
Summon Search Exercise

A search exercise for librarians to demonstrate basic and advanced searches in Ex Libris' Summon.

What is it?

This toolkit is designed to provide you with best practices and resources to pinpoint librarian/staff opinions of your Summon discovery service. Use this toolkit to learn more about the habits/opinions of your staff to gain a better understanding of how you can promote your discovery service amongst your colleagues and library patrons.

When to use this toolkit?

This toolkit is a good resource if you are:

- In the process of launching/introducing Summon to your library
 - When you've made any changes to your discovery service and you'd like to solicit feedback from your colleagues
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Administering the Search Exercise

- Have participants fill out the [following document](#). Before giving your colleagues the document, however, be sure to include keywords/search terms that would commonly be used by your library patrons.
 - Have them follow the written instructions and record their responses.
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Compiling the Search Exercise Data/Results

- Once you have their responses, take time to read through them carefully. Record all feedback and divide it into objective (quantitative) and subjective (qualitative) feedback.
 - Take note of any recurring themes, issues, or challenges your colleagues run into. Prioritize the most frequently mentioned themes and configure your Summon discovery layer accordingly.
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Common Themes You May Encounter

- Colleagues aren't familiar with how the Discovery Service works.
 - Solution: Provide them with [these videos from Ex Libris' Knowledge Center](#)
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- Colleagues don't understand how Summon ranks results.
 - Solution: Have them read up on [Summon's Relevance Ranking](#)
- Staff have not used Summon in a while and are unfamiliar with User Interface changes
 - Solution: Schedule a meeting to provide a live demonstration of the most frequently used features by patrons
- Library staff are running content access issues with certain providers
 - Solution: Please check the Client Center to ensure all your subscriptions are up to date and tracked within Summon. Check to ensure any tokens/Gale LocIDs/authentication credentials have been added for providers that require this information included in URLs. Contact your Customer Success Manager if you need more information about this type of issue. If problems continue to persist please file a Support Case using the Support Portal.
- Links are not working correctly
 - Solution: If you have 360 Link, make sure you have enabled Index Enhanced Direct Linking (IEDL Linking) or check your institution's link resolver to ensure it is configured correctly. Report any broken links to Ex Libris Support in the Support Portal.
- Staff are unfamiliar with why certain materials are discoverable and Summon and some materials are not.
 - Have them review the [differences between Client Center and Summon content](#) as well as [Provider Content in Summon's Central Discovery Index](#).
- Summon brings back too many search results that the staff/library patron finds overwhelming
 - Review [Ex Libris' "How Do Library Users Search & Discover" White Paper](#)

Please note these are just a few of the themes you might run into when conducting this search exercise. If your team identifies challenges or situations unique to your library, contact your Customer Success Manager as they can help you develop solutions tailored to your institution. If you don't have the contact information for your Customer Success Manager or if your current Customer Success Manager is unavailable, please email customersuccess@exlibrisgroup.com for help.