Roadmap Confidentiality

• The information provided in this presentation gives a high level view of Summon’s planned future roadmap and functional offerings. The information in this document is confidential and proprietary to Ex Libris.

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Roadmap Areas and Highlights

SEARCH AND EXPLORING

LIBRARY EMPOWERMENT

USER EXPERIENCE

OPEN SYSTEM
**Summon 2019 Release Schedule**

**FEBRUARY RELEASE**
- February 6th

**MAY RELEASE**
- May 15th

**AUGUST RELEASE**
- August 7th

**NOVEMBER RELEASE**
- November 6th

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**February 2019**
- Short URL for Citations (NERS—released in December)
- Citation Trail
- Configurable Topic Sources for Topic Explorer (addition of Oxford University Press in March)

**May 2019**
- Improve Results Presentation - Glanceability
- Related Items
- IEDL Reporting in OBI (NERS)
- Other OBI Reporting

**August 2019**
- Public Notes in Summon Results (NERS)
- Content Ingestion Report Improvements
- Improved Facets (NERS)
- Integration with Leganto
- Additional Click Data in OBI

**November 2019**
- Linked Data
- Topics: Recall/Precision Improvements
- Improved handling of video content (content type and thumbnail improvements)
- Open Access Facet Reporting
SEARCH AND EXPLORING
Citation Trail

**SEARCH AND EXPLORING**

**Customer Value**
- Follow citations within a search result to access articles cited in current record to discover new content

**Feature Highlights**
- Explore and discover texts using citations within text as navigation
- Follow citations within a text or find texts that cite the article
## Related Items

### SEARCH AND EXPLORING

<table>
<thead>
<tr>
<th>Customer Value</th>
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<tbody>
<tr>
<td>• Connect similar content, such as book reviews to books or book chapters to books, for improved navigation and access</td>
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</table>

<table>
<thead>
<tr>
<th>Feature Highlights</th>
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</thead>
<tbody>
<tr>
<td>• Simplify search results and connect similar items to ensure relevant items are featured prominently and associated content is easily discovered</td>
</tr>
</tbody>
</table>
Topics: Recall and Precision

SEARCH AND EXPLORING

Customer Value

• Ensure recommendations from Topic Explorer are relevant to the user’s needs

Feature Highlights

• Increase the number of topics and frequency and accuracy of matches
Linked Data

SEARCH AND EXPLORING

Customer Value

- Leverage linked data to create relationships and better expose metadata for use within Summon and in linking to external sources

Feature Highlights

- Initial release will be a site map to improve indexing via search engines (Google, in particular)
Ongoing Improvements

SEARCH AND EXPLORING

Customer Value

- Ongoing maintenance of relevance to ensure continued quality

Feature Highlights

- Did You Mean: recommendations for search queries
- Language Improvements: review relevance issues related to languages
- Review Known Item Searching and Topic Searches for possible improvements
USER EXPERIENCE
Oxford University Press Content for Topics

Customer Value

- New quality source for topic content expanding choices for libraries
- A new configuration tool for topic sources overall

Feature Highlights

- Customers will be able to enable Oxford University Press reference content as a source for Topic Explorer
- Sources for encyclopedia entries for topics will also be configurable (activated/deactivated and prioritized) by the institution using the admin console
Improved Results Presentation - Glanceability

**USER EXPERIENCE**

**Customer Value**
- Add visual indicator to help patrons better find the results they need as they scan the results

**Feature Highlights**
- Use enhanced related data to highlight information (such as type of article or length) so that patrons can see in one glance what is relevant to an individual result
Public Notes in Summon Results

USER EXPERIENCE

Customer Value

• Allow for messaging personalized for a specific institution to be included in Summon results

Feature Highlights

• Include text from the Public Notes field within the Summon results
Improved Facets

**USER EXPERIENCE**

**Customer Value**

- Customize facets to meet your specific institutional and user needs

**Feature Highlights**

- Control look and feel of Facets
- Change order of facets
- Determine which are included and which are collapsed or expanded by default
Video Improvements

**FEATURE HIGHLIGHTS**

- Better treatment of video content in Summon results
- Improved treatment of video metadata
- Exposure of data and facets related to metadata
- Display of thumbnails
# IEDL Reporting

## LIBRARY EMPOWERMENT

### Customer Value

- Determine what content is being used and how it is being accessed from Summon

### Feature Highlights

- Report on click path from Summon results to content
Reporting on additional OBI Click Data

**Customer Value**
- Determine user paths and usage of features within Summon
- Provide data to optimize use of Summon features

**Feature Highlights**
- Report on click data for Topic Explorer, Best Bets, Database Recommender and other features within the search results
Improved Content Ingestion Report

LIBRARY EMPOWERMENT

Customer Value

• Provide visibility into submission and processing of library catalog and other metadata

Feature Highlights

• Improved error reporting
  • More comprehensive error logs delivered
OPEN SYSTEM
Open Access Reporting

Customer Value

- Show importance and usage of Open Access content within an institution’s instance of Summon

Feature Highlights

- Provide reporting on number of searches where the Open Access facet is applied
Integration with Leganto Course Reading List Solution

- Provide access to a world class course reserve list management tool
- Seamless integration of Leganto functionality with Summon, including creation and management of reading lists and delivery of results via Summon
Thank You