



"Summoned" to Summon – What's the latest?!

Brent Cook and Susan Johns-Smith

Tuesday, March 23 – Thursday, March 25

"Summoned" to Summon - What's the latest?!

- Our program today will provide updates for the latest product development with Sierra / Summon
- Joining us today is Brent Cook, Director, Product Management, Summon
- Brent will begin our session with an overview of product work to date and lay out our anticipated roadmap for features over the next 3-4 months

"Summoned" to Summon - What's the latest?!

- Please hold your questions until after the presentation, which should run about 30 minutes.
- Brent and I will join you live for your questions, concerns, and other observations at the end of his presentation.

**And now, please join me in
welcoming Brent Cook to IUG**

Agenda

- Ex Libris and Summon overview
- Review Sierra via Summon integration plan
- Current functionality demo
- Q&A

**LIBRARY
MANAGEMENT**

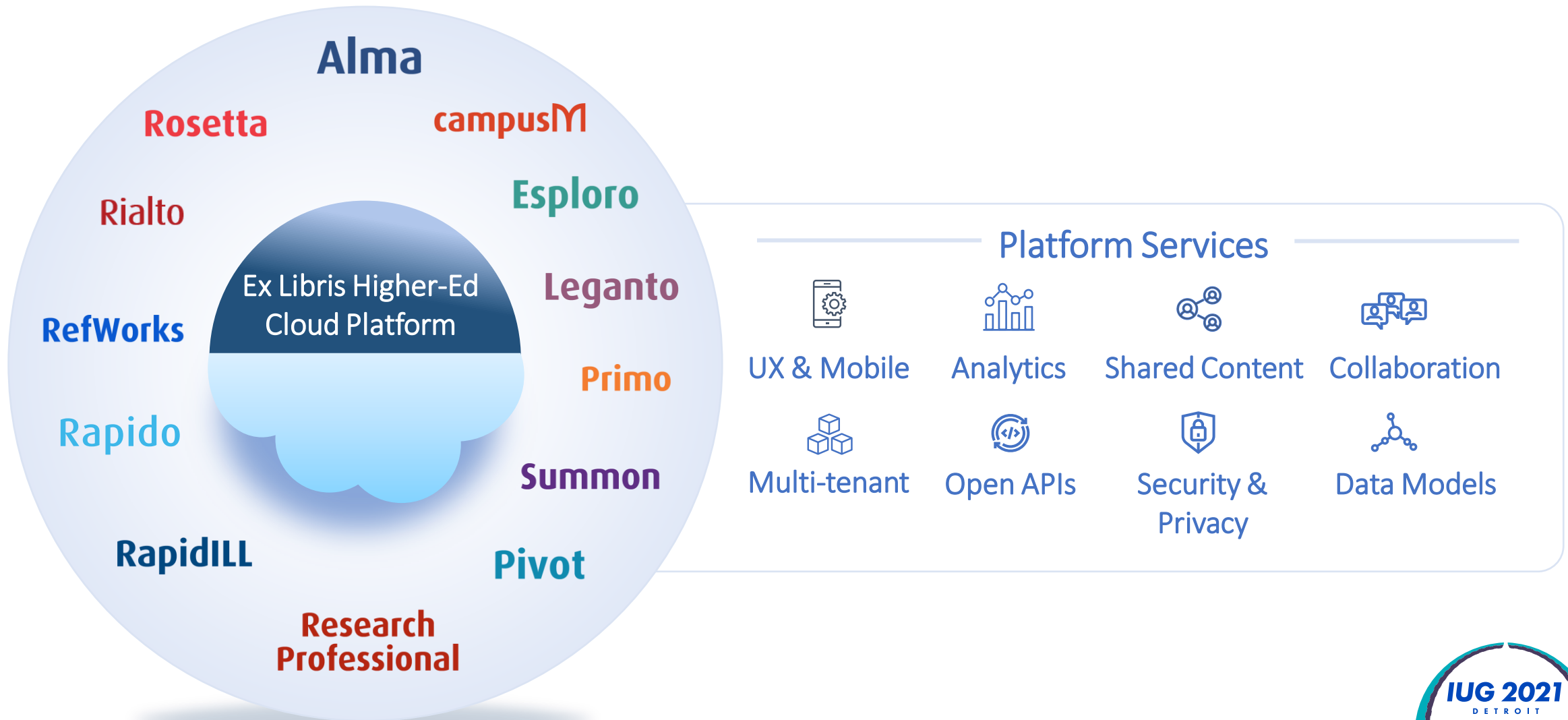
**RESEARCH &
DISCOVERY**

**STUDENTS &
LEARNING**



**Ex Libris Higher-Ed
Cloud Platform**

Accelerating Innovation: Ex Libris Higher-Ed Cloud Platform



Accelerating Innovation: Ex Libris Higher-Ed Cloud Platform



Discovery

**Allow end users to
discover collections and
resources**

**ExLibris
Summon**



Discovery is a single search box and more

What are you looking for?

Search all Library Collections

Limit results to:

- Journal Articles
- Theses and Dissertations
- Books
- Audio
- Video
- Reference

[Advanced Search](#)

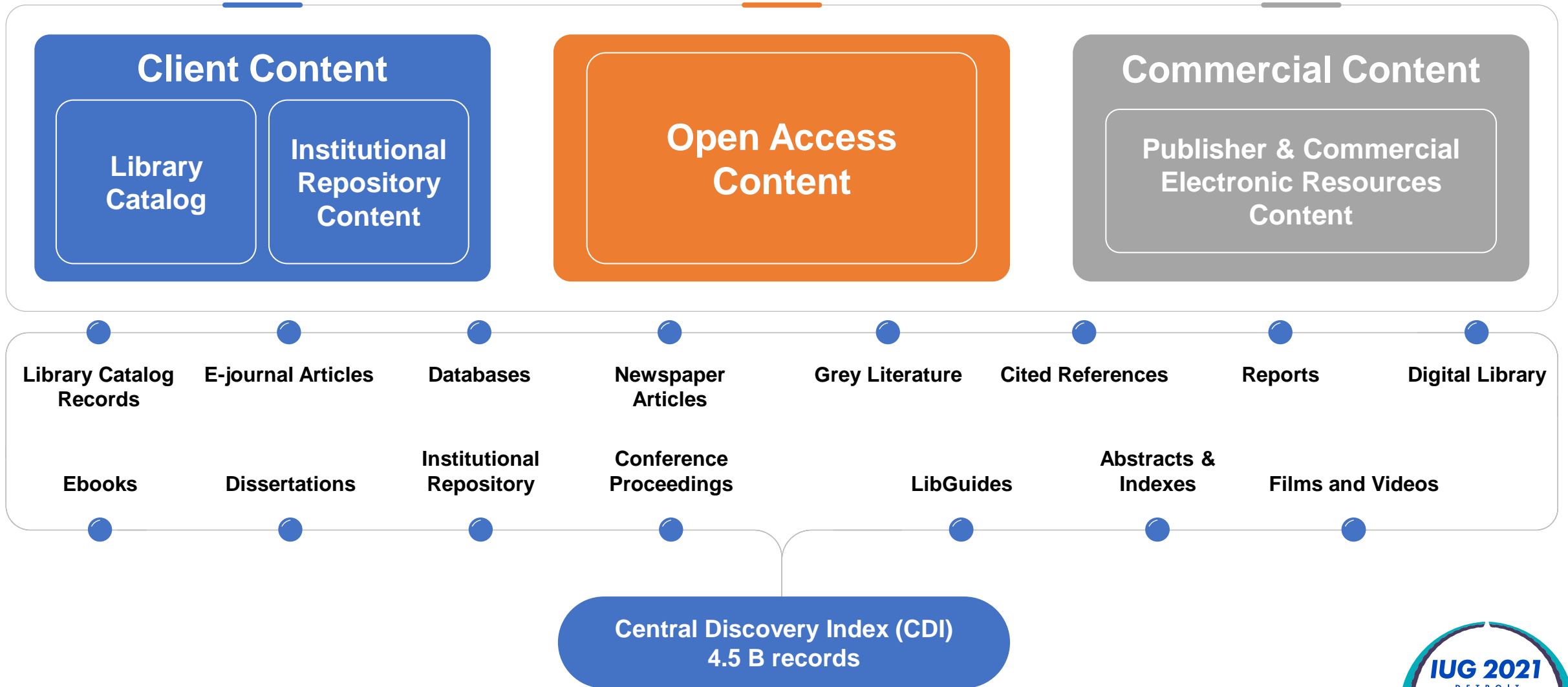
Search

[Everything](#) [Journal Articles](#) [E-Books](#) [Guides](#)

[Advanced Search](#)



Providing access to everything, now, and in one spot



Providing access to everything, now, and in one spot

**CDI enables Summon to
provide libraries with the most
comprehensive search
available.**

Central Discovery Index
(CDI)
4.5 B records


ExLibris
Summon



#IUG2021



Resolving user content discovery challenges

 Streamlining access to all resource types and formats, regardless of provider

 Enhancing exploration to improve information literacy

 Making library services available in an online environment



**Review of
Sierra via Summon
Integration**

Introducing the Sierra via Summon Integration

- Delivering More Value
 - More for Libraries
 - More for Patrons
- Integration Overview
- Three Development Phases



Delivering More Value for Libraries



- Reduce librarian workload
- Increase user satisfaction
- Enhance discovery of local holdings

Improved management & discovery of resources

End-to-end resource delivery & fulfilment

Integrated and advanced patron services



Delivering More Value for Patrons

- Display local holdings and item availability
- Integrate user accounts
- Support patron login-in
- Allow actions: renew, cancel, edit, requests (BIB/item level), etc.
- Display holdings and items from other institutions

Improved management & discovery of resources

End-to-end resource delivery & fulfilment

Integrated and advanced patron services

Integration Overview



- Support single Sierra-Summon institution
- 3-phased rollout
- Group of early access customers

Improved management & discovery of resources

End-to-end resource delivery & fulfilment

Integrated and advanced patron services



Three Development Phases

Phase 1
Availability and items
Request in BIB and Volume level
Login – Sierra CAS, Patroninfo
Q1 2021

Phase 2
Library account – Main functionality and actions: Request, Loans, Fines, Messages and Personal details
H2 2021

Phase 3 - TBD
Library account – additional actions
Login – Support SAML
TBD

Early Access Program




- The Early Access Program is currently underway
- Institutions will:
 - Review of functionality in a demo environment
 - Provide feedback via common collaboration tools (such as email, Basecamp, and online meetings)
- Institution profile:
 - You need to be using the Sierra REST API version 6.0 or higher, which is supported on Sierra 5.1 and higher.
 - CAS must be installed. (SAML will be supported at a later date.)
- Provide an access to the new functionality in phases
- Test on preview environment



Project Timeline




Availability and Request – Solution Concept

1  **Marmots: social behavior and ecology**
by [Barash, David P](#)

1989
Book Paperback

[Summary](#)
[Preview](#)

 **Marmots: social behavior and ecology**
by [Barash, David P](#)

1989
Book Paperback: ● Available

Location

- Build Environments Library
- Health Science Library
- Engineering Library

[Request](#)

[Summary](#) | [Professional Reference](#)

[Preview](#)

Request Book

✓ **Request Complete**
Remember to log out on a public computer

Requested
Marmots: social behavior and ecology

Pickup location
Meridian Library

[OK](#)

Library Account – Solution Concept

My Library Card

alinslavik@libraryname.org
Fremont Home library

- Checked out 3
- Fines & Fees \$10.30
- Requests 2
- Reading History 5
- Messages 5
- Personal Details

Checked Out 3		Renew ¹	Sort by	Due date	▼
<input type="checkbox"/> Select all 3	Title	Due by	Days left		
<input type="checkbox"/>	Beneath the surface: killer whales, SeaWorld, and the truth beyond Blackfish by Hargrove, John (Animal trainer); Chua-Eoan, Howard	May 1, 2020	🕒 Overdue Fine \$ 2.50		<button>Renew</button>
<input checked="" type="checkbox"/>	Gone whaling: a search for orcas in northwest waters by Hand, Douglas, 1951	May 13, 2020	6 day left		<button>Renew</button>
<input type="checkbox"/>	Orca, the whale called killer by Hoyt, Erich	May 12, 2020	5 day left		<button>Renew</button>



Current Functionality

Presented by Wim Horinga, lead developer for Sierra via Summon

Maintain Your Summon Experience



■ User Experience

- User interface remains consistent
- Customizations maintained
- Patron re-education not required

■ Admin Workflows

- Use existing end user training materials
- Leverage the Summon Admin
- Easily manage the 360 KB

The image displays three screenshots of the Summon interface. The top-left screenshot shows a search results page for 'Diabetes Mellitus' with database recommendations and related topics. The top-right screenshot shows the 'Summon™ Editor' settings page, specifically the 'General' section, which includes fields for Page Title, Home Link, Feedback Email Address, Feedback Client Email Required, Feedback Link, Feedback Roles, About Link, Help Link, Enable Rss Icon, Saved Items Help Link, Autocomplete Enabled, Query Suggestions Enabled, DB Recommender Enabled, Related Records Enabled, Call Numbers Enabled (Availability), Dewey Numbers Enabled (Availability), Call Numbers Enabled (Preview), Dewey Numbers Enabled (Preview), and Display Call Numbers if. The bottom screenshot shows the 'Catalog Database Search Results' page, which is a table listing various database collections with columns for Database Name, Origin, Code, Status, Title, Provider, Collection, Max Connection, and Summon. The table includes entries such as '17th and 18th Century Bureau Collection', 'A&A', 'ABI Informs Global', 'ABI/INFORM', 'ABI/INFORM Archive (Legacy Platform)', 'ABI/INFORM Archive Complete (Legacy Platform)', 'ABI/INFORM Archive 1', 'ABI/INFORM Collection', 'ABI/INFORM Research (Legacy Platform)', 'Abstracts in Social Gerontology', 'Academic Abstracts FullText Site', 'Academic Search Elite', 'Academic Search Premier', 'Academic Source Premier', 'ACS Publications', 'ACS Journal Legacy Archive', 'Advances in Chemistry Series', 'ADSCOLA FullText (Legacy Platform)', and 'A&A FullTextMatch'.



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**Thank you, Brent, and allow us to
join you here momentarily for the
Q&A portion of our presentation**

**Please join me in thanking Brent
Cook for being part our
presentation today.**

**Further questions may be addressed to
Brent Cook,
Brent.cook@exlibrisgroup.com**

**or Susan Johns-Smith
sjohnssmith@pittstate.edu**

THANK YOU

**Stay Well,
Have a Great Day!**