

Shlomi Kringel | Corporate VP, Discovery & Delivery Solutions Yuval Kiselstein | Director of Product Management





Highlights Since Last IGeLU

2

Product Strategy & Roadmap

3

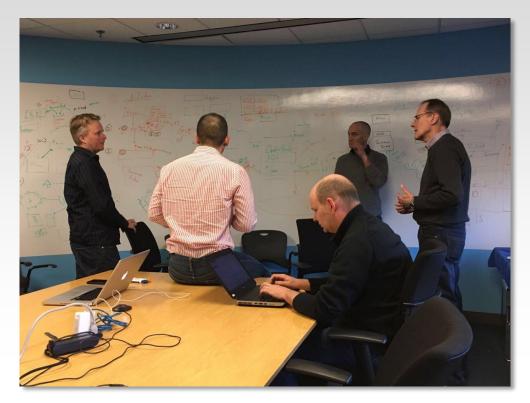
The Reading List Momentum

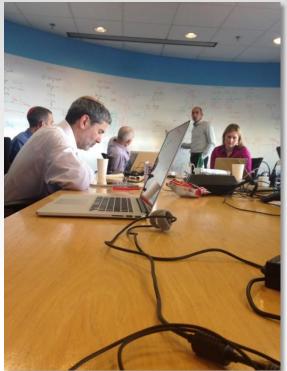
Once Competitors...



http://callejerorev.com/category/columnas-y-ensayos/historia-opinion-critica-y-analisis/

...Now Friends





Since Last IGeLU: Discovery and Delivery At-a-Glance



A comprehensive product portfolio



> 1,000 Primo customers in the cloud



Increased usage

>6.5 million searches per day (+40% from 2015)



A growing customer community

>3,200 discovery institutions



Continuous community collaboration

Developer Days Summon working group NERS enhancements Idea Exchange



A wealth of quality resources

>1.3 billion records >90 content types



Constant product innovation

Quarterly releases: Primo, Summon, 360 Link, SFX













Community Collaboration...



Since Last IGeLU: New and Enhanced Product Capabilities



- New UI
- Primo Analytics
- Digital collections
- Enhanced personalization
- Exploration: Citation trail



- New & enhanced KB management tools
- Improved linking to EBSCO via API
- New infrastructure with new DB system



- Altmetric embedded in results
- Integration with RefWorks
- Refreshed results page
- Chat widget builder



- Redesign, including Sidebar and new UI
- Integrations with Ulrich's, Syndetics, Altmetrics, IEDL
- New EJP/AtoZ list and citation linker

Since Last IGeLU: Support, Performance and Product Quality









Reduction in system-down cases

Decrease in support backlog

Performance & scalability improvements

Quarterly releases

Continuously enhancing:



Release roll-out



Delivery & training

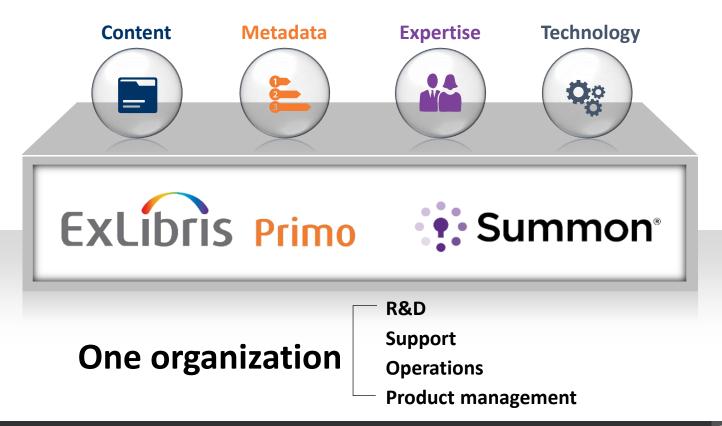


Ongoing indexing

Summon and Primo continue to be our flagship discovery products



Leveraging Synergies



Summon and Primo Strategy Essentials



Leverage innovative cross-product capabilities

- Shared and enriched content
- Enhanced services—for example:
 - Primo → Summon: Personalization, article recommendations (bX)
 - Summon → Primo: Topic search, database recommender
- Summon integrated with Alma



Introduce new & enhanced capabilities

- Data-driven services for exploration
- Controlled vocabulary



Share and optimize common processes

- Status page
- Customer knowledge center
- Developer Network
- Idea exchange





Discovery Product Strategy & Roadmap

Discovery Product Strategy



Broad & Rich Content

- Shared content
- Relevance ranking
- Content enrichment
- Content neutrality



User Experience

- Exploration & learning
- Patron-integrated services
- Mobility



Library Empowerment

- Workflow efficiency
- Exposure of collections & expert services
- Analytics-driven optimization
- Customization



Discovery in Context

- Personalization
- Discovery via multiple entry points
- Extension of discovery to research and teaching & learning



Moving to a Shared, Comprehensive Content





Shared electronic collections

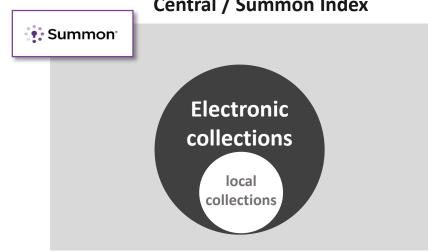


Unified content ingestion process



Loading of existing content and data enrichment to Primo Central / Summon Index





No change to the method of managing local collections in Primo and Summon

>90 Content types

>4,000 Databases

>1.3 B records



Enhanced Content Coverage

Shared Content: Leverage Summon and Primo Indexes

- More data sources
- Metadata Librarian team
- Enriched data (e.g. Ulrich's)
- Granular resource types

 (e.g. journal article vs. magazine

 article vs. trade publication article)

Collection Examples

Vandenhoeck & Ruprecht: Journals and ebooks

Knovel Corporation: ebooks

American Medical Association: Journals

ACM Digital Library: Conference proceedings, journals

Al Manhal FZ: Journals, books, dissertations

Key Note: Market Research reports

Brill: ebooks and journals CRC Press

Australian National Data Service: Research from

Australian research organizations

Chinese Academy of Social Sciences (CASS): Chinese

Academy of Social Sciences research

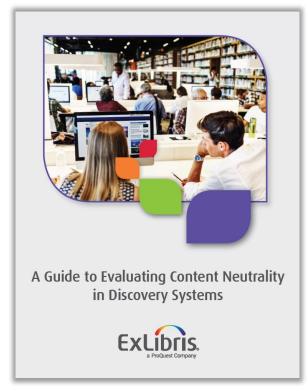
Defense Technical Information Center: DTIC Technical

Reports



Unbiased Discovery: Proven Content Neutrality





http://www.resources.exlibrisgroup.com/evaluating-content-neutrality-in-discovery-systems



Separate platforms for content and discovery



Merging and grouping of records to prevent bias towards specific providers

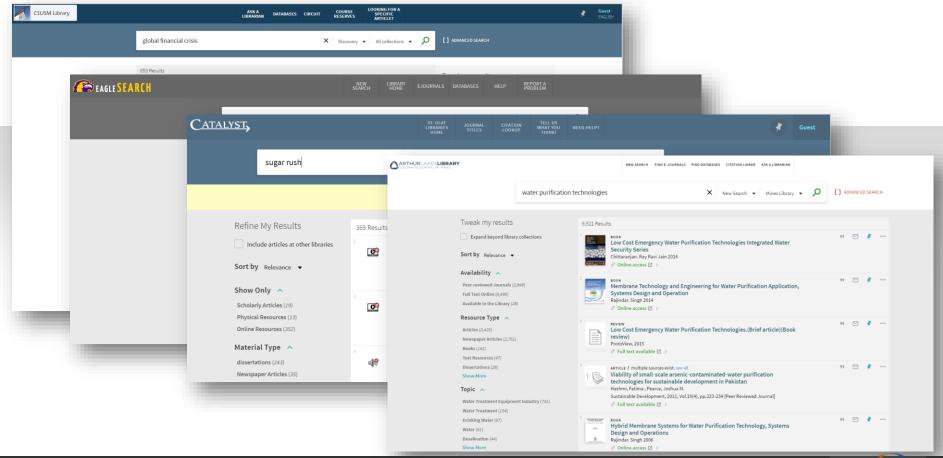


Delivery method according to library-defined linking priority



New Primo User Interface is Live!





Exploration through Data-driven Services









Data-Driven Services:

Leveraging data from multiple sources to create an enhanced discovery experience, providing users with:









Summon Integration with Alma



Benefit from Alma next-gen resource management with your existing Summon solution!







End-to-end resource delivery & fulfilment



Integrated and advanced patron services

Available to customers by end of 2016



Alma-Primo Workflow Optimization Initiative



Simplifying & expediting Primo back office processes by leveraging Alma admin capabilities





Single back office management

Key enhancements:

Elimination of duplicated efforts & processes



Simplified publishing / loading processes



Simplified configuration & setup

Initial work with development partners started



Discovery Product Strategy



Discovery Product Strategy



Primo Search and Find – Highlights

Priority Setting 🕸

Search log analysis, customer feedback, Ranking Advisory Group, user studies

Status 👏

General

- Methodology change for more flexibility in document boost
- Adjustment in date and resource type boosts, fit to query (e.g. short topic queries)
- Improvements in international searches

User experience

- Resource type changes for consistency in facets and display
- UI notification when expanding query for stemming and expansion to full text in case of very few results
- Adjustments to Boolean searches

Primo Search and Find – Highlights

Just released 👏

Mixed result list for ambiguous 1-3 word topic searches

- One reference entry on top (if there is at least one)
- Two items that are of a more general nature
- Up to seven specialized articles with a strong boost for more recent dates
- Local results are blended in as before

Coming Next

- Further improve mixed result list
- Enhance the full text searches and search expansion
- Increase glanceability and linking for Primo Central preferred records in a group
- Review the handling of synonyms

Summon Relevance – Highlights

Controlled Vocabulary Boost 🥸

Use case analysis and A/B testing for Controlled Vocabulary and Subject Term Boost

Status 👏

General

- Tested adjustments for Subject Term and Controlled Vocabulary boosts
- Validated effectiveness of current settings

Coming Next

- Improved Subject Term highlighting and better faceting in the UI
- Query Expansion improvements for Controlled Vocabulary and Subject Terms
- Citation Query improvements

Discovery Product Strategy



Exploration through Data-based Services



Web of Science - Web of Science (a.k.a. Web of Knowledge): Provides citations covering over 10,000 high-impact journals in the sciences, social sciences, and arts and humanities, as well as international

ERIC (ProQuest) - The ERIC (Education Resources Information Center) database is sponsored by the

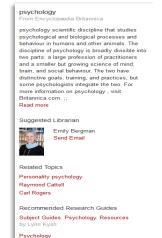
U.S. Department of Education to provide extensive access to education literature to augment American education by increasing and facilitating the use of educational research and information to improve

Management Add results beyond your library's collection



Topic Exploration

LibGuide Recommender



Article Recommender (bX)



bX Users interested in this article also expressed an interest in the following:



About b

8,401,511 results sorted by relevance - -

Database Recommendations

proceedings coverage for over 120,000 conferences

experimental psychology

nhysiological psychology

by Experimental Psychology Society

practice in learning, teaching, educational decision-making, and research.

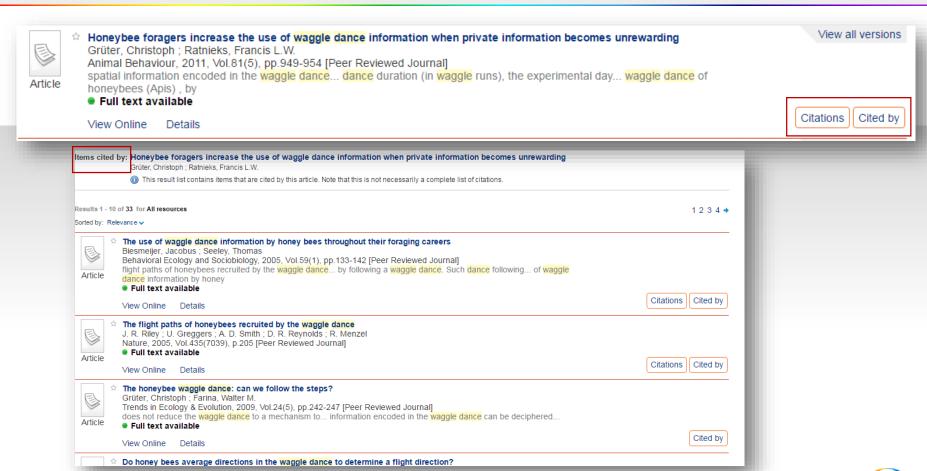
Journal: JRNLSTACKS, BF180 .Q8, DOHENY (+1 more)

1. The Quarterly journal of experimental psychology. A, Human

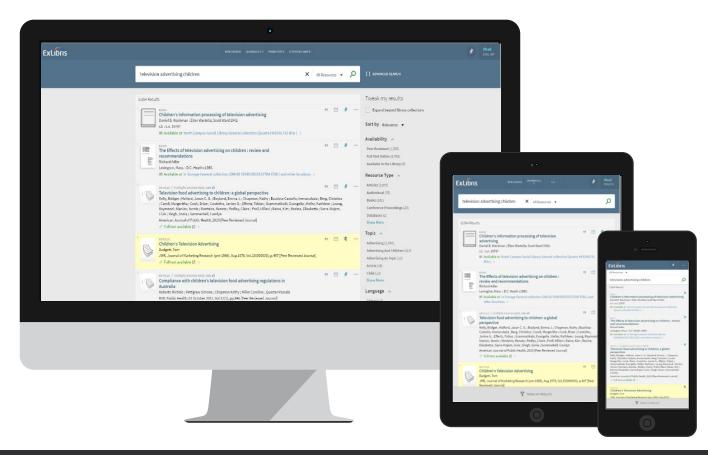
The Quarterly journal of experimental psychology, A, Human experimental psychology, 1981

2. The Quarterly journal of experimental psychology. B, Comparative and

Citation Trail – New Exploration Paths

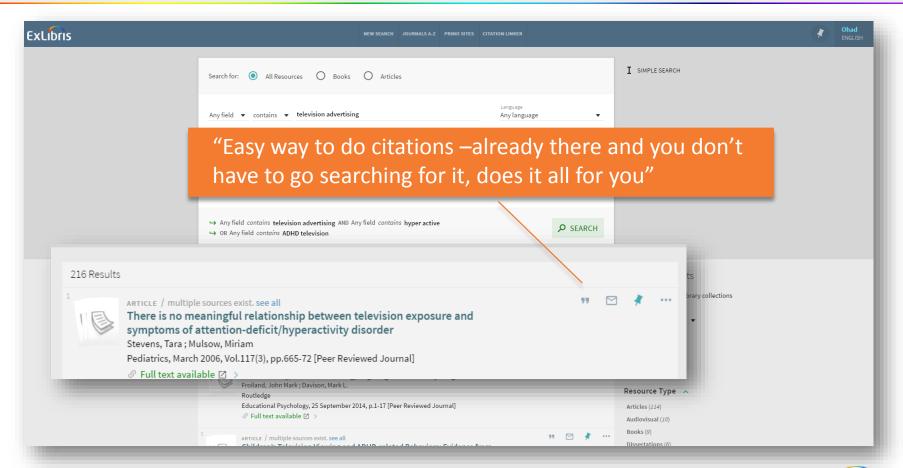


New Primo User Interface

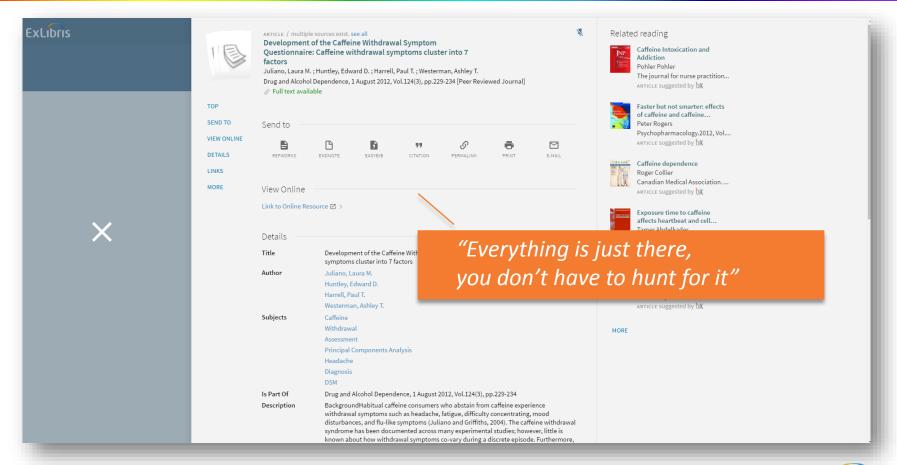




New Primo User Interface

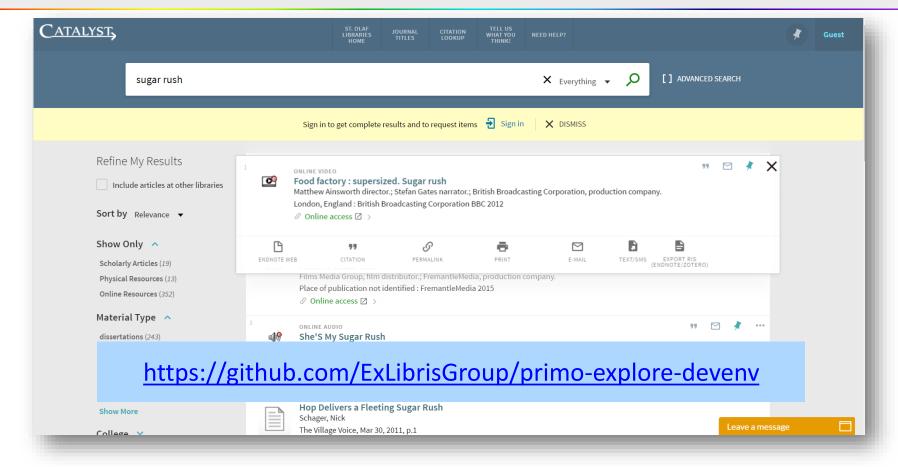


New Primo User Interface





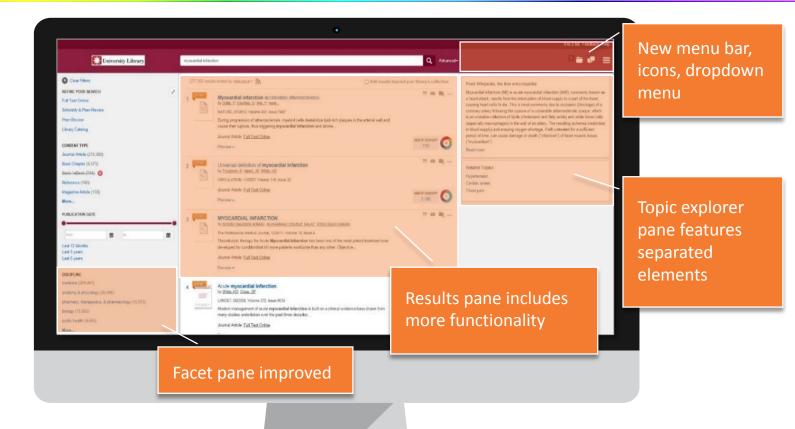
New Primo User Interface – Customization





Summon Roadmap: Revised Results and Home Page

- Improve
 usability and
 responsive
 behavior
 through
 enhanced &
 refreshed
 design
- Meet customer's requests



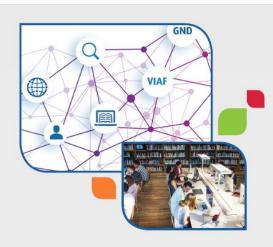
Linked Data in Discovery



Enhance patron discovery, connecting between the new Primo UI and external LD sources



Expose end users to related information based on URIs stored with the metadata



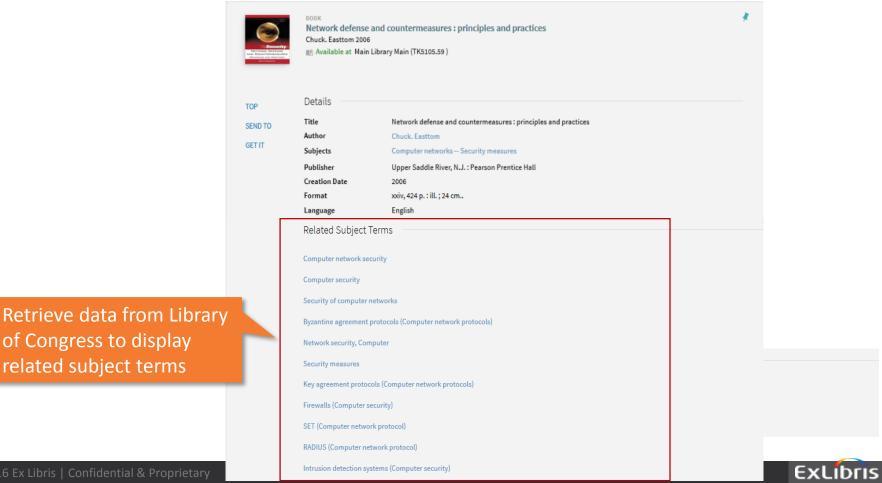


Putting Linked Data at the Service of Libraries

The Ex Libris Vision and Roadmap

http://www.resources.exlibrisgroup.com
/linked-data-service-libraries/

Enhanced Patron Services – Example

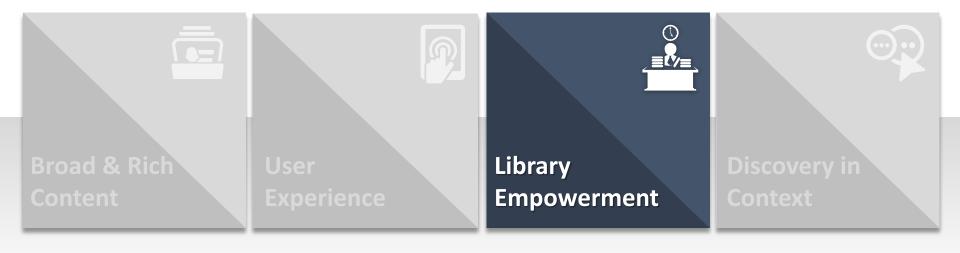


© 2016 Ex Libris | Confidential & Proprietary

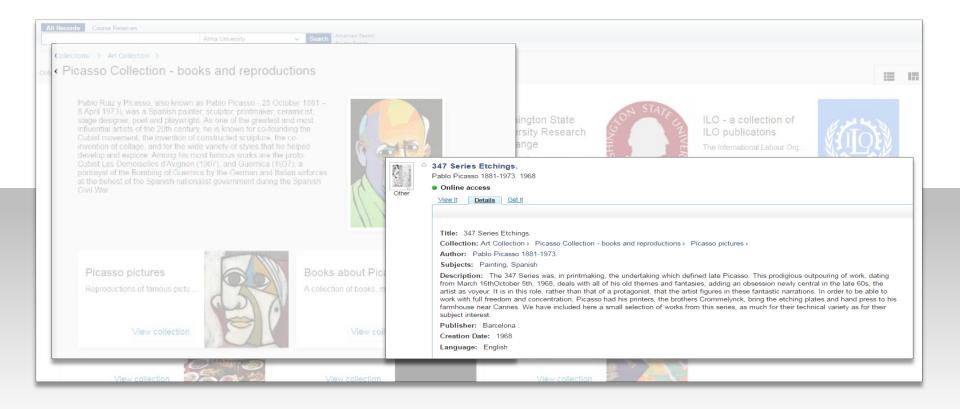
of Congress to display

related subject terms

Discovery Product Strategy



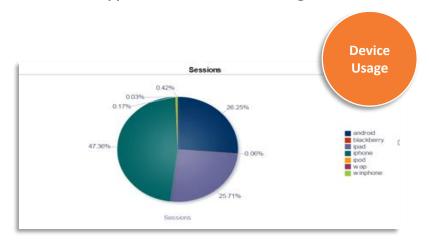
Released in 2016: Digital Collection Navigation

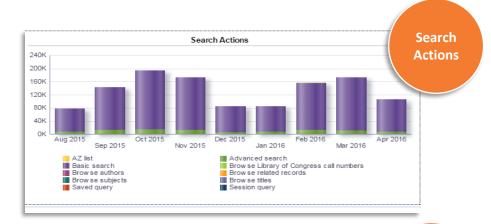


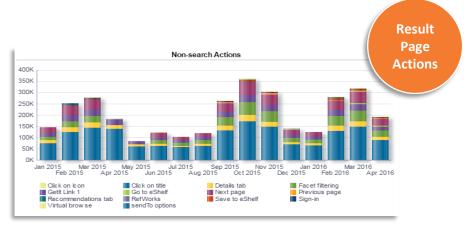
Primo Analytics for Continuous Optimization

Make data-driven decisions:

- User interface options and layout
- Collections development
- Results boosting
- Facet types, order and sorting









Primo Roadmap: Analytics

Extend Primo analytics capabilities:

- Alma & Primo combined reports
- New subject area –journal usage
- Additional data elements: Referrer, user group
- Consortia support

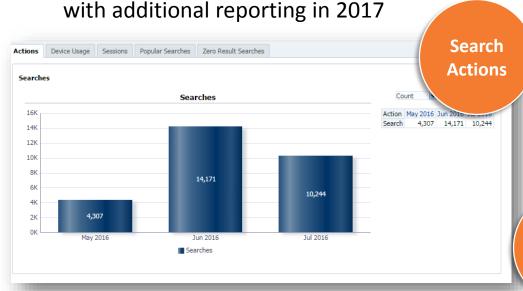


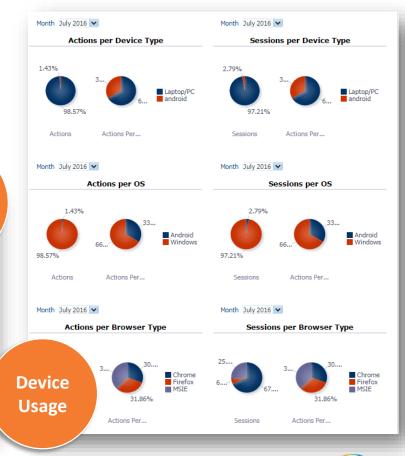
PRIMO ANALYTICS

Roadmap: Summon Analytic – OBI Implementation

- Replace Urchin reporting with OBI
 - Leverage learnings of Primo and Alma
 - Create foundation for expanding beyond current reporting

• Initial release planned for Dec. 2016





Platform Openness

REST APIs for Search & eShelf

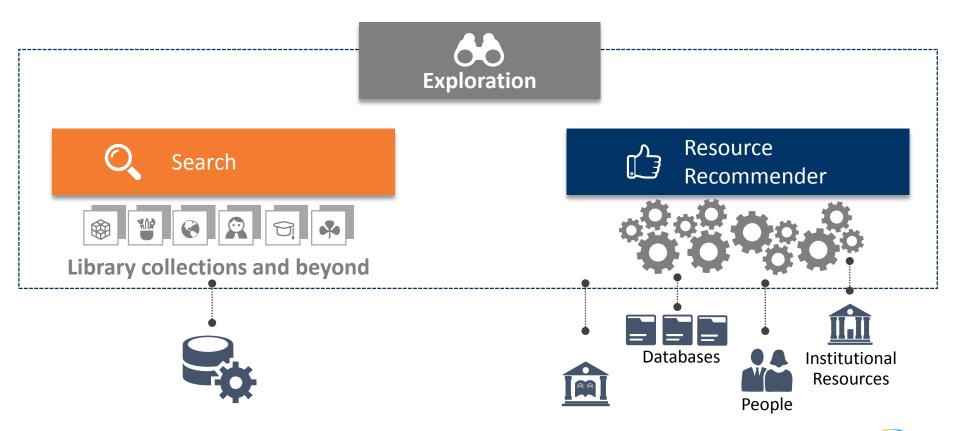
- Customers can easily develop extensions and services for Primo
- APIs are in RESTful standard for fast and slim response
- Response in JSON format and list of URI as part of the search results
- Addition of faceting by Content Provider and by Collections to the Summon API

Coming Next:

- Additional services with REST expose APIs used by new UI
- Linked data
- Improved documentation and support for the Summon API



Roadmap: Resource Recommender – Discovery as a Gateway

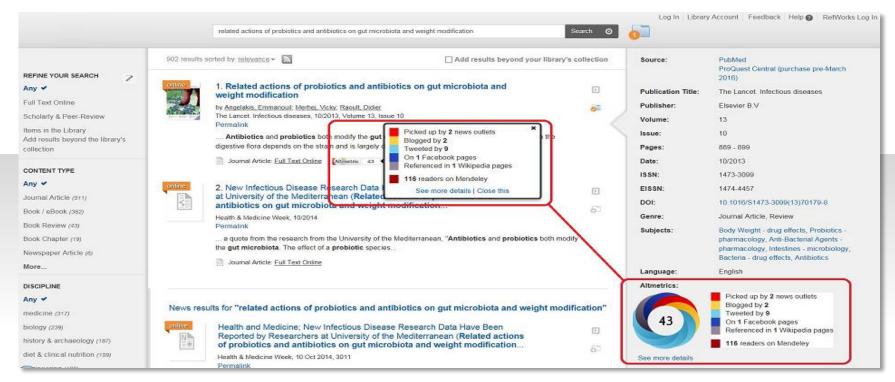


Discovery Product Strategy



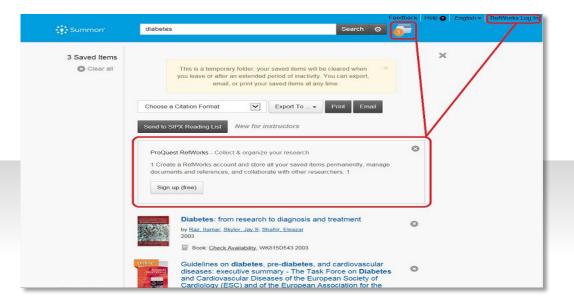
Last Year – Summon Discovery in Context

Altmetrics Integration



Last Year – Summon Discovery in Context

- Saved Items Folder Improvements
 - Move from Flow to New RefWorks
 - Improvements to the following styles:
 - Harvard
 - APA
 - MLA
 - AGLC3
 - Oxford



Discovery as a Gateway



Integration with teaching and learning tools

Primo – Leganto integration

- Instructors can:
 - Search in Primo via the Leganto interface
 - Export Primo eShelf content to Leganto



Integration with researches tools

- Primo RefWorks integration
 - Search in Primo via the RefWorks interface
 - Use RefWorks as central eShelf



And there is much more to come.....



Enhanced User Experience



Enhanced Primo Central Content



Library Empowerment



Discovery in Context



















Leganto Reading List Solution







Bridging the gap between instructors, librarians, and students, and helping institutions boost student engagement, foster meaningful learning, and maximize the use of library collections

22 Customers in 9 Countries

Imperial College London





Kingston University London

































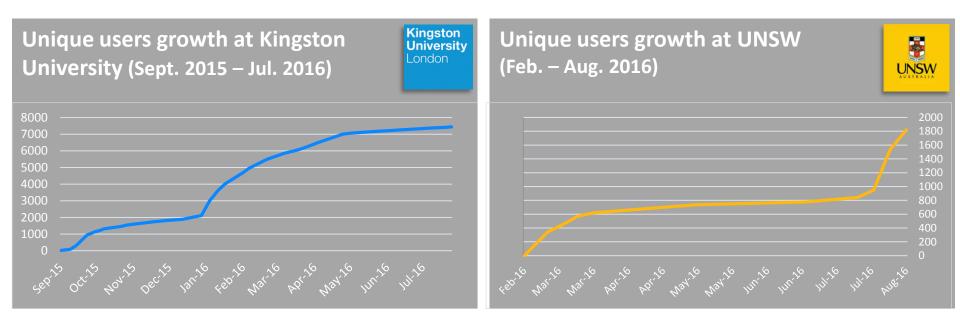








Leganto in Action: Extensive Usage by Instructors and Students



- Implementation started with a pilot group
- Usage increases over time, as more instructors come on board

Roadmap Highlights



Analytics and reports for the library and the instructor



Cross-system copyright clearance workflows



Automated triggering of Alma workflows



Support of reference managers as sources for materials



Notifications for students



campusM mobile app



Additional types of recommendations



Join Us to Learn More!

- Summon Product Update
 Brent Cook, Monday 14:30
- Primo: A New User Experience Christine Stohn, Miri Botzer, Monday 15:00
- Linked Data Collaboration Group
 Josh Weisman, Asaf Kline, Yuval Kiselstein, Monday 16:30
- SFX Product Update Christine Stohn, Tuesday 15:00, Cosmos3CD
- Leganto Product Update Gal Darom, Tuesday 15:00, Cosmos1A
- **❖ 360 Product Update**Eddie Neuwirth, Tuesday 15:00, Space2
- The ProQuest and Ex Libris Unified Content Approach and How It Will Benefit your Users

 Christine Stohn, Eddie Neuwirth, Tuesday 17:30, Cosmos3CD
- Leganto: Extending the Role of the Library to Teaching and Learning Tamar Sadeh, Tuesday 18:00, LivingRoom4





