Customizing Summon

January 13, 2016

Sharai Perkes, MLIS
Senior Training and Consulting Partner

Agenda

- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to Content
- Reporting
- More Ideas

Customize Your Users' Summon Experience!
Access the Summon Administration Console via Intota

Access the Summon Administration Console via Client Center

Seven Summon Administration Console Tabs

- **Settings**: Customize the look, feel, and behavior of your Summon service.
- **Mapping**: See a read-only view of your catalog mappings.
- **Detail Page**: Turn on the optional display of your catalog records within Summon.
- **Usage**: Explore Summon Usage Reports.
- **Translations**: Customize text in Summon's 34 languages, including English.
- **Recommender**: Configure database recommendations and create Best Bets.
- **Content Ingestion**: Receive content ingestion reports for your Summon content.

Check out the Summon Administration Console User Guide in the ProQuest Support Center!
Using the Administration Console

1. Move sliders from DEFAULT to CUSTOM for making changes.

2. Scroll to bottom of page, and click the Save Settings button.

Most saved changes take effect within five minutes!

Agenda

- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to Content
- Reporting
- More Ideas

Spruce up Logos and Header Links

Favicon
Page Title
Custom Link can be text or an image.

Small Logo
A Large Logo goes on the home page. Both logos can be hyperlinked.
**Settings for Logos and Header Links**

Remember to add a Feedback Email Address.

About link retired in Summon 2.0.

Sizing is important for the Small Logo.

Scroll toward bottom of page to find Custom Link section. Use it for anything you like.

**Offer Users a World of Languages**

Enable up to 34 Languages for your users.

Or, add a default language to your Summon URL, such as this for Canadian French: [http://library.summon.serialsolutions.com/fr-CA/](http://library.summon.serialsolutions.com/fr-CA/)

**Customize Text to Reflect Your Library's Character**

Before:

Use Translations tab to customize your text!

Filter to find text to translate.

After:

Click to Edit text.
Color Your Summon

Authentication banner shows for off campus users. Make it pop with color!

Write your own script? Link to your file in the Summon 2.0 External Script section.

Authentication Banner Tip

Leave the Banner URL blank. Summon uses the Proxy URL in your Client Center’s Library Settings area!

Agenda

- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to Content
- Reporting
- More Ideas
Activate Refinement Options

- Configurable options.

Modify Advanced Search Options

- For the best user experience, make these Advanced Search options match the ones available in Refine Your Search.

Fine Tune Your Facets

- Contextual Facets appear for books and catalog items.
- Whitelist makes a location appear among top five values.
Agenda

- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to Content
- Reporting
- More Ideas

Bring Your Holdings to Life with Syndetic Images and Content

Sources:
- Credo Reference
- Encyclopedia Britannica
- Gale Virtual Reference Library
- Wikipedia

Contact us to request changes in the precedence of your Topic sources.
Save Citations Directly to ProQuest Flow RefWorks

- Prompt user to create a free Flow RefWorks account.
- Log in to Flow RefWorks.
- Click icon to save citation to Flow RefWorks.
- Turn Flow RefWorks integration On or Off.

Flow will become the new RefWorks on January 18, 2016!

Enable Export to SIPX Reading List Module

- Make it easy for faculty to discover, set up, and assign course readings.

- Activate SIPX button.
- Activate SIPX menu item.

Select Citation Styles to Offer

- Disable citation styles not needed by your users.
- Set inactivity timeout in minutes.
Coming Soon: Altmetric Integration

- Metrics about an article's impact as expressed through online, social media and news mentions.
- Free version available to all Summon libraries.

Agenda

- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to Content
- Reporting
- More Ideas

Engage Users Via Integrated Chat (SpringShare or LibraryH3lp)

Click to chat with a Librarian.
Database Recommendations

Two recommendation engines:
- Algorithm based
  - Metadata driven
  - Purely automatic
- Tag based
  - Add your own tags
  - Block community tags
  - Exclude a database from tagging

NOTE: Not all databases are available.

Recommender: Tag Your Databases

Edit tags or turn off tagging for individual databases.

Block community tags.

Add your own tags.

Make Anything a Best Bet!
Recommender: Create and Edit a Best Bet

- Only one Best Bet will display per tag. So, do not reuse tags.
- Add as many tags as you like. Search term(s) must match perfectly.
- Edit or remove a Best Bet.

Recommender: Import Best Bets

- 1. Select a CSV file to import.
- 2. Import the file.

Agenda

- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to:
  - Provider Content
  - Catalog Content
  - Abstracting & Indexing Content
- Reporting
- More Ideas
Index Enhanced Direct Linking (IEDL) to Provider Content

When possible, Summon links directly to full text.

If a direct link is not available for an item, Summon will use your link-resolver.

If multiple providers support a direct link to an item, Summon chooses randomly.

...but, only our earliest 105 direct link providers are on this list, so you may not want to fuss with this.

You can prioritize one provider over another by ordering them...

Agenda

- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to:
  - Provider Content
  - Catalog Content
  - Abstracting & Indexing Content
- Reporting
- More Ideas

Your Summon Catalog Detail Page

Two options for catalog records:
1. Link to catalog from results page
2. Link to Summon Catalog Detail page

Catalog Detail page integrates with Syndetics Plus content.

Even if you choose linking to catalog, you can use the Summon Catalog Detail page during catalog maintenance.
**Catalog Detail Page**

Two buttons, independently available:
- **Reserve** (opens catalog to this item)
- **Request** (opens Link Resolver or Interlibrary Loan system with this item)

Note: Same Request (ILL) button is on the Abstracting and Indexing Detail page, described later.

**Turn On Detail Pages**

- Enable your Catalog and A&I Detail pages.
- Enable catalog “Reserve” button.
- Enable Interlibrary Loan “Request” button. URL can be anything that supports OpenURL; for example, your link-resolver.
- Add any desired custom text.
- Choose and order sections of additional content.

**MARC and Location Mappings**

Read-only view of MARC mappings.

Need to make changes? Download and edit your mappings in Excel. Remember to highlight your edits before you send them to the ProQuest Support Team.
Mapped Call Number Settings

If your call numbers do not appear as expected, please contact the ProQuest Support team for assistance.

Agenda

- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to:
  - Provider Content
  - Catalog Content
  - Abstracting & Indexing Content
- Reporting
- More Ideas

Want to Hide “Citation Online” A&I Content?

- You can exclude “Citation Online” content from search results.
- Setting takes effect in two to four days.

- Excluded content shows when user checks the Add results beyond your library’s collection box.

Choose the approach that meets your users’ needs.
Prevent user frustration:
- Enable ILL Request button so the patron knows what to do next.
- Controlled by same settings as the Request button on Catalog Detail page.

Custom button text ideas:
- Custom note text idea:

Note: Full text of this item is not available online. Use the buttons to the right to find the item in print or request it via Interlibrary Loan.

Primary Action: orange button links to catalog.

Can change Primary Action so Request (ILL) button is orange and on top.

To find Get Journal Article on the translations tab, search for:
- Get % (type)

Agenda
- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to Content
- Reporting
- More Ideas
Summation Usage Reports

- **Report Types:**
  - Visits and Searches Tracking
  - Top Queries
  - Visitor Profiles and IT

**Want more detailed statistics?**
Add your Google Analytics Tracking Code to Summon.

**Having trouble seeing Usage Reports in your browser?**
See the Support Center for help at Summon: Usage Reports.

---

Turn on Content Ingestion Reports

- **Reports include summary data and instructions for any errors encountered.**
- **Subscribers receive reports via email.**

---

**Agenda**

- Introduction to the Summon Administration Console
- Look, Feel, Text, and Translations
- Refinements and Facets
- Integrated Content and Citation Tools
- Connecting with Users and Sharing Your Expertise
- Linking to Content
- Usage Reports
- More Ideas
Create Widgets and Search Boxes

- Interactive Search Widget
- Compact Search Box
- Pre-scope your search box or widget.

Find your widget builder at:
http://library.summon.serialssolutions.com/widgets

For secure sites, find your widget builder at:
https://library.summon.serialssolutions.com/widgets

If you can copy & paste, you can put a search box or widget on any web page!

Want More Ideas?

From ProQuest
- Summon LibGuide: Tips, videos, and instructions for users and librarians alike.
- Summon Webinars: Product updates, topical trainings, and other sessions with Summon staff.
- Support Center: Documentation, links to videos, access to the Support team, and more!

From Other Libraries Using Summon
- Summon listserv: Lively email conversations among over 500 Summon libraries in more than 40 countries
- Summon Research Guide examples:
  - Michigan State University – with video training
  - Fairmont State University – with slideshow training

Customizing Summon
http://www.proquest.com/go/trainingeval

Thank You
Sharai Perkes, MLIS
Senior Training and Consulting Partner
206 336 7582
clients@proquest.com