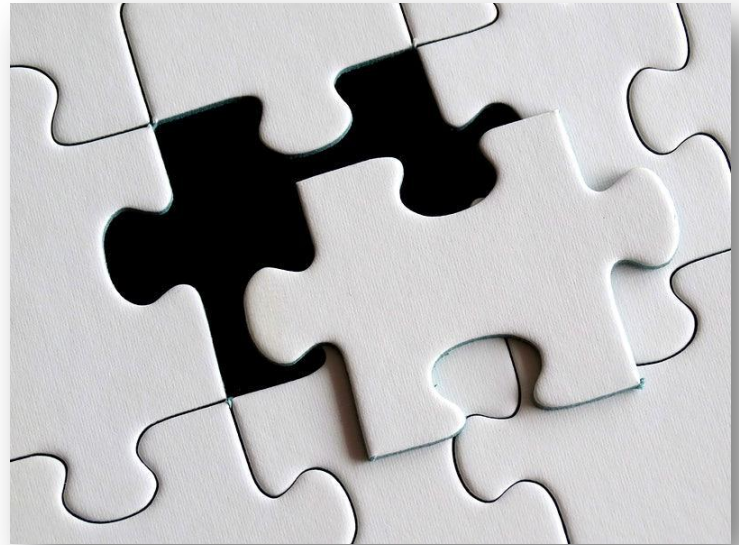
Other Initiatives

Data Excellence (DX)

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

DX

Capacity, Efficiency, Speed and Provision, Quality

Stronger Services

Higher User Satisfaction

Better Outcomes

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Enhancing Rights in CDI

- Major **rights processing** improvements
  - Goal to reduce processing time to 24-48 hours
  - Decreased turnaround from 48-72 hours to below 35 hours
  - Additional improvements in progress throughout 2022

Rights Processing Median (Hours)

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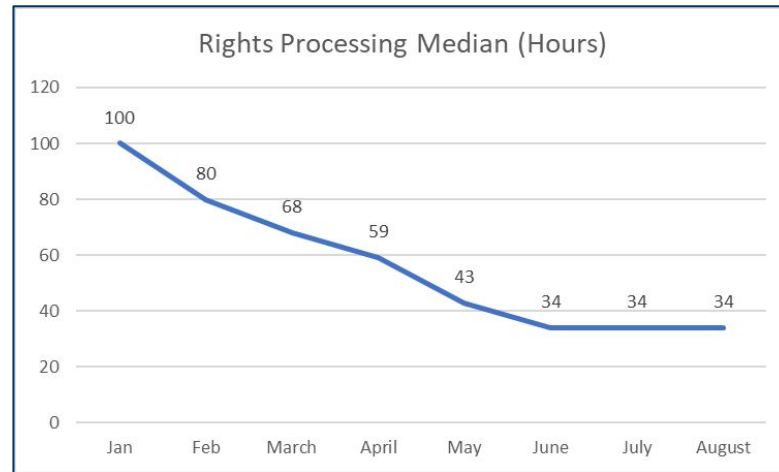
Quicker access and fewer clicks with direct linking to HTML/PDF pages

- 20 providers already supported, with over 10,000 collections and 1.5 billion records
- Additional providers planned throughout 2022 and 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
Bioone	Journals Content under https://bioone.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
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

DX

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Community Engagement

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NERS Voting Soon

- 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 Webinars

- Quarterly What's New with Summon and Intota/360

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360 and Intota Services

360 and Intota Services 2022 Roadmap

NERS

Infrastructure

Continuous Support

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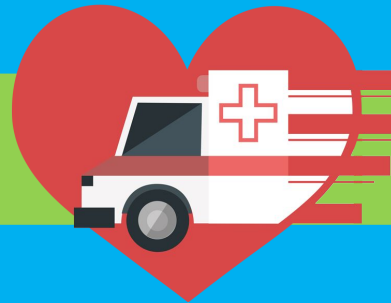
Quarterly Release Dates

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

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Community Requests and NERS

EJP: Filter the Autocomplete Suggestions

- Automatically filter search suggestions to resources the library licenses / owns
- Eliminate 0 result searches and user confusion

Online Journals, Books and more

Search by Title or Identifier (ISSN/ISBN):

○ All   ● Journals Only   ○ Books Only   ○ Videos Only

| Title begins with ▾ | heart disease | |

If you already have a citation an

Heart disease (Hagerstown, Md.)

Heart disease weekly

2022 in Review

Community Requests and NERS

📅 2022 Q2   View the MARC record availability at the database level

Library Databases

Filter By: [Name Begins With ▾] [_____] [Apply]

Go To Page: [1] / 3 ▶ ▶▶|

Database Name	Custom Database Name		Code	Status	Titles	MARC Coverage		Provider
ABI/INFORM Global		🟢➕	M0C	Subscribed	4308	84%	📇	ProQuest
Acceda Noticias		🟢➕	BSP	Subscribed	94	27%	📇	NewsBank
Access Business News		🟢➕	BAB	Subscribed	296	61%	📇	NewsBank
Access International News		🟢➕	BAI	Subscribed	4855	53%	📇	NewsBank
Access Military, Government News		🟢➕	BMT	Subscribed	32	53%	📇	NewsBank
Access Newswires, Transcripts		🟢➕	BBT	Subscribed	358	15%	📇	NewsBank
Access World News Research Collection		🟢➕	BAW	Subscribed	12810	56%	📇	NewsBank
ACS All Publications		🟢➕	GGK	Subscribed	70	100%	📇	American Chemical Society
ACS DGRWeb Institution Search		🟢➕	ADF	Subscribed	0	0%	📇	American Chemical Society
ACS Publications		🟢➕	ACS	Subscribed	99	99%	📇	American Chemical Society
American Chemical Society Legacy Archives		🟢➕	ACJ	Subscribed	40	100%	📇	American Chemical Society
American Chemical Society Single Title Subscriptions		🟢➕	XKZ	Subscribed	23	91%	📇	American Chemical Society
American Chemical Society Supporting Information		🟢➕	SUP	Subscribed	47	32%	📇	American Chemical Society
American Chemical Society Web Editions - NESLi2		🟢➕	GNL	Subscribed	49	100%	📇	American Chemical Society

Community Requests and NERS

📅 2022 Q2

EJP: Rank main titles ahead of alternate titles

Configure E-Journal Portal 2.0

- EJP 2.0 Activation and Configuration
- Branding Options
- Search Page Options
- **Results Page Options**
- Mobile Settings

Results Page Options

Any changes to Results Page Options will take effect after the daily profile data refresh.

Results Navigation and Style

Results on a Page:	50
Sort Search Results by Main Title:	☑

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Community Requests and NERS

📅 2022 Q2   360 Link: Bulk Upload of Database Order list

📅 2022 H2

KBART Automation Recommended Practices

MY INTOTA   View All

Upcoming Renewals

There are no upcoming resources renewals.

License Expirations

There are no upcoming license expirations.

Upload Status

02/06/2022 TR_J1 | SAGE Publications - Pend

02/06/2022 TR_J2 | SAGE Publications - Pending

02/05/2022 TR_J1 | University of Chicago Press - Pe

Automated Holdings Updates

02/09/2022 Ebook Central Perpetual and DDA

Home / Standards Committees / kbart

KBART Automation Working Group

Now Available!

The **KBART Automation Recommended Practice (NISO RP-26-2019)** is now available.

ecommended Practice for Enhancing KBART
Automated Exchange of Title Lists and
rary Holdings (KBART Automation
orking Group)

This project, begun in early 2017, will create a NISO Recommended Practice to support individual library holdings of electronic products and to automate the request and retrieval of KBART reports for title lists and library holdings. The work item approved by NISO Voting Members describing the project is available.

Poster approved by the NISO Discovery to Delivery Topic Committee, May 23, 2017

Section pages
Knowledge Bases And Related Tools (KBART)
- KBART for Content Providers
- KBART Endorsement
- KBART Glossary of relevant terms
- KBART Additional Resources
- KBART Automation Working Group
- KBART Frequently Asked Questions

📅 **2022 Q3**   KBART Phase 1: Ability to Manually KBART Upload Files
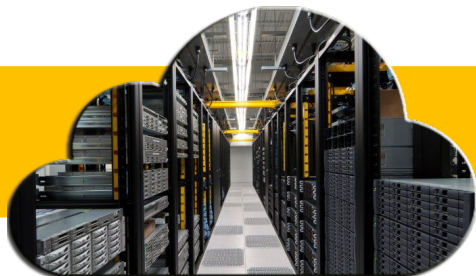
Infrastructure

📅 2022 Q2

June 17: Database management software upgrade completed

Intota Assessment migration to Oracle Analytics Server platform. No service disruption. *TBD*

Migration to new MFT platform begins November 1. FAQ available here: https://bit.ly/3pTz9b7

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Continuous Support

IEDL refinements to increase linking accuracy

SUSHI harvest conflicts

Auto-holdings title conflict

Linker syntax changes

Show terms of use in EJP

VPAT updates

Add OVID databases to global exclude list

Improve CDI rights feed

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Coming in November Release

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Planned November Highlights

- Continued KBART development
  - Adjustments to new upload capabilities
  - Add KBART import to Intota
  - Add KBART import support for LSH databases
  - Plan infrastructure for automating holdings exchange
- Update the EJP "Title Contains all Words" for CJK languages
- Consortium Support refinements
  - Show proxied links in Intota
  - Allow member libraries to add custom linking parameters (e.g. EBSCO)
- Increase number of downloadable results in Ulrichsweb
- … and more!

Thank you!

Brent.Cook@Clarivate.com