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Simplifying resource discovery and access in academic libraries: implementing and evaluating Summon at Huddersfield and Northumbria Universities

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Abstract

The University of Huddersfield and Northumbria University were two of the first commercial adopters of the Summon web-scale discovery system in Europe. Both universities had encountered issues with their existing federated searching products, with students and staff expressing dissatisfaction.

This chapter describes the selection, implementation and testing of Summon at both universities drawing out common themes and differences, with suggestions for those intending to implement Summon and some ideas for future development.

Key Terms

Summon, Resource Discovery, Metasearch, Federated Search, NORA

Introduction

Facilitating information discovery and maximising value for money from library materials is a key driver for academic libraries (Shipp, 2009). Users are confused by the complexity of our collections and are often reluctant to spend time learning how to use individual databases - comparing them unfavourably to intuitive search engines like Google (Duddy, 2009). As a consequence, the library may be seen as too complicated and time consuming and many valuable resources remain undiscovered or underused. Federated search tools were the first commercial products to focus on this problem. While going some way to address this issue, users complained that they were clunky and complicated to use (Stone, 2009). In 2007, Tenopir (2007) commented that "The jury is still out on federated search systems, even though more libraries now have them. There are murmurings that federated search has lower-than-expected use and may not be the magic search bullet we were led to believe" (p. 30)

The development of web-scale discovery services promised to improve the search experience by harvesting and indexing metadata direct from publishers and local library collections into a single index, making searching simple and fast. (Gibson, et. al. 2009)

The Universities of Huddersfield and Northumbria are similar institutions: both are large UK 'post-1992' universities (23,000 and 24,000 FTE students respectively) with specialist and

increasing areas of research excellence. At Huddersfield the Library is part of a converged Computing and Library Service while Northumbria Library and Learning Services is separate from the University IT department. While both University Libraries have been successful in delivering innovative and user centric services, Huddersfield have a dedicated Library Systems Manager with the technical expertise to customise systems to local requirements. At Northumbria, the policy has been to outsource and develop computer systems with third party suppliers rather than in house.

In 2009 both Huddersfield and Northumbria Universities purchased Serials Solutions Summon to replace existing federated search products. This case study describes the selection, implementation and testing of Summon at both universities drawing out common themes and differences, with suggestions for those intending to implement Summon and some ideas for future development.

Selection

Huddersfield

At Huddersfield a project group was established to examine the existing arrangements for the provision of e-resources and suggest recommendations for the future. One of the tasks of the project team was to invite suppliers in to discuss products in order to understand the different offerings within the market place. A 'clean sheet of paper' approach was used, with the project team identifying four main 'vision objectives' for the future system.

- First class search engine
- Provide a 'one stop shop' for all electronic resources
- Greater interoperability and flexibility
- More efficient management and administration

These criteria were used to evaluate supplier offerings from a range of suppliers of discovery solutions including Ex-Libris, EBSCO and Serials Solutions as part of the review. As a result it was agreed to conduct a restricted European Union (EU) tender for a provider of a library discovery service of pre-harvested content. The contract was awarded to Serials Solutions.

Northumbria

Northumbria had been using WebFeat federated search alongside Serials Solutions electronic resources management products (360 Core KnowledgeBase, 360 Link -OpenURL link resolver and 360 Resource Manager) since 2006. In February 2008 WebFeat was purchased by Proquest / Serials Solutions whose stated intention was to migrate WebFeat and Serials Solutions 360 Search to a single federated search product. Northumbria therefore had to make the decision to either migrate to the new Serials Solutions federated search or look for an alternative search and discovery solution.

With the emergence of web-scale discovery services, suppliers were invited to demonstrate their systems during early 2009. In addition to Summon, Primo from Ex Libris and EBSCO

Discovery Service were considered. After analysing each of these Northumbria selected Serials Solutions Summon for four main reasons:

- Breadth of content
- Ease of use and the subsequent improvement to the student search experience
- Hosted solution operated and fully supported by 3rd party supplier
- Integration with existing Serials Solutions products
- Value for money pricing - Serials Solutions were keen to get some early adopters in the UK and offered an attractive upgrade path from WebFeat federated search to Summon.

Implementation

Serials Solutions aim to have each Library's instance of Summon configured within six weeks once configuration information and local data have been supplied to them. Table 1 shows the estimated and actual implementation times at Huddersfield and Table 2 those at Northumbria.

Milestones	Estimated implementation Date	Actual implementation Date
Contract signed	Aug 2009	Aug 2009
Implementation starts	Sep 2009	Sep 2009
Summon instance delivered	Oct 2009	Oct 2009
Beta launch	Jan 2010	Mar 2010
360 Link to replace SFX	Aug 2010	Feb 2010
E-resources wiki to go live	Aug 2010	Mar 2010
Summon to replace MetaLib	Aug 2010	Aug 2010

Table 1. Implementation milestones at Huddersfield (Stone, 2010)

Milestones	Estimated implementation Date	Actual implementation Date
Contract signed	Oct / Nov 2009	Oct / Nov 2009
Implementation starts	Nov 2009	Dec 2009
Summon instance delivered	Jan 2010	March 2010
Beta launch	May 2010	June 2010
LibGuides implemented	July / Aug 2010	Aug 2010
Exports from Library catalogue set up	April / May 2010	July 2010
Summon to replace WebFeat	Sep 2010	Aug 2010

Table 2. Implementation milestones at Northumbria

The main steps are described below.

Supply of a full export of local catalogue metadata in MARC21 format

At Northumbria the work to extract the catalogue records was done by the ILS supplier (Capita, formerly Talis¹). Since Northumbria were the first Talis library to implement Summon, this did take longer than anticipated, but once Serials Solutions received the data Summon was delivered within the six week timescale as promised.

At Huddersfield it was necessary to review some cataloguing practices. Print and e-book records, which had previously been catalogued under a single record had to be separated out before loading into Summon. Major inconsistencies in cataloguing practices also became apparent, e.g. music scores failed to show in Summon and DVDs showed as books. These errors in the MARC header fields were fixed by global edits to the records.

MARC mapping

Serials Solutions supply a MARC mapping spreadsheet so that each Library can decide how the library catalogue data is indexed and displayed in Summon. Huddersfield used the default mappings but Northumbria wanted to apply more customisation. As early adopters, it would have been helpful to experiment with different mapping configurations on a test site, but in the end default mapping was used. With hindsight, it is worth spending some time getting this right because the time it can take to rectify MARC mapping errors can be quite substantial and until it is corrected the catalogue data may look odd.

Supply of configuration data

The data supplied was

- Library web site URL
- OPAC Record URL - the base URL for a direct link to a record page in the OPAC
- Summon URL Codename - based on the institution domain name
- Summon Web Site Title
- Details of Link Resolver and Base URL
- Authentication EZProxy URL
- IP Range
- Feedback email address – the address to which feedback is delivered through the link on the Summon interface
- Image files (institutional logos)

Setting up a process to send regular exports of record updates from the ILS to the Serials Solutions Summon server

At Huddersfield all print books and journal records were exported into Summon fairly easily. In-house scripts were developed to upload deletions, changed records and new records on a daily basis. The process did not run as smoothly as planned; there were initial communication issues with deletions, which took some time to be processed, although this is now working well. E-books, e-journals, "fast adds", temporary Inter-Library Loan records and records that were on order or unavailable in the upload were not included in the upload.

At Northumbria the implementation of a new version of the library catalogue (Talis Prism3) provided the facility for setting up a regular export of catalogue record updates to the Summon server. Talis used the existing functionality within the ILS that generates new, edited and deleted files for the OPAC, to do the same for export to the Summon server.

Updating local electronic resource holdings

As existing Serials Solutions customers Northumbria's full-text e-resources were already included in the knowledge base; abstracting and indexing databases were also added. At Huddersfield the migration of data from SFX to 360 Link went very smoothly and the majority of changes were completed quickly, in fact the implementation of 360 Link was brought forward significantly (see Table 1).

Including other Library resources

The initial six week configuration includes MARC mapping and knowledge base set-up only. Libraries then have the option of adding further in-house resources, institutional research repositories were the priority here for both universities. The process for including the data depends on whether the repository supports the OAI-PMH protocol, if so, data can be automatically harvested and this was the case with Northumbria's D Space based repository. At Huddersfield loading data from the EPrints repository into Summon was straightforward, but there are ongoing issues with the display because metadata only records are treated as though they are full text records, which can be frustrating for users. A further advantage of adding Institutional Repositories are that all Summon customers can also add them to their own knowledge base.

Huddersfield's digital off-air recordings database was also included; this is password protected and not available to other Summon customers. It is hoped to add streaming videos of lectures in the near future.

Access to native databases & subject collections

Summon's coverage of publisher and aggregated content is extremely comprehensive and new content is added regularly², in fact on implementation Summon covered 94% of all journals that Huddersfield subscribed to and 87% of titles for Northumbria.

However, some resources are not (and may never be) included, for example law and chemistry resources, while other abstract and indexing resources such as Medline, Web of Knowledge and Scopus offer specialist searching, e.g. MESH headings and citation searching and therefore need to remain as standalone resources in their own right. Hence it is still necessary to provide

direct links to native databases and to group these into subject collections. Both Universities intended to do this regardless, recognising that Summon is an alternative not a substitute means of resource discovery.

At Huddersfield a wiki was used to generate alphabetical and subject lists³ and 'dummy' MARC records for databases were created to enable users to find database titles on Summon (see figure 1). Northumbria implemented Springshare's web-based LibGuides⁴ service to generate alphabetical and subject lists. This solution was relatively inexpensive and easy to customise. SpringShare work in partnership with Serials Solutions to facilitate the creation of an A to Z list of resources via the automatic export of the knowledgebase into the service. These links to native resources can then be reused within the subject collections.

Additionally, figure 1 shows a Database Recommender service that Summon has included to point users to subject specific databases based on their search terms and results.

[Insert Figure 1. Database recommender service and dummy MARC record for CINAHL]

Customisation

Customisation of the interface itself is limited. Adding institutional logos is the only element that can be changed on the main search pages. Therefore, both Huddersfield and Northumbria have developed their own Summon web pages which are hosted on institutional servers.

[Insert Figure 2. Northumbria University's NORA web page incorporating Summon search box]

However, both the 360 and Summon APIs⁵ allow for a certain amount of customisation, for example at Huddersfield, Summon has been linked to the in house MyReading project⁶. A tab is available on Summon to allow academics to add content to reading lists, thus automatically adding URLs, subject terms etc. (see Figure 3)

[Insert Figure 3 Beta test of a MyReading tab using the Summon API]

Authentication

No login or authentication is required to search Summon so anyone can use the system and find references and results that reflect the holdings in Huddersfield or Northumbria collections. Users cannot access full text until they have been authenticated and abstracting and indexing database metadata is only available to the subscribing Library. This approach was favoured by Serials Solutions and acts as a 'shop window' for potential customers. At Huddersfield authentication is via EZProxy where possible; at Northumbria access is either via Shibboleth or through IP address recognition via the University's desktop virtualisation service.

Serials Solutions have also developed an 'authentication banner'. This appears at the top of the Summon search screen and allows institutions with a proxy server to login at the start of their search rather than at the point of accessing full text; however this is not compatible with Shibboleth or Northumbria's desktop virtualisation service. Serials Solutions have

recommended that Northumbria pursue the possibility of a proxy server in order to streamline authentication for users.

Support and documentation

The support from Serials Solutions during the initial set up period was good, especially as they were setting up a significant number of new 'early adopters' at the same time and had to deliver these according to the stated time period of six weeks from receipt of configuration data. They were fast to respond to questions although sometimes more detailed guidance and documentation would have been helpful, e.g. in relation to the MARC mapping process.

After initial concerns excellent communication channels were established via the Summon user group, listserv and Serials Solutions. There is also a Summon wiki which is hosted by the Summon User Group⁵.

Feedback and usability testing

Summon was piloted at both Universities prior to its official launch, with federated search continuing to run in parallel. This allowed us to gather feedback and make further refinements before withdrawing federated search and formally launching Summon at the beginning of the new academic year in September 2010.

Feedback was gathered in a number of ways from staff and students through formal training sessions, demos and anecdotal feedback. Both Universities worked together to devise a similar online survey and a common approach to running focus group sessions. These are analysed in detail below.

Online survey results

There were 102 responses to the Huddersfield survey and 523 to Northumbria's. At Huddersfield the survey ran from March to July 2010, whilst the survey at Northumbria ran from June 2010 until the end of October 2010. The difference in response rate was probably due to the length of time the surveys were open. However the percentage breakdown of respondents by type and School were very similar, as was the feedback on the service.

Respondents

<i>Type of respondent</i>	<i>Huddersfield</i>	<i>Northumbria</i>
Undergraduate	63%	55%
Taught postgraduate	19%	26%
Research postgraduates	9%	7%
Other (including academic staff, support staff, visitors)	6%	5%

etc)		
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Table 3. Breakdown of respondents to online surveys

At both institutions over half of the respondents were undergraduates followed by graduate students and a small percentage of academic and support staff.

Responses

The table below shows the broad responses received to the main areas of the questionnaire for both institutions.

Online survey questions	Huddersfield response	Northumbria response
Easy to use	90% agreed	100% agreed
No help needed to use	63% agreed	76% agreed
Icons clear	88% agreed	93% agreed
Refined their search	44% did so	65% did so
Clear layout of results	89% agreed	88% agreed
Used advanced search	32% had used	42% had used
Did not use advanced search	68% had not used	58% had not used
Found what they wanted	77% agreed	85% agreed
Relevant results	82% agreed	88% agreed

Table 4. Response breakdown by institution

Ease of use

Respondents reported that the Summon screens were easy to understand, they also found the icons easy to use. At Northumbria there were many comments about preferring Summon to the previous federated search for its speed and ease of use. The majority of those who commented on ease of use felt that they would not require any help in using Summon. Other comments indicated that only a brief run-through was needed. Of the low percentage of people who would have liked more help, the majority asked for help screens or online user guides.

Some library users wanted to know which databases the results were from:

" I wasn't sure what databases I was searching in, but after completing a search I realised it showed anything relevant'. (Huddersfield)

“couldn’t see how to access Westlaw, Nexis, etc” (Northumbria)

On some occasions users at both universities have struggled with the concept of Summon as a ‘one stop shop’ approach compared to the use of ‘traditional’ online databases, which are still very relevant for specific disciplines and complex searches. Both universities added alphabetical lists and subject guides on web pages at the front end of Summon but this approach may lack clarity. Northumbria are currently reviewing the layout of their initial NORA web page in order to try to make the distinction more obvious for users, by possibly placing less emphasis on the Summon search box on the page and improving the guidance provided about accessing resources.

In a recent thread on the ILI-L Discussion List, Pete Coco of Grand Valley State University (Coco, 2011) outlines exactly what the advantages of Summon are in relation to information literacy and ease of use,

‘What Summon frees me to do... particularly in freshman courses, is to focus more on the concepts of information literacy that this system so elegantly demonstrates. What is peer-review? Why does it matter? What is the difference between Google and the library? How does Google decide what to show you? Summon? Why isn't the stuff in Summon in Google?’

However, Coco does note that the trade-off between Summon and other specialist or research based online databases, such as Web of Science, is noticeable in terms of ‘narrowing a search for your needle to its haystacks’, but that this can be alleviated by an effective search strategy.

Refining searches

Users who refined their search did so by using the facet options. The comments imply that those that did, found it an easy process; one user commented that they used ‘+’ and ‘-’ as they did on Google, while others used Boolean operators to refine the search. Most of those who did not choose to refine their search in this way said it was because they had found what they wanted without having to do so; there were one or two comments where users did not know that they could do this.

“I had 7,000 results that I couldn’t narrow down which I found quite annoying” (Huddersfield)

Success in finding references

Most respondents at both institutions said they were successful in finding what they wanted; some comments indicated that they found more than they expected:

“I looked at an area I am working on for my MSc so I already had an idea what I might find based on previous research. I was very impressed that Summon found some relevant articles from the last few years that I had not seen before. “ (Northumbria)

Some were more pragmatic:

“some useful, some not so useful ...it’s the same with any search. The more you refine it, the more relevant your results will be” (Huddersfield)

Different users had different expectations and some were confused by the one stop search concept:

“it seems rather odd to request “limit to articles from scholarly publications” ... if something has a non-scholarly source we can use other tools (e.g. Google, newspaper CDRoms) to find them” (Northumbria)

Layout of results

The majority of respondents at both institutions stated the layout of results were clear, citing the facets and the ability to preview the abstract as particularly useful. Negative comments related to too many results and not being able to distinguish between different types of results e.g. article, book, review article, newspaper article. Some found it hard to identify the source of the material. These comments related both to not knowing which specific databases were being searched or the clarity of the journal title / citation display on the Summon page.

Relevance of results

Over 80% at both institutions agreed that results were relevant to their research topic and that they had found what they were looking for. There were many positive comments about relevance, with an acknowledgement that the search strategy had to be good to begin with and that results could be refined using the facets and filters provided.

Comparison with usual search starting point

At both institutions in around 50% of cases this was Google, but a minority of users cited specific subject or A & I databases. Over 80% at Northumbria found Summon better than their usual normal starting point:

"While Google Scholar is sometimes useful you don't have the option to refine your search often bringing up results from just the US ... Nora brings up more relevant information and even spell checks your searches" (Northumbria)

Advanced search

Those who used the advanced search at both institutions found it easy to use with the right amount of options available. However, over half did not use the Advanced search at all; it is not clear whether this is because they felt it was unnecessary to do so or if they did not realise this feature was available.

Features users would like to see

Many of the responses to this question from both institutions referred to options that were already available, which clearly has implications for training and refining help pages, e.g. reducing or increasing the number of references displayed on a page; saving the references; Boolean searching (though this is currently not available in Advanced Search); limiting the search to full text resources.

Other suggestions included facility to search within the results to further refine a subset of references; 'back button' ; a list of the most popular resources accessed; subject tab. The request for a 'subject tab' so that users could specify a subject area before beginning their search was quite common, and somewhat ironic given that this was regarded as a weakness of federated search as users were not sure which subject they should choose - or wanted to search more than one subject area at a time. It is likely that people saw this as a way of limiting their search results rather than using the filters and facets within Summon to do so.

Features users liked best

"Ease of use" and "simplicity" ranked highly as the best features at Huddersfield and Northumbria. One user found Summon "incredibly simple to use, seems much faster to access journals / articles", while another liked "the fact that it brings all the different parts of the library into a Google-like search option". (Huddersfield). The full text icon was also popular:

"...the pictures of FULL TEXT were great as I knew which ones to use." (Northumbria)

Features users liked least

About 25% of respondents at both institutions stated that there was nothing that they did not like. Different users demonstrated different perspectives e.g. one commented that "it's still not a Google box", while another disliked it because of "its Google-like operationality" (Huddersfield). Some comments were also received about the order of results and that Summon did not list the results on the initial screen by type, e.g. article, book, book review etc.

Some users did not like having to wait for filters to take effect one by one – they wanted to be able to select all the relevant filters at once to obtain a smaller more relevant results set more quickly; and also to save the same preferences for all their searches (e.g. scholarly and peer reviewed material only, full text only). Although it is possible to keep the same search refinements in one search session, users would like to save these preferences for future search sessions.

In conclusion, the survey feedback on Summon was very positive, particularly in relation to speed and ease of searching. Some of the frustrations relate to either the need to improve search strategies or difficulties linking to full text. There was a common theme of wanting to search a specific database or pre selecting a subject area before searching. However, it is interesting to note that attitudes to a service like Summon can differ as the two directly opposite comments reveal:

" ... I think it would have a very negative effect on students' ability to access electronic and other library resources. Students need to be made aware that certain resources are appropriate for certain tasks; this mode of presentation presents book reviews on the same level as books, ... newspaper articles on the same level as current scholarly articles. This will tend to direct students towards the wrong kinds of resources ... (Northumbria)

and

" A powerful but easy-to-use and above all fast search engine for peer-reviewed work is exactly what I want. I really have no desire to be an expert on a dozen different ... database interfaces as I currently have to be. I love the Summon single search box as I can feel confident in asking "Give me some good and recent suggestions for this subject" and know I will get a good result. However underneath it there's still the ability to refine and rework the search as I need to ... - "
(Northumbria)

Focus groups with students

Small groups of students were invited to focus groups and were given sheets with screen shots and thought bubbles on which to record their opinions as they used Summon without any assistance. Staff observed and recorded how they used the service. After thirty minutes staff then questioned users, recording this as an MP3 file. The questions echoed the online survey, and focussed on ease of use, relevance of results, most and least popular features and how they thought Summon compared to other search engines. Again the response was very positive and students generally found it very easy to use without instruction.

Features students liked were:

- Facility to see immediately which articles are available in full text
- Preview of abstract before linking to full text
- Speed of returning results
- Facility to refine searches easily
- Ease of saving and exporting references to Endnote
- 'Did you mean' function to correct spelling mistakes
- Layout and appearance

The queries and suggestions for improvement were: wanting to know which database results came from, how to access individual databases and confusion over multiple pages opening when linking to full text.

Staff observing focus groups noted that some students took a while to notice and use the facets to refine their search; and the standard message from 360 Link about what to do about missing content prompted some users to close down the window instead of waiting for the information to load. This message was subsequently amended.

Feedback from Library staff

Feedback from Library staff was obtained through focus groups and training. The positive comments were largely the same as those with students, i.e. ease of use, speed of searching, clear identification of full-text material, easy refinement of results using the facets, simple layout and links to the library catalogue.

However, Library staff wanted to know more about how the service actually worked, e.g. how subject terms are generated, Boolean searching, and limiting search to the abstract field. Linking and coverage were also concerns and are discussed below.

Marketing and training

At Huddersfield, the Serials Solutions Summon branding and name was retained and the service was marketed as a new kind of search. At Northumbria, the internally well known NORA (broadly Northumbria Online Resource Access) brand was retained and called NORA Power Search, and the new system was marketed as an upgrade to the existing service, albeit a 'next generation' search. A comprehensive marketing campaign (see figures 4 and 5), with posters, flyers, emails, Library and University bulletins, press releases, twitter feeds and drop in training sessions was organised by both Libraries.

[Insert Figure 4. NORA Power Search poster]

Although Summon is intuitive to first-time users, significant time was invested in creating introductory guides and leaflets to ensure that staff and students could use it to best effect and user guides and flyers continue to be updated as new functionality is developed.

[Insert Figure 5 Summon banners at Huddersfield]

Key points for effective practice

The following are some key points and lessons learned to consider when planning the implementation of Summon and which may impact on project planning and timescales for implementation.

Catalogue records

Records not created to standard cataloguing rules may cause problems so these may need work beforehand and editing these may impact significantly on project timescales.

Ingesting data from local sources

If you are the first library using your ILS to implement Summon build into your schedule time for slippage in this area in case things take longer than anticipated. The Summon listserv and wiki⁵ are valuable tools for contacting other institutions and sharing expertise.

Linking to full text and indexing issues

Much of the success of Summon relies upon how effectively you can link from it to the full-text material to which you subscribe. Summon does a great job finding results but if users are unable to connect to these smoothly then one of the main frustrations of federated searching is replicated. Take time to ensure the set up of your link resolver is as good as it can be. Serials Solutions have themselves recognised this and have worked with publishers to set up direct links into their content rather than relying on OpenURL technology.

Indexing problems may be caused by incorrect or misleading data supplied by publishers being ingested into Summon index which then causes problems when trying to connect to full-text. These queries can be time-consuming and complex to unpick and involve contacting Serials Solutions and often the publisher and provider of the metadata, but seem to be an inevitable consequence of this work.

De-duplication of references

Although Serials Solutions normalise the content they ingest to avoid duplication of records there are still some issues that require further refinements. Duplication can cause some confusion for users and library staff e.g. duplication of records included in a research repository with subscribed journal articles.

“Discovery service” concept

The concept of the product as a discovery service was difficult to convey to some users, including Library staff. Although content coverage may not be comprehensive in some areas Summon helps users find content that they may not have previously discovered precisely because there is no pre-selection of subject area or databases. Summon is one element of a search strategy that should also include searching individual subject databases where appropriate. Nonetheless some Library staff, notably in Law, saw the potential of Summon for supplementing the information that users would find in specialist databases.

Concern about loss of subject databases

Some Library staff were also concerned about users not being aware of the high quality databases and journal articles which were not indexed in Summon; and also the sophisticated interfaces supplied by some specialist databases and journals. There were also worries that the use of these would fall dramatically and eventually be cancelled because of low usage statistics. In fact this has not been the case and there have been large increases in the use of full-text sources as Summon makes more material more easily discoverable.

Coverage

Coverage is a major concern for subject librarians. They want to be very certain about which subject material is included in the Summon index. Although Serials Solutions provided an analysis of journal title coverage and estimated that over 85% of subscribed journal content was being indexed, subject librarians want to know what percentage of databases in their subject

area is indexed and what gaps there are. This has recently been acknowledged by Serials Solutions who now make this information freely available from their website².

Launch of new developments and functionality

During the implementation period and immediately afterwards many new developments and functionality were implemented, most of which were well received. However, they were sometimes rolled out very quickly without much notice to customers who had no opportunity to try them in a non public test environment or to update colleagues and documentation. In some cases the developments were inappropriate to some institutions – e.g. the authentication banner– but were switched on regardless and had to be hastily removed to avoid confusing users. This has now been addressed by Serials Solutions through a regular fortnightly updating schedule, for which a few days notice is given, allowing at least some time for customers to inform Serials Solutions of their wish to opt out of developments if required.

Summon list serv and wiki

There is a very useful and active Summon listserv. As well as raising queries or suggestions directly through the Serials Solutions Client Centre, this is an excellent facility for communicating and exchanging experience with other customers (or even just lurking). It is actively monitored by Serials Solutions staff who also contribute to discussions or give general advice. A wiki has also been developed by the User Group where customers share information and practice.

Training

Summon is a deceptively easy to use product and most people can use it without any training. However, it also has rich functionality that may not be evident from using the single search box so there is still a need to educate both users and Library staff to make the most effective use of it. This has issues for training both staff and users. For example, Advanced search can be used in a quite sophisticated way to specify search criteria, whether looking for a specific article in a specific journal.

Recommendations for future developments

Personalisation

Users can save results into a temporary folder in order to export, e-mail or print them. These are cleared when the user leaves the Summon search session. In common with other electronic resources it would be good to be able to personalise Summon so that these search strategies (including preferred filters for full text or scholarly resources only), results and alerts could be saved more permanently. Due to the fact that no login is required to search Summon this is not currently possible. The use of scoped searches is an alternative whereby users can search a limited subject set if preferred.

Timeliness of adding new content

Serials Solutions are constantly acquiring new content for Summon. However, there can be a significant delay between acquiring the content and making it available to customers via the 360 KnowledgeBase. Whilst this is understandable given the vast amount of content to be added, there is a lack of clarity about the planned availability date of this content. This may of course depend on the complexity of the data acquired and the time needed to process it; however, a degree of transparency in this matter would help customers manage user expectations.

Likewise, it is essential that new issues of journal content are added as quickly as possible, and customers advised of any significant delay. Users expect new content to be available immediately and to keep pace with native interfaces.

Development of a non-public test environment

We have alluded above to the frequent development of new functionality in Summon, which while mostly very welcome may not always be appropriate for all customers. It would be useful for customers to have their own private test environment to try out new functionality. There is a central Serials Solutions test area that customers can look at but this is not the same as testing with your own local data.

Conclusion

Testing and feedback to date tells us there is no doubt that Summon has been well received at both Universities and as a way of simplifying access to information resources and it goes a long way to addressing the Google challenge. Most users appreciate the speed and simplicity of searching, which brings together both print and electronic materials in a single search and many also found that by using Summon they could get results from sources they had not previously considered using. Early indications show that COUNTER⁷ JR1 and JR1a reports show a rise of as much as 400% for many journal subscriptions since the launch of Summon, conversely, DB1 reports show a major drop for online A&I databases.

Summon is an addition, not a substitute, for access to native resources. As Summon continues to mature a number of similar competitor products have also been developed. It will be interesting to see how these products compare when both Universities come to the end of their current contracts in 2012.

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Notes

1. Capita Libraries: <http://www.capita-software.co.uk/software/pages/libraries.aspx>
2. Summon: content and coverage:
<http://www.serialssolutions.com/discovery/summon/content-and-coverage/>
3. Electronic Resources List: http://library.hud.ac.uk/wiki/Main_Page
4. A-Z list of databases at Northumbria University Library:
<http://northumbria.libguides.com/start>
5. Summon Community Wiki. Widgets and API gallery:
http://community.summon.serialssolutions.com/index.php/Main_Page#Widgets_and_API_Gallery
6. University of Huddersfield MyReading Project blog:
<http://library.hud.ac.uk/blogs/projects/myreading/>
7. COUNTER: <http://www.projectcounter.org/>