



Summon – 2020 Roadmap

Notes on the Roadmap

- This roadmap is for informational purposes only
- We will continue to review the roadmap for 2020, taking into consideration any impacts remote access and support may have on proposed features
- Inclusion of functionality will be based on capacity and potential risk vs benefit and will take into consideration impact to remote support



- Summon 2020 Release Schedule
- Review 2020 Roadmap
 - February 2020 – Launch of CDI
 - May 2020 – UI Updates
 - August Review May release
 - Targets for upcoming releases
- Best Practices and Support Materials for Working Remotely



Summon 2020 Release Schedule

Introduction of CDI and New Features

Summon 2020 Release Schedule

FEBRUARY RELEASE

February 5th

MAY RELEASE

May 13th

AUGUST RELEASE

August 5th

NOVEMBER RELEASE

November 4th

February 2020

Introduction of CDI

- Improved performance and an upgrade to SOLR 7
- New facets
 - Author/creator
 - Collection (Database)
- Sort results by title or author
- Match & Merge improvements
- Search for authors or co-authors by ORCID IDs

May 2020

- Linked Data
- WhatsApp Integration

August 2020

- Add Section number to Course ID in Course Reserves page
- Consistent link back to search results
- Improve peer-review labeling
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- Accessibility improvements for WCAG compliance

November 2020

- Clarify author and editor in results and citations
- Databases A-Z List for Summon
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- Keep search refinements when moving to Advanced search
- Sierra Integration (Initial Phase)



February Release

Launch of CDI

Central Discovery Index (CDI) Launched in February

- Summon customers went live with CDI on February 5
- Includes:
 - Improved performance and an upgrade to SOLR 7
 - New facets
 - Author/creator
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 - The ability to sort results by title or author
 - Match & Merge improvements
 - The ability to search for authors or co-authors by ORCID IDs
 - New content providers and institutional repositories

New Facets

- Author/creator
- Collection (Database)
- The ability to sort results by title or author
- Recently added items facet

Settings

General
Search Results
Logos
Authentication
Facets
Reworks
Syndetics
Languages
Participant Record Prioritization
Citation Formats
Advanced Search
Refine Your Search
Custom Link
Topics
Resource Link Prioritization
A&I Detail Page
Transliteration (880 Fields)
Configuration (read only)
...

Facets

CUSTOM Contextual Faceting Enabled ON On Off

DEFAULT Refine Your Search Filters Enabled ON

DEFAULT Contextual Faceting for Union Catalog Enabled ON

CUSTOM Facets

Enabled	Disabled
<input type="text" value="ContentType"/>	<input type="text" value="Course Instructor"/>
<input type="text" value="Library"/>	<input type="text" value="Course Name and Number"/>
<input type="text" value="Publication Date"/>	<input type="text" value="Institution"/>
<input type="text" value="Discipline"/>	
<input type="text" value="SubjectTerms"/>	
<input type="text" value="Author"/>	
<input type="text" value="Language"/>	
<input type="text" value="Collection"/>	

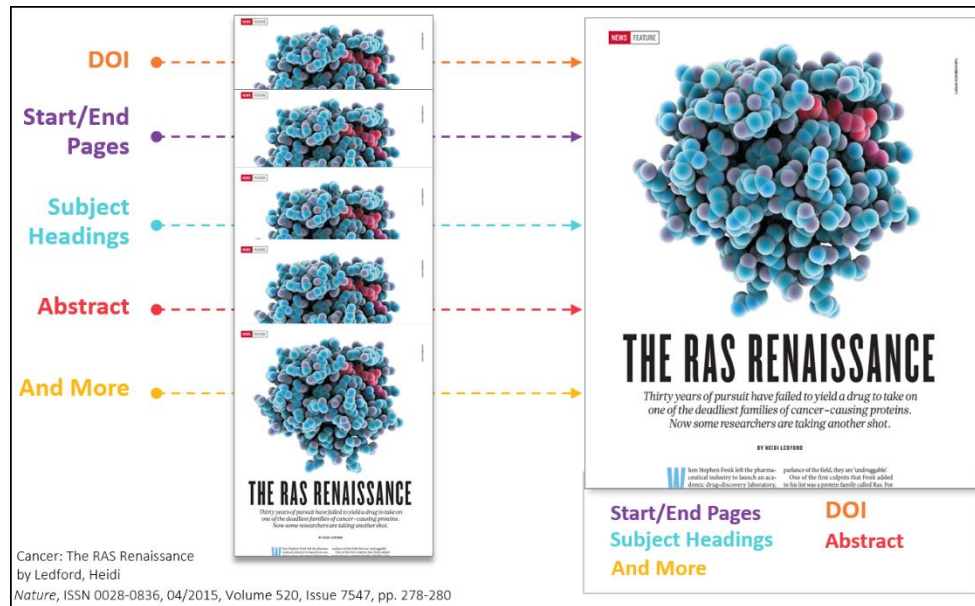
CUSTOM Facets Display

Expanded	Collapsed
<input type="text" value="ContentType"/>	<input type="text" value="Library"/>
<input type="text" value="Discipline"/>	<input type="text" value="Language"/>
<input type="text" value="Author"/>	<input type="text" value="Collection"/>
<input type="text" value="SubjectTerms"/>	

CUSTOM Library Location Whitelist

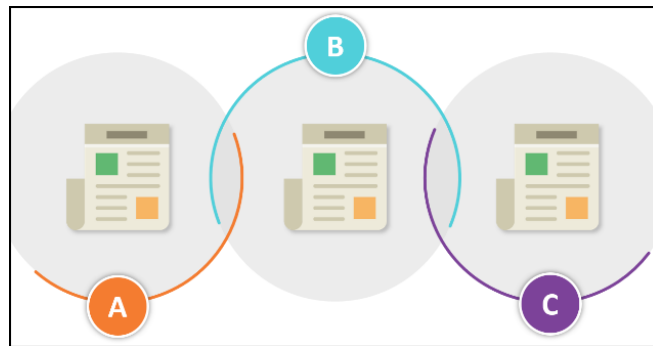
Match & Merge Improvements to Reduce Duplicates

- Added newsletters to merge process
 - Reduce the overall footprint of these content types
- Improving subtitle handling
 - Reduce number of merges prevented by variations in the subtitles
- Increased overmatch limit
 - Improves matching of records with exceptionally large numbers of duplicates



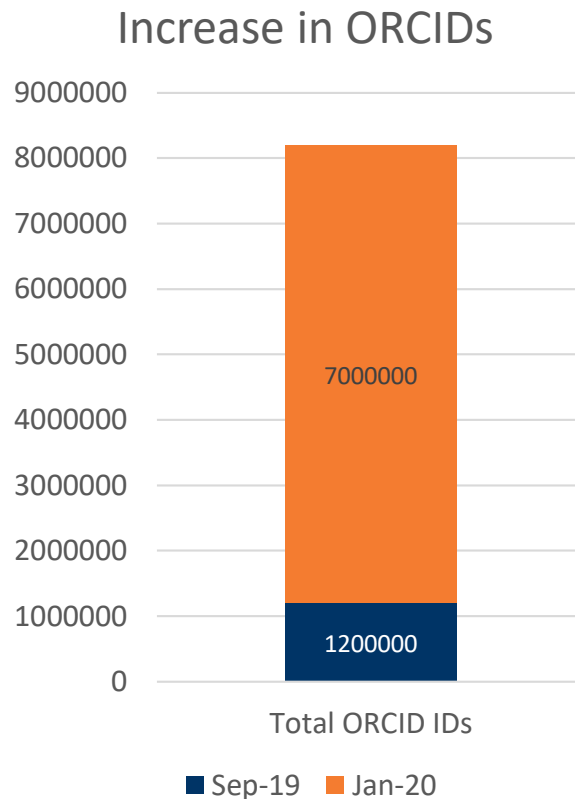
Match & Merge Improvements to Reduce Duplicates

- Relaxed language matching
 - Resolved discrepancy between Language Detected and sys_language
- Standardized quotation marks
 - Ensure different formats (" vs “ vs ”) don't prevent merging
- Better handling of synonyms
 - Color vs. Colour



Search by ORCID

- Enter an ORCID into Summon and search directly
(ORCID:XXXX-XXXX-XXXX-XXXX)
- Includes both authors and contributors
- Currently 8.2 million ORCID IDs in the index





May Release

Limited UI Changes

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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

- Expose additional metadata on the details page for SEO support

search engine indexing

- open Summon to web crawlers via sitemap
 - configurable what portion of data can be crawled
- drive traffic to Summon instances via Google, Bing etc
- provide crawler with meaningful and descriptive content via JSON-LD
- canonical URLs for Summon resources

Updated UI

- Detail page will also be landing page from search engine
- Needs to invite user to look around, discover more
- Provide detailed overview of the resource
- Engage user to take actions
 - Cite
 - Email
 - Save
 - Request
 - Share (twitter / Facebook / WhatsApp / Evernote / and more)
 - View in classic catalog

Updated UI

University of Cincinnati Libraries  Powered by Summon

marmots   New Search Advanced ▾

0  

< Back to results



Mr. and Mrs. Bunny-- detectives extraordinaire: by Mrs. Bunny

by [Horvath, Polly](#); [Blackall, Sophie](#) 2012, 1st ed


Book [temporarily unavailable](#), J HOR, CECH Children's & YA Books

 Cite

 Email

 Save

 Request

 View in classic catalog

 Share

Abstract

Middle-schooler Madeline's hippy parents have been kidnapped from Hornby Island, Canada, by foxes and Madeline, upon discovering that she can understand animal languages, hires two rabbit detectives to find them

LibraryThing

 ★★★★★ (3.80) | [16 Reviews](#) | [210 Copies](#)

Book Reviews

online

Mr. and Mrs. Bunny - Detectives Extraordinaire

by [Valerie Nielsen](#)

WhatsApp Integration



USER EXPERIENCE



Customer
Value

- Use WhatsApp for chat with patrons for real-time assistance regardless of where they are accessing your content from




Feature
Highlights

- Simple integration allows for user to launch WhatsApp chat widget using WhatsApp API

A-Z List RefWorks Log In Feedback Help



Your Message:

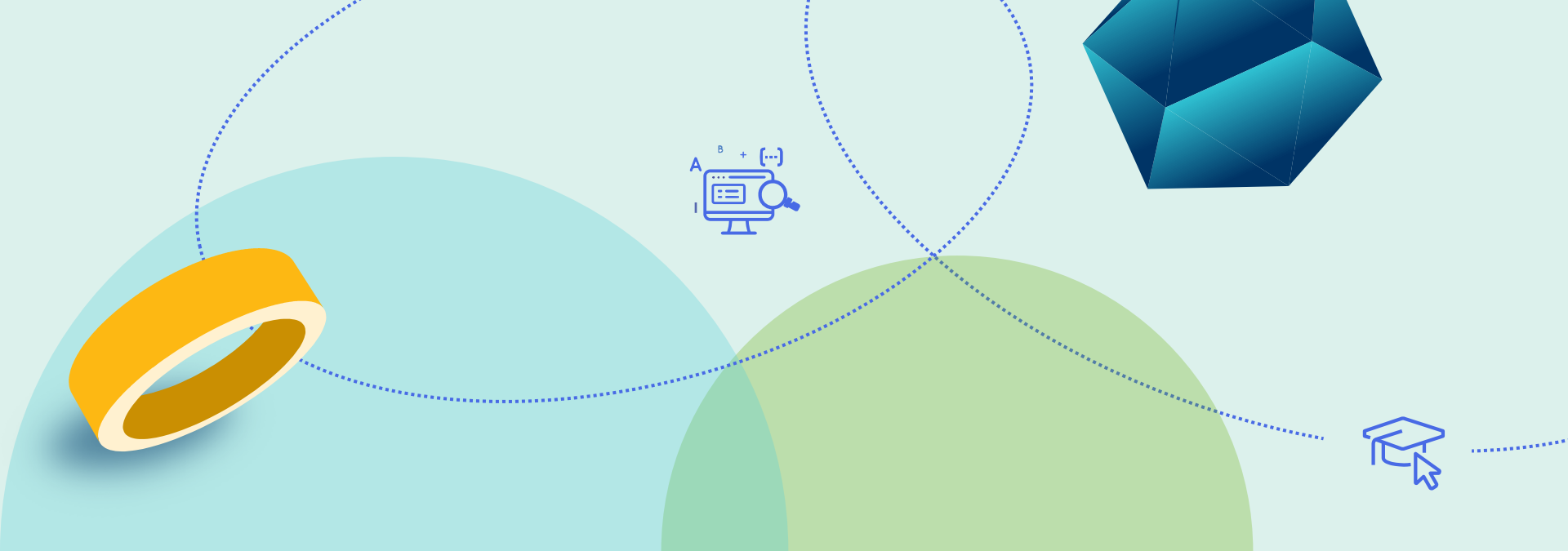
 Start WhatsApp Chat

From Wikipedia

Marmot

Marmots are relatively large ground squirrels in the genus "Marmota", with 15 species living in Asia, Europe and North America. These herbivores are active during the summer when often found in groups, but are not seen during the winter when they hibernate underground. They are the heaviest members of the squirrel family.

[Read more](#)



August Release

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Add Section number to Course ID in Course Reserves page



USER EXPERIENCE

NERS



Customer
Value

- Simplify finding course materials by including section numbers with Course ID



Feature
Highlights

- Display of multiple Section Numbers with each result in the Course Reserves page

Home Course Reserves A to Z list Feedback Help

Search by course name, description, or instructor

Course Reserves (265)

Course ID	Description	Instructor
AA-279C-01	Spacecraft Attitude Determination and Control	Julie, Mars
ACCT-212-01-04	Managerial Accounting: Base	Amber, Stars
ACCT-524-01	Individual Taxes and Financial Planning	Robert, Muler
ACCT-542-01	Corporate Taxes and Business Strategy	Jackie, Swanson
AMSTUD-160-01	Perspectives on American Identity	Peter Klein
ANTHRO-112-01	Public Archaeology: Market Street Chinatown Archaeology very long name very long name very long name very long name...	Klaus, Otter
CEE-263A-01	Air Pollution Modeling	Lillie, House
CME-206-01	Introduction to Numerical Methods for Engineering	Marie, Cure
CS-106A-01	Programming Methodology	Lisa, Morison
LAW-558-01	Workshop on International Security, Law, and Social Science	Sue, Nelson
LAW-588-01	Sports Law	Maxim, Dole
STRAMGT-353-01-03	Entrepreneurship: Formation of New Ventures	Sofie, Madeline
STRAMGT-353-01-03	Entrepreneurship: Formation of New Ventures	Henri, Mouse
STRAMGT-359-01	Aligning Start-ups with their Market	Niva, Teline
STRAMGT-359-01	Aligning Start-ups with their Market	Aleksandra, Novaya
STRAMGT-368-01	Strategic Management of Nonprofit Organizations and Social	Mila, Slovi

Consistent Link Back to Search Results



USER EXPERIENCE

NERS



Customer
Value

- Create consistent navigation experience for patrons



Feature
Highlights

- Make return paths from advanced search, the saved folders and other elements consistent

Improve peer-review labeling



USER EXPERIENCE

NERS



Customer
Value

- Quickly identify peer-reviewed content within Summon results



Feature
Highlights

- Clearly label peer-reviewed content
- Functionality in addition to peer review facet

Display books and ebooks edition and publication year



USER EXPERIENCE

NERS



Customer
Value

- Easily identify difference between editions of books and ebooks



Feature
Highlights

- Reduce appearance of duplicates by clearly labeling editions
- Increase usefulness of metadata displayed

Accessibility improvements for WCAG compliance

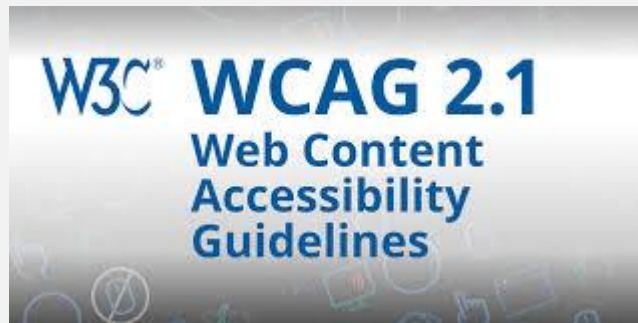


USER EXPERIENCE



Customer
Value

- Ensure important content is accessible to all patrons



Feature
Highlights

- Complete review of Summon User Interface for compliance to accessibility guidelines
- Improvements based on internal and external evaluation and input



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Clarify author and editor in results and citations



USER EXPERIENCE

NERS



Customer
Value

- Better visual treatment of author and editor in results and citations



Feature
Highlights

- Distinguish between author and editor in brief preview in results

Databases A-Z List within Summon

NERS



SEARCH AND EXPLORING



Customer
Value

- Expose all resources they have access to for the end patron



Feature
Highlights

- Provide pathway to discovery A to Z list of all databases

Mechanism for Best Bets to 'harvest' LibAnswers FAQs



Customer
Value

- Easily find and implement new FAQs quickly using existing systems



Feature
Highlights

- Use LibAnswers API to harvest LibAnswers to include in Best Bets
- Generate keywords using the metadata from LibAnswers

Persistent Search Refinements



SEARCH AND EXPLORING



Customer
Value

- Allows for moving dynamically between basic and advanced search, bringing any refinements along with each search



Feature
Highlights

- Consistency in application of facets and inputs across basic and advanced searches
- Retention of search parameters as the user moves between search screens

Sierra Integration (Initial Phase)



Customer
Value

- Better integration of library systems and Summon



Feature
Highlights

- Allow for quicker, easier access to holding or checking out content
- Simplify administration by staff
- Initial Phase will include requirement development, planning and initial internal integration
- Timing for release of external facing functionality and integration will be based on outputs from initial phase



Additional NERS Feature: Analysis for SAML/federated/"Shibboleth" login option

Analysis for SAML / federated / "Shibboleth" login option



Customer Value

- Saved searches is currently supported via MS OneDrive or Google Drive
- Desire for SAML-based, federated authentication option for this feature and others



Feature Highlights

- Analysis to determine best path forward for supporting improved integration
- Will take into consideration options for login to support Saved Searches, better integration with library services, and other opportunities

Analysis for SAML / federated / "Shibboleth" login option

- Research outputs will include:
 - Initial analysis and planning
 - Outreach to Summon community to determine needs and priorities
 - Recommendation for development of functionality and project milestones / phases
- Timing for delivery of any functionality to be determined based on inputs from analysis



Thank you!

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