
ExLibris
Part of Clarivate
Summon Research Assistant
Discovery Product Team

- Overview
- Demo
- In More Detail
- Things to Know

Ex Libris
Part of Clarivate

Summon Research Assistant



Traditional Search

Fast and efficient way to find resources



Discovery Enhanced with AI

A knowledgeable assistant that analyses information, provides relevant answers, based on trusted content.



Guidelines

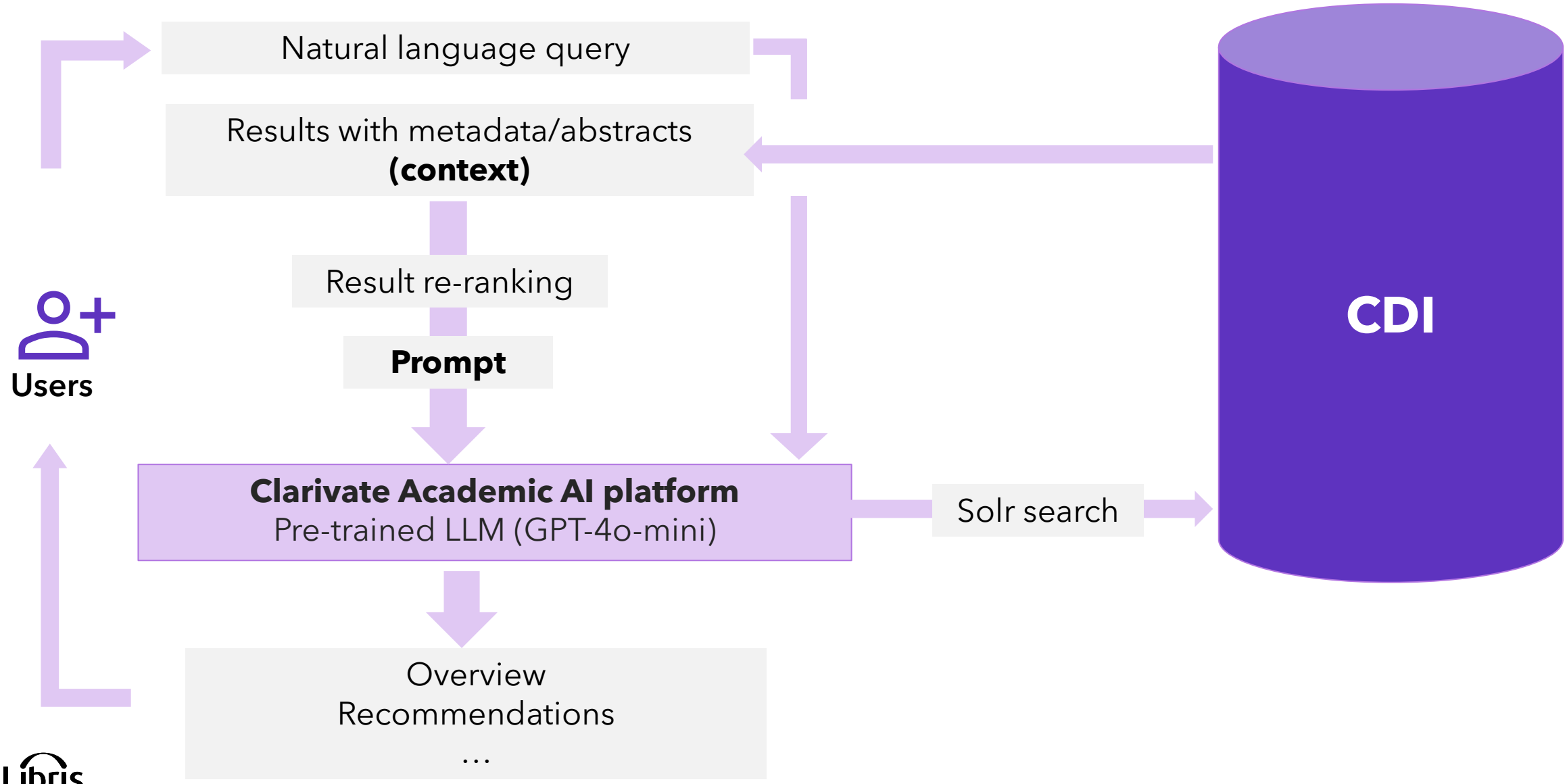
- Retain academic integrity by taking advantage of trusted library materials
- Engage users with intuitive, natural language searching
- Show context with a real-time generated overview
- Prove transparency with links to the resources used for the overview
- Provide a quick path to related questions

ExLibris
Part of Clarivate



Demo

Architecture & Flow



ExLibris
Part of Clarivate

Some of the Underlying Technology

- Large Learning Model (LLM) is OpenAI's GPT-4o mini

- Microsoft Azure AI services for application development
  - Azure OpenAI Service content filtering - Azure OpenAI | Microsoft Learn

In More Detail

Step 1: User query to search conversion

User search

what is the effect of vitamin D deficiency

LLM creates Solr query

(vitamin D deficiency effects) OR (impact of low vitamin D levels) OR (vitamin D insufficiency consequences) OR (health implications of vitamin D deficiency) OR (vitamin D inadequacy outcomes) OR (significance of vitamin D insufficiency) OR (consequences of vitamin D deficiency) OR (effects of low vitamin D levels on health) OR (vitamin D deficiency health risks) OR (importance of vitamin D levels for health) OR (what is the effect vitamin D efficiency)

In More Detail

Step 1: User query to search conversion

Step 2: Search execution in CDI

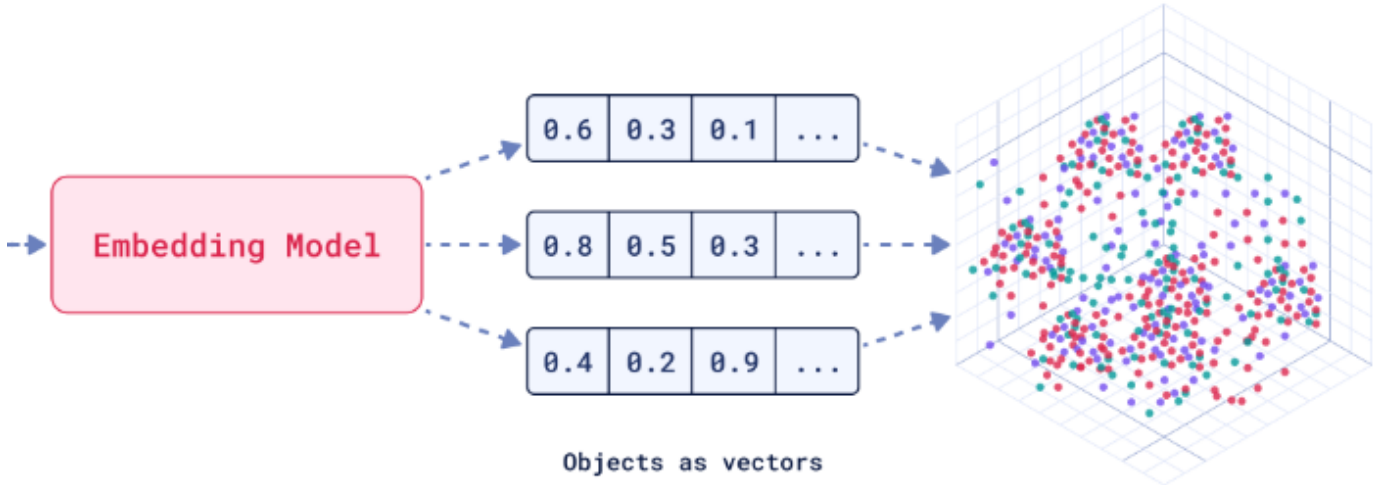
In More Detail

Step 1: User query to search conversion

Step 2: Search execution in CDI

Step 3: Re-ranking of top 30 search results to identify the 5 best fitting the user query

- *User query is converted into numeric representations*
- *Title/Abstract of the top 30 results are converted into numeric representations*
- *Both are mapped and the top 5 identified*



In More Detail

Step 1: User query to search conversion

Step 2: Search execution in CDI

Step 3: Re-ranking of top 30 search results to identify the 5 best fitting the user query

Step 4: Original user query, top 5 results, instructions (Prompt) are sent to the LLM

In More Detail

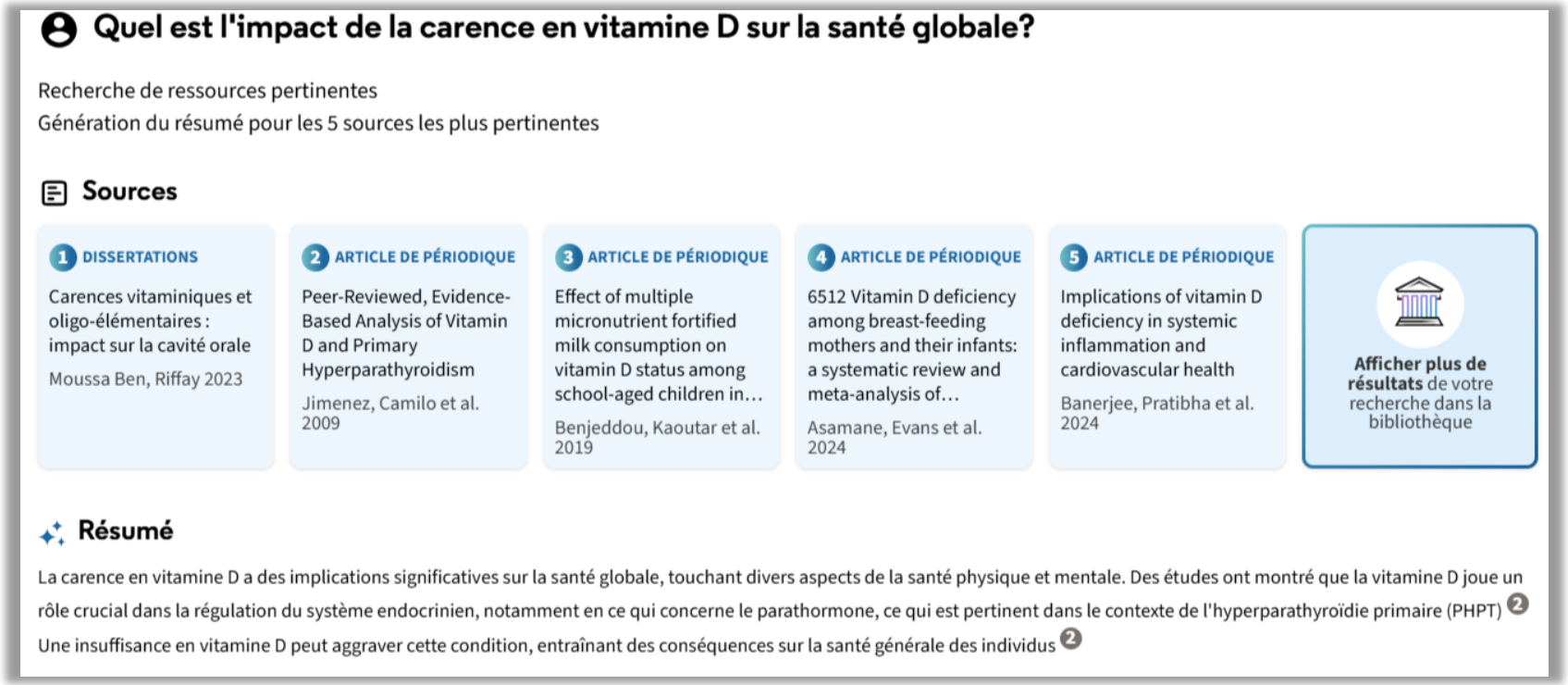
Step 1: User query to search conversion

Step 2: Search execution in CDI

Step 3: Re-ranking of top 30 search results to identify the 5 best fitting the user query

Step 4: Original user query, top 5 results, instructions (Prompt) are sent to the LLM

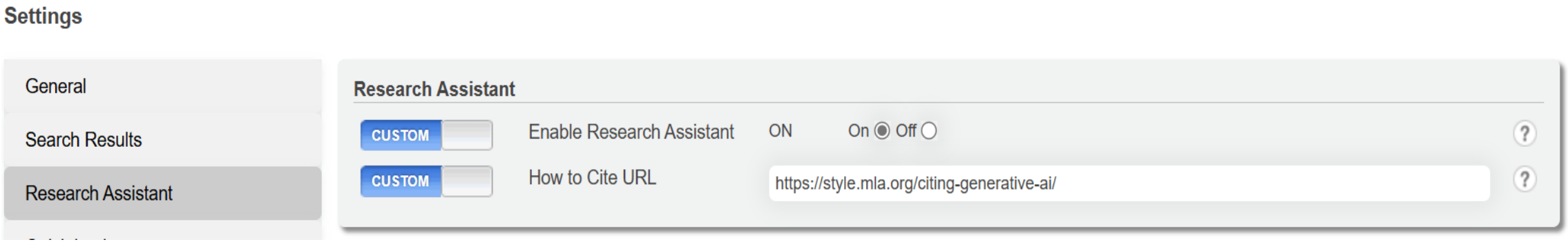
Step 5: LLM generates output according to instructions, based on the context



What is the Content Scope of the Research Assistant?

- We use the entirety of CDI metadata & abstracts for the Research Assistant with these exceptions:
  - No news content
  - No subscription databases (collections that are not free for search)
  - Individual sources with abstracts and other metadata too poor to include them
  - Documents marked as withdrawn or retracted (and retraction notes)
- Content providers have an opt out option: To date only a small number of publishers have opted out of participating (APA, DataCite, Elsevier, JSTOR, Conde Nast, Taylor & Francis). Conversations are ongoing.

How to Enable Research Assistant



Who Can Access Research Assistant?

- Your Summon subscription includes access to this tool, at no charge and with no changes to your contract or terms of use
- Authenticated individuals
  - Google
  - Microsoft
  - SAML
  - These options are configured in Settings > Advanced Search
- "Guest" users that are authenticated via IP as on-campus users

Summon Research Assistant: Things to Know

- To prevent abuse and monitor costs, searches are capped but can be adjusted as we learn more (April 2025 numbers)
  - 10,000 searches per day, per institution
  - 100 searches per day, per logged-in user
  - 40 searches per day, per “guest” user
- Research Assistant is not available in the API currently
- Monthly development is occurring
- User information is not shared with the LLM
- Our content is not used for training the LLM



© 2023 Clarivate

Clarivate and its logo, as well as all other trademarks used herein are trademarks of their respective owners and used under license.