Summon Quarterly Update and Q&A with 360 and Intota Services
July 2020

Brent D. Cook
Director of Product Management, Summon
• Review Recent Summon Improvements
• Review 2020 Roadmap
  • August Release and Preview
  • November Release
• 360 / Intota Update
• Update on Current Rights Processing
• Recent Summon Customer Survey
• Upcoming Webinars and Community Involvement
Recent Summon & CDI Improvements

Introduction of CDI and New Features
Summon 2020 Release Schedule

FEBRUARY RELEASE
- February 5th

MAY RELEASE
- May 13th

AUGUST RELEASE
- August 5th

NOVEMBER RELEASE
- November 4th

February 2020
- Introduction of CDI
- Improved performance and an upgrade to SOLR 7
- New facets
  - Author/creator
  - Collection (Database)
- Sort results by title or author
- Match & Merge improvements
- Search for authors or co-authors by ORCID IDs

May 2020
- Linked Data
- WhatsApp Integration

August 2020
- Add Section number to Course ID in Course Reserves page
- Consistent link back to search results
- Improve peer-review labeling
- Display books and ebooks edition and publication year in brief results
- Accessibility improvements for WCAG compliance

November 2020
- Clarify author and editor in results and citations
- Databases A-Z List for Summon
- Mechanism for Best Bets to 'harvest' LibAnswers FAQs (from SpringShare)
- Keep search refinements when moving to Advanced search
- Sierra Integration (Initial Phase)
Launch of the Central Discovery Index
Additional Functionality from CDI
Central Discovery Index (CDI) Launched in February

• Summon customers went live with CDI on February 5
• Includes:
  • Improved performance and an upgrade to SOLR 7
  • New facets
    • Author/creator
    • Collection (Database)
    • The ability to sort results by title or author
  • Match & Merge improvements
  • The ability to search for authors or co-authors by ORCID IDs
  • New content providers and institutional repositories
New Facets

- Author/creator
- Collection (Database)
- The ability to sort results by title or author
- Recently added items facet
- Created Do-Not Allow list for facet values
Match & Merge Improvements to Reduce Duplicates

- Added newsletters to merge process
  - Reduce the overall footprint of these content types
- Improving subtitle handling
  - Reduce number of merges prevented by variations in the subtitles
- Increased overmatch limit
  - Improves matching of records with exceptionally large numbers of duplicates
Match & Merge Improvements to Reduce Duplicates

• Relaxed language matching
  • Resolved discrepancy between Language Detected and sys_language

• Standardized quotation marks
  • Ensure different formats (" vs “ vs ”) don’t prevent merging

• Better handling of synonyms
  • Color vs. Colour
Additional Improvements
First half of 2020
Linked Data

SEARCH AND EXPLORING

Customer Value

- Leverage linked data to create relationships and better expose metadata for use within Summon and in linking to external sources

Feature Highlights

- Expose additional metadata on the details page for SEO support
Updated UI

• Detail page will also be landing page from search engine
• Needs to invite user to look around, discover more
• Provide detailed overview of the resource
• Engage user to take actions
  • Cite
  • Email
  • Save
  • Request
  • Share (twitter / Facebook / WhatsApp / Evernote / and more)
  • View in classic catalog
Updated UI

Mr. and Mrs. Bunny-- detectives extraordinaire: by Mrs. Bunny
by Horath, Polly; Blackall, Sophie 2012, 1st ed

Book temporarily unavailable, J HOR, CECH Children's & YA Books

Abstract
Middle-schooler Madeline's hippy parents have been kidnapped from Hornby Island, Canada, by foxes and Madeline, upon discovering that she can understand animal languages, hires two rabbit detectives to find them.

LibraryThing

Book Reviews

Mr. and Mrs. Bunny - Detectives Extraordinaire
by Valerie Nielsen
WhatsApp Integration

USER EXPERIENCE

Customer Value

• Use WhatsApp for chat with patrons for real-time assistance regardless of where they are accessing your content from.

Feature Highlights

• Simple integration allows for user to launch WhatsApp chat widget using WhatsApp API.
WhatsApp Integration

• Under Settings > Chat
• Enable WhatsApp Chat set to ON
• Enter the WhatsApp number and save your changes
• All chat logs and other functionality provided by WhatsApp
Summon Roadmap
Second Half of 2020
Notes on the Roadmap

• This roadmap is for informational purposes only.
• We will continue to review the roadmap for 2020, taking into consideration any impacts remote access and support may have on proposed features
• Inclusion of functionality will be based on capacity and potential risk vs benefit and will take into consideration impact to remote support
August Release
### Summon 2020 Release Schedule

**FEBRUARY RELEASE**  
- February 5th

**MAY RELEASE**  
- May 13th

**AUGUST RELEASE**  
- Live: August 5th  
- Preview: July 29th

**NOVEMBER RELEASE**  
- Live: November 4th  
- Preview: October 21st

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**February 2020**  
- **Introduction of CDI**
  - Improved performance and an upgrade to SOLR 7  
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Add Section number to Course ID in Course Reserves page

**USER EXPERIENCE**

- **Customer Value**
  - Simplify finding course materials by including section numbers with Course ID

- **Feature Highlights**
  - Display of multiple Section Numbers with each result in the Course Reserves page
Consistent Link Back to Search Results

**USER EXPERIENCE**

**Customer Value**

- Create consistent navigation experience for patrons

**Feature Highlights**

- Make return paths from advanced search, the saved folders and other elements consistent
Consistent Link Back to Search Results
Improve peer-review labeling

**User Experience**

- Quickly identify peer-reviewed content within Summon results.

**Feature Highlights**

- Clearly label peer-reviewed content
- Functionality in addition to peer review facet
Configuration of peer review labeling

• In the Admin Console under Settings > Search Results
• Controls for Open Access Indicator and Peer Review Indicator are found at the bottom of that tile
Display books and ebooks edition and publication year

**USER EXPERIENCE**

- Easily identify difference between editions of books and ebooks
- Reduce appearance of duplicates by clearly labeling editions
- Increase usefulness of metadata displayed

**Customer Value**

**Feature Highlights**

**Drugs in pregnancy and lactation**: a reference guide to fetal and neonatal risk by Briggs, Gerald G; Freeman, Roger K., 1935; Yaffe, Sumner J., 1923

2008, 8th ed.
Accessibility improvements for WCAG compliance

**USER EXPERIENCE**

**Customer Value**

- Ensure important content is accessible to all patrons

**Feature Highlights**

- Complete review of Summon User Interface for compliance to accessibility guidelines
- Improvements based on internal and external evaluation and input
November Release
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Clarify author and editor in results and citations

User Experience

Customer Value

• Better visual treatment of author and editor in results and citations

Feature Highlights

• Distinguish between author and editor in brief preview in results
Databases A-Z List within Summon

Search and Exploring

- Expose all resources they have access to for the end patron

Customer Value

Feature Highlights

- Provide pathway to discovery A to Z list of all databases
Mechanism for Best Bets to 'harvest' LibAnswers FAQs

- Easily find and implement new FAQs quickly using existing systems

- Use LibAnswers API to harvest LibAnswers to include in Best Bets
- Generate keywords using the metadata from LibAnswers
Persistent Search Refinements

SEARCH AND EXPLORING

Customer Value

• Allows for moving dynamically between basic and advanced search, bringing any refinements along with each search

Feature Highlights

• Consistency in application of facets and inputs across basic and advanced searches
• Retention of search parameters as the user moves between search screens
### Sierra Integration (Initial Phase)

**Customer Value**
- Better integration of library systems and Summon

**Feature Highlights**
- Allow for quicker, easier access to holding or checking out content
- Simplify administration by staff
Integration Solution and Scope

• Integration of Summon – Sierra includes:
  • Supporting single Summon-Sierra institution
  • Display availability (items and their availability) embedded in Summon
  • Support login in Summon
  • Allow request in BIB/Volume level
  • Display of library account in Summon, allow actions (Renew, Cancel, Edit etc).

• Target for Initial Release for Early Access partners: End Q1 2021
  • Expanding to general availability in H2 2021
Additional NERS Feature: Analysis for SAML/federated/"Shibboleth" login option
Analysis for SAML / federated / "Shibboleth" login option

**LIBRARY EMPOWERMENT**

**Customer Value**

- Saved searches is currently supported via MS OneDrive or Google Drive
- Desire for SAML-based, federated authentication option for this feature and others

**Feature Highlights**

- Analysis to determine best path forward for supporting improved integration
- Will take into consideration options for login to support Saved Searches, better integration with library services, and other opportunities
Analysis for SAML / federated / "Shibboleth" login option

• Research outputs will include:
  • Initial analysis and planning
  • Outreach to Summon community to determine needs and priorities
  • Recommendation for development of functionality and project milestones / phases

• Timing for delivery of any functionality to be determined based on inputs from analysis
360 and Intota Services Update
## 2020 Release Schedule: 360 and Intota Services

<table>
<thead>
<tr>
<th>Release</th>
<th>Date</th>
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<tbody>
<tr>
<td>2020 Q1</td>
<td>February 19</td>
</tr>
<tr>
<td>2020 Q2</td>
<td>May 13 &amp; June 10</td>
</tr>
<tr>
<td>2020 Q3</td>
<td>August 4</td>
</tr>
<tr>
<td>2020 Q4</td>
<td>November 4</td>
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</table>
360 & Intota 2020 Roadmap Highlights

**ANALYTICS**
- COUNTER r5
- Access to Summon Analytics from Client Center

**DISCOVERY & LINKING**
- Monthly linker releases
- OpenAthens Redirector
- IEDL enhancements

**USER EXPERIENCE & ACCESSIBILITY**
- Display database update time stamp
- VPAT analysis
2020 By the Numbers ... So Far

- **200+** Bug fixes
- **25+** Enhancements & Improvements
- **95M** Resolved Links (IEDL and OpenURL)
- **50+** New & updated 360 Link linkers
2020 Q3 (Maintenance Release)

- View “last updated” for databases in 360 Core/Client Center and Intota
- ScienceDirect linker
Update on Current Rights Process
Update on Current Rights Process

• We are currently working on updating the processing of rights
  • Adding more customers to the process
  • Improving throughput and error handling

• During this time rights may take up to 72 hours to process
  • Change from 24 – 48 hours
  • Change is to ensure reliability

• We will notify you when this timeframe changes
Recent Summon Customer Survey
Survey Respondents

- Survey Starts: 161
- Institutional profile:
  - ~70% using 5+ years
  - ~30% using the API
- Analyzed value/usage of:
  - Search and Exploration Features
  - Customizations and Activations
  - Integrations
Types of Questions Asked

- How libraries are using the API
- Use and Value of:
  - Search and Exploration Features
  - Customizations and Activations
  - Integrations
- Which aspects of Summon are most impactful
- Needed improvements to specific features to increase use
- Potential sharing of information/best practices
Use and Value: Search and Exploration Features

- Most valuable highlighted below

<table>
<thead>
<tr>
<th>Feature</th>
<th>Using</th>
<th>Not Aware of</th>
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<tbody>
<tr>
<td></td>
<td>Yes</td>
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<tr>
<td>Advanced search</td>
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<tr>
<td>Altmetrics</td>
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<td>Autocomplete</td>
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<td>Citation trail</td>
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<td>Database recommender</td>
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<td>12.0%</td>
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<td>Image spotlighting</td>
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<td>17.1%</td>
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<td>Journal title search from journal link</td>
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<td>Query suggestions</td>
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<td>7.0%</td>
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<td>Refine your search options</td>
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<td>Search within journal widget</td>
<td>90.2%</td>
<td>9.8%</td>
</tr>
<tr>
<td>Topic exploration (encyclopedia content)</td>
<td>89.2%</td>
<td>10.8%</td>
</tr>
<tr>
<td>Topic exploration (related items)</td>
<td>94.4%</td>
<td>5.6%</td>
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</table>
Use and Value: Customizations and Activations

• Most valuable highlighted

<table>
<thead>
<tr>
<th>Feature</th>
<th>Using Yes (%)</th>
<th>Using No (%)</th>
<th>Not Aware (%)</th>
</tr>
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<td>16.5%</td>
<td>14.9%</td>
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<tr>
<td>Facet expansion/collapse</td>
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<td>1.8%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Grouping/rollup of content types (e.g. newspapers)</td>
<td>97.1%</td>
<td>2.9%</td>
<td>7.1%</td>
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<tr>
<td>Open Access indicator</td>
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<td>4.3%</td>
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<td>Ordering of Topics Explorer elements</td>
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<td>12.2%</td>
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<td>Participant record prioritization</td>
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<td>Public notes (eResources)</td>
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<td>Public notes (location)</td>
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<td>Research article identifiers</td>
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<td>10.6%</td>
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<tr>
<td>Resource linking prioritization</td>
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<tr>
<td>Saved search</td>
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<td>6.5%</td>
<td>5.3%</td>
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<td>Selection and ordering of citation export formats</td>
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<td>Unpaywall .pdf</td>
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</table>
Use and Value: Integrations

- Most valuable highlighted below

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<td>No</td>
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<td>Alma</td>
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<tr>
<td>Browzine</td>
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<td>bX Recommender</td>
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<td>Chat integration</td>
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<td>Leganto</td>
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<td>LibGuides</td>
<td>74.8%</td>
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<td>ProQuest RefWorks institutional version (not the free version)</td>
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<td>StackMap</td>
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<td>Syndetics Unbound (beyond Syndetics cover images)</td>
<td>51.5%</td>
<td>48.5%</td>
<td>8.0%</td>
</tr>
</tbody>
</table>
Continuing the Conversation

• Leveraging responses to enhance customer education efforts
  • Feature awareness
  • API utility and use
  • Best practices
  • Integrations
• Reviewing comments on what improvements were said to be needed for use of specific features, customizations, and activations
Upcoming Webinars
Upcoming Webinars and Community Participation

• Summon Features and Functionality Refresher
  • NA/APAC: August 12 at 5:00 pm (San Francisco) and August 13 at 8:00 am (Beijing); 9:00 am (Tokyo); 10:00 am (Sydney) – register here
  • NA/EMEA: August 13 at 10:00 am (New York); 3:00 pm (London); 4:00 pm (Berlin) – register here
  • NA: August 13 at 11:00 am (San Francisco); 1:00 pm (Chicago); 2:00 pm (New York) – register here

• Also, if you have any UX feedback or studies related to Topic Explorer or Database Recommender, please send them to me
  • See listserv email for more details
  • Thanks to those who have submitted so far
Thank you!

Brent.Cook@ExLibrisGroup.com