



# Converis Product Update

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# Agenda

- Research management with Converis
- Converis as part of Ex Libris
- Converis 2022 and beyond





# Research management with **Converis**

# Converis Modules

Converis



## Pre & Post Award

- Projects and project applications
- Project workflows
- Finance/HR integration

## Publication Management

- Publication import
- Push for validated publications from Converis to ORCID.

## Research Portal

- Showcase for research outputs

## Intellectual Property

- Applications for licences and patents
- Association with the originating projects.

## Graduate Student Management

- Graduate student research
- Study plans
- Supervisory meetings.

## Advanced Analytics

- Reporting
- Report design and creation

# Flexibility – central to Converis

Converis can be configured to a very large degree

**Data model:** adding entities, link entities, attributes and relation type attributes to capture any type of information.

**User rights:** Adding new user roles or modifying existing ones on a granular level down to view and edit rights on individual attributes and relations.

**Workflows:** Adding or modifying workflow steps per entity, user rights per user role and workflow step, setting up notifications.

**Templates:** Layout and structure of detailed pages for the Research Portal, browse pages and static pages, and changing most texts in the system.

**Integrations:** The mapping can be changed for standard or new integrations can be set up using Converis Data Integration Server.

**Converis Web Services** for reuse of data marked as public to present on any web pages

**Reports:** Supports full Business Intelligence functionality with possibilities to manage data sources and to design custom reports.



## Converis as part of Ex Libris

# Converis as part of Ex Libris

## LIBRARY MANAGEMENT

Alma  
Rapido  
RapidILL  
Rosetta

## DISCOVERY

Primo  
Summon  
SFX

## RESEARCH

Esploro  
Converis  
Pivot-RP

## LIBRARY MOBILE & LEARNING

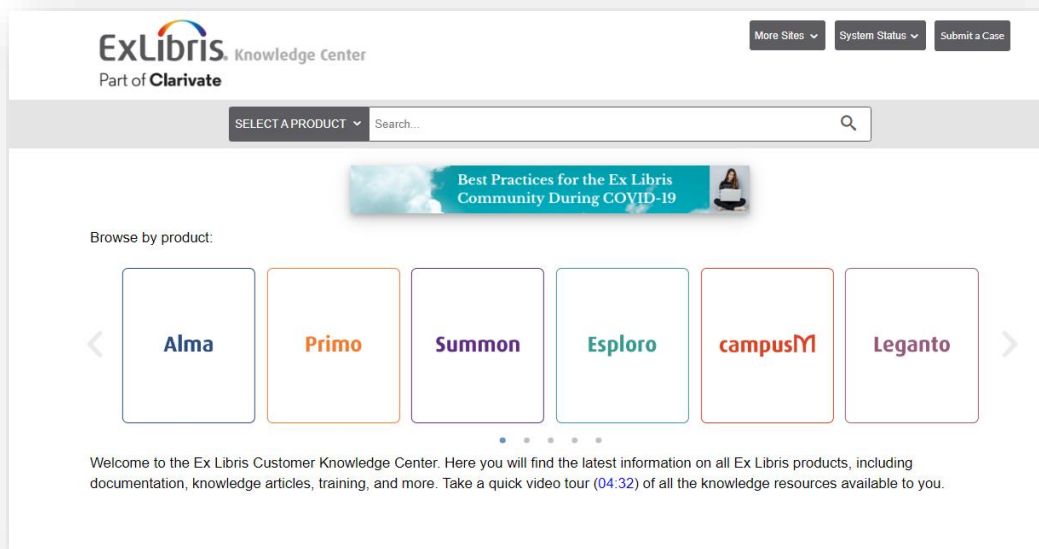
campusM  
Leganto

# Converis as part of Ex Libris

- The team remains as is

Contact us at [converis-info@clarivate.com](mailto:converis-info@clarivate.com)

- Converis documentation will be moved to the Ex Libris KnowledgeCenter  
<https://knowledge.exlibrisgroup.com/>





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- Converis documentation will be moved to the Ex Libris KnowledgeCenter  
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- We published the roadmap on the Ex Libris KnowledgeCenter  
[https://knowledge.exlibrisgroup.com/Converis/Product\\_Materials/Roadmap/Converis\\_Roadmap\\_2022\\_-\\_H1%2F%2F2023](https://knowledge.exlibrisgroup.com/Converis/Product_Materials/Roadmap/Converis_Roadmap_2022_-_H1%2F%2F2023)

- Another important change:

- Two major releases per year
- Bug fix releases in between

## Bi-annual major releases:

- v6.18 September 2022
- v6.19 March 2023



## Converis 2022 and beyond

# Roadmap published

[https://knowledge.exlibrisgroup.com/Converis/Product\\_Materials/Roadmap/Converis\\_Roadmap\\_2022\\_-\\_H1%2F%2F2023](https://knowledge.exlibrisgroup.com/Converis/Product_Materials/Roadmap/Converis_Roadmap_2022_-_H1%2F%2F2023)

The screenshot displays the ExLibris Knowledge Center interface. At the top, the logo for ExLibris Knowledge Center is visible, along with navigation links for 'More Sites', 'System Status', and 'Submit a Case'. The main content area features a breadcrumb trail: Home » Converis » Product Materials » Roadmap » Converis Roadmap 2022 - H1/2023. The title 'Converis Roadmap 2022 - H1/2023' is prominently displayed. Below the title, there are social media sharing icons and a 'Table of contents' button. The 'Release Schedule' section lists major releases twice a year, with planned major releases for v6.18 in September 2022 and v6.19 in March 2023. The 'Roadmap Focus 2022 and Plans for H2/2022 and H1/2023' section includes an 'Overview' and a 'Quality Assurance (v6.17)' section, which mentions 'Increased testing on customized environments'.

ExLibris Knowledge Center  
Part of Clarivate

More Sites System Status Submit a Case

Converis

Home » Converis » Product Materials » Roadmap » Converis Roadmap 2022 - H1/2023

## Converis Roadmap 2022 - H1/2023

Roadmap | RefWorks | Table of contents

### Release Schedule

- Major releases are twice a year, with bug fix releases every second week.
- Planned major releases:
  - v6.18 September 2022
  - v6.19 March 2023

### Roadmap Focus 2022 and Plans for H2/2022 and H1/2023

#### Overview

The Converis roadmap provides a view of what we did in H1 2022, as well as a preview of what is planned for H2 2022 and H1 2023. We particularly focus on areas such as ease of use (usability), stability and quality, enhancements/features based on AHA and community feedback, and further integrations.

#### Quality Assurance (v6.17)

Introduction of new and enhanced measures for ensuring quality release and release upgrades:

- Increased testing on customized environments

Feedback

2022

2023

## Focus areas

- Stability and quality
- Customer generated enhancements
- Integrations with other used products

## Focus areas

- Ease of use
- Customer generated enhancements
- Integrations with with other used products
- Stability and quality

February release (6.17)

September release (6.18)

March release (6.19)

September release (6.20)

Change of release schedule to twice a year  
(March/September)

- VIVO Connector
- WoS Expanded integration with REST API
- Quality assurance enhancements

- General enhancements**
- Pentaho upgrade
  - Status comment field enhancement
  - Archiving feature enhancement

- Integration enhancements**
- Journal Citation Reports (JCR)
  - HR (Human Resources) Integration

- General enhancements**
- Delegation management enhancements
  - Flexinumber improvement

- Integration enhancements**
- Incites API V2
  - Web of Science more collections

- Ease of use (usability) – shorten heavily used processes
- Enhancements/ Features based on AHA
- Further Integrations
- Stability and Quality (stable bug backlog)

# Quality assurance

- Increased testing on customized environments
- Earlier testing processes
- Increased number of automated test scenarios
- Daily performance tests
- Quicker releases for important bug fixes

# (Workflow) Status comment field enhancement

- New choice added – now three options are available (configurable per workflow matrix)

1. No comment field
2. Comment field that is mandatory to be filled in
3. Comment field that is optional to be filled in

### Workflow Matrix ?

**Edit:** Library

Select user role: Library  
 Select entity: Publication  
 Selector CGV: Journal article  
 Status comment:  Optional  Mandatory

**(Column C)** This setting applies to the entire workflow matrix. It is not possible to set if comment is set to mandatory, the user can save the entity in a different status if filled in.  
 To remove the status comment field entirely from a specific status, uncheck

	New status	1	C	2	C	3	C	4
Current status	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Non-validated	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For validation by library	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Validated	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Archived	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

**Set status**

This needs a further validation because of....

46/1024

**Non-validated**  
 Choose this status if you wish to continue working on this record at a later stage.

**For validation by library**  
 In this status, the library will validate the record.

**Validated**  
 In this status, the record has been validated.

**Archived**  
 An archived publication is no longer

... and a small addition: We added a character count function to the comment field

# JCR enhancements for JCR subscribers

- Move from file upload to **API**  
**JCR data is added to the edit and browse windows** of journals under Publication Management -> Journals
- **Additional link in the journal browse page** directly to the JCR

Dashboard - Journals - Edit Human Performance (0895-9285)

Human Performance (0895-9285)

Publicly visible | Normally visible | Limited - visible to the public | Admin info

Key Information | Publisher Policy | JCR Metrics

2021

Journal Impact Factor: 2.572  
5 Year Journal Impact Factor: 3.209

PSYCHOLOGY APPLIED		
JIF Rank	JIF Quanta	JIF Percentile
4283	Q3	98.9

Journal Citation Indicator: 0.73  
Eigenfactor score: 0.0070  
Normalized Eigenfactor: 0.1023  
Article Influence Score: 0.911

All years

PSYCHOLOGY APPLIED						
Year	JCI	JIF	5 Year JIF	JIF Rank	JIF Quanta	JIF Percentile
2020	0.68	2.423	2.955	5283	Q3	36.747
2019	0.42	1.172	2.112	6784	Q4	20.833
2018	0.5	1.086	1.943	6082	Q3	27.429
2017	0.68	1.528	1.938	6182	Q3	26.22
2016		1.362	1.75	4980	Q3	26.375
2015		0.917	1.628	5479	Q3	32.219
2014		1.273	1.552	3676	Q2	53.289
2013		0.86	1.486	6876	Q4	16.333
2012		0.88	1.359	5473	Q3	26.712
2008		1.159	2.165	3361	Q3	46.721

Cancel Save Save & close

# Two additional smaller improvements

## Archiving/snapshotting Feature

Removed limitation for snapshotting / archiving in the edit page (to attributes present in the edit page).

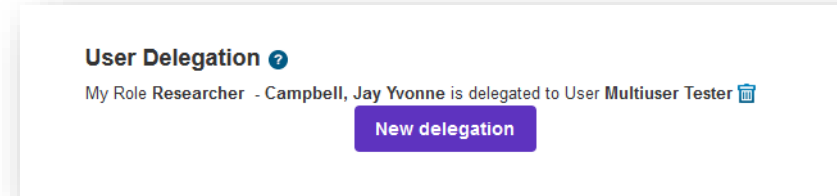
## HR (Human Resources) Integration

Improvements to parsing of unescaped characters and invalid values. In case there are records that have been provided in incorrect format in CSV source files, concerned records will be excluded but other valid records will still get imported.



# On the roadmap for March 2023 - enhancements for delegation management Converis

- **Added start date and end date** for the delegation setting (similar to an out-of-office notification).
- **Added option** for a config admin user **to check for delegations**.
- **Add option to export a list of delegated user roles:** Delegator & delegated role, delegate for the purpose of data maintenance purposes by a system/support administrator.
- **Add option to trigger a confirmation email** upon user delegation to the person delegating, and the person a role is delegated to.



This screenshot shows the 'User Delegation' form. It includes a 'Select user:' field with 'Abendstern, Annabelle' and a search icon. Below this is a note: 'Start date and end date is optional. If it is empty the delegation is unlimited until it will be deleted manually.' There are two date fields: 'Start date:' with '03.09.2022' and 'End date:' with '21.09.2022', both with calendar icons. A purple 'Save' button is at the bottom.

# Also on the roadmap for March 2023

- Enhance **InCites Metrics** to import additional data from InCites API to Converis:
  - SDGs (Sustainable Development Goals)
  - Citation Topics
  - Open Access Status
  
- Move **validation for flexinnumbers** to the client side

2022

2023

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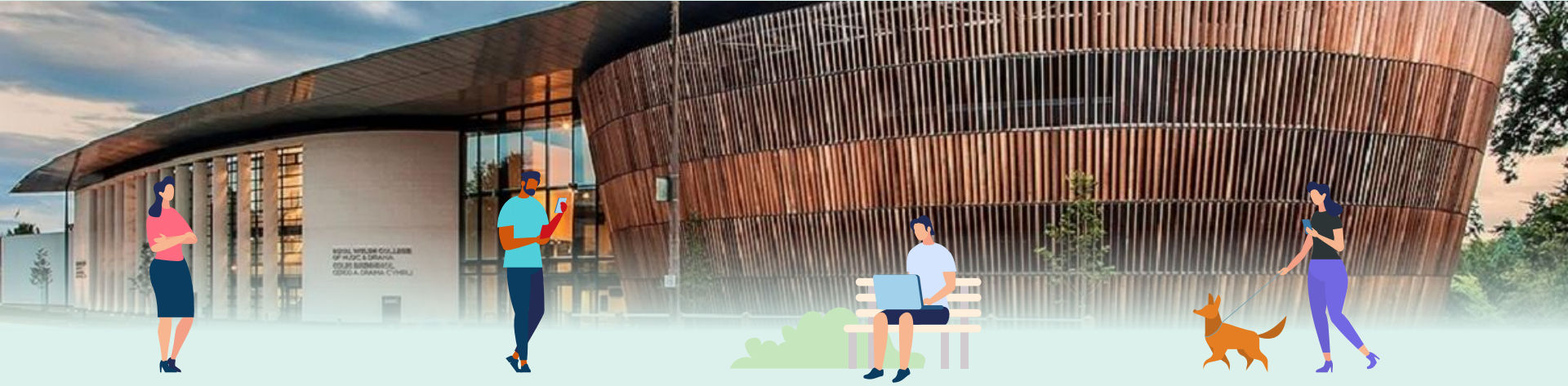
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# Thank you!

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