Summon Product Update

Roadmap and Q&A

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Agenda

- Review of Product and Content Updates
- 2017 Roadmap Review
Review of Product and Content Updates
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

> 2.9 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
2017 Roadmap Review
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.

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2017 Roadmap Areas & Highlights

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

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

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

Analytics & Reporting
- OBI: Additional Events
- OBI: Custom Reports
* The release date refers to the go live date for production. Preview environments should be available 2 weeks in advance.
**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

**July 2017**
- UI Improvements
- Controlled Vocab: Subject terms in the UI
- Course Reserves

**November 2017**
- Scholar Profiles
- Search within a Journal
- Availability for API
- Topics for API
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

Increased Frequency of Rights

Sort by Date issue

Increase available results from 200 to 1,000
May Release
bX Recommender

Customer Benefit

- Recommend other content based on a specific results or “users who were interested in this article were also interested in...”
Customer Benefit

- Include the ability to “browse the shelf,” add recommendations and reviews, and a variety of other content.
Customer Benefit

- Create a more rich user experience on the catalog details page
Customer Benefit

- Allows for turning new features on and off and enables adjustment of configuration of User Interface (including changing logos, colors, and active features) in a preview environment.
Customer Benefits

- Enhanced integration of library management and discovery services

- **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
Customer Benefit

- Enhanced integration of library management and discovery services
Customer Benefits

- Enable identify of Open Access content through addition of a facet, an icon on the results page, and option on the advance search form
Customer Benefit

- Allow option for users to pre-filter a search by discipline(s) similar to creating a scoped search via the widget builder.
Customer Benefit

- Improved administration via bulk uploading including adding Tags in the bulk import and improved support for including punctuation, longer length and HTML styling for customization.
July Release
Results Page Improvements

Customer Benefits

- Improve the usability of the Summon results page through various enhancements

**Feature**

- Accessibility improvements
- New include-exclude functionality, more intuitive facet navigation and tool tips
- Icon and background color cleanup
  - Better contrast
  - Ability to change icons
  - Decouple header colors from menu colors
- More prominent Permalink placement
- Expand access to results beyond 200
Customer Benefit

- Enable search and display of course reserve information through Summon

*only available for Summon over Alma customers*

Feature

- 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
November Release
Customer Benefit

- Provide patrons a starting point for learning about or delving into the research of a specific author

Feature

- Highlights author and scholar profiles for searches for author’s names
- Provides profiles, citations and affiliations for more than 3,000 scholars from COS/Pivot a ProQuest product
Search within a Journal

Customer Benefit

- Improve overall discoverability of journal articles with a widget that allows for a search that’s pre-scowed to only a specific journal
API Improvements

Customer Benefits

- Expand capabilities for libraries leveraging the Summon API for discovery

- **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

- **Improved API Documentation**
  - Movement of documentation to Ex Libris Developers Network
  - Addition of updated examples