Searching life, the universe and everything?
The implementation of Summon at the
University of Huddersfield

Graham Stone
E-resources Manager

http://eprints.hud.ac.uk/7155/
#summon4hn
#liber2010
University of Huddersfield

- Strong ethos of widening participation
- 24,000 students (16,000 FTE); 7,500 p/t
- 57% female; 68% mature; 19% declared non-white
- Broad spread of courses
- New international focus
- New focus on research

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Key aims

- Rationale behind the e-resources review
- Challenges encountered and issues raised during the technical implementation
- Feedback and evaluation
- Information literacy strategy
- Future enhancements
“Why is Google so easy and the library so hard?”
[Duddy, 2009]

“Why do we want to teach our users to be librarians?”
[Pattern, 2009]
• **Working group established January 2009**
  
  – to evaluate the marketplace and to ascertain whether there were any systems that could “…provide ease of searching and access for the user, whilst reducing the workload for systems and technical services, and remaining within budget levels”
  
  – make recommendations for further provision, e.g. for the next 5 years, taking into account system interoperability and future-proofing”.
Vision

1. A first class search engine
   - capable of returning relevant, accurate results and provide a Google-like experience for users

2. The ‘one-stop-shop’
   - a single interface was required for users to be able to access ALL library resources via a single search

3. Improved value for money
   - for purchase and ongoing maintenance costs
   - while significantly reducing administration costs for library staff

4. Improved system management
   - to provide ‘back-end’ system management by being interoperable and running on open standards

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Evaluation

• Vision expanded into an evaluation document
• A number of suppliers were invited to give 45-minute demonstrations
• Rated the vision
• May 2009: report to Library Management Group
• June 2009: OJEU tender
University of Huddersfield is UK’s First Commercial Adoption of the Summon™ Service

Web-scale discovery for academic research continues global expansion

Serials Solutions, a business unit of ProQuest, announced at the International Federation of Library Associations (IFLA) Conference that University of Huddersfield is the site of the first commercial adoption of the Summon™ web-scale discovery service in the UK. The university library will use the service to enable single-search access to its collections, by integrating searches of online databases, along with the local catalogue, repository and archival collections. Users will be able to refine the results of their search by date, subject area and format.

Professor John Lancaster, Director of Computing and Library Services at University of Huddersfield, in discussion with Eileen Hillier, Technical Services Manager, stated: “This is the transformational technology which has long been needed to meet student and academic staff expectations in an increasingly complex information environment. It will provide a simple-to-use tool for accessing the wide range of scholarly collections available to users of our library and information service.”

“ Summon ticks all the boxes,” added David Patern, Library Systems Manager at University of Huddersfield. Renowned for his innovation to the library catalogue, Mr. Patern deemed a “wish list” of attributes for a new search engine. “I was immediately attracted to the simplicity of the Summon search experience, but also found it fulfilled all of the technical requirements in our technical specification.”

The University of Huddersfield joins a variety of early adopters at universities throughout the U.S. and Australia in pioneering the world’s first and only web-scale discovery service. These university libraries will use the Summon™ service to enable single search-box access to the breadth of their collections—digital and print, audio and video, single articles to entire e-journals, and every format in between.
<table>
<thead>
<tr>
<th>Project plan</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract signed</td>
<td>Aug 2009</td>
</tr>
<tr>
<td>Implementation starts</td>
<td>Sep 2009</td>
</tr>
<tr>
<td>Summon instance delivered</td>
<td>Oct 2009</td>
</tr>
<tr>
<td>New journals A-Z list goes live</td>
<td>Feb 2010</td>
</tr>
<tr>
<td>360 Link replaced SFX</td>
<td>Feb 2010</td>
</tr>
<tr>
<td>E-resources wiki to go live</td>
<td>Mar 2010</td>
</tr>
<tr>
<td>Launch at Research Festival (beta alongside MetaLib)</td>
<td>Mar 2010</td>
</tr>
<tr>
<td>Summon to replace MetaLib</td>
<td>Aug 2010</td>
</tr>
</tbody>
</table>
Implementation

- Conference call with United States staff
- MARC21 mapping spreadsheet returned
  - Default settings
- 360 training
- 6 week installation
  - Branding etc.
- Separated all print and e-journal MARC records
- Previously merged e-book/monograph records were split
- Initial upload did not include:
  - E-books, e-journals, fast adds, temporary ILL records, records that were on order or unavailable
- Issues with deletions
Rogue cataloguing!

• Summon highlights bad cataloguing!
  – Music scores
  – DVDs
  – Copy cataloguing

http://www.flickr.com/photos/ohiouniversitylibraries/3513453431/
http://www.flickr.com/photos/benchilada/2878939636/
Data population

- 360 Core used to populate subscribed resources
- Original plan to use SFX with Summon until July 2010
- Move to 360 Link in the summer
  - Minimal disruption
  - Moving from EBSCO to Swets subscription agents at same time!
- January 2010 Summon Implementation Group chose to move to 360 Link immediately

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Other resources

- University Repository
- Streaming video of off-air recordings
LESSONS LEARNED
Easily discover the world of library content

Take Summon for a test drive today and please give us your comments!

complete the Summon Survey for a chance to win £10 printing/photocopying credit

Tip: Found a good search? Subscribe to the RSS feed to be alerted when new results are added to Summon.

Help and Support
Useful links:
- What is Summon?
- A to Z List of Journals
- A to Z List of Electronic Resources
- Electronic Resources Blog - Tips for using Summon
- Electronic Resources Blog - Summon News

Current issues:
- XpertHR access problems (14/Jul/2010)
  We are currently experiencing problems with access to XpertHR. The suppliers have been contacted. If you have any queries regarding this please email e.mailbox@hud.ac.uk
Results for journal search in Summon

Refine your search
- Items with full text online
- Limit to articles from scholarly publications, including peer-review
- Exclude Newspaper Articles
- Add results beyond your library’s collection

Content Type
- Any
- Journal Article (56,465)
- Newspaper Article (1,250)
- Trade Publication Article (155)
- Journal (16)
- Book (7)
- Book Review (6)

Search Results: Your search for Journal of criminal justice returned 57,839 results

Journal of criminal justice
ISSN: 0047-2352
Subjects: Law, General & Comparative, Criminology, Penology & Juvenile Delinquency
Call Num: JOURNAL

Availability: available, format: electronic only

Criminal victimization in South Korea: A multilevel approach
Authors: Sunghoon Roh, Eunyoung Kim, Minwoo Yun
Journal of Criminal Justice Vol: 38 Issue: 3 ISSN: 0047-2352 Date: 05/2010 Start Page: 301
Subjects: Studies, Correlation analysis, Victims of crime, Criminology, Models
A growing number of studies in criminal victimization had integrated the individual model and the context model to examine the dynamics or influences from...

Availability: Full Text Online
Electronic Resources Wiki

Electronic Resources List

Main Page

Electronic Resources by Subject
To find relevant resources for course, select your school...

- Applied Sciences
- Art, Design and Architecture
- Business
- Computing and Engineering
- Education
- Human and Health Sciences
- Music, Humanities and Media

Electronic Resources List A-Z
Are you looking for information about a specific resource? If so, click on the first letter of its title...

- 0-9 | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Lastest News
Current Issues:
- XpertHR access problems @ (14/Jan/2010)
  We are currently experiencing problems with access to XpertHR. The suppliers have been contacted. If you have any queries regarding this please email e.mailbox@hud.ac.uk
- Spassweb 2.7 upgrade @ (14/Jan/2010)
  SFESWeb services will not be available on Tuesday, June 15 2010 due to an upgrade. We apologise for any inconvenience.
Search Results: Your search for cinahl returned 4,936 results

**Recommendation:** We found a specialized collection that might help you...

**CINahl**

The Cumulative Index to Nursing and Allied Health Literature

**CINAH**

*Availability:* Check Availability

Web Resource
CINAHL

Introduction

CINAHL provides access to journal articles on Nursing and any of the other professions allied to health.

Access Links

- search.epnet.com/login.aspx?authtype=ip...& (University network login required)

Help Sheets

- CINAHL.pdf

EndNote

- Selected references can be automatically exported into an EndNote library. (more details)

Subject Categories

- Health
- Midwifery
- Nursing
- Occupational Therapy
• Launched on 10 March 2010 as part of the University Research Festival
• Start of the Marketing Strategy
### Marketing strategy

<table>
<thead>
<tr>
<th>Work Package</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interface</td>
<td>To promote Summon front page and make necessary interface changes</td>
</tr>
<tr>
<td>Publicity</td>
<td>To disseminate promotional material throughout the University</td>
</tr>
<tr>
<td>Evaluation and Feedback</td>
<td>Ensure Summon is fit for purpose by launch</td>
</tr>
<tr>
<td>CLS Staff training</td>
<td>To ensure full training across service</td>
</tr>
<tr>
<td>User training</td>
<td>To ensure relevant stakeholders are offered training</td>
</tr>
</tbody>
</table>

- A successful publicity campaign and subsequent user evaluation and training were key factors in the transition between MetaLib and Summon.
Simplifying resource discovery and access in academic libraries

- JISC Call: Enhancing library management systems – Theme A – Use of new resource discovery interfaces
  - [http://www.jisc.ac.uk/fundingopportunities/funding_calls/2009/12/1209lms.aspx](http://www.jisc.ac.uk/fundingopportunities/funding_calls/2009/12/1209lms.aspx)
- 6 month project from April to October 2010
- Joint case study of the implementation, evaluation and launch of Summon at Huddersfield and Northumbria
- Project blog: [http://library.hud.ac.uk/blogs/summon4hn/](http://library.hud.ac.uk/blogs/summon4hn/)
- Twitter hashtags: #summon4hn #jisclms
Free lunch and chance to win iPod?! Then come to Summon Focus Group happening every day w/c 07/06/10. Email m.l.philip@hud.ac.uk to register 1,275,862,077,000.00 via TwitterBar

**Tip:** Found a good search? Subscribe to the RSS feed to be alerted when new results are added to Summon.

**The End is Nigh ...for MetaLib**

Posted by Dave Pattern on June 8th, 2010

As announced previously, Summon will officially replace MetaLib at the end of July. So, to help you plan for the switchover..

[http://www.youtube.com/watch?v=myVyP4jC9m8](http://www.youtube.com/watch?v=myVyP4jC9m8)
• ‘Using Summon is as easy as 1-2-3…’
  1. Enter search term(s) into the search box
  2. Refine the results by choices such as date, subject, academic journals and other options
  3. View results and click to follow link to full text

http://library.hud.ac.uk/summon
User evaluation

- Online questionnaire
- Focus groups
Questionnaire results (1)

% distribution of survey replies

% distribution of school responses

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Questionnaire results (2)

How easy are the screens to understand?  Was the layout of the results clear?

- Very easy: 44%
- Easy: 23%
- Quite easy: 23%
- Quite difficult: 5%
- Difficult: 3%
- Very difficult: 2%

- Yes: 89%
- No: 11%
Questionnaire results (3)

Were the results relevant to your research topic?

Did you find what you were looking for?

- **Yes**: 84%
  - **No**: 16%

- **Yes**: 77%
  - **No**: 23%
Focus groups

• Planned in liaison with Northumbria University
• Lunchtime sessions:
  – Introduction
  – Hands on session with observation
  – Group discussion and lunch!
• Using open sessions from questionnaire and Dartmouth College
• Early indications show that ease of use features highly
Training

• Library staff
  – ‘Ask a Librarian’ desk awareness session
  – In-depth training of all staff during June/July
  – Refreshers sessions planned for September

———– Internal Summon blog

http://www.flickr.com/photos/ubclibrary/4029805239/

Inspiriting tomorrow’s professionals
• Marketing Summon as *the* new discovery tool for the coming academic year
  – Get ahead for next year by previewing Summon
  – Summon is as easy to use as Google Scholar, but better in that full text can be linked to straightaway
  – Summon is topic based rather than resource based
  – 3 steps; search, review results, view abstract/full text
  – Keywords are crucial
  – A-Z lists are still available
  – Feedback is important
Academic staff

• Quite apprehensive
• One to one sessions offered

What's the Beta version?
• The link takes you to a work in progress ... enhancements are being added every day, for example, we will soon be adding details of the collections held by the University Archives to Summon.

Take Summon for a test drive and give us your feedback!
• Please give us your feedback, and encourage your students to do the same, so that we can continue to improve and refine the product before it completely replaces MetaLib in the summer.

Why replace MetaLib?
• MetaLib is only a platform by which we access subject databases and resources like DataDirect and electronic journals. Summon offers a much simpler and attractive way for students to search for information and we hope it will result in greater usage of the library's electronic content.
• The Beta version of Summon will sit alongside MetaLib on the Portal and Blackboard so that it can be tested by staff and students.

Will it have an impact on teaching and learning?
• Yes, and hopefully for the better! Summon will entirely replace MetaLib by September so academic staff will need to update any course materials that refer to MetaLib for the start of the academic year 2010-2011. Everyone is advised to export any saved items from MyMetaLib and links to articles on Blackboard will be unaffected.

What if I want to access an individual database in the same way that I did with MetaLib?
• Access to individual databases will soon be available via Summon.

Does Summon work with EndNote and Zotero?
• Yes it does – just remember to export your results before you close the Summon window!
• And let us know if Summon doesn't perform in the way that you would expect!

Where can I find out more?
• Contact your library subject team of librarians at http://www2.hud.ac.uk/ds/library/subjects/ to find out about formal and informal training opportunities and resources for staff and students.
• The very nature of the ways users search will be turned on its head
  – from searching databases that include ALL content and then hoping that the abstracts chosen will hold the full text, to searching the full text subscribed material first and then widening the search if necessary.
  – Will take time to move users from choosing a database to search to using Summon as a one-stop-shop.
Information strategy

- Summon will radically change the way information literacy sessions are taught
  - Subject teams will no longer have to concentrate their efforts on showing users the correct databases to search
  - They can teach users the correct way to search, a return to information literacy
- It is also hoped that the simplicity of Summon will address the issue of low/non use of library resources
Product development

- Statistics
  - We need COUNTER statistics

- Personalisation
  - Results would depend on user, e.g. 1st year psychology student
  - Google is both fast and allows personalisation

- Saving items
  - The ability to save searches and results within Summon is highly desirable for users, simply because they are used to this with others electronic resources

- Library Catalogue
  - Can Summon replace the public catalogue?

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# Availability of new resources within Summon

## Database Title List Updates

**NOTE:** The table below shows the date that each title list within the ADAT site was last updated by the relevant database provider. Please visit our About ADAT page for more information on our data sourcing and comparison method.

<table>
<thead>
<tr>
<th>Bibliographic Databases</th>
<th>Provider</th>
<th>Chased</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Education Index</td>
<td>BEI</td>
<td>Jun 2010</td>
<td>18 Dec 2009</td>
</tr>
<tr>
<td>British Humanities Index (BHI)</td>
<td>ProQuest</td>
<td>Jun 2010</td>
<td>14 Oct 2008</td>
</tr>
<tr>
<td>Cambridge Compendex</td>
<td>Elsevier</td>
<td>Jun 2010</td>
<td>04 Nov 2009</td>
</tr>
<tr>
<td>EMBASE</td>
<td>Elsevier</td>
<td>Jun 2010</td>
<td>29 Sep 2009</td>
</tr>
<tr>
<td>EconLit</td>
<td>AEA</td>
<td>Jun 2010</td>
<td>22 Feb 2010</td>
</tr>
<tr>
<td>GEDBASE</td>
<td>Elsevier</td>
<td>Jun 2010</td>
<td>04 Nov 2009</td>
</tr>
<tr>
<td>Inspac</td>
<td>Inspec</td>
<td>Jun 2010</td>
<td>12 Nov 2009</td>
</tr>
<tr>
<td>International Bibliography of the Social Sciences (IBSS)</td>
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<td>16 Oct 2009</td>
</tr>
<tr>
<td>MLA International Bibliography</td>
<td>MLA</td>
<td>Jun 2010</td>
<td>22 Jan 2010</td>
</tr>
<tr>
<td>Scopus</td>
<td>Elsevier</td>
<td>Jun 2010</td>
<td>14 Sep 2009</td>
</tr>
<tr>
<td>Web of Science</td>
<td>Thomson</td>
<td>Jun 2010</td>
<td>19 May 2010</td>
</tr>
<tr>
<td>Zetoc</td>
<td>Zetoc</td>
<td>Jun 2010</td>
<td>26 Jan 2009</td>
</tr>
</tbody>
</table>

### Key
- Green: Updated in the last 6 months
- Yellow: Updated in the last year
- Red: Updated over a year ago

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**JISC Academic Database Assessment Tool (ADAT)**
http://www.jisc-adat.com/adat/home.pl

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Updates of existing material
Looking forward

• Summon launches end of July 2010
  – ≈53m items
    • 34m+ journal articles
      – 16m+ peer reviewed articles
    • 60,000+ journals
      – Print, electronic and open access
    • All print material held in the libraries
    • 85,000+ E-books
      – 75,000 still to add
    • University Repository
    • UniTube Off-Air Recordings

• Another E-resources review in 2012?

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Acknowledgements

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Thank you

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