

ExLibris
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

What's New with Summon & 360/Intota Services

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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?



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)

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



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

The screenshot displays the Wright Library search interface. A search for 'narwhal diet' is active. A dialog box titled 'Save current search and filters' is overlaid, prompting the user to sign in to save the search permanently. The dialog includes a search name field containing 'narwhal diet', a 'Filter by Publication date range' option, and three authentication buttons: 'Sign in with Google', 'Sign in with Microsoft', and 'Sign in with Campus Login'. A 'Done' button is also present. The background shows search filters and a list of results, including a link to 'COVID-19 Information & Addressing Misinformation'.

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



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


The screenshot shows an 'Email' form with the following fields and elements:

- Send email to:** A text input field.
- Choose a Citation Format:** A dropdown menu currently set to 'As shown on search results'.
- Format preview:** A preview of a citation for 'Analysis of narwhal tusks reveals lifelong feeding ecology and mercury exposure' by Dietz, Rune; Desforges, Jean-Pierre; Rigét, Frank F.; More... from Current biology, 05/2021, Volume 31, Issue 9. It includes a thumbnail image and buttons for 'Direct link to PDF', 'Full Text Online', and 'More Options'.
- From Email:** A text input field, which is highlighted with a red border in the image.
- Message:** A large text area for composing the email body.
- reCAPTCHA:** A checkbox labeled 'I'm not a robot' and the reCAPTCHA logo with 'Privacy - Terms' links.
- Buttons:** 'Cancel' and 'Send' buttons at the bottom right.

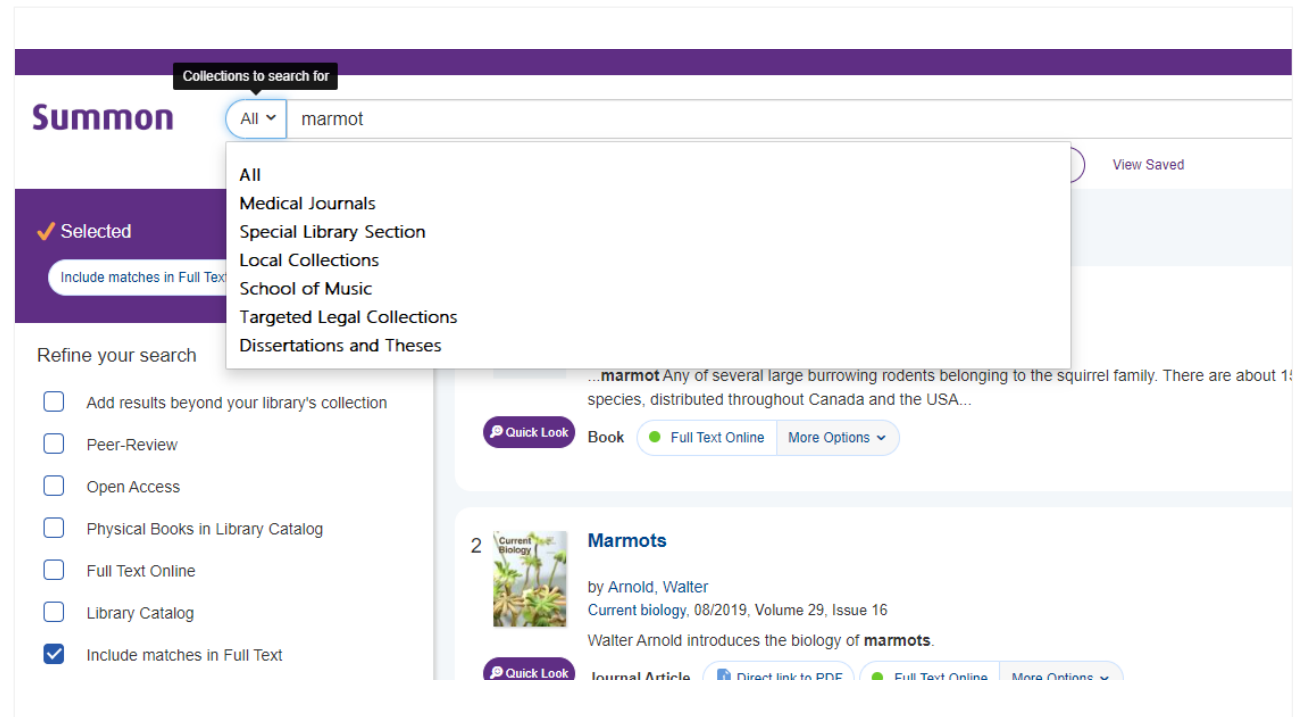


Scopes for Summon Searches

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

 2023 Q3

- 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



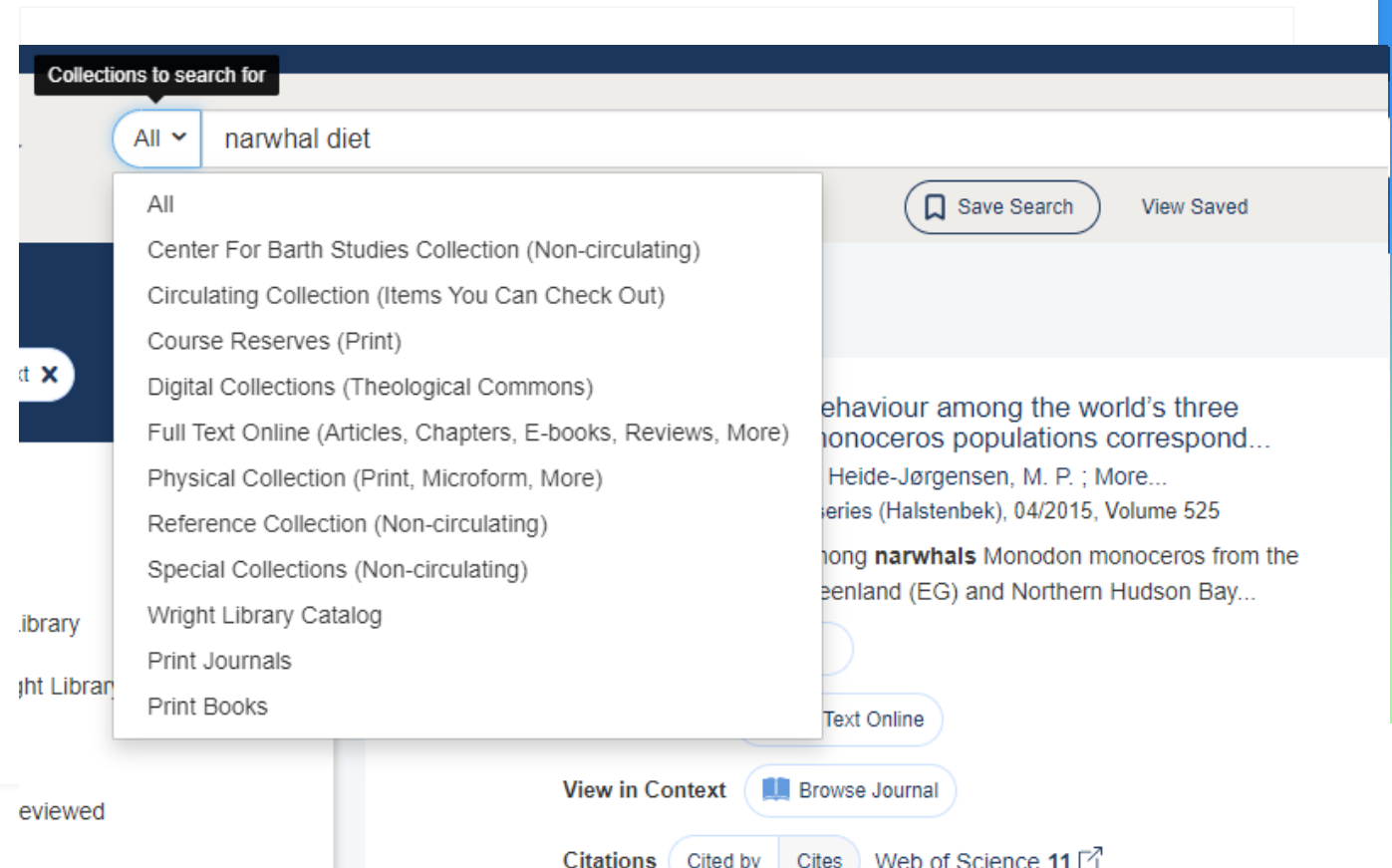
The screenshot shows the Summon search interface. At the top, there is a search bar with the text 'marmot' and a dropdown menu labeled 'Collections to search for'. The dropdown menu is open, showing a list of collection categories: All, Medical Journals, Special Library Section, Local Collections, School of Music, Targeted Legal Collections, and Dissertations and Theses. Below the search bar, there are several checkboxes for refining the search, including 'Add results beyond your library's collection', 'Peer-Review', 'Open Access', 'Physical Books in Library Catalog', 'Full Text Online', 'Library Catalog', and 'Include matches in Full Text' (which is checked). The search results are displayed below, showing a list of items. The first result is a book titled 'Marmots' by Arnold, Walter, published in Current biology, 08/2019, Volume 29, Issue 16. The second result is a journal article titled 'Marmots' by Arnold, Walter, published in Current biology, 08/2019, Volume 29, Issue 16. The interface also includes a 'Quick Look' button and a 'View Saved' link.

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



The screenshot shows a search interface with a search bar containing the text "narwhal diet". Below the search bar is a dropdown menu titled "Collections to search for" with a current selection of "All". The dropdown menu lists the following options:

- All
- Center For Barth Studies Collection (Non-circulating)
- Circulating Collection (Items You Can Check Out)
- Course Reserves (Print)
- Digital Collections (Theological Commons)
- Full Text Online (Articles, Chapters, E-books, Reviews, More)
- Physical Collection (Print, Microform, More)
- Reference Collection (Non-circulating)
- Special Collections (Non-circulating)
- Wright Library Catalog
- Print Journals
- Print Books

Other visible elements in the interface include a "Save Search" button, a "View Saved" link, a "View in Context" button, a "Browse Journal" button, and a "Citations" section with options for "Cited by", "Cites", and "Web of Science 11".

Scopes for Summon Searches

How to Configure Search Scopes for Summon



2023 Q3

- 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

The screenshot displays the Summon™ Editor Admin Console interface. The top navigation bar includes 'Summon™ Editor PREVIEW' and several menu items: 'SETTINGS', 'MAPPING', 'PAGES', 'USAGE', 'TRANSLATIONS', 'RECOMMENDER', and 'CONTENT IN'. The 'Settings' section is active, with a sidebar menu listing various configuration categories. The 'Search Scopes' category is selected and highlighted. The main content area shows the 'Search Scopes' configuration page, which is divided into 'Enabled' and 'Disabled' sections. The 'Enabled' section lists several search scopes with 'Edit' and 'Delete' buttons: 'All', 'Ford + library', 'Architecture', 'issn', 'issn open access physics disciplin', and 'subj humans author wang wei database medline'. An 'Add new search scope' button is located at the bottom of the 'Enabled' section. At the bottom right of the page, there are 'Save Settings' and 'Reset Form' buttons.

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

Participant Record Prioritization

Citation Formats

Advanced Search

Refine Your Search

Search Scopes

Custom Link

Topics

Resource Link Prioritization

A&I Detail Page

Transliteration (880 Fields)

Configuration (read only)

Chat

Summon 2.0 Configuration

Summon 2.0 Customization

Summon 2.0 External Script

Altmetrics

Web of Science - Free View

bX Recommender - Related Articles

Custom Sections

SAML

Name

Description

Scope Query

Save Cancel

Search Options Clear all X

What are you searching for?

ISSN

Publication date

m/d/yyyy → 7/17/2023 Clear

Refine your search

Add results beyond your library's collection

Full Text Online

Include matches in Full Text

Library Catalog

Open Access

Peer-Review

Content Type Sort

Content Type Filter

Any Type

Architectural Drawing

Archival Material

Discipline Sort

Discipline Filter

No results found

Improve the Quick Look Pane Layout

A more flexible 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



2023 Q3

Quick Look 1 of 1.9K results

Fatty acids and stable isotopes ($\delta^{13}\text{C}$ and $\delta^{15}\text{N}$) reveal temporal changes in narwhal (*Monodon monoceros*) diet...

by Watt, Cortney A.; Ferguson, Steven H.

Journal Article Direct link to PDF

Full Text Online More Options

Citations Web of Science 32

Abstract

Narwhals (*Monodon monoceros*) are sentinel species in the Arctic and to investigate marine food web changes from 1982-2011 we examined diet using fatty acids, $[\delta^{15}\text{N}]$, and $[\delta^{13}\text{C}]$, in narwhals from Baffin Bay (BB) and northern Hudson Bay (NHB). We predicted temporal changes would be greater in NHB due to a significant reduction in summer ice cover. In NHB, $[\delta^{15}\text{N}]$ significantly increased, $[\delta^{13}\text{C}]$ displayed a parabolic trend, and fatty acids gradually shifted, albeit not significantly, over time. $[\delta^{15}\text{N}]$ was stable, $[\delta^{13}\text{C}]$ decreased, and fatty acids significantly changed over time in BB. Stable isotope mixing models indicated a dietary reduction in capelin and increase in Greenland halibut from 1994-2000 to 2006-2011 in BB, while capelin was an important dietary component for narwhals in NHB in recent years (2006-2011). These dietary changes may be attributed to changes in sea ice and narwhal migration. Seasonal dietary changes, as evidenced by changes in blubber fatty acids and skin and muscle stable isotopes, were not as apparent in the NHB population, which may be indicative of a reduced migratory distance. Long-term monitoring of narwhal diet and migratory patterns associated with reduced sea ice provides invaluable information about how the marine ecosystem will redistribute with global warming.

Aquatic Science & Fisheries Abstracts (ASFA) Professional

1

Subjects

Record Details

Publication Title
Marine mammal science

Volume
31

Issue

NERS



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

The screenshot shows the Summon™ Editor Admin Console. The top navigation bar includes 'SETTINGS', 'MAPPING', 'PAGES', 'USAGE', 'TRANSLATIONS', 'RECOMMENDER', and 'CONTENT INGESTION'. The 'Settings' page is active, with a sidebar menu on the left containing 'General', 'Search Results', 'Quick Look', 'Logos', 'Subject Terms', 'Authentication', 'Facets', 'Reworks', and 'Syndetics'. The 'Quick Look' settings panel is expanded, showing a 'CUSTOM' tab and a 'Quick Look Items' section. Under 'Expanded', 'Record Details' and 'Syndetics' are listed. Under 'Collapsed', 'Subjects' is listed. 'Save Settings' and 'Reset Form' buttons are at the bottom right.

NERS

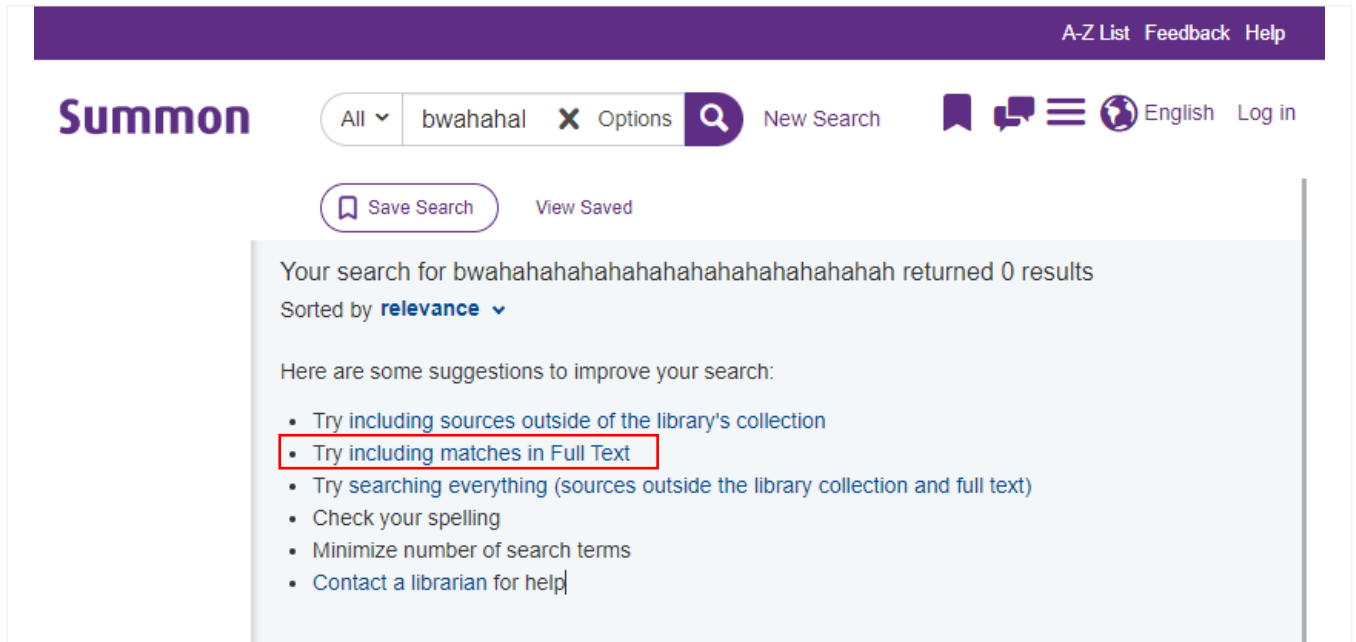


“Include Matches in Full Text” to Search Suggestions

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



Summon All ▾ bwahahal ✕ Options 🔍 New Search A-Z List Feedback Help

Save Search View Saved

Your search for bwahahahahahahahahahahahahahahah returned 0 results
Sorted by **relevance** ▾

Here are some suggestions to improve your search:

- Try including sources outside of the library's collection
- **Try including matches in Full Text**
- Try searching everything (sources outside the library collection and full text)
- Check your spelling
- Minimize number of search terms
- Contact a librarian for help

NERS



“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



2023 Q3

A screenshot of a search interface showing a purple header with a checkmark and the word "Selected" next to a "Clear all" button. Below the header is a search filter "humans" with an "x" icon. The main area is titled "Refine your search" and contains a list of checkboxes: "Add results beyond your library's collection", "Peer-Review", "Open Access", "Physical Books in Library Catalog", "Full Text Online", "Library Catalog", and "Include matches in Full Text". An orange arrow points to the "Include matches in Full Text" option.

NERs



“Include Matches in Full Text” to Search Suggestions

How to Configure



2023 Q3

- 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

Refine Your Search

CUSTOM Refine Search Selection

Enabled	Disabled
Add Results Beyond Catalog	Limit To Scholarly
Limit To Peer Reviewed	Items At My Institution
Open Access	eBooks Filter
Physical Books Filter	
Full Text Online	
Include Matches Full Text Override	
Items In Catalog	

CUSTOM

Include Matches Full Text Default	ON	On <input checked="" type="radio"/> Off <input type="radio"/>
Physical Books - Backend Processing	ON	On <input checked="" type="radio"/> Off <input type="radio"/>

Save Settings Reset Form

NERS



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

Off-campus: when opening a database, e-book, or other resource, you'll be prompted to log into the library's proxy server. Use your regular campus login to gain access.


Need help?
Contact the library staff by email: staff@demolibr.com.
Call the library at (260) 555-1212.

From Wikipedia, the free encyclopedia
Biology

Biology is the scientific study of life. It is a natural science with a broad scope but has several unifying themes that tie it together as a single, coherent field. For instance, all organisms are made up of cells that process hereditary information encoded in genes, which can be transmitted to future generations. Another major theme is evolution, which explains the unity and diversity of life. Energy processing is also important to life as it allows organisms to move, grow, and reproduce. Finally, all organisms are able to regulate their own internal environments.

[Read more](#)

Suggested Librarian

 Morgan Pruitt
[Send Email](#)
910-814-8814

Related Topics

- Biophysics
- Molecular biology
- Synthetic biology

Database finder

nature x 

Showing 1-10 of 1 database results:

[American Museum Of Natural History](#)

The American Museum of **Natural History** database contains images from 7 collections from the museum including the *Rare Book Collection*, *Julian Dimock Collection*, *Lumholtz Expedition to Mexico*, *Art & Memorabilia*, *Jesup North Pacific Expedition*, *Photographic Collection*, and the *Lantern Slides* collections. The database also contains three exhibits, *Natural Histories*, *Picturing the Museum*, and the *Nature, Knowledge and the Knower* exhibit.

Description: The American Museum of Natural History database contains images from 7 collections from the museum including the *Rare Book Collection*, *Julian Dimock Collection*, *Lumholtz Expedition to Mexico*, *Art & Memorabilia*, *Jesup North Pacific Expedition*, *Photographic Collection*, and the *Lantern Slides* collections. The database also contains three exhibits, *Natural Histories*, *Picturing the Museum*, and the *Nature, Knowledge and the Knower* exhibit.

Time Period: 19th and 20th centuries
Sources: Contains more 7,600 images.
Subject Headings: History, Science
Scholarly or Popular: Semi-scholarly
Primary Materials: Images
Information Included: Full Text
FindIt@BALL STATE: No
Print Equivalent: None
Publisher: American Museum of Natural History
Updates: NA
Number of Simultaneous Users: Unlimited

NERs



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

Custom Sections

<input type="checkbox"/> DEFAULT	Show 'More' enabled	ON	?
<input type="checkbox"/> DEFAULT	Default sections displayed	3	?
<input type="checkbox"/> DEFAULT	Display Order	Enabled Disabled	?
		Springshare A-Z Database Finder	
		Custom Panel Section	
		Topic Explorer	

Save Settings Reset Form

NERS



Ability to Customize of Elements in the Right Pane

How to Configure Database Finder



2023 Q3

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

A-Z Database settings

The A-Z Database service requires an active subscription. To be able to show the widget, Springshare API details are needed. See [Springshare help page](#) for more details.

After providing the API details, it might take up to two days before the databases are searchable from the Summon database search widget. Use the testing tool at the bottom of this page to see if there are any results for your API key. When you find there are search results, you can enable the widget below.

Enable A-Z database search for every Summon query On Off

Set default number of results displayed

API URL

Client ID

Client secret key

AZ Widget Browse URL
Optional. If provided, the widget will display a line with the following text, including this URL: "Or 'click here' to browse by subject.". When left empty, this line will not show.

AZ Widget Proxy URL
Optional. If provided, database URLs that have 'enable_proxy' configured, will be prefixed by the contents of this field. Make sure it includes '?url=' (or equivalent for your proxy solution), so the proxied URL will look like 'https://myproxy.institution.com/?url=https://database.com/id/12345'.

Test credentials First verify the SpringShare credentials.

Save settings Save the provided credentials for future use.

NERIS

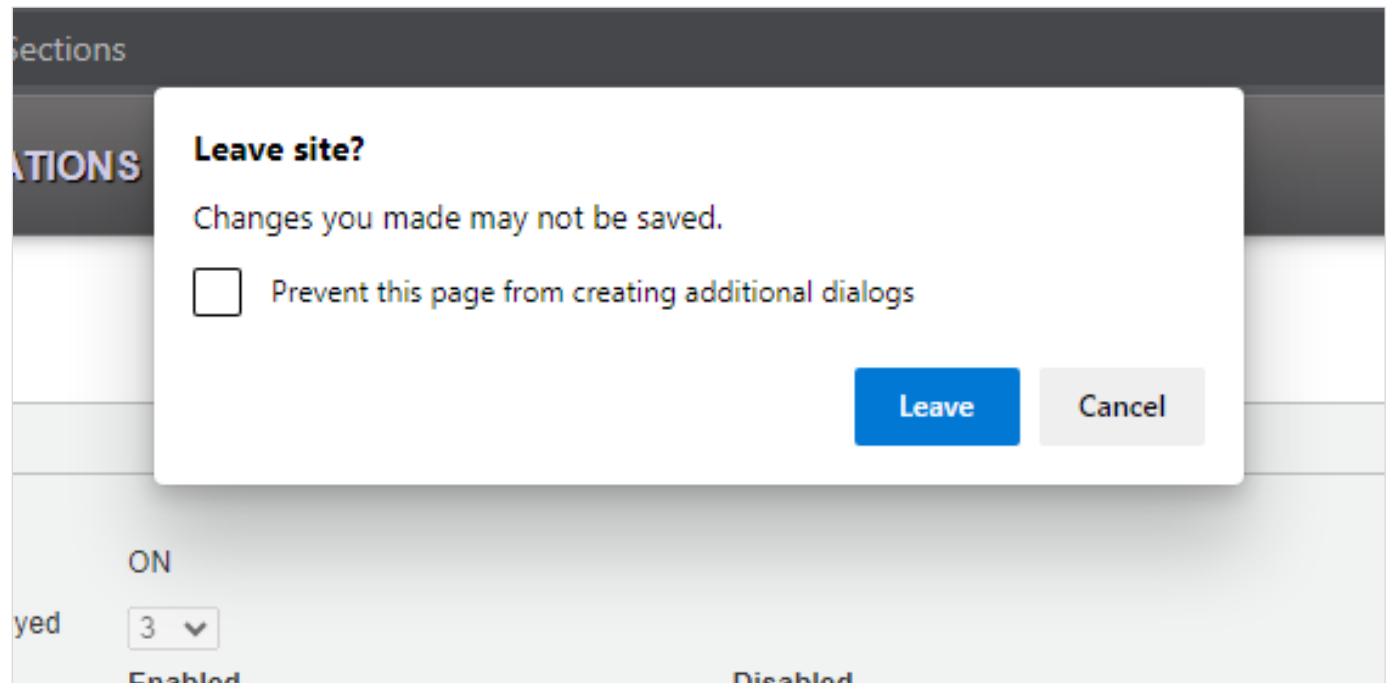


Warning to Save Changes

How to Configure Database Finder-k

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

 2023 Q3





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

Quick Look 1 Of 100 Results

Marine Mammal Science
Fatty acids and stable isotopes ($\delta^{13}\text{C}$ and $\delta^{15}\text{N}$) reveal temporal changes in narwhal (*Monodon monoceros*) diet.
by Watt, Courtney A.; Ferguson, Steven H.

Journal Article Direct link to PDF

Full Text Online More Options

Peer-Review
Open Access

Subjects
diet
Fatty acids
Food chains
long-term data
Marine
migration patterns
Monodon monoceros
stable isotopes
temporal trends

Record Details
Publication Title
Marine mammal science
Volume
31
Issue
1
Language
English
Publisher
Blackwell Publishing Ltd
Date
01/2015
Copyright
2014 Society for Marine Mammalogy

Abstract
Narwhals (*Monodon monoceros*) are sentinel species in the Arctic and to investigate marine food web changes from 1982-2011 we examined diet using fatty acids, delta 15N, and delta 13C, in narwhals from Baffin Bay (BB) and northern Hudson Bay (NHB). We predicted temporal changes would be greater in NHB due to a significant reduction in summer ice cover. In NHB, delta 15N significantly increased, delta 13C displayed a parabolic trend, and fatty acids gradually shifted, albeit not significantly, over time. delta 15N was stable, delta 13C decreased, and fatty acids significantly changed over time in BB. Stable isotope mixing models indicated a dietary reduction in capelin and increase in Greenland halibut from 1994-2000 to 2006-2011 in BB, while capelin was an important dietary component for narwhals in NHB in recent years (2006-2011). These dietary changes may be attributed to changes in sea ice and narwhal migration. Seasonal dietary changes, as evidenced by changes in blubber fatty acids and skin and muscle stable isotopes, were not as apparent in the NHB population, which may be indicative of a reduced migratory distance. Long-term monitoring of narwhal diet and migratory patterns associated with reduced sea ice provides invaluable information about how the marine ecosystem will redistribute with global warming.

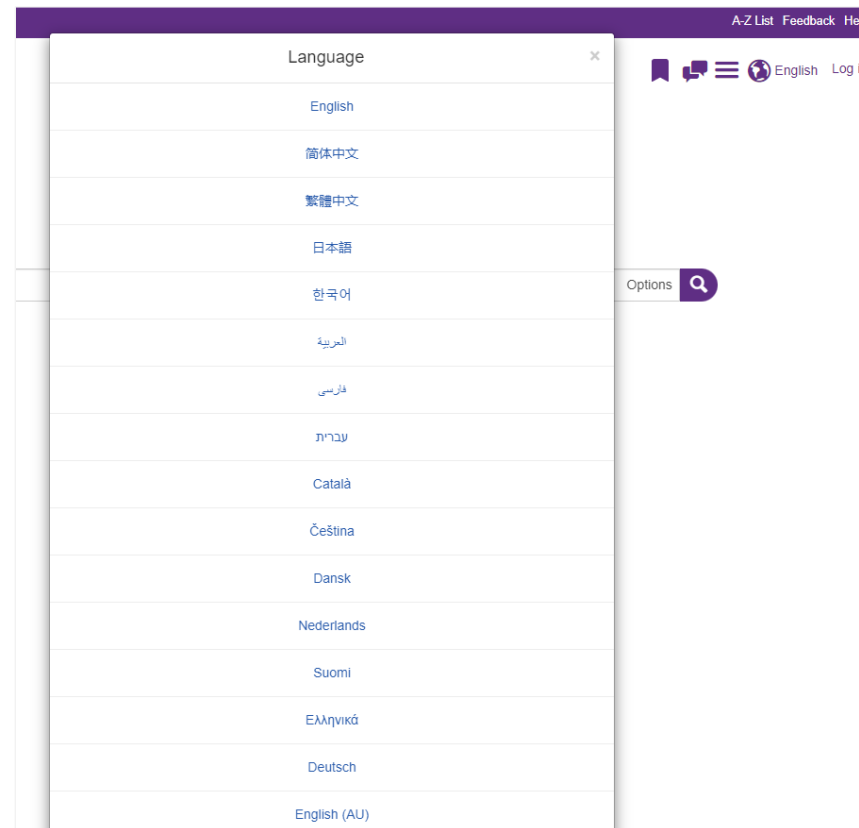
Aquatic Science & Fisheries Abstracts (ASFA) Professional

WEB OF SCIENCE 28 1

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



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



NERS



Ongoing Improvements

Other



Accessibility



Analytics



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 ORCID IDs (possibly other IDs) and normalize the author name
- Separate keywords and (normalized) subjects



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



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%**

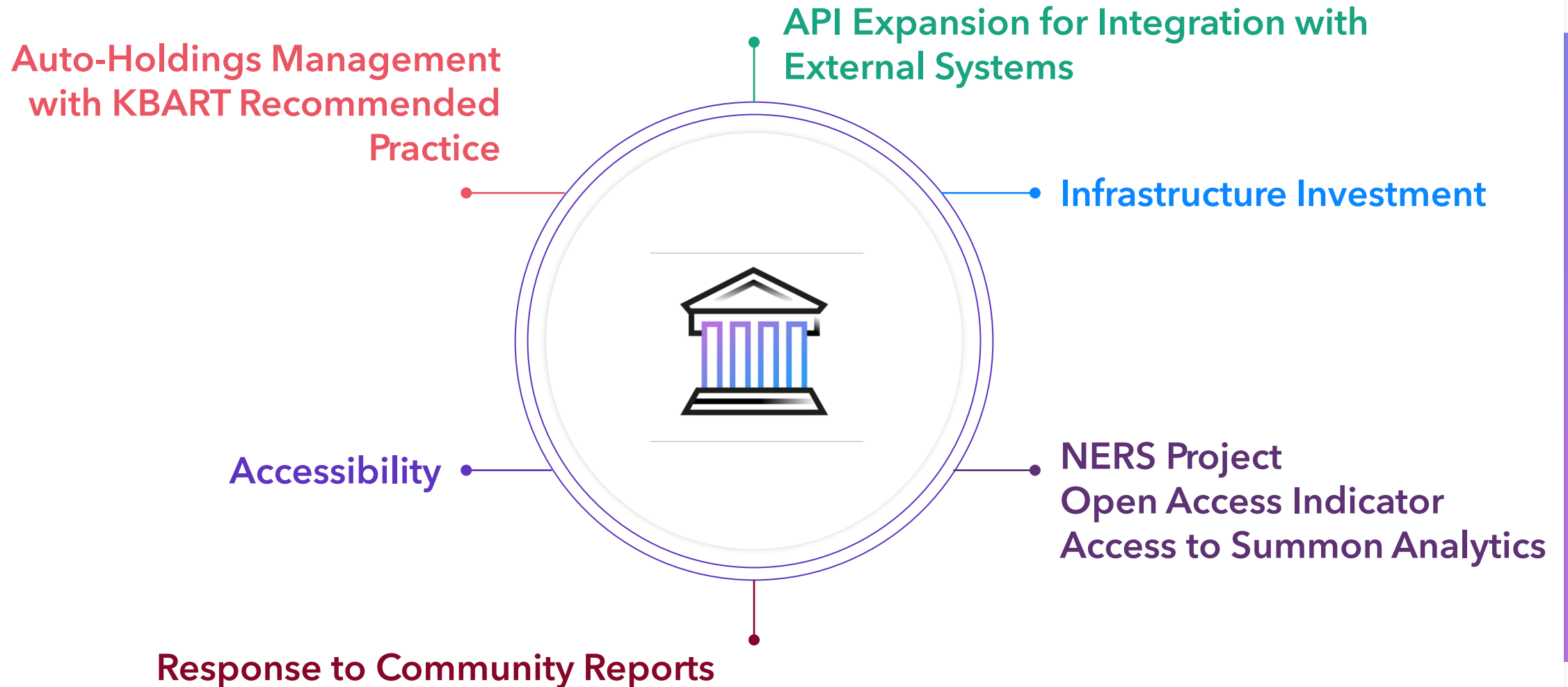
Provider +	Content +	Type of Content (PDF/HTML) +
ACH Digital Library	All	PDF
Academic	All	HTML
ProQuest	All Content including eBooks on the ProQuest Platform: https://www.proquest.com	HTML (most cases) (to download the PDF full text is included with the article)
SAE Publications	Journals under https://www.sae.org	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
Stone	Journals Content under https://www.stone.org	PDF
IQD Publishing	All	PDF
National Library of Medicine	Content which is part of Public Domain collection under https://www.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
Crucial Informa	Content under https://search.proquest.com/	PDF, HTML
Thieme	All Journals content including conference proceedings under https://www.thieme.com	PDF, HTML
IEEE	Content under https://www.ieee.org	HTML
Mary Ann Liebert, Inc.	Journals under https://www.wiley.com/	PDF, HTML
SPR	Content under https://www.spr.com/	PDF, HTML
University of Chicago Press	Content under https://www.uchicago.edu/	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, Databases, Proceedings, Books under https://arc.aiaa.org/	Journals, Databases, Proceedings (PDF, HTML) Books (HTML)
Anderson Street	All	HTML
Taylor & Francis	All	PDF, HTML
Ergebnis Publishers	All	PDF
World Scientific Publishing	Journals	PDF
Cambridge University Press	Journals, Books	HTML
American Chemical Society	Journals, Books	PDF, HTML
ERIC (Full Text Higher Education Press)	Journals	HTML
American Society for Microbiology	Journals	PDF, HTML
WILEY	All	PDF, HTML
Edinburgh University Press	Journals under https://www.edupublishing.com/	PDF, HTML
Harvard	Books	HTML
O'Reilly Media, Inc.	Books	HTML
USPTO	Published applications and issued patents available under https://pubs.uspto.gov/du-wo-app/abstract/patent/patent.aspx?seqNo=1	PDF

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



360 and Intota: the Idea Exchange Edition

2023 Roadmap Highlights



Quarterly Release Dates



February 1




May 3

August 2

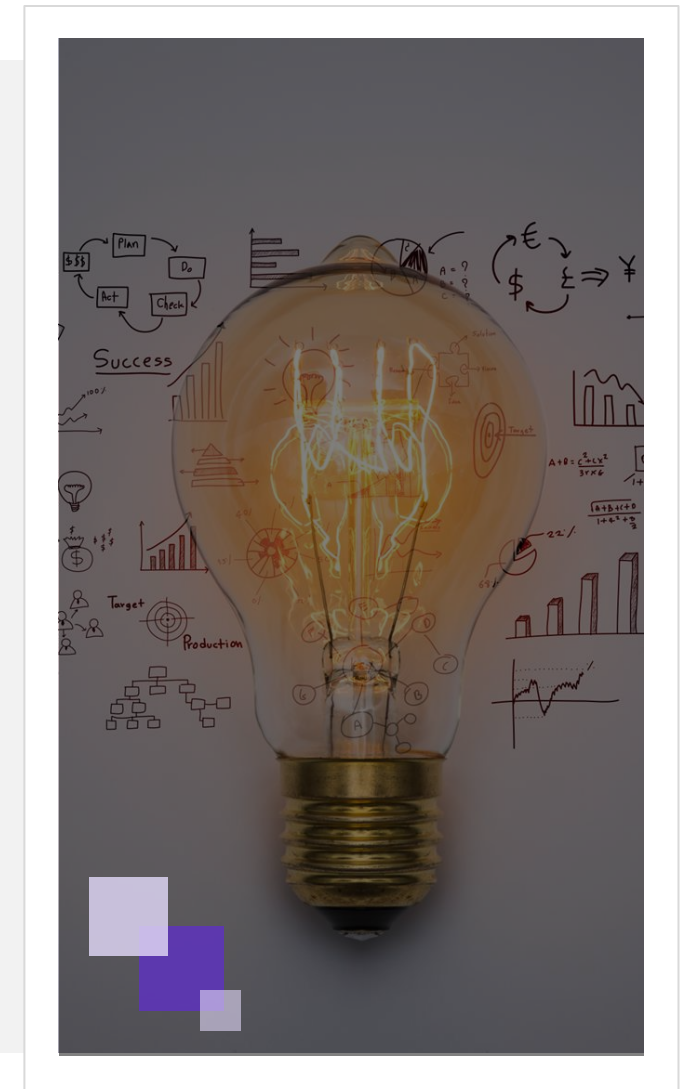
November 1



- Auto-Holdings Management with Taylor & Francis is live!

-  Open Access indicators for databases and titles

- Add non-admin permission and link to Summon Analytics in 360 Client Center and Intota



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



360 Configuration: Database Details

Display

Public All Titles Note

Display

Auto Holdings Settings

CRN

Intota Configuration: Database Details

About

** Required Field*

Cancel Save

Database Name *

Provider Name [Taylor & Francis](#)

Status

OA Coverage 0 %

MARC Coverage 85 %

Title Coverage ONLY SELECTED titles ALL titles

Database Description

Long Database Description

Automate Holdings Automatic Manual

CRN




- **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**


Open Access Integration in Intota

Agricultural Science Database

 Subscribed - ProQuest - MOK

OA Coverage 19 %

MARC Coverage 92 %

 **Database**
1009 titles

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

Open Access Integration in Intota



Agricultural Science Database (MOK)

<https://search.proquest.com/agriculturejournals>

ProQuest

1009 titles (7 books, 1002 journals, 0 videos)

✓ Resource Type Database ✓ Status Subscribed ✓ Discoverable 360 Link, 360 Core, 360 MARC Updates, Summon

Last Full Update 04/19/2023

Last Partial Update 07/31/2020

Titles (1009 tracked of 1009)

About

Database Name Agricultural Science Database

Provider Name ProQuest

Status Subscribed

OA Coverage 19 %

MARC Coverage 92 %

Title Coverage ALL titles

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 Xylogologiae 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

Open Access Integration in Intota



Acta Agronómica

Alt. Title: Acta agronomica

Found in: [Agricultural Science Database](#) by [ProQuest](#)

Date(s): 01/01/2004 to present

<https://search.proquest.com/publication/2035751>

✓ Resource Type **Ejournal** ✓ Holding Status **Subscribed** ✓ Discoverable **360 Link, 360 Core, 360 MARC Updates, Summon**

Holding Details

Database Name [Agricultural Science Database](#)

Provider Name [ProQuest](#)

Status **Subscribed**

OA Yes

Coverage Dates from 01/01/2004 to Present

Non-Admin Link to Summon Analytics

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

The image shows a screenshot of the 360 interface. On the left, a navigation menu is visible with the following items: Account Details, General, Permissions, 360 Core Permissions (highlighted with a red box), 360 Resource Manager Permissions, and Email Notices. On the right, a list of permissions is displayed, including: Statistics Tools View, 360 Link Customization View/Edit, Data Management View/Edit, Data On Demand View/Edit, Date Format View/Edit, E-Journal Portal Customization View/Edit, Summon Customization None (highlighted with a red box), Summon Usage Statistics View/Edit (highlighted with a red box), Library Accounts View/Edit, Library Information View/Edit, Local Holdings Management View/Edit, 360 Search Customization View/Edit, Knowledgebase Notifications View/Edit, and Display Full Details In View Changes View/Edit.

Non-Admin Link to Summon Analytics

Business Intelligence Tools

[360 Usage Statistics](#)

[Overlap Analysis](#)

[Data On Demand](#)

[Management Reports](#)

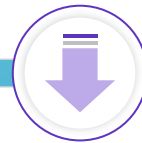
[Intota Assessment](#)

[COUNTER Configuration](#)

[Ulrichsweb Usage Statistics - New Platform](#)

[Ulrichsweb Usage Statistics](#)

[Summon Usage Statistics](#)



The screenshot shows the Oracle Analytics web interface. At the top is a blue navigation bar with the Oracle Analytics logo and a menu containing 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. Below the navigation bar, the interface is divided into two main sections. On the left, under the heading 'Create...', there are three options: 'Analysis and Interactive Reporting' (with a clock icon), 'Published Reporting' (with a document icon), and 'Actionable Intelligence' (with a person icon). Below this is a 'Jobs' section with links for 'Report Jobs' and 'Report Job History'. On the right, under the heading 'Recent', there is a message: 'Recently opened or edited items will be displayed here.' and a link for 'Download Desktop Tools'.



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



Community Engagement

Community Engagement

- Planning for 2024 Roadmap already underway

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





Questions?



Thank You!

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About Clarivate

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