

USING SUMMON TO TEACH HISTORICAL PRIMARY SOURCES: THE GOOD, THE BAD, AND THE UGLY

CAROL A. SINGER AND STEPHEN M. CHARTER

INTRODUCTION

The use of a discovery layer, such as *Summon*, transforms the process of identifying and accessing library resources, including archival, published, and virtual historical primary sources. The content of a discovery layer database is not identical with the sum of the online catalog plus the various databases to which the library subscribes. Additionally, some kinds of historical primary sources, or their finding aids, may not be included. Even when virtual resources are included in the discovery layer database, reliable access to full text may not be easily available. However, some virtual resources which were not previously accessible through library databases may now be easily discoverable and accessible through the discovery layer. In addition, the resources that are searchable in the discovery layer database may be much more likely to be discovered by a researcher since they are no longer sequestered in a specialized database.

The Bowling Green State University Libraries made *Summon* publicly available to researchers during the summer of 2011. Prior to that time, substantial efforts had been made to ensure that all possible resources provided by the Libraries were included in the *Summon* database. At that time, the Library staff estimated that eighty-five percent of the Library's resources were accessible through *Summon*. However, the remaining fifteen percent included some of the historical primary sources to which BGSU had access. Because *Summon* became the default

search engine on the Libraries' home page, it was imperative to find ways to teach students how to identify and, when resources were full text online, access historical primary sources, whether they were available or not in the *Summon* database.

It's important to remember that each library's *Summon* installation will be unique to that institution. In addition, the Serials Solutions staff is very responsive to library requests for changes, is always trying to improve the search experience, and is constantly trying to add new resources to the *Summon* database. The result is a constantly changing search experience, which can create teaching challenges. All examples in this article demonstrate how historical primary sources were identified and accessed at BGSU at the time this article was written.

USING *SUMMON* TO DISCOVER AND ACCESS ARCHIVAL RESOURCES

The advantage of using *Summon* to access historical archival resources is that only one basic search is needed to tap into diverse, fairly comprehensive content from one's own library collections, as well as content from other outside institutions. When conducting a search, the results often lead to descriptive archival collection finding aids or inventories that include digital images of historical documents and photographs. Transcripts of pertinent letters or diaries are sometime accessible. Other search results might lead directly to digital images of documents.

One disadvantage of using *Summon* is that the researcher cannot initially limit the basic search to content type, such as archival material or manuscripts; this must be done using post-limit features. The advance search option, however, allows one to do so. Another disadvantage of using *Summon* is that sometimes descriptive archival collection finding aids

Singer (Reference & Instruction Librarian) and
Charter (Head, Center for Archival Collections)
Bowling Green State University [Bowling Green, OH]

or inventories are not available online or the links to them do not work. The unfortunate, ugly side of *Summon*, as with many very large databases, is that search results may include a large number of irrelevant results.

TEACHING TECHNIQUES TO MAXIMIZE DISCOVERING ARCHIVAL RESOURCES

When teaching *Summon* to access archival resources, the teacher must impress upon the researcher to be specific in their searches, limiting the content type to archival material or manuscripts.

For example, an initial *Summon* search for the 21st Ohio Volunteer Infantry, without limits, includes 45,256 results, including many that were irrelevant. Several digital copies of the regimental history, government documents, newspaper articles, archival materials and manuscripts do appear among the results. Limiting the search to archival material and manuscripts returns just 28 sources, most of which include links to descriptive finding aids or inventories with digital images and transcripts. All collections are available at BGSU University Libraries' Center for Archival Collections (CAC), including the *William J. Sullivan Collection/21st Regiment Ohio Volunteer Infantry Records*. The Records include original muster rolls, lists, reports, correspondence and official orders.

When results of a *Summon* search are limited, the librarian must teach students to expand the search outside the library's collection. A search for the Battle of Gettysburg returns 112,442 results. No archival material or manuscripts appear on the list, but newspaper articles and government documents were included. Expanding the search beyond the library's collections returned both archival material (49) and manuscripts (5). Results included, among other resources, digital images of original letters.

Students should be taught how to directly access local archival resources, especially if search results are limited. The CAC website includes a "Search Our Site" feature. A search for the Battle of Gettysburg returns five relevant manuscript collections and several index references to Northwest Ohio newspaper articles. All indexed newspapers are available on microfilm at the CAC.

Teaching students to formulate effective *Summon* search strategies to discover and access archival resources is the key to their research success.

USING *SUMMON* TO DISCOVER AND ACCESS PRINT HISTORICAL RESOURCES

In most cases, the print resources that are taught to students consist primarily of materials in the library's collection and, when appropriate, an explanation of how to identify materials in other libraries and then how to use interlibrary loan or consortial borrowing to acquire these resources. The contents of the library catalog are included in the *Summon* database, so students can be taught to use *Summon* to identify print resources in the library. However, because many library catalogs offer

methods of limiting and searching that are not available in *Summon*, the librarian may also choose to teach students how to use the library catalog to find materials. Another reason to teach students how to search the library catalog is that records in the *Summon* database may not be as complete as those in the catalog. One major omission is the table of contents listed in many library catalogs, so that a *Summon* search will not identify an essay or chapter within a book.

A library might own paper indexes or bibliographies that are still used to identify print journal or newspaper articles. Of course, the contents of these print finding aids are not included in the *Summon* database. However, not all databases that index articles in print sources are included in the *Summon* database either because some publishers and database providers have not signed contracts with Serials Solutions, the producer of *Summon*. Therefore, the resources from these companies are not in the *Summon* database, although this can change at any time as new contracts are signed.

TEACHING TECHNIQUES TO MAXIMIZE DISCOVERING PRINT RESOURCES

Students can be shown how to identify print resources in the library's collection by doing a *Summon* basic search and then limiting to items that are in the library catalog, are books/ebooks, and are located in a particular library. Search results can also be limited to those published between particular dates or years. Students can also be taught to use the Advanced Search, that allows the researcher to search for works by a particular person or organization, or to pre-limit by items in the library catalog, of a content type such as books/ebooks, or were published between particular dates or years. The post-limits for the results of a Basic Search are also available for the results of an Advanced Search.

Students should be taught that *Summon* is particularly useful for known item searches. Because this is such a large, varied database, a *Summon* search can maximize the chances of finding a title. To find the *Proceedings of the White House Conference on Children in a Democracy*, held in 1940, a BGSU *Summon* search identifies the print copies in the government documents collection and the Center for Archival Collections, and two search-only digital copies in the *HathiTrust Digital Library*. *Summon* isn't as satisfactory for identifying parts of print sources, such as essays or chapters, so students should be advised to also search for these in the library catalog, if the catalog includes tables of contents.

When appropriate, students should also be taught to search print indexes and databases for materials that aren't included in the *Summon* database. For instance, the H.W. Wilson database, *Readers' Guide Retrospective*, isn't included in the *Summon* database. Although this database includes very little full text, the BGSU Libraries own print copies of many of the periodicals included in the database, making it an invaluable resource for identifying periodical articles published in the middle of the twentieth century. A *Summon* search for articles written about Harry Truman during his presidency will

find articles from the *New York Times Historical* and *JSTOR* databases, but not articles from popular news magazines of the period, such as *Newsweek*, *Life*, or *Time*, which are indexed in the *Readers' Guide Retrospective* database and available in paper and/or microform in the BGSU Libraries.

USING *SUMMON* TO DISCOVER AND ACCESS VIRTUAL HISTORICAL RESOURCES

Summon usually makes virtual historical resources easily accessible when the materials are part of the *Summon* database. The ability to search across a wide variety of online resources, irrespective of the origin of these resources, is one of the primary strengths of *Summon*. Of course, *Summon* doesn't provide the specialized search capabilities that some databases of digitized historical resources provide, but *Summon* has its own search limit capabilities and these are displayed very conveniently on the results screen, easy for students to see and use. In addition, depending on the open source resources chosen by the library, the *Summon* database may include Internet historical resources that were not in either the library catalog or in any of the databases provided by the library.

Unfortunately, some databases of full text historical resources aren't included in the *Summon* database, so those must be searched separately. Other databases are in the *Summon* database, but don't work well with the link resolver so that a searcher can't get easily to the full text or, in some cases, even to the citation for the resource. Some databases may be in the *Summon* database, but the resources in the database aren't full text searchable within *Summon* and, therefore, can't be fully utilized except through the database's own search engine.

TEACHING TECHNIQUES TO MAXIMIZE DISCOVERING AND ACCESSING VIRTUAL RESOURCES

Some of the digitized historical resources in *Summon* work so well with the database that they are easily identified and accessed. For instance, *Accessible Archives*, which contains several colonial newspapers, works beautifully with *Summon* and can be used to highlight some of the searching and limiting features available in *Summon*. A search for "redemptioner OR indenture*" limited to newspaper articles published between 1700 and 1800, will retrieve articles about indentured servants. If the limit to newspaper articles is removed, the students can then see results from open access sources such as the *HathiTrust Digital Library*.

Because the *Summon* database includes such a broad range of resource types, students can be divided into teams and challenged to find various types of primary sources on a particular subject. This type of exercise usually necessitates using a variety of databases, but now can be done exclusively in *Summon*. Search results could then be compared. The first page of results for a *Summon* search for the United States Sanitary Commission, limited to 1861-1865, includes newspaper articles from the *New York Times Historical* and *Accessible Archives* databases, ebooks from the *HathiTrust Digital Library*, and both pamphlets and photographs from the Library of Congress'

American Memory.

Some databases may be a mix of materials which can be easily discovered in *Summon* and others not easily discovered. Hein Online's *American Indian Law Collection* includes both monographs and serials. The monographs are easily identified in a *Summon* search. A series such as the *Annual Report of the Commissioner of the Office of Indian Affairs to the Secretary of the Interior* is easily identified, but the contents of the individual annual reports are not searchable in *Summon*. Students will need to be taught how to search this database so that information, such as the Indians' account of the fight at Wounded Knee Creek from the 1891 *Annual Report*, can be discovered and accessed. Another reason for teaching students to search a database individually is that some of the databases of digitized historical materials that are included in the *Summon* database don't work well with the link resolver, which can be very frustrating to students.

The titles in some databases may be both discoverable and accessible in a *Summon* search, but the librarian may still decide to teach the database to students so they can use the specialized search options that are available. The *Rock and Roll, Counterculture, Peace, and Protest* database allows the researcher to limit search results by themes, such as Student Activism, Vietnam, or Women's Rights. It also allows the researcher to limit search results by document types that don't exist in *Summon*, such as Fanzines or the Underground Press.

CONCLUSION

Summon has many advantages for the student researcher. The *Summon* database includes a wide variety of items from many sources, eliminating some of the need to know which database to choose. After a preliminary search, the variety and types of limiters is clearly seen, facilitating the ability to narrow search results. However, searching for historical primary sources can be complicated because some materials are easily discovered and accessed in *Summon* while others are not. When planning a library instruction session that will include historical primary sources, it is necessary to know the state of discovery and access for each source of primary sources that will be needed and to plan the teaching session accordingly.

APPENDIX

Teaching Techniques to Discover and Access Historical Primary Sources Using Summon

Planning

- Decide which sources of historical primary sources will be most needed for the course and assignment.
- For each source to be used, check discovery and access in Summon and decide which sources will need to be taught as sources that must be searched individually.
- Be aware that discovery and access for any of the resources in the Summon database may change at any time and be prepared to be flexible.

General Teaching Techniques

- Teach students that Summon includes only some of the resources made available by the library.
- Teach students to formulate effective Summon search strategies to discover and access historical primary sources.
 - General search techniques, such as Boolean operators, phrase searching, etc.
 - Basic search post-limits, such as content type, date published
 - Advanced search options, such as author/creator, expanded content types
 - Known item searches

Teaching Techniques for Archival Historical Primary Sources

- Teach students to limit the content type to archival material or manuscripts.
- Teach students to expand a search outside the library's collection when results of a Summon search are limited.
- Teach students how to directly access local archival resources, especially if search results are limited.

Teaching Techniques for Print Historical Primary Sources

- Teach students to limit the search results to items from the library catalog, of the appropriate content type, or are in a particular library
- Teach students to use the library catalog if the ability to search tables of contents, or other features unique to the library catalog, would be useful.
- If necessary, teach students how to use appropriate print indexes or databases for materials that aren't included in the Summon database.

Teaching Techniques for Virtual Historical Primary Sources

- Teach students to limit search results to items that are full text online.
- Teach students to use the link resolver in order to access items that are full text online.
- When necessary, teach students to search particularly valuable databases individually.