Summon Quarterly Update

2017 Product Roadmap and Release Highlights

Brent Cook, Director of Product Management Discovery, Ex Libris
Today’s Session

2016 Highlights

2017 Product Roadmap
  • Key focus areas
  • Key enhancements
  • Next steps

Summon new Analytics & Reports (OBI)
Advancing Summon Leadership

**Major enhancements delivered in 2016**
UX, product integrations, performance improvements, more

**A growing customer community**
>800 Summon institutions
>80 new customers in 2016

**Rich 2017 roadmap**
Analytics & reports, bX
Recommender, APIs, more

**Continuous community collaboration**
ELUNA & IGeLU, Summon PWG,
1st NERS voting, Idea Exchange

**Constant product innovation**
Quarterly product releases
Release date published in advance

**Increased usage by patrons**
2.5+ million searches per day
Enhanced system uptime
2016 Product Highlights
Product Enhancements and New Functionality

Query Expansion using LCSH

Subject Term Boost for Relevance

Results Page Refresh

Resource Recommender Improvements
  • Over 47,000 databases now available for recommendation

Topic Explorer Improvements
  • Addition of JapanKnowledge and World Book as content sources
  • Improved content processing
  • Better Handling of longer phrases and increased matching

API Enhancements
  • Faceting by Content Provider and Database

Launch of Preview Environment

And many more improvements
Strategic and Continuous Content Growth

> 2.8 Billion items - Hundreds of Updates

New & Updated Content  Recent Highlights

Commercial Content Providers

- American Psychiatric Publishing
- Oxford University Press - Very Short Introductions and multiple collections
- CAIRN – Journals
- ProQuest - History Vault collections
- McGraw-Hill – Access Science and multiple collections
- SAGE - Knowledge Business Cases, Video and multiple collections
- PierOnline – eBooks (Japanese)
- Central and Eastern European Online Library (CEEOL) – Books and Journals
- Cambridge University Press - Ben Johnson Online and multiple collections
- Medical*Online – (Japanese books)
- NBD Biblion Uittrekselbank (Dutch)
- Verlag C.H. Beck – (German books)

- Gale – National Geographic, Business Insights, and Multiple Collections
- Henry Stewart Talks – Journals
- Edward Elgar Publishing Ltd - Reference Books

Open Access & Open Educational Resources

- U.S. Department of Energy- OSTI SciTech Connect
- Parliamentary Library, Australia
- Exeley, Inc. – Open Access Journals
- OpenStax ebooks
- OpenSUNY Textbooks
- Open Textbook Library
- London Southbank Institute Open Research
- World Bank Open Knowledge Repository
- German National Library of Economics – EconStor
- Cognitive Sciences ePrint Archive
- 1Science - OAfinder
• Over 99.9 percent uptime for the last year
Roadmap Confidentiality

The information provided here gives a high level view of the planned roadmap for Summon and the new functionality that will be available. The information in this document is confidential and proprietary to Ex Libris.

The roadmap for 2017 is a planning document. Each feature will need to be scoped for functionality, sized for level of effort, and scheduled for delivery. During this process it is possible for some features to move off the roadmap and others to be added.

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Roadmap Process

Innovative services

Bug fixes

Product working group

NERS Enhancements Voting

Infrastructure

Idea Exchange

Roadmap Plan
Roadmap Focus Areas

**User Experience**
- Results Page Improvements
- Search within Journal
- Course Reserves
- Discipline on Advanced Search
- Scholar Profiles

**Exploration Services & Relevance**
- bX Recommender
- Syndetics Unbound
- Subject Term controls in UI

**Library Empowerment**
- Preview Environment v2
- Increased frequency of rights
- Summon Over Alma
- Content indication in Summon index

**Openness**
- Open access: filter & UI Indicator
- API Documentation
- Integration with Dev Network
- Topic Explorer for API

**Analytics & Reporting**
- OBI: Additional Events
- OBI: Custom Reports

**Community Engagement & Collaboration**
- Idea exchange
- NERS voting
- Summon Product Working Group
- ELUNA, IGeLU
- Customer Knowledge Center
- New Training Kit
Community-driven ideas to enrich and influence product roadmap

- Idea exchange
- NERS voting

Community collaboration

- Summon Product Working Group
- ELUNA, IGeLU
- Conferences and events (e.g. ACRL, ER&L)

Knowledge sharing

- Customer Knowledge Center
- New Training Kit

Community impact (example): Summon Preview Environment
Welcome! New Summon Customers

Some of the recent institutions who joined the Summon community:
**Summon 2017 Release Plan**

**FEBRUARY RELEASE**
- February 1st – Release launch date

**MAY RELEASE**
- May 3rd – Release launch date

**JULY RELEASE**
- July 26th – Release launch date

**NOVEMBER RELEASE**
- November 15th – Release launch date

*The release date refers to the go live date for production. Preview environments should be available 2 weeks in advance.*
Summon 2017 Release Plan

**FEBRUARY RELEASE**
- February 1st – Release launch date

**MAY RELEASE**
- May 3rd – Release launch date

**JULY RELEASE**
- July 26th – Release launch date

**NOVEMBER RELEASE**
- November 15th – Release launch date

**February 2017**
- Bug fixes and customer requirements
- Topics, Best Bets and Resource Recommender follow up from December release
- Responsive design menu refactoring

**May 2017**
- bX Recommender
- Syndetics Unbound
- Preview Environment v2
- Summon over Alma
- Open access: filter and UI Indicator
- Discipline on Advanced Search form

**H2 2017**
- Increased frequency of rights
- Scholar Profiles
- Search within a Journal
- UI Improvements
- Availability for API
- Topics for API
- Controlled Vocab: Subject terms in the UI
- Course Reserves
Additional Candidate Roadmap Items

Roadmap items that are not associated with a specific release:

- Addition of the API documentation to the Dev Network
  - Initial milestone will be moving over current documentation

- Relevance Improvements—release of functionality will depend on results of testing of system improvements
  - English V2
  - German V2
  - Citation Query

- Sort by Date issue

- Increase available results from 200 to 1,000
Summon May Release
May Release

- bX Recommender
- Syndetics Unbound
- Preview Environment Phase 2
- Summon over Alma
- Discipline on Advanced Search form
- Open Access Improvements
bX Recommender

- Addition of recommendation of other content based on a specific results or “users who were interested in this article were also interested in...”
Syndetics Unbound

• Leverage new Syndetics functionality to create a more rich user experience on the catalog details page
Syndetics Unbound

• Will include the ability to “browse the shelf,” add recommendations and reviews, and a variety of other content
• This will require an additional subscription
Preview Environment: Phase 2

- Inclusion of access to the Admin Console
  - Allows for turning new features on and off
  - Enables adjustment of configuration of User Interface, including changing logos, colors, and active features
Summon over Alma

• **Services page**
  - Delivery of patron account data in Alma
  - Ability for users to log in to view their account information
  - A customizable page that shows items checked out, holds, fines, etc

• **Publish catalog data**
  - Rather than the output from Voyager of new/changed records and the batch input into Summon, Alma will “publish” new and changed records from the Alma bibliographic database to Summon
  - These records will be picked up by the Summon indexing programs

• **Rights management for e-resources**
  - “Client center” functions embedded in Alma
  - Single activation – there is no need to activate in both Alma and Summon, just a new process
Discipline on Advanced Search form

Add an option to search by Discipline to the Advanced Search form. This will allow users to pre-filter a search by discipline(s) similar to creating a scoped search via the widget builder.
Open Access

- Addition of open access facets and indication in UI with admin toggle to turn on or off
  - Icon to identify sources of Open Access Content
  - Ability to filter results
  - Inclusion on the advanced search form
Summon Product Releases –
Second Half 2017
Second Half 2017

**Focusing on Fundamentals**
- Increased frequency of rights
- Expanding access to results beyond 200
- Improved API Documentation

**Improving Existing Functionality**
- Search within a Journal
- UI Improvements from 2017 August Release
- Controlled Vocab: Subject terms in the UI
- Availability for API
- Topics for API

**Moving Summon Forward**
- Course Reserves
- Scholar Profiles
Focus on Fundamentals
Focus on Fundamentals

- Increased frequency of rights
  - Ability to update rights daily
  - Faster activation or removal of resources
- Expanding access to results beyond 200
- Improved API Documentation
  - Movement of documentation to Ex Libris Developers Network
  - Addition of updated examples
Improving Existing Functionality
Search within a Journal

• Improve overall discoverability of journal articles
• Create a widget that allows for a search that’s pre-scope to only this journal
Results Page Improvements

• Accessibility improvements
• Icon and background color cleanup
  • Better contrast
  • Ability to change icons
  • Decouple header colors from menu colors
• Permalink placement improvement
• Use of third column
API Improvements

- Availability for API
  - Ability for API users to display availability information for content an institution has rights to

- Topics for API
  - Provide access to the necessary fields to create the topic explorer pane
  - Should provide institution the ability to create a topic explorer with the same contents: Encyclopedia resource, suggested librarian, Recommended topics, Recommended Research Guides
Subject Term Improvements

• In both the preview pane and the catalog detail page, complete Subject Terms strings are clickable search links that lead to results created by combining the individual terms.
Moving
Summon
Forward
Course Reserves

This feature would be available only for Summon over Alma customers

- Displaying an individual institution's course info on a record in Summon
- Displaying course info on a record in the services page
- Indexing course info and returning results for course keywords in Summon
- Course info facets in Summon
- Course pre-filter – i.e. run this query only on records associated with courses
Scholar Profiles

- Highlight author and scholar profiles for searches for author’s names
- Works in conjunction with Topic Explorer
- Give patrons a starting point for learning about or delving into the research of a specific author, including:
  - Brief Author’s Bio
  - A thumbnail image
  - Links to appropriate content (based on rights)
Summon new Analytics & Reports (OBI)
New OBI Reports
New OBI Reports

Action Usage Searches weekly

Searches

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<tr>
<th>Week</th>
<th>Facet Filtering</th>
<th>Basic search</th>
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New OBI Reports
New OBI Reports

Facet Usage weekly
Last 9 weeks. Includes only facet values with more than 10 clicks a day. Sessions refers to sessions where a facet was used.

Facets Selected

Week  Jan 30

- Dec 05  248
- Dec 12  335
- Dec 19  117
- Jan 06  138
- Jan 13  598
- Jan 20  1,199
- Jan 27  831

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<tr>
<td>Jan 27</td>
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### Popular Searches in last 2 months

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New OBI Reports
New OBI Reports

### Zero Result Searches weekly

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<th>Date</th>
<th>Search Strings</th>
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<td>Tue, Jan 24</td>
<td>ISSN:1006-481X, ISSN:1239-2993</td>
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<tr>
<td>Wed, Jan 25</td>
<td>Decrease in brain derived neurotrophic factor expression</td>
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Edit - Refresh - Print - Export - Add to Highlights Book - Copy
What’s next?

• Initial documentation available in the Knowledge Center April 3

• A dedicated session on how to use OBI is scheduled for the Ex Libris Technical Seminar on Monday, May 8 from 1:30 – 3:00 pm

• The majority of customers will be active prior to ELUNA

• UK Summon Day on April 27
ELUNA Customer-Led Sessions

**Summon / 360 Link Product Working Group Meeting**
- Daniel Forsman, Chalmers University of Technology

**From Sierra to Seattle: Summon Discovery Synchronization in a Multi-Type Consortial Environment**
- Susan M. Johns-Smith, Pittsburg State University

**VuFind: Open Source Options for Summon/360 and other Ex Libris Products**
- Christopher Hallberg, Villanova University
- Demian Katz, Villanova University

**Using APIs for Discovery and Delivery**
- Ken Varnum, University of Michigan

**libFX – Real-time Summon Use Visualized**
- Annette Bailey, Virginia Tech

**Implementing and Using Tabbed Design in Summon Discovery Search System**
- Edward McKennon, Glendale Community College
- Sean O'Brien, Glendale Community College

**Customizing Summon with Angular**
- Robert Sebek, Virginia Tech

**EAD Finding Aids in Summon**
- Monish M. Singh, Marist College
- Katy Silberger, Marist College

**Increasing depth and scope of content in discovery** – library advocacy discussion
- Laura Morse, Harvard University
- Amira Aaron, Northeastern University

**Summon: Six Years in ...**
- Nancy M. Crabtree, Missouri Southern State University
- Xiaocan (Lucy) Wang, Missouri Southern State University
- Robert Black, Missouri Southern State University

**Making Summon Go (For Everyone)**
- Robert J Sandusky, University of Illinois at Chicago
- Gwen M. Gregory, University of Illinois at Chicago
- Kavita Mundle, University of Illinois at Chicago
ELUNA Customer-Led Sessions

Summon, Serendipity and Scholarly Success: Improving the User Experience with Discovery
- Alec Sonsteby, Metropolitan State University
- Jennifer DeJonghe, Metropolitan State University

Gaining insights through Summon Logs
- Katy Silberger, Marist College

 Summon Over Alma
- Jackie Wrosch, Eastern Michigan University

Better managing e-resource access and cataloging records with open-source tools
- Cathy Weng, The College of New Jersey
- Yuji Tosaka, The College of New Jersey

What We Need To See in Today’s Knowledgebase (And Maybe Something For Tomorrow’s)
- Peter McCracken, Cornell University

Discovery Panel: A Compare and Contrast of Summon & Primo
- Judy Drescher, Molloy College
- Christian Haenger, University of Mannheim
- James Hammons, Ball State University
- Lorne Madgett, University of British Columbia
- Randy Oldham, University of Guelph

Talk Back: Summon/360 Q&A
- Judy Drescher, Molloy College
- Annette Bailey, Virginia Tech
- Angela Sidman, Yale University
- Brent Cook, Ex Libris
- Eddie Neuwirth, Ex Libris
- Yuval Kiselstein, Ex Libris
ELUNA Ex Libris Sessions

Discovery Content and Beyond: Leveraging Content and Big Data Analytics for Discovery Services
• Christine Stohn, Ex Libris
• Eddie Neuwirth, Ex Libris

Content Ingestion: The Trials and Triumph
• Dave Hovenden, Ex Libris
• Eddie Neuwirth, Ex Libris

Summon Demo
• Marliese Thomas, Ex Libris

Summon Product Update, Roadmap and Q&A
• Brent Cook, Ex Libris

360 Product Update, Roadmap, and Q&A
• Eddie Neuwirth, Ex Libris
Ex Libris Technical Seminar sessions

Best Practices for Customizing Summon
• Alice Tsoi, Ex Libris
• Elizabeth Farrell, Ex Libris

Optimizing Your Data for Discovery in Summon
• Sharai Perkes, Ex Libris
• Elizabeth Farrell, Ex Libris

Getting to Know Oracle Business Intelligence (OBI) for Summon
• Brent Cook, Ex Libris

How Metadata, Results and Recommendations Interact in Summon
• Brent Cook, Ex Libris

Uploading Counter Reports and Configuring SUSHI in the Client Center and Intota
• Amy Pemble, Ex Libris
• Scott Shull, Ex Libris

Enabling E-Journal Portal and Link 2.0 from the Client Center and Intota
• Elizabeth Farrell, Ex Libris
THANK YOU
Brent.Cook@ExLibrisGroup.com