Summon Update and Q&A

October 2019

Brent D. Cook
Director of Product Management, Summon
• Highlights of Summon Performance and Recent Improvements
• November Quarterly Release
• CDI Update
• 2020 Summon Roadmap Planning
Highlights of Recent Improvements
### Summon 2019 Release Schedule

#### 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
- Summon Over Alma: (April) Publish Collection Level URL with Electronic Holdings

#### August 2019
- Public Notes in Summon Results (NERS)
- Integration with Leganto
- Improved Facets (NERS)
- Open Access Facet Reporting

#### November 2019
- Linked Data
- Improved handling of video content
- Topics: Recall/Precision Improvements
- IEDL Reporting in OBI (NERS)
- Unpaywall
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
**Summon 2019 Release Schedule**

**FEBRUARY RELEASE**
- February 6th

**MAY RELEASE**
- May 15th

**AUGUST RELEASE**
- August 7th

**NOVEMBER RELEASE**
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Glanceability

USER EXPERIENCE

• Add visual indicator to help patrons better find the results they need as they scan the results
Related Items

SEARCH AND EXPLORING

Encyclopedia of marine mammals
by Perrin, W. F.; Würsig, Bernd G.; Thewissen, J. G. M.
2002
Book: Check Availability, QL173.2.E53 2002

The encyclopedia of sea mammals
by Coffey, David J.; Caldwell, David K. 1928-1990, (David Keller); Caldwell, Melba C.
1977
Book: Check Availability, QL173.2.C63 1977b

Marine mammals: biology and conservation
by Evans, Peter G. H.; Raga, Juan Antonio

Reviews and Chapters

Book Reviews  Chapters

CHOICE

Encyclopedia of Marine Mammals
by Sabin, R.G.
CHOICE: Current Reviews for Academic Libraries, 10/2002

Book Review
Citation Online
Summon over Alma Improvements in June

- Ability to suppress duplicate links when Catalog E inventory merges with a Provider record
- Ability to disable or enable columns in the Course Reserves view
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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**
Public Notes

**USER EXPERIENCE**

- Exposure of information related to resources your institution subscribes to
- Display of Database Notes, Database All Title Notes, Title Level Notes and Title Location Notes

**Feature Highlights**

**Customer Value**

**Public Notes**

This database contains research outputs from Universities around the world. Some content is open access, some is available as abstract only. Some of the content in this title may be available in full text.
# Integration with Leganto Course Reading List Solution

## Customer Value

- Provide access to a world class course reserve list management tool

## Feature Highlights

- Seamless integration of Leganto functionality with Summon, including creation and management of reading lists and delivery of results via Summon
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
## 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
- The report, “Title Clicks,” can be found in the Summon Community folder
Summon November Quarterly Release
# Summon 2019 Release Schedule

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# Linked Data

## Customer Value

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

## Feature Highlights

- November release will represent backend development and ensuring data quality
- Release of site map to improve indexing via search engines (Google, in particular) targeted for Q1 2020
# Video Improvements

## User Experience

**Customer Value**

- Better visual treatment of video content in Summon results

**Feature Highlights**

- Additional thumbnail images for video content
- Play icon with video player functionality
Topics: Recall and Precision

SEARCH AND EXPLORING

- Ensure recommendations from Topic Explorer are relevant to the user’s needs
- Improvement for updates for Wikipedia

From Wikipedia, the free encyclopedia

Mantis Shrimp

Mantis shrimps, or stomatopods, are marine crustaceans of the order Stomatopoda. Some species have specialised calcified “clubs” that can strike with great power, while others have sharp forelimbs used to capture prey. They branched from other members of the class Malacostraca around 400 million years ago. Mantis shrimps typically grow to around in length. A few can reach up to . The largest mantis shrimp ever caught had a length of and was caught in the Indian River near Fort Pierce, Florida, in the United States. A mantis shrimp’s carapace (the bony, thick shell that covers crustaceans and some other species) covers only the rear part of the head and the first four segments of the thorax. Varieties range from shades of brown to vivid colors, as more than 450 species of mantis shrimps are known. They are among the most important predators in many shallow, tropical and subtropical marine...
Addition to Release—Unpaywall

**SEARCH AND EXPLORING**

**Customer Value**

- Additions of direct links to PDFs from Unpaywall in search results

**Feature Highlights**

- Access to full text without the need for additional log in information
- Initial release will include links to PDFs; will not include facet functionality
Addition to Release—Uniform Title Field

**SEARCH AND EXPLORING**

**Customer Value**

- Uniform Title field is now part of default search

**Feature Highlights**

- Discover records using alternative titles
- Find records using known titles for works that may be untitled or have known variations on a title
# Addition to Release—Advanced Search options

## SEARCH AND EXPLORING

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<td>More alternatives for search precision on the Advanced Search page</td>
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<td>Ability to search by Match All, Match Exact, or Match Any</td>
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CDI: Central Discovery Index
Discovery trends and strategy
A New Discovery Index

Central Discovery Index
Future-ready
- Unified index for Primo & Summon
- Includes a graph database to create relations

Operational efficiency
- Faster ingest
- Faster updates
- Better quality data
- Single point of activation (for Primo)

Focus on data intelligence – Smart services based on contextual relations
- Exploration with formal and informal relationships
- Context and glanceability
Current Status

• Release moved to Q1 2020
  • Shift will allow for addition of new improvements

• Transition should be seamless
  • No change in User Interface
  • No changes to API
  • Any additional features will be configurable and can be viewed in Preview prior to activation

• Upgrade should be the equivalent of a monthly maintenance release
Roadmap Planning for 2020
Roadmap Development Process

• Over the next two months, we will compile priorities from a variety of resources:
  • Idea Exchange
  • NERS
  • Topic Explorer and DB Recommender Focus Group
  • Analytics Working Group feedback
  • Summon over Alma needs
  • Product development goals
• Roadmap candidates will be scored for inclusion
  • Benefit to product
  • Level of effort / cost
Idea Exchange / NERS

• Current top ideas:
  • Provide the ability to separate books and ebooks when searching.
  • Add 'date last updated' to database details
  • Better display of 5xx fields
  • Make "Best Bets" show up when tag keywords are present in search, not just when there's an exact match
  • Add a custom JS/CSS field to simplify UI customization
  • Integrate LibGuides Database A-Z list into Summon search
  • Displaying all links available in Summon results page

• Will also include top results from NERS, which pulls from Idea Exchange
Topic Explorer and DB Recommender Focus Groups

• Topic Explorer
  • Improved bias reduction (addition of management tools, better documented processes)
  • Better documentation of relevance calculation
  • Improve UI, including focus on accessibility and mobile
  • Improve related topics

• Database Recommender
  • Improve activation process
  • Improve ranking and curation of sources
  • Improved matching

• Better backend tools for management
OBI Improvements

- Ability to track advanced searches
- IP address reporting
- Add “exclude” tracking for facet reports
- Provide better access to reports
- Expand clicks reported
Upcoming Events
Upcoming Webinars

• Summon Customer Sessions
  • November 6 – “Interface Configurations”
  • February 5 – “Integration and Interoperability with Other Products”

• Customer Success sessions
  • December 3 & 4 – “Undergraduates and Discovery”

• To be scheduled soon:
  • Content quarterly webinar – November 19
  • Summon customer session focused on analytics – January 22
  • Summon Quarterly Update and Roadmap Review – January tbd
Upcoming Event: Charleston Conference

• Luncheons & Receptions
  • Ex Libris: Central Discovery Index – Putting Data Intelligence at the Core of Discovery (Wed., Nov. 6, 11:30 – 12:45pm)
  • ProQuest: Acquisition for Academic Libraries – It’s an Art and a Science (Thurs., Nov. 7, 11:30 – 12:45 pm)*
  • ProQuest Happy Hour (Thurs., Nov. 7, 6:00 – 8:00 pm)*

• Sessions of Interest for Ex Libris customers
  • Acting Up! Standards Improv and the Importance of Cross-Stakeholder Collaboration (Wed., Nov. 6, 2:00 – 3:10 pm)
  • State of the Academic Library: Results from the 2019 Academic Libraries Survey (Wed., Nov. 6, 3:30 – 4:10 pm)
  • Acquiring Teamwork: Resource lifecycles utilizing Alma and each other (Wed., Nov. 6, 5:30 – 6:10 pm)
  • APIs: A Tool for Many Things, including Collections Analysis (Wed., Nov. 6, 5:30 – 6:10 pm)
  • The time has come... to MOVE Many Things: Inventoring and Preparing a Collection for Offsite Storage (Wed., Nov. 6, 6:20 – 7:00 pm)
  • From Rural Publics to Urban Universities: Implementing Discovery at a Statewide Level (Thurs., Nov. 7, 10:45 – 11:25 am)
  • Six impossible things: Moving KBART into the next decade (Thurs., Nov. 7, 10:45 – 11:25 am)
  • Resource Discovery in a Changing Content World (Thurs., Nov. 7, 3:30 – 4:10 pm)
  • Do you talk to your VPR? Building relationships with the research office (Nov. 7, 3:30 – 4:10 pm)
  • Reframing the Relationship: Perspectives on Library-Vendor Partnerships (Fri., Nov. 8, 10:45 – 11:25 am)

• Vendor Showcase
  • Tuesday, Nov. 5, 10:30 am to 6 pm (table #81)

*ProQuest: https://go.proquest.com/Charleston2019
Thank you!

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