

Summon Update and Q&A

July 2019

Brent D. Cook
Director of Product Management, Summon

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- Highlights of Summon Performance and Recent Improvements
- 2019 Summon Roadmap
- 360/Intota Update
- CDI Update
- Upcoming Webinars

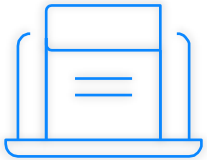
Roadmap Areas and Highlights



SEARCH AND EXPLORING



USER EXPERIENCE



LIBRARY EMPOWERMENT



OPEN SYSTEM

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Highlights of Recent Improvements

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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
- 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

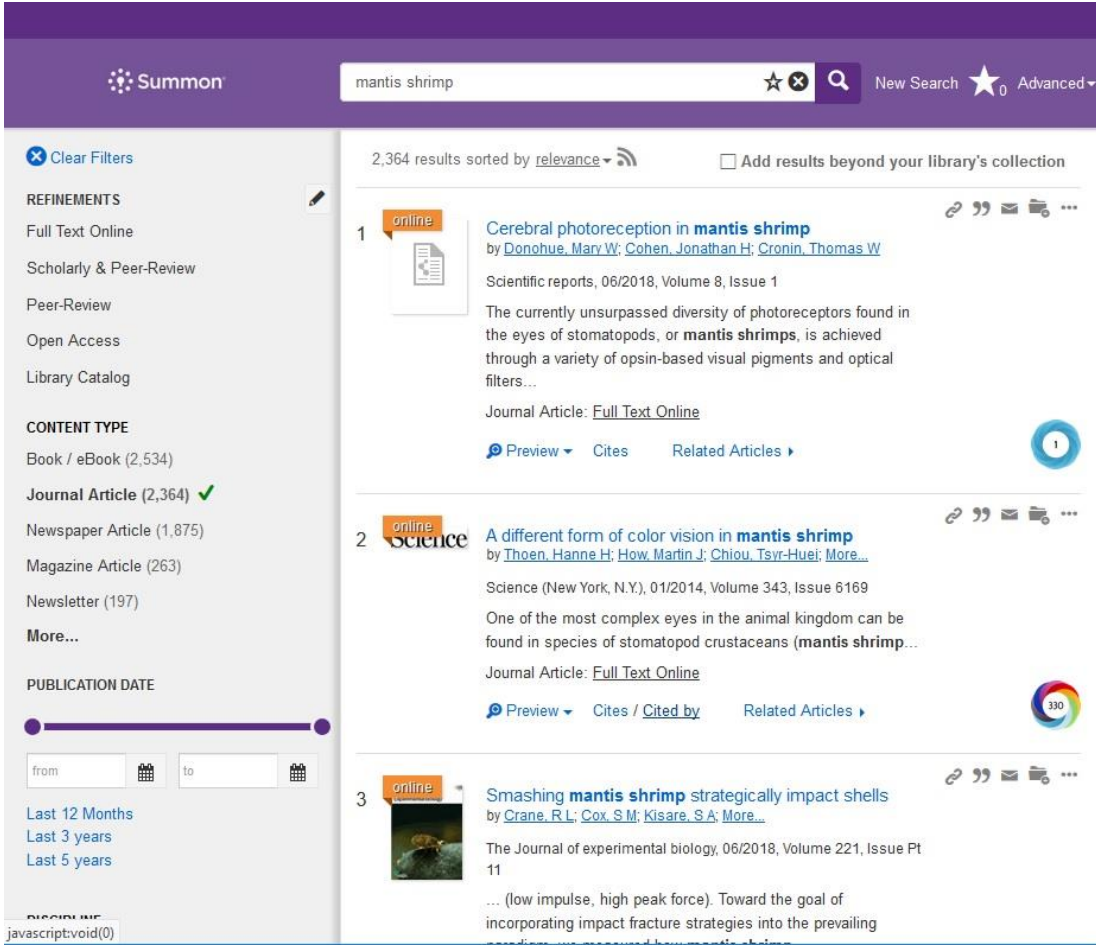
- Linked Data
- Improved handling of video content (content type and thumbnail improvements)
- Topics: Recall/Precision Improvements
- IEDL Reporting in OBI (NERS)

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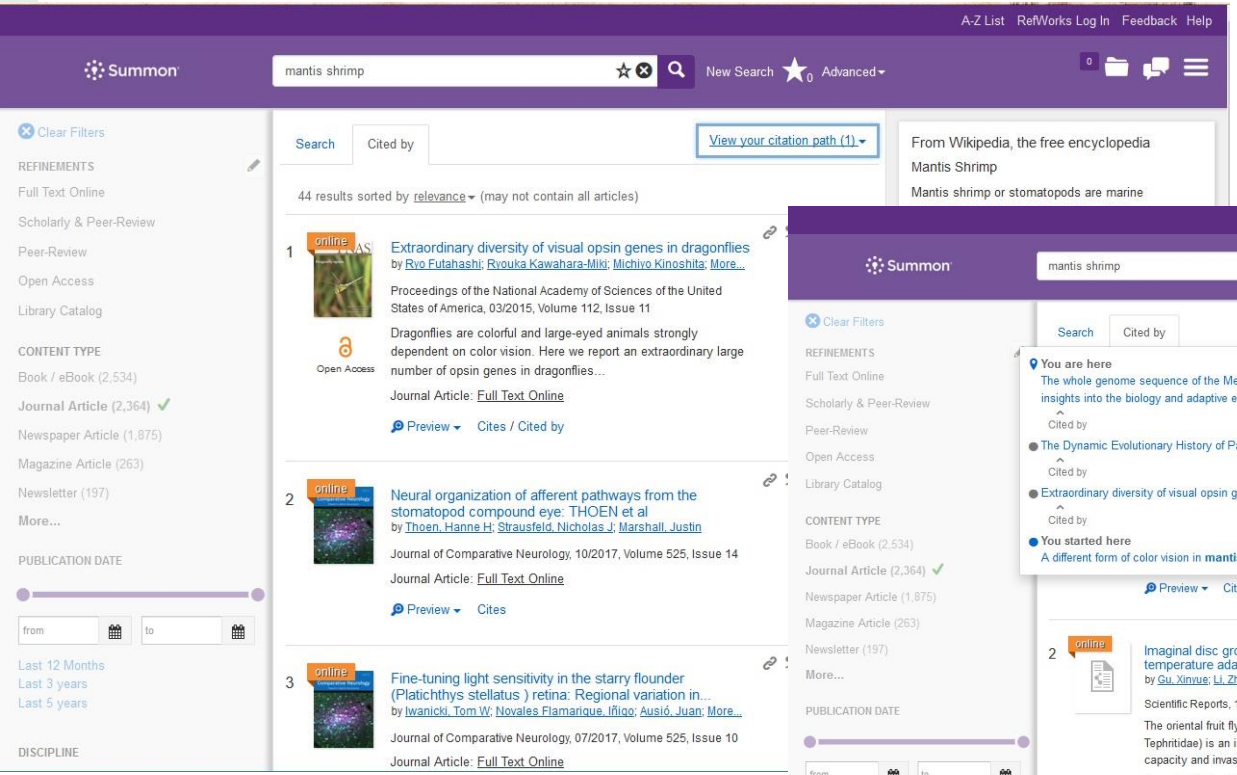
Citation Trail

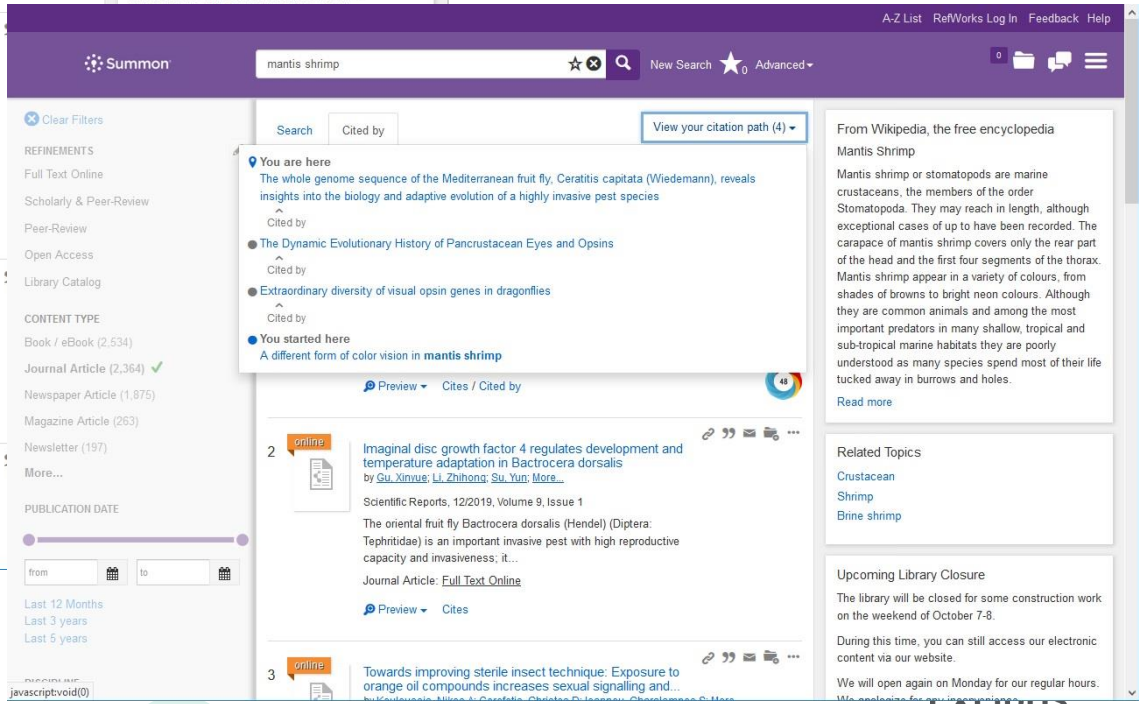
- Follow citations within a search result to access articles cited in current record to discover new content
- Explore and discover texts using citations within text as navigation
- Follow citations within a text or find texts that cite the article



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Citation Trail





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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



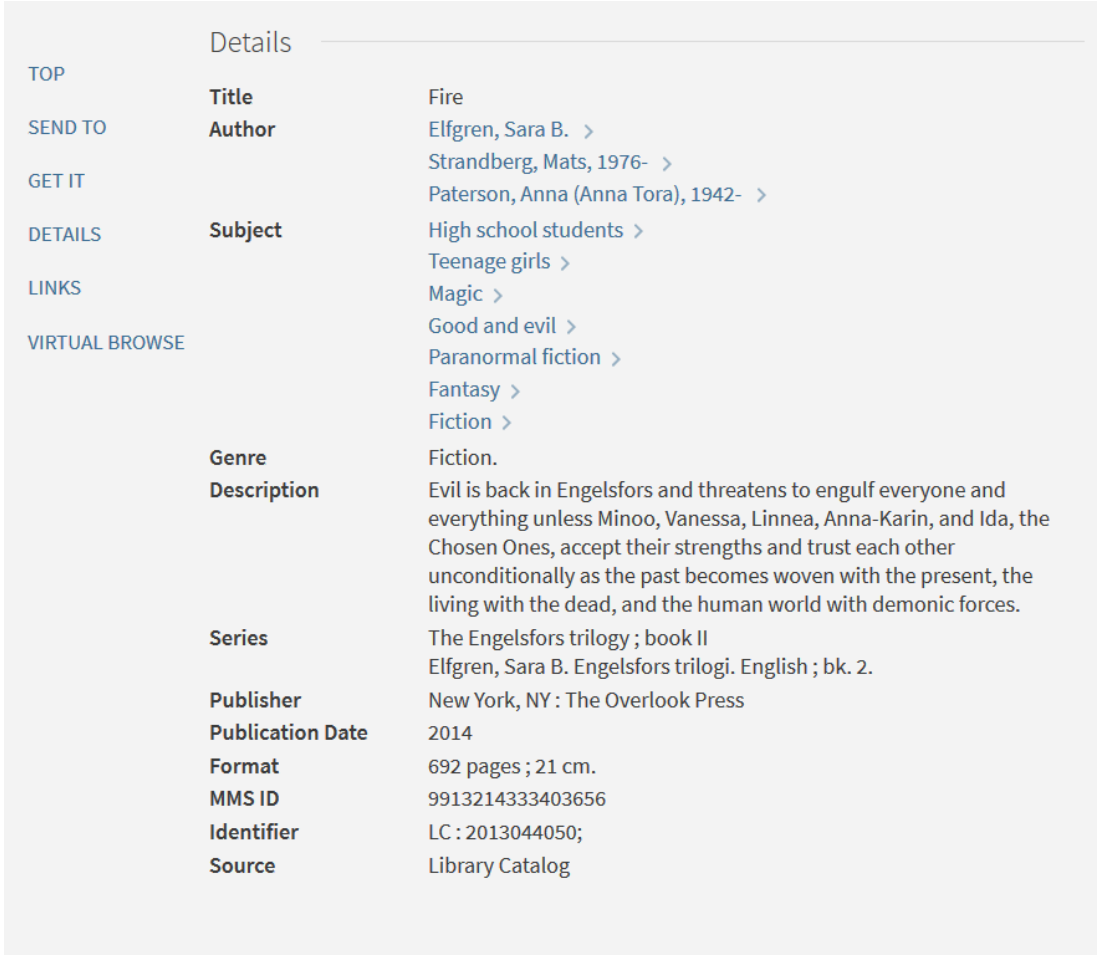
Feature Highlights

- 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

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Summon over Alma

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



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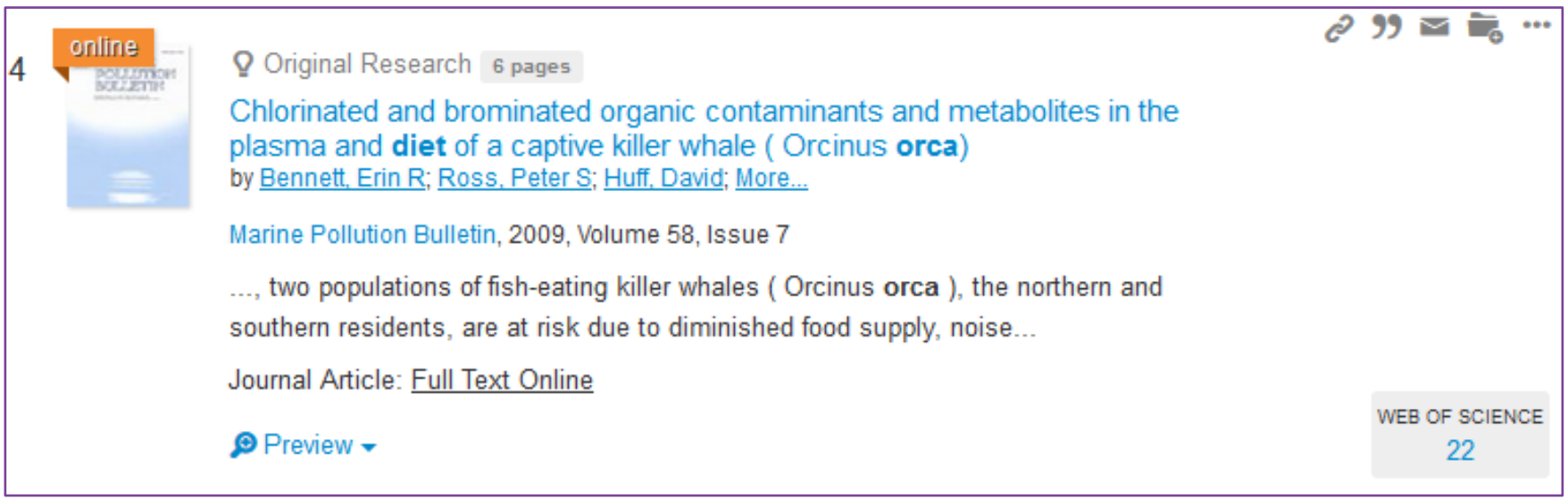
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Glanceability

USER EXPERIENCE

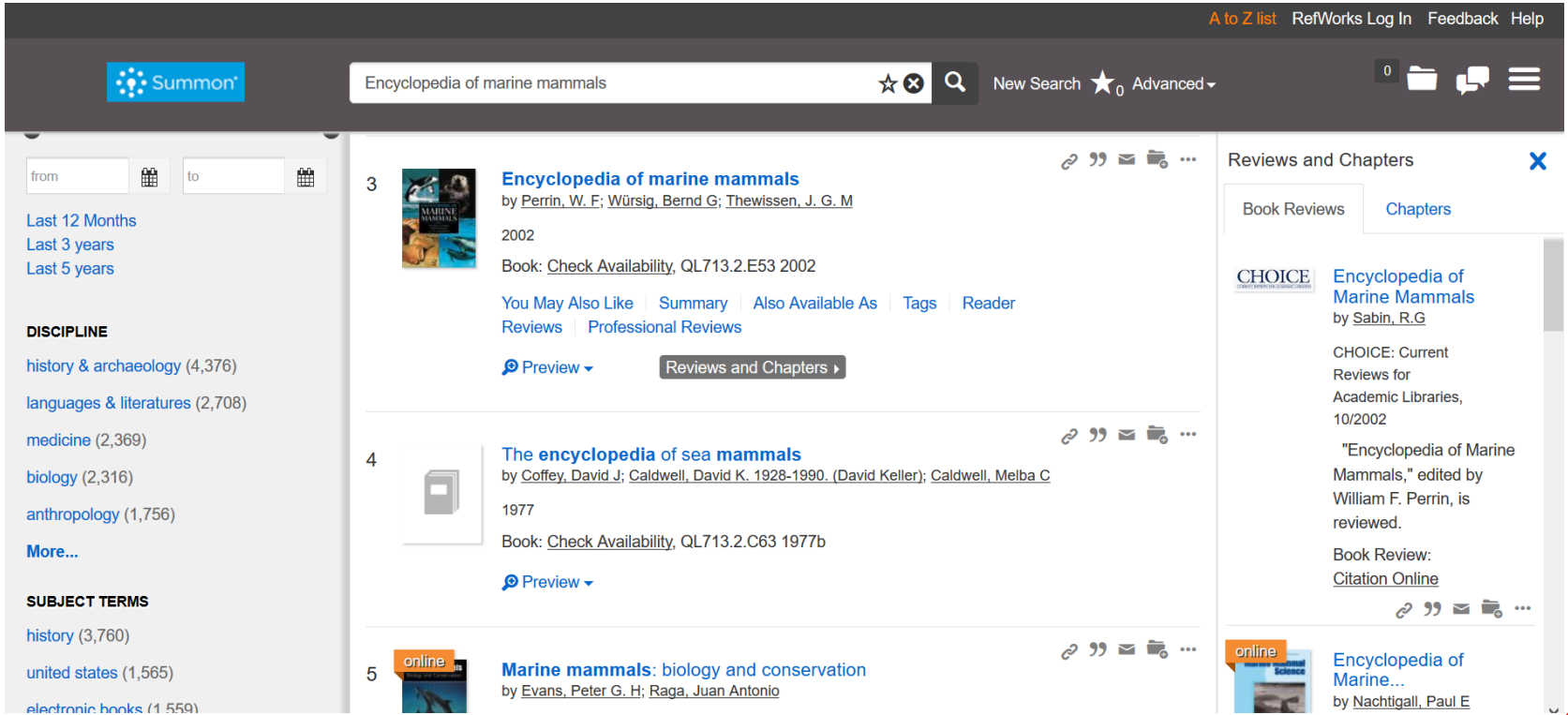


- Add visual indicator to help patrons better find the results they need as they scan the results

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Related Items

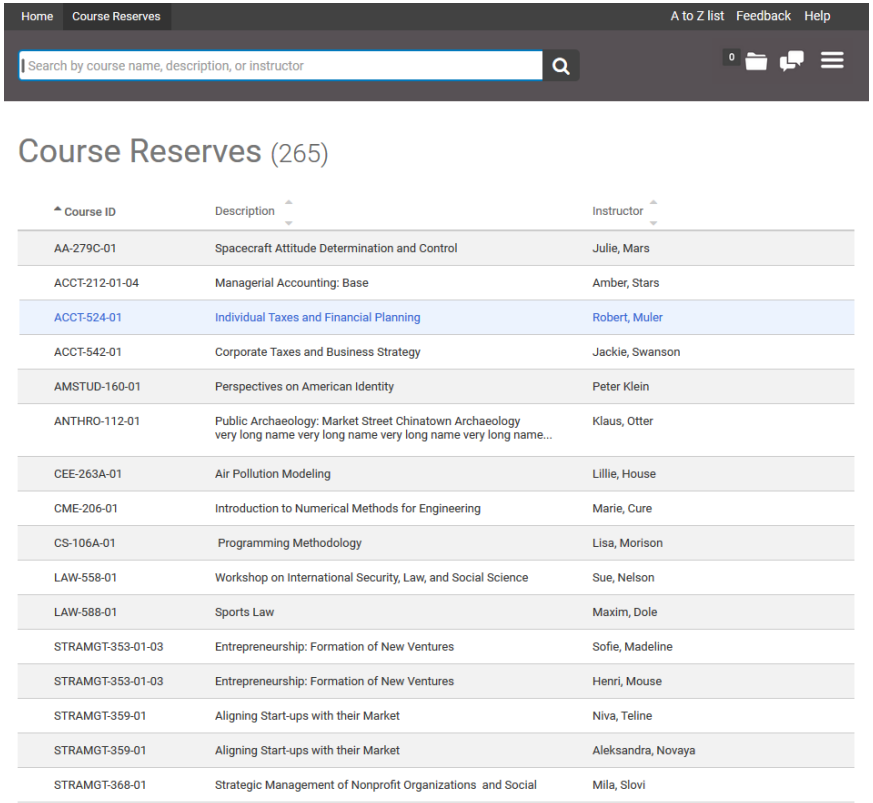
SEARCH AND EXPLORING



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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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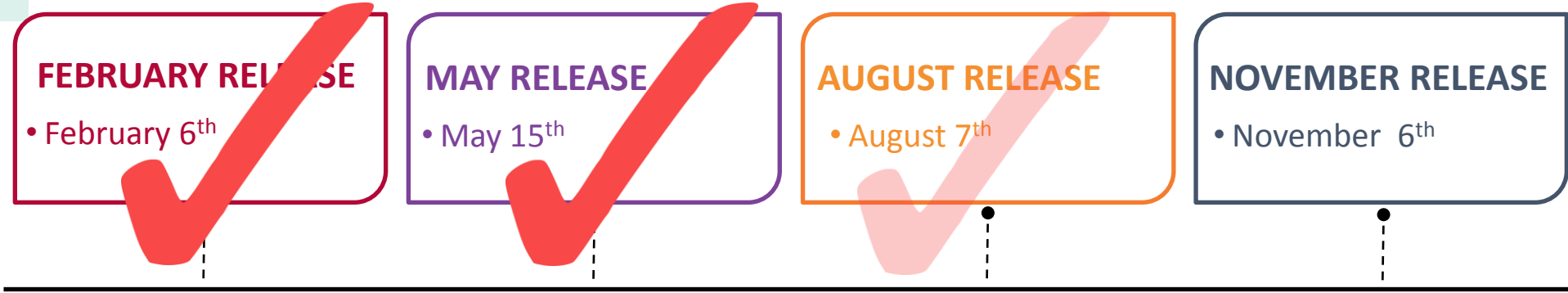


Summon Roadmap H2 2019

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Improved Facets

USER EXPERIENCE

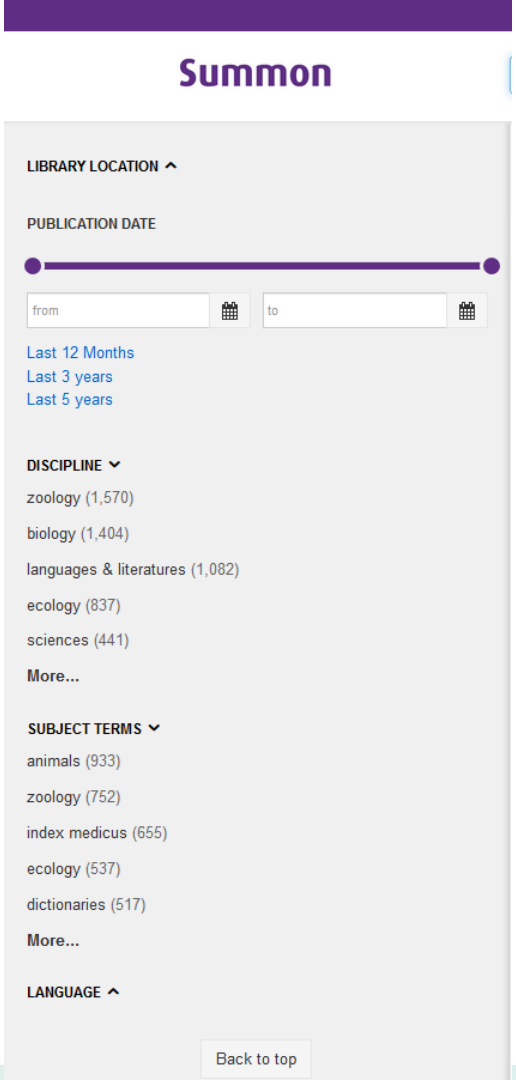
NERS

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



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Public Notes

USER EXPERIENCE

NERS



Customer Value

- Exposure of information related to resources your institution subscribes to



Feature Highlights

- Display of Database Notes, Database All Title Notes, Title Level Notes and Title Location Notes

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Integration with Leganto Course Reading List Solution

OPEN SYSTEM



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

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Open Access Reporting

OPEN SYSTEM



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

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IEDL Reporting

LIBRARY EMPOWERMENT

NERS



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

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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)

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Video Improvements

USER EXPERIENCE



Customer Value

- Better treatment of video content in Summon results



Feature Highlights

- Improved treatment of video metadata
- Exposure of data and facets related to metadata
- Display of thumbnails

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Topics: Recall and Precision

SEARCH AND EXPLORING



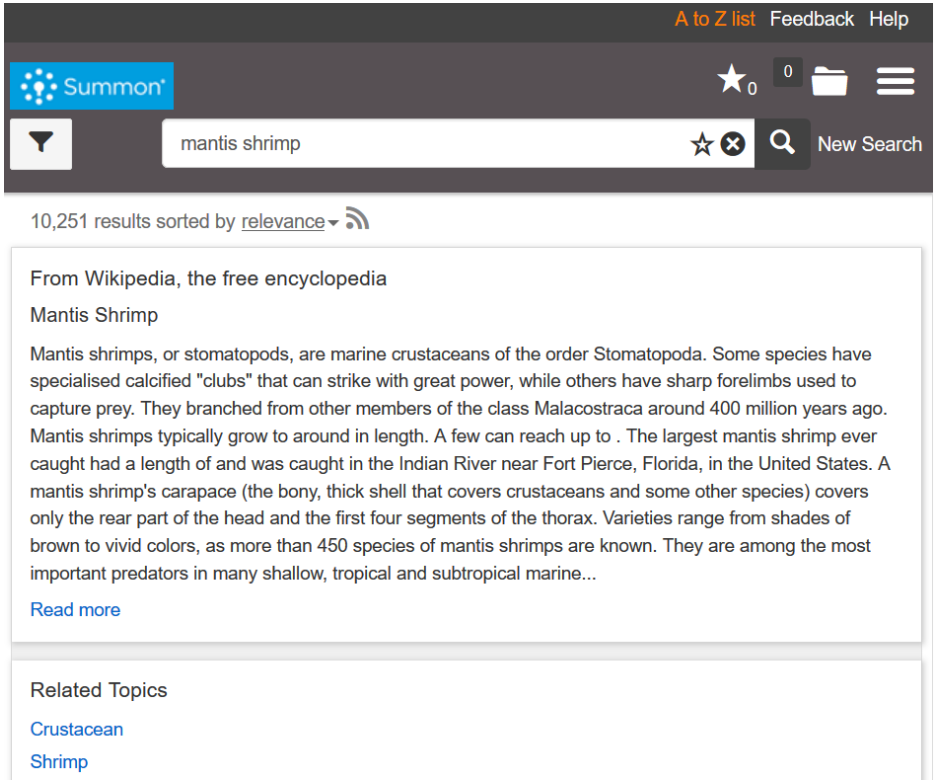
Customer Value

- 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



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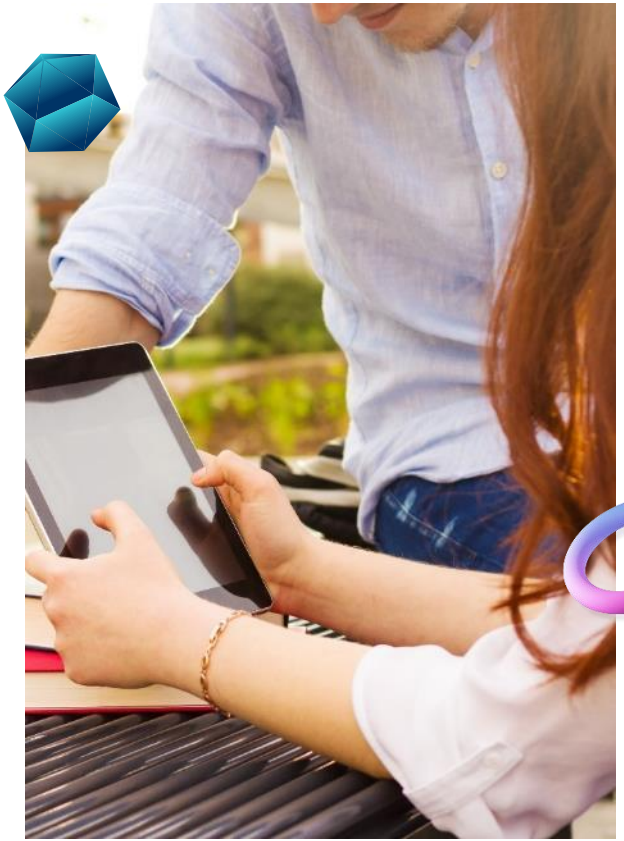
360 and Intota August 2019 Release

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360 and Intota Services Overview

- Fixed long standing issue that prevented the Output Coverage Date(s) field from displaying custom coverage dates.
- Streamlined database configuration process to allow customizations as soon as you change the status, without first having to save and then re-edit the database.
- Resolved the issue causing some databases to show a blank status in the Tracked Resources report.
- Resolved the issue that failed to add the proxy prefix to URLs in the Tracked Resources report.
- “Video” is now a content type that can be added to Library Specific Holdings databases



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CDI: Central Discovery Index

Discovery trends and strategy

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A New Discovery Index



Central Discovery Index

Future-ready

- Unified index for Primo & Summon
- Includes a graph database to create relations

Operational effiency

- 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

- On track for upgrade in Q4
- Transition should be seamless
  - No change in User Interface
  - No changes to API
- Upgrade should be the equivalent of a monthly maintenance release

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Upcoming Webinars

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Upcoming Webinar

- **The Match & Merge Story: Improving Search Results, Reducing User Confusion**. You can register for any of these three September sessions:

  - NA/APAC: September 11 at 4:00 pm (San Francisco) and September 12 at 8:00 am (Tokyo); 9:00 am (Sydney)
  - NA/EMEA: September 12 at 9:00 am (Chicago); 10:00 am (New York); 3:00 pm (London); 4:00 pm (Paris)
  - NA: September 12 at 11:00 am (San Francisco); 1:00 pm (Chicago); 2:00 pm (New York)

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Presented by ELUNA/IGeLU

- **Customer-led webinars**
  - 30 minute show-and-tells
  - Three different libraries taking 10 minutes each what they have done based on a certain topic.
  - Dates will be determined based on the presenters' availability.
  - **Responses are due by August 21st.**

- **Topic 1: Analytics and Summon**
  - Beginning of October 2019 (exact date TBD)
- **Topic 2: Summon interface configuration**
  - Beginning of November 2019 (exact date TBD)
- **Topic 3: Summon integration and interoperability with other products**
  - February 2020 (exact date TBD)

Proposal Form URL: https://docs.google.com/forms/d/1Bm1YG5I_szELjUceJ4EkjZZBGH-TxhhUCPFgV41L1HM/viewform

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Presented by ELUNA/IGeLU

Virtual Development Day Topic: The Summon API

- In addition to the three webinars, we will also be organizing a virtual development day during which Summon customers can learn from Ex Libris developers and other Summon customers about best practices for using the Summon API.

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Thank you!

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