
Summon: Discovery Inclusion Criteria Overview

Introduction

This document is meant to quickly communicate our inclusion requirements and delivery options for hosted electronic content. For greater detail, please contact Provider.Relations@exlibrisgroup.com.

Content Types

Summon and Primo discovery products index the following content types:

- Electronic Serial Resources, such as journals and newspapers (article-level content is required; more details below)
- Electronic Monographic Resources, such as ebooks (chapter-level content is strongly requested; more details below)
- Images, such as cover thumbnails, image thumbnails, and other images to be displayed with content (provide a file with URL links to images or host an image file on your own FTP for us to pick up)
- Other content types, such as videos, conference proceedings, dissertations, and reports, may also be accepted; if you are interested in having other content displayed please contact Provider.Relations@exlibrisgroup.com for further information

Metadata Elements

Discovery of your hosted content is optimized by including as many of the metadata fields listed below as possible. For prioritized acceptance, **bold** fields are required, *italicized* fields are recommended, and roman fields are requested. In addition to item-level metadata, we also require a KBART title list and expected record count for linking and quality assurance purposes.

Ebooks

Unique record identifier, ISBN, EISBN, Publication Title, Title-Level URL, Author(s) (can substitute Editor(s)), Date Published, Language, Parallel title (for languages other than English), Discipline, Editor(s), Publication Series Title, ORCID identifiers, Place of Publication, Full Text, LCCallNum, DEWEY, Series ISSN, Book DOI, Abstract, Type of work, Collection indicator, Subject Terms, Deletion indicator, Open Access indicator, Peer Review indicator, Publication Subtitle, Publisher, Edition, Book Description, Page Count, Table of Contents (if not included in full text), Associated DOIs for each chapter, book cover thumbnail URL, Data Provider Logo (For Primo Central Index only - 120 x 24 or 134 x 31)

Ebook Chapters

Unique record identifier, ISBN, EISBN, Chapter Title, Publication Title, Chapter-level URL, Author(s) (can substitute Editor(s)), Date Published, Language, Start Page, Chapter Number, Parallel chapter title (for languages other than English), Parallel publication title (for languages other than English), ORCID identifiers, Discipline Editor(s), Full Text, LCCallNum, DEWEY, DOI, Publication Series Title, Subject Terms, Series ISSN, Associated DOIs for the book and each additional chapter, Abstract, Type of work, Collection indicator, Deletion indicator, Open Access indicator, Peer Review indicator, Chapter Subtitle, Publication Subtitle, Publisher, Place of Publication, Edition, Book Description, End Page, Page Count, Table of Contents (if not included in full text), book cover thumbnail URL, Data Provider Logo (120 x 24 or 134 x 31)

Journal/Newspaper Articles

Unique record identifier, ISSN, EISSN, Article Title, Publication Title, Publication Date, Volume, Issue, Start Page, Article-level URL, Author(s), Language, Parallel article title (for languages other than English), Parallel publication title (for languages other than English), ORCID identifiers, Author Affiliations, Discipline, Subject Terms, Abstract, Full Text, DOI, End Page, Direct link to full article, Type of work, Collection indicator, Deletion indicator, Indicate whether a specified work is free-to-read (see NISO RP-22-2015), Open Access indicator, Reference to a URI carrying re-use rights granted to a reader of a work (see NISO RP-22-2015), Peer Review indicator, Article Subtitle, Publication Subtitle, Page Count, Dateline, Publisher, Total number of words, journal/newspaper cover thumbnail URL, Data Provider Logo (120 x 24 or 134 x 31)

Inclusion of content that does not meet these criteria may be possible, but requires evaluation to determine feasibility and will likely require additional processing time.

Supported File Delivery Methods (in order of preference)

Delivery Method	Description
ProQuest-hosted FTP Site (FTP push)	Upon request, ProQuest will provide a secure login and site
Provider-hosted FTP Site (FTP pull)	An FTP site hosted on the content provider's domain; will provide secure login
OAI-PMH Harvest	Provide the OAI-PMH URL for ProQuest to conduct a harvest of Dublin Core records; requires IP authentication for full text harvesting

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Other delivery methods may be possible, but will require evaluation to determine feasibility and will likely require additional processing time.

Metadata Standards Supported

- XML (including XML in Dublin Core/XML with NLM DTD/XML with ONIX DTD/XML with custom DTD/Custom XML without DTD)
- ONIX for book-level metadata
- MARC21/MARC UNIMARC (binary – not ASCII)/MARCXML for publication-level metadata
- Excel spreadsheets
- JSON
- Delimited Text Format (Tab Delimited or CSV) for publication-level metadata

Other standards may be possible, but will require evaluation to determine feasibility and will likely require additional processing time.

Full Text

If applicable, full text (used for indexing purposes) can be accepted in the following formats:

- XML
- PDF

Direct Linking

To ensure access to your digital content, we require direct links to each record. This allows our mutual customers to directly access the content hosted on your platform if their library has subscribed and the user has been authenticated per the terms of your website. In addition, include DOI's if available.

End-users expect to click on a link from the Summon or Primo results page and be directed to the specific record. Links to a generic home page or search form provide an unsatisfactory experience. Our mutual clients do not expect to rerun their search in your platform to locate the desired item.

An alternative to providing us with direct links is to provide us with the linking syntax and the necessary field names. We can create the links independent of your content.

Also, supply link to full text of document on native interface.

Further Inquiry

If you have any questions about the described Summon and Primo inclusion criteria, please contact your Provider Relations Specialist at Provider.Relations@exlibrisgroup.com. We will be happy to answer any questions you may have and/or arrange a demonstration of the Summon and Primo products.