Relevance Ranking in Summon

Sian Blake, Customer Success Manager

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Objectives

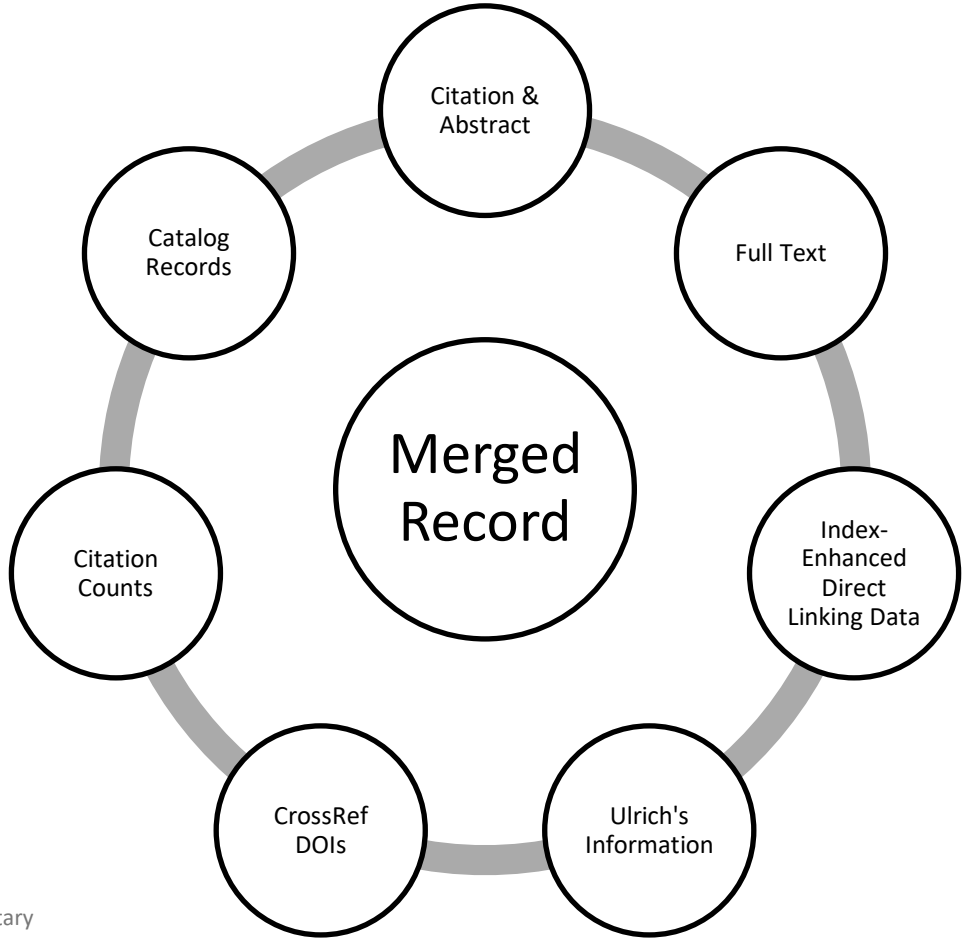


- Understand the Dynamic and Static factors that Summon uses to rank results
- Understand how Full Text searching can affect search results
- Demonstrate how Facets can help refine results and manage high result counts
- How to send feedback on relevance ranking

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Key Concept: Merged Record





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Key Concept: Relevance Ranking

Dynamic Ranking (Search Terms)	Static Ranking (Item Attributes)
Term Frequency	Content Type
Field Weighting	Publication Date
Stop Word Processing	Peer Review / Scholarly Status
Synonym Mapping	Citation Counts
Stemming	Local Collections



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What this looks like in practice

- Topical Search

  “I’m researching the effects of climate change on coffee production”

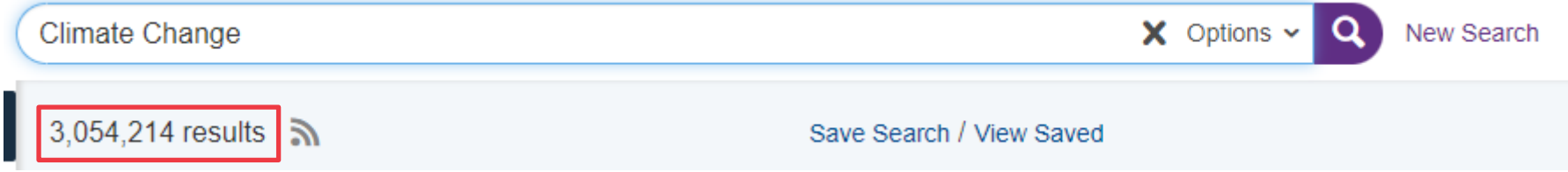
- Known Item search

  *“I need a copy of **No Country for Old Men** for my seminar”*

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Full Text Searching – Pros and Cons



- From March release, Full Text searching is optional, and the default is OFF
- You can set it back to ON or add a Search in Full Text facet
  - The facet allows you and your users full flexibility over whether Full Text is included in search or not
- Configure under Settings > Refine Your Search >

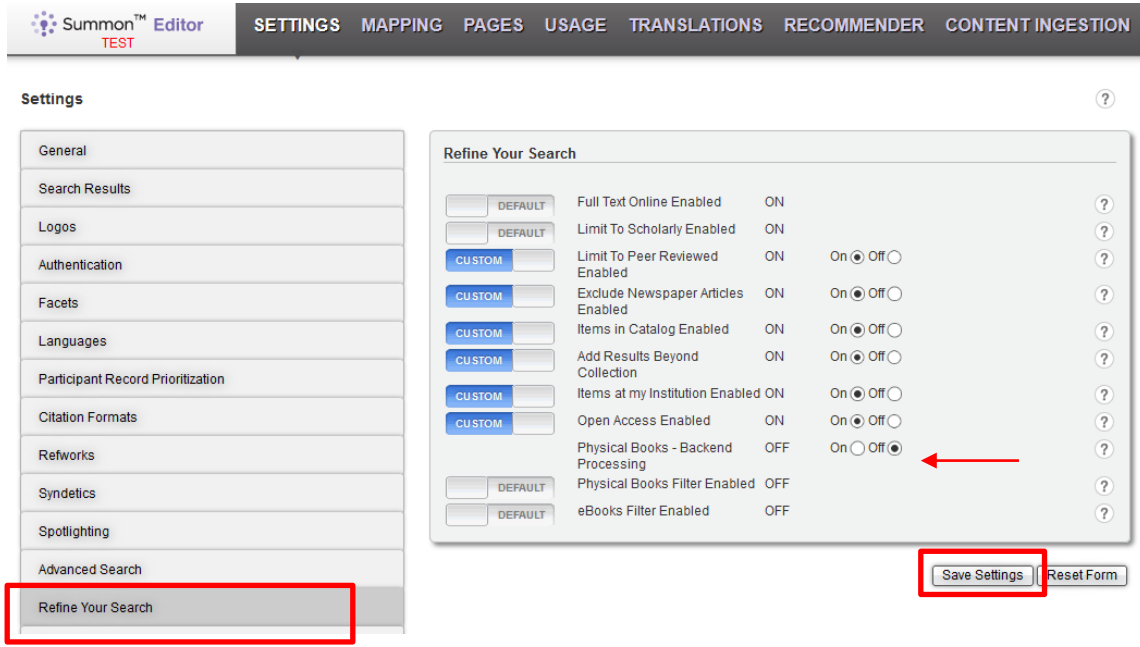


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Separate Print from eBooks—Configuration

- Found under Settings > Refine Your Search
- First turn on “Physical Books – Backend Processing”
  - You’ll need to wait for an index update to be completed before the facet is ready
  - This process will not affect the existing Book/Ebook facet

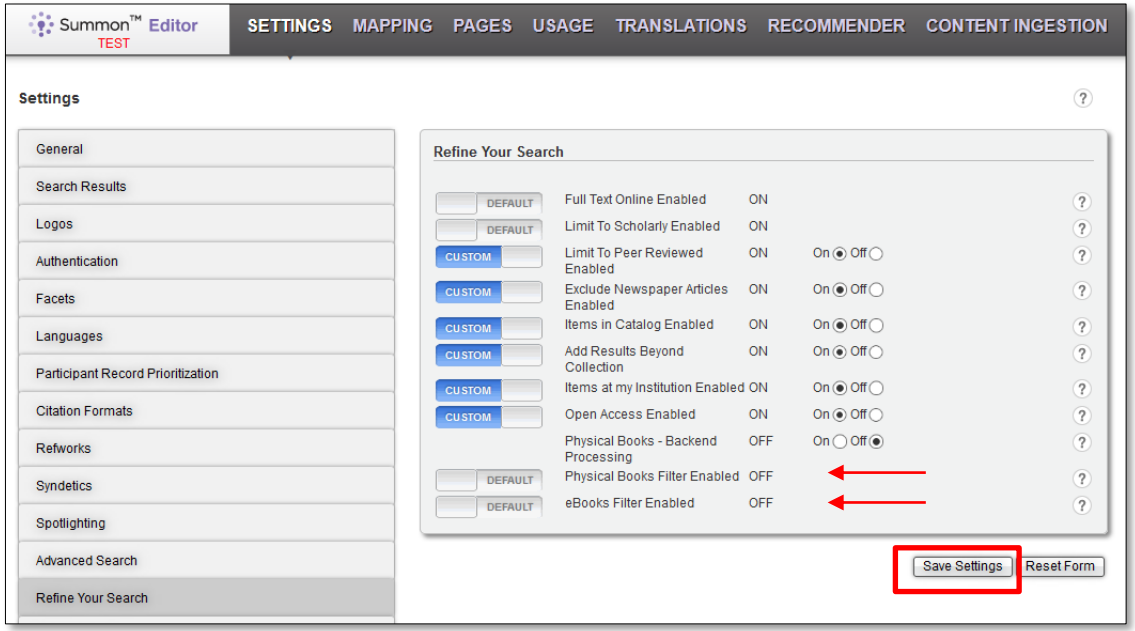


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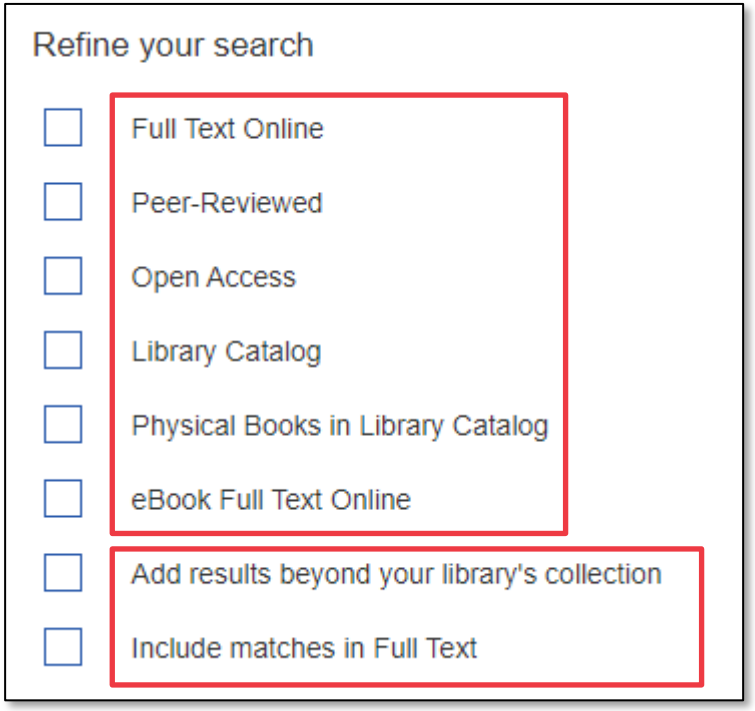
- Once an index process has been completed with the backend processing enabled you can turn on the facets
- For Print set “Physical Books Filter Enabled” to On
- For electronic books set “eBooks Filter Enabled” to On
    - Facets will appear within 5 minutes after enabled, or disappear if disabled



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Refine Your Search



Narrow your Search

Expand your Search

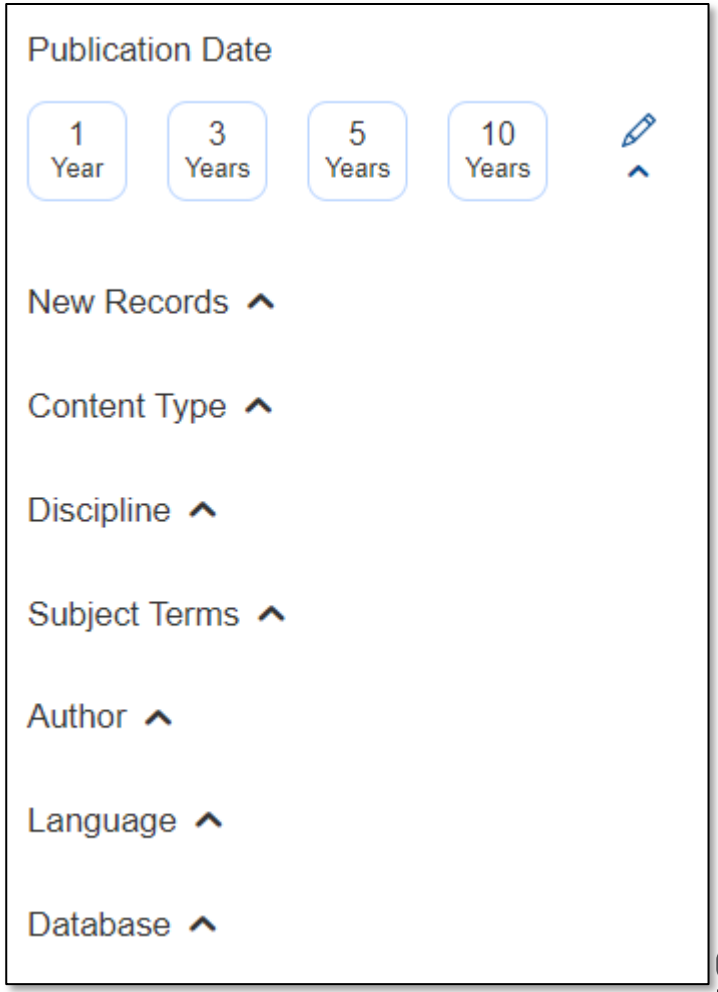
- Each facet can be enabled / disabled
- Configure under Settings > Refine Your Search
- Use the Translations tab to re-label any facet

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Other Facets…

- Targeted vs Contextual
- Configure under Settings > Facets
- Choose display order and which facets to collapse / expand
- Use Translations tab to re-label any facet



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Use the Preview Environment for testing

- Access the Preview UI at http://<*CLIENT*>.preview.summon.serialssolutions.com
- Access the Preview Admin Console via the top right link from your Summon Admin Console:



- Preview uses Live CDI, so you can see how Facets will behave with your own content and activations

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Documentation and Feedback

- How does the Summon service determine the order of search results?
- What are Summon search results facets and refinements?

- Send feedback to summon.relevance.feedback@proquest.com
  - Subject line: Relevance feedback from <your institution name>
  - Include query string, facets selected, URL of search, screenshots if necessary and explanation of issue

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Questions?

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Thank you!

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