Summon Product Update

Year in Review and Roadmap Update

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Agenda

• Review of 2017 Roadmap and Content Updates
• Relevance and Performance Improvements
• Preview of Items Under Consideration for 2018
Review of Roadmaps and Content Updates
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
**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.*
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
• Search within a Journal
• Availability for API
• Topics for API
• Increased Frequency of Rights
Strategic and Continuous Content Growth

> 3 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 Uttrekselbank (Dutch)
- Verlag C.H. Beck – (German books)
- McGraw-Hill - F.A. Davis PT Collection
- McGraw-Hill - HarrisonMedicina
- Gale – National Geographic, Business Insights, and Multiple Collections
- Henry Stewart Talks – Journals
- Edward Elgar Publishing Ltd - Reference Books
- Association for Computing Machinery (ACM)
- Elsevier - ClinicalKey ES guides and Techniques
- Chemical Society of Japan
- SOLIS

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
July Release Review
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

- **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
Customer Benefits

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

- Ability to change icon colors in the header
- Decouple header colors from menu colors
- Ability to change right hand column to white background
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
Customer Benefits

- Enable search and display of course reserve information through Summon

*only available 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 NAME AND NUMBER

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...
Sort by Date Improvements

Customer Benefit

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

ExLibris idea exchange

- 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
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
Other Items Completed Since the May Release

- Addition of the API documentation to the Dev Network
  - Initial milestone will be moving over current documentation
- Linking of Scopus Counts in the Results List
- SCOPUS
- NERS
- Sort by Date issue
- Increase available results from 200 to 1,000
November Release Roadmap Items

• Search within a Journal
• Availability for API
• Topics for API
• Scholar Profiles
• Customizations in the Right-Hand Column *
• In Index Flag *

* Currently working on bringing these into the November release
Search within a Journal

Customer Benefit

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

Note: This is a mockup and the final feature may vary from this image
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
Customizations in the Right-Hand Column

Customer Benefit

- Create custom messaging or functionality based on your institution and users’ needs

Planned Functionality

- Ability to add custom content or widgets in tiles along the right-hand column
  - Can turn this feature on or off
- Tiles can include rich HTML or Widgets
  - Choose to embed JavaScript widgets or use the HTML tool to create simple content
- Tiles can be triggered by a keyword or be persistent
Custom Widgets in the Right-Hand Column

Note: This is a mockup and the final feature may vary from this image.
Customer Benefit

- Better visibility into the index and the KB

Note: This is a mockup and the final feature may vary from this image.
Relevance and Performance Improvements
Relevance Improvements—English and German

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
Relevance Work

**Continued Controlled Vocabulary Improvements**
- Review of impact of Controlled Vocabulary in relevance
- User Interface Improvement
- Use of LCSH variants to increase Topic Explorer matches to Controlled Vocabulary

**German and English Search Improvements**
- Improved handling of punctuation and special characters
- Improved use of synonyms
- Improved stemming

**Increased Frequency of Rights**
Planned Relevance Work

• Citation Query
  • Specific Known Item Search when a user searches using a complete citation
  • Current candidates for an improved algorithm are being tested
  • When a candidate passes we will implement it in production

• Known Item Searching
  • Researching various examples provided by users to determine if and where we can improve
Performance Improvements

• Summon Results Page Performance Improvements
  • Improved when and how elements are loaded on the page
  • Currently reviewing the improvements in production and identifying additional improvements to make

• Admin Console Usability and Performance Improvements
  • New navigation on the main settings page
  • Much shorter load times for the initial Settings page
Preview of Items Under Consideration for 2018
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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The information in this document is for information and its contents are subject to change, without prior notice, at the sole discretion of Ex Libris.
New Enhancement Request Voting System

• The New Enhancement Request Voting System is a benefit of IGeLU and ELUNA
  • Members vote on top candidates for inclusion in the Summon Roadmap
  • Ex Libris is committed to developing those top candidates

• NERS is already having an impact
  • SCOPUS count feature was identified as an important feature via NERS and was quickly included in the July Release
  • Custom Widgets in the Right-hand Column
New Enhancement Request Voting System

• Features Commited for the 2018 Roadmap
  • Ability to customized Advanced Search fields
  • Allow library to set whether electronic or print item displays first
  • Add results beyond your library's collection should not appear when results are refined to library catalog

• Completed Features
  • For Scopus results, include item-level link to result citation in the A&I Detail page

• Scheduled Features (November)
  • Ability to Add Customizations to the Right Pane
  • Add Clear Search button or Start Over button
  • Consider having the search and clear form buttons at the top of the form
Idea Exchange

• Also review items on the idea exchange for inclusion
  • Product management uses voting on idea exchange to influence inclusion of feature
  • However, unlike NERS, there is not a commitment for the number of features included on the roadmap or timing for inclusion

• Development and Product Team will reviewing items for feasibility and cost
  • Will include some features on the roadmap
  • Some idea exchange items are not release-related and will also be reviewed for inclusion in 2018
  • Status of items will be updated on the Idea Exchange
Idea Exchange—Top Items for Consideration

- Add search history and allow searching with sets from the search history
- Add a custom JS/CSS field to simplify UI customization
- Add public note text to Summon results
- Add the option to force Summon and 360 Link to load over https
- Exclude Newspaper Articles and Book Reviews in default basic search
- More clearly identify between full-text articles and full-text abstracts
- Make "Best Bets" show up when tag keywords are present in search, not just when there's an exact match
- Integrate LibGuides Database A-Z list into Summon search

- Provide the ability to separate books and ebooks when searching
- Ensure Summon is displaying custom coverage dates
- Display all links available in Summon results page
- Exclude Content Type Newspaper Article should include Online Newspaper Content
- Automatically searching for the corrected spelling
Market Needs and Internal Requirements

• Review internal tools and Admin Console for improvements
• Scholar Profiles
• Increased frequency of indexing and catalog updates
• Integration with additional tools and systems
Process

- **Schedule Releases**
  - Work with the Summon Working Group to determine the best dates for major releases
  - Schedule NERS features for inclusion

- **Review Idea Exchange items for sizing, scoping and feasibility**
  - Inclusion will be based on the cost and benefit of each feature
  - Voting in the Idea Exchange certainly influences inclusion of features but is not guaranteed

- **Review internal and market needs for additional functionality**

- **2018 Roadmap updates will be presented in Quarterly Roadmap Webinars and the finalized roadmap will be published in the Customer Knowledge Center**