



Esploro 2024 Roadmap Highlights

Esploro Product Focus Areas



Showcase & Engage

Showcase your institution's experts and their diverse research outputs, activities, projects and more, in a customizable and user-friendly portal. Rich researcher profiles are automatically generated and allow user updates and control.



Analytics

Providing research office staff, repository managers, and institutional stakeholders with valuable insights into institutional data.



Smart Harvesting Framework

The Smart Harvesting Framework leverages machine learning and automated flows to build a Research Information Hub with comprehensive lists of Research Outputs.



Managing the Research Info Hub

The Research Information Hub stores data describing an institution's research endeavors in multiple entities including researchers, research output, & organizational units. We are constantly improving the data, workflows and tools that help manage the Research Information Hub.



Open System

Esploro is an Open System. This means that it facilitates open and easy transfer of information so that Esploro can be integrated with the institution's ecosystem.

2024 Roadmap Highlights



Showcase & Engage

Display aggregated output usage and citation metrics on the researcher profile

Import researcher metrics from Web of Science (h-index and others)

Research Output search enhancements



Analytics

External collaboration report

Add local fields names to Subject Areas

Organizational Units Subject Area

Summary report of Researchers, Departments and the Institution

Top Co-Authors report

Impact Dashboard



Smart Harvesting Framework

Harvesting Datasets from CDI

Automatically add / suggest Research Topics



Managing the Research Info Hub

Add support for Open Access types

Improve research outputs file management

Enrich Research Outputs with Web of Science metadata

Tools for generating Researcher Activities

Additional actions for organization units' management



Open System

Publish Research Output to UnPaywall

Add API support for additional entities

Add new API actions like update and delete

H1

H2

Smart Harvesting improvements

Author matching enhancements



Showcase & Engage

Display Metrics on the Researcher Profile

Aggregated output usage and total Times Cited

Today the citation count and usage count, including the number of Output views in the portal and the number of file views / downloads, display only on the individual Output page.

This development will create an area in the profile for researcher-level metrics and will display aggregated data from all the publications associated with the researcher in Esploro.

Planned metrics include:

- Total Output views
- Total file views / downloads
- Total Times Cited (based on Web of Science count per publication, aggregation of citations of outputs available in Esploro)



Impact:

Provide a better overview of the researcher's work and give it more exposure, all in one place on the profile

Planned Release: **H1**

Import Web of Science Researcher Metrics

Bring in additional researcher information available in Web of Science, including:

- **Researcher Identifiers** - Web of Science ID, ORCID, Pubmed (when available)
- **H-index** - calculated based on Total Times Cited and number of records in the Web of Science Core Collection.
- Additional non-metrics information, such as affiliations, can be added to Esploro Analytics.

Note: The functionality will be available to institutions that subscribe to Web of Science



Showcase & Engage

Impact:

Easily and quickly enrich the researcher profiles via product integrations

Planned Release: **H2**

Research Outputs Search Enhancements

Improve Esploro's Output Search capabilities, by adding abilities such as:

- Support searching by synonyms (not only the exact search term)
- Offer correct spelling
- Improved language detection and special character normalization



Showcase & Engage

Impact:

Improving the search experience in the Esploro portal increases its use as a reliable and accurate research outputs source

Planned Release: **H2**



Analytics

External Collaborations Dashboard

Based on Research Output Analysis

Expanding our existing internal collaboration analysis to provide the institution insight into its network of external research relations.

The analysis will map relations to externally affiliated researchers and institutions, and will allow looking at the institutional, departmental or researcher level.

The analysis is based on the author affiliation that appears on the research output.



Analytics

Impact:

Institutions will be able to quickly analyze their external network of collaborations for research assessment, impact and funding allocations

Planned Release: **H1**

Add Local Field Names to Various Subject Areas

Esploro offers the flexibility of adding additional customer-defined fields for many of the entities that are managed in the system, such as Outputs, Projects and Activities.

Now the Analytics interface will display the locally configured names for each customer and each of the entities.



Analytics

Impact:

Make the Research Output analysis more consistent with the institutional terminology, and easier to create custom reports

Planned Release: **H1**

Organizational Units Subject Area

Based on the recent changes to the Organizational Units' management, additional fields were added to the Organizational Unit entity.

The new subject area will display the additional information available for each unit such as alternate names, descriptions, contact information etc.

In addition, the data will include the hierarchy, to allow to see all the relevant information under the parent unit and not just under the direct organizational unit.



Impact:

Better overview of the organizational structure data available in Esploro

Planned Release: **H1**

Summary Report of Researchers, Departments and Institutions

A new Out of the Box report to provide an overview of the data available in Esploro on different levels:

- Institutional
- Departmental
- Researcher

The report will include data such as entity counts (Outputs, Projects, Grants, and Activities), research topics, % of open access publications, types of research Outputs available, and more.



Analytics

Impact:

Save the admin time when extracting and sharing summarized information with various institutional stakeholders

Planned Release: **H2**

Top Co-authors Report

Identifying the most common co-authors with whom a researcher is working has numerous benefits:

- Expert finder: Help identify researchers from different subject areas working on similar issues and problems
- Increased visibility and impact: Research papers with multiple authors tend to have greater visibility and impact, as they are seen as more authoritative and reliable than those with single authors.
- Help identify potential collaborations, based on researchers working in similar fields and making use of their top collaboration networks. This can lead to new research and funding opportunities.

The report will display the top internal and external co-authors per researcher and highlight these connections based on the strength (frequency) of collaboration.



Impact:

Identify subject matter experts and potential collaborators from various subject areas, and increase your researchers' exposure

Planned Release: **H2**

Impact Dashboard

Create an Out of the Box dashboard to show various research impact metrics all in one place. The report will include metrics such as:

- Total Times Cited
- Media Mentions
- InCites Benchmarking & Analytics metrics
- Usage data such as Output views and file views
- Sustainable Development Goals (SDGs) analysis



Analytics

Impact:

Show your institution's research impact using a variety of available metrics

Planned Release: **H2**



Smart Harvesting Framework

Smart Harvesting Workflow Improvements

"Efficiency Boosters"

A series of improvements to the Smart Harvesting Framework workflow - to the processes and data. Some expected improvements include:

- Additional actions from the Author Matching task list
- Ability to add and view researcher notes relevant to Smart Harvesting/Author Matching
- Improved response times for working with assets with many authors



SHF Workflow Improvements

Impact:

Smart Harvesting Framework jobs will be easier to use, and productivity and overall quality will be boosted

Planned Release: **H1 & H2**

Author Matching Algorithm Enhancements

A series of enhancements to the Author Matching algorithm to improve accuracy of author-researcher matching. Some expected enhancements include:

- Enhanced embedding - improving the algorithm's understanding of the research domain of the researchers and the incoming asset
- Enhanced use of author affiliations



Author Matching Algorithm Enhancements

Impact:

More accurate author-researcher matching and boosted productivity and overall quality

Planned Release: **H1 & H2**

Smart Harvesting: Adding Datasets

Currently Smart Harvesting includes outputs of type publications – now Smart Harvesting will also include datasets from CDI

- Addresses growing importance of making datasets publicly available
- CDI has over 25 million datasets from multiple sources, including DataCite



SH - Adding Data Sets

Impact:

Extending Smart Harvesting to datasets will help build up Researcher Profiles and the Research Information Hub quickly and efficiently, boosting productivity

Planned Release: **H1**

Adding/Suggesting Researcher Research Topics

The Author Matching algorithm detects researchers' and incoming assets' research domains and compares them to decide if there is an author-researcher match and how likely that match is. Researcher research topics can be an additional outcome of the algorithm.

- Suggest research topics in the Researcher Profile for affiliated researchers
- Add research topics automatically to non-affiliated researchers
- Research Topics will be based on a controlled list



Suggesting Research Topics

Impact:

The research topics will help differentiate non-affiliated researchers, and suggested topics will engage researchers and enhance the Researcher Profiles

Boost productivity

Planned Release: **H2**



Managing the Research Info Hub

Adding Support for Open Access Types

Esploro currently has a flag indicating if an article is Open or Closed (Publisher Open Access). We are adding a field for Open Access Status.

- Will be brought in from UnPaywall using the OpenAlex API
- Will bring additional data elements when available - for example, license



Managing the Hub

Impact:

Improved accuracy and support for Open Access

Planned Release: **H1**

Improve Research Output Files Management

Tools for managing research output files are becoming increasingly important as the Research Information Hub expands to include more and more datasets and additional record formats and file types. Esploro plans to add new tools for managing research output files including:

- Supporting load of larger file sizes via the management interface and the Researcher Profile interface
- Ability to replace files
- Ability for the institution to define storage size limits for different groups of researchers



Managing the Hub

Impact:

Ease of use for administrators and researchers

Better support for dataset deposits

Open Access compliance

Planned Release: **H1**

Enrich Research Outputs with Web of Science Metadata

Research Outputs are brought from multiple sources at different points in a record's lifecycle. As a result, research output metadata may be missing important fields like issue, volume and pages. This development will update research output that is already in Esploro with metadata from Web of Science.

- Configuration will be available to control which fields are added

Note: The functionality will be available to institutions that subscribe to Web of Science



Enrich from Web of Science

Impact:

Improved quality of Esploro research output

Planned Release: **H1**

Tools for Generating Researcher Activities

Researcher activities are important for showcasing and measuring a researcher's research activity; activities display in the profile and are available in analytics. Esploro will add tools to facilitate creating activities from data that institutions have.



Tools for Generating Activities

Impact:

Richer activities in the Research Information Hub leading to richer Researcher Profiles and richer reports on researcher activities

Automate workflows

Planned Release: **H2**

Additional Actions for Organization Units Management

An institution's organizational structure constantly changes and evolves, and when it does, the Research Information Hub needs to be updated so that the showcasing and reporting is accurate. Esploro plans to build on the functionality that was added for the Organizational Tree by providing tools and workflows for managing scenarios like:

- Merging organization units
- Splitting organization units



Organizational Unit Management

Impact:

More accurate organizational structure represented in Esploro, using simple update tools

Planned Release: **H2**



Open System

Publish Outputs to Unpaywall

Esploro will enable institutions to publish their research output to Unpaywall. It will be possible to select which research output is published, all output, output that is open, or output with inventory.



Publishing to Unpaywall

Impact:

Improve discoverability of your research output

Planned Release: **H1**

Add APIs for Additional Esploro Entities

Esploro will continue to develop new APIs for entities that are not yet supported and will add actions to existing APIs. This will help facilitate integration between Esploro and other systems including:

- Other Clarivate products
- Research and funding eco-system
- Third party systems



New APIs

Impact:

Enhances Esploro as an Open System

Increases ability to integrate Esploro with the institution's eco-system

Planned Release: H1 & H2



Thank You

Esploro Product Team

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