

# Summon Roadmap Overview

2021



# Roadmap Areas and Highlights



SEARCH AND  
EXPLORING



OPEN SYSTEM



USER EXPERIENCE



LIBRARY  
EMPOWERMENT



CENTRAL  
DISCOVERY INDEX



ANALYTICS



ACCESSIBILITY



CONSORTIA

# Summon Roadmap Highlights

## February Release

February 3<sup>rd</sup>

Update APA citation style to 7th Edition

Continued work on Sierra via  
Summon—Early Adopter Access

## May Release

May 12<sup>th</sup>

Separate Print from Ebooks when Searching

NERS



Apply EZProxy to DOI in Preview Pane

NERS



Improvements on Topic Source Display

More convenience to access full text:  
Direct links to PDF (July Early Access)

# Summon Roadmap Highlights

## August Release

August 4<sup>th</sup>

Continued work on Sierra via  
Summon—Early Adopter Access

Short URL for Citations

NERS



Better Tag Matching for “Best Bets”

NERS



Central Discovery Index –  
Subject heading normalization

More convenience to access full text:  
Direct links to PDF (October General Availability)

## December Release

December 15<sup>th</sup>

Summon User Interface Refresh

Display All Links in Results

NERS



Improved Corrected Spelling (Did You Mean?)

NERS



Exact Search – Additional Fields

NERS



Improved Database Manager Management Tools

# Summon Roadmap Highlights

## Ongoing Work 2021

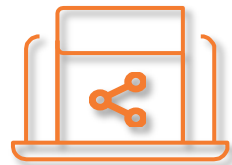
Relevance Improvements

Performance – Search Response Time and Load Management

Performance – Rights Processing

Accessibility Improvements and Compliance

Analytics and Reporting



# Central Discovery Index (CDI)

# CDI – Highlights and Focus Areas



Central Discovery Index

## Highlights:

- Improve normalization of Subject Headings
- Continued improvements for search responses from the API and for load balancing and management
- Improvements for rights updates in CDI



Impact

**Improved efficiency  
and accuracy**



# SEARCH AND EXPLORING



# Separate Print from Ebooks when Searching



NERs



## What's Coming:

Two additional facets—One for print and one for ebooks

## Highlights:

- Current facet combines print and ebooks; new facets will focus on each format alone
- Ability to include or exclude
- Configurable by institution

**Release planned:** May 2021



**Provides the user with the best controls for refining their search results**

# Better Tag Matching for “Best Bets”



NERs



## What's Coming:

Make Best Bets show up when tag keywords are present in search, not just when there's an exact match

## Highlights:

- Ability to match on tags when additional search terms are present
- Reduced need to create extensive tags to match potential user queries

**Release planned:** August 2021



**Provides the user with guidance from the librarian right when they need it**

# Exact Search—Additional Fields



NERs



## What's Coming:

Add the functionality to do an exact search on certain fields



## Highlights:

- Ability to select “exact match” on certain fields on the advanced search page
- Possible fields to include: Call number, ISBN, ISSN, Call Number, DOI, OCLC Number and Patent Number

**Faster, more targeted  
discovery of known  
items for end users**

**Release planned:** December 2021

# Relevance Improvements



## What's Coming:

Adjustments and improvements as an ongoing process

## Highlights:

- Iterative improvements for dynamic and static rank algorithms
- Based on feedback and system monitoring
- Implementation will be determined by success of relevance tests

**Release planned:** Throughout 2021



**Provides the user  
with the best results  
for their search**



# USER EXPERIENCE

# Improvements on Topic Source Display



## USER EXPERIENCE

### What's Coming:

Improvement for which source name is used for topic display

### Highlights:

- Alignment of source displayed for encyclopedia entry in Summon search results with the linked source

**Release planned:** May 2021



Impact

**Provide better user experience**

# Direct links to PDF



## USER EXPERIENCE

### What's Coming:

More convenience to access full text

### Highlights:

- Ability to prefer display of direct links to PDFs
- Configurable by institution
- Early access available to limited group in July; general access in October

**Release planned:** H1 2021



**Provide better user experience and access to content**

# Short URLs for Citations



USER EXPERIENCE

NERIS



## What's Coming:

Short URL to replace long, encrypted URL currently used in citations

## Highlights:

- Creation of a short URL management system for Summon
- Improvement for all citation styles

**Release planned:** August 2021



**Provide better user experience and citation management**



# Summon User Interface Refresh



## USER EXPERIENCE

### What's Coming:

Improvements to overall usability to existing Summon functionality

### Highlights:

- Improve placement and usability of features on the results page
- Focus on improving facets, results short display and preview, and accessibility
- Will not be a new UI but may require updates to training materials

**Release planned:** December 2021 with extended preview



Impact

**Ensure best user experience and easy access to all elements on the Search Results page**

# Improved Corrected Spelling (Did You Mean?)



USER EXPERIENCE

NERIS



## What's Coming:

Modification of Did You Mean? functionality to meet user expectations

## Highlights:

- Automatic replacement of misspelled word with corrected spelling
- Ability to search on original terms as a secondary search

**Release planned:** December 2021



**Meet user expectations for their search experience, returning expected results more quickly**



# LIBRARY EMPOWERMENT

# Update APA citation style to 7th Edition



LIBRARY EMPOWERMENT

## What's Coming:

Support for APA citation style (7<sup>th</sup> Edition)

## Highlights:

- Ability for users to save or export items in APA 7<sup>th</sup> Edition Format
- Accessible via the Saved Items folder or using the citation icon in the brief results

**Release planned:** February 2021



Impact

**Better alignment with current citation formats**

# Display All Links in Results



## What's Coming:

Enhance in Summon results page to display all full text links subscribed in the knowledgebase

## Highlights:

- Provide multiple sources for the end user to choose
- Configurable by institution

**Release planned:** December 2021



**Maximize the use of the library's resources and ensure users successful access to content**

# Improved Database Manager Management Tools



## LIBRARY EMPOWERMENT

### What's Coming:

Improve DB Recommender activation process, ranking and curation of sources

### Highlights:

- Batch processing for DB Recommender changes
- Librarian can assign priority to listed databases

**Release planned:** December 2021



Impact

**Better ability to  
manage and expose  
what is most relevant**



# ACCESSIBILITY

# Accessibility For Everyone



## ACCESSIBILITY

### What's Coming:

Ongoing web content accessibility compliance

### Highlights:

- Ongoing accessible-first feature developments
- Support Web Content Accessibility Guidelines (WCAG) 2.1

**Release planned:** Throughout 2021



Impact

**Ensure access for everyone**





# OPEN SYSTEM

# Sierra via Summon



## What's Coming:

Better integration of library systems and Summon



## Highlights:

- Allow for quicker, easier access to holding or checking out content
- Simplify administration by staff

**Stronger, unified  
discovery and  
management**

**Release planned:** Early Adopter Access H1; General availability H2

# Apply EZProxy to DOI in Preview Pane



NERS



## What's Coming:

The ability to add EZproxy to DOI field link



## Highlights:

- Ability to add EZproxy to DOI URL
- Configurable by institution

**Making content more easily accessible**

**Release planned: May 2021**

# Thank you!

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