

Summon Update and Q&A

October 2019

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Director of Product Management, Summon

Ex Libris
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- Highlights of Summon Performance and Recent Improvements
- November Quarterly Release
- CDI Update
- 2020 Summon Roadmap Planning



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

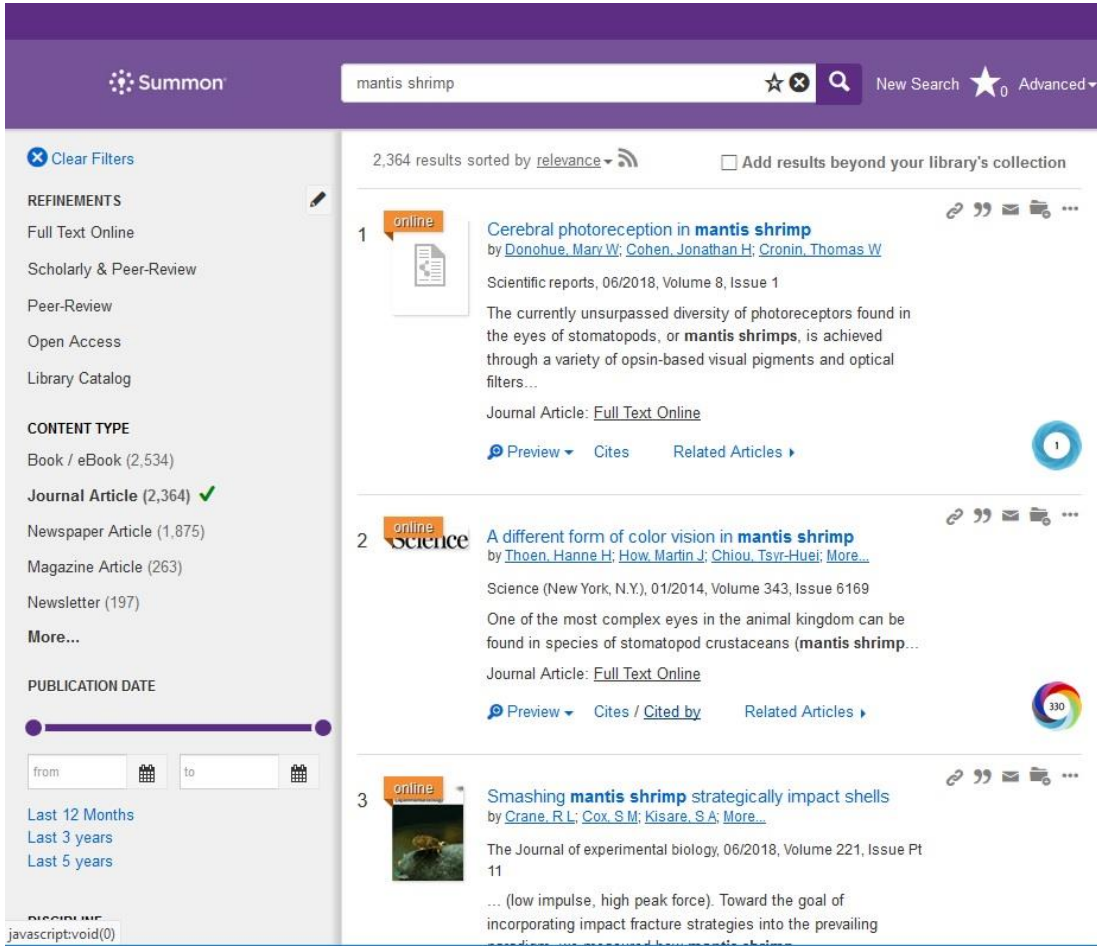
- Linked Data
- Improved handling of video content
- Topics: Recall/Precision Improvements
- IEDL Reporting in OBI (NERS)
- Unpaywall

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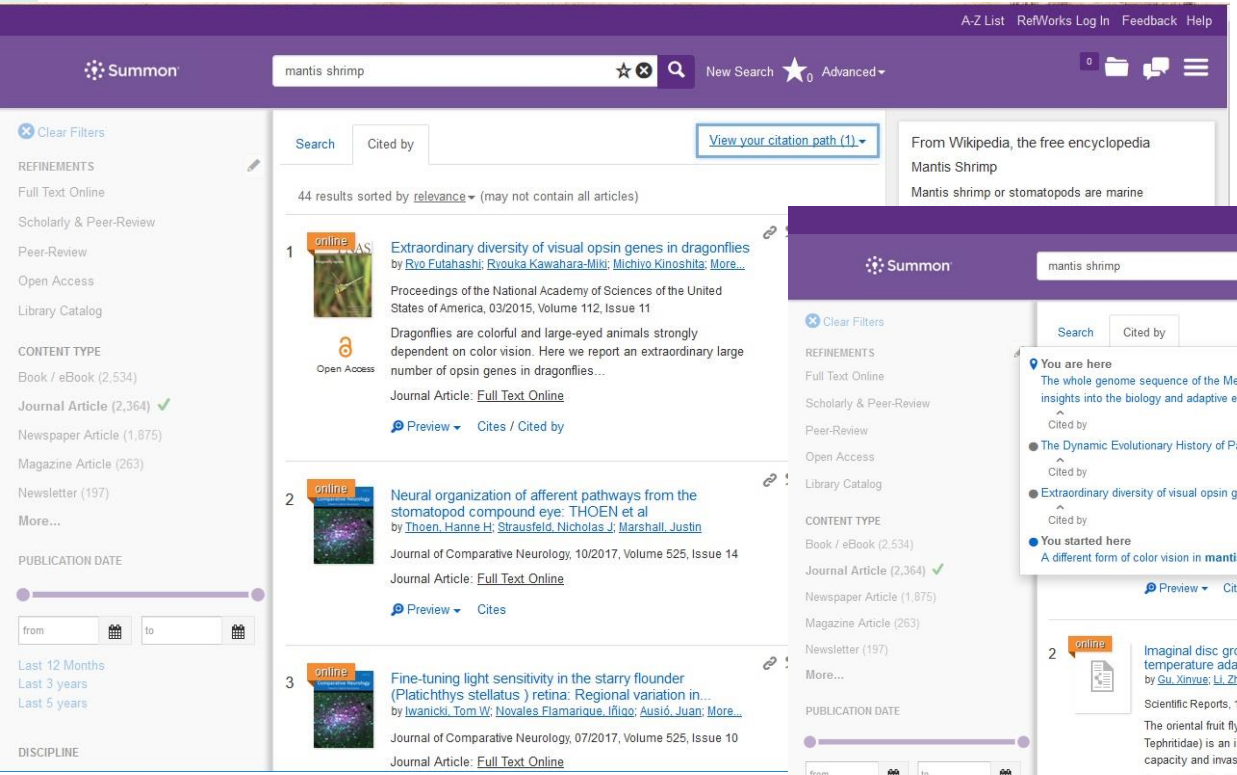
Citation Trail

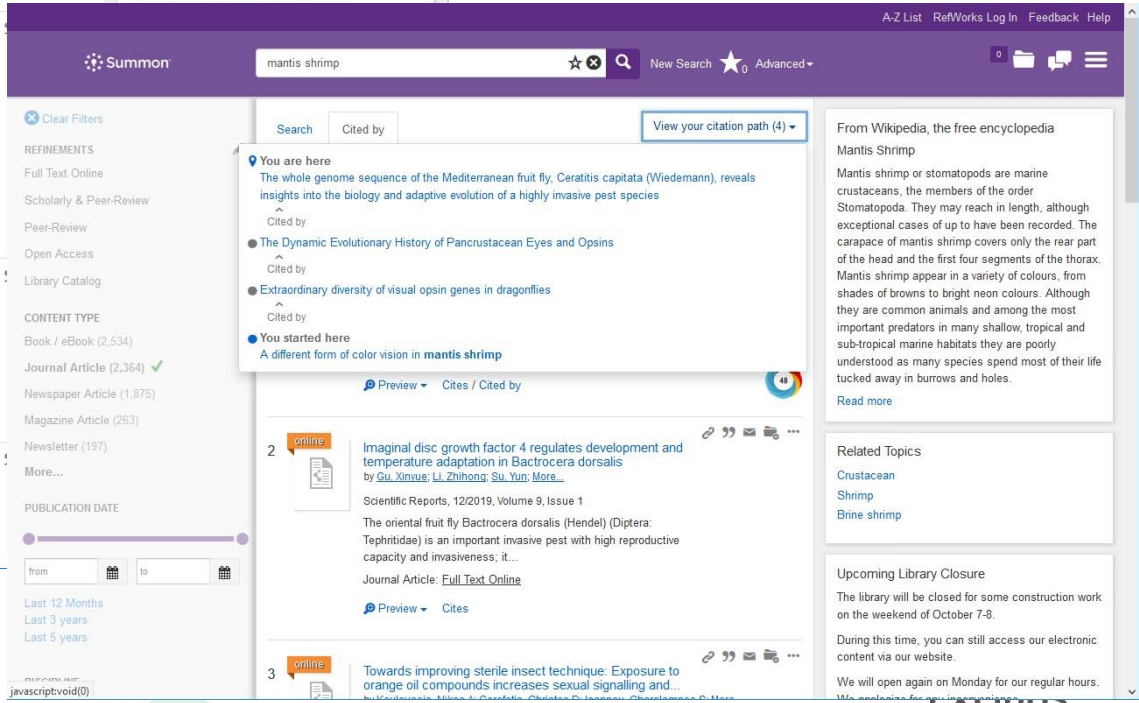
- Follow citations within a search result to access articles cited in current record to discover new content
- Explore and discover texts using citations within text as navigation
- Follow citations within a text or find texts that cite the article



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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



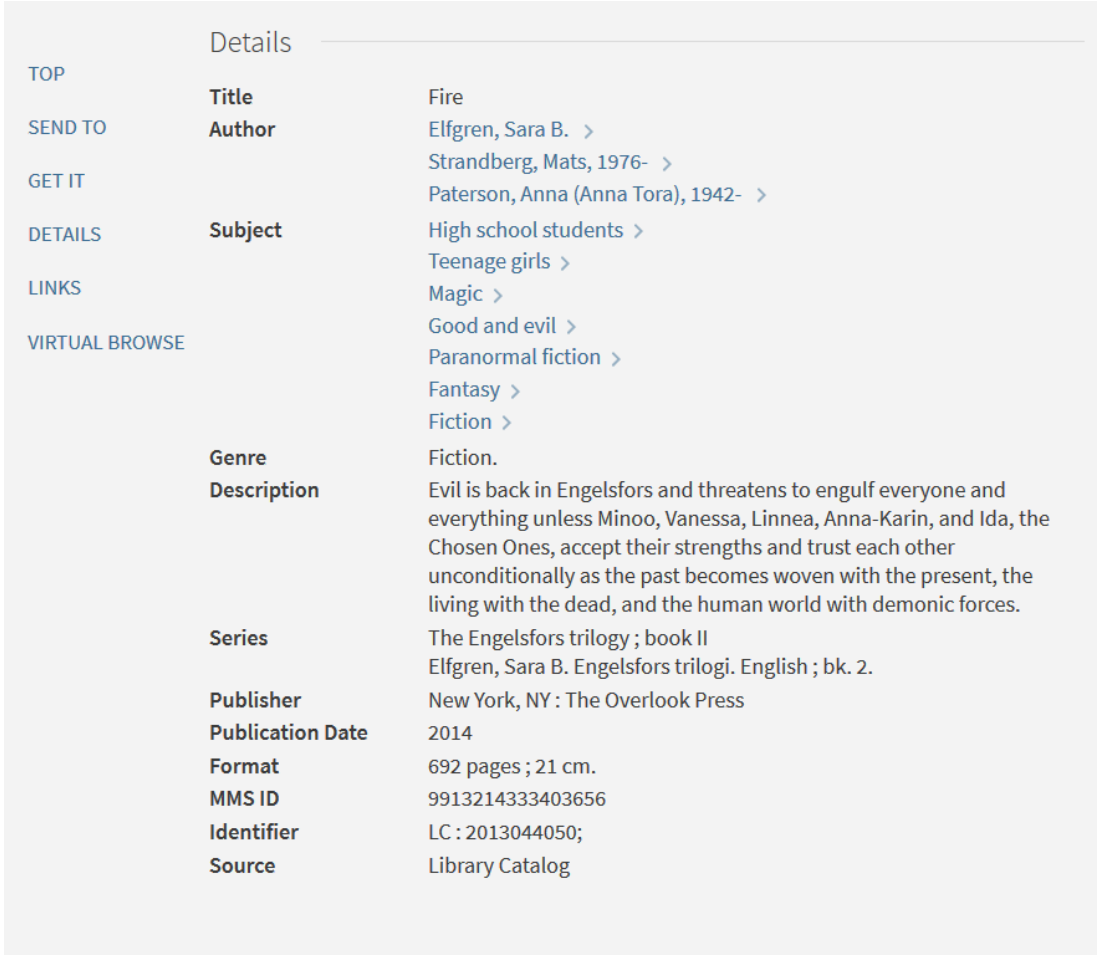
Feature Highlights

- 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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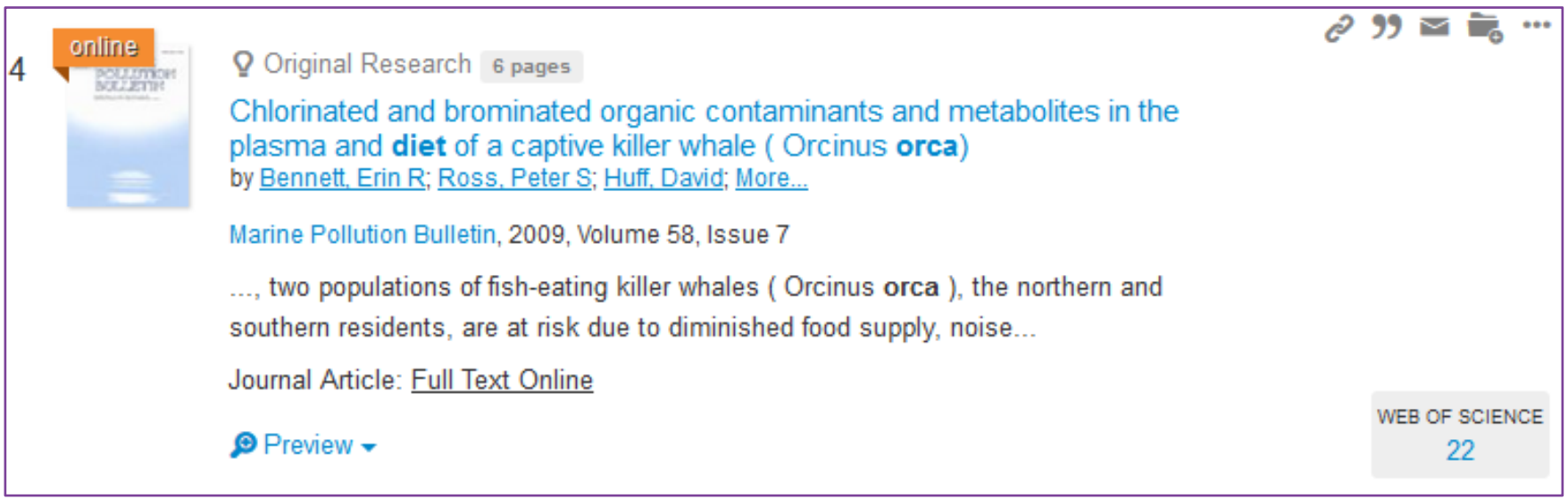
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Glanceability

USER EXPERIENCE

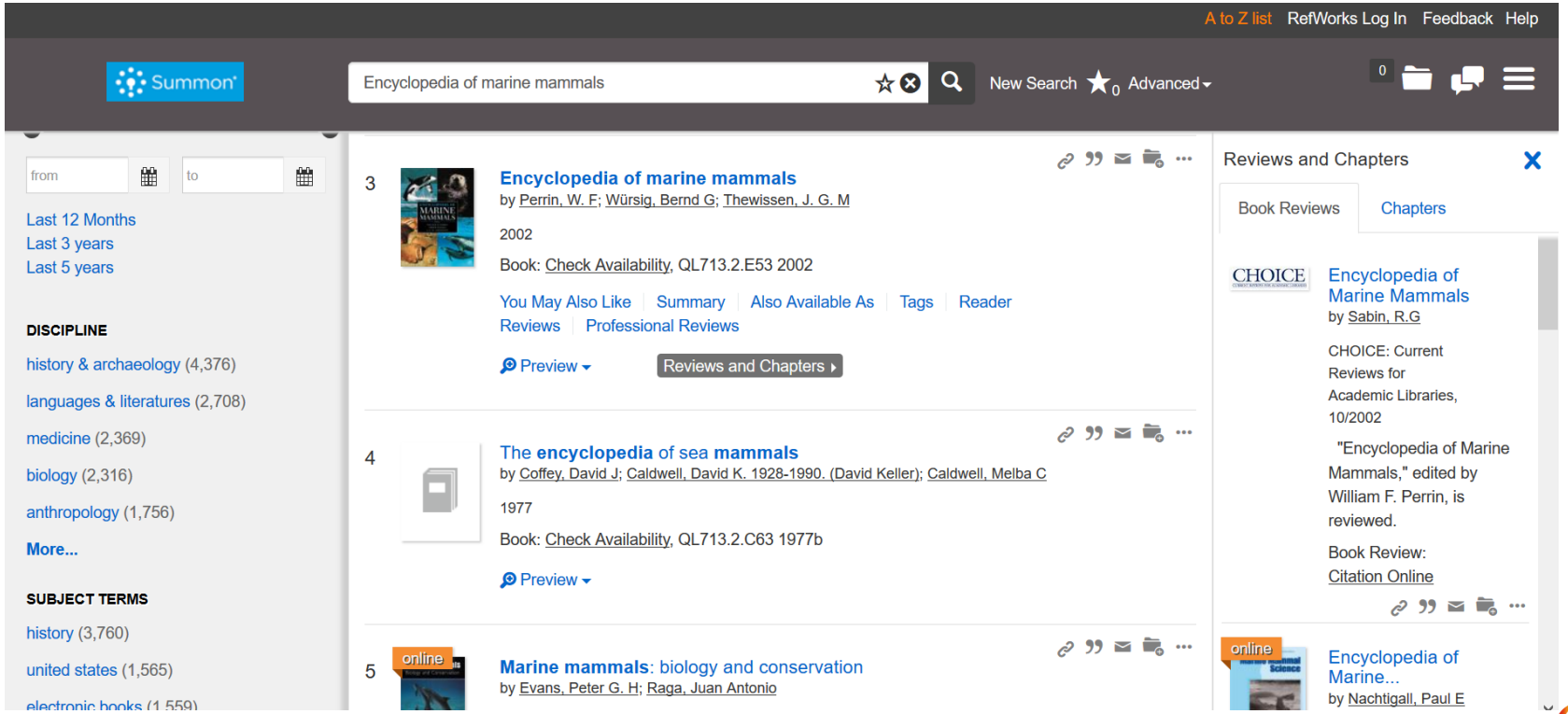


- Add visual indicator to help patrons better find the results they need as they scan the results

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Related Items

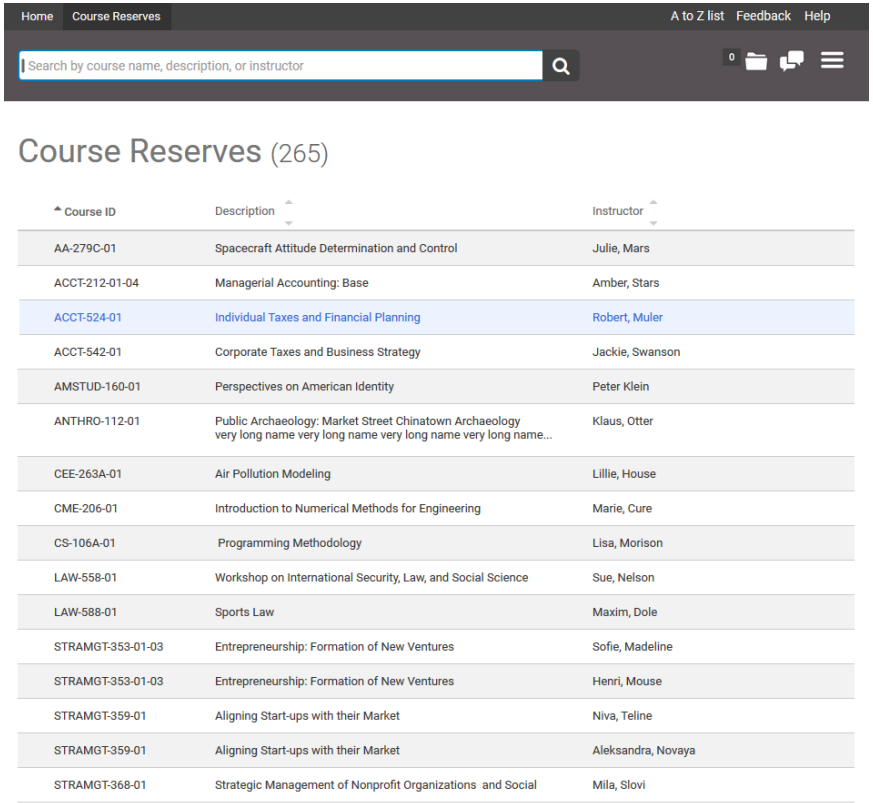
SEARCH AND EXPLORING



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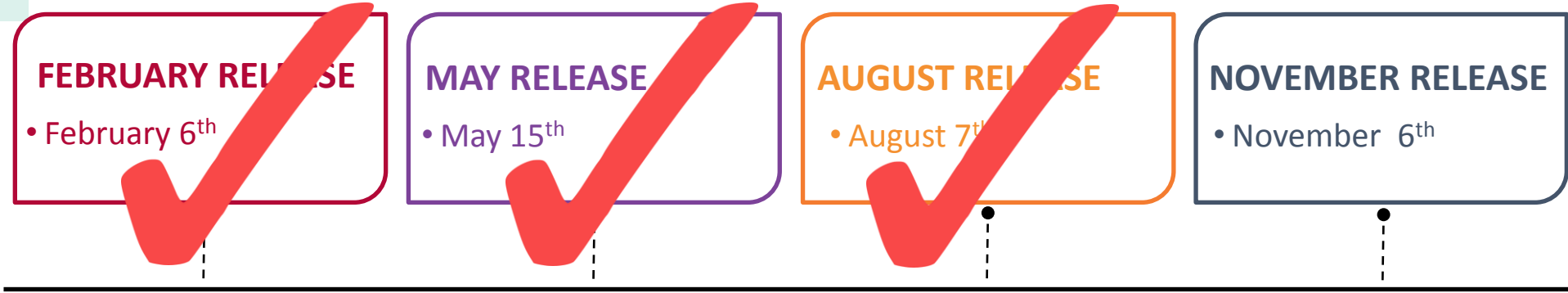
Summon over Alma Improvements in June

- 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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Improved Facets

USER EXPERIENCE

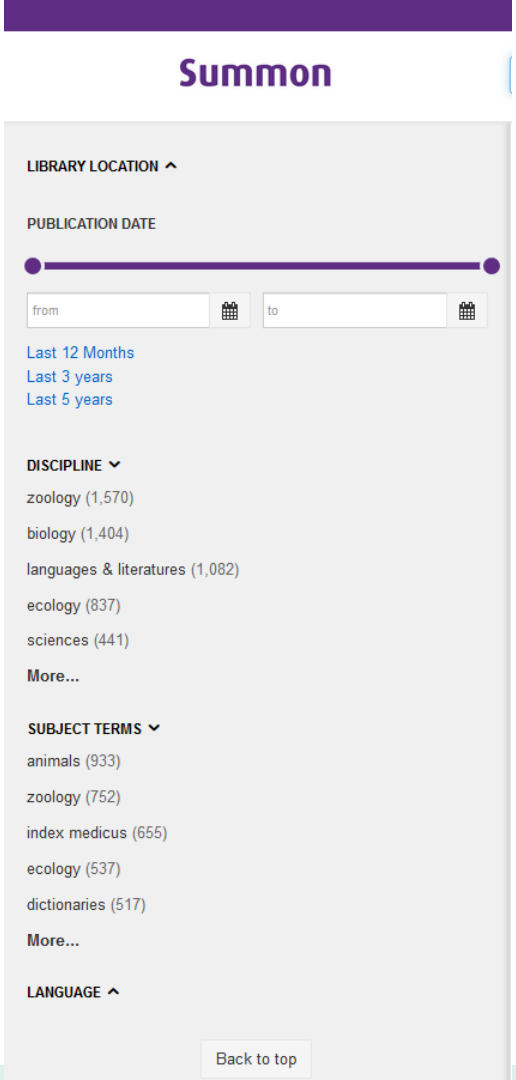
NERS

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

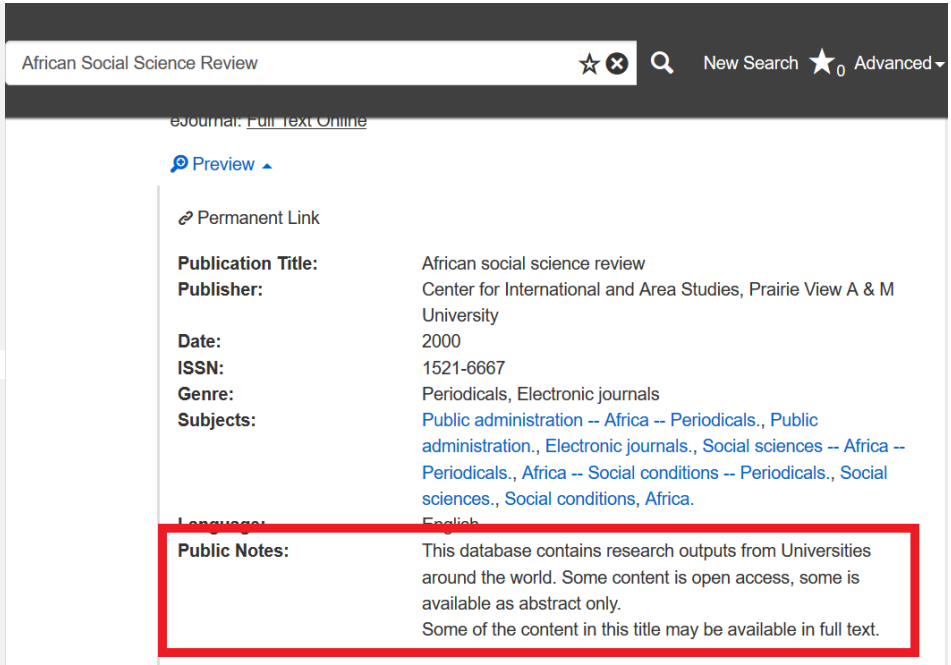
NERS

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

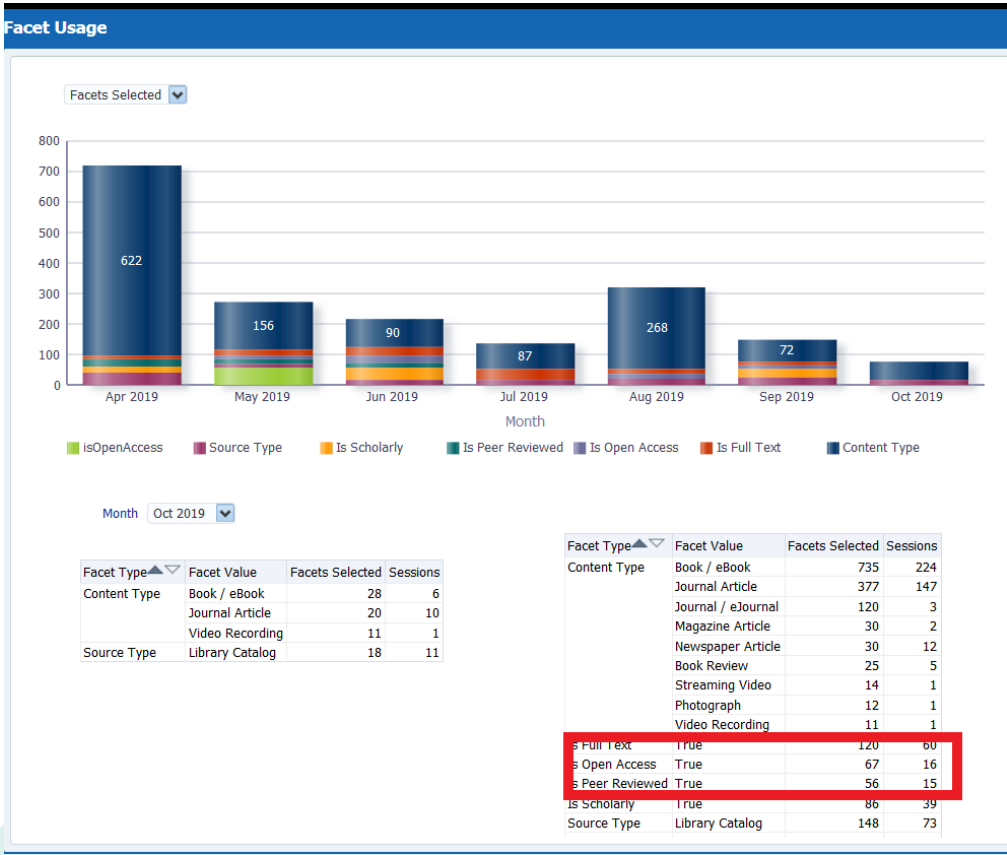
OPEN SYSTEM

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



Facet Type	Facet Value	Facets Selected	Sessions
Content Type	Book / eBook	28	6
	Journal Article	20	10
	Video Recording	11	1
Source Type	Library Catalog	18	11

Facet Type	Facet Value	Facets Selected	Sessions
Content Type	Book / eBook	735	224
	Journal Article	377	147
	Journal / eJournal	120	3
	Magazine Article	30	2
	Newspaper Article	30	12
	Book Review	25	5
	Streaming Video	14	1
	Photograph	12	1
	Video Recording	11	1
s Full Text	True	120	60
s Open Access	True	67	16
s Peer Reviewed	True	56	15
Is Scholarly	True	86	39
Source Type	Library Catalog	148	73

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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
- The report, “Title Clicks,” can be found in the Summon Community folder

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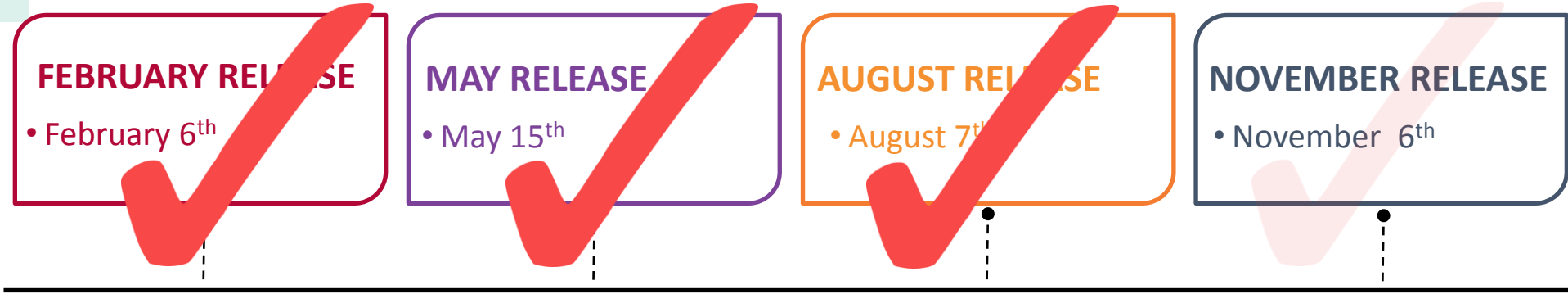


Summon November Quarterly Release

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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

- 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

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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

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Topics: Recall and Precision

SEARCH AND EXPLORING



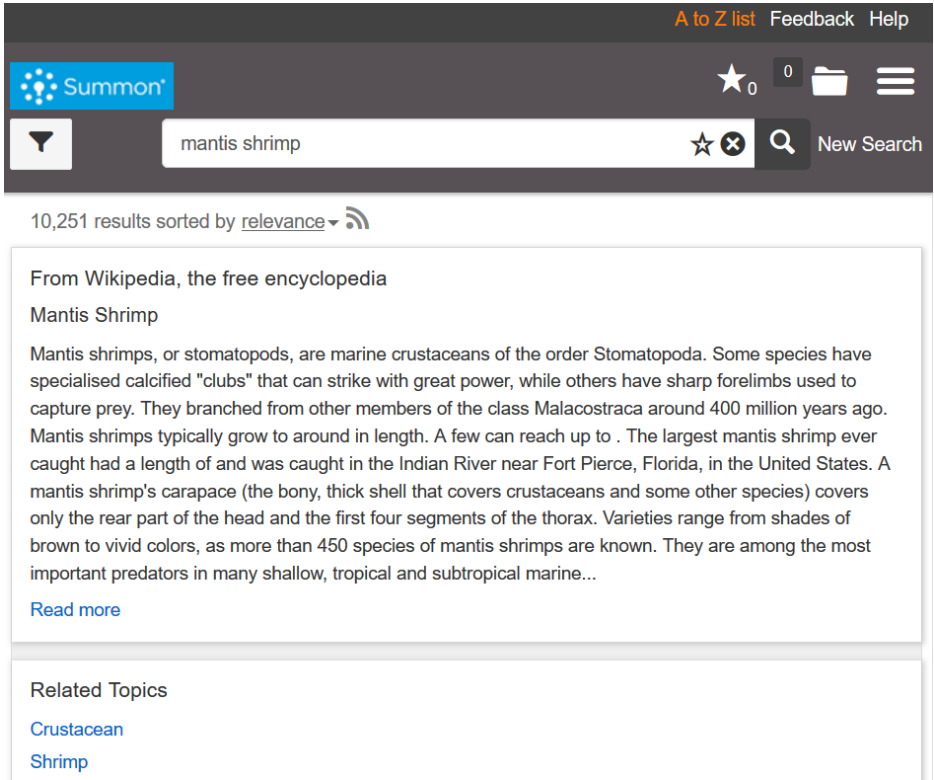
Customer Value

- Ensure recommendations from Topic Explorer are relevant to the user's needs



Feature Highlights

- Improvement for updates for Wikipedia



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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

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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

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Addition to Release—Advanced Search options

SEARCH AND EXPLORING



Customer Value

- More alternatives for search precision on the Advanced Search page



Feature Highlights

- Ability to search by Match All, Match Exact, or Match Any

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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 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

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Roadmap Planning for 2020

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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

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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

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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

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OBI Improvements

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

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Upcoming Events

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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

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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: Inventorying 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)

Ex Libris: https://page.exlibrisgroup.com/charleston-november-2019-conference
*ProQuest: https://go.proquest.com/Charleston2019

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