



Summon Roadmap Highlights

Proposed Product Feature Set for 2018

Roadmap Confidentiality

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2018 Roadmap Areas & Highlights



Library Empowerment

- Increased frequency of catalog updates
- Ability to configure Topic Explorer and prioritize presentation order
- Option to force Summon over HTTPS



Openness

- API documentation and blog posts
- Open Access facet reporting



User Experience

- Search history (session based)
- Ability to customized Advanced Search fields*
- Allow library to set whether electronic or print item displays first*
- Add results beyond your library's collection should not appear when results are refined to library catalog*



Exploration Services & Relevance

- Citation trail
- Journal Search improvements
- Topic Explorer improvements
- Linked Data



Analytics & Reporting

- Click tracking
- Additional Documentation for OBI

* Features from the IGeLU/ELUNA New Enhancement Requests System

Summon 2018 Release Dates

FEBRUARY RELEASE

- February 7th – Release launch date

MAY RELEASE

- May 10th – Release launch date

AUGUST RELEASE

- August 1st – Release launch date

NOVEMBER RELEASE

- November 7th – Release launch date

**February
2018**

**May
2018**

**July
2018**

**November
2018**

- The release date refers to the go live date for production. Preview environments will be available 2 weeks in advance.
- Regular maintenance updates and releases will be scheduled for the first Wednesday of all other months.

Summon 2018 Release Plan

FEBRUARY RELEASE

- February 7th

MAY RELEASE

- May 10th

AUGUST RELEASE

August 1st

NOVEMBER RELEASE

- November 7th

February 2018

- Allow library to set if electronic or print item displays first (NERS)
- “Add results beyond your library...” should not appear when results refined to catalog (NERS)
- Custom Location Mapping
- Configurable force redirect to HTTPS

May 2018

- Save Search –save locally, for import at a later date
- Advanced Search Form Customization
- Search within Journal from Journal Title in search result
- Customize Topics Display

August 2018

- Increased frequency of catalog updates
- Journal Ranking Boost
- Multilingual search improvements
- Did You Mean Improvements

November 2018

- Citation Trail
- Linked Data Support

- Additional NERS features from 2018 voting process

Search speed improvements

2018 Release Schedule

- Major releases scheduled for February, May, August and November
 - Includes preview environment two weeks prior to release
 - Full documentation, including release notes
- First Wednesdays of all other months planned maintenance releases
 - Includes March, April, June, September, October, and December
 - Will skip for months where no maintenance is required
 - Will Skip July 4th release due to US Holiday
 - Limited to features that do not impact the end user without activation
 - No preview environment
 - Minimal documentation



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February Release

More Details by Feature

Release Date: February 7th


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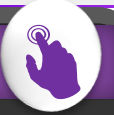
Customer Benefit

- Ensure secure connections to Summon for all users



Feature

- While your site may be HTTPS compliant, URLs from outside of your site (such as links from bookmarks, emails or typed in the browser's address bar) may be referred across HTTP rather than HTTPS
- For any referring URL, direct the traffic over HTTPS regardless of the original URL
- You can turn this on or off for your institution



Customer Benefits

- Improve presentation and functionality within Summon

Feature

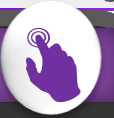
- Allow library to set whether electronic or print item displays first
- Add results beyond your library's collection should not appear when results are refined to library catalog



May Release

More Details by Feature

Release Date: May 10th



Customer Benefits

- Ability to review and refine past searches in a given session
- Ability to preserve those searches via export

Feature



- Provide search history on a session by session basis
 - Ability to display search history searches as configured, including facets, date ranges and keywords
- History is cleared after the session
- User is able to export history for use/import



Customer Benefit

- The potential to increase the number of matches to Topic Explorer and ensure users are finding the resources available to them

Feature

- Allow for Topic Explorer to display even no when encyclopedic article is available
- Ability to turn on or off each element
 - Encyclopedia entry
 - Suggested Librarian
 - Related Topics
 - Recommended Research Guides
- Ability to determine order of display for each element


From Wikipedia, the free encyclopedia

Physics

Physics (from) is a natural science that involves the study of matter and its motion through space and time, along with related concepts such as energy and force. More broadly, it is the general analysis of nature, conducted in order to understand how the universe behaves.

[Read more](#)

Suggested Librarian



Brent D. Cook
[Send Email](#)

Related Topics

- [Particle physics](#)
- [Biophysics](#)
- [Condensed matter physics](#)

Recommended Research Guides

- [Browse Databases by Subject. Recommended Databases for Physics. Recommended Databases](#)
- By Martha Brady
- [Physics](#)
- By Brent D. Cook

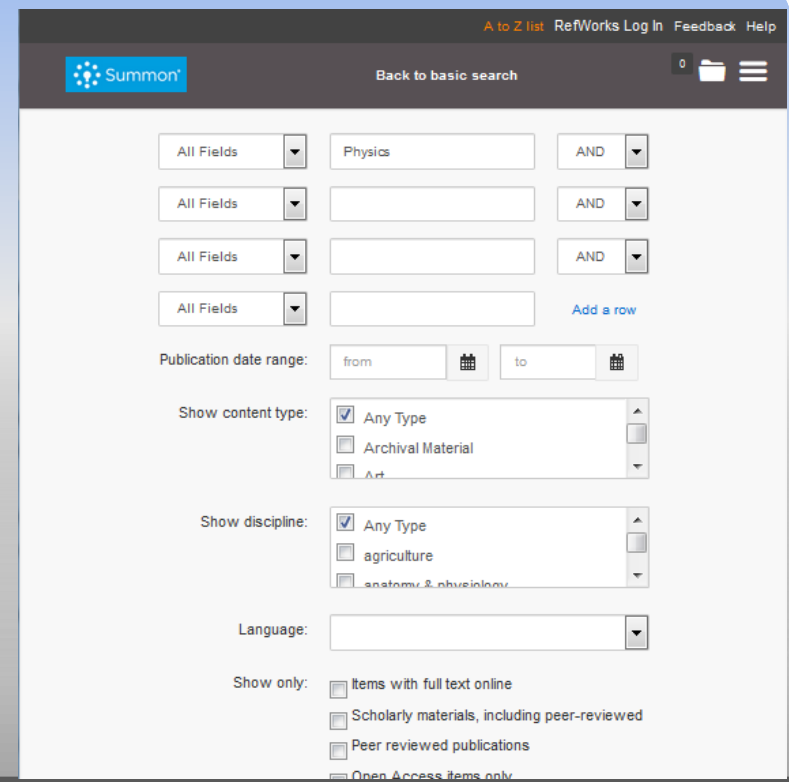


Customer Benefits

- Provide a user experience tailored to your institution and your power users' needs

Feature

- Turn Advanced Search form fields on or off
- Determine order of fields



The screenshot shows the Summon search interface. At the top, there are navigation links: "A to Z list", "RefWorks Log In", "Feedback", and "Help". Below this is the Summon logo and a "Back to basic search" link. The main search area features four rows of search criteria, each with a dropdown menu set to "All Fields", a text input field (the first contains "Physics"), and a dropdown menu set to "AND". Below these is a "Publication date range" section with "from" and "to" date pickers. There are two "Show content type" and "Show discipline" sections, each with a list of checkboxes: "Any Type" (checked), "Archival Material", and "Art". A "Language" dropdown menu is also present. At the bottom, there is a "Show only" section with several checkboxes: "Items with full text online", "Scholarly materials, including peer-reviewed", "Peer reviewed publications", and "Open Access items only".



Customer Benefit

- Make exploring the content of a specific journal even easier



- Click on a journal title activates Search within Journal for that publication

Feature

2,191,164 results sorted by [relevance](#)

Add results beyond your library's collection

1



British journal of hospital medicine

British journal of hospital medicine, 1968

Journal: [Check Availability](#)

Preview

[Permanent Link](#)

Source: [University Library Catalog](#)
Publication Title: [British Journal of Hospital Medicine](#)
Publisher: Hospital Medicine Publications
Date : 1968



Search within **British Journal of Hospital Medicine** Clear filter





August Release

More Details by Feature

Release Date: August 1st


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Customer Benefit

- Provide access to new content as quickly as possible to users

Feature

- Target frequency would be daily
- Minimum Viable Product would be ability to have adds processed
- Will try to include deletes and changes, however, this may introduce duplicates for a brief period of time



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Customer Benefit

- Improve interaction between elements within relevance to improve overall relevance ranking for the end user

Feature

- Journal Ranking Boost
 - Based on Journal Title keywords in search terms
- Multilingual search improvements
- Did You Mean Improvements

November Release

More Details by Feature

Release Date: November 7th





Customer Benefit

- Allow users to discover additional content related to a specific article by using citations

Feature

- Ability to explore and discover texts using citations within the text as navigation
- Ability to explore article that reference a specific text

Find sources



cited in this

or sources



citing this



Customer Benefit

- Improved exploration by connecting the discovery interface and external linked data sources

Feature

- Display links, data, and services based on harvested URIs, enriching the discovered content to make use of linked data*
- Examples may include displaying related subject terms and providing connections based on authors' names

* Some of these services will rely on the maturity of publishers' harvested linked data information.



Roadmap Items: Ongoing in 2018



Customer Benefits

- Expand capabilities for libraries leveraging the Summon API for discovery

- Documentation for any functionality added to the API
- How to or example code via blog posts

Feature

The screenshot shows the ExLibris Developer Network page for the Summon API. The page header includes the ExLibris logo, a navigation menu with links for Docs, Tech Blog, Code & Apps, Forum, and Dashboard, and a search bar. Below the header, there are resource links for Primo, Alma, Rosetta, Leganto, Summon, SFX, Aleph, and Voyager. The main content area features a paragraph describing the Summon API's use for creating a unified search experience. Below this, there are sections for 'APIs' with a 'Learn' link and a list of links for 'Summon APIs' and 'Search APIs', and a 'Share' section with a link to the 'Summon Developers Blog' and a 'Latest entries' section.

- Open Access Facet Reporting (Idea Exchange)
- Click tracking (Idea Exchange)



THANK YOU

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