Summon/360 Working Group Open Meeting`

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Chair, ELUNA Summon/360 Working Group

IGeLU 2023, Leuven

12 September 2023

Agenda

- Introductions
- ELUNA Summon-360 Working Group: Who We Are and What We Do
- Working Group Highlights for 2022-23
- Overview of the Summon and 360 Enhancement Process
- How IGeLU Members Can Get Involved
- Questions and Discussion

Introductions

Jim Hammons

Head of Library Technologies

Ball State University

Muncie, Indiana, USA

Chair, ELUNA Summon/360 Working Group since 2022.

Member since 2016.

Augusto Ribeiro

Head of Document and Information Management

University of Porto (Portugal)

IGeLU Steering Committee Liaison to ELUNA Summon/360 Working Group since 2022.

Summon/360 WG: Who We Are, What We Do

- Founded in 2016 as a joint Summon Working Group. After the first joint year, ELUNA continued the Summon Working Group as of 2017.
- 360 products acknowledged in name and formally added to the enhancement process in 2020.
- 10 current members, all in the US. Steering Committee liaisons from both ELUNA and IGeLU.
- Monthly internal meetings and meetings with Product Managers (Brent Cook, Amy Pemble). Chance to escalate issues, help set priorities, give feedback on features in development.
- Enhancement Team (3 members) leads the annual NERS vote.
- Liaisons to Content, CDI, Primo, Alma, Linked Open Data, DEI in Search groups. Anticipate involvement in AI Advisory Group.

Highlights for 2022-23, Goals for 2023-24

Highlights, 2022-23

- Welcomed Augusto Ribeiro as IGeLU Steering Committee Liaison
- NERS ballots 13 roadmap items for Summon and 360
- Special Meeting with ExLibris managers Christine Stohn (CDI) and Tamar Ganor (Content)

Goals, 2023-24

- Add 2-3 new members to the Working Group
- Monitor new enhancements, give new feedback to ExLibris
- Help implement the Aha! enhancement request platform
- Help IGeLU form a Summon/360 Working Group

Summon and 360 Enhancement Process

- Start with Idea Exchange: All Summon and 360 sites can post ideas regardless of ELUNA/IGeLU Membership.
- Enhancement Team reviews a list of Ideas
  - Prioritize new and popular ideas.
  - Clarify and combine ideas.
  - Verify that features don't already exist, aren't in development.
  - Reduce list from about 125 to about 50 for the NERS ballot.
- NERS voting, 2-3 weeks in the Fall.
- Submit top 15-20 to product managers for pointing.
- Make final selection of enhancements, up to 200 complexity points. Next year: 150 points for Summon, 50 for CDI.
- How will this change with Aha?

How IGeLU Members Can Get Involved

- Enhancement Process
  - NERS ballot open September 13-October 2. Only IGeLU/ELUNA members vote. Vote at ners.igelu.org
  - Idea Exchange: post new ideas throughout the year at ideas.exlibrisgroup.com. Any customer can post, comment, upvote.
- Summon listserv
  - Subscribe at exlibrisusers.org
- Join the new IGeLU Summon/360 Product Working Group
  - Talk to Augusto Ribeiro! Email: summon@igelu.org
  - When WG is established, we'll discuss how the WGs will work together.
- How do you want to be involved?