Summon and CDI 2025 Roadmap

Discovery Product Team

Session Agenda

- 2025 Roadmap
- February Release Highlights

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2025 Release Dates for Summon and 360/Intota

Quarterly Release Date	Preview Release Date
February 5, 2025	January 22, 2025
May 7, 2025	April 23, 2025
August 6, 2025	July 23, 2025
November 5, 2025	October 22, 2025

- Summon and 360/Intota have the same quarterly release dates unless otherwise announced
- Summon maintenance releases occur on the first Wednesday of all other months
- There are no preview environments for maintenance releases

Strategic Focus Areas for 2025

User Experience & Confidence

H1 & H2 2025

Library Empowerment

H1 & H2 2025

Search & CDI Excellence

H1 & H2 2025

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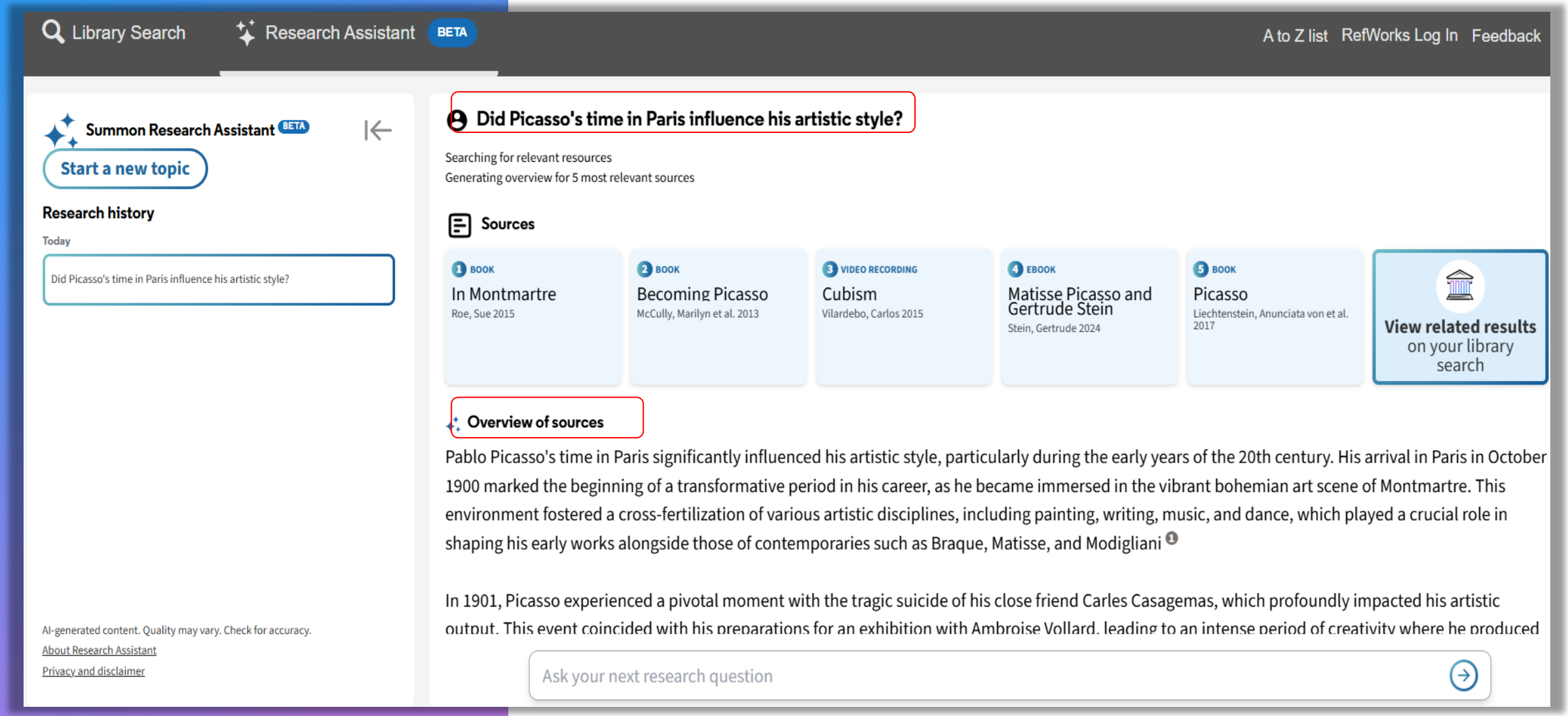
User Experience and Confidence

2025 Roadmap Highlights

- Summon Research Assistant
- Integration with Rapido ILL
- Leave end date open in facet — CERV
- Omit non-local LibGuides from expanded searches — CERV
- Display series volume in brief results — CERV
- Accessibility

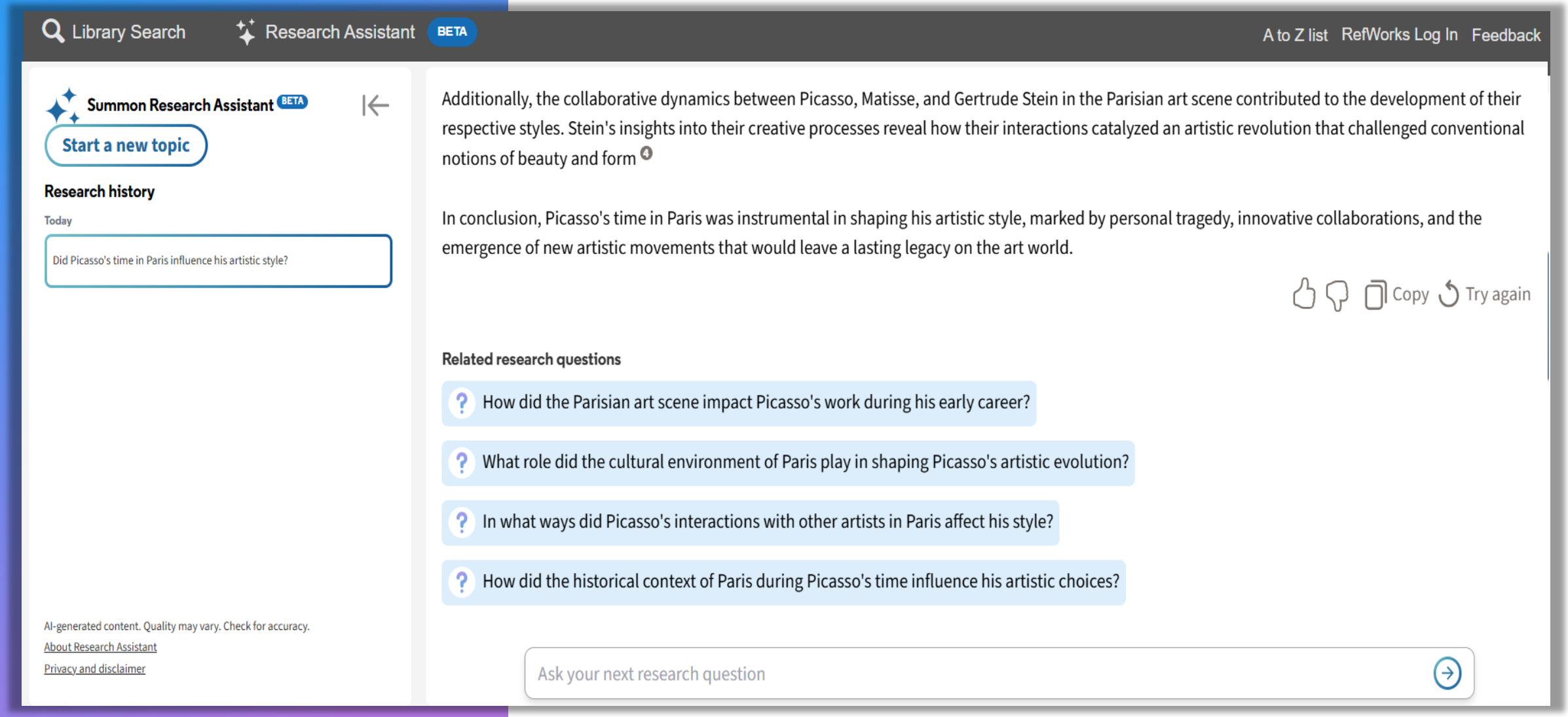
Summon Research Assistant

2025 H1



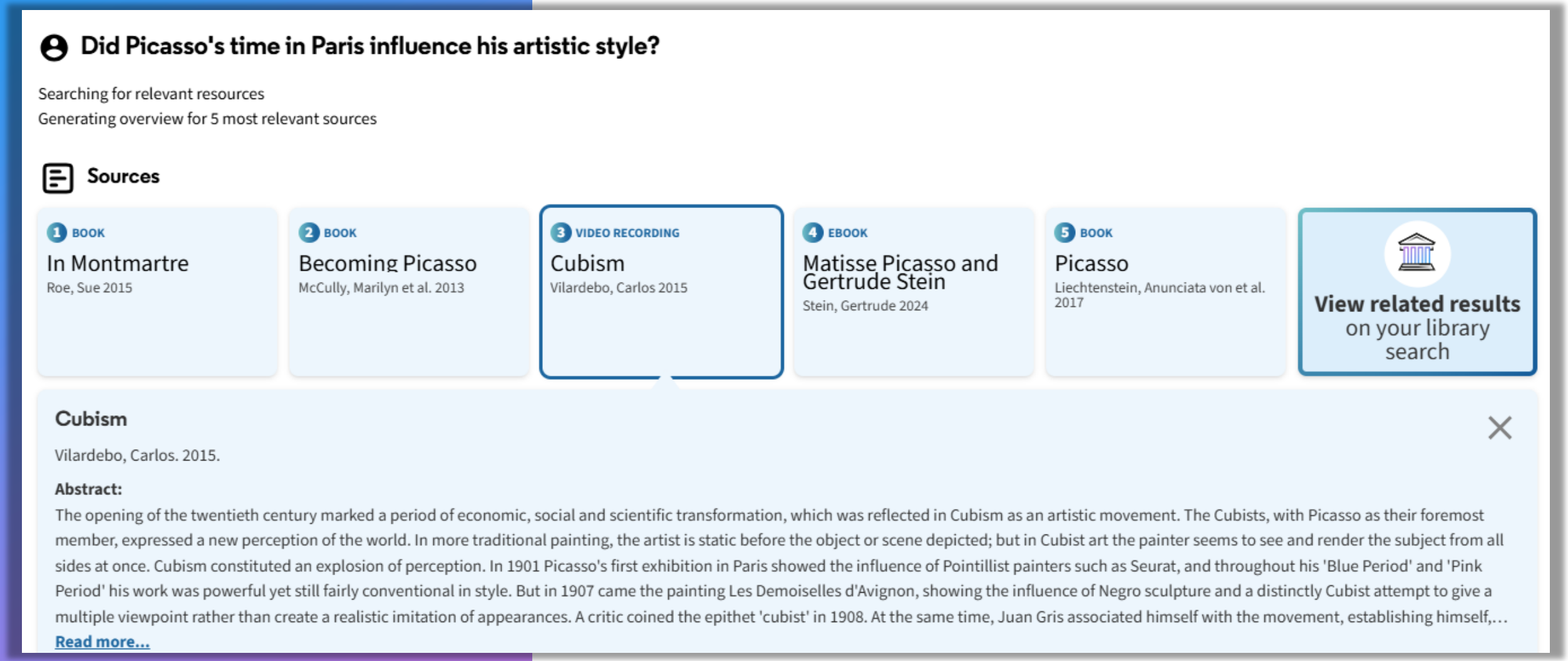
Summon Research Assistant

2025 H1



Summon Research Assistant

2025 H1



Summon Research Assistant: Things to Know

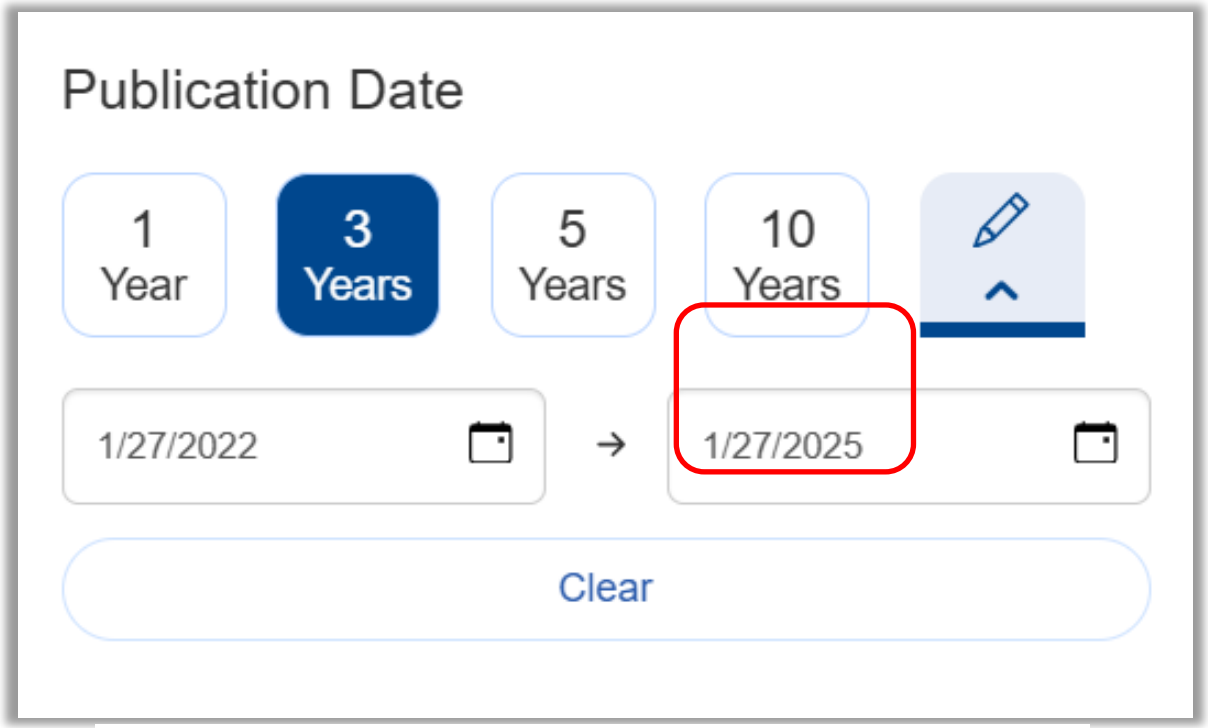
- Available in the **March 5, 2025** release (there is no Preview release for the month)
- Optional: can be enabled/disabled in both Preview and Production at any time
- No cost to libraries, no change to terms of use or contracts
- Users can authenticate via social platforms or SAML, or as an IP-authenticated “guest” user
- Individual and aggregate guest user search thresholds will apply
- FAQs and documentation in progress

Summon Integration with Rapido

2025 H1

- Resource sharing option in the Library Open Platform
- Extend the breadth of content available to researchers via ILL and document delivery
- Launching projects with Summon/360 sites worldwide for requesting articles and book chapters
- Scoping out additional work for H2 that will integrate Summon with the Global Title Index for physical material requests

Leave End Date Open in Facet



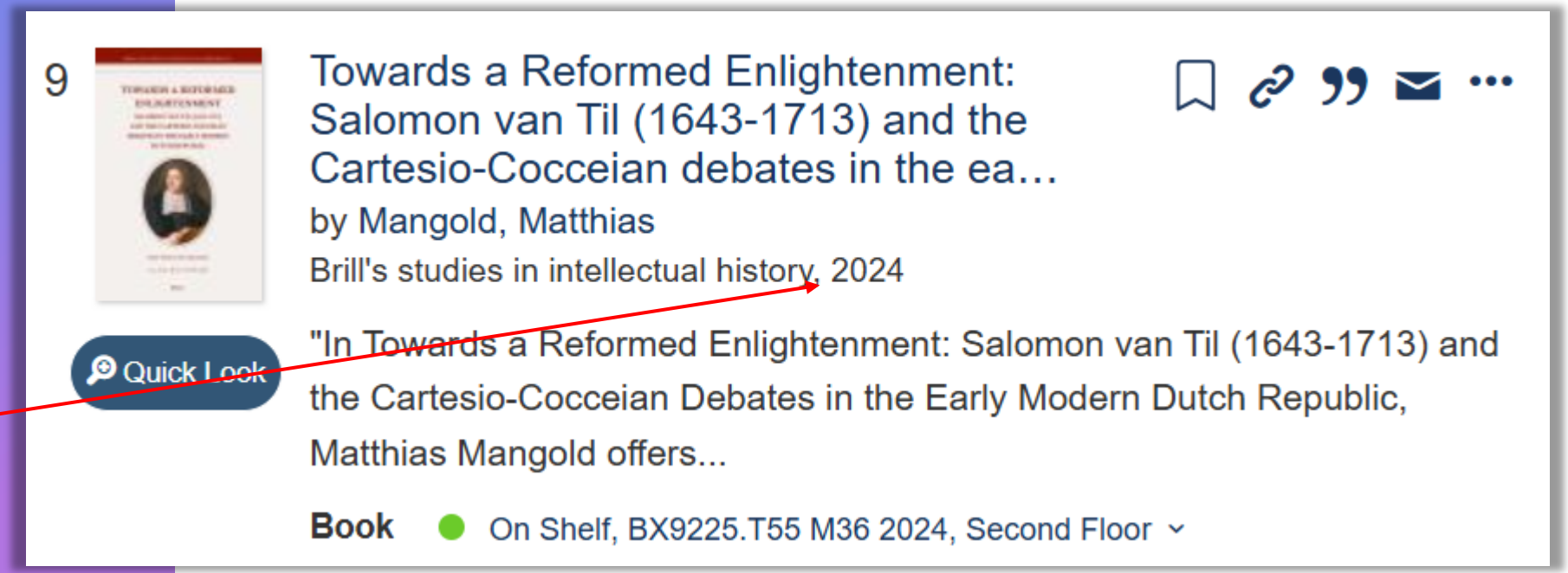
- Give users access to more content
- End date now defaults to today unless you edit it
- Some content doesn't have an assigned end date and thus isn't returned now

Omit Other Libraries' LibGuides

- Eliminate confusion for users
- Exclude other libraries' LibGuides when the "Add results beyond your library's collection" option is selected

2025 H1

Display Series Volume in Brief Results



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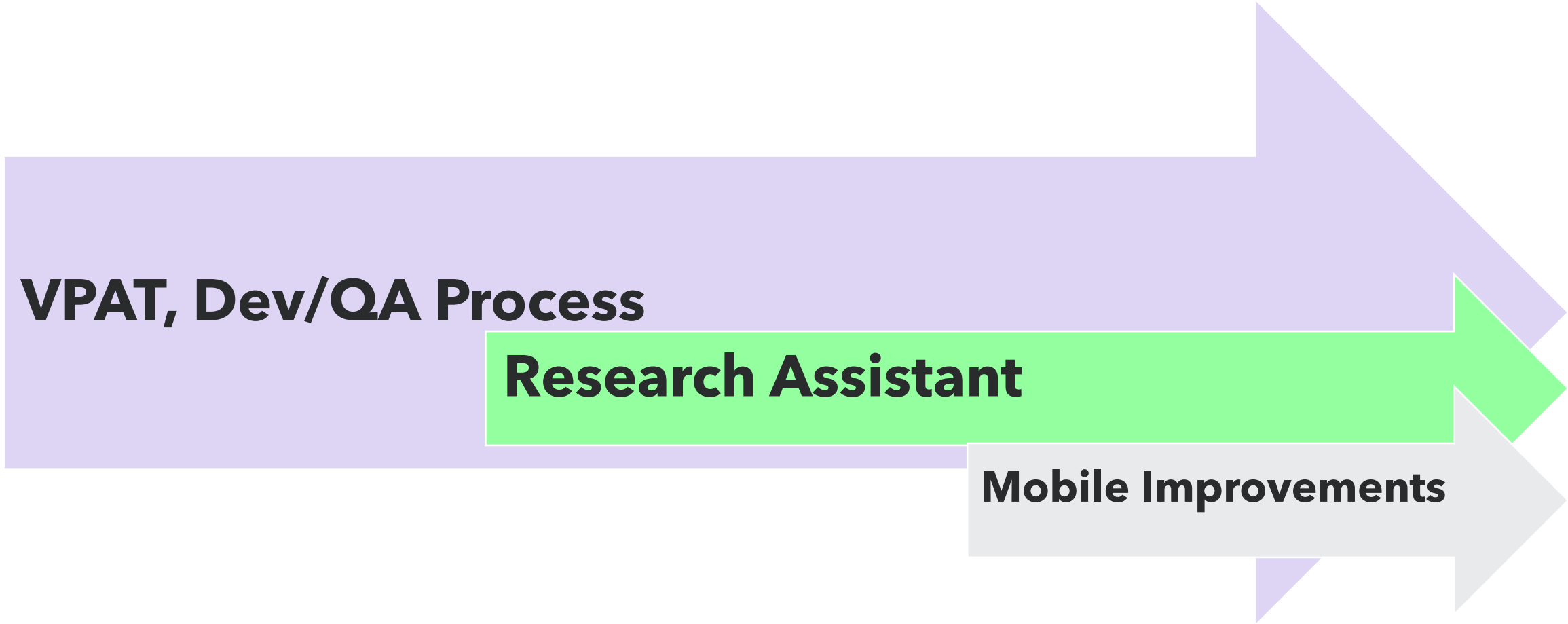
Accessibility: Essential Design Elements



Library Empowerment

2025 Roadmap Highlights

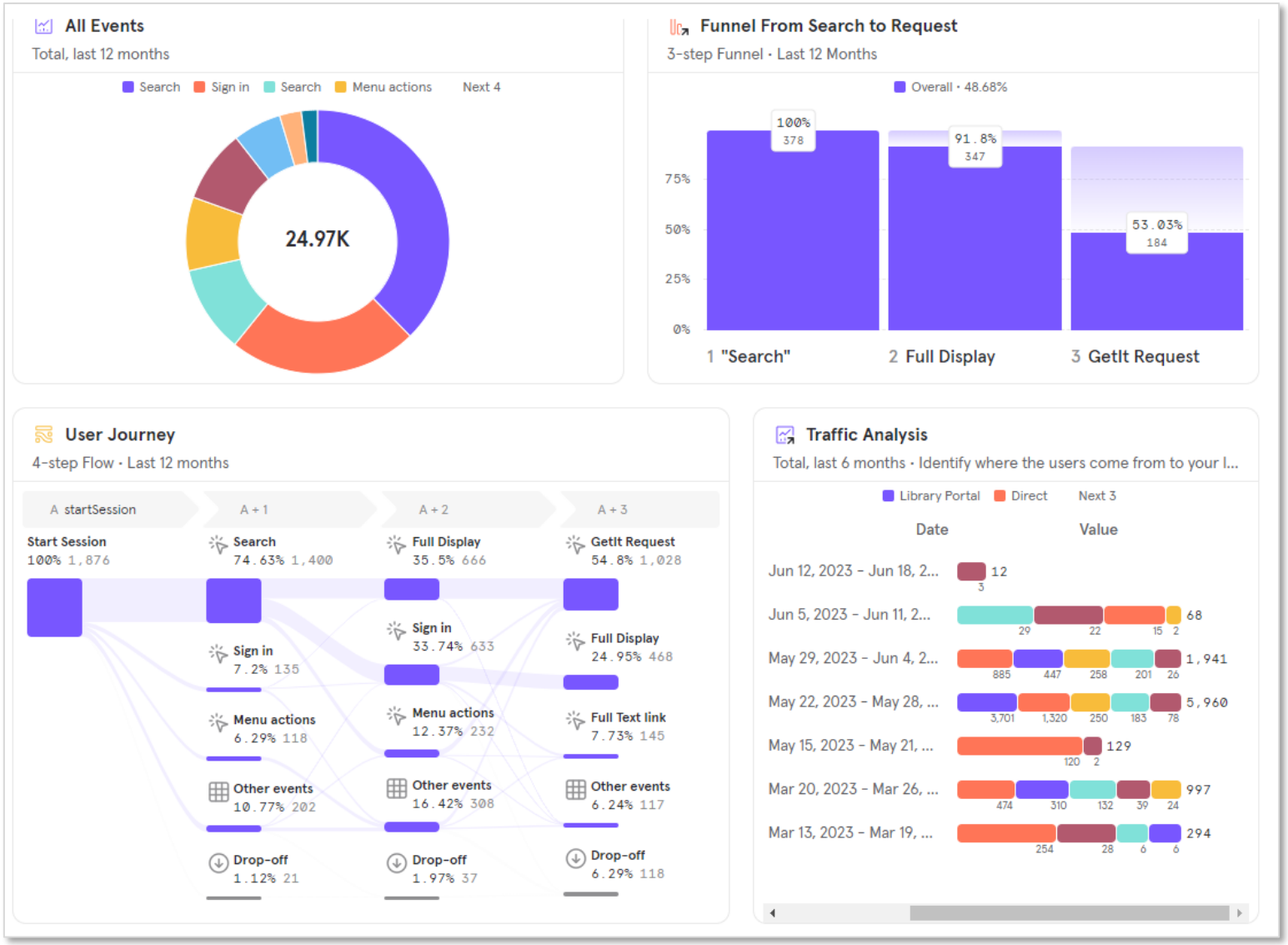
- Mixpanel for user engagement analytics
- Search for Summon Admin Console options — CERV
- Customize the Summon splash page — CERV
- Add more links to the hamburger menu — CERV
- Customization options in EJP public notes — CERV

Mixpanel Analytics

2025 H2 -2026

Improve and increase user engagement with the right analytics

- Get to know your users better
- Go beyond basic data collection and reports
- Generate insights and smart recommendations
  - Analyze user journey to improve user experience
  - Identify drop-offs in user behavior to increase success metrics



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Powered by mixpanel

2025 H2

Customize the Summon Splash Page

- Issue: the Summon splash page has unused white space
- Idea: Provide a framework for admins to easily add local content, the carousel, notifications, events, etc.

2025 H2

Search for Summon Admin Console Options

- Issue: the number of configuration options available to admins can make it difficult to locate what you're looking for
- Idea: add a search option for specifically for finding the necessary option

Add More Links to the Hamburger Menu

- Let admins configure more than one custom link in the menu

Search & CDI Excellence

2025 Roadmap Highlights

- Incorporate Document Insights for researchers
- Implement new rules for identifying book reviews — CERV
- Add a new secondary type for “online first” content — CERV
- Refactor complex subject heading handling

2025 H2

Incorporate Document Insights

- Customers that are subscribed to relevant ProQuest collections will see an icon in Summon brief results
- Indicates availability of insights and key takeaways of the document accessible via the Quicklink to platform
- Researchers can make quick decisions about relevance based on the summarization
- Powered by the ProQuest Research Assistant

2025 H1

New Book Review Identification Rules

- Issue: Current content ingestion rules can better distinguish “book” from “book review” content
- 2024 analysis helped pinpoint specific ingestion rules that can be implemented
- Result: less user frustration due to mislabeling of content

New Secondary Content Type for “Online First”

2025 H2

- Some publishers post articles on their websites as “online first", et al., before those articles have been assigned to specific issues
- Advance online publications do not have volume, issue, or page numbers
- Issue: Articles are returned as available but may not be accessed on an aggregator platform due to lack of enumeration
- Idea: Add a visual cue “Online First” to articles that have been published in the last 6 months where all participants’ records lack enumeration

Refactor Complex Subject Heading Handling

2025 H2

- Based on feedback from the community
- Issue: complex subject headings with non-authorized subdivisions are split up, not treated as a fully authorized subject heading
- Researchers can’t search & filter their search as narrowly as they want due to dropped subdivision
- Resolution: ensure that fully authorized headings are searchable, display, and used as filters rather than removing subdivisions from normalization

February Snapshot

- SAML timeout after 15 minutes was extended to 24 hours to support researcher workflows better.
- Chat Widget will now send all emails from noreply@clarivate.com so that the DKIM, DMARC and SPF protocols are properly supported.
- Content Ingestion Report emails:
  - Changed the From address to noreply@clarivate.com.
  - Fixed the use case causing a few emails to contain only the
 HTML element.
- Bulk Export email now correctly displays CJK.
- Impacted Sierra and Koha libraries will no longer experience delayed real-time availability displays on the details page.
- Records whose only rights source is a print-format Library Specific Holdings database will display a Check Availability status instead of Full Text Online.
- New linker updates for Elsevier databases (ScienceDirect, ClinicalKey, ClinicalKey Nursing, Health, Masson Premium) [360 Link].

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Thank You

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