



Summon Roadmap Highlights

2017

Roadmap Confidentiality

The information provided here gives a high level view of the planned roadmap for Summon and the new functionality that will be available. The information in this document is confidential and proprietary to Ex Libris.

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2017 Roadmap Areas & Highlights



Library Empowerment

- Preview Environment v2
- Increased frequency of rights
- Summon Over Alma
- Content indication in Summon index



User Experience

- Results Page Improvements
- Search within Journal
- Course Reserves
- Discipline on Advanced Search
- Scholar Profiles



Exploration Services & Relevance

- bX Recommender
- Syndetics Unbound
- Subject Term controls in UI



Openness

- Open access: filter & UI Indicator
- API Documentation
- Integration with Dev Network
- Topic Explorer for API



Analytics & Reporting

- OBI: Additional Events
- OBI: Custom Reports

Summon 2017 Release Plan

FEBRUARY RELEASE

- February 1st – Release launch date

MAY RELEASE

- May 3rd – Release launch date

JULY RELEASE

- July 26rd – Release launch date

NOVEMBER RELEASE

- November 15th – Release launch date

February
2017

May
2017

July
2017

November
2017

* The release date refers to the go live date for production. Preview environments should be available 2 weeks in advance.

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**February
2017**

- Bug fixes and customer requirements
- Topics, Best Bets and Resource Recommender follow up from December release
- Responsive design menu refactoring

**May
2017**



- bX Recommender
- Syndetics Unbound
- Preview Environment v2
- Summon over Alma
- Open access: filter and UI Indicator
- Discipline on Advanced Search form

**H2
2017**

- Increased frequency of rights
- Scholar Profiles
- Search within a Journal
- UI Improvements
- Availability for API
- Topics for API
- Controlled Vocab: Subject terms in the UI
- Course Reserves

Additional Candidate Roadmap Items

Roadmap items that are not associated with a specific release:

-  **Addition of the API documentation to the Dev Network**
 - Initial milestone will be moving over current documentation
-  **Relevance Improvements—release of functionality will depend on results of testing of system improvements**
 - English V2
 - German V2
 - Citation Query



Sort by Date issue



Increase available results from 200 to 1,000





Customer Benefit

- Enhanced integration of library management and discovery services

Feature

- **Services page**
 - Delivery of patron account data in Alma
 - Ability for users to log in to view their account information
 - A customizable page that shows items checked out, holds, fines, etc.
- **Publish catalog data**
 - Rather than the output from Voyager of new/changed records and the batch input into Summon, Alma will “publish” new and changed records from the Alma bibliographic database to Summon
 - These records will be picked up by the Summon indexing programs
- **Rights management for e-resources**
 - “Client center” functions embedded in Alma
 - Single activation – there is no need to activate in both Alma and Summon, just a new process



Customer Benefit

- Enhanced integration of library management and discovery services

The screenshot displays the 'My Library Card' page for SOA Library. The page is organized into several sections:

- Loans:** Lists three items with their due dates and return locations. A 'RENEW ALL' button is visible at the top right of this section. A 'VIEW ALL 4 LOANS' button is at the bottom.
- Requests:** Lists three items in process. A 'VIEW ALL 35 REQUESTS' button is at the bottom.
- Fine + fees:** Shows a 'Current fines balance is 0.00' and a smiley face icon with sunglasses, indicating no fines.
- Blocks + messages:** Shows an umbrella icon, indicating no blocks or messages.

The top navigation bar includes 'OVERVIEW', 'LOANS', 'REQUESTS', 'FINE + FEES', 'BLOCKS + MESSAGES', and 'PERSONAL DETAILS'. The 'LOANS' tab is currently selected. The top right corner shows 'exl_impl ENGLISH'.



Customer Benefit

- Allows for turning new features on and off and enables adjustment of configuration of User Interface (including changing logos, colors, and active features) in a preview environment

Settings

Toggle	Setting Name	Value	Help
<input type="checkbox"/> CUSTOM	Page Title	Summon Demo Site 1	?
<input type="checkbox"/> CUSTOM	Home Link	http://www.proquest.com/products-services/The-Summon-Service.html	?
<input type="checkbox"/> CUSTOM	Feedback Email Address	person@mail.com	?
<input type="checkbox"/> DEFAULT	Feedback Client Email Required	OFF	?
<input type="checkbox"/> DEFAULT	Feedback Link		?
<input type="checkbox"/> DEFAULT	Feedback Roles	ON	?
<input type="checkbox"/> DEFAULT	About Link		?
<input type="checkbox"/> DEFAULT	Help Link		?
<input type="checkbox"/> CUSTOM	Enable Rss Icon	ON <input checked="" type="radio"/> On <input type="radio"/> Off	?
<input type="checkbox"/> DEFAULT	Saved Items Help Link		?
<input type="checkbox"/> DEFAULT	Autocomplete Enabled	ON	?
<input type="checkbox"/> DEFAULT	Query Suggestions Enabled	ON	?
<input type="checkbox"/> DEFAULT	DB Recommender Enabled	ON	?
<input type="checkbox"/> DEFAULT	Related Records Enabled	OFF	?
<input type="checkbox"/> DEFAULT	Call Numbers Enabled (Availability)	OFF	?
<input type="checkbox"/> DEFAULT	Dewey Numbers Enabled (Availability)	OFF	?
<input type="checkbox"/> DEFAULT	Call Numbers Enabled (Preview)	ON	?
<input type="checkbox"/> DEFAULT	Dewey Numbers Enabled (Preview)	OFF	?

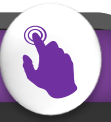


Customer Benefit

- Increase the speed to which content rights are enabled

Feature

- **Faster activation or removal of resources**
- **Ability to update rights daily**



Customer Benefit

- Improve the usability of the Summon results page through various enhancements

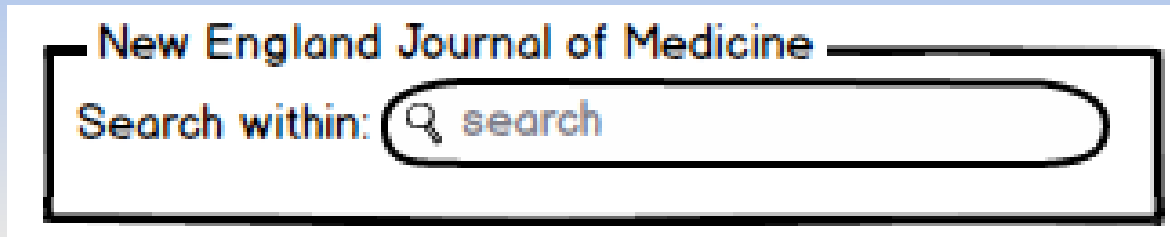
Feature

- **Accessibility improvements**
- **Icon and background color cleanup**
 - Better contrast
 - Ability to change icons
 - Decouple header colors from menu colors
- **Permalink placement improvement**
- **Improved use of third column**
- **Expand access to results beyond 200**



Customer Benefit

- Improve overall discoverability of journal articles with a widget that allows for a search that's pre-scoped to only a specific journal





Customer Benefit

- Enable search and display of course reserve information through Summon

**only available for Summon over Alma customers*

Feature

- **Displaying an individual institution's course info on a record in Summon**
- **Displaying course info on a record in the services page**
- **Indexing course info and returning results for course keywords in Summon**
- **Course info facets in Summon**



Customer Benefit

- Allow option for users to pre-filter a search by discipline(s) similar to created a scoped search via the widget builder.

The screenshot displays the Summon advanced search interface. At the top left is the Summon logo, and at the top center is a link to "Back to basic search". The main search area consists of four rows, each with a dropdown menu set to "All Fields", an empty search input field, and a dropdown menu set to "AND". Below these rows is a blue "Add a row" link. Further down, there are several filter sections: "Publication date range" with "from" and "to" date pickers; "Show content type" with checkboxes for "Any Type" (checked), "Archival Material", and "Art"; "Search by discipline" with checkboxes for "Agriculture" (checked), "Anatomy & Physiology", and "Anthopology"; "Language" with a dropdown menu; "Show only" with checkboxes for "Items with full text online", "Scholarly materials, including peer-reviewed", "Peer reviewed publications", and "Items in the library catalog (includes mostly print and physical material)"; and "Exclude from results" with checkboxes for "Newspaper articles" and "Book Reviews".



Customer Benefit

- Provide patrons a starting point for learning about or delving into the research of a specific author

Feature

- **Highlights author and scholar profiles for searches for author's names**
- **Delivers details such as:**
 - Brief author's Bio
 - A thumbnail image
 - Links to appropriate content (based on rights)
- **Works in conjunction with Topic Explorer**



Customer Benefit

- Recommend other content based on a specific results or “users who were interested in this article were also interested in...”

The screenshot displays a search interface with the following elements:

- Search Bar:** Contains the query "A three-dimensional actuated origami-inspired transformable metamaterial with multiple degrees of freedom".
- Filters (Left Sidebar):**
 - REFINE YOUR SEARCH:** Full Text Online, Scholarly & Peer-Review, Peer-Review, Library Catalog.
 - CONTENT TYPE:** Newsletter (2), Newspaper Article (2), Journal Article (1) (checked).
 - PUBLICATION DATE:** Sliders for "from" and "to" dates, with options for Last 12 Months, Last 3 years, and Last 5 years.
 - DISCIPLINE:** biology (1).
 - SUBJECT TERMS:** mechanical metamaterials (1).
- Search Results (Center):**
 - 1 result sorted by **relevance**.
 - Article title: **A three-dimensional actuated origami-inspired transformable metamaterial with multiple degrees of freedom**.
 - Author: **by Overvelde, Johannes T.B.; de Jong, Twan A.; Shevchenko, Yanina; More...**
 - Source: **Nature Communications, 2016, Volume 7**
 - Abstract: "... We show both analytically and experimentally that the **transformable metamaterial** has three **degrees of freedom**, which can be actively deformed into numerous specific..."
 - Journal Article: [Full Text Online](#)
 - Metrics: **WEB OF SCIENCE™ 2**, **385**, **bX Related Articles**
 - Preview: [Permanent Link](#)
 - Text: "Reconfigurable devices, whose shape can be drastically altered, are central to expandable shelters, deployable space structures, reversible encapsulation systems and medical tools and robots. All these applications require structures whose shape can be actively controlled, both for deployment and to conform to the surrounding environment. While most current reconfigurable designs are application specific, here we present a mechanical metamaterial with tunable shape, volume and stiffness. Our approach exploits a simple modular origami-like design consisting of rigid faces and hinges, which are connected to form a periodic structure consisting of extruded cubes. We show both analytically and experimentally that the transformable metamaterial has three degrees of freedom, which can be actively deformed into numerous specific shapes through embedded actuation. The proposed metamaterial can be used to realize transformable structures with arbitrary architectures, highlighting a robust strategy for the design of reconfigurable devices over a wide range of length scales. Typically, most structures and devices that can be reconfigured are designed with application specific requirements. Inspired by modular origami ideas, Overvelde et al. present a mechanical metamaterial enabling the design of three-dimensional structures of arbitrary architecture with tunable shape, volume and stiffness."
 - Metadata: **Cited by:** 2 Web of Science™; **Source:** Web of Science; **Publication Title:** Nature Communications; **Publisher:** NATURE PUBLISHING GROUP
- Related Articles (Right Sidebar):**
 - Quality characteristics of imitation crab sticks made...** by Hur, S.J.; Choi, B.D.; Choi, Y.J.; More... (LWT - Food Science and Technology, 2011, Volume 44, Issue 6)
 - Can exercise advice be 'made to stick'?** Combining psychology and... by Macri, E.H.; Young, V.C.; Khan, K.M. (BRITISH JOURNAL OF SPORTS MEDICINE, 11/2010, Volume 44, Issue 14)
 - Made to Stick: Why Some Ideas Survive and Others Die** by Randy Adams (Community Development, 01/2008, Volume 39, Issue 1)
 - Heterometallic Rings Made From Chromium Stick Together Easily** by Timco, G.A.; McInnes, E.J.L.; Pritchard, R.G.; More... (ANGEWANDTE CHEMIE-INTERNATIONAL EDITION, 2008, Volume 47, Issue 50)



Customer Benefit

- Create a more rich user experience on the catalog details page

Summon

girl on the train

Advanced

0

Outstanding fines will prevent you from checking out additional items and may affect your ability to register for classes or graduate.

More From Syndetics Unbound

Summary	About The Author	Look Inside	You May Also Like
Browse Shelf	Professional Reviews	Reader Reviews	Tags
Book Profile	Reading Level	Awards	

Summary


Instant #1 *New York Times* Bestseller

"*The Girl on the Train* has more fun with unreliable narration than any chiller since *Gone Girl*. . . [It] is liable to draw a large, bedazzled readership."—*The New York Times*

"Like its train, the story blasts through the stagnation of these lives in suburban London and the reader cannot help but turn pages."—*The Boston Globe*

"*Gone Girl* fans will devour [\(read more\)](#)

About The Author

 **Paula Hawkins**

Paula Hawkins was born in Zimbabwe on August 26, 1972. She studied philosophy, politics, and economics at the University of Oxford. She worked as a journalist for fifteen years and wrote a financial advice book for women entitled *The Money Goddess*. Her first novel, *The Girl on the Train*, was published in 2015 and was released as a feature film in 2016. She made the *Hollywood Reporter's* [\(read more\)](#)

Image courtesy LibraryThing

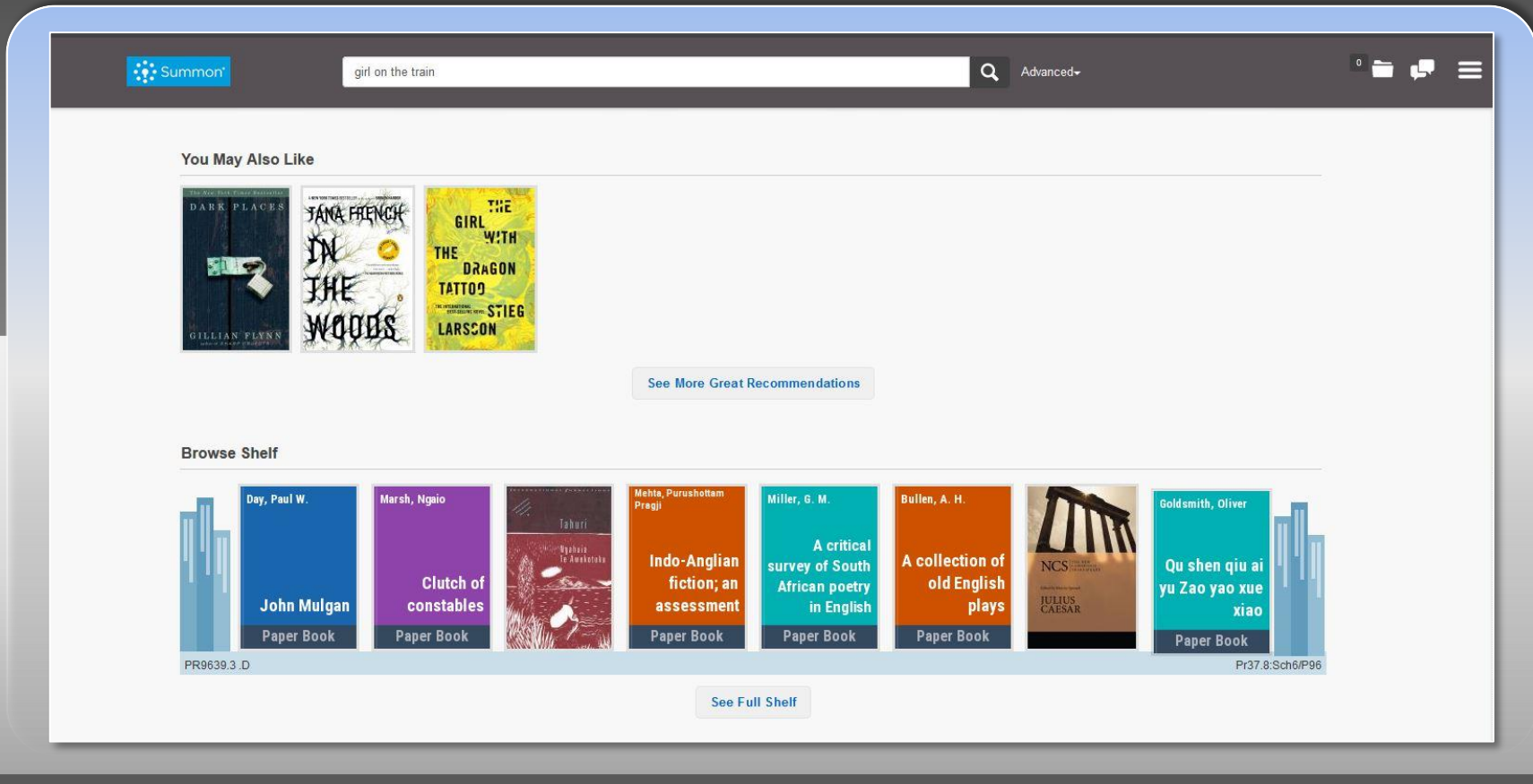
Look Inside

This excerpt is from an advance uncorrected



Customer Benefit

- Include the ability to “browse the shelf,” add recommendations and reviews, and a variety of other content





Customer Benefit

- In both the preview pane and the catalog detail page, complete Subject Terms strings are clickable search links that lead to results created by combining the individual terms

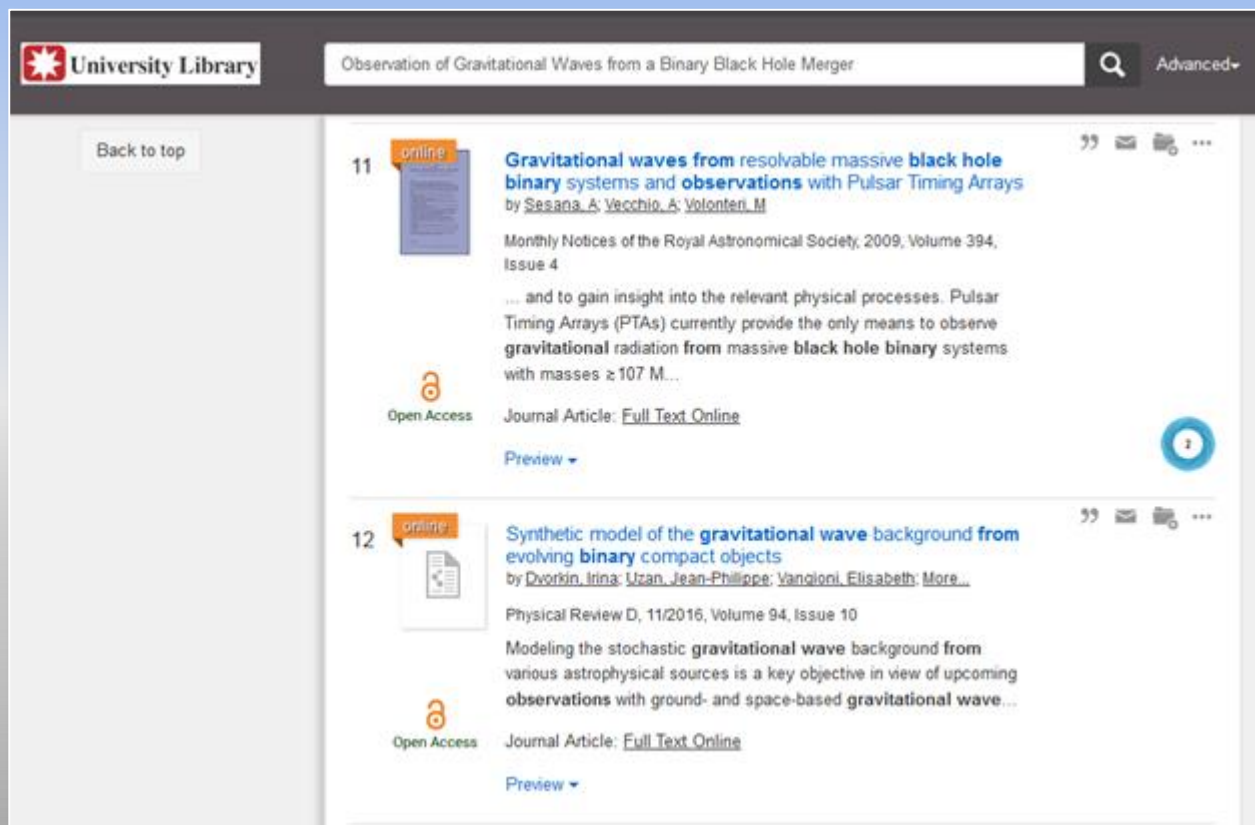
More Details

Title:	The king is dead
Subtitle:	the last will and testament of Henry VIII
Publisher:	Head of Zeus
Date:	2015
Place:	London
ISBN:	1784081922, 9781784081928
Discipline:	History & Archaeology
Subjects:	Great Britain — History — Henry VIII, 1509-1547. Henry — VIII, — King of England, — 1491-1547 — Will. Wills — England — History — 16th century.
Language:	English
Notes:	<ul style="list-style-type: none">▪ Includes bibliographical references and index



Customer Benefit

- Enable identification of Open Access content through addition of a facet, an icon on the results page, and option on the advance search form





Customer Benefit

- Expand capabilities for libraries leveraging the Summon API for discovery

Feature

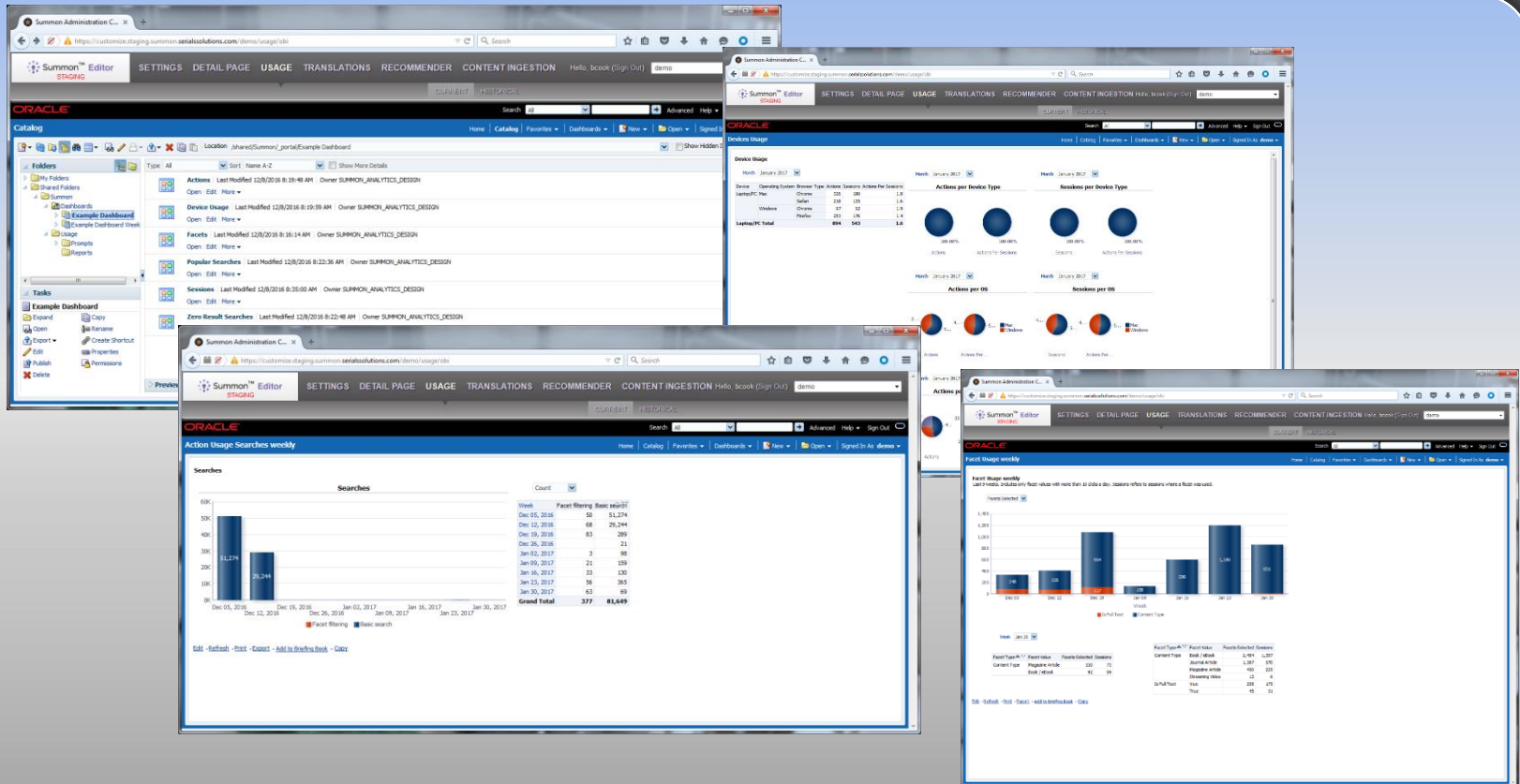
- **Availability for API**
 - Ability for API users to display availability information for content an institution has rights to
- **Topics for API**
 - Provide access to the necessary fields to create the topic explorer pane
 - Should provide institution the ability to create a topic explorer with the same contents: Encyclopedia resource, suggested librarian, Recommended topics, Recommended Research Guides
- **Improved API Documentation**
 - Movement of documentation to Ex Libris Developers Network
 - Addition of updated examples

New Summon Usage Reports and Analytics



Customer Benefit

- Generate and share reports faster and easier, with more accurate and more in-depth information





THANK YOU

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