Summon Product Update

Summon Continues to Evolve

Brent D. Cook, Director of Product Management, Summon
Let's First Celebrate You and Summon

- ~5+M End Users
- ~1,000 Institutions
- 3.5B+ Records Indexed
- 1.2+M Queries per day
Discovery Experience Principles

Discovery enrichment
E.g.: Altmetrics, Syndetics Unbound

Video content
E.g.: Alexander Street Press, Kanopy

Publisher content
E.g.: Gale, Wiley, ProQuest

Open Access content
E.g.: DOAJ, hybrid collections, IRs

Library catalog
E.g.: Alma, Sierra, WorldShare

Digital repositories
E.g.: ContentDM, Rosetta

Research outputs & data
E.g.: Esploro, Fedora, Dspace

Researcher Profiles
Esploro, ORCID
Discovery at the Heart of Users’ Workflows

Library portal
A gateway to library resources

Direct search in learning & research services, e.g.:
• Leganto
• RefWorks
• Esploro

Google, Google Scholar, 3rd party search engines
Improving visibility with Linked data & schema.org

3rd party systems via open APIs
• Highlights of Recent Improvements
• Oracle Business Intelligence Update
• Topic Explorer Update
• 2019 Summon Roadmap
• Central Discovery Index (CDI)
Highlights of Recent Improvements
Citation Trail

• Follow citations within a search result to access articles cited in current record to discover new content
• Explore and discover texts using citations within text as navigation
• Follow citations within a text or find texts that cite the article
Oxford University Press Content for Topics

**USER EXPERIENCE**

**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
**Summon over Alma**

- Added hyperlink searches from Author and Subjects on services page
- Publish Collection Level URL with Electronic Holdings

<table>
<thead>
<tr>
<th>Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOP</strong></td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>Fire</td>
</tr>
<tr>
<td>Author</td>
<td>Elfgren, Sara B.</td>
</tr>
<tr>
<td>GET IT</td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td>High school students</td>
</tr>
<tr>
<td>VIRTUAL BROWSE</td>
<td></td>
</tr>
<tr>
<td>Genre</td>
<td>Fiction.</td>
</tr>
<tr>
<td>Description</td>
<td>Evil is back in Engelsfors and threatens to engulf everyone and everything unless Minoo, Vanessa, Linnea, Anna-Karin, and Ida, the Chosen Ones, accept their strengths and trust each other unconditionally as the past becomes woven with the present, the living with the dead, and the human world with demonic forces.</td>
</tr>
<tr>
<td>Series</td>
<td>The Engelsfors trilogy ; book II</td>
</tr>
<tr>
<td>Publisher</td>
<td>New York, NY : The Overlook Press</td>
</tr>
<tr>
<td>Publication Date</td>
<td>2014</td>
</tr>
<tr>
<td>Format</td>
<td>692 pages ; 21 cm.</td>
</tr>
<tr>
<td>MMS ID</td>
<td>991321433403656</td>
</tr>
<tr>
<td>Identifier</td>
<td>LC : 2013044050;</td>
</tr>
<tr>
<td>Source</td>
<td>Library Catalog</td>
</tr>
</tbody>
</table>
Oracle Business Intelligence (OBI) Update
Change in How We Manage and Develop for OBI

• Previously one OBI team for all Ex Libris products
  • Benefit: unified process and data collection increases consistency of reporting across all Ex Libris products
  • Limitation: All requests were prioritized within the same queue, resulting in extended delays for numerous improvements and bug fixes

• Now we are moving from a centralized team to individual product teams
  • Better understanding of Summon
  • Faster response to issue within OBI
  • More control over prioritization
  • Ultimately more throughput
Impact to OBI Reporting

• Development of 2019 roadmap items delayed
  • IEDL Reporting in OBI (NERS)
  • Other OBI Reporting
  • Additional Click Data in OBI
  • Open Access Facet Reporting

• Next Steps
  • Reviewing outstanding issues with Analytics Working Group Thursday to prioritize all and set up regular method for communicating progress
  • Will publish a revised schedule for delivery of fixes and improvements
Topic Explorer Update
Current Topic Explorer Issues

• Frequency of Wikipedia content updates:
  • We manually updated on Monday, March 11
  • Integrating with available APIs to enable automation and frequent updates
  • This will be part of the November quarterly release

• The matching algorithm:
  • Revising topic algorithm as part of the November release
  • Will continue to use the blacklist functionality to block inappropriate matches
Topic Explorer: Ongoing Work

• Two focus groups identified: Topic Explorer and DB Recommender
• Need to define standard approach for addressing bias as it comes up and preventing it where possible
• Meeting Thursday, May 2 to discuss next steps with focus groups
Summon Roadmap Highlights
Roadmap Areas and Highlights

- **SEARCH AND EXPLORING**
- **USER EXPERIENCE**
- **LIBRARY EMPOWERMENT**
- **OPEN SYSTEM**
## Summon 2019 Release Schedule

### FEBRUARY RELEASE
- February 6th

### MAY RELEASE
- May 15th

### AUGUST RELEASE
- August 7th

### NOVEMBER RELEASE
- November 6th

#### 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
- Glanceability
- Related Items
- IEDL Reporting in OBI (NERS)
- Other OBI Reporting
- Summon Over Alma: (April) Publish Collection Level URL with Electronic Holdings

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

#### November 2019
- Linked Data
- Improved handling of video content (content type and thumbnail improvements)
- Topics: Recall/Precision Improvements
- Open Access Facet Reporting
USER EXPERIENCE
Glanceability

USER EXPERIENCE

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

**USER EXPERIENCE**

- Customize facets to meet your specific institutional and user needs
- Control look and feel of Facets
- Change order of facets
- Determine which are included and which are collapsed or expanded by default

**Customer Value**

**Feature Highlights**

© 2019 Ex Libris | Confidential & Proprietary
Video Improvements

**User Experience**

- Better treatment of video content in Summon results

**Customer Value**

- Improved treatment of video metadata
- Exposure of data and facets related to metadata
- Display of thumbnails
LIBRARY EMPOWERMENT
**IEDL Reporting**

**LIBRARY EMPOWERMENT**

<table>
<thead>
<tr>
<th>Customer Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Determine what content is being used and how it is being accessed from Summon</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Feature Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Report on click path from Summon results to content</td>
</tr>
</tbody>
</table>
Reporting on additional OBI Click Data

**LIBRARY EMPOWERMENT**

**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
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

<table>
<thead>
<tr>
<th>Customer Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Provide access to a world class course reserve list management tool</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Feature Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Seamless integration of Leganto functionality with Summon, including creation and management of reading lists and delivery of results via Summon</td>
</tr>
</tbody>
</table>
SEARCH AND EXPLORING
Related Items

SEARCH AND EXPLORING
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

Ex Libris | Confidential & Proprietary
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)
Summon and CDI
Discovery: One Strategy, Different Flavors

Primo

- New Primo UI: Now used by over 90% of Primo customers
- Primo VE: Now serving 250+ institutions
- Primo Studio (AppCenter)

2016 - 2019

Summon

- Part of Ex Libris platforms: Knowledge Center, Idea Exchange, Status Page, Dev. Network
- Summon over Alma: Now serving 30+ institutions

© 2019 Ex Libris | Confidential & Proprietary
Discovery: One Strategy, Different Flavors

Joint content operations

Joint discovery services

Central Discovery Index

2016

2017

2018

2019
Central Discovery Index

Unified index for Primo & Summon

- Comprehensive and scalable
- Future-ready

- Faster ingest & updates, better quality data
- Smart services based on contextual relations
- Data intelligence as a core part of our discovery systems
Navigating the Big Data Ocean...

Cocoa and chocolate flavonoids: Implications for cardiovascular health
Steinberg, Francene M; Bearden, Monica M; Keen...
Classifying Data

Cocoa and chocolate flavonoids: Implications for cardiovascular health
Steinberg, Francene M; Bearden, Monica M; Keen...
Forming Data Relations

- Citing
- Cited by
- Other articles of the same journal issue
- Topics of this article
- Used together with
- Research data used
- Other articles of the same author

Cocoa and chocolate flavonoids: Implications for cardiovascular health
Steinberg, Francene M; Bearden, Monica M; Keen...
Creating Intelligent Discovery Experiences

Cocoa and chocolate flavonoids: Implications for cardiovascular health
Steinberg, Francene M; Bearden, Monica M; Keen...
THANK YOU!

Brent.Cook@ExLibrisGroup.com