Esploro Roadmap Highlights
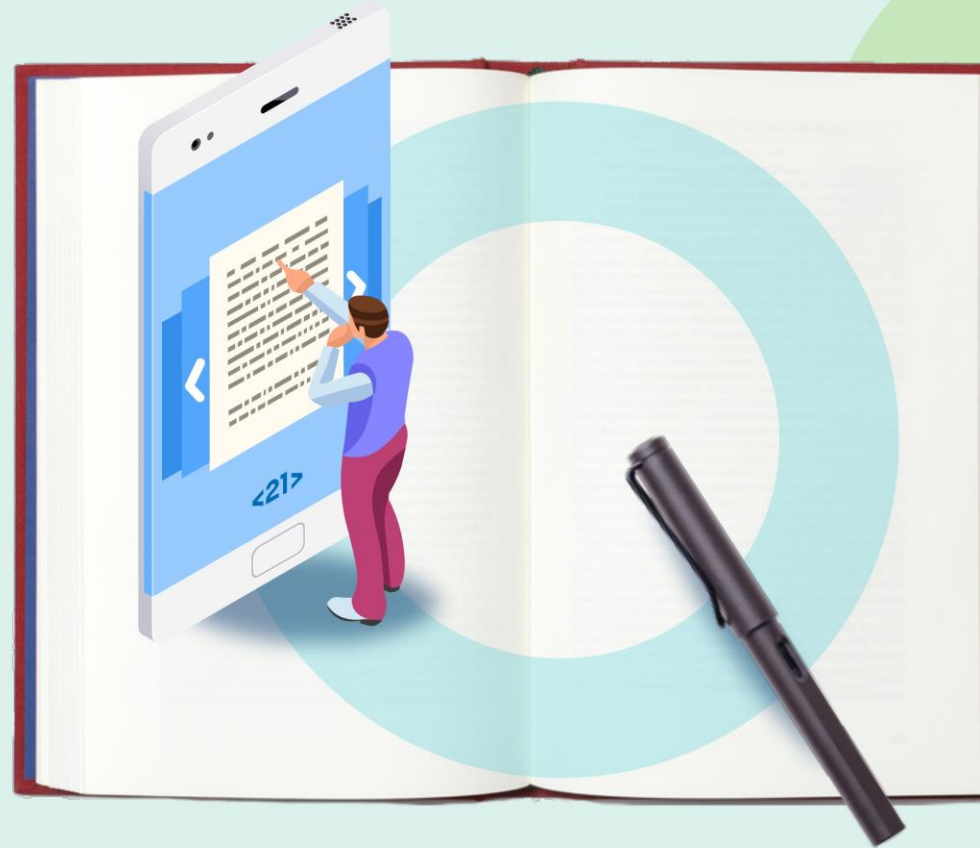
2023

Roadmap Highlights by Focus Area

	Showcase & Engage	Metrics & Analytics	Build up the Research Info Hub	Smart Harvesting improvements	Author matching enhancements	Improve Workflows	Open System
H1	Personalized CV templates	Share reports & dashboards with executives	Pull research outputs from ORCID			Easily manage previously affiliated researchers	Enhance existing APIs
	Showcase academic units with dedicated homepages	Richer metrics based on your InCites data				View and update org. structure in UI that reflects hierarchy	APIs to view, add and update Esploro's organization structure
H2	Display researcher-level metrics in the profile	More granular data in InCites MyOrg based on Esploro data	Create assets from Alma bibliographic records			Improve research information hub management workflows	API access to activities, projects & grants
	Showcase & measure alignment with UN sustainable development goals (SDGs)	External collaboration reports				Create custom asset categories & types	
		Expert Finder dashboard					

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SHOWCASE & ENGAGE

Use a dedicated state-of-the-art Research Portal for showcasing your institution's experts and their research outputs. Researchers can control and manage their own rich and up-to-date profiles.

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CV Management – Personalized Templates

SHOWCASE & ENGAGE

What's Coming:

Researchers will be able to generate a CV output from up-to-date information in their profile.

- Export most data from the researcher profile.
- Save personal templates tailored to various needs.

Release planned: H1 2023

Impact:

Easy and quick creation of up-to-date CVs in multiple formats.

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Dedicated Academic Unit Homepages

SHOWCASE & ENGAGE

What's Coming:

Visitors to the portal will be able to browse through dedicated academic unit pages and easily view information affiliated with each unit.

- Dedicated page created for each academic unit as part of the organization tree structure.
- These pages will display research assets and researcher profiles affiliated with each unit.

Release planned: H1 2023

Impact:

Easily browse and search for assets and researchers affiliated with an academic unit.

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Display Researcher Metrics on the Profile

SHOWCASE & ENGAGE

What's Coming:

Researchers can analyze the public views of their profile and research outputs.

- Information regarding views of the profile and outputs.
- Display graphic information regarding the researcher's research outputs and related activities.

Release planned: **H2 2023**

Impact:

Researchers and institutions can easily analyze views of their profiles and research outputs.

Support of UN Sustainable Development Goals

SHOWCASE & ENGAGE

What's Coming:

Increase your institution's impact analysis by embracing the UN Sustainable Development Goals.

- Add the goals to research outputs.

- Report and display of the UN Sustainable Development Goals in the portal.

Release planned: **H2 2023**

Impact:

Showcase and compare the impact of your research on the world.

METRICS & ANALYTICS

Providing research office staff, repository managers, and faculty management with valuable insights into institutional research outputs, research activities, and researchers.

Share Reports and Dashboards with Executives

METRICS & ANALYTICS

What's Coming:

Repository managers will be able to share live reports and dashboards with various stakeholders across the institution.

- Share a link to allow access to live reports and dashboards.

Release planned: H1 2023

Impact:

Equip institutional stakeholders with quality data to support initiatives and decision-making.

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Enrich Institutional Analytics with Your InCites Data

METRICS & ANALYTICS

What's Coming:

InCites indicators will be included in several subject areas of Esploro analytics.

- Combine Esploro and InCites data in a single report / dashboard using a new dimension with InCites indicators included in several subject areas.

Release planned: **H1 2023**

Impact:

Enrich your reports and dashboards with multiple impact indicators from InCites.

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Integration with InCites – My Organization

METRICS & ANALYTICS

What's Coming:

Publish Esploro institutional data to InCites – My Organization.

- Publish information about the institution's organization, researchers and assets.
- Use My Organization within InCites to get a granular view of the institution.

Release planned: **H2 2023**

Impact:

My Organization offers a deeper understanding of how your institution is doing in terms of research.

External Collaborations Analysis

METRICS & ANALYTICS

What's Coming:

An out-of-the-box analysis of researchers' collaborations, including cross-institutional collaborations.

- The new analysis will be based on approved assets' metadata.
- It will show, among other things, cross-institutional collaboration networks.

Release planned: **H2 2023**

Impact:

Demonstrate the impact of your institution by showing its strong collaboration worldwide.

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Expert Finder Dashboard

METRICS & ANALYTICS

What's Coming:

An out-of-the-box dashboard that combines researcher data from across several different entities to facilitate analysis and benchmarking.
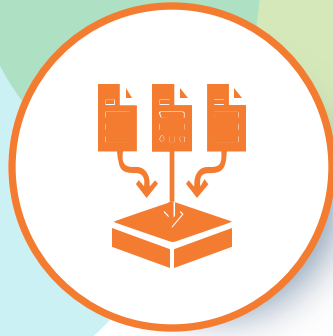
- The dashboard will include information about researchers' publications, grants, projects and activities.

Release planned: **H2 2023**

Impact:

Find the best researcher to match the task at hand.

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BUILD UP THE

RESEARCH INFORMATION HUB

The research information hub holds rich information on the institution's researchers and academic units. Use tools to build up the Research Information Hub efficiently, importing more data and with higher quality.

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Efficiency Boosters for Smart Harvesting Framework

BUILD UP THE RESEARCH INFORMATION HUB

What's Coming:

A set of features that will increase efficiency and ease-of-use of the Smart Harvesting Framework workflows.

- Bulk replace of author-researcher match

- Edit asset in generic form from task list

- "Has DOI" facet

- Simpler creation of new non-affiliated researcher

Release planned: **H1 & H2 2023**

Impact:

Faster approval of author matching, and of assets brought in via Smart Harvesting.

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Author Matching Algorithm Improvements

BUILD UP THE RESEARCH INFORMATION HUB

What's Coming:

Ongoing improvements to the Author Matching Algorithm.

- More granular topic embedding to improve topic matching

- Better handling of researchers with common names

- Improved use of affiliation and co-author

- Improved training data (derived from ORCID profiles)

Release planned: **H1 & H2 2023**

Impact:

Improved author matching which will reduce the burden on administrators and researchers.

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Pull Research Assets from ORCID

BUILD UP THE RESEARCH INFORMATION HUB

What's Coming:

Pull researcher output assets from ORCID into Esploro.

- Use another source to help populate Researcher Profiles

- Asset metadata will be taken from CDI (Central Database Index)

Release planned: **H1 2023**

Impact:

Easily populate profiles without having to manually enter data that is already available in ORCID.

Smart Expansion – Alma to Esploro

BUILD UP THE RESEARCH INFORMATION HUB

What's Coming:

A new type of Smart Expansion in which Alma records can be copied to Esploro Assets.

- Works on a set of Alma BIB (MARC) records

- Optionally update the Alma record to indicate it has been copied

- Optionally include Alma-D files

Release planned: H2 2023

Impact:

Re-use of relevant Alma BIB records as basis for Esploro records.

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IMPROVE WORKFLOWS

Use new and improved tools to manage the Research Information Hub and maintain your institution's data including researchers, research outputs, grants, projects, activities, and research resources.

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Easily Manage Previously Affiliated Researchers

IMPROVE WORKFLOWS

What's Coming:

Repository managers will be able to easily update affiliation status.

- Update affiliated researchers to non-affiliated and previously-affiliated.

- Update non-affiliated researchers to previously affiliated.

- Update researcher without changing the Alma user.

Release planned: **H1 2023**

Impact:

Increased control over non-affiliated and previously affiliated researchers in Esploro Research Information Hub.

Display and Manage Academic Units in New Tree UI

IMPROVE WORKFLOWS

What's Coming:

Repository managers will be able to easily update their institution's academic units on the new management page.

- View and manage all levels of academic units in a tree display.

- Select and update multiple units in the tree display.

Release planned: **H1 2023**

Impact:

Enabling repository managers to keep the organizational structure up-to-date in Esploro.

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Improve Research Hub Management Workflows

IMPROVE WORKFLOWS

What's Coming:

Improved workflows for review, update and approval of researcher output.

- Display relevant metadata up-front.

- Provide easy navigation between related entities.

Release planned: H2 2023

Impact:

Greater accuracy and efficiency with improved workflows, displays and navigation.

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Local Management of Asset Types and Categories

IMPROVE WORKFLOWS

What's Coming:

Support local asset categories and types of assets for the institution.

- Administrators will be able to create local categories and types of assets to suit the unique needs of the institution.

Release planned: **H2 2023**

Impact:

The categories and asset types will suit the exact needs of the institution.

OPEN SYSTEM

Facilitate workflow automation & open and easy transfer of information with tools for integrating Esploro into the institution's ecosystem.

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Enhance Existing APIs

OPEN SYSTEM

What's Coming:

Add additional query options to existing APIs.

- Add new query options to the research asset API.

- Add new query options to the researcher API.

Release planned: H1 2023

Impact:

Retrieve all the records you need in a single API call.

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Create and Update Academic Units by API

OPEN SYSTEM

What's Coming:

Academic units API endpoint.

- Retrieve academic units by API

- Create new and update academic units by API

Release planned: H1 2023

Impact:

Integrate with campus systems to update your institution's organization structure in Esploro.

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Add New APIs for Esploro CRIS Entities

OPEN SYSTEM

What's Coming:

Add APIs for researcher activities, projects and grants

- Retrieve and display Esploro entities in other campus systems

Release planned: **H2 2023**

Impact:

Display Esploro data as needed in the campus eco-system.