Summon Quarterly Update

2017 Product Roadmap and Release Highlights

Brent Cook, Director of Product Management, Summon
Today’s Session

2017 Product Roadmap
  • Key focus areas
  • Key enhancements

July Release Overview

November Release

Community Engagement
Summon 2017 Roadmap
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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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
SUMMARY PLAN FOR 2017

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

**MAY RELEASE**
- May 3rd

**JULY RELEASE**
- July 26th

**NOVEMBER RELEASE**
- November 15th

**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
Roadmap items 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

- **Increased Frequency of Rights**

- **Sort by Date issue**

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

- bX Recommender
- Syndetics Unbound
- Preview Environment—Admin Console
- Summon over Alma
- Open Access Improvements
Customer Benefit

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

• If you want to try
  • Contact support to get your bX Recommender key
  • Use the key to configure bX Recommender in the Admin Console

• Preview environment will be live from July 12 to July 26
  • Ideal time to test it out and share with your colleagues prior to activating it on your production site
Customer Benefit

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

- Include the ability to “browse the shelf,” add recommendations and reviews, and a variety of other content
Syndetics Unbound—How to Get It

- This service requires an additional license fee beyond the standard Syndetics Summon subscription, but the license can also be used to power Syndetics Unbound in your traditional OPAC or other supported service.

- For more information on how to subscribe to this feature:
  - Visit https://proquest.syndetics.com/ or
  - Contact Doug McMillan, VP Strategic Partnerships, Doug.McMillan@proquest.com.
Preview Environment Phase 2

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
Summon over Alma

Customer Benefit

- Enhanced integration of library management and discovery services
Customer Benefits

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

• Documentation for using this feature can be found in the article: **Summon: Open Access Filter**
  • You must turn ON the Open Access Indicator setting in the admin console (see Open Access Indicator section of Settings page) to activate the features.

• Notice a database or source indexed in Summon has Open Access content but not flagged as Open Access? Or one incorrectly flagged? Let us know by submitting a case, and selecting
  • Product: Summon Index
  • Category: Client Content / Content Issue
  • Subject: Corrections

• If you know of an Open Access databases or sources that are not being indexed in Summon, please suggest them via the Content Idea Exchange.
July Release
Subject Term Improvements

Customer Benefit

- 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.
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
Customer Benefits

- Improvements to meet or exceed the Voluntary Product Accessibility Template (VPAT), Web Content Accessibility Guidelines 2.0 (WCAG)

- Fixed unintended scroll on focus when using arrow between UI panes
- Calendar improvements including calendar slider labeling for Screen Readers and better reading month and year in Calendar widget
- Addressed issue with filter/facet on select going to the bottom of the list
- Improved screen reader support for facet/filter state (selected - unselected – excluded)
- Improved screen reader support for label sort by dropdown
Results Page Improvements—Icon and Background Colors

Customer Benefits

- Improvements to increase contrast and visibility within the user interface and to allow for better customizations to meet your branding guidelines

Feature

- Ability to change icon colors in the header
- Decouple header colors from menu colors
- Ability to change right hand column to white background
Header and Background Icons—Before

- Advanced search label, icons and menu colors were all connected.
- No option for the header icons; must be white.
- Right-hand column is gray only.
• Advanced search label, icons and menu colors can be set separately.
• Header icons can be assigned a custom color.
• Right-hand column can be gray or white.
### Header and Background Icons—Configuration

<table>
<thead>
<tr>
<th>Customization</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Custom Colors</td>
<td>ON</td>
</tr>
<tr>
<td>Primary Link Color</td>
<td>#00088cc</td>
</tr>
<tr>
<td>Primary Link Color (visited)</td>
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</tr>
<tr>
<td>Primary Link Color (hover/active)</td>
<td>#005580</td>
</tr>
<tr>
<td>Secondary Link Color</td>
<td>#333333</td>
</tr>
<tr>
<td>Secondary Link Color (visited)</td>
<td>#333333</td>
</tr>
<tr>
<td>Secondary Link Color (hover/active)</td>
<td>#F56c31</td>
</tr>
<tr>
<td>Permalink Color</td>
<td>#333333</td>
</tr>
<tr>
<td>Permalink Color (hover/active)</td>
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</tr>
<tr>
<td>Selected Facet Link Color</td>
<td>#0065a4</td>
</tr>
<tr>
<td>Selected Facet Link Color (hover/active)</td>
<td>#000000</td>
</tr>
<tr>
<td>Authentication Banner Background Color</td>
<td>#850900</td>
</tr>
<tr>
<td>Authentication Banner Link Color</td>
<td>#FF0000</td>
</tr>
<tr>
<td>Authentication Banner Link Color (visited)</td>
<td>#e6e6e6</td>
</tr>
<tr>
<td>Authentication Banner Link Color (hover/active)</td>
<td>#e6e6e6</td>
</tr>
<tr>
<td>Header Background Color</td>
<td>#FF4500</td>
</tr>
<tr>
<td>Header Link Color</td>
<td>#000000</td>
</tr>
<tr>
<td>Header Link Color (visited)</td>
<td>#FF0000</td>
</tr>
<tr>
<td>Header Link Color (hover/active)</td>
<td>#FF0000</td>
</tr>
<tr>
<td>Icons Color (Save, Chat, Hamburger Menu)</td>
<td>#FFFFFF</td>
</tr>
<tr>
<td>Change Third panel background color to white</td>
<td>OFF</td>
</tr>
</tbody>
</table>
Customer Benefits

- Brings permanent link icon forward to make it easier to locate for the end user and more effective by bringing the link forward in the user experience.

- Previously hidden in the preview pane; is now both in the preview section and as an icon with a tool tip at the top of the result.
Preview Pane on Hover

Customer Benefits

- Easier access to details in the preview pane for at-a-glance evaluation of a result

- Maintains previous functionality requiring you click on the Preview link to see the preview inline with the results.
- Adds ability to see preview on hover over the preview icon
Improved Faceting

Customer Benefits

- More intuitive interactions with the facet panes to allow for easy inclusion or exclusion of facets

Redesigned facet interaction to address the following issues with the Facet Pane:

- Confusion around exclude functionality (the red circle-X) in the primary facet pane—what it is and how to apply
- Confusion over using the include green check mark and the red X exclude functionality in the More Facets pane
- Apply and cancel buttons in the More Facet pane required second apply / click in the primary pane for changes to take place
Faceting—Before

- Clicking on the facet label (such as “Journal Article”) would include the value, and indicate inclusion by bolding the link text and displaying a green check next to it.

- Clicking on the red circle would exclude the value, and indicate exclusion by striking through the text and displaying the red X by the facet.

- Clicking on the Edit pencil icon would allow for selecting multiple values before applying them.
Faceting—After

- Exclude has been moved solely to the More facets pane, greatly simplifying the faceting process in the primary pane.
- Use of the Edit pencil button stays the same.
More Facets Pane—Before

- Clicking on the facet label (such as “Journal Article”) would include the value, indicated by bolding the link text and displaying a green check next to it.

- Clicking on the red circle would exclude the value, indicated by striking through the text and displaying the red X by the facet.

- Clicking on the Apply button would apply all changes.

- Clicking the Cancel X by the Apply button would shift focus to the default Facet pane, where the user would need to either click Apply or the Cancel X a second time to exit out of applying facets.
Faceting—After

- Both check marks for Include and red X’s for exclude are visible and grayed out. Clicking on either will select the appropriate action for the associated value.

- Clicking on the label selects include for that facet.

- Clicking the Cancel X by the Apply button now closes the More Facet pane and clears any changes made during that.
## Course Reserves

### Customer Benefits

- 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

### Course Reserve Information

- World History WH101 (23)
- Modern Short Story ENG 413.002 (18)
- Medicine in Ancient Times (II) ANC-MED1702 (7)
- Art History 101 ArtHist101 (5)
- Introduction to Biology BIOL101 (5)

More...
AngularJS Upgrade

Customer Benefits

- Move to current version of AngularJS for most recent improvements and improved security

- Better performance in page rendering, particularly in Internet Explorer

- **Note:** this upgrade of AngularJS will impact both support of Internet Explorer 8 and SpringShare Chat 1.0
  - IE8 will no longer be supported since it does not support the most recent version of AngularJS
  - SpringShare Chat 1.0 is retiring on Jan. 31, 2018
    - Will no longer be supported, with majority of customers migrated to 2.0 by end of July

Welcome to Springshare Help for v1 Products!

<table>
<thead>
<tr>
<th>LibGuides / CMS v1</th>
<th>LibAnswers v1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guides by Topic</td>
<td>Guides by Topic</td>
</tr>
<tr>
<td>Update to v2 for FREE</td>
<td>Update to v2</td>
</tr>
<tr>
<td>v1 Retirement: Jan 31, 2018</td>
<td></td>
</tr>
</tbody>
</table>
Customer Benefit

- Better logic around merging of records to ensure limiting or sorting by date displays more accurate information

- Adjusted rules for merging records to accommodate for date variations based on source of metadata
- Should greatly reduce error cases on date displays

- Note: may not eliminate all use cases
  - Need to balance between deduplication and ensuring dates are used appropriately
Increase Results from 200 to 1,000

Customer Benefit

- Provide access to records beyond the first 200

Higher limit maintains protection for content displayed and performance of the system, while allowing for greater access

Can configure system so that incremental loads of infinite scroll results will determine upper limit
Customer Benefit

- Increased sophistication of indexing to allow for better matching and relevance based on real world usage of punctuation, spelling and grammar

- Improved handling of punctuation and special characters
- Improved use of synonyms
- Improved stemming
Improved API Documentation

Customer Benefits

- Expand capabilities for libraries leveraging the Summon API for discovery

- Movement of current documentation to Ex Libris Developers Network
  - Addition of Summon API forum and blog
  - If you want to share information about the API, please post to the forums or ask about adding content to the blog

Feature

Use the Summon API to create an interface for your own unified search experience across print books, ebooks, journals, newspapers, video, images, research guides, and more, drawn from a consolidated index of pre-harvested content optimized for discovery.

Learn

- APIs
- Summon APIs
- Search APIs
November Release
Summon 2017 Release Plan

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Community Engagement
Roadmap Process

Roadmap Plan

- Innovative services
- Bug fixes
- Product working group
- NERS Enhancements Voting
- Infrastructure
- Idea Exchange
Idea Exchange

• Previously we maintained a list of requests internally
  • Kept a tally of requests
  • Did not allow for easy sharing of info externally
  • Did not allow for back and forth communication

• Anyone can join the Idea Exchange
  • Suggest an improvement
  • Vote on an improvement
  • Comment on an improvement

• Ex Libris will:
  • Review these suggestions
  • Comment on them and change status as appropriate

• Note: There is no inherent commitment to develop functionality on the Idea Exchange, regardless of votes
New Enhancement Request System (NERS)

• Enhancement Request Process is managed by ELUNA and IGeLU
  • The Summon Working Group prioritizes and recommends the top enhancement requests.
  • Ex Libris is committed to in-depth reviews of these requests and delivery of appropriate top requested features in a timely manner

• Participation in NERS open to members of ELUNA and IGeLU

• Ex Libris will:
  • Review these features with the Summon Working Group
  • Verify and accept enhancements if they are part of the product roadmap, are technically feasible, and fit within the development timeline.

• Note: Ex Libris does have a commitment to develop these features, unlike the Idea Exchange where there is no commitment
ELUNA 2017 Slides Available in the Knowledge Center

- Anyone can access slides from ELUNA via the Ex Libris Knowledge Center
IGeLU would be delighted to welcome you to our annual conference in September. The 2017 event will be held in St. Petersburg between the 9th. to 14th. September and will be hosted by the National Library of Russia.

- The IGeLU conference is truly diverse and international offering community authored content and networking opportunities with global reach
- Engage with librarians and technologists from academic, national, government & specialist libraries with differing perspectives & new ideas
- Be part of our dynamic and proactive community with opportunities to join the discourse about Ex Libris products plus major topical library, technology and publishing issues
- Direct insight into the Ex Libris development paths for their products
Questions?
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