
Summon: Release Notes

- **Product:** Summon
-

Where can I find the Summon service release notes?

Upcoming and recently released features are listed below, along with notices of major changes to the Summon service. To stay informed in the most timely way, however, you should consider [subscribing to the Summon listserv](#).

You might also be looking for:

- The [status](#) of the Summon Index in relation to content changes you are expecting to appear in Summon.
 - [System Status Page](#) providing updates on system availability, known performance issues and more.
 - The [Release Preview Environment](#) where you can view your Summon instance with the changes that will be included in the next release.
 - [Recordings of Summon Update sessions](#) presented by the product management team.
 - The [Ideas Exchange](#) page where you can post, vote, and comment on what you feel is important to further Summon development.
-

April 1, 2026

Summon New Feature

New Content Type “Game” is now supported as a Content Type in Summon libraries. This enhancement was delivered through the CERV process in response to community requests.

Games are an increasingly important medium for teaching and learning across higher education and teacher training. As collections grow, users benefit from the ability to easily discover games within library resources.

How to enable:

- Provide an updated mapping spreadsheet
- Submit a request for a catalog reload

Metadata guidance:

- The community recommends using **008 character position 33 = “g”** when the Leader type is **o, r, g, or k**
- This configuration can be customized to fit your institution’s metadata practices

Summon Resolved Issues

- Authentication via the **Authentication Banner** now correctly refreshes search results to include restricted content
- Added a **Content Security Policy header** to `/auth/redirect` for improved security
- Improved title linking behavior in search results:
 - Users are now directed straight to content (instead of the catalog record) when:
 - Content Type is **e-book, e-journal, journal, web resource, streaming audio, or streaming video**, and
 - Only a single 856 link is available
- Newly added **Custom Links** no longer encode spaces incorrectly
- Fixed an issue where deleting Saved Items could affect the wrong item under specific conditions

Summon Research Assistant Resolved Issues

- “Related research questions” no longer prompts users to sign in after returning from **View related results**
- Users who open Research Assistant from Summon and then sign in will now remain in Research Assistant (previously redirected back to Summon in certain cases)

March 4, 2026

Summon Resolved Issues

- Summon Topics feature shows empty articles for new clients
- Summon Custom Links instability
- Summon Usage link redirects to Oracle login prompt
- SAML login/logout loop occurs when accessing Summon search results from Research Assistant and using private site/splash page configuration

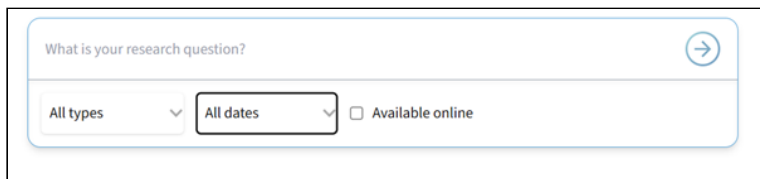
Summon Research Assistant Resolved Issues

- Accessibility improvements completed for screen reader usage
- “Related research questions” does not work after displaying “View Related Results”
- Incorrect alert shows when viewing “Related Results” from Summon RA
- RA View related result button not showing correctly

February 4, 2026

Summon Research Assistant Enhancement

- To make the search limits capability more obvious and useful to users, the interface has been updated:



The screenshot shows a search interface with a text input field containing the placeholder text "What is your research question?". To the right of the input field is a blue circular button with a white right-pointing arrow. Below the input field are two dropdown menus: the first is labeled "All types" and the second is labeled "All dates". To the right of these dropdowns is a checkbox labeled "Available online".

- Removed "beta" flag from the Research Assistant tab
- Resolved the SAML login/logout loop when accessing Summon search results from Research Assistant and using private site/splash page configuration

Near-Real-Time Record Corrections Enhancement

To address provider-supplied metadata errors that may break full text linking, Clarivate staff are now able to correct some display fields and push the correction out in a matter of minutes. This means that once the Support analyst updates the record, the fix is available long before the next Search Update cycle.

Notes:

The correction impacts display only. For a limited time, there may be a mismatch between searching and faceting and display. Once the next Search Update cycle is completed, searching, facets, and display will be in sync.

Eligible fields for near-real-time corrections:

- Title
- DOI
- Start Page
- Issue
- Volume
- End Page
- EISBN
- EISSN
- Publication Title
- URI
- Author (deletion only, no editing)
- Abstract (deletion only, no editing)

Accessibility Resolved Issues

- Summon search results cannot be scrolled through at 400% Zoom in Microsoft Edge browser
- Floating panel occupies the entire screen at 400% zoom and 320 pixel width
- Summon homepage large logo no longer automatically scales large images down

Summon Resolved Issues

- Summon Saved Searches disappeared in some cases
- Summon Saved Items disappeared - counts show but list is gone
- More Options link label is not correct and differs from the actual link (OpenURL link rule)
- Sierra: Reservation Error Failed
- Sierra: HTTP DELETE returns 404 and failing request
- Sierra: Library Card page shows no content

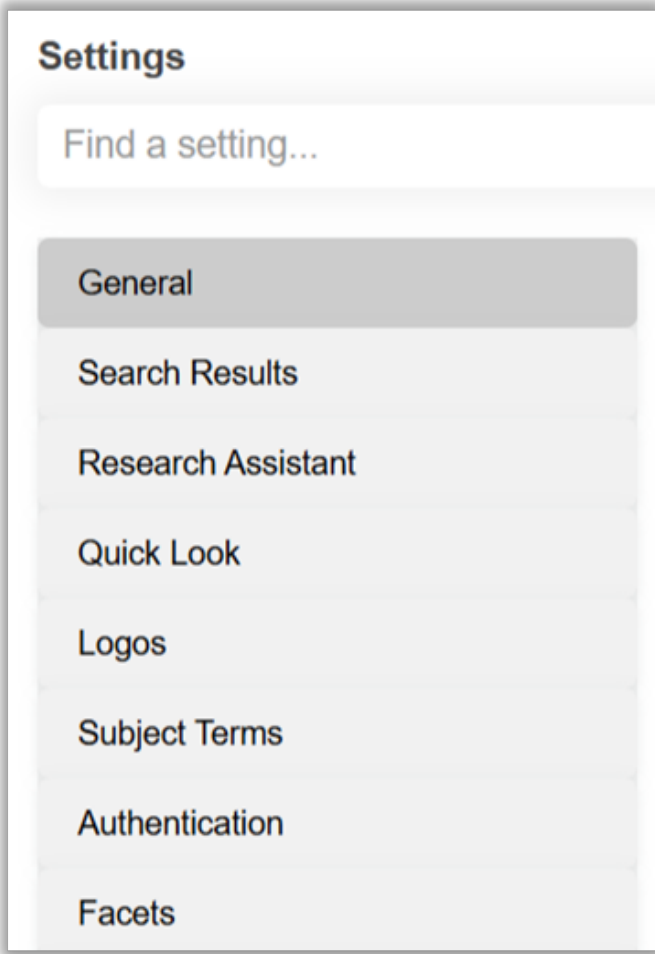
December 3, 2025

Summon Enhancements

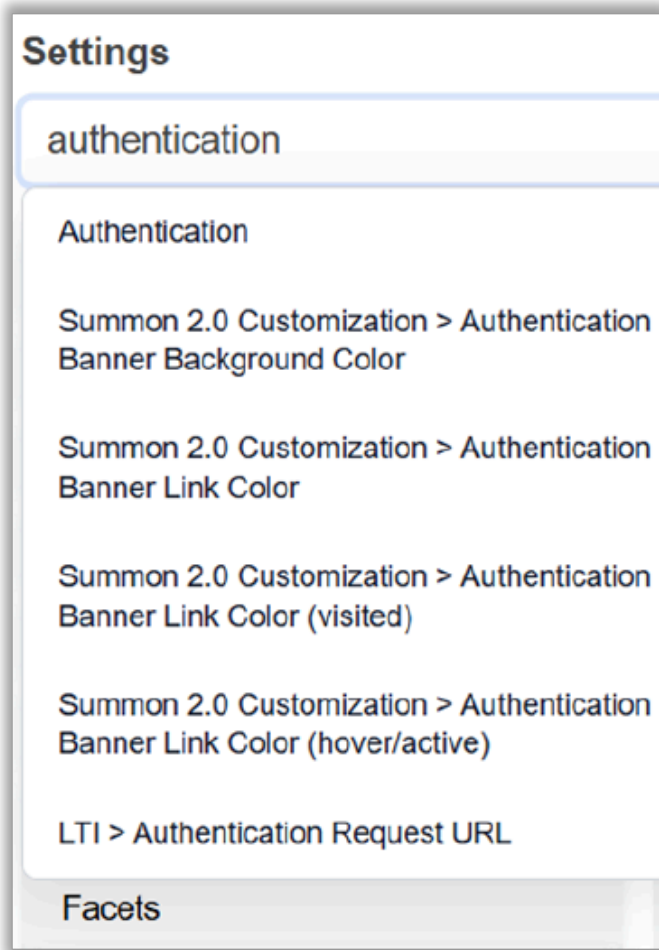
CERV Enhancement for Searching the Summon Administration Console

If you're sometimes confused where a particular setting "lives" in the Admin Console, you're not alone. Summon offers so many configuration options that it may be difficult to remember where to find a setting. With the December release there is now a **search option for the Settings page** that offers suggestions as you type:

New search box on Settings page



Search Suggestions for "authentication"



Note that the suggestions include sub-headings beneath from the Settings page (“Authentication”) as well as individual configuration options.

CERV Enhancement for Applying Multiple Content Types to a Catalog Record

There is a need to apply more than one content type to some records. From the Idea Exchange description: “... the same resource might be both a ‘catalog’ and a ‘book.’ Defining it as a ‘catalog’ should not mean it is excluded in a search limited to ‘books’.”

This can now be accomplished with the following caveats:

1. Relevant only to library catalog records
2. The library is opted out of the match and merge process
3. The library will need to submit a new mapping request via Customer Care

The content types will display in the brief results, facets, and Quicklook.

Summon Improvements and Resolved Issues:

- Display Secondary Content Type warnings in the brief results

- Add help text for all Administration Console options
- Allow libraries to retain the large logo on the home page
- Remove unnecessary labels from the A&I section if option doesn't exist
- Accessibility: allow facet pane to close at 400% zoom
- Accessibility: don't return empty child elements under h3 headings

Summon Research Assistant Improvements:

- Long label causes button overlap
- Icons displaying incorrect directionality for right-to-left languages

November 12, 2025

Summon Enhancements

- More than 200 libraries have enabled the new Summon homepage customization features! In response to your feedback, we made the following improvements:
 - Reduce the white space between homepage elements to reduce scrolling
 - Center the library's logo at the top of the page. This is how it worked previously, and many clients asked that we reinstate that alignment.
- The Ex Libris UX team designed an improved scheme for highlighting the Home, Library Search, and Summon Research Assistant tabs in the header. The goal was to make the tabs more obvious to users and to ensure accessibility.
- New Secondary Content Type: "Open Educational Resource" has been added to the CDI.
 - Will display in the filters list for Secondary Content Types
 - Will display in the brief result and Quick Look as a "regular" content type—not a warning
 - Translation is available in the Summon Administration Console

August 6, 2025

CERV Improvement for the Summon Home Page:

Summon libraries now have the ability to customize the Summon home page to promote services, events, announcements/alerts, and local people and teams, to suggest just a few ideas. The home page is now customizable using up to 5 new components, with mixing and matching possibilities to boost important information for your community. No coding or technical skills are required: all customizations are done in the Summon Administration Console.

Here is an example of the new components available to use:

Announcements and Events

Library of the Health Sciences Tour & Expo

August 26, 2025
11:00 AM - 2:00 PM

Join us on Tues., Aug. 26 from 11 a.m.-2 p.m. at the Library of the Health Sciences for our Library Tour and Expo! New and returning students are welcome to learn about library services by visiting different stations throughout the library. Our therapy dog, Pawfloor HAM, will also be in attendance!

New Study Rooms Available

Twenty (20) new group study rooms are now available on the 3rd floor of the Murray Library. Each room includes whiteboards, screens, and power outlets.

Reserve A Room

Research Assistance

Make an appointment with a librarian to discuss your research assignments and identify relevant resources. One option is to meet online, sharing a screen to walk through the search process together. To work in person with a librarian and a sign language interpreter, please request an interpreter when making an appointment. We look forward to working with you!

Accessibility Services

Ask a Librarian

Library Account

Search Tips

Opening Hours

New Digital Collections Available

We've recently expanded our digital collection! Explore over 2,000 newly added academic journals, eBooks, and databases in subjects like computer science, psychology, and business. Access anytime through your university login.

Alumni Services

Alumni who reside in state may be eligible for an Alumni Borrowing card, allowing them to continue to check out print materials from the Library.

Digital Scholarship Hub

The Digital Scholarship Hub is an interdisciplinary workspace that cultivates creativity, encourages collaboration, and enhances digital literacy skills through the use of software, technology, consultations, and innovation. A team is on hand to assist students and faculty on a range of technologies including 3D printing, prototyping development, Geographic Information System (GIS), data visualization, and text mining.

About the library

The University Libraries are home to thousands of academic journals, eBooks, and databases, plus expert research support from our librarians. We're here to help students and faculty succeed. Inside the library, you'll find a wide variety of study environments, from silent reading zones to interactive group spaces, as well as technology lending, printing services, and information literacy workshops. Our mission is to empower the university community with the tools, resources, and environment they need to thrive academically.

Library Locations

- Murray Library
- Library of the Health Sciences
- Crawford Undergraduate Library
- Jackson School of Law Library

- LibOutlets
- Bibliographic Institution
- Staff List

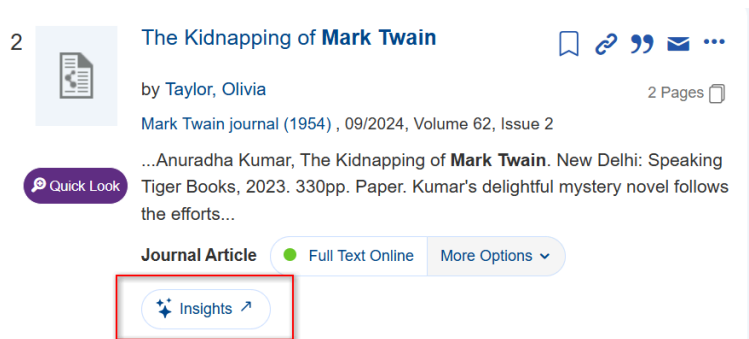
For full documentation please visit this [page](#) in the Knowledge Center.







CERV Improvement for the Summon Custom Links:


- Summon libraries need to define more than one custom link for the header and hamburger menu.
- The updated Custom Links section of the Settings page allows you to create up to ten custom links for display in the header and/or hamburger menu.
- The Custom Links, like the content on the new home page options, can navigate to any services, tools, suggestions, etc. that you think will aid researchers.
- See details on this [page](#).

NEW! AI Doc Insights Navigation

Researchers can now navigate from a Summon brief result to a provider platform's AI-enhanced tools or capabilities to gain key information at a glance and take advantage of further exploration paths. When this feature is enabled, an **Insights** button appears in the brief display for eligible collections. Selecting the button opens a new window/tab displaying the Document Insights for the resource on provider platform.





2  **The Kidnapping of Mark Twain**     

by Taylor, Olivia 2 Pages 

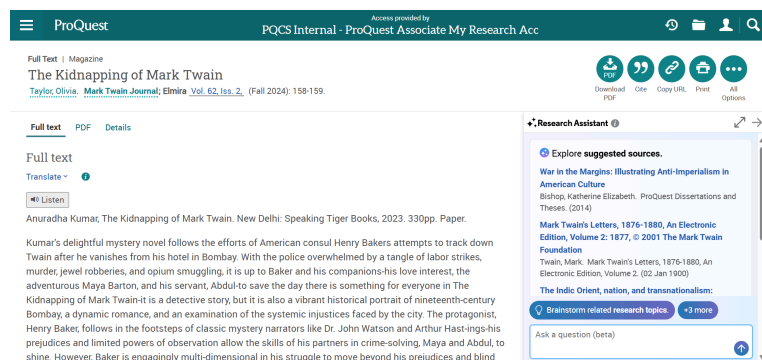
Mark Twain journal (1954) , 09/2024, Volume 62, Issue 2

...Anuradha Kumar, The Kidnapping of **Mark Twain**. New Delhi: Speaking Tiger Books, 2023. 330pp. Paper. Kumar's delightful mystery novel follows the efforts...

Journal Article ● Full Text Online More Options ▾

 Insights 

Clicking the Insights button from the brief result links to the page below with additional tools displayed on the right.



ProQuest PQCS Internal - ProQuest Associate My Research Acc


Full Text | Magazine


The Kidnapping of Mark Twain
Taylor, Olivia. *Mark Twain Journal*; Elmira. Vol. 62, Iss. 2. (Fall 2024): 158-159.

Download PDF Cite Copy URL Print All Options

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Full text

Translate 

 Listen

Anuradha Kumar, The Kidnapping of Mark Twain. New Delhi: Speaking Tiger Books, 2023. 330pp. Paper.

Kumar's delightful mystery novel follows the efforts of American consul Henry Bakers attempts to track down Twain after he vanishes from his hotel in Bombay. With the police overwhelmed by a tangle of labor strikes, murder, jewel robberies, and opium smuggling, it is up to Baker and his companions-his love interest, the adventurous Maya Barton, and his servant, Abdul-to save the day there is something for everyone in The Kidnapping of Mark Twain-it is a detective story, but it is also a vibrant historical portrait of nineteenth-century Bombay, a dynamic romance, and an examination of the systemic injustices faced by the city. The protagonist, Henry Baker, follows in the footsteps of classic mystery narrators like Dr. John Watson and Arthur Hastings-his prejudices and limited powers of observation allow the skills of his partners in crime-solving, Maya and Abdul, to shine. However, Baker is engagingly multi-dimensional in his struggle to move beyond his prejudices and blind

Research Assistant

Explore suggested sources.

- War in the Margins: Illustrating Anti-Imperialism in American Culture
Bishop, Katherine Elizabeth. ProQuest Dissertations and Theses. (2014)
- Mark Twain's Letters, 1876-1880, An Electronic Edition, Volume 2: 1877, © 2001 The Mark Twain Foundation
Twain, Mark. Mark Twain's Letters, 1876-1880. An Electronic Edition, Volume 2. (02 Jan 1900)
- The Indic Orient, nation, and transnationalism:

Brainstorm related research topics +3 more

Ask a question (beta)

- Doc Insights provides enhanced contextual information about a particular resource (e.g. a journal article or book chapter)
- The feature is provider-agnostic and can be integrated with platforms that offer AI tools or capabilities for linking
- Quicklinks must be enabled for AI Doc Insights

Further documentation is located [here](#).

July 9, 2025

The new secondary content type “Online First Article” now displays in the brief result, facets, and Quick Look. This feature is an indication to researchers that the resource has not yet been assigned to a journal issue, and thus lacks enumeration, chronology and page numbers. See [Summon: Glimpability Feature - Ex Libris Knowledge Center](#) for a complete list of

secondary types.

The display text can be configured in the Summon Administration > Translations list.

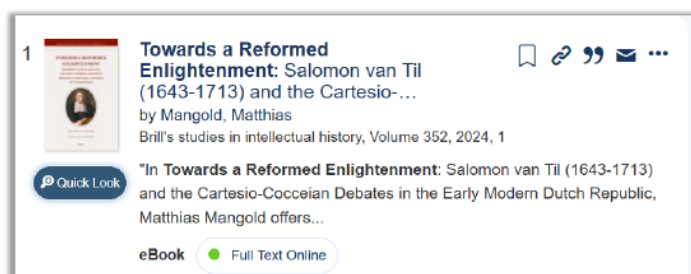
May 7, 2025

CERV Improvement for the Summon Date Picker:

If a user selects one of the Publication Date filters (1, 3, 5 or 10 Years) the end date will no longer default to today. Instead, it will remain open-ended.

- This gives users access to more content
- Includes resources that haven't yet been assigned publication date (e.g. Online First)

CERV Display Series Volume in Brief Results:

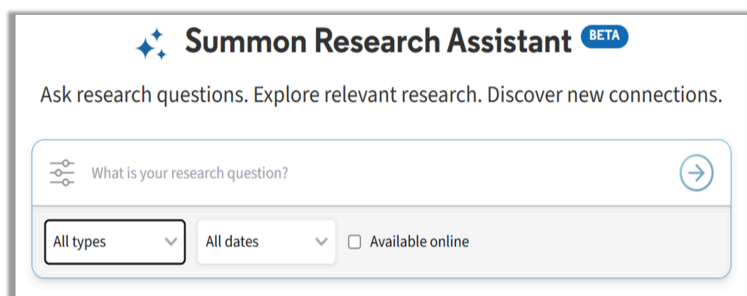


- Gives users more enumeration information up front, in the Summon search results
- Mirrors what is already display in the Quick Look panel

Summon Research Assistant Enhancements:

1. Users can now refine their search queries by online availability, rather than all CDI resources.

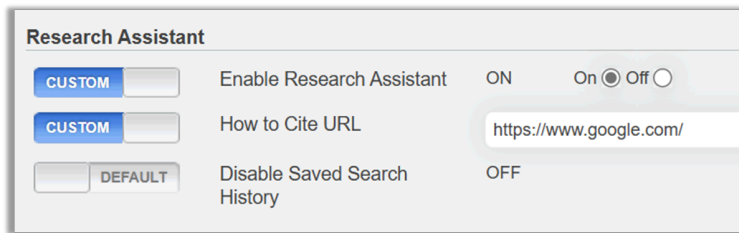
- Users can select the "Available Online" option in the search bar
- The option's value is remembered throughout the session unless the user changes it



2. Retain Research History topics across sessions for logged-in users.

- Up to 200 topics will be maintained in the Research History feature (left panel) if a user logs in
- If the 200 topic limit is exceeded, the oldest topics will be deleted from the log

- This is configured at the institution level in the Admin Console
- By default it is turned ON--if your library opts out of this feature you should change the configuration in the Admin Console



Summon Resolved Issues:

Usage statistics not available, or only partially available since March 6.

- Some usage statistics were not collected between March 6 and May 7
- Once the production release is live those statistics will be collected
- Please note that we cannot recreate the statistics from March 6 to May 7; we apologize for this gap

April 2, 2025

CERV CDI Enhancement for Book Reviews:

Improved identification of book reviews for CDI records, previously classified as articles. This fix includes the following:

- Additional criteria were added to identify book reviews based on information in the title or abstract field. Some examples of such criteria are:
 - CDI resource type is article, and the Title contains the phrase **book review**.
 - CDI resource type is article, and the Title contains an ISBN followed by at least one digit.
 - CDI resource type is article, and the abstract starts with the phrase **Book reviewed in this article**.
- For merged records, the rule for selecting the resource type for logical records was changed for cases where participants from different providers had different resource types. Previously, the resource type found in most of the participants determined the resource type. This is no longer the case for book reviews because preference is given to the resource type instead of simply identifying it as an article.

Summon Resolved Issues:

- Save Items between sessions: You cannot log out of Google.
- Nothing happens after clicking "Sign in with Microsoft" in a Summon saved search - regular login menu works.
- Selected facets display an incorrect amount of facets.
- Summon known item search has a low relevance ranking for the targeted item.

- A Corporate Author link on the Detail Page generated an incorrect search.
- Summon over Alma Course Reserves Page - cannot scroll.
- Clicking the title opens the catalog detail page.

Summon Research Assistant Enhancements:

- Improved labeling and help text for the "How to Cite URL" option in the Summon Admin Console.
- Sources will now display the first author (if multiples exist).

February 5, 2025

Resolved Issues:

- SAML timeout after 15 minutes was extended to 24 hours to support researcher workflows better.
- Chat Widget will now send all emails from noreply@clarivate.com so that the DKIM, DMARC and SPF protocols are properly supported.
- Content Ingestion Report emails:
 - Changed the From address to noreply@clarivate.com.
 - Fixed the use case causing a few emails to contain only the
 HTML element.
- Bulk Export email now correctly displays CJK.
- Impacted Sierra and Koha libraries will no longer experience delayed real-time availability displays on the details page.
- Records whose only rights source is a print-format Library Specific Holdings database will display a **Check Availability** status instead of **Full Text Online**.
- New linker updates for Elsevier databases (ScienceDirect, ClinicalKey, ClinicalKey Nursing, Health, Masson Premium) [360 Link].

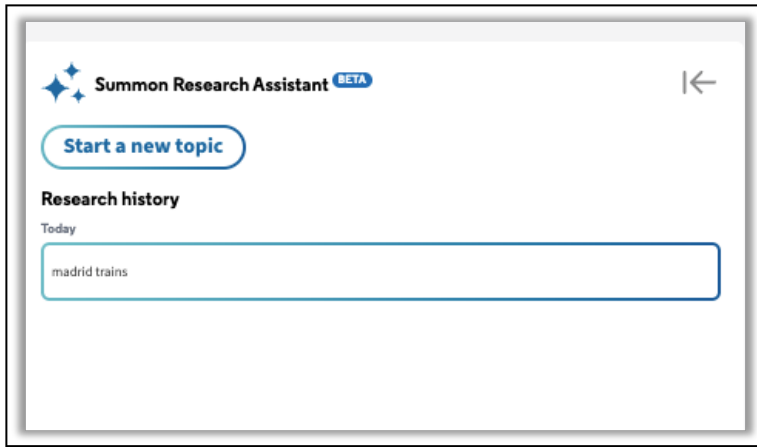
March Release Sneak Preview: Summon Research Assistant

We are finishing up the Summon Research Assistant for delivery to both the Preview and Production environments in our March 5 release. Research Assistant enables natural language queries of your academic content to pinpoint five articles that answer researcher questions. The AI-powered tool synthesizes the critical information from each article's descriptions/abstracts into a summary response and includes links to source references.

Highlights of the Summon Research Assistant:

- Opt-in via the Summon Administration Console, and available from the Summon page menu
- Available to logged-in users and IP-authenticated users
- Built-in accessibility principles
- Responsive design

For example, a search for "**madrid trains**" returns an overview of the sources and the related sources in the response:



RA Search Assistant with Question



RA Search Assistance's Response

Many more details and documentation will be shared in the coming weeks!

December 4, 2024

The following enhancements and fixes are included in this maintenance release.

- Staff can now directly add or paste JS/CSS code into the Summon Admin Console rather than calling an external script. For more information, see [Summon 2.0 External Script](#).
- The Chicago Manual of Style (18th Edition) citation style has been added to Summon Citation formats.
- The Summon Help Document now displays in selected UI language after a UI language change.
- Facet Scrolling: Scroll back to top for new search.
- Back to results now works correctly after using Quick Look.

November 6, 2024

Below are some details for features and improvements in the current release. This summary applies to Summon, Summon over Alma, Sierra via Summon, and Summon API customers. The Summon preview environment for this release is available on October 23.

Enhancements:

1. New! Carousel widget for marketing library content in any external website:

Now you can highlight your unique resources, new subscriptions, special collections, or local creators' content and drive users to Summon for additional research. Using the integrated Widget Builder, you can quickly and easily create an embeddable code snippet of a Summon query that can be used in websites like LibGuides, researchers' pages, the main university or library page, and so forth.



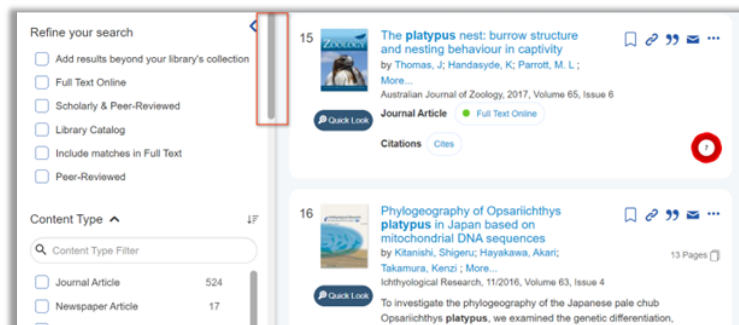
For details on how create your showcase carousels, please see [Summon: Creating a Search Box, Search Widget, or Carousel](#).

2. Improved user experience for facets application –



NERS Enhancement:

Previously, if users scrolled to the bottom of a results page, the facets were not visible, and they had to scroll back up to use them. This new, opt-in feature enables a facet panel that scrolls independently of the results set. Thus, users can easily select and apply refinements regardless of where they are in the results list.



To enable this feature, set the new **Independent Scrolling Enabled** parameter to **ON** on the [Summon Admin Console > Settings > Facet](#) page. For additional information, see [Summon Settings: Facets](#).

3. Open “Search within [journal name]” results in a new tab –



NERS Enhancement:

Previously, the “Search within [journal name]” feature executed the new search in the same tab/window. In response to customer requests, Summon will now open a new tab for searching within the specified journal so as not to lose the original results set and context.

August 7, 2024

Below are some details for features and improvements in the current release. This summary applies to Summon, Summon over Alma, Sierra via Summon, and Summon API customers. The Summon preview environment for this release was available on July 24.

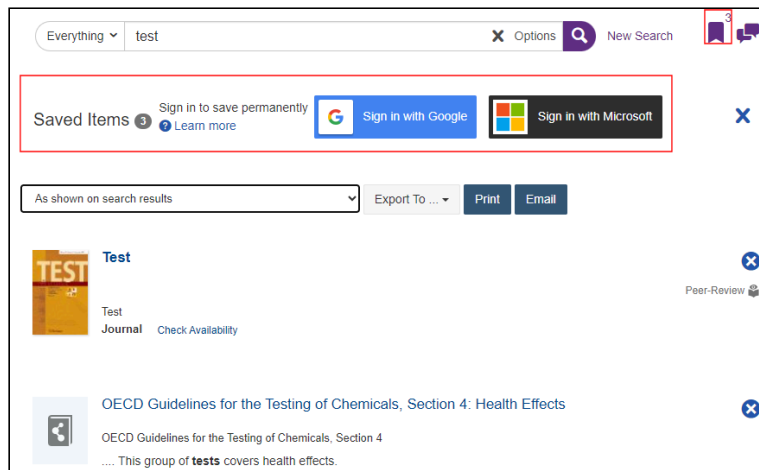
Enhancements:

1. Save Items between Sessions:



NERS Enhancement

Users can permanently save items to their Google, Microsoft, and Ex Libris cloud drives if users are signed-in. For more information, see [Saving Items \(Citations\)](#).



To enable this feature, set the new **Saved Items Enabled** parameter to **ON** on the [Summon Admin Console > Settings > Advanced Search](#) page.

2. Bulk Export for Search Results:



NERS Enhancement

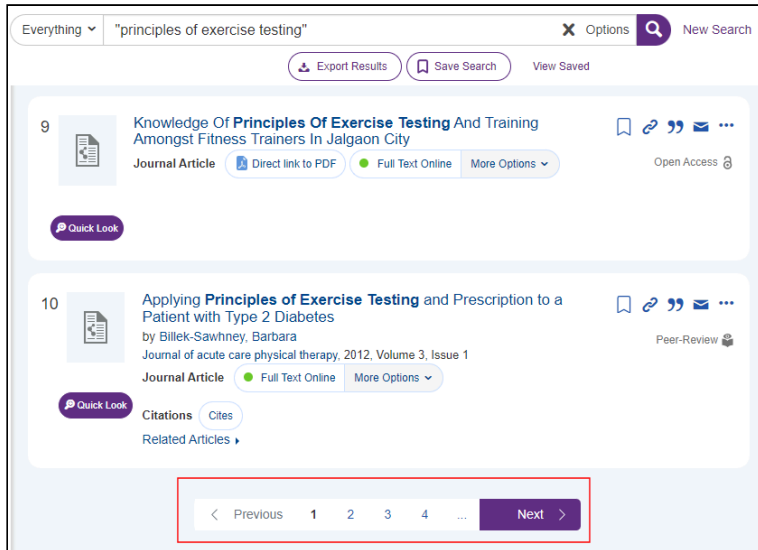
The Bulk export of search results (up to 1000) functionality, which has been available for several preview releases, is now available in Production and includes the following changes based on your feedback:

- Translations for email subject, report title, and default email message text.
- Return a URL for the Summon search result in the BookMark field in the .csv export report instead of the bookmark hash.
- Return the standardized date format YYYY-MM-DD.
- Clearer messaging for the 1000 item limit.

For more information, see [Exporting Search Results and Saved Citations](#).

3. Replace Summon Auto-Scroll with Pagination:

To address a critical accessibility concern, we have removed the “infinite” or auto-scroll navigation for search results and now provide paged results of either 10 or 25 items per page.



You can configure whether to display 10 or 25 results per page by configuring the **Default Number of Search Results** parameter on the **Summon Admin Console > Settings > General** page.

4. Verbatim Search Operator for Exact Matching:



NERS Enhancement

Users can now disable linguistic features (such as stemming, spelling/casing/character normalizations and synonyms) to match exact phrases verbatim. This is done by adding an equals sign (=) after the closing double quote of an exact phrase. Examples:

- **"sea otter"=** – Disables pluralization to retrieve results that include the exact phrase **sea otter** and not **sea otters**.
- **"theatre"=** – Disables spelling variations to retrieve results that include the exact phrase **theatre** and not **theater**.

July 10, 2024

Enhancements:

As a reminder, Bulk Export will be available in Production in the August release. We've made a number of enhancements for the Preview environment based on your feedback and have additional ones scheduled.

- Return a URL for the Summon search result in the BookMark field in the .csv export report instead of the bookmark hash.
- Return the standardized date format YYYY-MM-DD.
- Bulk export email not sent for some language results (CJK, Russian).

Resolved Issues:

- Summon Quick Look pane was prefixing the 590 note with the text **MARC_**.
- A hash tag in a notes field broke the text into separate lines in the display.
- Search Scopes were missing translations for the following labels: **Collections to search for** and **You are about to leave**.
- **Summon over Alma only**: the language parameter in the link to My Account was not resolving correctly.

June 5, 2024

Below are some details for various fixes and improvements. This summary applies to Summon, Summon over Alma, Sierra via Summon, and Summon API customers.

Enhancements:

- The Summon Notes field was removed from the default search fields in November 2023 for performance reasons. We implemented a new solution for libraries that want to search Notes by default, in addition to the existing “Notes:” syntax and dedicated Notes index in the Advanced Search options.
 - If you would like Notes fields searched by default, please open a case with Support to enable this feature.
 - This applies to Summon UI users as well as Summon API users.
 - API users, please see [Include Notes Matches](#) on the Ex Libris Developer Network
- New authentication option: Summon now supports the ability to immediately redirect users to a SAML login rather than the Summon splash page if they are not already IP authenticated. This scenario is primarily for secured, private libraries but can be used by any Summon customer. Please contact support if this is an option you’d like to enable.
- Normalized Subject headings now display in alphabetical order.
- The default value of the **s.include.ft.matches** API parameter is changing to **false** to be consistent with the default behavior of the Summon UI. Setting it to **false** helps return more focused search results for users.

Resolved Issues:

- Customizer: missing translation in preview environment - "This item cannot be requested" for Summon via Sierra libraries.
- For some customers a subset of titles linked to the OPAC instead of the Summon details page.
- Library Notes (5XX) displays incorrectly due to hash character.
- The permalink label pop-up in Summon obscures the "x" to close the permalink pop-up.
- Summon via Sierra users cannot access My Library Card if there are no checked-out items on their account.
- Removed the errant “Leave Site?” prompt when attempting to save changes to the [Summon Admin Console > Pages > Sections](#) page.

May 1, 2024

Below are some details for features in the current release as well as various fixes and improvement. This summary

applies to Summon, Summon over Alma, Sierra via Summon, and Summon API customers. The Summon preview environment for this release was available on April 17.

Enhancements:

1. Bulk Export of Search Results:



NERS Enhancement from the



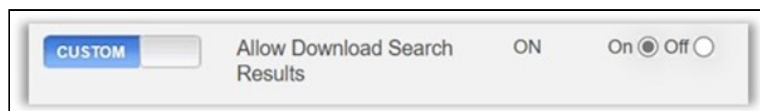
Idea Exchange

Note

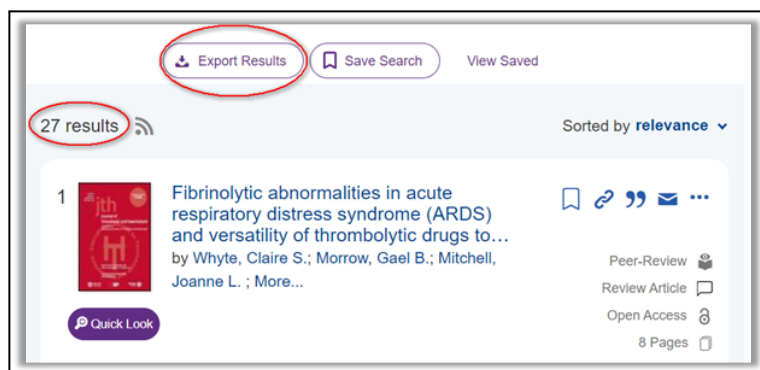
Preview only! This will not be released to production on May 1. We are interested in gathering feedback from the Summon community before finalizing feature details. Please provide feedback by [submitting a new Support case](#) or by posting to the [Summon Listserv](#).

Bulk export allows users to download the results (up to 1000) of a search query in one action, as opposed to exporting titles individually. The results are sent to the designated email address in a .csv file with commonly used metadata fields.

To enable this feature, go to **Summon Administration Console (Preview version only) > Settings > Search Results** and enable the new parameter **Allow Download Search Results**.



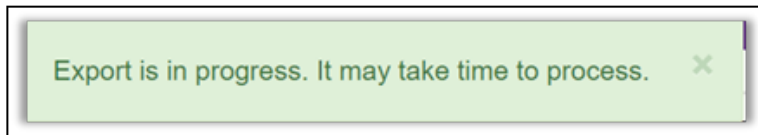
Once enabled, when a search query yields 1000 or fewer results a new button labelled “Export Results” will appear at the top of the results list.



If the query yields more than 1000 results the, button will not appear.

Selecting **Export Results** opens a new form that asks for a mandatory email address, optional message text, and a reCAPTCHA confirmation the first time patrons use the feature in a session.

After submitting the form, a confirmation message appears on the screen for several seconds. Depending on the size of the file, it may take several minutes to reach the email account.



2. Display Full Title on Hover:

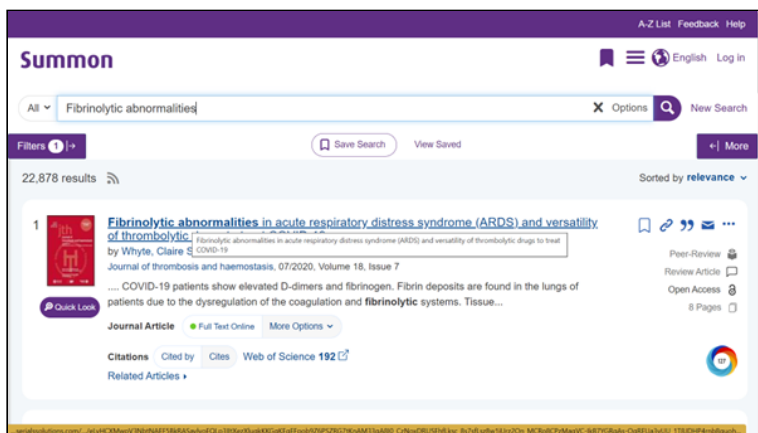


NERS Enhancement from the



Idea Exchange

To provide more clarity and context to users with smaller screens and screen resolutions, hovering over the title of a result will now display the full title.



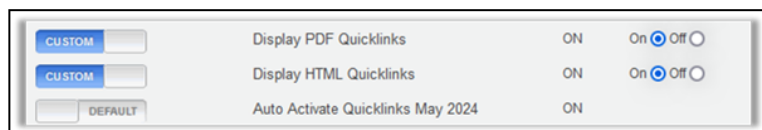
3. Auto-enable Quicklinks

With the May release, we will enable Quicklinks for all Summon libraries automatically! Why? Quicklinks, which have been live since 2021, enable users to go directly to the full text with one click to either a PDF or HTML file. Quicklinks

have a 99% linking accuracy rate to more than 1.5 billion records and are supported by many providers.

To support this feature, the **Auto Activate Quicklinks May 2024** parameter has been added to the Settings page ([Summon Administration Console > Settings > Search Results](#)):

- If you currently have Quicklinks enabled, take no action.
- If you want to enable Quicklinks on May 1, take no action.
- If you do NOT want to Quicklinks enabled automatically, set the **Auto Activate Quicklinks May 2024** parameter to **OFF**.



Note

After the May release, you may opt out of using Quicklinks at any time.

February 14, 2024

Below are some details for features in the current release as well as various fixes and and improvement. This summary applies to Summon, Summon over Alma, Sierra via Summon, and Summon API customers. Please *note that there is no Summon preview environment for this release*.

Enhancements:

1. Summon + Canvas LTI Integration

Summon + Canvas clients are now able to take advantage of LTI (Learning Tools Interoperability), a standard that helps securely integrate learning management systems with remote platforms. Once the integration is configured in both systems, Canvas users (instructors and students) can access full text content in Summon directly from Canvas without the need for a proxy or other authentication system.

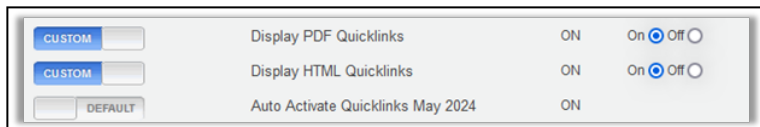
This integration supports the following workflows:

- A Canvas administrator can make a Summon Canvas app available to instructors.
- A Canvas course instructor can:
 - Add the library's Summon URL to the course as a virtual tool.
 - Add a bookmark to a specific record in Summon with appropriate descriptive text.
 - Add a Summon search URL.
- A course participant can
 - View Summon records (bookmarks).
 - Launch search results in Summon from the pre-defined URL as an authenticated library user (i.e. no additional proxy or login required).

2. Auto-enable Quicklinks

We are preparing to enable [Quicklinks](#) for all Summon libraries in May! Why? Quicklinks, which have been live since 2021, enable users to go directly to the full text with one click to either a PDF or HTML file. Quicklinks have a 99% linking accuracy rate to more than 1.5 billion records and are supported by many [providers](#).

Please note that you may opt out of using Quicklinks any time you want.

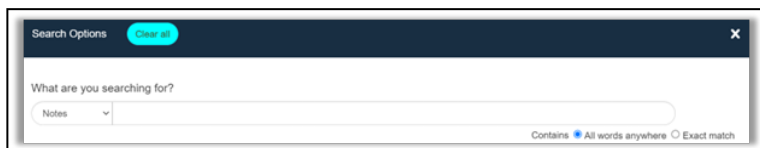


What does this mean for you?

- If you currently have Quicklinks enabled, take no action.
- If you do not already have Quicklinks enabled, the new setting (above) will default to **On** in the February release. For now this is information only. Once the May release is live:
 - Quicklinks are automatically enabled if this parameter's value is **On**.
 - Quicklinks are disabled if you change the parameter's value to **Off**.

3. Notes Search Field in Summon Advanced Search

There is now a dedicated field for searching notes in the Advanced Search interface. You can add "Notes" to the list of visible fields in [Summon Administration Console > Settings > Advanced Search](#). Enabling this field will make the field appear in the options in the order specified.



By default these [fields](#) are included in the Notes search, but each library may have customized the mapping:

500 \$a, 502 \$a\$b\$c\$d\$g\$o, 362 \$a \$z; 506 \$a\$b\$c\$d\$e; 510 \$a\$b\$c; 511 \$a; 518 \$a; 530 \$a\$b\$c\$d; 533 \$a\$b\$c\$d\$e\$f\$m\$n; 534 \$p\$a\$b\$c\$e\$f\$k\$l\$m\$n\$t; 538 \$a\$i; 583 \$a\$b\$c\$d\$e\$f\$h\$i\$j\$k\$l\$n\$o\$x\$z

Resolved Issues

On the "Cited by" tab trying to scroll beyond the Default Number of Search Results yielded a "Citations failed to load. Please try again." message. This is now resolved.

Translations:

- New: "(Search Scope) All"
- "Retracted Publication" now accurately displays the translated phrase
- New: "Secondary Content Type"
- SoA Real Time Availability: "Available" now successfully translates

November 1, 2023

Below are some details for features in the current release as well as various fixes and an improvement. These enhancements include:

1. Send Summon Language Settings to 360 Link:



NERS Enhancement from the



Idea Exchange

- Summon will now pass the language parameter from the results page to 360 Link to better ensure that the returned page is in the same language.
- No configuration is required.

2. Normalized Subject Headings: A CDI Update

- All English language subject headings in CDI have been mapped and deduped against LCSH (Library of Congress Subject Headings) and MeSH (NIH Medical Subject Headings).
- Institutions can now use these headings for their subject facet in place of the current.
- Subject headings that could not be mapped, including all non-English subjects, are still available for display when the new normalized subject headings are in use.
- To configure the use of Normalized Subject Headings for your facets, you'll find the controls in the Admin Console, under Settings > Subject Terms:
 - For the control Use Normalized CDI Subjects, switch from Default to Custom and set the field to **ON**.
 - Click the **Save Settings** button and within 5 minutes the update should be applied to your instance of Summon.
- To display subject headings that could not be normalized on the Quick Look pane, you will find the controls in the Admin Console under Settings > Quick Look.
 - To display the keywords, switch the Display Keywords control from Default to Custom and set it to **ON**.
 - When enabled Keywords can be dragged/dropped to prioritize their order and determine if they are expanded/collapsed.
 - Click the **Save Settings** button and within 5 minutes the update should be applied to your instance of Summon.

3. Scopes Update

- Based on your feedback, we have updated how Scopes are represented in the Summon UI.
- Facets applied as part of a Scope are now displayed at the top of the Facet Pane.
- Changing any of the parameters for the scope will now display a warning dialog box that the user is about to leave the selected scope.

For more information about using Scopes, see [Summon: Search Scopes](#). For configuration information, see [Summon: Administration Console: Settings](#).

4. Display 5xx Notes Fields:



NERS Enhancement from the



Idea Exchange

- *This functionality will require mapping and content processing for your specific institution before any content is available for display in your instance of Summon.*
- Institutions will now be able to display 5xx notes fields on the Quick Look panel in the Summon search results page.
- To enable the display of the 5xx Notes field in Quick Look, you'll find the controls in the Admin Console under Settings > Quick Look.
 - Switch the Display Library Notes control from Default to Custom and set it to **ON**.
 - When enabled Library Notes can be dragged/dropped to prioritize their order and determine if they are expanded/collapsed.
 - Click the **Save Settings** button and within 5 minutes the update should be applied to your instance of Summon.

Note

The Summon Notes field was removed from the default search fields in November 2023. As a result, local catalog metadata mapped into the Notes field can no longer be searched from the basic search field. Instead, Summon users can search in the Notes field using the field search syntax (for example, Notes:"some notes"). The notes field will be added to the Advanced search drop-down options in February 2024.

5. Unpaywall Indexing

- Unpaywall functionality is being updated: Unpaywall will now be available as a collection you can subscribe to in Client Center. For more information, see [Summon: Unpaywall Database](#).
- Unpaywall will now be an option under the Database facet.
- Records merged with Unpaywall records will be flagged as having an Open Access (OA) option; this will improve OA labeling and faceting on the search results page.
- Indexed Unpaywall links will be returned by CDI as regular IEDL links and will be prioritized using standard linking logic.
- Unpaywall links will be returned as the "Link to PDF" element on the Summon search result when there is no available Quick Link.
- Adding Unpaywall to your instance of Summon will follow the same process as adding any other collection to Summon.

6. Prevent Ebook and Computer File Records from Merging:



NERS Enhancement from the



Idea Exchange

- Any records marked as a Computer File will no longer be merged with other records.
- This feature requires no configuration.

Note

Because this feature requires content updates, the changes will be made as the appropriate collections with affected records are refreshed.

September 6, 2023

Below are some details for features in the current release as well as various fixes and an improvement. These enhancements include:

- Search Scope names now maintain case, and are not converted to Title case.
- Addressed issue causing some Summon collection facets with custom database names to return zero results.
- Fixed issue with DOI links in Quick Look; links now change when browsing.
- Include providers named “Multiple Vendors” in eJournal coverage display.
- Improved Refine Your Search options for physical books; this can now be enabled independently in basic and advanced search.
- Improved Advanced search drop-down text display; previously it was truncated on small screens.
- Addressed issue with legacy Summon Advanced Search URLs using /advanced#!/ not working as expected.
- Improved display behavior when cursor is hovering over the database facet.
- Search widget should now perform searches that include an apostrophe.
- Added missing Spanish translations to Help menu.

August 2, 2023

Below are some details for features in the current release as well as various fixes and an improvement. These enhancements include:

1. **Scopes for Summon Searches**

- Scopes allows users to ‘pre-filter’ their search using a drop-down in the search box, limiting the search to a specific group vs. searching the full catalog. For details, see [Summon Search Scopes](#).
- Institutions can create multiple Scopes, name each Scope, and prioritize display order.
- Scopes can be limited by ISSN.
- Refine Your Search options are also available for use in Scopes, including:
 - Full Text Online
 - Include Matches in Full Text
 - Library Catalog
 - Open Access

- Peer-Review
- Physical Books in Library Catalog
- Scopes can be limited by Library Locations.
- Scopes can be limited by Content Type, Discipline, Language, New Records, and Time Period.
- To configure this functionality in Summon, you'll find the controls in the Admin Console, under Settings > Search Scopes. For details, see [Summon Admin Console Settings - Search Scopes](#).
 - Any existing scopes, if any, appear at the top.
 - To add a new Scope, click the Add New Search Scope button; This will open a blank form below the button that allows you to do the following:
 - Add a Name that will be used for display in the Summon User Interface (UI).
 - Add a Description for internal use that institutions can use to describe the composition of the Scope.
 - Use an Advanced Search form to add configurations to the Scope.
 - Add up to ten ISSN in the first field to limit to those resources.
 - Set dates to limit results to a specific time period.
 - Use any of your Refine Your Search criteria to limit results.
 - Use the Content Type, Discipline, and Language facets to include or exclude values.
 - Include records based on Library Location.
 - Include New Records from the last 7, 30 or 90 days.
 - To work with existing scopes:
 - Drag and drop the scopes from the disabled to the enabled column to enable that scope for use and display in your Summon UI; move it back to disable it.
 - Scopes are displayed in the order they appear in the Enabled column; drag and drop each tile to modify the order of display.
 - To edit a scope, click on the Edit button; in a moment, the form will refresh with the New Scope form displayed pre-populated with the elements of the selected Scope; make changes as you would for a new scope and click Save to keep your changes.
 - To delete a scope, click the Delete button; you will be asked to confirm the deletion; confirming will delete the Scope.

2. Added "Include Matches in Full Text" as a search suggestion on the Zero Search Results Page:



NERS Enhancement from the



Idea Exchange

- Now a “Include Matches in Full Text” link will be provided as a suggestion on the Zero Results Page when appropriate.
- Option will appear automatically if Include Matches in Full Text Override facet is set to Enabled and the search does not already include the Include Matches in Full Text facet.
- There is no configuration required for this link to appear on the Zero Search Results Page.

3. Customize Order of Elements in the Right Pane:



NERS Enhancement from the



Idea Exchange

- Improvements include the ability to order elements in the Right Pane and set the number of results displayed by the Springshare Database Finder Widget.
- For the Springshare Database Finder Widget, your institution can now select the number of results returned in the Springshare A-Z recommender, with the default being 10.
- To set the order of display for Database Finder, Custom Panels, and Topic Explorer, you'll find the controls in the Admin Console, under Settings > Custom Sections.
 - Enable or Disable Database Finder, Custom Panels, and Topic Explorer by dragging and dropping the related tile to the Enabled or Disabled column.
 - Use the order of elements in the Enabled column to determine the order of display in the Summon UI.
- You will find the controls to configure the number of results returned by the Springshare Database Finder Widget in the Admin Console, under Recommender > Springshare, in the second section A-Z Database Settings.
 - Use the dropdown menu labeled Set default number of results page to set the number returned by the widget.
 - If you have customized the order of Topic Explorer elements or included the Database Finder Widget, this may not appear in your preview instance.
 - If you'd like you can reconfigure Preview to reflect Production.
 - This should not be an issue when the release moves to Production on August 2; your configurations of the right-hand column should be maintained. Additional changes using the new functionality will need to be applied in production for any change to take place, as always.

4. Improved Quick Look Pane layout:



NERS Enhancement from the



Idea Exchange

- Improved layout to better handle varying lengths and completeness of metadata, using a one column layout for all responsive design sizes (desktop, tablet, and smartphone).

- 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.
 - Subjects are expanded by default.
 - Record Details are collapsed by default.
 - Syndetics Elements (includes Summary, Look Inside, Tags, Awards, You May Also Like, Reviews, handle as group) are expanded by default.

5. Warning to Save Changed Data

- 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.

May 3, 2023

Below are some details for features in the current release as well as various fixes and an improvement. These enhancements include:

1. **Google Analytics 4 and Tag Manager Support:**

- Summon now supports the use of the most recent version of GA4 and Tag Manager.
- To configure this functionality in Summon, you will find the controls in the Admin Console, under Settings > General:
 - To begin tracking activity for your site, switch the Google Analytics Tracking Code control from Default to Custom, enter a tracking code provided by Google in the form, and then click Save at the bottom of the page.
 - To implement Google Tag Manager for your site, switch the Google Tag Manager Tracking Code control from Default to Custom, enter the code provided by Google in the form, and then click Save at the bottom of the page.
 - Use of Google Tag Manager is not required for use with Google Analytics; see the Google documentation for more information on configuring Google Analytics

Note

Both the Google Tracking Code and Tag Manger Code are unique identifiers provided by Google for use with your account; please do not enter any script (such as JavaScript) into the provided blanks.

-
- Google Analytics will stop processing data for their previous product, Universal Analytics, on July 1, 2023.

2. **Mandatory Sender Email Field for Email This Item:**

- 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.
- To configure Mandatory Sender Email Field for Email This Item, you will find the controls in the Admin Console,

under Settings > Search Results:

- To add the Sender Email field to emailed citations, set Sender Email to Email Citations to Custom > **On**.
 - To make the Sender Email field required, set Sender Email to Email Citations Required to Custom > **On**.
 - Then click **Save**.
- **LTI Support for Summon:**
 - Initial development work for LTI integration will be included in this release as well, however, deployment of this functionality is dependent on integration and testing with LMS systems and will be completed after the release is complete.
 - We will follow up with more details on timelines for integration and implementation of LMS support.

March 1, 2023

We are pleased to notify you that as part of the Summon® March maintenance release we have added a few enhancements we'd like to bring to your attention. These enhancements include:

1. Citation Search Improvements using GROBID Algorithm, Based on AI/Machine Learning:

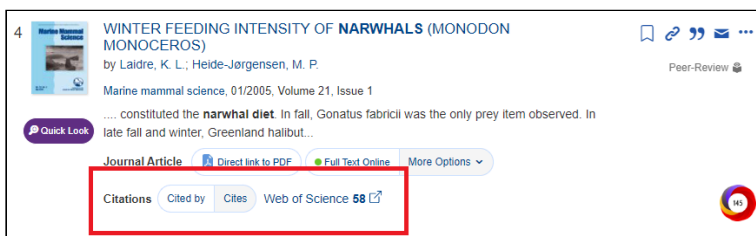
Many users search for known items by copying and pasting entire citations from a webpage or a list into a Summon search box. While Summon already supports a majority of these searches, we still had cases where extra information in these searches confused the algorithm and prevented items from being found. We now use an Open Source AI tool called Grobid to parse the search query so that Summon can find and return the cited items in search results. Our test results show that this has solved all reported cases where these searches previously failed.

2. Publication Date Normalization: Select the Best Publication Date for Rights, Faceting and Display:

Sometimes metadata for an article from different sources has different dates, leading to confusion when all dates are searchable but only one is displayed. Because this issue is usually caused by individual participants in a merged record, we have changed how the merged date is determined and used for article type records. We will now prefer the date provided by a majority of data sources and use this single date for facets, display, and rights calculation. In cases where a single date does not hold the majority, we will use the latest date.

3. Citation Trail and Web of Science Display Improvements:

- We adjusted the presentation for both Citation Trail and Web of Science.
- Citation Trail links are now buttons, to conform to other elements in the brief result.
- Web of Science is now spelled out and indicates the link will take users to a different website.



4. Additional Fixes and Improvements:

- Added support back for links generated from the legacy Advanced Search page (URL containing the advanced#!/search? syntax).
- Included results for matches in the DEWEY field when a user specifies "Call Number" in the Summon Advance Search.
- Leading character in translated strings are no longer automatically converted from lower to upper case.
- Added translations for the Course Reserves page.
- On the Advanced Search form, the translated '1 Year' publication date filter button text is now displayed on two lines to match the other publication date filter buttons.

If you have any questions about Summon, please contact Support by using chat options ([360 chat](#); [Intota chat](#)) or by submitting a case through the [Support Portal](#).

February 1, 2023

Below are some details for features in the current release as well as various fixes and and improvement. This summary applies to Summon, Summon over Alma, Sierra via Summon, and Summon API customers.

Enhancements:

1. Advanced Search Improvements:

- Multiple search boxes are now stacked one on top of the other. Previously, these boxes appeared in two columns.
- Ability to customize colors for the **Clear All** button – To configure the colors for these buttons:
 1. Open the Summon 2.0 Customizations section (**Admin Console > Settings > Summon 2.0 Customizations**).
 2. To change the Clear All button color, change the **Header Badge "Clear All" Back Color** field to **Custom**, and then enter the hexadecimal value for the desired background color.
 3. To change the **Clear All** button font color, change the **Header Badge "Clear All" Font Color** field to **Custom**, and then enter the hexadecimal value for the desired font color.
 4. Select **Save Settings**.
- Addressed issue with translation of "Search Options" in advanced search not working in all languages.
- Library location facet values selected on Advanced Search are now displayed in the facet pane on the Search Results page.
- Label formatting for "1 Year" button was previously inconsistent with other limiter buttons in Firefox; the label now appears on two lines to match the others.

2. SAML Login Available for Saved Searches for Sierra via Summon Institutions:

- For Sierra via Summon sites, institutions can now offer SAML as an option for authentication for Saved Searches in addition to the existing Google and Microsoft logins.
- Saved Searches using SAML will be stored on Ex Libris servers. Note that Saved Searches using Google or

Microsoft logins will continue to be stored on Google Drive or MS OneDrive.

To configure SAML for Saved Searches:

1. Open the Advanced Search section ([Admin Console > Settings > Advanced Search](#)).
2. To enable the Saved Search capability, change the **Saved Search Enabled** field to **Custom**, set it to **ON**, and then click **Options** to display the **Saved Search Types** field.
3. To specify which types of cloud drives are available to users, drag the permitted cloud drives to the **Enabled** column in the **Saved Search Types** field.
4. Select **Save Settings**.

For information on how to use and configure Saved Searches, see the following documents: [Using Saved Searches](#) and [Configuring Advanced Search](#).

Note

You must have SAML for Sierra via Summon activated prior to implementing this feature.

Additional Fixes and Improvements:

- Addressed issue preventing some public notes from being displayed in Quick Look.
 - Fixed issue causing some Open Access links from the Open Access icon to not return full text.
 - E-journal coverage ranges will now display Custom Database Names when available.
 - Adjusted logic for reviewing links provided in emails from the Email Citation functionality.
 - Previous functionality designed to ensure no malicious URLs were included in emails; if a URL did not pass the check, the email would not be sent.
 - Now the security check has been adjusted to ensure URLs from Summon or using EZProxy are included in emails; if the URL does not pass the check, the email will still be sent but the URLs will be removed.
 - Addressed issue with View in Classic Catalog link missing from record in Summon for Sierra via Summon customers.
 - Institutional Email field in the Provision 360 Summon of Summon Integration Dashboard now supports email addresses that contain an underscore.
 - Removed the white blank bar from the bottom of the No Results page.
-

November 16, 2022

Below are some details for features in the current release as well as various fixes and and improvement. As always, your contribution helped shape this release. Many of these ideas originated on the Idea Exchange and were the top votes for the NERS process for 2022. Your participation in the IGELU and ELUNA NERS process guaranteed these would be delivered this year.

Enhancements:

1. **Advanced Search Improvements:**

- Updated the look and feel based on user feedback.
- New design that makes selecting options easier, including ability to exclude.
- Larger panes for viewing more options for each filter.
- More Refine Your Search options available for use on the Advanced Search form, including the Include Matches in Full Text and Limit to Items in Catalog options.
- Search options should persist when moving from the search results to Advanced Search and back; any facet values selected from the search results page for options that are not available on the Advanced Search page are reflected at the bottom of the form.
- To configure the Advanced Search:

Note

We are currently reviewing additional facets for the Advanced Search page, such as Library Location, for inclusion in an upcoming release.

- Under [Admin Console > Settings > Advanced Search](#), you will find all the options to configure the form.
- To enable items from the Refine Your Search facets, first change the **Refine Your Search Facets Enabled** setting from **Default** to **Custom**, select **ON**, and then click Options to expose facets available to be either enabled or disabled; drag and drop each facet to the desired configuration, then click Save at the bottom of the page.
- To enable Content Type, Discipline or Language, you'll find the options to turn these on or off under [Admin Console > Settings > Advanced Search](#); click **Save** at the bottom of the page and your changes will take effect in five minutes or less.
- Any new labels can be modified under the the [Admin Console > Translations](#) tab.
- The new Advanced Search modal header color uses the same color as the Quick Look modal. You'll find the control for this under the [Admin Console > Settings > Summon 2.0 Customizations](#). The **Secondary Side Pane Background Color** option controls the header for both the Quick Look and Advanced Search.

2. Coverage Dates for eJournals: –



NERS Enhancement and



Idea Exchange:

- Coverage dates are now displayed for journal-level records:
 - In the brief results, a summary is presented with a link to more details.
 - In the Quick Look pane, journal coverage details are displayed, including the database, provider and coverage range, with a link to view details in your e-journal portal.
- You can enable this feature under the [Admin Console > Settings > Search Results > Display Journal Coverage Ranges](#).

- New labels for coverage ranges can be found in the Admin Console under the Translations tab.

3. Open Access Links for Open Access Records: –



NERS Enhancement and



Idea Exchange:

Note

Many Open Access records will have links to OA content now, this feature also requires an update to the index to enable more comprehensive coverage of linking

- You can now include a link to Open Access content in the brief results regardless of your subscription status or linking preferences, so that an Open Access link is always displayed; previously you needed to subscribe to a collection for the link to appear.
- When enabled, the Open Access icon on the result is linked directly to the Open Access source.
- If you have subscribed to an Open Access source, the link from the subscribed document is returned; otherwise, the best available Open Access link will be used.
- You can turn this feature on or off under the [Admin Console > Settings > Search Results > Open Access Link](#); default is set to **OFF**; to turn on, switch the Open Access Link from Default to Custom and select **ON**; click **Save** at the bottom of the page and your changes should be reflected in five minutes or less.

4. Collection Discovery for Summon over Alma: –



NERS Enhancement and



Idea Exchange:

- Collection Discovery is now available for all Summon over Alma customers.
- When enabled, the Collections link will display in the navigation and in the drop-down menu.
- Clicking on the Collections link opens the page in a new tab.
- Collection Discovery itself is managed in Alma. To display a link in Summon, under the [Admin Console > Settings > Settings for Alma Links](#), you can turn on a link that appears in the hamburger menu in the upper right corner of the Summon results page.

5. Web of Science Citation Counts for All Summon Institutions:

- Web of Science citation counts are now available to all institutions in their brief results in Summon:
 - Citation counts for Institutions that have a subscription to Web of Science will continue to work as previously, linking to more detailed content at Web of Science.
 - For institutions that do not have a subscription, links to Web of Science will provide a free version of Web of

Science information.

Additional Fixes and Improvements:

- Linking now includes Referring URL Support for institutions preferring this method for linking to content vs. using a proxy or VPN.

August 3, 2022

Below are some details for features in the current release as well as various fixes and improvement. As always, your contribution helped shape this release. Many of these ideas originated on the Idea Exchange and were the top votes for the NERS process for 2022. Your participation in the IGELU and ELUNA NERS process guaranteed that these would be delivered this year. And in November we'll be delivering more.

Enhancements:

1. User Interface Improvements:

1. Quick Look Pane (previously called the Preview Pane):

- New layout and design of preview information.
- Addition of a Quick Look button over the thumbnail upon hover.
- Ability to navigate from one result's Quick Look to another.
- Responsive design includes tablet and mobile view.

2. Mobile enhancements:

- Addition of Custom Panels to mobile view
- Controls to expand or collapse Facets and Custom Panels on smaller screens, and better visual indicators for this functionality.

3. Ability to specify the order of Refine Your Search options in the Facet Pane:

To set the order of items under Refine Your Search:

1. On the [Admin Console > Settings > Refine Your Search](#) page, drag and drop values to the **Enabled** column in the order you'd like them to appear in the Facet Pane
2. Click **Save Settings**.

4. Ability to set the number of Custom Panels displayed by default before displaying the More link, including turning off the More link entirely:

To disable the More link:

On the [Admin Console > Settings > Custom Sections](#) page, switch the **Show 'More' enabled** option from **Default** to **Custom**, and then select **OFF**. The default is set to **ON**.

To customize the number of Custom Panels displayed when the More link is enabled:

On the [Admin Console > Settings > Custom Sections](#) page, switch the **Default sections displayed** option from **Default** to **Custom**, and then select the number of panels that you want to appear. The default is set to **3**

5. Improved visibility for Saved Search / View Saved links.

2. Custom Citation Styles –



Idea Exchange:

- Ability to use citation styles from the Citation Style Language project as citation styles in Summon.
- For details on how to enable this functionality with the [Admin Console > Settings > Citation Formats](#) page, see [here](#).
- You can find information on how to add or modify citation styles to CSL at <https://citationstyles.org/>.
- Previously configured citation formats, provided courtesy of Refworks, are still available and can be managed under Enable Refworks Citations, however, when configuring citations, you will need to choose between using the previous formats or using the new custom citations.

3. Refine Content Type Web Resource to Identify Online Newspaper Articles –



NERS Enhancement and



Idea Exchange:

- Records currently classified as **Web Resource** and having one of the following titles have been reclassified to **Newspaper Article**: The Washington Post (Online), The Baltimore Sun (Online), New York Times (Online), Los Angeles Times (Online), USA Today (Online), Tampa Bay Times (Online), Rockland County Times, Kenora Daily Miner and News (Online), The Chatham Daily News (Online), The Huffington Post (Blogs on Demand), The Business Insider (Blogs on Demand), Washington Post – Blogs, News (Westport, N.Z.), The Economic Times e-paper, Hartford Courant (Online), Chicago tribune (1963), The Times of India (1861-current), The Toronto Star (Online), Buffalo News, and The Atlanta Journal - Constitution (Online).
- Implementation of this improvement requires updating content, and should be implemented for appropriate collections when the content is next processed.

4. Sierra via Summon:

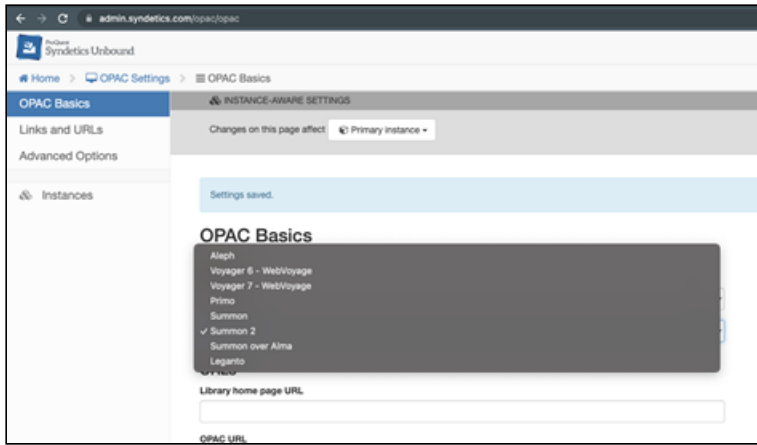
- Ability to customize My Library Card page by institution; institutions can now turn on or off individual components on the My Library Card Page.
- Continued development on SAML for SvS.

Additional Fixes and Improvements:

Linking now includes Referring URL Support for institutions preferring this method for linking to content vs. using a proxy or VPN.

Please Update Your Syndetics Unbound Settings for Improved Integration:

As part of the upgrade for the new Quick Look, we have improved our integration with Syndetics Unbound. If you are a Syndetics Unbound subscriber, change the OPAC vendor to **Summon 2** instead of **Summon** on the [Home > OPAC Settings > OPAC Basics](#) tab to ensure that this is working properly in the new Quick Look.



February 2, 2022

Below are some details for features in the current release as well as various fixes and improvement.

Enhancements

1. User Interface Improvements:

1. Added the ability to customize colors for new elements in Facet pane. New elements, most of which are found at the bottom of this panel, include:
 - Header Badge (section at the top of the facet pane) “Clear All” Back Color
 - Header Badge “Clear All” Font Color
 - Action Icons Color (Save search, quote, email, additional actions)
 - Checkmark Color (for selected facets)
 - Facet Hover Background Color
 - Badge Applied Color (summary count of selected include facets at the top of each facet)
 - Badge Negated Color (summary count of selected include facets at the top of each facet)
 - Publication Date Button Color
 - Publication Date Selected Button Color (icons inside button/hover effect)
 - Custom Publication Date Opened Background Color

To customize the colors, in the Admin Console, go to Settings > Summon 2.0 Customizations.

2. On/Off toggle added in Admin Console for More Links option

To toggle this on/off, modify the **Enable Additional Full Text Links** option in Admin Console > Settings > Search Results.

3. Addressed issues with inconsistent display of Availability green dot.
4. Fixed placement and text sizing for query expansion text (example: “including ‘myocardial infarction’; just search ‘heart attack’”).

5. Addressed issue with toggle for Topic Explorer appearing for sites with Topic Explorer disabled.

2. Translations / Label Fixes:

1. Added values for new labels to the Translations tab in the Admin Console.

To modify translations, in the Admin Console, go to Translations. If you need help finding a specific value to translate, you can use your browser's Find functionality (CTRL+F in many cases).

2. Translations of individual facet values should be displayed in the facet pane.
3. Changed "x" for multiple copies (as in "5x" available) to "copies"; this can also be modified on the Translation tab.

3. Integration Improvements:

1. Addressed issue with Talis bookmarking integration.
2. Addressed issue with Sierra via Summon Reading History returning an error.
3. Improved availability response display for Sierra.
4. For Summon over Alma clients, changed the default display text for **Alma Provider** to **Library Catalog**, which can be customized under Translations.

4. Ability to Block Display of Subject Terms

As part of our Diversity, Equity, and Inclusion work, we have added the ability to block the display of specific Subject Terms on an institution-by-institution basis. Some subject terms kept in records for archival purposes or from a specific institution that could be objectionable for your institution or patrons could display in facet values. While these objectionable terms can be useful for a variety of reasons, display of this information in the facets can be undesirable.

To block a subject term from displaying in the facets, add the term to the institution's block list in Admin Console >Settings > Subject Terms.

Additional Fixes and Improvements

1. Addressed the 500 Error issue with the Pages tab in the Admin Console (in both Preview and Production) that was preventing customers from accessing that page.
2. Addressed an error appearing in the Open URL metadata value generated from Detail page > ILL Request link.

December 15, 2021

Below are some details for features in the current release as well as various fixes and improvement. As always, your participation in the Idea Exchange and the NERS voting process for 2021 helped shape this release. The IGELU and ELUNA NERS process guaranteed delivery this year.

Enhancements:

- **The New Summon Experience: User Interface (UI) Improvements**
 - New position for evaluation labels – Peer-Reviewed, Open Access, Original Research, and page counts.
 - New RTA presentation.
 - New facet handling – include/exclude, sort, display, numbering and style, display select facets at top of filter pane.

- Date facet simplified to allow for easy limiting to 1, 3, 5, or 10 years with an option to search by custom date.
 - The **Add results beyond your library's collection** option moved to Refine Your Search options.
-

Note

- No configuration is needed for the new UI to appear in Production; all existing configurations (such as which facets appear and in what order) should carry over to the new experience. For a brief video overview, see [The New Summon Experience](#).
 - For any feedback or requests for improvements we received from the preview environment that hasn't been implemented in this release, we are planning on including them in the February 2022 release. We will provide more details as part of the 2022 roadmap.
-

- **Display All Links –**



NERS Enhancement and



Idea Exchange

- Ability to display all available links for full text content.
- Institutions can determine how many links they would like to display.

For configuration information, see the **Maximum Full Text Link Options** field in [Summon: Administration Console: Settings - Search Results](#).

- **Direct access to PDFs via Quicklinks**

- Links to the PDF or HTML full text directly from the results list.
- Created centrally and do not use the link resolver.
- If available, Summon presents Quicklinks first, and then relies on current linking priority if Quicklinks are not available.
- Works with selected providers. For a complete list, see [Quicklinks Provider List](#).

For more information and how to configure this functionality, see [Quicklinks in Summon](#).

- **Enhanced Did You Mean? –**



NERS Enhancement and



Idea Exchange

- Automatic search based on corrected term (current implementation searches on original query and user must use a secondary link to search the corrected term).

- Ability to execute original search via secondary link.

- **New Identifier Fields with exact match added to Advanced Search –**



NERS Enhancement and



Idea Exchange

- Individual fields available on the Advanced Search page has been expanded and include the following: Call Number, ISBN, ISSN, CODEN, Dewey, DOI, OCLC Number, Patent Number, EAN, EBSCOAN, ERIC, ISMN, LCC, NAICS, ORCID, PCID, PMID, PQID, PQPubID, SSID, UPC, DUNS, and SICL.
- Due to the number of fields now available, the **Search All** option has been removed; patrons can still search all fields by selecting them individually, but the response may be slower due to the nature of the search.

To enable these fields:

1. Switch the **Custom Search Fields Enabled** field to **Custom** under **Settings > Advanced Search** in the Summon Admin Console.
2. Select **Options** to expand the list of available fields.
3. Drag a tile from disabled to enabled to add it to your advanced search page or the reverse to remove it.
4. Click **Save** at the bottom of the page. Your changes should be visible in Preview within 5 minutes.

Note

An update to Call Number to support this improvement requires a search index update to make this visible, in either production or preview; as such, if you activate the Call Number search prior to December 17 (the first expected search index update after the release), you may not see any results; after December 17 it should perform as expected.

- **Improved Database Recommender Management Tools**

- Batch processing now available for Database Recommender changes.
- Download a CSV of your current configurations, edit the file via a spreadsheet program and upload your changes.
- Institutions can activate or deactivate databases for inclusion in Database Recommender and add or remove tags.
- **New:** Institutions can assign priority to listed databases; if multiple databases could be recommended, the top two prioritized databases will be displayed; if no priority exists, recommendations will be made using the current criteria.

To start using this improved tool:

1. Find this tool under **Settings > Recommender > Databases** in the Summon Admin Console.
2. Select **Show CSV import / export options** to access the tool and for further instructions.

Additional Fixes and Improvements:

- Summon remote authentication banner now supports the OpenAthens Redirector.

HTTPS Support:

In the past, we've given sites the option to force a redirect to HTTPS for all non-secure (HTTP) links; in order to better secure our shared environment, as part of the December release, we will require all Summon sites use HTTPS for more secure connections.

Beginning with this release all Summon URLs will be delivered via HTTPS; any existing links or widgets using HTTP will be automatically be redirected to an HTTPS connection.

This does not affect Summon API users, only the Summon User Interface.

August 4, 2021

Below are some details for features in the current release as well as various fixes and improvement. As always, your participation in the Idea Exchange and the NERS voting process for 2020 helped shape this release.

Enhancements:

- **Better Tag Matching for “Best Bets”** –



NERS Enhancement and



Idea Exchange

- Now Best Bets will show up when tag keywords are present in search, not just when there's an exact match.
 - Example matches:
 - “Job Search” now matches a “Job” tag
 - “Search for a job in my area” now matches a “job search” tag
 - Use case not currently covered: partial keyword match.
 - “Looking for a job in my area” would not match “job search”
 - No additional configuration for this feature is required beyond the standard configuration for Topic Explorer.
- **Sierra via Summon**
 - The following functionality is currently available to the Early Adopter group:
 - Login using CAS.
 - View availability and perform requests from the results page.
 - View library account information, including loans, requests, fines and fees.
 - This functionality will be available in the second half of 2022, after the Early Adopter's review.

Recent Improvements:

- **Separate Print from eBooks when Searching –**



NERS Enhancement and



Idea Exchange

- For Summon over Alma environments, resolved issue with the feature reverting to off.
- Improved process for including electronic materials in faceted results.
- Implemented toggle between facets to prevent use in combination.
 - To achieve an include or exclude of both formats, use the Book/eBook facet value under Content Type.
- Remaining outstanding bug: Clear All Facets does not clear these facets.

Additional Fixes and Improvements:

The following fixes have been resolved or completed:

- Advanced search for DOI causes API parser error.
- Summon usage statistics are not accessible.
- Zero Result searches returns error.
- Chat images are not automatically resized.
- Translations do not display in Summon Preview.
- HTML returned in permalinks for OpenAthens proxy.
- Date facet update to correctly handle time zone differences.

The following improvements have been completed:

- Add proxy when vendor = redirector.
- Support Summon WeChat interoperability.
- Removal of RefWorks Lite links options for non-RefWorks sites (if your RefWorks login should be appearing but is not, please contact support).

May 12, 2021

Below are some details for features in the current release. All of these ideas originated on the Idea Exchange and were the top votes for the NERS process for 2021. Your participation in the IGELU and ELUNA NERS process guaranteed these would be delivered this year.

Enhancements

- **Separate Print from eBooks when Searching –**



NERS Enhancement and



Idea Exchange

- Previously Summon only had a combined Book/Ebook content type facet value; now institutions can also add a facet value for just physical books and one for ebooks
 - Patrons can include or exclude search results using this value
 - This is configurable by institution; activation is a two-step process
 - To prepare your instance of Summon you must first turn on “Physical Books – Backend Processing; you will find this in the Summon Admin Console under Settings > Refine Your Search
 - At the bottom of the Refine Your Search configurations you will find the setting “Physical Books – Backend Processing”
 - Set Physical Books – Backend Processing to On
 - Then click Save Settings
 - The backend process is part of the twice weekly CDI search index update process
 - An index update will to be completed before the facet is ready
 - If you turn on the facets prior to the process being completed, they will likely show no results for those facets
 - Once the backend processing is complete, you will need to turn these facets on in the Summon Admin Console under Settings > Refine Your Search
 - At the bottom of Refine Your Search configurations, you will find Physical Books Filter Enabled and eBooks Filter Enabled set to off by default
 - For Print click on the Default button for “Physical Books Filter Enabled” to change it to Custom and set the value to On
 - For electronic books click on the Default button for “eBooks Filter Enabled” to change it to Custom and set the value to On
 - Then click Save Settings
 - This feature should appear in your instance of Summon within 5 minutes
 - Because this feature requires a search index update in production, you will not be able to view this during the preview period; after you’ve run the backend processing in production once the release is live you can then view the facet in the preview environment prior to activating in production
 - The addition and configuration of these facets does not impact the Book/Ebook facet; it will still be available and should perform as before
- **Improvements on Topic Source Display**
 - The source label for the encyclopedia entry in Topic Explorer should now better reflect the source found when the user clicks on “Read More”

- No additional configuration for this feature is required beyond the standard configuration for Topic Explorer
- **Apply EZProxy to DOI in Preview Pane –**



NERS Enhancement and



Idea Exchange

- Now you can apply your proxy settings to the DOI link in the preview pane in Summon search results
- You'll find the controls to apply your proxy to the DOI link in the Summon Admin Console under Settings > Search Results at the bottom of the controls
 - Switch Proxy DOI Links Enabled to "Custom" and "On"
 - Click Save Settings and the change should be applied in approximately 5 minutes
 - Your proxy settings used on your site should be applied to the DOI link

February 3, 2021

While the majority of the February 2021 release is related to performance and internal tools updates, users will also now have access to the updated APA Citation Style (7th Edition) as a citation option.

- **Update APA Citation Style to current edition (7th Edition)**
 - If you have the APA citation style already active in your Summon User Interface, the update to the new citation style will be automatic; 7th edition will replace the 6th edition.
 - If you do not have the APA citation format active, you can change this in the Summon Admin Console under **Settings > Citation Formats**; simply drag the **APA American Psychological Assoc.** tile from the disabled column on the right to the enabled column on the left and click the **save** button at the bottom of the page.
- **Availability of APA Citation Style (6th Edition)**
 - In the April maintenance release, per customer request, we added back the option for APA Citation Style (6th Edition) so institutions can now choose between 6th Edition, 7th Edition, or displaying both.
 - Each style's default text now includes edition number (previously this was labeled only as **APA Citation Style**).
- **Summon over Alma Course Reserve Link**
 - Some links were resulting in searches with incorrect mapping; we have resolved this issue.

December 16, 2020

Below are some details for features in the current release. All of these ideas originated on the Idea Exchange and were the top votes for the NERS process for 2020. Your participation in the IGELU and ELUNA NERS process guaranteed these would be delivered this year.

Enhancements

- **Clarify Author and Editor in Results and Citations –**



NERS Enhancement and



[Idea Exchange](#)

- In Summon search results, editors for a publication can now be displayed underneath the "by" line for authors
- Editors can also be included in citations, where appropriate.

Note

The visibility of the Editor information is dependent upon the metadata available in CDI. As an ongoing process, we will add this information to the records as it is made available by the provider.

- To enable this feature, set the new **Display Editor** field to **On** in the Summon Admin Console under **Settings > Search Results**. After clicking **Save Settings**, this feature should appear in your instance of Summon within 5 minutes.
- For a short overview of this feature, see [Summon Feature Review - Clarify Author and Editor in Results and Citations](#).
- For API users, the following fields are related to Author/Editor:
 - Author (text field): both searchable and displayable
 - Author_xml (xml field): displaying only
 - Editor (text field): both searchable and displayable
 - Editor_xml (xml field): displaying only
 - CorporateAuthor (text field): both searchable and displayable
 - AuthorCombined (text field - combines Author and CorporateAuthor, but not Editor): both searchable and displayable (as Author and/or
 - CorporateAuthor) => this is the field used when a user chooses "Author" from Summon's advanced search interface

- **Database A to Z List Integration –**



NERS Enhancement and



[Idea Exchange](#)

- You can now turn on a Springshare A–Z list Database Finder widget in the right-hand panel.
- Typing a term in this box will generate an autocomplete list of possible databases, or the user can hit Enter or click the search icon to have the results displayed in the right-hand column.

- To activate this functionality, the **A-Z Database Settings** section has been added to the new **Recommender > Springshare** page in the Summon Admin Console. For information on how to configure the A–Z list Database Finder widget, see [A-Z Database Settings](#).
- For a short overview of the feature, see [Summon Feature Review - Database A-Z within Summon](#).

- **Harvesting Best Bets from LibAnswer FAQs –**



NERS Enhancement and



[Idea Exchange](#)

- Now you can import your FAQs from Springshare’s LibAnswer FAQs for use as Best Bets in Summon.
- Importing your FAQs will create a Best Bet instance for each FAQ, including tags for each Best Bet.
- To activate this functionality, the **LibAnswers Settings** section has been added to the new **Recommender > Springshare** page in the Summon Admin Console. For information on how to harvest FAQs from Springshare, see [LibAnswers Settings](#).
- For a short overview of the feature, see [Summon Feature Review - Best Bets to Harvest LibAnswers FAQs](#).

- **Additional Improvements and Fixes**

- We improved the positioning of the **Save Settings** and **Reset Form** buttons in the Admin Console; previously, they were displayed at the bottom of the page, where they were not visible without scrolling; these buttons are now displayed directly beneath the settings to which they apply.
- Popular Searches in Summon Analytics now includes a drop-down menu for displaying Popular Searches by month.

August 5, 2020

Below are some details for features in the current release. All of these ideas originated on the Idea Exchange and were the top votes for the NERS process for 2020. Your participation in the IGELU and ELUNA NERS processes guaranteed that these features would be delivered this year. More NERS enhancements are coming in November!

Enhancements

- **Section Number on Course Reserves Page –**



NERS Enhancement and



[Idea Exchange](#)

- For Summon over Alma customers, you can now display the section number along with the Course ID on the Course Reserves page.

- **Consistent Links Back to Results –**



NERS Enhancement and



[Idea Exchange](#)

- Now links from various Summon pages (such as the Saved Items Folder and Advanced Search) have consistent labels and placement to improve the overall user experience.

• **Improved Peer Review Labeling** –



NERS Enhancement and



[Idea Exchange](#)

- You can add a Peer Review icon in the same location as the Open Access icon for improved visibility.
- In the Admin Console under **Settings > Search Results**, you will find the option to turn the icon on or off at the bottom of the list of options labeled **Peer Review Indicator**.

• **Display Book and Ebook Publication details** –



NERS Enhancement and



[Idea Exchange](#)

- Brief records in results for books and ebooks will now display Series Title, Edition, and Year.

You can also learn more about these features by reviewing the most recent Summon Update and Q&A session, available for you to view as either a [YouTube](#) video or [PDF](#).

May 13, 2020

Below you will find highlights of user-facing improvements and bug fixes. You can also learn more about these features by reviewing last week's Summon Quarterly Update and Q&A sessions.

Enhancements

- **Linked Data:** Catalog Detail Page layout update to enhance data on page and create optimized site map for ingestion by major search engines.
 - Modified layout and design of call to action buttons, such as request, hold and share social media and to improve navigation beyond the detail page.
 - Created structure in page that allows for mapping of Summon XML to the JSON LD schema, pages are now easier for search engines to crawl for metadata.
 - Next step will be to create admin tools for generating specific site map pages by institution.

- **WhatsApp Integration:** Provides a new chat service integration for you to leverage. For more information, see [Summon: Administration Console: Chat Widgets](#).
 - Add your WhatsApp number and configuration under Settings > Chat in the Summon Admin Console.
 - Chats will be directed to the smart phone number entered in the Admin Console; to change who the chats are routed to, you can update the number in the Admin Console and the change should take effect in five minutes or less.
-

Note

Chat functionality is managed by the WhatsApp application; features such as chat log or history are provided by WhatsApp.

- **New Records facet:** limits results to records added to the index in the last 7, 30 or 90 days.
 - “New Records” label can be customized under “Translations” in the Summon Admin Console.
 - The facet can be enabled or disabled or placed in a different display order with other facets by going to Settings > Facets in the Admin Console.
 - This was added as part of the March maintenance release.
-

Note

Currently, some existing catalog records may show as “new” in this facet; this is because an existing record has merged with a record that is new to the index, making the entire record appear new; we are working on revising the logic to address this.

February 5, 2020

Below you will find highlights of user-facing improvements and bug fixes. You can review existing functionality for Summon now on CDI and preview new features in the Summon Release Preview Environment as of January 23. This applies to Summon customers, Summon over Alma customers, and customers of the Summon API.

CDI Improvements

You can now test out Summon using the Ex Libris Central Discovery Index. Overall, your instance of Summon should remain the same as it was on the Summon index; there should be no changes to your user interface, API connections or backend management.

Below are some performance improvements, system enhancements, and index changes that you will benefit from immediately with no need to configure anything in your instance of Summon:

- Improved performance and an upgrade to SOLR 7.
- Match & Merge improvements
 - Added newsletters to merge process: Reduces the 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.

- Relaxed language matching: resolved discrepancy between LanguageDetected and sys_language.
- Standardized quotation marks: Ensure different formats (" vs “ vs ”) don't prevent merging.
- Better handling of synonyms: variants such as Color vs. Colour.
- The ability to search for authors or co-authors by ORCID.
- New Sort Options:
 - By author (Ascending)
 - By title

New Enhancements

In addition to performance and system improvements, there are some new features available with CDI as well. Check them out in the preview environment now, and remember you'll will need to activate them in your production environment after the release goes live if you want to offer them to your patrons.

Enhancements include:

- Author/creator facet: Go to Settings > Facets and move the Author Facet to the Enabled column.
- Collections / Database facet: Go to Settings > Facets and move the Database Facet to the Enabled column.

And a variety of fixes and improvements for specific customer needs.

November 6, 2019

Below are some details for features in the current release, which were highlighted in our most recent Summon Update and Q&A webinar ([YouTube video](#) or [PDF file](#)).

Enhancements

- **Video Improvements**
 - Addition of more video thumbnails via Syndetics and publisher content
 - Addition of play icon that takes you directly to the video content when available
- **Topics Explorer Enhancements**
 - Improved process for updating Wikipedia content to allow for more frequent updates
- **Unpaywall:**
 - Addition of links directly to PDFs or full text from Unpaywall, where appropriate
 - The default label for these links is "PDF"; this can be changed on the Translations page in the Summon Admin Console
 - The functionality can be turned on or off; you can find this under Settings > Search Results, labeled "Display Unpaywall PDFs."
 - Currently the Unpaywall link is not linked to the Open Access indicator or the Full Text or Open Access facets; we will continue to improve this functionality in 2020

- **Linked data:** phase 1 of site map for better placement of links in third party search engine results, such as Google
 - Enrichment of data for use in site maps
 - Site maps for use with search engine crawlers should be available in Q1 of 2020
 - **Uniform Titles:** the uniform title field can now be part of the default search for Summon
 - We will follow up in Q1 2020 with process for updating field mapping
 - **Advanced Search Improvement:** added Match All, Match Exact, Match Any to advanced search form
 - Options will appear under the search box when either Title or Publication Title is selected
 - **Match All**, labeled “all words anywhere,” will return only results that contain all words in your search
 - **Match Any**, labeled “any of these words,” will return only results that contain any of the words in your search
 - **Match Exact**, labeled “Exact Match,” will return results that contain an exact match for the phrase included
-

August 7, 2019

Below you will find highlights of user-facing improvements and bug fixes for this release.

Enhancements

- **Display of Public Notes in Summon (NERS)**
 - You can now display any public notes or location notes as part of the results in Summon.
 - Public notes and location notes can be individually turned on or off.
 - You will find the option to turn each on and off in the Summon Admin Console, under Settings: Search Results.
 - You will find documentation about this feature [here](#).
 - **Improved Facet Controls (NERS)**
 - You can now set the order of facet display and whether the facet is expanded or collapsed by default; you will find these settings under Settings: Facets in the Summon Admin Console.
 - We added an icon by facet headings to indicate if the facet is expanded or collapsed.
 - You can also set the background color for the facet pane using hexadecimal color codes; you will find this setting with your other custom colors under Settings: Summon 2.0 Customization.
 - You will find documentation about this feature [here](#).
 - **Other Fixes and Improvements**
 - Use of the Open Access facet is now included in OBI reports (Idea Exchange).
 - Addressed issues affecting links with diacritics encoding.
 - Improved logging and error reporting for sending of the Content Ingestion Report.
-

May 15, 2019

Below you will find highlights of user-facing improvements and bug fixes for this release.

Enhancements

- **Glanceability**
 - Allows your patrons to identify whether a specific resource is an original research article or analysis and will also include the length of the resource if available; type of resource is identified by reviewing subject terms, titles, and subtitles for the journal article content type.
 - Can be turned on or off in the Summon Admin Console, under **Settings > Search Results** using the control labeled **Research Article Identifier**.
 - Find documentation about Glanceability [here](#) and how to configure it [here](#).
- **Related Items**
 - Provides your patrons the ability to gain easy access to related Book Reviews and Chapters in the right-hand pane, just by clicking a link in the search results.
 - Turn the feature on or off in the Summon Admin Console, under **Settings > Search Results** using the control labeled **Related Items**.
 - Find documentation about this Contextual Relationships feature [here](#) and how to configure it [here](#).
- **Other Fixes and Improvements**
 - Addressed issue with "Search" tab from "Cites" or "Cited by" that prevented users from returning to original results after applying filters.
 - Fixed issue with availability message displaying **Full Text Online** when it should be **Check Availability** for some print materials.
 - Addressed issue with Gale Virtual Reference Library entries in Topic explorer where the **Read more** link leads to a 404 error.

February 6, 2019

The following enhancements will be available in our preview environment from January 23 to February 5.

Enhancements

- **Citation Trail**
 - Enables patrons to view a list of cited and cited by records for records returned in search results.
 - Allows users to follow the trails of each citation for further exploration.

For more information, see [Summon: Citation Trails](#).

- **Configuration of Topic Sources**
 - Configure, turn on, and prioritize topic sources for the encyclopedia entry for Topic Explorer via the admin console

- Current sources for topics include Credo Reference, Encyclopedia Britannica, Gale Virtual Reference Library, JapanKnowledge, Wikipedia and World Book.

For more information, see [Summon: Summon Topics](#).

November 7, 2018

For more details on the enhancements described below, you may want to review our release overview ([PDF](#)) or our recorded release preview ([YouTube](#)).

Enhancements

- **Enhanced Autocomplete**

- Suggested autocomplete entries will now make recommendations first based on searches from your institution, and then on searches in Summon overall.
- Autocomplete will also include Best Bets, Database Recommender and Topics as suggestions; display will only appear if you have these features activated in your instance of Summon.
- This is opt-in; if you do not turn this on, your site will continue to use the previous autocomplete.
- Documentation on how Enhanced Autocomplete works can be found [here](#).
- Documentation on how to configure this functionality can be found [here](#).

- **Microsoft OneDrive Support for Saved Searches**

- For Saved Searches, users can save searches during a single session, or they can log into Google Drive or now Microsoft OneDrive.
- This is configurable; you can offer your users either option or both for saving their data.
- Documentation for Saving Searches can be found [here](#).
- Documentation for enabling Saved Searches can be found [here](#).

- **Course Reserves View for Summon over Alma: Browsing and Search Improvements**

- Summon over Alma customers can now turn on a Course Reserves tab in the Summon User Interface.
- Users can browse a list of all courses and sort by Course ID, Description or Instructor.
- Users can also limit the list by searching on course name, description or instructor.
- In order to activate this functionality, you will need to create a key for the Alma Courses API and enter that into the Summon Administration Console; detailed instructions on how to configure this can be found [here](#).
- Documentation on using the Course Reserves View can be found [here](#).

- **Improved DOI Support**

- DOIs in the Summon index are now case insensitive, which should result in increased frequency of matches.
-

September 5, 2018

This Summon® maintenance release also includes some improvements for our customers using Summon and Alma. Because this is a maintenance release, there will not be a preview window specifically for this release. Below you will find highlights of user-facing improvements and bug fixes.

Enhancements

- Course Reserves now have Searchable IDs in Summon
 - Matching results are now returned when a searchable ID is input as a search term
 - Remove 100 filter limit in Course Reserves facet
 - By default, filters return a maximum of 100 facet values; for course reserves, we want to expose all values
 - Now, all values for Course Instructor and Course Name and Number will display, with no limit
 - Improved access to API key for Summon over Alma customers
 - You can now find your Summon API Key on the Summon over Alma dashboard institution detail page under Summon Sites
 - The API key will also be added to the default implementation email
 - Summon over Alma services link language settings
 - This fix aligns the selected language in the Summon User Interface with the Alma My Account, Journal Search and ILL Services links in the top navigation
 - Previously this defaulted to English; now it will match the language selected in the Summon User Interface
 - Suggested Librarian address field display
 - Addressed a bug related to suggested librarians—if an address is available for a library contact, it should now be displayed in Topic Explorer
 - Permalink display issue resolved
 - Previously the Permalink icon would remain in the search results even if this feature was disabled in the Admin Console; now applying this setting in the Admin Console will be reflected in the Summon user interface
-

August 1, 2018

For more details on the enhancements described below, please review our release overview ([PDF](#)) or our recorded release preview ([YouTube](#)).

Enhancements

- Increased Frequency of Catalog Additions
 - Catalog adds will now be processed in 24 hours or less, and in many cases within the hour
 - Adds may take longer based on number of records being processed, current load on processing systems, and other factors

- Twice weekly, during search index updates, catalog adds will be paused temporarily; this will usually occur on Sundays and Wednesdays and may last up to 12 hours
- For Summon over Alma customers, adds will be processed with your daily update
- Starting Monday, you will be able to see change in the preview environment for any catalog updates containing adds that are processed during the two-week period
- Both the Production and Preview environments will be synchronized once a Search Index Update is completed
- Documentation can be found [here](#).
- Journal Ranking Boost for Relevance
 - We are testing various relevance algorithms that include a boost based on a records' journal ranking, beginning August 1, using a small percentage of production traffic
 - Journal ranking is based on the SJR Indicator, and data is provided by the SCImago Journal & Country Rank (<https://www.scimagojr.com/>)
 - We will analyze the candidates to determine the best solution
 - The best solution will replace the current algorithm for all searches in the next maintenance release
- Multilingual Search Improvements
 - The Korean Hanja-to-Hangul transliteration filter now handles cases where multiple readings are available
 - The current dictionary has been updated and now covers variations of Hanjas, such as 醫 vs 医 and 金 vs 金
 - Increased and improved English synonym list to address spelling variations such as “Paleopathology” and “Palaeopathology”
- Improved French and German Did You Mean Functionality
- Updated term dictionaries for both German and French
- Enhanced Did You Mean to provide a language boost; when French or German are selected for the user interface, suggestions in that language are given a boost (similar boosts are in place for Japanese and Chinese)
- Temporary Saved Search Folder
 - Users can now add searches to the Saved Search Folder without signing into Google Drive
 - If users want to save searches beyond their current session, they will need to log into Google
 - Documentation can be found [here](#).

Newly Indexed Content Highlights

We have recently added or updated the following commercial content packages in the Summon Index:

Collection Name	Provider
Bloomsbury Academic Books	Bloomsbury Academic

Collection Name	Provider
Bloomsbury Food Library	Bloomsbury Academic
Bloomsbury Popular Music	Bloomsbury Academic
Universalis	Encyclopaedia Universalis
Idealonline	Idealonline
JSTOR Sustainability collection	JSTOR
Asahi Shimbun Newspaper	The Asahi Shimbun Company
Bloomsbury Cultural History	Bloomsbury Academic
Encyclopedia Britannica	Encyclopedia Britannica
Turcademy ebooks	Turcademy

June 6, 2018

Enhancements and Improvements

- Opting Out of Merging Catalog Records
 - Now, the Catalog Merge Settings page under Content Ingestion allows you to specify which catalog collections are excluded from the merge.
 - Changes to this configuration will be included in the next scheduled search update.
 - This was one of the ideas proposed in the Summon Idea Exchange
 - Documentation can be found [here](#).
- Korean Hanja-Hangul transliteration improvements
 - The Hanja-to-Hangul transliteration filter now handles cases where multiple readings are available.
 - The current dictionary has been updated and now covers variations of Hanjas, such as 醫 vs 医 and 金 vs 金.
- Search within a Journal now displays for Chinese, Japanese and Korean characters
 - Search within a Journal rules for matching have been modified to accommodate title searches in Chinese,

Japanese and Korean characters

- Search within a Journal from Journal Title Link Now Configurable
 - You can now configure both the Journal Title Search widget and the Journal Title Search from the Journal Title Link can be turned on or off.
 - Documentation can be found [here](#).
 - Custom Panel Style Tag improvement
 - We addressed an issue with Custom Panels where style tags in one Custom Panel would result in that style being applied to all Custom Panels; style tags now perform as expected
 - Syndetics Cover Image Control Improvement
 - Addressed an issue in the admin console that prevented configuration changes for Syndetics/Cover Images to go into affect; turning cover images on or off should now only take a few minutes to activate once the configuration is saved
-

May 9, 2018

Enhancements

For more details on the enhancements described below, you may want to review our [release overview](#) or our [recorded release preview](#).

- Save Searches
 - Summon users can save and manage searches. Searches can be via a user's Google Drive account.
 - Users, if they choose, can log into their Google account at the time of saving a search in order to save searches.
 - This feature can be turned on or off for your institution via Summon customizer and is off by default.
 - This was one of the top voted on ideas for the Summon Idea Exchange in 2017
 - Documentation can be found [here](#).
- Advanced Search Form Customization.
 - Clients can customize the Advanced search form, including configuring the number of search fields, setting search option values, and enabling/disabling filters and filter values.
 - Documentation can be found [here](#).
 - This feature was a product of the ELUNA / IGeLU 2017 New Enhancement Request System (NERS)
- Topics Explorer Improvements
 - Increased frequency of display: previously Topic Explorer only displayed if there was a corresponding encyclopedia entry for any keyword match; now, if there is a match to a topic, Topic Explorer will display any associated content, such as Research Guides, Suggested Librarians, or Related Topics
 - Display customization: in the Summon Admin Console, you will be able to set the order of the various elements of Topic Explorer (Encyclopedia, Suggested Librarian, Research Guides and Related Topics) using a drag and drop

interface; you'll also be able to turn these elements on or off for your institution

- You'll also be able to determine which element in the right-hand column is displayed first, Custom Panes or Topic Explorer
 - Documentation can be found [here](#).
 - Search within a Journal: alternate activation via the user interface
 - Users can now constrain the Summon search box to search within a specific journal by clicking on the journal title in any search result
 - No action is required to enable this functionality
 - This idea was originally proposed via the Summon Idea Exchange
 - Addressed infinite scroll issue: switching between tabs previously would result in the page returning to the top of the results set; now your position on the page should be maintained as you navigate between browser tabs
-

February 7, 2018

Enhancements

For more details on the enhancements described below, you may want to review our [release overview](#) or our [recorded release preview](#).

- Allow library to set if electronic or print item displays first
 - Currently if you have multiple sources for a result the links are sorted with catalog items listed before non-catalog items and electronic resources before physical resources. This functionality allows you to prioritize physical resources above electronic.
 - To activate this, select "Search Results" from the Settings tab in the admin console. The very last setting in that pane is "Merged document physical priority."
 - Turn this on if you want print or physical items to take priority over electronic items
 - This feature was a product of the ELUNA / IGeLU 2017 New Enhancement Request System (NERS)
- "Add results beyond your library..." should not appear when results refined to catalog
 - When results are constrained to the library catalog, there are no results beyond your library to add, and as such, this filter does not apply.
 - Now, if a user constrains their results to only the catalog, this option will not appear; if the user clears that constraint, the option will reappear.
 - This feature was a product of the ELUNA / IGeLU 2017 NERS
- Custom Location Mapping
 - The Mapping tab in the admin console will now include a form for requesting location mapping changes
- Configurable force redirect to HTTPS
 - While your site may be HTTPS compliant, URLs from outside of your site (such as links from bookmarks, emails or typed in the browser's address bar) may be referred across HTTP rather than HTTPS
 - Activating this feature will direct the traffic over HTTPS regardless of the original URL
 - You can turn this on or off for your institution

- Java8 Upgrade
 - Our production environment will be updated to Java 8 as part of this release
 - For the most part, this upgrade should be transparent
 - The API and User Interface should not be affected by this upgrade
 - This predominantly impacts internal tools and should resolve some outstanding issues with RTA
 - While we have done extensive quality assurance in our testing environments, configurations within your connections for RTA may vary from our test environments, so please check your links.

Product Improvements and Issue Resolution

In addition to the above functionality, we have addressed the following issues:

- Resolved an issue in the Chrome browser that was causing the Detail Page to unintentionally scroll when the Saved Items dialog box is present
- Previously, emailing a result did not include location and call number (both of which are displayed in the result preview); now both are included in the email
- Addressed conditions causing certain item from a specific institution to be excluded when "Items at my Institution" filter is applied
- For Topic Explorer, addressed issues to ensure simplified Chinese is displayed when the User Interface (UI) is set to "simplified Chinese" and traditional Chinese is displayed when the UI is set to "traditional Chinese"

Newly Indexed Content Highlights

We've recently added or updated the following commercial content packages in the Summon Index:

- CAIRN
- Nomos e-Library
- Canadian Electronic Library
- IHS Jane's
- Infobase Films on Demand
- 19th Century British Pamphlets
- Preselect Media
- Westlaw UK
- Brill Books Full text
- SciELO

November 15, 2017

Enhancements

For more details on the enhancements described below, you may want to review our [release overview](#) or our [recorded release preview](#).

- Search within a Journal
 - When a user searches for a journal title, a link to constrain your search to only within that journal will appear
 - Clicking the link will limit that search and any additional searches to that journal until the user clears the limit
 - Matching requires a match of at least 3 words to the journal title or match an acronym
 - We've modified the matching to be more tolerant of capitalization and punctuation and adjusted our requirements

for matching so that more searches should surface the link more frequently

- In order for an acronym to match it must be capitalized
- You need to turn this on before it will appear in your instance of Summon; instructions on how to do so are found [here](#)
- Custom Panels in the Right-Hand Column
 - Now you can easily create and display blocks of rich HTML or custom widgets in the right-hand column on the Search Results page
 - These panels can include rich HTML or JavaScript
 - They can be set to display only when triggered by a keyword or to be persistent for all searches
 - Please test your custom JavaScript; most issues identified in the preview environment were addressed by addressing issues within the custom script
 - You need to activate this feature and create your custom panels before it will appear in your instance of Summon; instructions on how to do so are found [here](#)
- Search Form Improvements
 - On the Search Results page you can add a "New Search" button that allows users to clear a search with as single click, which includes search terms, applied filters, rights panel content and search results
 - Currently there is no way to turn the "New Search" button off; if you wish to remove this feature from your instance of Summon, under translations, change the label from "New Search" to a single space
 - Also, the New Search feature does not clear the Search within the Journal feature if it is active; we will resolve this in a future release
 - You can also clear only the search terms using the Clear icon in the search box
 - You can now add a second Search and Clear button to the Advanced Search Form so that they appear at both the top and bottom of the form
- Citation Query Improvements
 - We have improved our relevance algorithm to better handle processing a search on a complete citation
 - Better handling of punctuation and other conventions within a citation style

Additional Enhancements Available Outside the Quarterly Release

Beyond these notable items, we are also making improvements that will be included as part of the November release but may not be visible immediately upon release. This includes increased frequency of rights updates, In Index reporting in Client Center, updates to the API documentation, and Citation Query Improvements. We will include more details on these features as part of the release.

- Increased frequency of rights updates
 - As part of the November 15 release, we will be increasing the frequency of updating rights for your institution
 - If the content is already available within Summon, you can add or remove it to your instance of Summon and the change will take place within 48 hours or less
 - In most cases, if you make a change today, by end of day the next day your changes will be visible
 - Changes to your catalog records, addition of new content or changes to existing content will still be processed as part of our twice weekly Summon Index Updates
 - While this functionality will be live in the production environment starting November 15, you will not be able to see the increased frequency of updates immediately
 - In order to ensure rights are being processed properly, for approximately two weeks after the release, we will run this new process in parallel with the current twice weekly updates
 - During this time we will be reviewing and comparing the two processes to ensure everything is performing as expected
 - Once we have validated that this process is performing as expected, we will replace our current process with the new one

- We will send out notification once this switch has been made
- In Index reporting in Client Center
 - This reporting, which displays in the client center or in Intota, indicates whether a database is indexed in Summon and provides the database's coverage percentage in Summon
 - This should appear in your instance of Summon within 24-48 hours after the initial Summon November release
- Updates to the API documentation
 - We have made numerous improvements to our documentation in the Ex Libris Developer Network
 - Improvements include better and more consistent formatting, inclusion of examples, and addressing broken links
 - We've also added more details around Availability and support for creating your own Topic Explorer
 - We will follow up with links to specific changes by the end of the week

Bug Fixes

In addition to the above functionality, we have addressed the following issues:

- New Full Load Requests Improvements: Summon now allows requests for any catalog type (previously the form was limited to MARC and MARCXML) and allows for requests for Institutional Repositories
- Improved HTTPS support for creating off-campus login links
- Addressed outstanding login issues with OBI

Newly Indexed Content Highlights

We've recently added or updated the following content packages in the Summon Index:

Provider	Collection Name or Type
Data-Planet by Conquest Systems	Statistical datasets
OECD (The Organisation for Economic Co-operation and Development)	UN Working Papers
SPIE	Books, Journals & full text enrichment packages
CAIRN	Updated for new format for books & journals packages
European Mathematical Society	Books & Journals packages
Nomos e-Library	Journals & full text enrichment packages
ProQuest Statistical Insight Tables	PQ GIS package for Statistical Insight Tables
Brill	Full text enrichment

Provider	Collection Name or Type
SciELO - Scientific Electronic Library Online	New version of existing Open Access Repository
BMJ Publishing Group	Journals & full text enrichment packages

July 26, 2017

Enhancements

For more details on the enhancements described below you may wish to review our [Summon Update and Q&A webinar](#), specifically slides 21 through 41.

- Search Course Reserves: Customers with Summon and Alma can provide users the ability to search for course reserve materials
- Controlled Vocabularies Search: Subject terms are now enabled as search links, in the preview pane and on the catalog details page, enabling users to generate a new search with all elements of the subject term applied
- Expand search results to 1,000: You can configure Summon to generate 1,000 search results for your users, beyond the current 200
- English Search Improvements: Improved handling of punctuation and special characters, use of synonyms, and stemming
- Improved Faceting: New enhancements improve usability of the include and exclude functionality in the primary and more facets panes
- Improved Header, Icon and Background Color Support: You can now set custom colors for your icons and background in the header of the results page and set the right hand column background to white; note: you do need to configure these features for them to take effect
- Preview Link Hover: A preview is displayed when the user hovers over the preview icon, eliminating the requirement to click on the link to see the preview
- Permalink placement improvement: Permalinks are now both in the preview section and as an icon at the top of the result with a tool tip
- OpenAthens Support: Proxy support for OpenAthens

Beyond these notable items, we are also making accessibility improvements and enabling you to enhance results page design through better color contrast of icons and backgrounds. Refer to the [Ex Libris - Summon - July 2017 Release Overview](#) for more details and an overview of enhancements in the July release.

Bug Fixes

In addition to the enhancements above, we have resolved the following issues:

- Resolved many outstanding issues with Resource Recommender and Bets
 - Resolved issues preventing Community Tags from triggering a database recommendation
 - Addressed issue causing Databases to be listed out of alphabetical order in the admin console
 - Resolved issues preventing some Best Bets tags from triggering a Best Bet or causing them to appear intermittently
 - Now allows for addition of Chinese, Japanese and Korean characters as tags

- Best Bets now supports use of all common special characters
- Added bulk importing to Best Bets
- Resolved issue preventing the deletion of some Best Bets tags
- Improved Topic Explorer to resolve issues with display of unrelated topics under Related Topics
- Addressed issues causing Topics to not display in certain versions of FF and Chrome
- Fixed Reserve Link (Reserve Button); previously changing the text in translations was not reflected in the User Interface
- Add link for RefWorks to the top-level links in the UI
- Add a "back to search" label to Saved items folder
- Allow '@' sign as any character of title including the first character position
- Improved support for CJK characters in the SubjectTerms field
- Apply Accessibility to bX Recommender feature
- Corrected an issue that prevented the first line in the citation format dropdown from being translated
- Addressed issues causing an HTTP STATUS 500 error in the FireFox browser on iPhones

Newly Indexed Content Highlights

We have recently added or updated the following content packages in the Summon Index:

Newly Indexed Content Highlights

Provider	Collection Name or Type
McGraw-Hill - F.A. Davis PT Collection	Physical therapy resources
McGraw-Hill - HarrisonMedicina	Clinical medicine resources (Spanish)
Association for Computing Machinery (ACM)	Books
Elsevier - ClinicalKey ES guides and Techniques	Guides and Techniques currently Fistera content only (Spanish)
Chemical Society of Japan	Journals
SOLIS	Updated for new format (Dublin Core) of research projects from the Federal Republic of Germany, Austria and Switzerland

May 3, 2017

Enhancements

We made the following changes to improve performance and usability with Summon:

- **bX Recommender - Related Articles feature**

You can now provide usage-based scholarly article recommendations to your users via bX Recommender.

Display related articles based on usage and relevance in the right-hand column.

Details at [Summon: bX Recommender Integration](#)

- **Syndetics Unbound**

You can now easily add dynamic enrichment elements to your catalog detail page using Syndetics Unbound.

You can configure and utilize any of the available Syndetics enrichments with Summon. Available elements for enrichment include Title Recommendations, Author Information, Look Inside the Book, Series Information, Professional Reviews, Reader Reviews, Tags, Book Profiles, Awards and more.

This service requires an additional license fee beyond the standard Syndetics Summon subscription, but the license can also be used to power Syndetics Unbound in your traditional OPAC or other supported service.

Details in the Syndetics section of Summon [Admin Console Settings](#) article.

- **Open Access Identification and Filter (v1)**

You can now choose to identify and filter Open Access content in the User Interface with a new [Open Access indicator/icon and Open Access filter](#).

Open Access content will be marked with an Open Access icon.

Users can limit results to only Open Access content via a facet/filter.

Filtering by Open Access is also available as an option on the Advanced Search form.

There are currently over 200 million items in the Summon index that are identified as Open Access. We will be continuously updating this content on an ongoing basis based on feedback from the customer community and as we cooperate with more providers to properly identify open access content within their collections.

- **Resource Recommender Improvements**

Searching on a database name should now return the database as a [recommendation](#), regardless of capitalization or spacing.

Fixed issues related to capitalization and alphabetical ordering of database names in Resource Recommender.

- **Best Bets Improvements**

[Best Bets](#) bulk imports now allows for importing of tags.

Improved handling of some punctuation and special characters (-_ &'@#) in Best Bets tags, and support for special characters ("'_.&'@#/~!\$%^()+`=}{[]:;?|\<>.*`*) in the description field.

Better error handling for adding Best Bets.

- **Summon over Alma**

Summon now supports integration with [Alma](#) for both the Summon User Interface and for Summon API customers who also subscribe to Alma.

Summon / Alma customers will have access to the same features and functionality found in Summon.

Additional Functionality Available to Summon / Alma customers:

Services page

Delivery of patron account data in Alma

Ability for users to log in to view their account information

A customizable page that shows items checked out, holds, fines, etc.

Publish catalog data

Rather than the output from Voyager of new/changed records and the batch input into Summon, Alma will “publish” new and changed records from the Alma bibliographic database to Summon

These records will be picked up by the Summon indexing programs

Rights management for e-resources

Replacement of 360 Client Center with Alma

"Client Center" functions embedded in Alma

Single activation - there is no need to activate in both Alma and Summon, just a new process

- **Discipline scoped searching**

User can now limit and pre-filter searches to specific [disciplines](#) using the [Advanced Search](#) form.

- **Additional Enhancements**

When [exporting search results and saved citations](#), you now have access to the Chicago 16th Edition (Notes & Bibliography) footnoting citation format in Summon.

Bug Fixes

Beyond the fixes and improvements listed above, we have also made the following issues:

- Translated the Help Page into German.
- Any changes made to the translations fields for citation format names will now be reflected in the UI.
- Addressed issues related to dynamically rendered views that were preventing Zotero from importing citations from Summon.
- Addressed issues that were causing the A&I Details Page to show Available in Print when there's no print or electronic access.
- Titles that were appearing in the user interface without spaces between the words now have proper spacing.
- Improved HTTPS support so that thumbnail images that were not appearing in the UI due to redirects of the URL are now displaying.
- Improved accessibility so that tabbing through elements in the user interface now highlights the menu options when expected.

Preview Environment - Now Including Access to Your Admin Console

The preview environment for the May 3 release is available through May 2. In addition, you can now access the configuration options in your Admin Console. This will allow you to try different configurations in the preview environment. Details about accessing the Preview environment [here](#).

Newly Indexed Content

We've recently added the following content to the Summon Index:

- New York Public Library: New York Public Library Digital Collections (Open Access)
 - American Psychiatric Publishing: American Psychiatric Publishing - books
 - Association for Computing Machinery (ACM): Association for Computing Machinery (ACM) (2009) - books
 - Elsevier: ClinicalKey ES guides and Techniques
 - Korea Scholar: Korea Scholar - Journals
-

February 1, 2017

Enhancements

We made the following changes to improve performance and usability with Summon:

- **Database Recommender and Best Bets Improvements**

Improved how both are triggered for inclusion at the top of the results set.

Resolved issues that were preventing database recommender from making recommendations when a user's query matched certain tags associated with a database.

Addressed issues preventing Best Bets from being recommended despite matching tags, particularly when automated query expansion is applied to a search.

- **Topic Explorer Improvements**

Ensured the Suggested Librarian in the topic pane, if present, is drawn from the first displayed libguide, when available.

Reinstated the Recommended Research Guide heading in the Topic Explorer pane; this heading was missing from this section after our latest release.

Cleaned Wikipedia articles to remove HTML from within the entries.

Bug Fixes

Beyond the fixes and improvements listed above, we have also made the following issues:

- The Export to Citace.com from within the Save Items folder did not export any citation at Citace.com if you were not logged in to Citace.com prior to running the Export To function.
- For the Customizer in the Admin Console, the system was making numerous calls to the server to complete a task, slowing down responsiveness and increasing the potential number of timeouts that could occur: we reduced the numbers of calls to the server the customizer has to make to complete actions, which should result in better performance and show some improvement in availability.
- Logos were disappearing after authenticating via authentication banner: some institutions' logos would disappear after authenticating via a proxy.
- SpringShare V2 Chat Widget was not appearing: a defect in the system resulted in the widget or widget availability not appearing on the top or right side of the page.

- We have refactored the menu system (used for the hamburger and phone responsive-size facets menu) to improve the overall layout on smaller devices and improve the implementation of responsive design.
- The Saved Items buttons were disappearing from A&I (Abstracting & Indexing) and detail pages in the phone view; now, from the A&I page, if you save an item, and then click the Saved Items button in the header you should see "Clear all" and "Options..." buttons in the header.
- A defect in the system would cause the Altmetrics badge to load despite Altmetrics being set to off for that site.
- A defect previously prevented the FavIcon from appearing in the browser tabs in FireFox. Now your FavIcon should appear in the tab for FireFox.
- Fixed errors that occurred that prevented emails from being sent when a user tried to email citations they have saved.
- Addressed issues preventing customers from registering new email addresses for the Content Ingestion Report within the Summon Admin Console.

Newly Indexed Content

We've recently added the following content to the Summon Index:

- CAIRN: Journals
- Oxford University Press: Oxford Very Short Introductions

December 15, 2016

Enhancements

We made the following changes to improve performance and usability with Summon 2.0:

- **Query Expansions**

We have added new Library of Congress Subject Headings to [query expansions](#) so that variants (as specified by the LCSH) are now used to expand queries. For example, a search for bionanotechnology is now expanded to include results for "nanobiotechnology" since "bionanotechnology" is a variant of "nanobiotechnology". Or science of language is now expanded to include results for linguistics since science of language is a variant of linguistics.

Please note that not all variant heading mappings from LCSH are included in the new query expansion. For example, healthcare is defined as a variant for the heading medical care in LCSH. This mapping is not included in the current query expansion data set because healthcare is a very common term, and it is probably not necessary nor desirable to expand the query for healthcare to include results for medical care.

Another new feature included in this release is the context-sensitive expansion feature. LCSH uses the notion of qualifying terms indicated in parentheses. For example, optimization (linguistics) is defined as a variant term for the heading optimality theory with the qualifying term linguistics. This means the term optimization used in the context of linguistics is a variant for the heading optimality theory. The new feature looks for both the variant term "optimization" and the qualifying term linguistics, and it does the expansion only if both terms are present in the query.

Examples:

- optimization >> no expansion
- optimization engineering >> no expansion

- optimization linguistics >> search expanded to include results for "optimality theory"
- linguistics optimization >> search expanded to include results for "optimality theory"
- **Database Recommender Improvements**

In addition to upgrading the overall [recommendation service](#) to use updated technology (now uses Java8, for example), now any database that you have rights to is available for recommendation. This means there are over 47,000 databases available for recommendation.

If you have Database Recommender activated in your instance of Summon, any databases you have rights to will be made available for recommendation by default. Customizing resources for recommendation is done via the [Recommender page in the administration console](#).

We've also updated the navigation and search functionality for databases within the admin console to make managing these resources easier.

Also we have addressed outstanding issues or defects:

- Searching on a tag or name of a Best Bet in quotation marks now returns an appropriate match
- Better handling of different accents in Spanish and Catalan
- Best Bets now appear with Query Expansion

- **Topic Explorer Relevance Improvements**

We've improved the reliability and frequency of topic matching to provide more relevant [topic recommendations](#). This includes:

- Better matching of longer queries; for example, English as a Second Language previously did not return a topic; now this search term can produce a match
- Better handling of close matches for longer phrases, to eliminate false matches; for example:
 - Previously the topic stress in the workplace would trigger a match for a search for either _____ in the workplace or stress in the _____, so that lunch in the workplace or stress in the joints would result in the matching topic stress in the workplace ; phrase matching (having 3 words in order) would trigger the match despite the disconnect
 - Now we have balanced phrase matching with better term matching, so that the above examples no longer return the topic, but the following do: stress in the workplace, stress and workplace, stress from the workplace, and stress in a workplace
- The addition of JapanKnowledge as a resource available for topic content
 - You need to have rights to this content in order to display it in the Topic Explorer, and the database is turned on as a Summon Topic by submitting a request to our Support team.

Note: all examples provided in these release notes may not be valid for your implementation of Summon. Generating a match is dependent on the source of your Topic Explorer content and how you have the service configured.

- **Analytics**

We are pleased to announce that with this release, we will be replacing our current reporting system with Oracle Business Intelligence (OBI). In addition to the launch of the initial dashboard, which includes reporting equivalent to our current set of reports, this release lays the groundwork for expanded reporting of events throughout the Summon interface.

A few things to note regarding this initial launch of OBI reporting:

- Logging of data will begin at the time of the December release
- We will run our current analytics platform, Urchin, and the new system, Oracle Business Intelligence or OBI in parallel while we validate the outputs of the new system
- Moving forward, 2016 data will be available in Urchin and 2017 will be available in OBI
- Reports will be made available after a complete month of data collection, at the beginning of February
- When the reports are live, you find the reports under the current Usage. Under that tab you'll find two sub tabs: Historical and Current. (Historical = Urchin and Current = OBI)

We will follow up in January with more details on the launch of our new analytics, including dates and support materials.

- **Relevance Improvements: Subject Term Boost**

With our December release, we are publishing a new relevance algorithm with Subject Terms having a higher influence in relevance. Previously subject terms were given similar treatment to other metadata found within the record; now subject terms are given a boost more similar to how Title or Author are treated.

This new relevance algorithm is one of six we tested with a Subject Term boost, and this candidate demonstrated the best performance for application of the boost as well as preserving performance for other types of searches, such as known item searches.

For example, the boost should only apply when query terms match specific subject terms and not when subject terms are found in other fields in the record. When searching on computational linguistics, the title foundations of Computational linguistics shouldn't be affected, since computational linguistics is not a subject term for this item. However, the title Readings in Machine Translations should get a boost since computational linguistics is a subject term in that record. Also, the title Japanese Computational Linguistics should get a boost because it also has computational linguistics as a subject term.

Note: Because relevance ranking is a complex calculation of multiple factors, actual influence of subject terms will be determined by the search parameters at the time of execution. Also, you may not be able to recreate these exact examples in your instance of Summon due to differences in the search configuration at the time of searching, including differences in content rights, configuration, and facets applied, for example.

- **Bug Fixes**

Beyond the fixes and improvements listed above, we have also made the following changes to improve performance and usability with Summon 2.0:

- Addressed issues that were causing the Summon search box generated by the Summon widget to disappear
- Corrected the placement of the spinner overlay icon in Right-to-Left interfaces
- Addressed issues with text appearing out of margin in the new Summon results page preview pane
- Removed "Indian" as a language option in Advanced Search Language dropdown
- Corrected issues with the MLA Citation format

Newly Indexed Content

We've recently added the following content to the Summon Index:

- American Psychiatric Publishing: Journals
- American Psychiatric Publishing: Books
- Cambridge University Press: Cambridge Edition of the Works of Ben Johnson Online
- Exeley, Inc.: Journals
- Haksulkyoyukwon: eArticles
- Henry Stewart Talks: Journals
- Medical*Online: eBooks
- Medical*Online: Journals
- NBD Biblion: Uittrekselbank / Uittrekselbank Jeugd
- NBD Biblion: LiteRom
- Nikkei, Inc.: Nikkei Asian Review
- PierOnline (Japan): eBooks
- SUNY Geneseo: Open SUNY Textbooks
- UMN Center for Open Education: Open Textbook Library
- Verlag C. H. Beck: Books
- 1Science: oaFindr
 - Note: This resource can be added to your profile by contacting our Support team. Use the Support Portal (accessible from the More Sites drop-down menu above)

August 24, 2016

Enhancements

ProQuest released the following updates to improve performance and usability with Summon 2.0:

- Results Page Refresh

We have resolved a number of outstanding issues, have added some new functionality, improved usability and updated the overall interface on the Summon Results Page. These changes are not limited to but include:

- Use of the pop-out menu (sometimes referred to as the hamburger icon) on the top right of the desktop responsive design, mirroring the Summon interface for [smartphones and tablets](#); this also now includes a link to the [Search Widget Builder](#)
- [Facet pane](#) improvements easier include and exclude, ability to search/filter long facet lists, addressed issues with location of Apply and Cancel
- New [date picker](#), including suggested pre-formatted date ranges as links
- Better integration of the [Preview pane](#); now displayed underneath each result, allowing for [Topic Explorer](#) or other content to persist in the right column and resolving interactivity issues
- WCAG (Level AA target) / Section 508 Accessibility Review which will include an update of our compliance checklist
 - Summon accessibility documentation available in ProQuest's [Accessibility Directory](#).
- Fixed the following bugs and customer-identified issues:
 - Changed Permalink text to Permanent Link, added a link icon, and added a success alert after copy; this link can now be found in the expanded [preview pane](#) underneath each result

- Saved items dialog link now working correctly (sometimes it required two clicks, and the tooltip notification didn't work)
- Custom link and Widget Builder link aren't treated with the Custom Colors
- 'Back to Top' button is now centered and correctly behaves in its 'float' position
- Chat Widget no longer disappears when dragged all the way to the bottom of the screen
- Fixed some IE8 / possible IE9 icon issues that had to do with checkmark and facet edit button

The UI changes are a refresh of the interface based on your requests, user feedback, and improved functionality. An overview of the improvements is also available this [PDF](#), and you can also view a recording of the improvements that were covered in the August Summon Quarterly Update webinar. To view the recording, click see the August 9 entry in [Recorded Training Sessions and Special Event Presentations for 360 Services, Intota, 360 KB, Summon, and Ulrich s.](#)

Known Issues or Changes to the UI

To better prepare you and your users for the change, a few things we thought you should note:

- Custom scripts may not work with the new UI; we tested many of the common customizations to determine if they might conflict with the UI, and we found most should work; however, to be safe, you should turn off custom scripts and then test them as you turn them back on.
- The default colors for Summon will change slightly; the gray is a little darker to show better contrast with icons.
 - For information on default colors see **Summon 2.0 Customization** section of [Administration Console: Settings](#).
- If you've implemented custom colors, please check the icon contrast with your custom colors; you may need to adjust them to a slightly lighter or darker color.
- Custom links at the top of the Summon page will appear in the pop-out menu in the upper right hand corner of the browser; if you have implemented a custom link, you should check the link's font and style to ensure they are correct; you may need to apply your custom style to these custom links.
- We have addressed issues with longer links not working in Internet Explorer; a side effect of this is that when a user hovers over a link, the link will not display in the bottom left-hand corner of the browser.
- Topic Explorer Improvements
 - Added many missing discipline- and subject-term-level topics to [Topic Explorer](#)
 - Identified approximately 100 topics for inclusion by comparing current topics to HILCC, Library of Congress Subject Headings, FAST dataset and ProQuest's controlled vocabularies; the list of new topics is available in this [spreadsheet](#)
 - Increased number of matches across all topic resources, including more matches for existing content sources and additional matches for Related Topics
 - Increased likelihood of appropriate matching by mapping common terms to topics (such as ensuring accountant would trigger the topic Accountancy)
 - Revised process for adding new sources for Topic Explorer to allow for easier addition of new sources for content
 - Added the first additional [resource](#) (World Book) for use in Topic Explorer; more to follow

Bug Fixes

We have made the following changes to improve performance and usability with Summon 2.0:

- Resolved an issue in Internet Explorer with encoded URLs that would result in a Page Not Found error (HTTP 404 error)
- Revised response to HAN Proxy to address issues with Real-Time Authorization using HAN
- Fixed issue with browser back button not returning to Search Results Page From Catalog Details Page
- Resolved issue to ensure when full-text link is available, it should take precedence over print
- Issues with support for having multiple search box widgets on a single page have been resolved
- Removed extra period from MLA 8th Edition citations

Relevance

For this release we focused on improvements using Subject Terms and Controlled Vocabularies to improve relevance. We reviewed the application of LCSH, MeSH and Sears Subject Headings to determine their influence on relevance. Our investigations determined that the current algorithm uses subject terms and controlled vocabularies to influence relevance well. Summon queries already benefit from the matching to and influence of Subject Terms and Controlled Vocabularies and we will not be promoting any updates to the algorithm for this release.

We also identified potential enhancements to provide better visibility and controls for using Subject Terms and Controlled Vocabularies. For the December release, specific enhancements we are reviewing include improved faceting tools, subject term augmentation, and query expansion improvements.

Newly Indexed Content

We've recently added the following content to the Summon Index:

- McGraw-Hill: Access Science
- McGraw-Hill: Murtagh Collection
- OpenStax: eBooks
- SAGE: Knowledge Business Cases
- ProQuest: History Vault: Women at Work During World War II: Rosie the Riveter and the Women s Army Corps
- ProQuest: History Vault: Confidential U.S. State Department Central Files, Africa and the Middle East, 1960-1969
- ProQuest: History Vault: FBI Confidential Files and Radical Politics in the U.S., 1945-1972
- Parliamentary Library, Australia: Parliamentary Journal Articles
- Parliamentary Library, Australia: Parliamentary Bills Digest
- Parliamentary Library, Australia: Parliamentary Biographies
- Parliamentary Library, Australia: Parliamentary Members
- Parliamentary Library, Australia: Parliamentary Political Party Documents
- Parliamentary Library, Australia: Parliamentary Previous Parliaments
- Parliamentary Library, Australia: Parliamentary Press Clippings
- Parliamentary Library, Australia: Parliamentary Press Releases
- Parliamentary Library, Australia: Parliamentary Library Publications, Seminars, and Lectures
- Parliamentary Library, Australia: Parliamentary Senators

June 22, 2016

Enhancements

ProQuest released the following updates to Summon 2.0:

- Enhanced Search Widget Builder
 - You can now build an [embedded search box or widget](#) using any of the facet and filter options available via the Summon 2.0 UI.
 - Simply replace *MyDomain* with your library name in the URL <http://MyDomain.summon.serialssolutions.com/widgets/>, then follow the instructions.
 - If you have already created search widgets or boxes using the existing tool, there is no need to recreate your search widgets or boxes unless you want to modify the criteria you originally used in creating it.
- Chat Widget Support Improvements
 - Summon now supports integration with the **QuestionPoint** chat widget; you can activate your widget using the **Enable QuestionPoint Qwidget** section of instructions in our [Chat Widgets](#) article.
 - We also improved integration with LibraryH3lp, allowing for the use of a custom widget created in LibraryH3lp rather than the default design, and changed the LibraryH3lp chat widget prefix from http to https.
- Citation Improvements
 - Summon now supports citations based on the MLA 8th Edition and AGPS Press - Style Manual, 6th Edition.
 - [Citation exporting](#) now supports citace.com
- API Enhancements
 - Faceting by Content Provider
 - Ability to limit results to a specific content provider
 - Initial release is API only, to support specific needs via the API
- Faceting by Database
 - Ability to limit results to a specific content provider
 - Initial release is API only, to support specific needs via the API

Bug Fixes

We have made the following changes to improve performance and usability with Summon 2.0:

- Infinite scroll "More results failed to load" error has been resolved
 - This bug had an impact on a variety of components of Summon and could manifest itself and has been reported in a variety of ways, including:
 - Newspaper facet with date limiter showing only 10 results regardless of actual number.
 - Intermittent problems retrieving more than 10 items.
 - Image Spotlighting triggering "More results failed to load" error.
 - Content type filtering not working correctly with rollups filters.
 - Filtering by "Newspaper Articles" on Date-Limited Searches Leads to Inaccurate Results Count Displayed.

- Translation improvements
 - We continue to address outstanding translation issues as we work on improving the overall Summon experience, including resolving the following items:
 - Feedback form email is not translatable.
 - Translate About, Help, and Feedback Form Pages.
 - The button "Find Journal Article" and parts of the Mobile UI are missing Swedish Translations, and languages need to be localized in the drop down.
 - Fields controlling the labels for various citation services in the Saved Items folder page are missing or the translations are broken.
 - Application Error message displays only in English.
 - Missing translation for content types in the A&I page.
 - Some UI fields are not using translations file.
 - "Enter a valid date" message in Publication Date Slider isn't translated in non-English UI.
 - Updates for Spanish and Italian translations.
- Other Bug Fixes
 - Feedback form no longer requires the user to enter an email address when your feedback form is set up for email address optional.
 - Topics: When searching on various country names, Britannica is not returning results.
 - UI issue on saved item section: overlap of RefWorks icon and link "clear all" overlapping with saved items folder icon.
 - Browser back button does not return to Search Results Page from Catalog Details Page.

Results Page UX Improvements (Phase 1 - Planning and Testing)

At [ELUNA](#), we announced we'd have initial mockups for proposed improvements to the results page user experience. Over the next few weeks we will be soliciting feedback and conducting user testing to help us finalize the changes.

For now, you can find a preview of those changes on the [Overview of Summon 2.0 User Interface Development Plans](#) page. Included in the Overview PDF is information on how to provide feedback on the proposed changes. We will keep you posted on the results!

Newly Indexed Content

We have recently added the following content to the Summon Index:

- Encyclopedia Britannica: Britannica Online Japan
- German National Library of Economics: EconStar
- Edward Elgar Publishing Ltd: Reference Books, Reference Reviews
- Endocrine Society: Endocrine Press Journals
- Gale: National Geographic Virtual Library
- Hyweb: ERIC
- McGraw-Hill: OB/GYN Collection, Neurology Collection, Pharmacotherapy Principles and Practices, Access Medicina

- ProQuest: Ebook Central
 - OhioLINK: Dissertations
 - World Bank: Open Knowledge Repository
 - Nikkei Business Publications
-

March 9, 2016

Enhancements

ProQuest released the following updates to Summon 2.0:

- Permalink improvements, addressing some outstanding requests for additional functionality
 - You now have the ability to turn on or off the [record display](#) of persistent links (*permalinks*) to the item, as well as the ability to change the colors of links.
- Translation improvements
 - The language drop down for selecting the language in the UI will now display options in the native language.
 - Czech and Catalan [help text](#) have been added and updated.
- AGLC3 and Oxford citation styles have been added as [export options](#) in the saved items folder.

Newly Indexed Content

We have recently added the following content to the Summon Index:

- BookCube
 - Cambridge University Press - UPO
 - Cio (Centre pour l' édition électronique ouverte)
 - Igaku-Shoin (Japanese)
 - McGraw-Hill Access Case Files
 - Oxford University Press - Law
 - Sage Research Methods Databases
-

January 20, 2016

Enhancements and Bug Fixes

ProQuest released the following updates to Summon 2.0:

- Addition of Altmetric to the Summon UI
 - You now have the ability to activate an Altmetric Badge within Summon. [Altmetric Badges](#) display information about an article's scholarly impact as expressed through online, social media and news mentions.
 - For content that has associated Altmetrics, this badge will appear and will link to basic reporting from Altmetric.com. This reporting is available without subscription.

- You can activate the Altmetric Badge within a Summon record and on the Summon [Item Preview](#) pane. The default setting is OFF. To learn more see the **Altmetrics** section of [Summon: Administration Console: Settings](#).
- Consortium: Change **Items at My Institution** [facet](#) behavior to include all resources
 - Previously, limiting to Items at My Institution in a consortium setting for Summon included print material but excluded electronic resources available at your specific institution.
 - We've modified the logic so that the Items at My Location Facet now displays the resources a patron has immediate access to, both print and digital.
 - When the user selects the "Items at my institution" filter, the results include both 1) the library's electronic holdings based in their Intota or Client Center profile and 2) the catalog holdings from that individual institution only, not including content from other consortium members.
- Bug Fixes
 - LC call numbers now appear in the [Item Preview](#) pane in Summon 2.0. Previously Dewey call numbers appeared, but not LC call numbers. They will now show up in the preview pane. Individual institutions can turn this on or off for their specific instance - see the **General** section of [Summon: Administration Console: Settings](#).
 - Improved ingestion of libguides for topics content; previously topic content processing added new libguides without discarding previous ones; this change should insure that the newest values will appear in the Summon [Topic](#) pane.
 - Corrected an issue with the email/export option regarding variations between the use of an abbreviation for edition and spelling it out; previously the email/export option would format the citation incorrectly if edition was spelled out.

RefWorks Replaces Flow

This week all interface labels and branding, within Summon and the Summon Administration Console, will be updated to reflect RefWorks instead of Flow. In addition, free individual access to RefWorks will be only available through the Summon interface. Read more about the [Summon-RefWorks integration](#) and the benefits it provides to your users through the Summon 2.0 interface.

- To learn more about Summon-RefWorks customization options, see [Summon: Saving Items \(Citations\)](#).

Newly Indexed Content

We have recently added the following content to the Summon Index:

- SAE International - Technical Papers
- The European Library
- Toyo Keizai - Journals
- SAGE Video
- Cognitive Sciences ePrint Archive
- Sabinet SA e-Publications

December 1, 2015

Enhancements and Bug Fixes

ProQuest released the following updates to Summon 2.0:

- Improving the [Facet Pane](#)
 - Added Exclude functionality
 - Revised the "More Facet Pane" to improve readability and usability
 - Corrected issue with truncated Facet Labels and document counts
 - Addressed bugs related to tool tips, translation codes and facet counts
- Summon-SIPX Reading List module availability: Helps instructors who find quality readings in Summon share easily with students through ProQuest SIPX s course materials solution. (*Subscription purchase required, early adopter pricing available for a limited time please contact sales@sipx.com or see [here](#) for more details. Learning Management System connection upgrades also available.*)
 - SIPX integrated into Summon's Saved Items pane as an [export option](#)
 - Configuration settings added to the Administration Console
- Add ability via the [Settings Page](#) in the Administration Console to remove RSS Feeds in the Summon UI.
- Fix bug in [Summon Search Widgets](#): Apostrophes can now be included in search terms.
- Fixed [Saved Items](#) bug: Full list of saved items are exported as expected.
- [Summon Topics](#) improvements:
 - Prevented unrelated topics from displaying in Related Topics list.
 - Improved topic retrieval from Wikipedia for searched terms to avoid inappropriate results.
 - Corrected 404 (page not found) errors when accessing Gale Virtual Reference Library via the Read More link.
- Fixed logo bug: Summon logo can now be uploaded successfully via the [Settings Page](#) in the Administration Console.

Newly Indexed Content

We have recently added the following content to the Summon Index:

- ACI - Scholarly Blogs
- The Audio Engineering Society
- Brill - Reference
- CAIRN - Books
- Cambridge University Press - Cambridge Books Online
- Cambridge University Press - Shakespeare Survey Online
- Database of Recorded American Music (DRAM)
- Edward Elgar Publishing
- GEOTAR
- HBO Kennisbank
- McGraw Hill - Access Pediatrics
- McGraw Hill - Access Physiotherapy
- McGraw Hill - Access Pharmacy
- McGraw Hill - Access Surgery

- McGraw Hill - Access Neurology
- McGraw Hill - OMMBID
- Moazine
- SAE International - Journals
- SAGE Business Researcher
- SciELO (Scientific Electronic Library) - eBooks
- Vandenhoeck & Ruprecht - eBooks

Overall System Improvements

Many of our development resources for this release have been focused on the continuation of the systems work described in our September release notes below and reviewed in our July and November quarterly roadmap review webinars (recordings available in the Support Center [here](#)).

As described in those webinars, we are working on shifting from our current datacenter configuration to a blue-green deployment configuration, as well as other fundamental changes to our systems. While this release represents furthered back-end work, the new configuration will not replace our existing system until the entire suite of work for this phase is complete.

We will continue to prioritize bugs, issues and enhancements for Summon as we work to improve the Summon platform.

September 23, 2015

Enhancements and Bug Fixes

- Improvements and bug fixes related to citations and citation formats, including the following formats:
 - Harvard
 - APA
 - MLA
- Fixed bug concerning Library Location facet not initially displaying
- Addressed issues related to simplified and traditional Chinese

Overall System Improvements

Many of our development resources for this release have been focused on the fundamental system changes reviewed in the quarterly roadmap review session (see the July 21 **Summon Update and Q&A** recording available on our [recordings](#) Support Center article). As described in that webinar, we are working on shifting from our current datacenter configuration to a blue-green deployment configuration, as well as other fundamental changes to our systems.

As a reminder, here are some of the benefits we should gain from completion of these system improvements:

- Faster deployment and system upgrades
- Zero downtime for new product releases and upgrades
- Capability for continuous integration and delivery
- Improve testability and overall quality (QA environment as close to production as possible)

- Improved process automation and management tools

This is also the first step and foundation for increasing the frequency for rights updates and content indexing.

While this release does represent some of that back-end work, this new configuration will not replace our existing system until the entire suite of work for this phase is complete. We will continue to prioritize bugs, issues and enhancements for Summon as we work to improve the Summon platform.

August 18, 2015

An update to Summon's [relevance](#) algorithm:

- Two primary improvements:
 - **Improved balance between dynamic and static rank:** Summon's relevance ranking algorithm uses two types of relevance factors: the dynamic rank and the static rank. The dynamic rank factors describe how well a given query matches each record. The static rank factors represent the importance or value of each record. One common type of relevance issues we have observed in the past involve cases where the influence of the dynamic rank is too strong, such that records with low static ranks, such as old publications and less important content types, appear among the top search results. The new algorithm has a better balance of the dynamic rank and the static rank, and it should reduce the number of such issues.
 - **Improved balance of short titles and long titles in the top results:** Previously, Summon's ranking algorithm tended to emphasize records with short titles, especially those that closely match the query string. The new algorithm reduces the influence of the field length normalization and the exact match boost, and as a result, top search results include a better mix of short and long titles that are relevant to the query.
 - There are a number of other improvements being made in the new algorithm. One noteworthy property of the new algorithm is that *short and general* topical queries (e.g., linguistics, global warming) tend to return more books, eBooks, references and journals among the top results. And *long and specific* topical queries (e.g., linguistics universal grammar, global warming Kyoto protocol) tend to return more journal articles among the top results.
-

July 22, 2015

A patch release including the following updates:

- Added a Permalink to the [Summon record display](#) to make copying the persistent bookmark easy.
 - [RSS](#) in Summon 2.0 no longer requires authentication.
 - Addressed error with widget not accepting apostrophes in search, breaking external searches.
 - Addressed conditions causing Application Error: Unexpected Search Error messages.
 - Fixed bug concerning running a new search on a detail page failing to load the results.
-

June 30, 2015

RSS Support for Summon 2.0: In digging into the RSS feed issues, it looks like the errors can be caused by a variety of combinations, including the RSS feed plugin you're using for your browser, your authentication status within your network

and your access method for your network, and the feed itself.

Basically, you need to be authenticated and using an up to date, current RSS reader. If other RSS feeds are working, then the issue probably has to do with authentication and the RSS feed configuration. If other feeds are not working, then it may be an issue with your RSS reader or plugin for your browser.

While I have had individuals contact me and say they have been able to use the RSS feeds without error, the steps involved to troubleshoot the issues I outlined above is more than should be expected by the end user.

I am working with the development team to modify the RSS feed to address any issues due to authentication. As far as any issues with a specific RSS reader or plugin, we will provide as best support for those as we can.

I will update the group when I have more to share with regards to changes to the RSS feeds.

Brent D. Cook, Director, Product Management

brent.cook@proquest.com

June 24, 2015

Enhancements

- [RSS](#) Support
 - Note: This feature is not working in the production environment as expected. We are looking into the issue and appreciate your patience; updates will be posted.
- More details in the [Database Recommender](#) list of databases in the administration console; the list of databases now includes:
 - DBID for each database
 - Provider name for each database
- Improved deduplication rules:
 - Better matching of Book/ebook titles on unique identifiers
 - Improved deduplication of dissertation content type
 - Improved Video Recording content type matching
- Improved [rollups and spotlights](#):
 - Ability to turn off Newspaper Rollups or Image Spotlighting
 - Newspaper articles in a rollup are now removed from the search results
 - Cleaned up related bugs - incorrect behavior for less than 3 results or repetition of results sets 3 or more times

Bug Fixes

- Printing search results from the browser results in a jumbled mess
- Email citation message text is required
- Application error appears when a change is made to the "results sorted by" option for some searches
- Preview Pane missing Publication Title field for Reference Content Type

- APA Citation format should include book edition information
- Citation links for saved articles mixed up
- Publication Date Facet: Issues with error checking and when entering two digit years
- Translation editor setting are not getting translated: "No results were found for this search with your current filter selections. Try clearing your filters to improve your results"
- Advanced Search:
 - User can bypass form validation by clicking Enter to submit Advanced Search
 - Advanced Search Icon not displaying in Chrome

Newly Indexed Content

We have recently added the following content to the Summon Index:

- Brill - Books
- Brill - Journals
- Hebrew Periodicals
- Boom Publishers - Books
- BookUp
- McGraw-Hill - Access Anesthesiology
- Office of Publications of the European Union

June 11, 2015

Status Update

I wanted to post an update regarding the current metadata issues with the Summon index discussed on the listserv. We have finished the initial cleanup of the metadata and are still in the process of updating the index. The majority of the work is done, however, we are taking extra care with each step, which takes extra time. Our revised ETA for completion is Thursday evening PDT, June 11.

Upcoming Quarterly Webinars

We will have our quarterly product roadmap series webinars on July 16 and July 17. As part of each webinar, I will go over what happened during the above metadata issue, what we are doing to ensure this does not recur in the future, and an update on our product roadmap.

June 4, 2015

Enhancements

- Reducing duplicates in search results: We have made improvements to reduce the number of duplications caused by the following cases:
 - Better handling of white space, punctuation and special characters

- Better subscript and superscript handling
- Better reconciliation between British and American English
- Expansion of synonyms map
- Addressed issues with stop words in other languages
- Ability to pass a language parameter in the URL; language detection will be done in the following order: URL for language parameter, browser settings, then Customizer default language setting. Details in the **Languages** section of the [Settings](#) page in the administration console.
- Improving the Catalog [Detail Page](#) with these additions:
 - Added Subject Headings
 - Added Request button
- Improving [Advanced Search](#)
 - Added a tool tip to identify the icon upon hover
 - Maintain Advanced Search data while navigating within Advanced Search
 - The list of content types under "Show Content Type" in Advanced Search are dynamically generated from only the content types available to each client.

Bug Fixes

- Display related (graphical or results):
 - Replace Font Awesome/Glyph icons with CSS/Unicode Characters
 - Color not customizable including sources outside of this library's collection
 - Off-campus login banner cuts off with long text in mobile view
 - Titles disappearing in the mobile UI
 - Libraryh3lp widget is not displaying as "online" when it is online
 - "Reserve" button displaying when document is an electronic resource
 - Facet sort order for "Sort Alphabetically" is incorrect under Chinese Languages UI
 - Some records displaying with "Physical copy - Check Availability" when they should have a "Full Text Online" label
 - [Topic Explorer](#) bugs, including issues with appropriate Credo resources appearing in topic pane, resolution of 404 errors, and corrected issues with some instances of Suggested Librarian
- Availability uilang feature now works in Summon 2.0
- Added timeout message for [Saved Items](#) inactivity
- Administration Console:
 - Chat widget location of "side" is no longer reset to "top" when user saves unrelated changes in Admin Console
 - Missing Translation - "Email sent successfully" label can now be customized
- Search related:
 - Advanced Search - Drop down list of choices is alphabetically organized in English (does not work for other languages)
 - When a user enters search terms in the advanced search screen and keeps refining their query, the subject terms no longer become nested in ways that are confusing and excessively limiting

- IE11 cannot type Traditional/Simplified Chinese words in search box by Microsoft IME
 - Catalog Detail Page related:
 - Citation Online link is fixed
-

April 16, 2015

Enhancements

- Known item search enhancements - when a user is looking for a specific item and uses a combination of fields, this improvement to relevance should ensure returning the result in the top 10 (if not the top 5) results; fields used include:
 - Title
 - Subtitle
 - Author
 - Publication Title (for Journal Article)
 - edition (for Book/eBook)
 - Publication Year
- Persistent URLs - users can now copy or bookmark links in Summon and these links will allow for long-term support of linking to the content.
- Full text priority boost - ensures full text links are offered when linking to content for which there is both full text and A&I availability. Please note that this impacts linking only, it does not impact relevance ranking.
- Inactivity timeout on [Saved Items](#) folder is now configurable.
- [Best Bets](#) improvements
 - Bulk delete Best Bets
 - Bulk insert Best Bets via a CSV file
 - Edit an existing Best Bet
- [Accessibility](#)
 - Added labels to the search landing page and main page search boxes
 - Upgraded the date picker to ensure the calendar control is accessible via the keyboard, that modal/dialogs are available via the keyboard, and that users are notified of all events and texts via screen readers
- Flow Login link is now translatable and customizable.
- Results are now numbered to help users keep track of where they are in the results set.
- New HTML-based saved items email - addresses broken links in emails, corrected issues with citations, and email address is validated upon entry to reduce errors.
- Support for [exporting](#) to EasyBib.
- Improved error messages - if a specific aspect on a page does not load, we will now provide better error messaging; this includes if the "more facets" fails to load, if there's an error loading additional results during infinite scroll, and if there are any failures during exporting, emailing or citing documents.
- API improvements - now allows for differentiation between UK and US English and France and Canadian French, which also ensures correct language is set in the OpenURL links.
- Translations - feedback forms, forms on the UI and email fields are now translatable.
- Support for LibAnswers 2.0 [Chat Widget](#)

- Support will only be for 'Button pop-out' and 'Slide' widget types
- Will address known issue of Chat appearing offline when staff is available
- Will allow for better access to built-in LibAnswers 2.0 functionality
- Support for LibAnswers 1.0 and LibraryH3lp will not be affected and will continue to be supported

Bug Fixes

- Topics: Encyclopedia Britannica "Read more" link was previously not proxied, leading to broken links
- Improved cover image styling on Details Page to ensure images don't overlap text
- Publication date is one day/month ahead of the choice
- BibTeX export has incorrect url and some missing content type labels
- Email citation feature missing full-text links when citation format is selected
- Month abbreviations in pub date slider persist in English when Welsh is selected as UI language
- Feedback form string "Type of Feedback" not getting translated
- Creating Best Bets description even if the text is less than 140 characters, upon hitting the Save button, the "description too long" error occurs
- Results from stemming appearing higher than verbatim matches
- There is no option to edit the text for "OCLC Number"

Newly Indexed Content

- Ambrose Video - video database with more than 500+ titles
- BCC Research - market research reports
- Chadwyck-Healey - content from the Annual Bibliography of English Language and Literature (ABELL) available through ProQuest
- CLEO (Centre pour l'Édition électronique ouverte)
- Gale/Cengage - Health and Wellness Resource Center
- Gale/Cengage - Infotrac Newsstand
- Gale/Cengage InContext - periodical titles, main reference titles, and additional virtual reference titles
- Gale/Cengage Literature Resource Center - main reference and periodical titles
- Georg Olms Verlag AG - includes reprints of works with new introductions, afterwords, notes or indexes
- Infobase Learning's Films on Demand
- Institution of Engineering (IET) - journal content for indexing, along with metadata and abstracts with separate PDF full text
- Springer-Verlag Book Archives

April 10, 2015

Status Update

I wanted to give you an update on the current release and search index updates.

Our New Release

We believe we have identified the issues that were causing the link problems with our new release. As I mentioned earlier today, the errors were an aftereffect of our recent system upgrades. Publishing the release to production identified discrepancies between our data centers and resulted in the links not working intermittently. We are in the process of resolving those discrepancies and will complete the release process as soon as possible.

Why is this important to you? The errors are not reflective of the quality of the release, but rather reflect the complexity of our server environment a complexity that with every system upgrade and release we are simplifying and improving. But please note, this release will still contain the improvements and fixes I covered in the webinars this week.

Timeline Moving Forward

In the short term, we have rolled back our data centers to the previous version of Summon to ensure stability and reliability while we address the issues at hand.

For the next ten days, the planned release and index update schedule is as follows (all dates PDT):

- We have initiated a Search Index Update, which should be complete and available on Sunday, April 12.
- We will resume the product release early next week. We are reviewing our release plan and current traffic patterns for usage on Summon in order to align our activities with the times of day that will reduce any potential impact to your patrons.
- The release is now scheduled to go live on Wednesday, April 15. Prior to the release, we will be confirming that we have resolved the identified issues in both our testing and staging environments.
- We will resume our regular schedule for search index updates after that, with a new index available on Friday, April 17.

Improving Communications

As was noted on the listserv, there was a delay in messages making it out to some members that exacerbated the outage on Wednesday. We are monitoring and reviewing the situation to determine the best way to resolve this moving forward. I will keep you updated on how this is progressing.

Quality of the Release

I am confident that once the release is live across all our data centers that you will be pleased with the changes you see. We have done everything we can to ensure that's the case. But, as discussed earlier today on the listserv, even the best test environment can never replicate the live environment and there is the possibility for error. We monitor our releases closely so we can react quickly if an issue does arise.

If you see something that causes concern, please continue to contact customer support first as many of you did Wednesday. Although we monitor the listserv and will respond to any issues reported there directly, the shortest path to resolution is through our customer support.

If I neglected to address anything in my email above or if there is anything else I can do to assist, please let me know.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

March 24, 2015

Status Update

I wanted to send out an update on our upcoming quarterly webinar and invite you to join us at ACRL at the end of the month if you are going to be attending.

Upcoming Quarterly Webinars

I have had a variety of individuals tell me they cannot attend the sessions as scheduled but cannot make them due to conflicts (including ACRL travel or prep work). In order to be as inclusive as possible, we have decided to shift these out a few weeks to ensure as much participation as possible. The Q&A session is only as good as the questions you pose!

As a reminder, these sessions will provide updated information on the latest developments with Summon and what's in store for the next quarter. I will highlight late 2014 and 1st quarter 2015 service improvements, hardware development, and content additions, while providing details on our Summon and 360 Link roadmap.

March 2, 2015

Status Update

Due to issues with the Search Index Update process, the Index Update scheduled for Saturday, February 28 (PST) was not completed. We believe we have confirmed the source of the issue. As a result, content and subscription rights are current as of Sunday, February 20th until we complete the next update.

The next scheduled index update is scheduled for release Wednesday evening, March 4 (PST). If there are any additional delays I will notify you as soon as possible. Updates for this new target release will include any changes made up until Sunday March 1 (PST).

We apologize for this disruption in service. As always, we encourage you to subscribe to or periodically visit the [Summon Index Update](#) support center document to receive notifications of each update.

Please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

February 19, 2015

Status Update

We successfully completed our system maintenance which should result in improved reliability and performance for the system overall through some server upgrades. If you happened to make any changes to Best Bets or to Database Recommender while we made these updates on either Wednesday or Thursday of last week, please double check your work to ensure it was not affected by the upgrade.

Following the upgrade, our kickoff of the next search index update was unavoidably delayed. The most recent update of the Summon Index was completed approximately 10 hours later than usual, on Wednesday, February 18 at 21:18 EST. The

next update was started shortly afterwards and we expect this to be completed by Saturday EST.

Finally, our next product update is scheduled for mid-March. We are again focusing on improving the end user experience in the following ways:

- Known Item Searching Improvements
- Persistent Links
- Full text boost-prefer links to full text over citations
- The ability to edit Best Bets
- Integration of exporting citations to EasyBib
- Translation improvements - adding and improving which fields are editable
- Saved Items folder changes - making the timeout configurable by institution and setting the default for 120 minutes (it was previously 20 minutes)
- Support for Springshare's LibChat 2.

There will be a variety of bug fixes and other improvements included as well. Delivery of these features will be dependent on successful completion of testing in the upcoming weeks. I will send out more details as we get closer to the release date.

Please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management

brent.cook@proquest.com

February 11, 2015

Status Update

I wanted to give you an update on the planned system maintenance for this week. We are currently on schedule to complete this work by Friday. We will start our next search index update once the work is complete and should be back to our regular schedule next week.

Please hold off on entering any changes or new entries for database recommender or best bets until end of day this Friday (Pacific Standard Time) (Saturday, 8:00 AM UTC).

As part of the maintenance, we are upgrading the systems that support our Database Recommender and Best Bets functionality. Over the next three days recommendations and best bets should continue to perform as designed, and there should be no interruption of service to your patron. However, we do ask that you not add best bets or tags to database recommender between now and Friday. If you do, there is the potential that your changes may be lost in the upgrade and you will need to re-enter your information.

Again, your patrons will continue to get database recommendations and best bets you currently have in the system.

Please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management

brent.cook@proquest.com

February 3, 2015

Status Update

Previously we had announced we would be doing system maintenance this week. Deployment and testing has taken longer than expected, so we will be rescheduling this maintenance window for next week. Because of the delay, we will have two index updates this week, which should go live on Wednesday and Friday. The week of February 9-13 there will be no search index updates.

We will conduct an update immediately after the maintenance work is completed.

I also wanted to thank everyone who made it to SummonCamp at ALA Midwinter over the weekend. It was a pleasure to get to see everyone in person. As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management

brent.cook@proquest.com

January 23, 2015

Status Update

The week of February 2 we need to do some backend system maintenance that will result in increased reliability and improved performance for Summon overall. In order to accommodate this work, we will not have our regularly scheduled search index updates that week. We will have two index updates next week, as planned, and will resume indexing immediately after the completion of the maintenance work.

We will resume our regular index update schedule the following week, February 9.

Webinars

A special thanks to Annette Bailey and Godmar Back for presenting a great webinar this week based off of their Code4Lib paper, [Hacking Summon 2.0 the Elegant Way](#). One comment after the session was This is the best ProQuest webinar that I've been to. I hope everyone in attendance thought it was valuable and if you could not make it, we've archived it in our [Recorded Training Sessions and Presentations](#) answer in the Support Center, along with my December Summon Update customer webinar.

I also wanted to remind you that our training webinars for discovery services are now posted with management sessions. Remaining January discovery service training sessions that you may find of interest are:

- Introduction to 360 MARC Updates, January 27 at 8:00 AM PST
- 360 Link: Product Update and Q&A, January 27 at 11:00 AM PST

Remember, if you or one of your colleagues want to present to other Summon users at an upcoming webinar, please email my colleague at scott.schuetze@proquest.com so we can arrange it.

ALA Midwinter

I will be attending ALA Midwinter at the end of this month and look to meet many of you for the first time. If you want to set up a time to meet with me please drop me a note, or you can stop by the ProQuest booth (#2611) and ask if I'm there. The

best bet is to drop me a note though.

And also remember, we are hosting upcoming Summon Camp there on Saturday, January 31. It'll be in the Continental Room A, at the Hilton Hotel, starting at 10:00 a.m. All details are posted on our [event registration page](#). I should note that we are focusing more time on ensuring you get to talk with your colleagues. Some of these topics will be: customizing Summon, integration aspects (including LibGuides into Summon 2.0), analytics and usage, surveying user satisfaction, relevancy, and brainstorming product development ideas.

If you can't make it to Summon Camp, but have specific topics you'd like us to cover in future webinars, please fill out our [brief survey](#).

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

January 13, 2015

Enhancements to Summon 2.0

- Preview button for tablet and phone mode is now available via desktop mode. Provides an additional way to access the right side [Preview pane](#).
- Feedback Form - the [form](#) for end user feedback is now available.
- API: Reliability Improvements better error handling

Bug Fixes for Summon 2.0

- Advanced Search: Changes to the Advanced Search [settings](#) in the administration console are now reflected on the Summon UI
- Fixed advanced search drop downs so they no longer display "A" in IE9
- Accessibility bugs addressed, including making Skip Navigation links act as regular links and correcting labeling on Advanced search, Saved Items Dialog toggle, and From and To buttons
- Facets/More facet pane counts should now be the same; they differed in some cases previously
- Resolved issue with cleaning [saved items](#) upon user closing the browser

Newly Indexed Content

- Vandenhoeck Ruprecht (Journals)
 - getAbstracts (Abstracts for business books)
 - RMIT Publishing EduTV (Streaming Video)
-

January 13, 2015

Upcoming Webinar: Hacking Summon 2.0 the Elegant Way

I just wanted to pass along a note that we are putting together some webinars to help you learn from others using Summon.

The first of these webinars will begin next Tuesday, January 20 and will feature two of your colleagues from Virginia Tech. Details about the webinar are noted below. We will also record the session and make them available after the session.

These webinars will supplement the exchange of ideas that you currently benefit from during our various user group meetings and through traffic on this listserv. In the event that you have an idea for a webinar topic or would like to present, please send a brief email to my colleague at scott.schuetze@proquest.com.

Hacking Summon 2.0 the Elegant Way

Date: Tuesday, January 20, 2015 at 11:00 AM EST (7:00 PM UTC)

Registration: click [here](#)

Description:

Libraries have long been adding content and customizations to vendor-provided web-based search interfaces, including discovery systems such as ProQuest's Summon service. Unlike solutions based on using an API, these approaches augment the vendor-designed user interface using library-provided JavaScript code. In this webinar, based on their [Code4Lib paper Hacking Summon 2.0 The Elegant Way](#), you will learn how Virginia Tech University reverse-engineered the AngularJS-based Summon 2.0 interface to discover the modules, directives, controllers, and services it uses, and how they used AngularJS's built-in mechanisms to add desired customization and interactions.

Presenters:

- *Annette Bailey, Assistant Director for Electronic Resources and Emerging Technology Services, Virginia Tech:* Annette Bailey is currently the Assistant Director for Electronic Resources and Emerging Technology Services for the Jean Russell Quible Department of Collections and Technical Services at Virginia Tech. Bailey serves on the Program Planning Committee for the ER&L Conference. She co-developed the open source LibX plug-in, for which she received the 2007 LITA Brett Butler Entrepreneurship Award. She won a National Leadership Grant in 2006 for LibX and in 2008 for LibX 2.0. Her role in Collections Technical Services is to ensure best practices are implemented as workflows and data change for electronic resources.
- *Dr. Godmar Back, Associate Professor of Computer Science, Virginia Tech:* Dr. Godmar Back is Associate Professor of Computer Science at Virginia Tech, where he has been doing research and teaching in Computer Science since 2004. Dr. Back obtained his PhD from the University of Utah and worked as a post-doctoral scholar at Stanford University. His research interests are diverse, including operating systems, virtualization, web technology, scientific computing, programming languages, and library information systems. He is an active collaborator with librarians in the area of advancing library technology to ensure that modern technology can find its way into the library sphere. Since 2007, he has been involved in the LibX project, providing technical supervision and input. Recently, he has been leading the LibFX project (libfx.lib.vt.edu) which creates online visualizations of real-time library usage.

Brent D. Cook, Director, Product Management

brent.cook@proquest.com

January 7, 2015

Status Update

Due to some issues discovered during our testing and deployment of the release scheduled for today, we need to delay publishing the release until **next Wednesday the 14th**. Because of this change, we are executing a search index update now and will try to include a second this week as well.

The first search index update was initiated Tuesday, January 6 at 13:05 EST and should be completed on Thursday. We plan to kick off a second index update as soon as that one is completed, to be released Saturday.

To support the release going live on the 14th, next week we will have only one search index update, scheduled to begin Wednesday, January 14 and go live on Friday, January 16.

Recording of December Summon Update; Training Webinars

Thanks to everyone who attended our customer update last month. If you want to revisit any of the details or were unable to attend, you can find a recording in the **Recorded Special Event Webinars** section of the Support Center article [Recorded Training Sessions](#). Schedules for our live training webinars are on the [Training Webinars](#) page, click **The Summon Service and 360 Discovery Services** or click **360 Management Services** for training on our management products.

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

December 12, 2014

Status Update

We just completed our most recent Summon index update on Tuesday, December 9, at 21:14 EST (Wednesday, 02:14 UTC). Our next index, originally scheduled to go live on Friday, December 12 will be delayed by a day and will go live on Saturday, December 13. We needed to extend the window to allow for re-indexing some of our larger content sets as part of regular maintenance. We apologize for this.

As a reminder, we will for the weeks of December 22 and December 29, we will be publishing only one index update because of the holiday schedule. Index updates are expected to be published on Wednesday, December 24 and Wednesday, December 31.

Finally, if you haven't yet, please sign up for one of our two upcoming Summon customer update webinars on Thursday, December 18. We'll provide a more formal introduction to the current Summon team (myself included), review current work, share some of the details on our roadmap for the first quarter of 2015, and answer any of your questions. You can register for these events now and we will make a recording available to you after the event.

- Thursday, December 18 at 9:00 AM EST (2:00 PM UTC)
- Thursday, December 18 at 12:00 PM EST (5:00 PM UTC)

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

December 5, 2014

Status Update

We just completed our most recent Summon index update on Wednesday, December 3, at 02:24 EST (07:24 UTC). Our next index updates should be live today, Friday, December 5. We expect this regularity to continue after the beginning of

the new year, though for the weeks of December 22 and December 29, we will be publishing only one index update because of the holiday schedule. Index updates are expected to be published on Wednesday, December 24 and Wednesday, December 31.

I also wanted to let you know about two upcoming **Summon customer update webinars** on Thursday, December 18. We'll provide a more formal introduction to the current Summon team (myself included), review current work, share some of the details on our roadmap for the first quarter of 2015, and answer any of your questions. You can register for these events now and we will make a recording available to you after the event.

- Thursday, December 18 at 9:00 AM EST (2:00 PM UTC)
- Thursday, December 18 at 12:00 PM EST (5:00 PM UTC)

Lastly, the ALA events team has recently assigned us our room for the upcoming **Summon Camp at ALA Midwinter** on Saturday, January 31. It will be in the Continental Room A, at the Hilton Hotel, starting at 10:00 AM. All details are posted on our [event registration page](#).

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

November 23, 2014

Status Update

We just completed our most recent Summon index update on Saturday, November 22, at 01:40:46 EST (06:40:46 UTC). Next week, due to the holiday schedule in the United States, we will be publishing only one index update on Wednesday, with the next index starting on Monday, December 1 and being published Wednesday, December 3.

I also wanted to remind you about the Summon Camp at ALA Midwinter in Chicago on January 31, from 10:00 to 12:30pm CST. You can [register for this event now](#) and we will contact you with the event location details as they become available. I'm looking forward to meeting with many of you during this event and throughout the conference.

As always, please let me know if you have questions or if there is anything else I can do to assist.

Brent D. Cook, Director, Product Management
brent.cook@proquest.com

November 12, 2014

Enhancements

- Improvements to reduce 404 errors
- Summon 2.0: Improved notifications to the end user related to browsing with cookies disabled
- Summon 2.0: [Accessibility](#) - Revised link colors to be fully WCAG 2.0 and Section 508 compliant
- Summon 2.0: Prioritize full text records over citations when selecting a record to drive linking behavior

Bug Fixes

- Search tracking in **Google Analytics**
- Summon 2.0: **A&I Details Page** - shows Available in Print when there is no print or electronic access
- Summon 2.0: **A&I Details Page** - Provider Name is missing in "Other Available Sources" section
- Summon 2.0: **Corporate Author** field/logic missing from Preview pane
- Summon 2.0: Availability for docs in the "Access this Journal Article in" section is not showing all participants' availability
- Summon 2.0: **A&I Details Page** - Incorrect display for "Request" button
- Summon 2.0: IE11 and Windows 8.1 page load fails
- Summon 2.0: **Preview pane** - Database field (labeled "Source") is not visible

Newly Indexed Content

- **American Society of Civil Engineers** - eBooks and Journals
 - **World Bank** - Development Indicators
 - New **Alexander Street Press** collections, including:
 - Asian Film Series Online
 - Business E-Books Online
 - Classical Scores Library Vol. 3
 - Engineering Case Studies Online
 - Environmental Studies in Video
 - Fashion Studies Online: The Video Fashion Library
 - Filmmakers Library Online Vol. 3
 - LGBT Thought and Culture
 - Meet the Press
 - Nursing Assessment in Video
 - Nursing Assistant Education in Video
 - Psychological Experiments Online
 - Public Library Video Online
 - The Criterion Collection
 - The PBS Video Collection
 - Veterinary Education in Video
 - Education in Video Vol. 2
 - International Business Online
 - The Video Journal of Counseling and Therapy
-

October 15, 2014

Enhancements

- **Accessibility** We have added improved keyboard navigation, modal dialog support, and ARIA alerts for enhanced [accessibility](#). In our next release we will achieve WCAG 2.0 compliance by changing some text and link colors to increase contrast.
- **Advanced Search** [Advanced Search](#) users can select more than one content type as we have converted the Content Type drop-down to a multiple select option.
- **Faster page loads** We have increased the speed of page loads for Summon 2.0 by modifying the user interface so that assets load asynchronously.

Bug Fixes

- Improved visual cues for loading pages or apps running in Summon 2.0.
- Better support for Multiple Subject Terms.
- Improved BibTeX export in Summon 2.0.
- Improved Resource Link Prioritization in the Administration Console.
- Better translations support - Translations on detail pages are now also applied to the Summon 2.0 interface.
- Improved Advanced Search Tool - improvements to handling content types, fixes for revised searches, keyboard navigation fixes, better handling of parentheses in Boolean searches and other improvements in Summon 2.0.

Newly Indexed Content

- **Bloomsbury Academic** - Berg Fashion Library.
 - **Chadwyck Healey** - Queen Victoria's Journals.
 - **Chadwyck Healey** International Index to Film Periodicals (FIAF).
 - **ChinaLaw**
 - **Indian Journals**
-

August 20, 2014

Enhancements

- **Accessibility** The Summon 2.0 interface now supports [keyboard-based navigation](#).
- **Flow Integration** The new [Flow integration](#) can now be enabled/disabled from the Summon Admin Console. Watch the overview for [Summon+Flow video](#).
- **Right to Left Language Support** Hebrew, Arabic and Farsi will now be displayed with the Summon 2.0 UI in Right to Left mode.

Bug Fixes

- **Login Link** The new Login link will now use the customized color for the links within the header.

- **Saved Items** The "back to basic search" link will now use the customized color for the links within the header.
- **Language Dropdown** - The options in the language dropdown will no longer use the customized color for the links within the header.
- **Accessibility** - Some of the links within the Summon 2.0 interface were missing an href attribute causing screen readers to not recognize the links.

Newly Indexed Content

- **Hiperlink Egitim Iletisim** - Hiperkitap offers over 7,500 e-book titles from 220 Turkish publishers. The database collection includes academic and general culture subjects: behavioral sciences, economy, environment, history, humanities, law, literature, management, medical and health sciences, music, philosophy, political sciences, and sports.
- **Key Note** - Provider of market intelligence in the UK - company reports, market research.
- **Kluwer Law** Kluwer Law International Professional Books series.
- **Kyobo Book Center** - Kyobo is the largest chain of book stores in South Korea.
- **McGraw-Hill** - The McGraw-Hill eBook Library offers about 1500 titles in pre-assembled collections covering engineering, computing, business, medicine, and study aids.

July 9, 2014

Enhancements

- **Performance** Summon 2.0 will now use a global Content Delivery Network (CDN) to serve images, Javascript and CSS in a faster manner improving page load times.
- **Accessible Version** Summon 2.0 will now provide a link to an [Accessible Version](#) just as with the legacy Summon interface.
- **Highlighting in the Chinese Locale** Summon 2.0 will now support red font color for matching terms rather than bold font.
- **COinS and Record IDs** Each record in the search results of Summon 2.0 will now have a COinS and a Record ID to support javascript as well as tools such as Zotero.
- **Responsive Design** In the [mobile](#) view, additional metadata such as Publication, Date, etc. will now display in the search results.

Bug Fixes

- **Screen Flash** In Summon 2.0, the screen will no longer flash when coming from an external search box.
- **Authentication Banner** The authentication banner will now disappear for sites that have it disabled in the Admin Console.

Newly Indexed Content

- **ProQuest** - Black Studies Center Journals
- **ibooks.ru** - Over 6,000 educational, scientific and business ebooks from leading Russian publishing houses
- **Metapress** Maney - Maney Publishing - 18 of their journals that Metapress hosts.

- **Oxford University Press** - Oxford Handbooks Online
- **Oxford University Press** - Oxford Research Encyclopedias
- **Oxford University Press** - University Press Scholarship Online
- **udn.com** - Over 6,000 Chinese ebooks
- **Bloomsbury Berg Fashion** - Berg Fashion Library from Bloomsbury Academic includes the Berg Encyclopedia of World Dress and Fashion online, e-books, ejournals, and images
- **ProQuest** - European Books Online
- **Media Korean Studies** Includes the eBook collection and the Korean Anthology in History collection
- **Skillsoft Books 24x7 International** - Book collections in Spanish, French, and German
- **Skillsoft Videos** The Video Collections include Leadership Development Channel; 50 Lessons; Skillsoft IT and Desktop Videos
- **University of Chicago Press** Journal articles from the University of Chicago Press

June 3, 2014

Enhancements

- **Scopus Times Cited** - Summon 2.0 will now display [times cited](#) counts from Scopus in the results for subscribers of Scopus.
- **Skip Navigation** - Summon 2.0 will now have "[skip navigation](#)" links allowing users of assistive technology to easier navigate the screen.

Bug Fixes

- **Multiple Availabilities** - Summon 2.0 will now show multiple availability lines including Real-Time Availability in the same way as the legacy Summon interface.
- **Search Widgets** When using IE 10, IE 11 and certain versions of Firefox, searches would fail or result in a blank screen when starting with a Summon Search Widget.
- **Korean Language** When using certain versions of IE, various characters in the Korean language would not be processed correctly.
- **Interface Translations** Numerous terms in the Summon 2.0 interface have been made translatable.
- **Content Spotlighting** When a search results in only newspaper articles or only images with out a content type filter applied, the results will now display correctly.
- **Date Localization** The publication date picker was not localized on many languages other than English.
- **Changing Interface Language** When a user changes the interface language, the Topic Explorer will reflect the language change.
- **Advanced Search** Fielded search will no longer have quotes automatically applied.
- **Catalog Detail Page** Action button will now correctly display on the right hand of the screen rather than at the bottom of the page.
- **Advanced Search** A new field option for LC Call Number will be available. Dissertation Advisor and Dissertation Institution will be removed.
- **Items at My Institution** For consortium institutions, the Items at My Institution filter will now include only the library's electronic holdings and local print holdings, excluding records from other consortium members.
- **Authentication Banner** When marked as disabled in the Summon Admin Console, the Summon 2.0 interface will hide

the banner.

Newly Indexed Content

- **American Mathematical Society** ebook collection.
- **Chadwyck-Healey** - Content from 19th Century Index, including Palmer's Index and Nineteenth-Century Short Title Catalogue.
- **Chadwyck-Healey** - DKV (Deutscher Klassiker Verlag), part of the Chadwyck-Healey German Literature collection.
- **Oxford University Press** - Oxford Reference Online.
- **PAGEPress** - An Italian publisher of about 45 peer-reviewed Open Access scientific journals covering several science fields including medicine, biology, zoology, agriculture, and others.
- **Swedish National Library** - The Swedish National Bibliography.
- **American Council of Learned Societies** - ACLS will include their humanities ebook collection comprised of over 2800 ebooks in the humanities, offered in collaboration with twenty learned societies, and 100 contributing publishers. ACLS adds 500 new books each year.
- **Central and Eastern European Online Library (CEEOL)** - C.E.E.O.L. is an online archive which provides access to full text PDF articles from 486 humanities and social science journals and re-digitized documents pertaining to Central, Eastern and South-Eastern European topics.
- **Highwire (incl. Duke University Press - eDuke Books Scholarly Trust Collection)** - The Duke University Press eBook collection.
- **Spandidos Publications** The Spandidos Biomedical Journals.
- **Wordpedia.com** The Taiwanese provider Wordpedia.com has included metadata for 200,000+ journal records and 3,000 eBooks in Summon.
- **Wu-Nan Book Co. Ltd.** - A major academic and textbook publisher in Taiwan. During the last thirty years, Wu-Nan has published more than 2000 titles, mostly about social science. In the future, Wu-Nan will publish the subject of natural science. In recent years, Wu-Nan has translated more than 300 foreign works to Chinese.

March 19, 2014

Enhancements

- **Responsive Design** - Summon 2.0 will now have [different views](#) based on the size of the user's screen to optimize for the best experience.

Newly Indexed Content

- **CASPUR-CIBER Publishing** - The Italian publisher, CASPUR-CIBER Publishing, affiliated with the University of Salento, includes the scholarly journal Scires-IT and three monographs <http://caspur-ciberpublishing.it>.
- **Chadwyck-Healey - AFI** - The American Film Institute (AFI) Catalog, the premier, authoritative resource of American film information, covers the history of American cinema comprehensively from 1893 to 1975, with full or short records for films from 1976-2011. New records are added each year by the AFI's editorial team.
- **Chadwyck-Healey - Cecil Papers** - The Cecil Papers are a privately held archive of approximately 30,000 sixteenth and seventeenth-century manuscripts, consisting principally of the correspondence of William Cecil, Lord Burghley (1520-1598) and his son Robert, the 1st Earl of Salisbury (1563-1612).
- **Chadwyck-Healey History Study Center.**

- **Chadwyck-Healey Johnson** - John Johnson Collection of Printed Ephemera. Offering unique insights into the changing nature of everyday life in Britain in the eighteenth, nineteenth and early twentieth centuries. Categories include Nineteenth-Century Entertainment, the Booktrade, Popular Prints, Crimes, Murders and Executions, and Advertising.
- **Edward Elgar Publishing Ltd** - Edward Elgar launched their own platform for Ebooks (elgaronline).
- **European Journal of Economic and Political Studies**.
- **Health Communications Network** - The Australian publisher Phoenix Medical Publishing Pty Ltd has included the AusDI Advanced online medicines information resource. AusDI Advanced includes full-text, evidence-based drug, drug-class and complementary medicines monographs, product information (PI), consumer medicines information (CMI) leaflets and medicines images with fully searchable attributes.
- **JSTOR JSTOR Ebook Collection**
- **Maruzen E-book Library**
- **NBC - NBC Learn Higher Ed** - collection of primary source videos, newsreels, and documents that can be used for research, projects and in classroom and online teaching. Includes over 10,000 resources - short 2 to 5 minute videos aligned to 28 Higher Ed courses - topics range from Biology, Chemistry, Physics, U.S. History, Global Studies, Health & Nursing, Psychology, Business, Marketing, Journalism, Sociology, and more.
- **Nordic Council of Ministers** - The Nordic Council of Ministers is the forum for Nordic governmental co-operation. The publications department publish about 200 publications per year, including project reports, which may form the basis for political decisions (TemaNord series), and publications that communicate political messages (ANP series). <http://www.norden.org/en/publications>.
- **Oxford University Press - Oxford Scholarly Editions online**.
- **Yerk re Tan t m ve Yay nc l k** - All available issues of the Turkish journal Sisli Etfal Hastanesi Tip Bulteni/The Medical Bulletin of Sisli Etfal Hospital. http://www.sislietfaltip.org/default_eng.asp.
- **Slack Inc.** - Covering more than 20 health care specialties, SLACK publishes leading medical journals and newspapers, more than 250 medical and allied health books, and creates custom projects for a growing number of clients.
- **Van Duuren Media BV** - Van Duuren Media is a Dutch publisher of non-fiction books and specializes in research funding, studies, photography and management. <http://www.vanduurenmedia.nl/eBooks/>.

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Bug Fixes

- **Back Button** - In Summon 2.0, the back button will now allow the user to go back to the previous page.
- **Custom Link Field** - In Summon 2.0, custom javascript is printed verbatim. This will now be hidden.
- **Saved Items** - When deleting items from the Saved Items Folder the user will now be prompted.
- **Embed in an iFrame** - Summon 2.0 will now support being embedded within an iFrame.

Release notes from years past are available in [Summon: Release Notes \(2013 and earlier\)](#).

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