

2020 Summon Roadmap

January 2020

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- Current 2020 Summon Roadmap
- Highlights of February Release and Launch of CDI for Summon
- Highlights of Q2-Q4 Releases
- Upcoming Events and Webinars



2020 Roadmap Update

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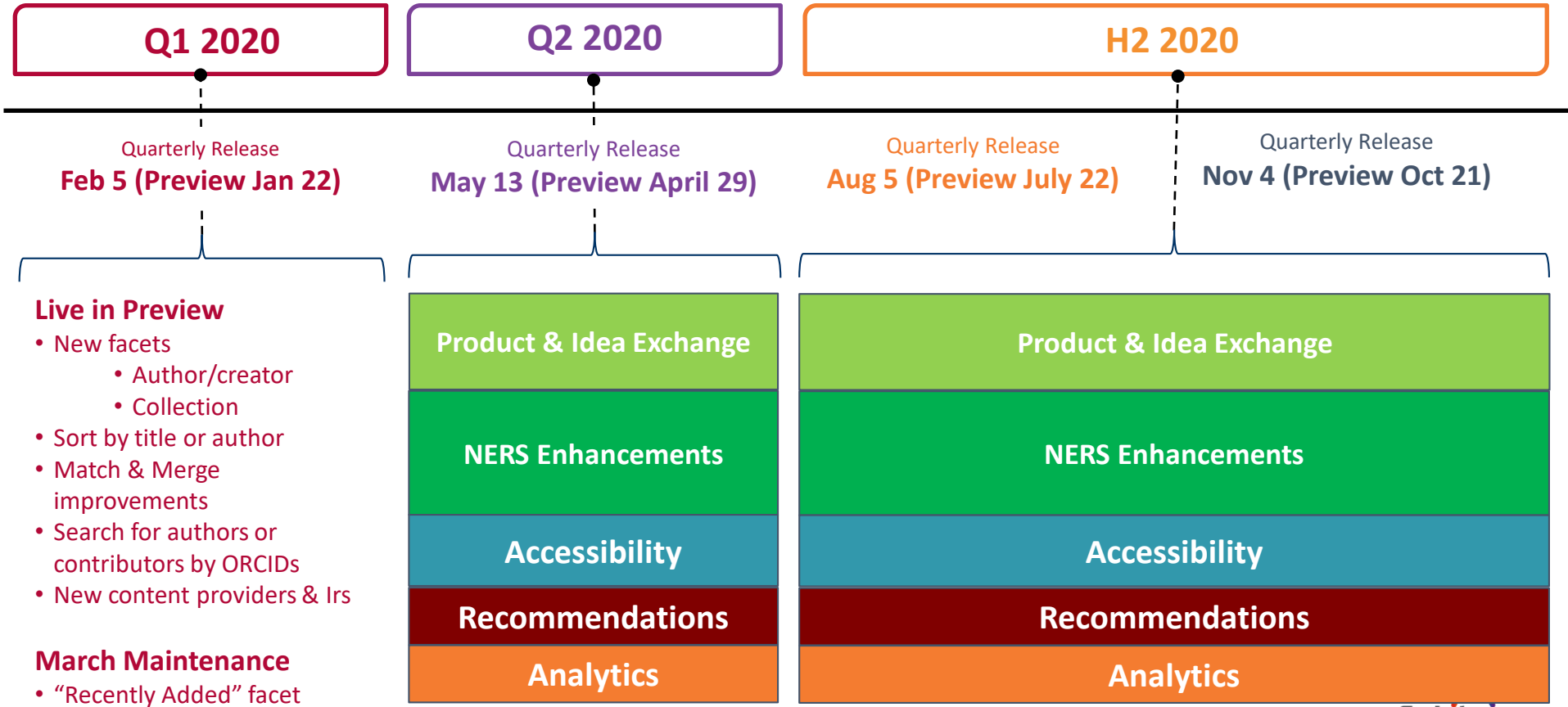
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Roadmap In Final Review

- The information provided in this presentation gives a high level view of Summon's planned 2020 roadmap.
- Timing and feature set may shift based on final set of proposed features, including the enhancements identified by the NERS process.
- Any updates and final details for the 2020 Summon Roadmap will be published in the Ex Libris Knowledge Center.

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Summon 2020 Release Schedule



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February 2020 Release

Introduction of CDI and New Features

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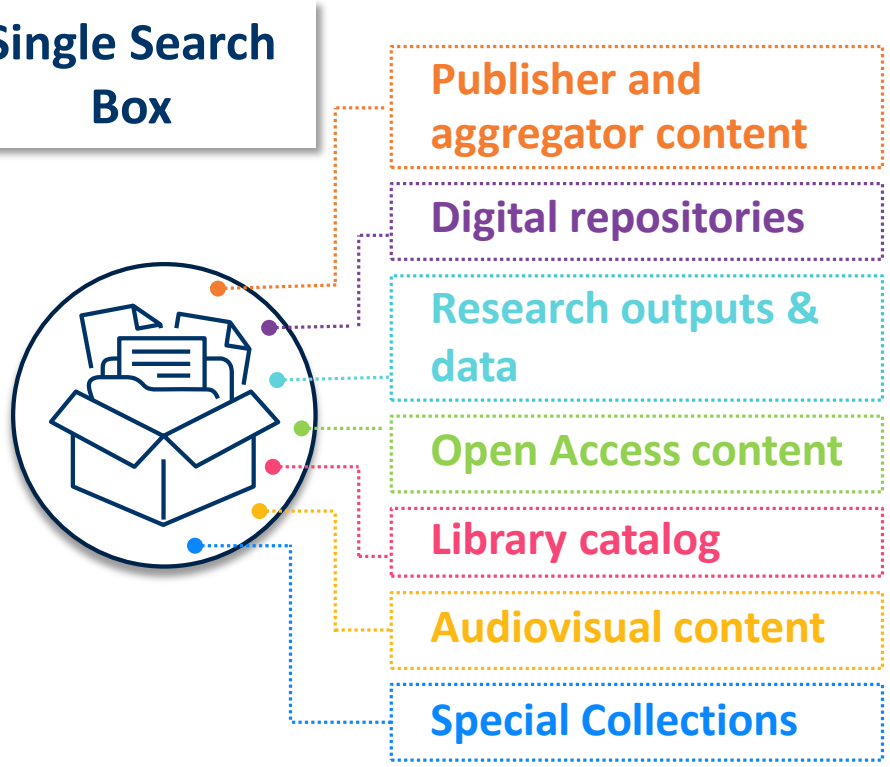
CDI: Addressing Discovery Challenges

Steep increase of available material

- More material
- More diverse material types

User expectations change

- Increased influence of social media and consumer platforms on user perception
- Expectation from faculty for users to use more diverse material



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CDI: Addressing Discovery Challenges





- Publisher and aggregator content
- Digital repositories
- Research outputs & data
- Open Access content
- Library catalog
- Audiovisual content
- Special Collections

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Central Discovery Index (CDI)

Empowering Ex Libris higher-ed solutions

- Comprehensive coverage & material types
- High-quality metadata and deduplication
- Smart exploration services
- Scalable and modern

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CDI is Alive and Kicking!

New implementations are starting with CDI



Summon customers seamlessly switch in February 2020

First existing Primo customer is live with CDI. All others will switch by November 2020

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Preview Environment Live with Summon on CDI

Live Now in Preview

- New facets
  - Author/creator
  - Collection (Database)
- The ability to sort results by title or author
- Match & Merge improvements
- Search for authors or co-authors by ORCID IDs
- New content providers and institutional repositories

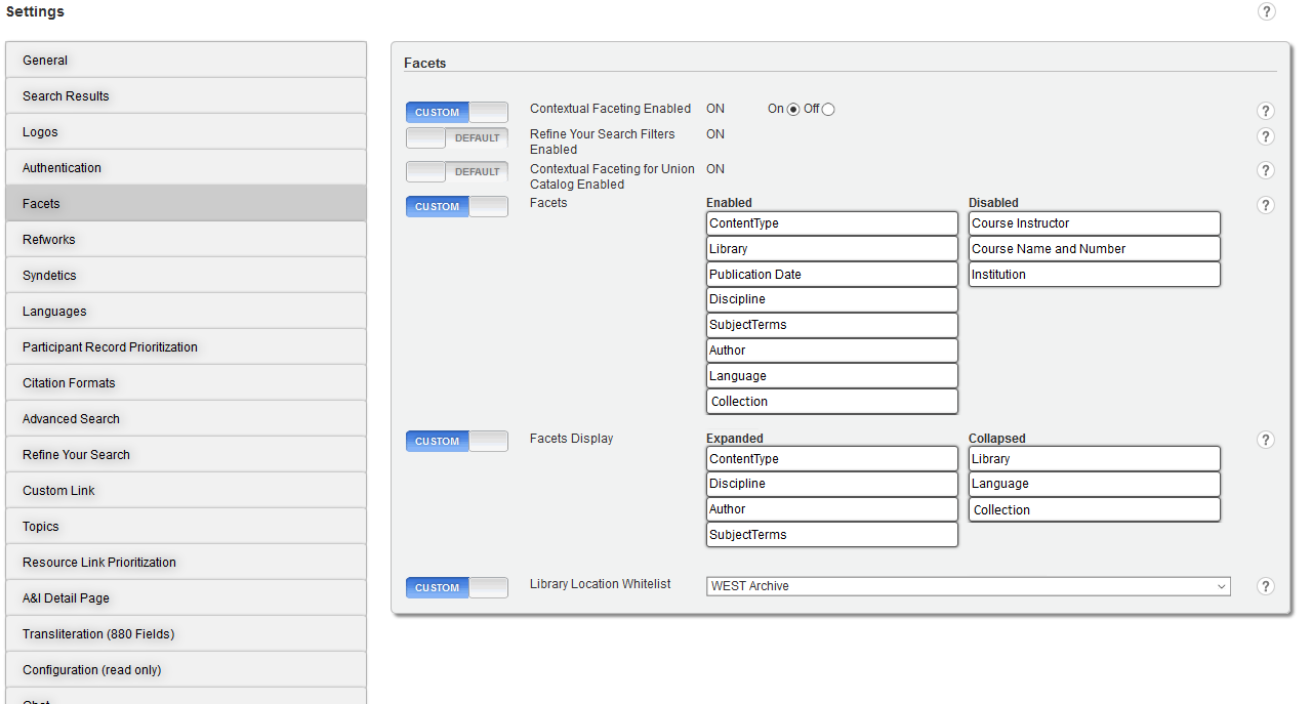
Available in Production

- Improved performance and upgrade to SOLR 7

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New Facets

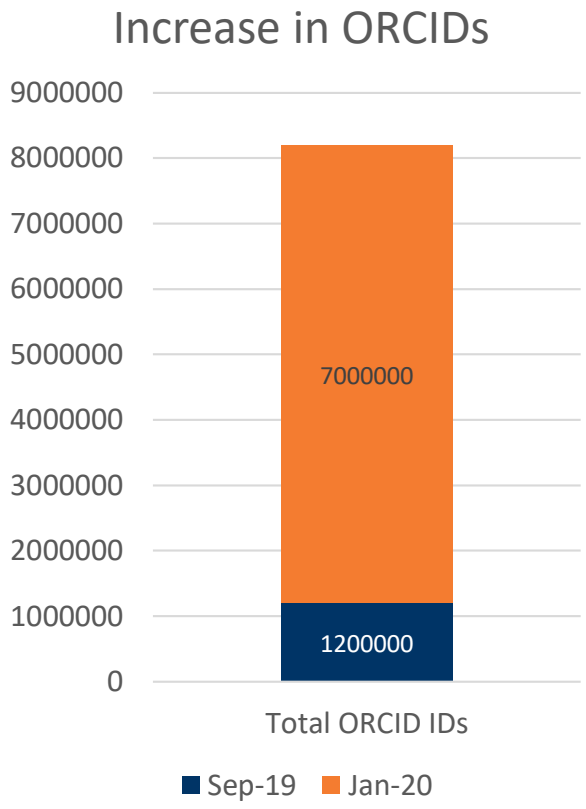
- Author/creator
- Collection (Database)
- The ability to sort results by title or author
- Recently added items facet coming in March



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Search by ORCID

- Expanded to include both authors and contributors
- 8.4 million ORCIDs in the index
  - Up from 1.2mil in Sept
- Supported as field query search
  - ORCID:0000-0000-XXXX-XXXX



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Content Growth

- 225 million Open Access records in the index
  - Up from 200 million at the beginning of 2019
  - 61 new open access Institutional Repositories available
- 38 new providers
- 3.944 billion records in the index
  - Increase of over half a billion records
  - Started 2019 with over 3.430 billion records

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Highlights of Q2-Q4 Releases

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Proposed Improvements

Product Improvements



Idea Exchange

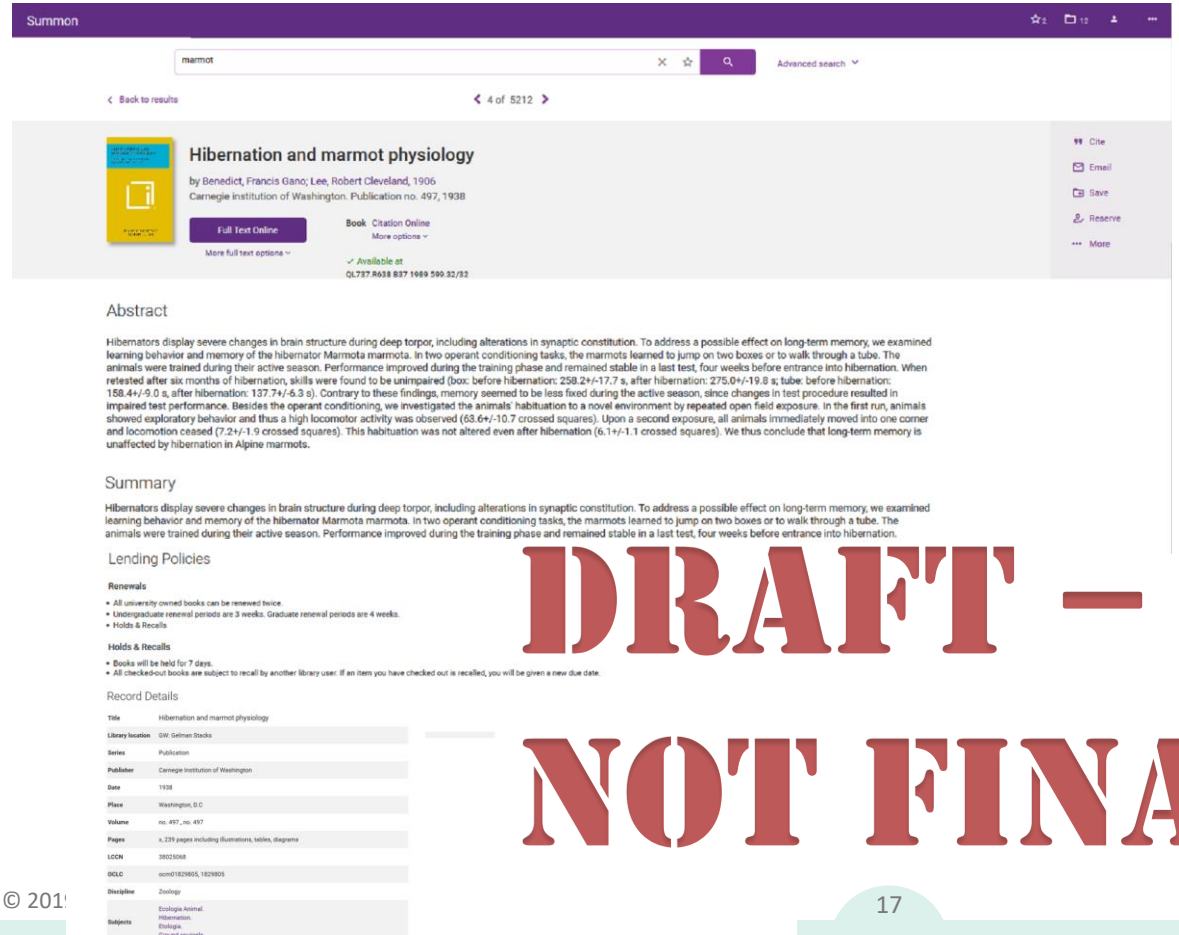
- Linked Data: Landing Page and Management Tools
- Unpaywall Facets
- Custom Citation Styles
- Chat Widget Improvements (including WhatsApp integration)

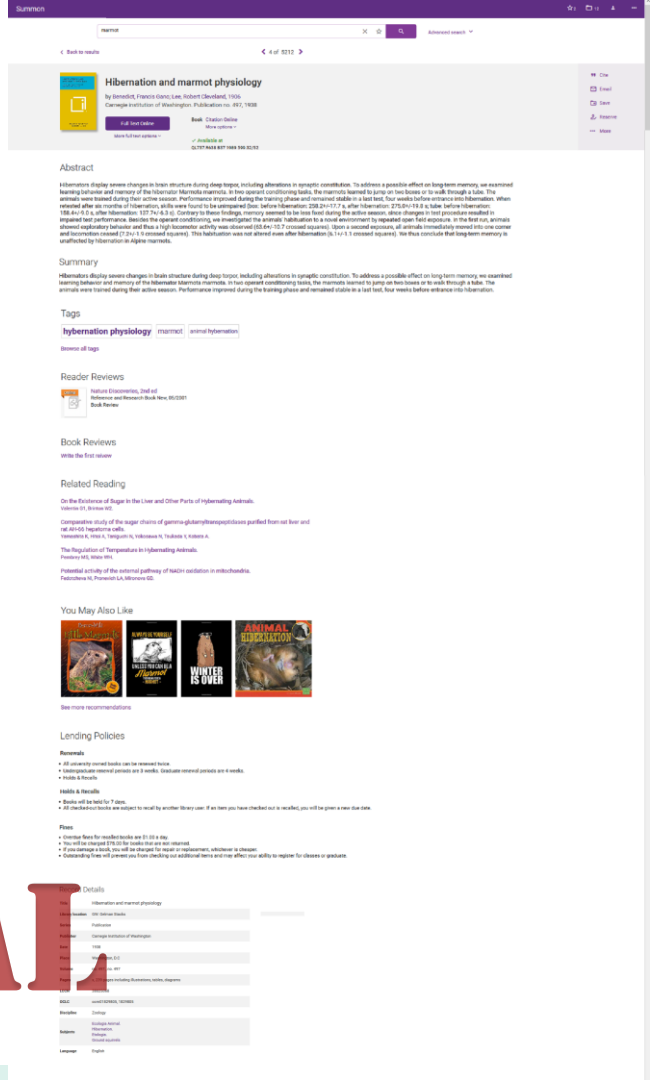
- Provide the ability to separate books and ebooks when searching
- Add 'date last updated' to database details
- Make “Best Bets” show up when tag keywords are present in search, not just when there's an exact match
- Better Display of 5xx Fields
- Add a custom JS/CSS field to simplify UI customization

Scope and number of features is dependent on complete final feature set

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Linked Data: Landing Page





DRAFT – NOT FINAL

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Accessibility



ACCESSIBILITY

- Q1:
  - Internal audit for WCAG 2.1 compliance and review of outstanding customer recommendations
- Q2:
  - 3rd party audit for WCAG 2.1 compliance
  - Suggested improvements will be scheduled for Q2 and Q3 releases

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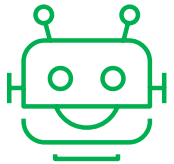
New Enhancement Request System

- Add 'date last updated' to database details
- Add SAML/federated/"Shibboleth" login option for saved searches
- Distinguish between author and editor in Summon results and citations
- Keep search refinements when moving to Advanced search
- Databases A-Z List within Summon
- Label peer-review results as such
- Flag IEDL content in the KB
- Mechanism for Best Bets to 'harvest' LibAnswers FAQs (from SpringShare)
- Add scroll bar for facet column
- Display edition and publication year in brief results, for books and ebooks
- Add Section number to Course ID in Course Reserves page
- OBI usage statistics : Access source IP address
- Consistent link back to search results
- Clearing search will not let the user enter a new search directly

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Topic Explorer and DB Recommender

- Based on work being completed by the Topic Explorer and DB Recommender Focus Group



RECOMMENDATIONS

- Initial targets
  - Addressing bias in Topic Explorer: better documented processes
  - Better documentation of relevance calculation for Topic Explorer
  - Improve activation process for DB Recommender, particularly ranking and curation of sources

- Review of UX and potential bias in relevance will drive features for H2
  - Addressing bias in Topic Explorer: addition of management tools
  - Improved UI, including better display on smaller screens for Topic Explorer

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Continued Improvements on OBI

- IP address reporting
- Add “exclude” tracking for facet reports
- Ability to track advanced searches
- Provide better access to reports
  - Sharing and log in requirements
- Fixes
  - Popular Searches by Week
  - Sessions Usage Report



ANALYTICS

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Additional Ideas for 2020?

- The roadmap captures high level initiatives
- We maintain room for specific customer requirements, regional needs, and other contingencies
- Please keep the ideas coming:
  - Via the Idea Exchange
  - Direct feedback



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Upcoming In-Person Events & Webinars

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Upcoming In-Person Events and Webinars

Events

- March 8-11: ER&L (Austin, TX)
  - https://page.exlibrisgroup.com/erl2020conference
- May 4-8: ELUNA & Developers Day (Los Angeles, CA)
  - https://el-una.org/meetings/eluna-2020/
  - *Proposals being accepted through January, 17*

Webinars

- *Customer Session: Integration and Interoperability with Other Products*
  - February 5 at 8:00 am (San Francisco)
  - Steve Brown (E-resources Access Manager, University of Colorado - Boulder); James Day, Electronic Services Librarian (Embry-Riddle University)

Register at http://bit.ly/Summon-webinars

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Thank you!

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