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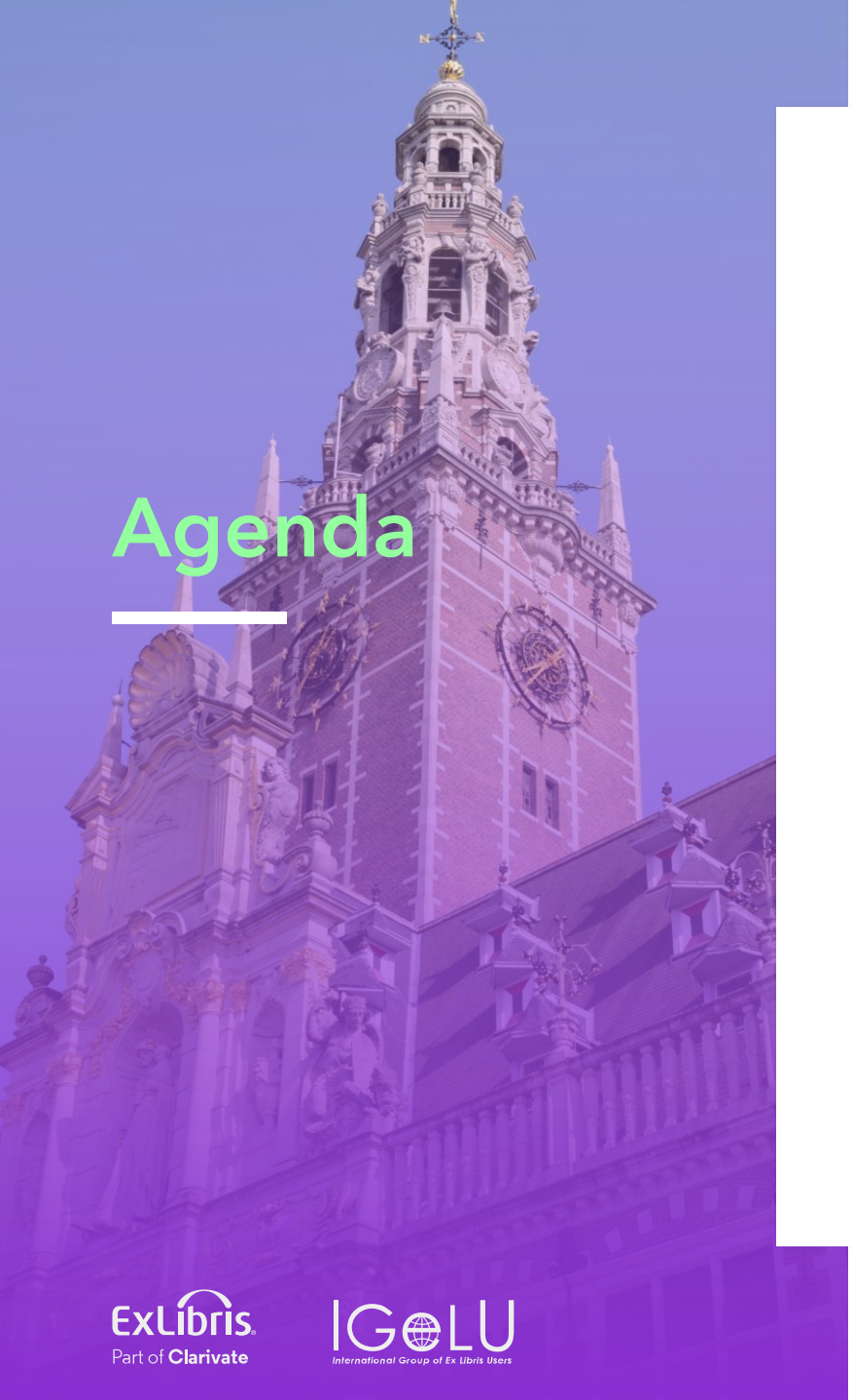
International Group of Ex Libris Users
What's New with Summon & 360/Intota Services
Brent D. Cook
Director, Product Management Summon



Agenda

Summon

- Recent Accomplishments
- November Quarterly Release

Highlights for CDI Development in 2023

360 and Intota Services

- November Quarterly Release

Upcoming Webinars and Community Involvement

Questions?

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Summon Overview

Planned Release Dates and Preview Environment

Quarterly Releases – include release notes and preview period

February 1	Preview January 18
May 3	Preview April 19
August 2	Preview July 19
November 1	Preview October 18

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

2023 H1

- Advanced Search: Improve Search Box Layout
- Advanced Search: Updated Look and Feel Controls
- SAML for Saved Searches
- LTI Support for Summon
- Google Analytics 4 Support
- Mandatory sender e-mail field in Summon (NERS)

2023 H2

- Scopes for Summon Searches
- Improve the Quick Look Pane Layout (NERS)
- Display 5xx Fields in Quick Look (NERS)
- “Include matches in Full Text” to Search Suggestions (NERS)
- Ability to Customize Order of Elements in the Right Pane (NERS)
- Ability to match language settings of Summon with 360 Link (NERS)
- Prevent eBook and Computer File records from Merging (NERS)

- Data Quality Improvements
- Ongoing Analytics
- Accessibility

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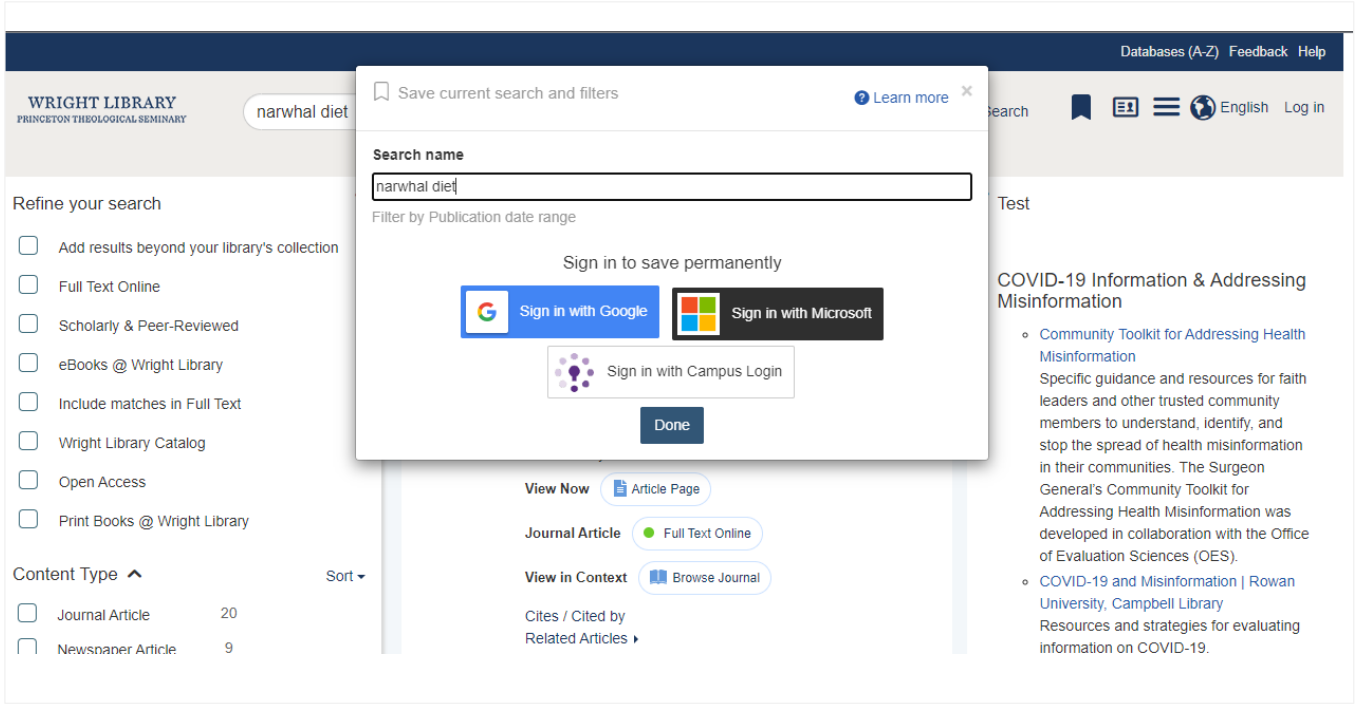
Summon Recent Accomplishments

Sierra via Summon: SAML for Saved Searches

Ability to log into Saved Searches using SAML authentication

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



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Google Analytics

Support for Google Analytics 4

- Improve reporting by updating Google Analytics to support current version
- Also includes Tag Manager Support
- Currently live

Note: Google support for legacy analytics ended July 1st, 2023

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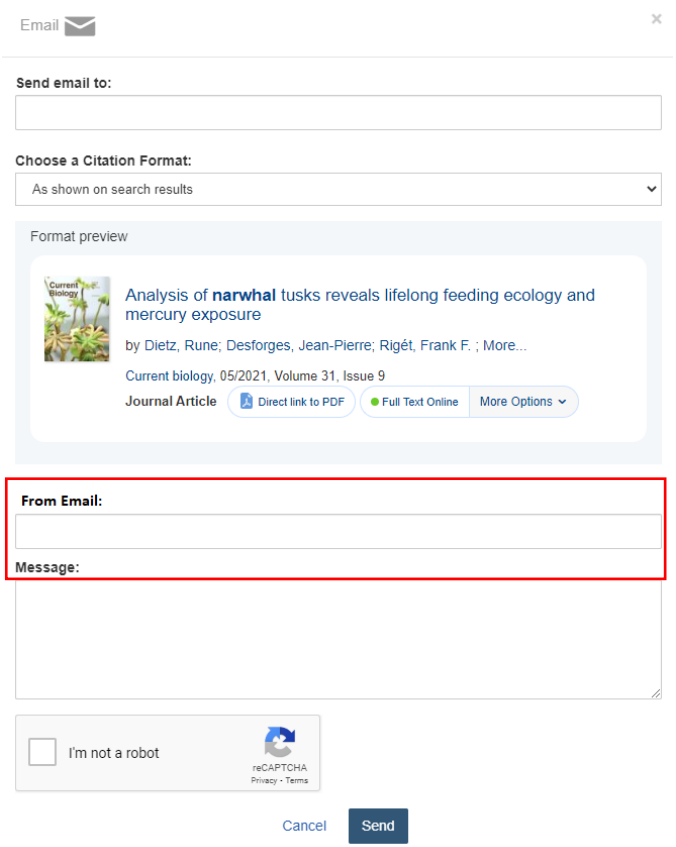
Mandatory Sender Email Field in Summon

Provide the option for a sender's email for citations

- Allows institutions to add a field requesting the user's email address
- Address will be included in the body of the email to assist with follow up for staff, when needed
- Configurable as a required field by institution

NERS



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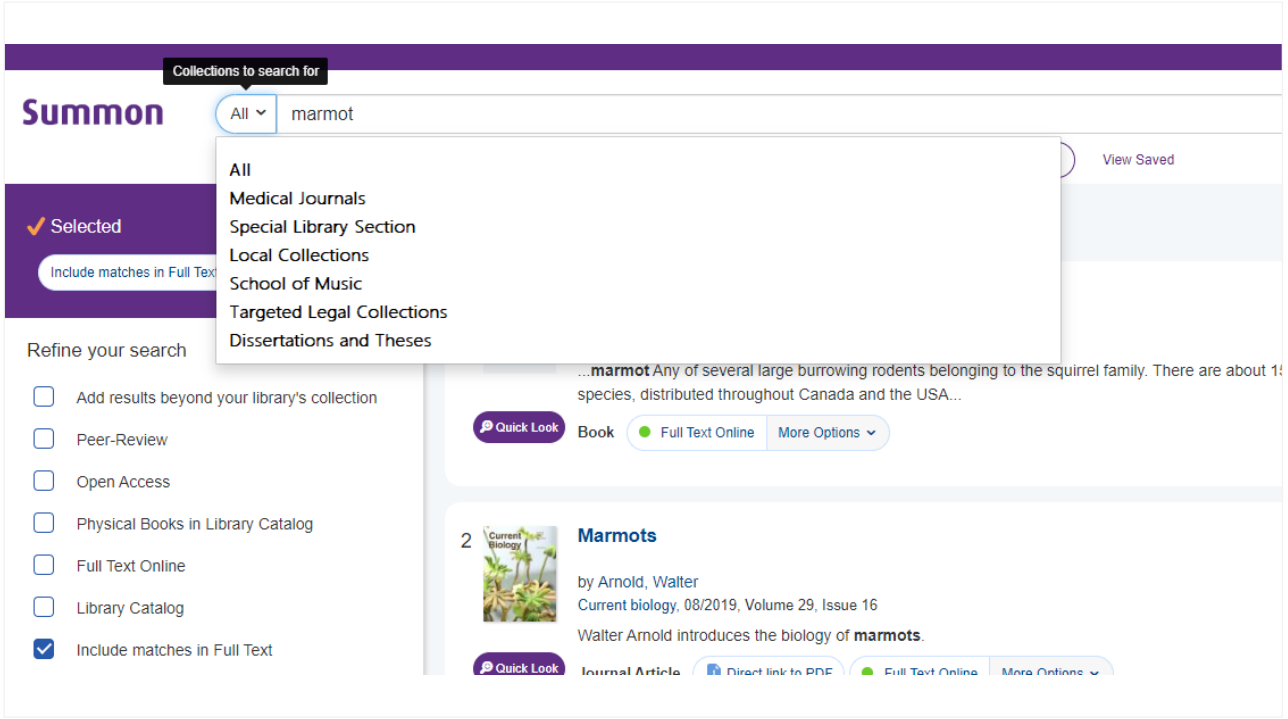
Scopes for Summon Searches

Allow users to ‘pre-filter’ their search, limiting to a specific group vs. searching the full catalog

- Create scopes, and prioritize display order when there are multiple scopes
- Limit to local records
- Limit by Content Type, Discipline, Language, New Records, and Time Period
- Add or remove resources by ISBN/ISSN to a search scope
- Add library locations to a search scope

2023 Q3



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Scopes for Summon Searches

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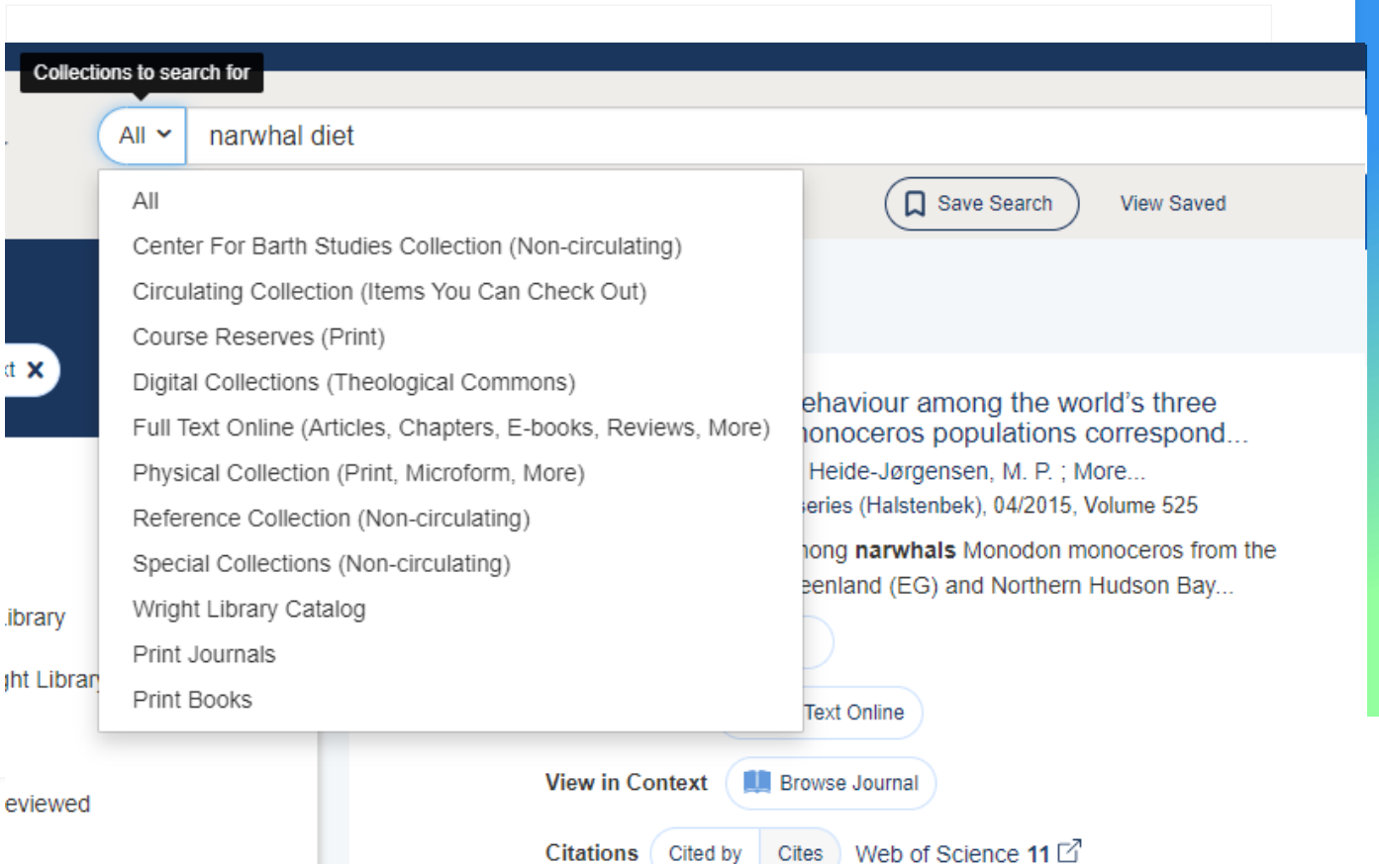
2023 Q3



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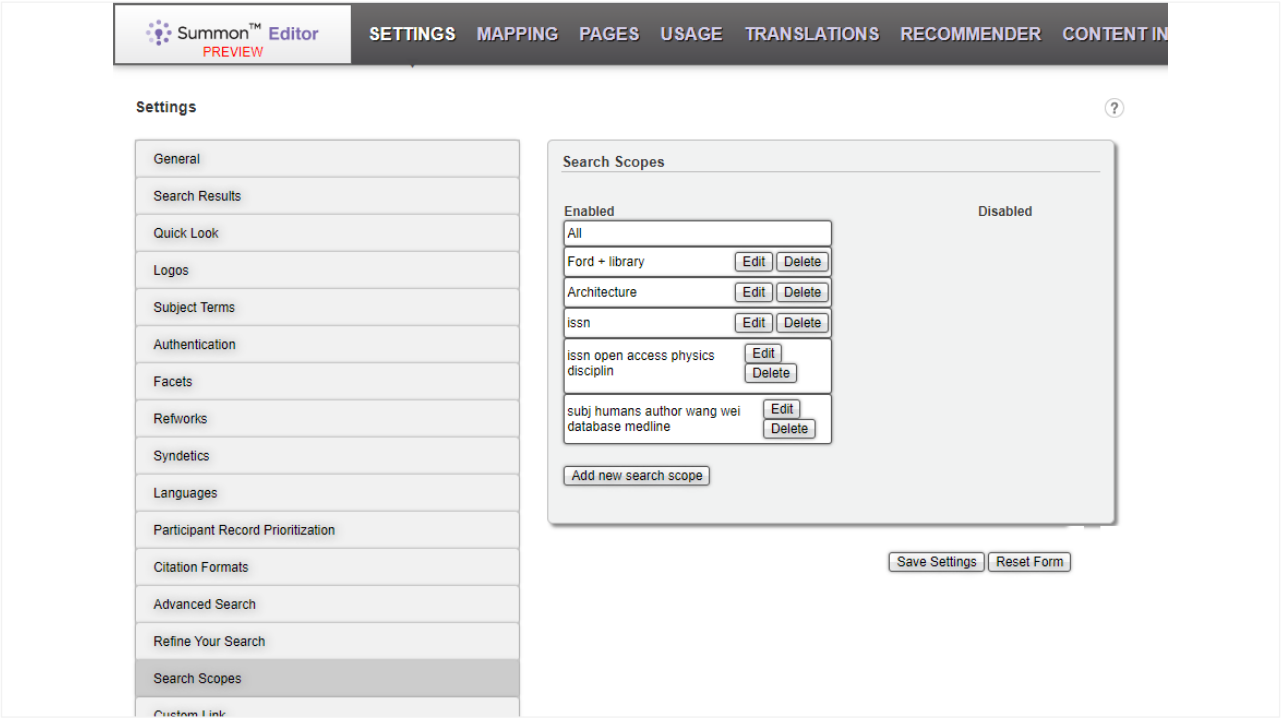
Scopes for Summon Searches

How to Configure Search Scopes for Summon

- Controls for Search Scopes is found in the Admin Console under Settings > Search Scopes
- Existing Scopes will appear at the top and can be enabled, disabled, edited, or deleted

2023 Q3



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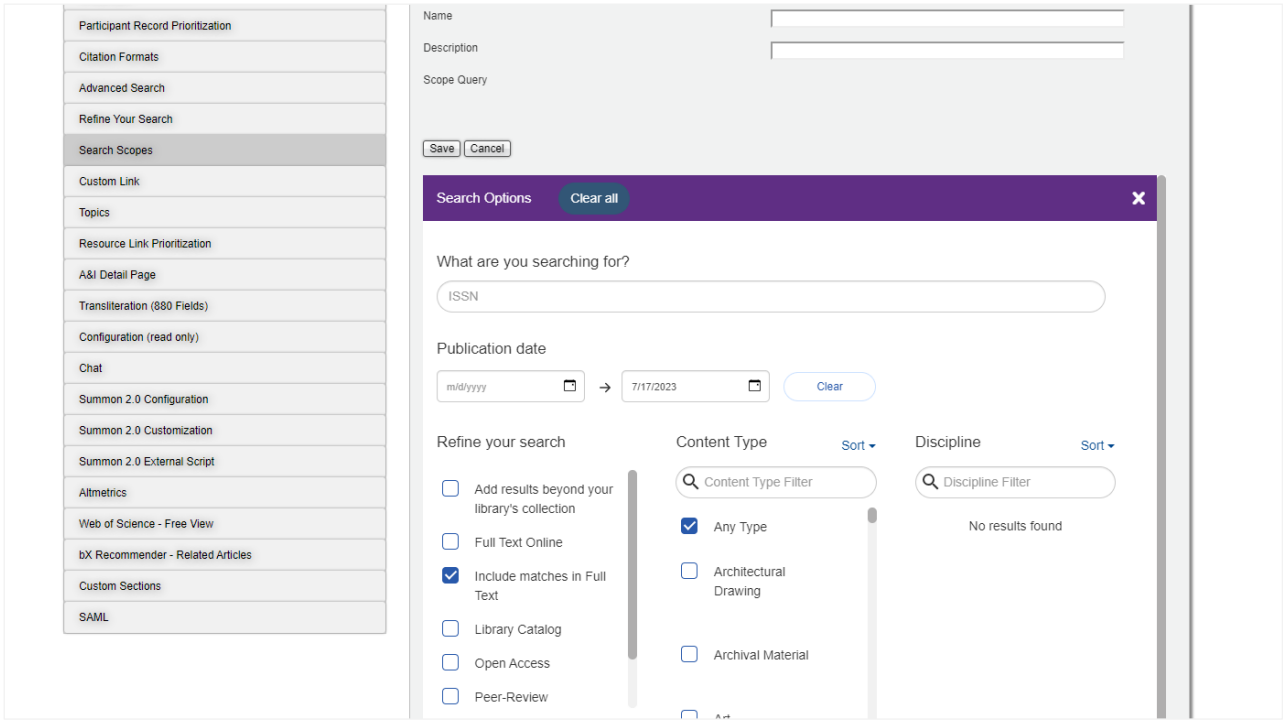
Scopes for Summon Searches

How to Configure Search Scopes for Summon

2023 Q3

- To create a new Scope, click on the Add New Search Scope button at the bottom
- A form similar to the advanced search form will appear
- Fill out the Name (which will display in the Scope Dropdown on the search page) and Description (for your internal use)
- Complete the form and save to create a new scope



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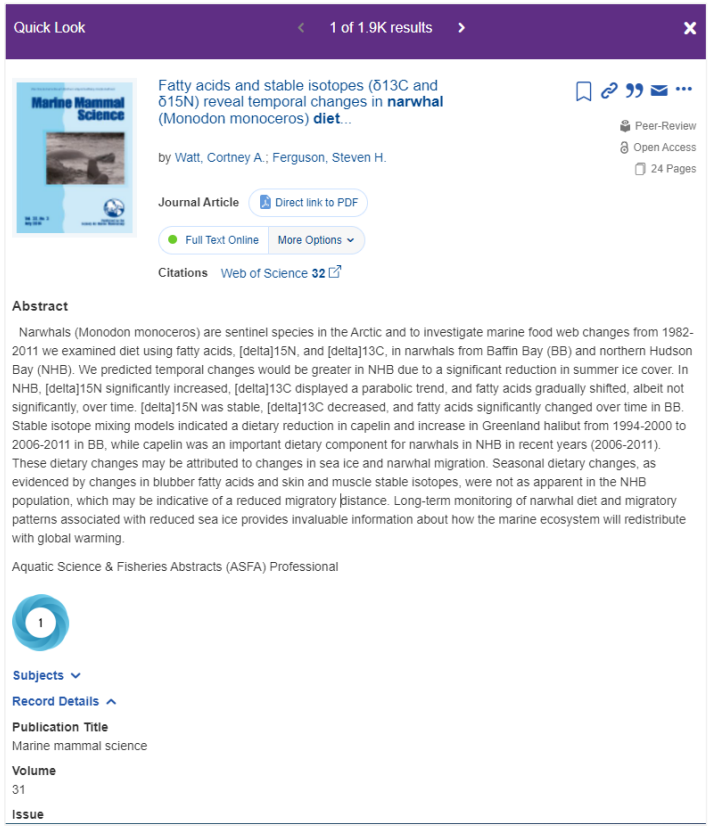
Improve the Quick Look Pane Layout

A more flexile layout to accommodate various metadata

- Usefulness of Quick Look pane varies based on the amount and type of metadata available for display
- Adjust the layout so the Quick Look displays all information well regardless of what information is absent or present

NERS



2023 Q3

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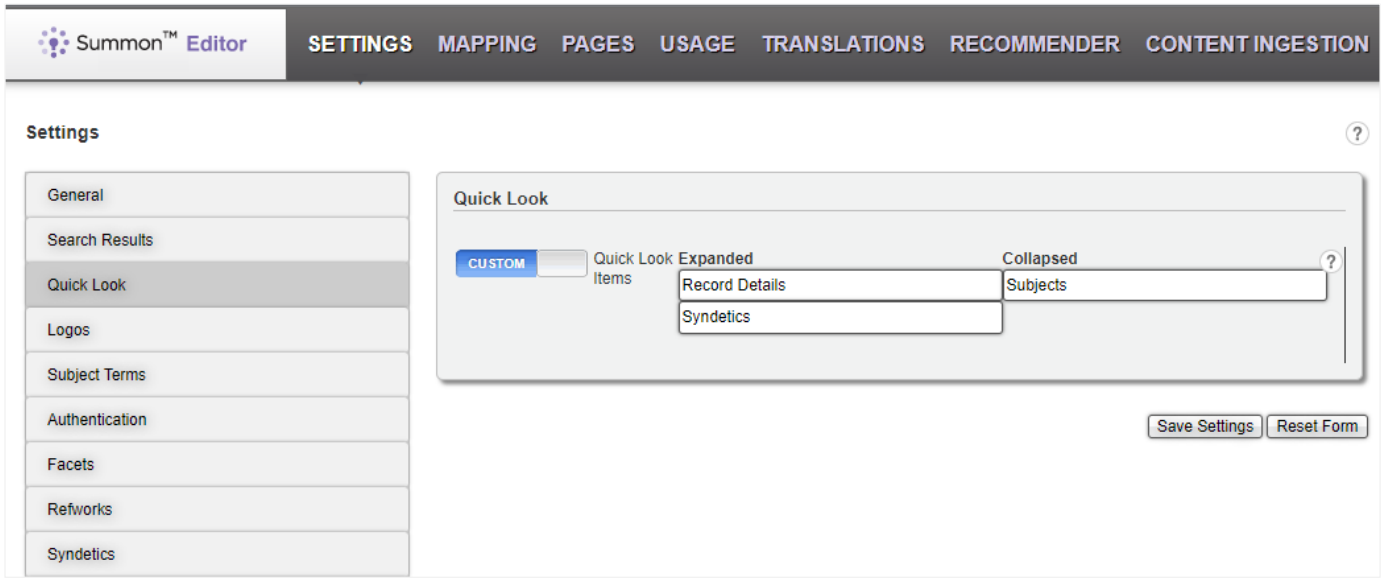
Improve the Quick Look Pane Layout

How to Configure The Quick Look Pane

2023 Q3

- You can manage some aspects of the Quick Look pane in the Admin Console, under Settings > Quick Look
- Set which elements are expanded or collapsed by default by dragging and dropping the Quick Look element into the appropriate column
- Be sure to save your settings



NERS

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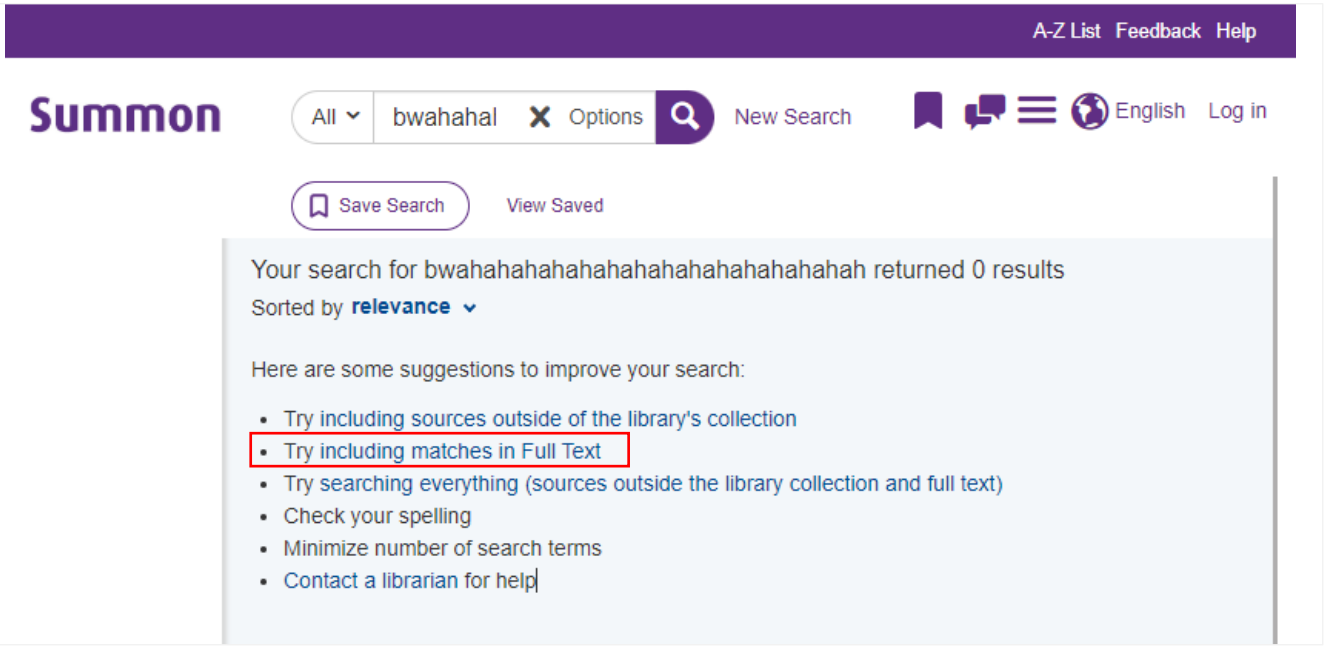
“Include Matches in Full Text” to Search Suggestions

Improve the user experience on the Zero Results Page

- Add the ability to apply the “Include Matches in Full Text” facet via a link on the Zero Results Page
- Option will appear automatically if Include Matches in Full Text is set to on and the search does not already include Full Text facet

2023 Q3



NERS

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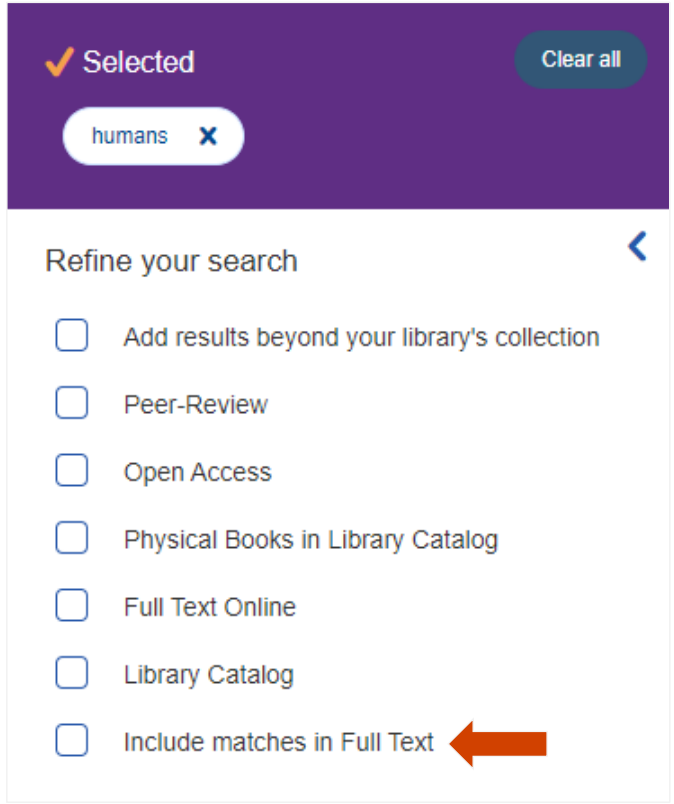
“Include Matches in Full Text” to Search Suggestions

Appearance on Zero Results page is contextual

- Will only appear if Including Matches in Full Text is an option under Refine Your Search and the search doesn’t already have it applied

NERS



2023 Q3

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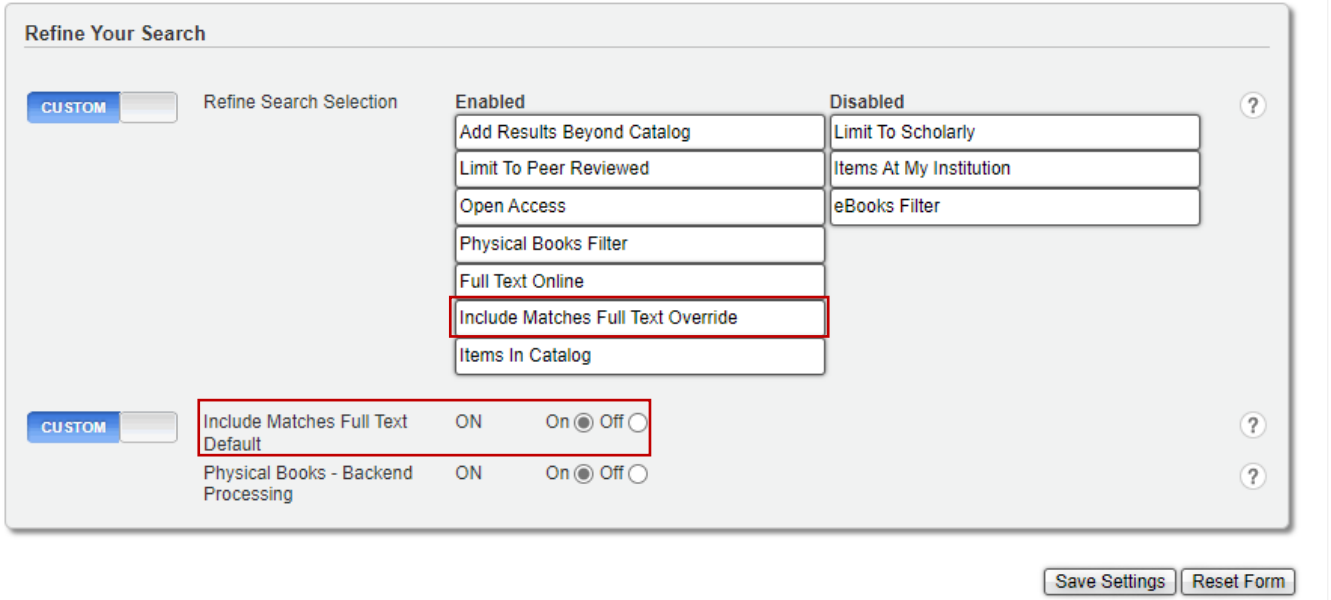
“Include Matches in Full Text” to Search Suggestions

How to Configure

- Include Matches Full Text Default should be set to On
- The Include Matches Full Text Override facet should be enabled
- The link will appear on the Zero Results Page only if the facet isn’t already applied

2023 Q3



NERS

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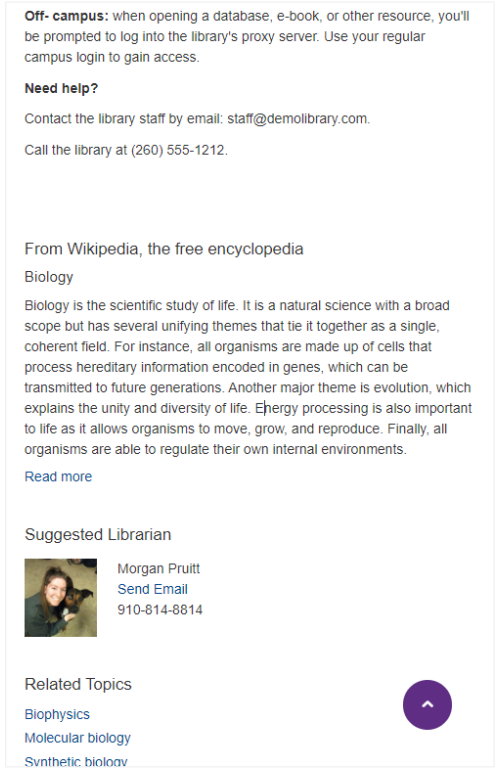
Ability to Customize of Elements in the Right Pane

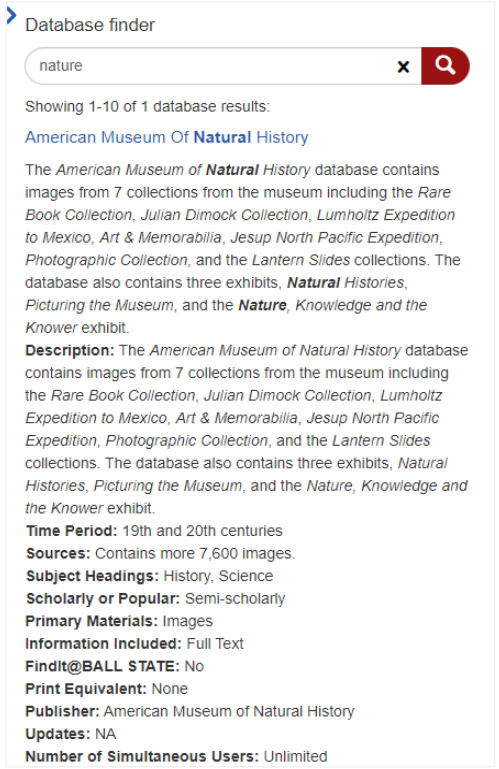
Improve the layout options for the right-hand pane

- Allow flexibility for number of results displayed by the Springshare Database Finder widget
- Allow institutions to determine order of display for Database Finder, custom panels, and Topic Explorer

2023 Q3

NERS





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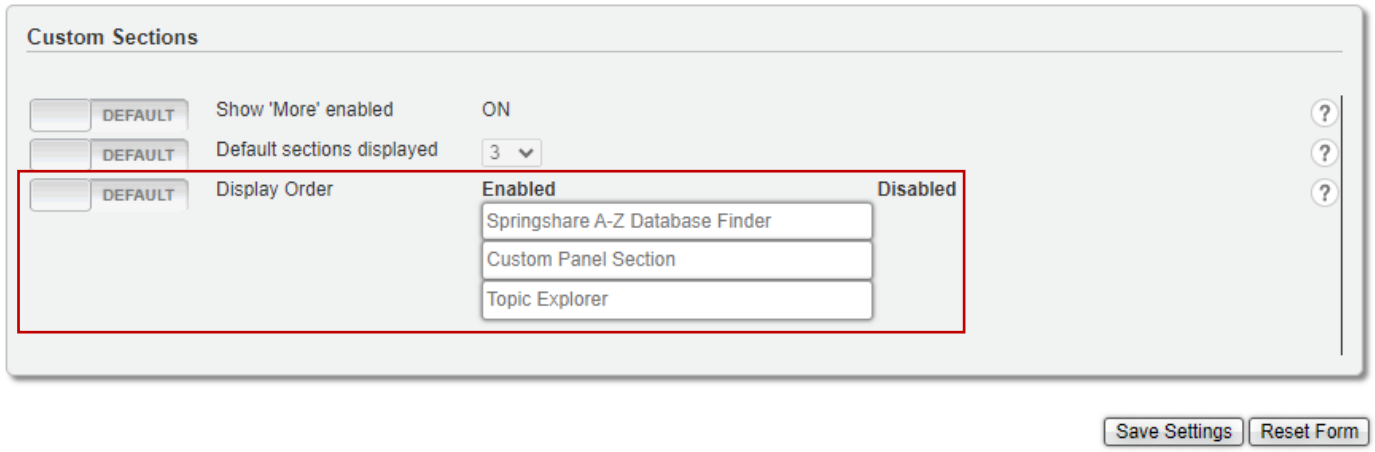
Ability to Customize of Elements in the Right Pane

How to Configure Order of Elements

2023 Q3

- Controls for the order of elements in the right pane can be found in the Admin Console, under Settings > Custom Sections
- In addition to the ability to configure the appearance of the More link and number of sections displayed before the link, you can now enable, disable and determine the order of the major elements

NERS



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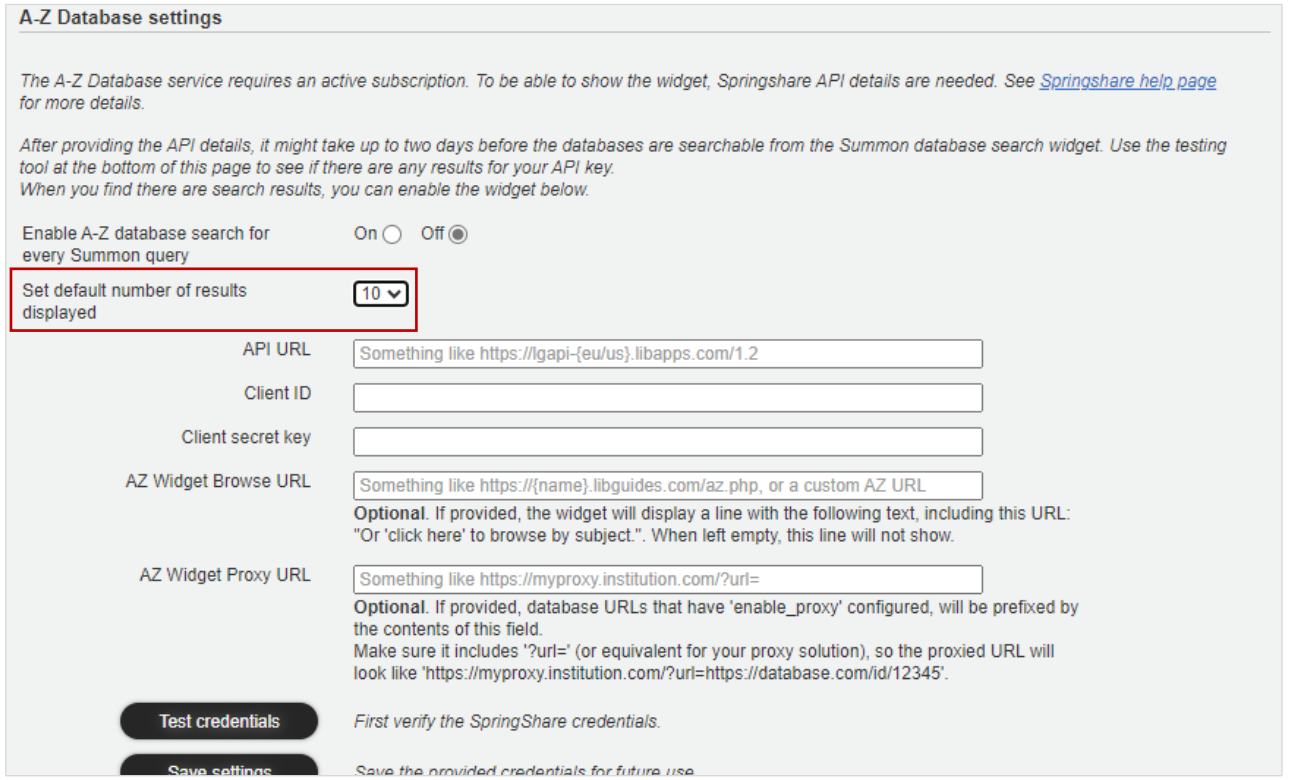
Ability to Customize of Elements in the Right Pane

How to Configure Database Finder

- In the Admin Console, under Recommender > Springshare, in the section A-Z Database Settings
- You can now determine the number of results returned

2023 Q3



NERS

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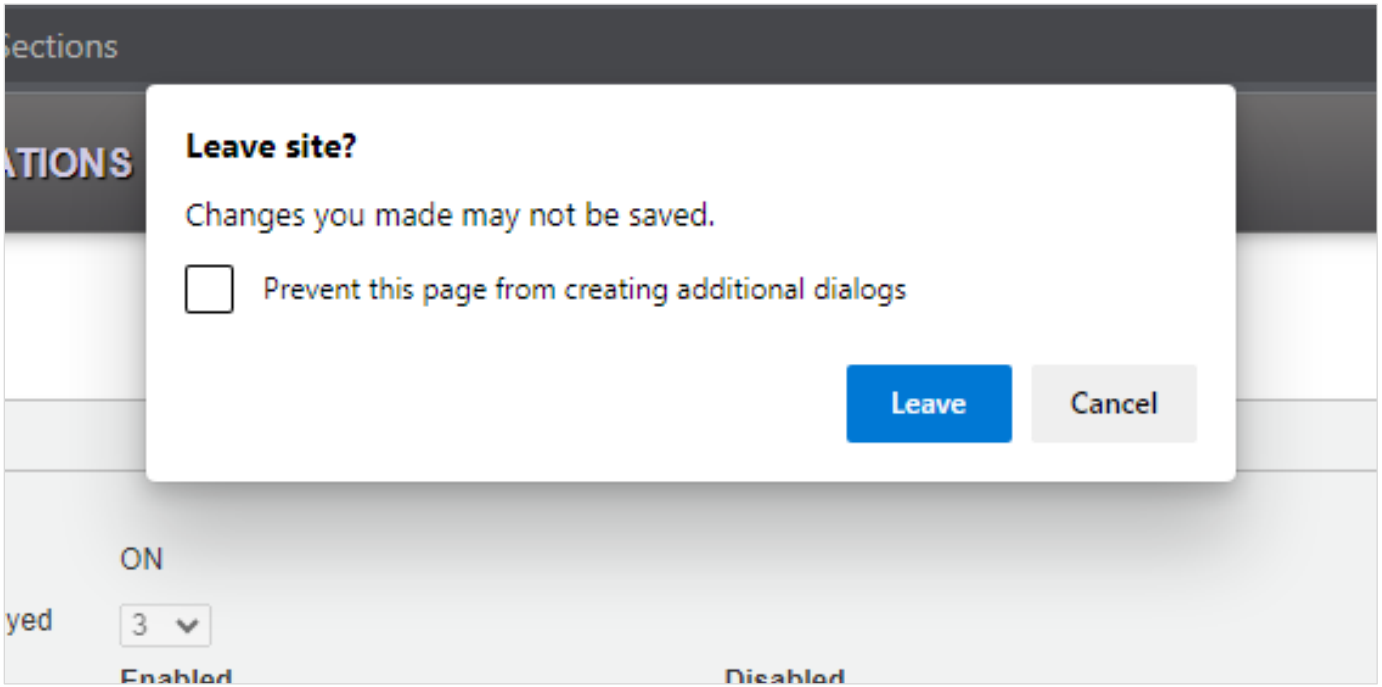
Warning to Save Changes

How to Configure Database Finder-k

2023 Q3

- If you make changes on an Admin Console page and navigate away before saving, you'll now get a warning that prompt you to save before leaving



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November Quarterly Release

Display 5xx Note Fields in Summon

Allow institution to add 5xx note fields to Quick Look

- Display both a label for and the value in the field for a result
- If the field is blank, it and its label should not be displayed

* Display of fields may require mapping and content processing and require implementation assistance by Ex Libris for each institution

NERS

2023 H2

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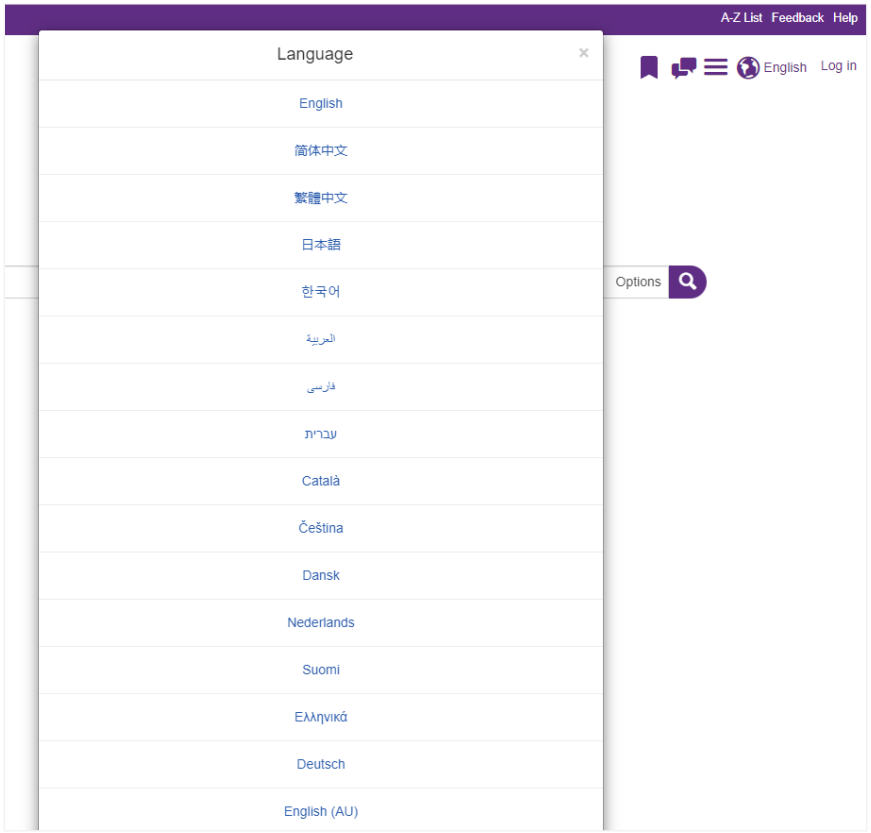
Ability to Match Language Settings of Summon with 360 Link

Ensure language parameter is passed from Summon to 360 Link

- Language set by the user in the Summon user interface will also be applied in 360 Link to maintain the selected language



2023 H2

NERS

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Prevent eBook and Computer File Records from Merging

Ensure language parameter is passed from Summon to 360 Link

- Prevent Computer File records to merge with any other Content Type
- Only allow Computer File type records to merge with each other

2023 H2

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Ongoing Improvements

Other

Accessibility

Analytics

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CDI Improvements

CDI Data Quality and Rights enhancements

CDI Rights Processing

- Reduce to 24 – 30 hours average

Data quality

- Improve consistency of language and publication date fields
- Better identification of book reviews
- Improve OA-handling, with the addition of Unpaywall as an indexed collection

Bigger, longer term data projects

- Addition of secondary resource types for CDI
- Connect author names to ORCIDs (possibly other IDs) and normalize the author name
- Separate keywords and (normalized) subjects

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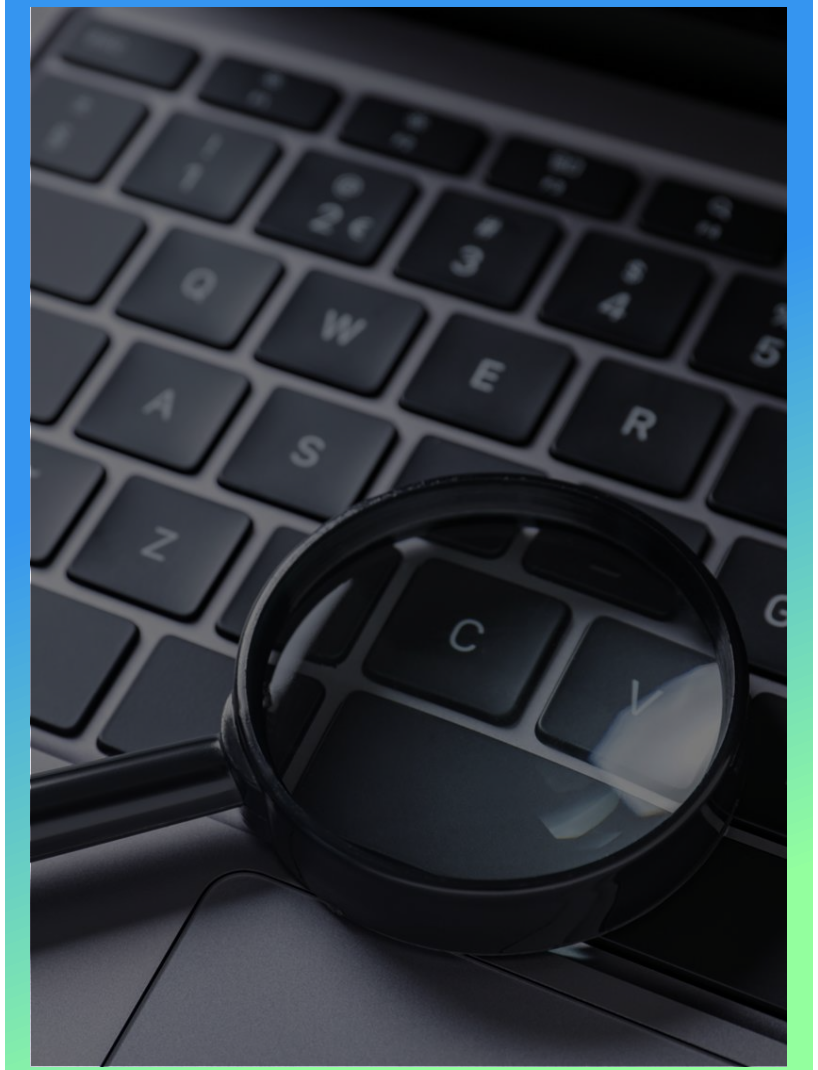
Search and Ranking



Known item search enhancement with AI

Use of an AI-based tool to identify and parse citations for more accurate results

Support of Melingo (Hebrew Search Plugin) in CDI

Ongoing enhancements based on feedback and new content

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Quicklinks

Adding more content providers is 2023 priority

Now with **39** supported providers

Over **16,304 collections** with 1.56 billion records

Linking success rates – **99%**

Provider	Content	Type of Quicklink (PDF/HTML)
ACM Digital Library	All	PDF
Elsevier	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 in the article)
SAGE Publications	Journals under https://journals.sagepub.com	PDF, HTML
Springer Nature	Journals and Books under https://link.springer.com	PDF, HTML
Wiley-Blackwell	Journals and Books under https://onlinelibrary.wiley.com	PDF, HTML
Bloomsbury	Journals Content under https://bloomsbury.com	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/	PDF, HTML
Thieme	All journal content besides conference proceedings under https://www.thieme-connect.de/products/journals/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
University of Chicago Press		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	Journals Content 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
Cambridge University Press	Journals, Books	HTML
American Chemical Society	Journals, Books	PDF, HTML
高等教育出版社 (Higher Education Press)	Journals	HTML
American Society for Microbiology	Journals	PDF, HTML
INFORMS	All	PDF, HTML
Edinburgh University Press	Journals under https://www.euppublishing.com/	PDF, HTML
Harriman	Books	HTML
O'Reilly Media, Inc	Books	HTML
USPTO	Published applications and issued patents available under https://ppubs.uspto.gov/pubwebapp/static/pages/ppubsbasic.html	PDF

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

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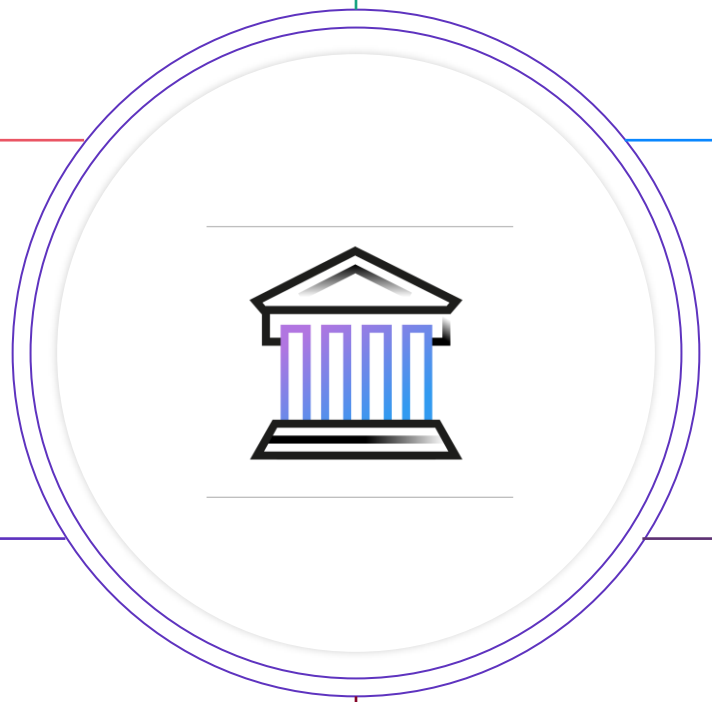
360 and Intota: the Idea Exchange Edition

2023 Roadmap Highlights



Auto-Holdings Management with KBART Recommended Practice

API Expansion for Integration with External Systems

Infrastructure Investment

Accessibility

NERS Project
Open Access Indicator
Access to Summon Analytics

Response to Community Reports

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Quarterly Release Dates

- February 1
- May 3
- August 2
- November 1

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Q3: Idea Exchange

NERS

- Auto-Holdings Management with Taylor & Francis is live!
- NERS Open Access indicators for databases and titles
- Add non-admin permission and link to Summon Analytics in 360 Client Center and Intota

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eBook Auto-Holdings for Taylor & Francis

- You can now configure auto-holdings management for ebook titles in **Taylor & Francis eBooks A-Z** (JTX)
- Weekly updates – Saturday/Sunday
- Ex Libris calls a T&F API endpoint and retrieves a KBART-formatted file of your holdings

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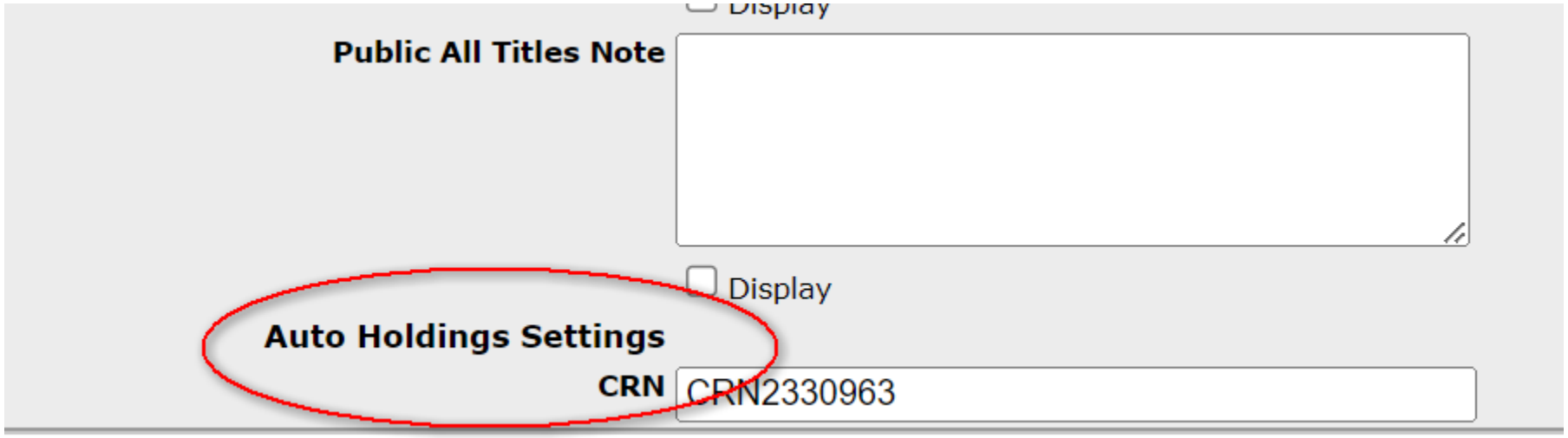
360 Configuration: Database Details



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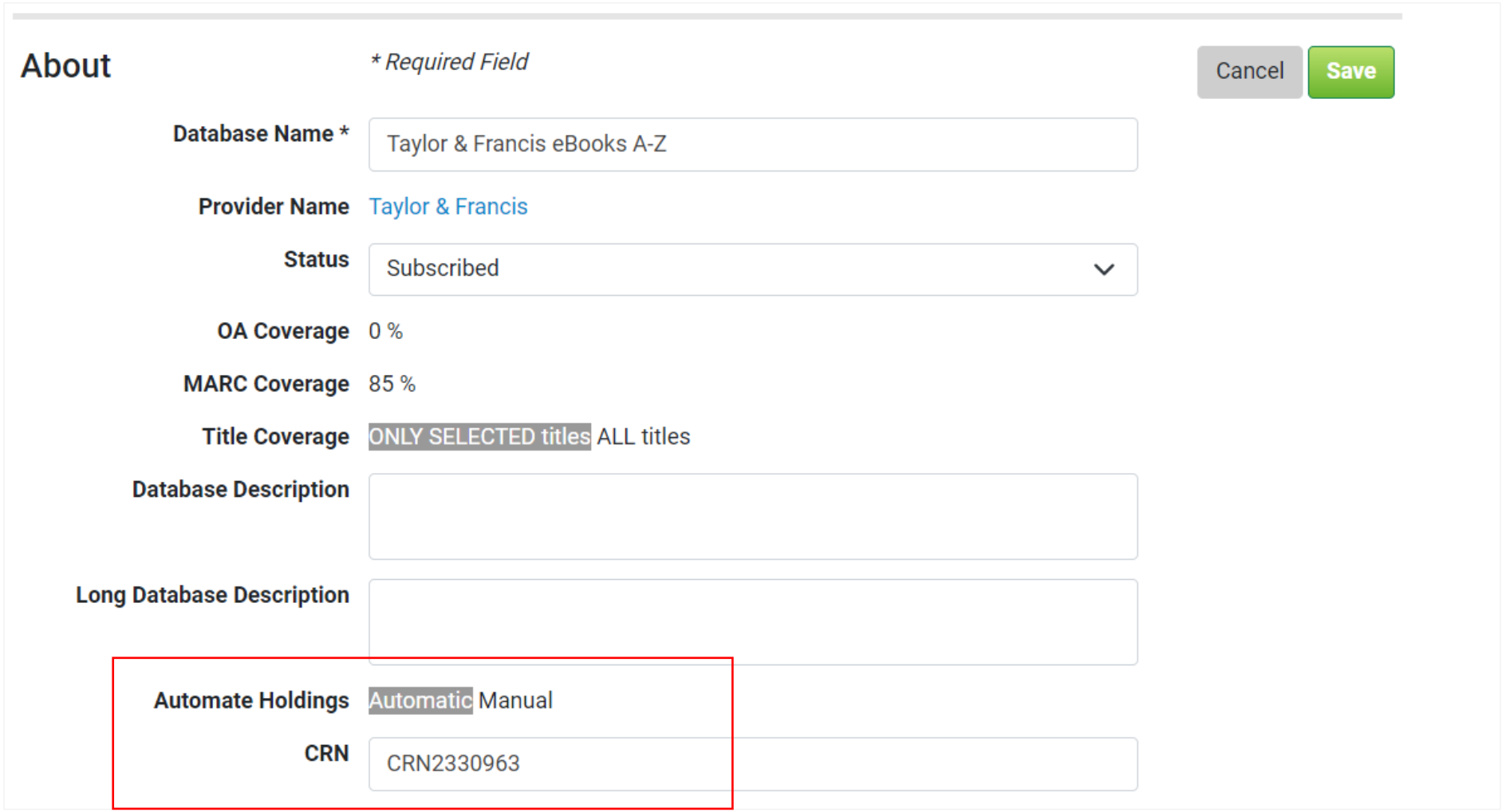
Intota Configuration: Database Details



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Open Access Indicators for Databases and Titles

NERS

- **Quickly and easily identify Open Access resources in the 360 KB!**
  - Open Access coverage % displays in search results and Data Management (360) or Databases list (Intota)
  - Open Access coverage % displays on the database details page
  - Open Access indicator displays on the titles list and at the individual title level

- **Ulrich's is the information source**

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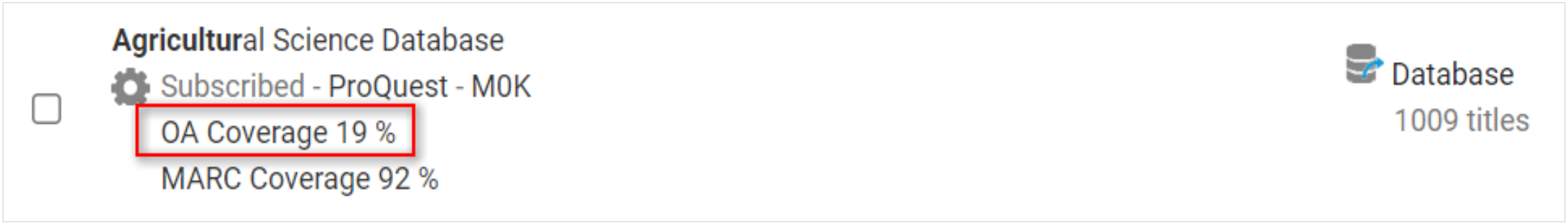
Open Access Integration in Intota



- Percentage of titles in database that are marked OA
- Search results
- Subscribed databases list

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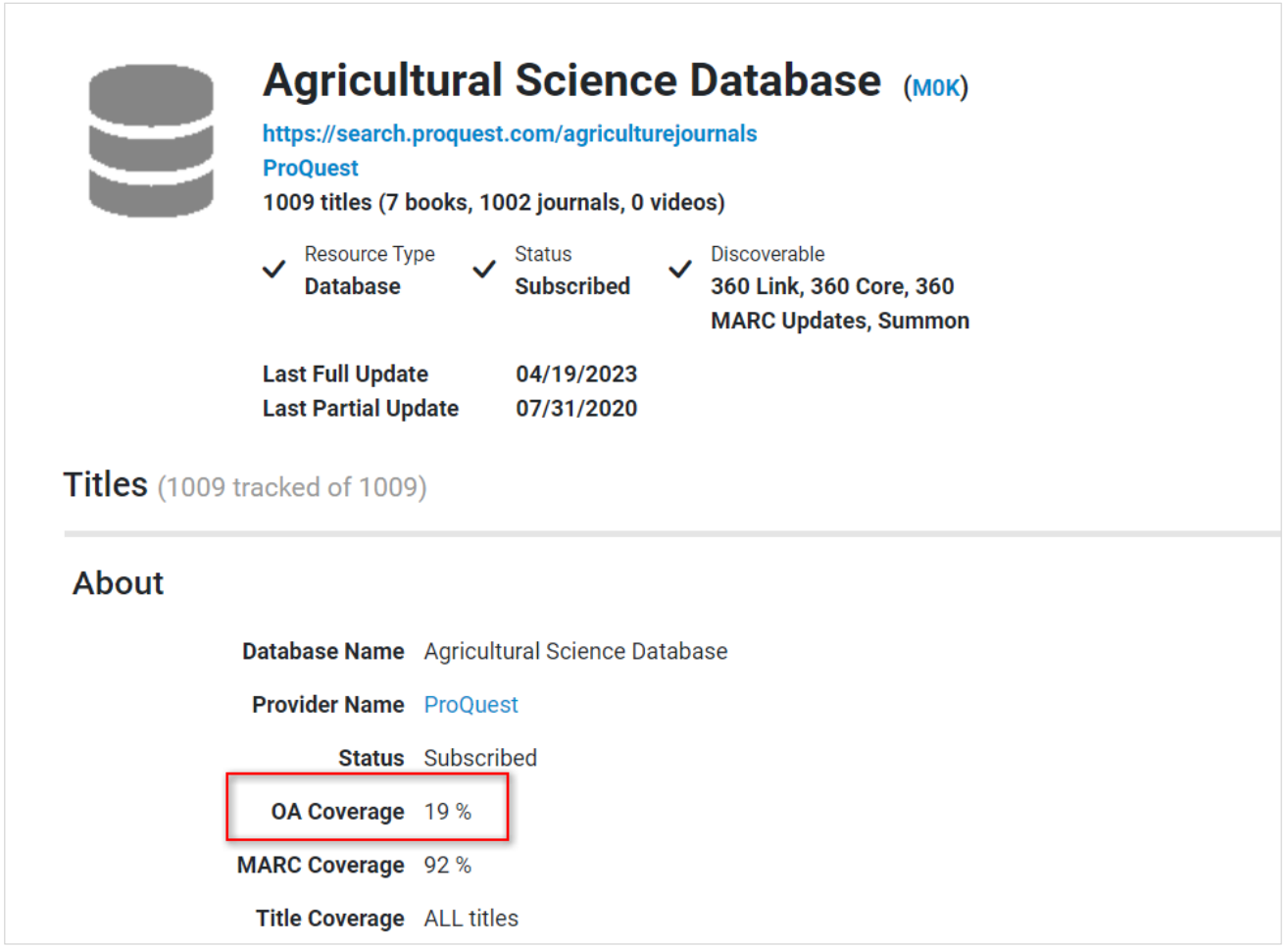
Open Access Integration in Intota



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Open Access Integration in Intota

Title	Identifier	Type	Status	Date(s)	Custom Date	OA	Collection	More
ACTA AGRICULTURAE SLOVENICA	1581-9175	eJournal	Subscribed	08/01/2007 to 12/31/2013		Yes		View Details
Acta Agronómica	0120-2812	eJournal	Subscribed	01/01/2004 to present		Yes		View Details
Acta biológica colombiana	0120-548X	eJournal	Subscribed	01/01/2004 to present		Yes		View Details
Acta biologica Cracoviensia	0001-5296	eJournal	Subscribed	01/01/2010 to present		Yes		View Details
ACTA BOTANICA CROATICA	0365-0588	eJournal	Subscribed	01/01/2011 to 07/31/2019		Yes		View Details
Acta Facultatis Xylologiae Zvolen res Publica Slovaca	1336-3824	eJournal	Subscribed	07/01/2013 to present				View Details
Acta Scientiarum Polonorum. Formatio Circumiectus	1644-0765	eJournal	Subscribed	01/01/2014 to 01/31/2018		Yes		View Details
Acta Scientiarum. Agronomy	1679-9275	eJournal	Subscribed	01/01/2015 to present		Yes		View Details
Acta scientiarum. Animal sciences	1806-2636	eJournal	Subscribed	01/01/2015 to present		Yes		View Details
ADVANCES IN ANIMAL BIOSCIENCES	2040-4700	eJournal	Subscribed	04/01/2010 to 04/30/2020				View Details

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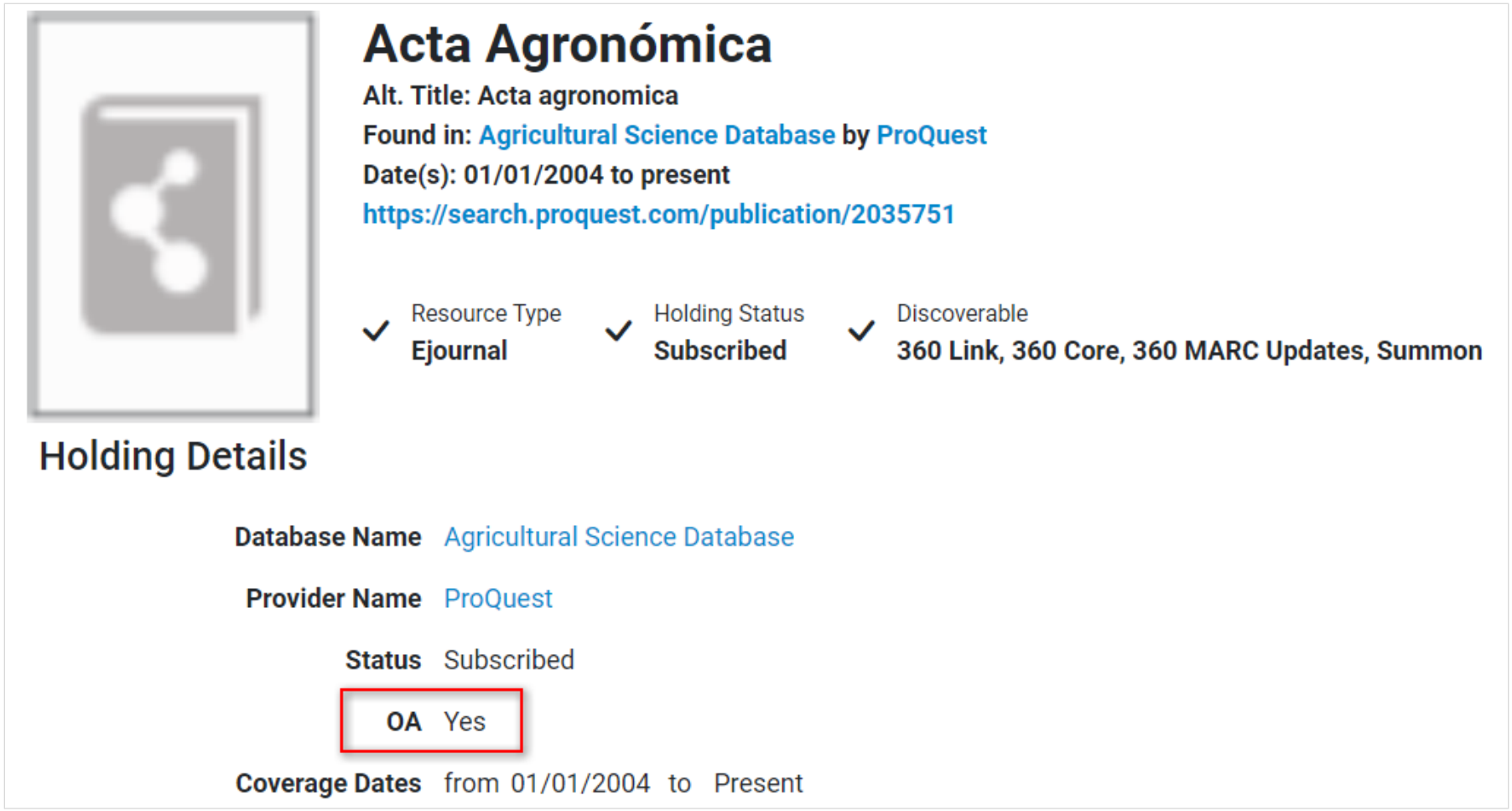
Open Access Integration in Intota



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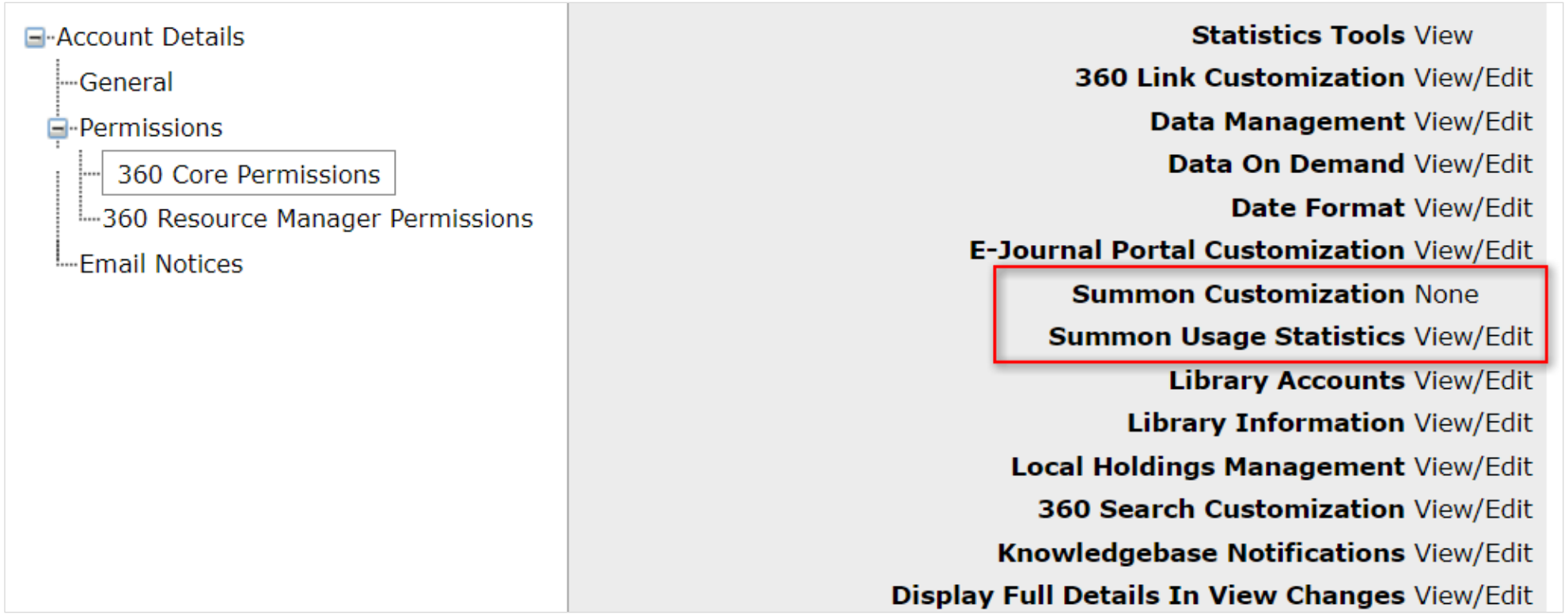
Non-Admin Link to Summon Analytics

Assign independent permission to users so they can only access Summon Analytics directly from 360



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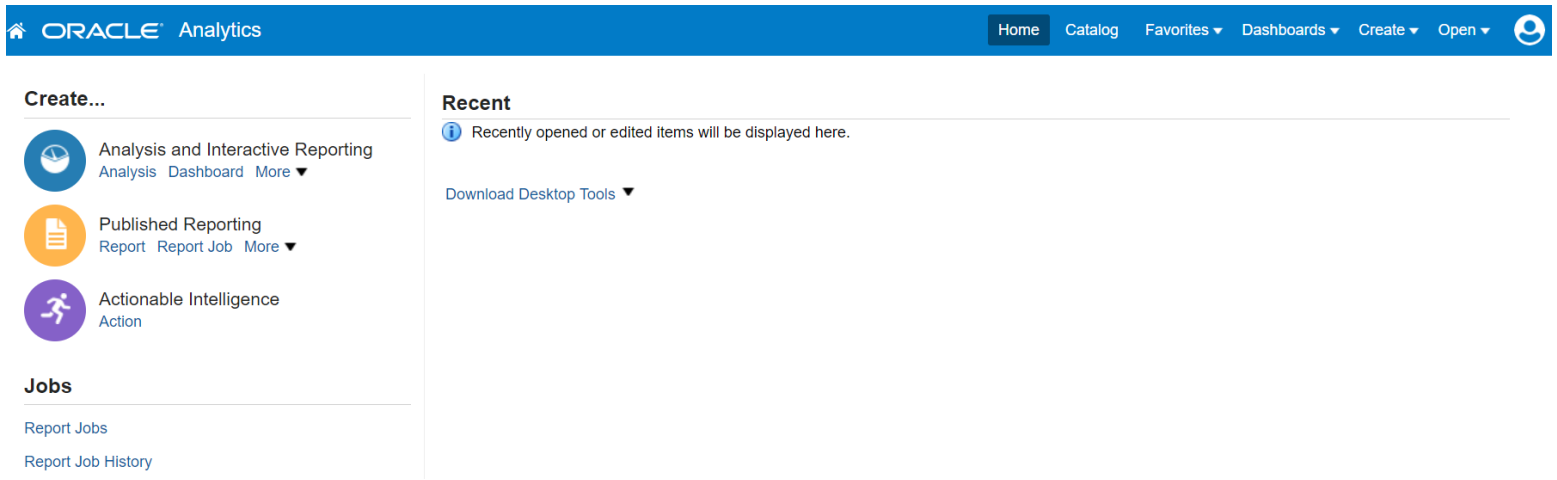
Non-Admin Link to Summon Analytics

Business Intelligence Tools

360 Usage Statistics
Overlap Analysis
Data On Demand
Management Reports
Intota Assessment

COUNTER Configuration
Ulrichsweb Usage Statistics - New Platform
Ulrichsweb Usage Statistics
Summon Usage Statistics



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What's Next in 2023?

- Auto-Holdings Management with Springer
- Add Open Access indicators to Management Reports
- Full release of the 360 Admin API to retrieve:
  - Providers, databases, and holdings
  - Databases and holdings by provider
  - All holdings
- Summon Analytics link in Intota

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Community Engagement

Community Engagement

- Planning for 2024 Roadmap already underway

- Ways you can get involved
  - Idea Exchange
  - NERS voting

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Questions?

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