

Summon Product Update

Roadmap and Q&A

Brent D. Cook, Director, Product Management,
Summon

Agenda

- **Review of Product and Content Updates**
- **2017 Roadmap Review**





Review of Product and Content Updates



Product Enhancements and New Functionality



Query Expansion using LCSH



Subject Term Boost for Relevance



Results Page Refresh



Resource Recommender Improvements

- Over 47,000 databases now available for recommendation



Topic Explorer Improvements

- Addition of JapanKnowledge and World Book as content sources
- Improved content processing
- Better Handling of longer phrases and increased matching



API Enhancements

- Faceting by Content Provider and Database



Launch of Preview Environment



And many more improvements

Strategic and Continuous Content Growth

> 2.9 Billion items - Hundreds of Updates

New & Updated Content *Recent Highlights*

Commercial Content Providers

- American Psychiatric Publishing
- Oxford University Press - Very Short Introductions and multiple collections
- CAIRN – Journals
- ProQuest - History Vault collections
- McGraw-Hill – Access Science and multiple collections
- SAGE - Knowledge Business Cases, Video and multiple collections
- PierOnline –eBooks (Japanese)
- Central and Eastern European Online Library (CEEOL) – Books and Journals
- Cambridge University Press - Ben Johnson Online and multiple collections
- Medical*Online – (Japanese books)
- NBD Biblion Uittrekselbank (Dutch)
- Verlag C.H. Beck – (German books)

- Gale – National Geographic, Business Insights, and Multiple Collections
- Henry Stewart Talks – Journals
- Edward Elgar Publishing Ltd - Reference Books

Open Access & Open Educational Resources

- U.S. Department of Energy- OSTI SciTech Connect
- Parliamentary Library, Australia
- Exeley, Inc. – Open Access Journals
- OpenStax ebooks
- OpenSUNY Textbooks
- Open Textbook Library
- London Southbank Institute Open Research
- World Bank Open Knowledge Repository
- German National Library of Economics – EconStor
- Cognitive Sciences ePrint Archive
- 1Science - OAFinder

2017 Roadmap Review



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
- 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

February
2017

MAY RELEASE

- May 3rd – Release launch date

May
2017

JULY RELEASE

- July 26rd –
Release launch date

July
2017

NOVEMBER RELEASE

- November 15th –
Release launch date

November
2017

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

FEBRUARY RELEASE

- February 1st

MAY RELEASE

- May 3rd

JULY RELEASE

July 26rd

NOVEMBER RELEASE

- November 15th

**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

**July
2017**

- UI Improvements
- Controlled Vocab: Subject terms in the UI
- Course Reserves

**November
2017**

- Scholar Profiles
- Search within a Journal
- Availability for API
- Topics for API

Roadmap items 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



Increased Frequency of Rights



Sort by Date issue



Increase available results from 200 to 1,000





May Release





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 University Library search interface. The search term 'Narwhal Diet' is entered in the search bar. The results are sorted by relevance, showing 2,294 results. The left sidebar contains filters for 'REFINE YOUR SEARCH' (Full Text Online, Scholarly & Peer-Review, Open Access), 'CONTENT TYPE' (Book / eBook, Journal Article, Newspaper Article, Dissertation/Thesis, Book Review), 'PUBLICATION DATE' (Last 12 Months, Last 3 years, Last 5 years), and 'DISCIPLINE'. The main results list includes three items, each with a thumbnail, title, author, and journal information. The first result is 'Fatty acids and stable isotopes (δ13C and δ15N) reveal temporal changes in narwhal (Monodon monoceros) diet linked to migration...' by Hail, Courtney A; Ferguson, Steven. The second result is 'How adaptable are narwhal? A comparison of foraging patterns among the world's three narwhal populations' by Watt, C. A.; Heide-Jørgensen, M. P.; Ferguson, S. H. The third result is 'WINTER FEEDING INTENSITY OF NARWHALS (MONODON MONOCEROS)' by Laidre, K. L.; Heide-Jørgensen, M. P. A 'Related Articles' sidebar on the right suggests additional content based on the search results.

Off Campus? Log in to access full text and more content.

University Library

Narwhal Diet

2,294 results sorted by relevance

Add results beyond your library's collection

1 online Fatty acids and stable isotopes (δ13C and δ15N) reveal temporal changes in narwhal (Monodon monoceros) diet linked to migration... by Hail, Courtney A; Ferguson, Steven

Marine Mammal Science, 01/2015, Volume 31, Issue 1

...2011 we examined diet using fatty acids, δ 15 N, and δ 13 C, in narwhals from Baffin Bay (BB...

Journal Article: Full Text Online

Preview

Related Articles

2 online How adaptable are narwhal? A comparison of foraging patterns among the world's three narwhal populations by Watt, C. A.; Heide-Jørgensen, M. P.; Ferguson, S. H

Ecosphere, 06/2013, Volume 4, Issue 6

... Stomach contents from narwhals (Monodon monoceros) in the Baffin Bay (BB) population have suggested that narwhals are dietary specialists with little behavioral...

Journal Article: Full Text Online

Preview

Related Articles

3 online WINTER FEEDING INTENSITY OF NARWHALS (MONODON MONOCEROS) by Laidre, K. L.; Heide-Jørgensen, M. P

Marine Mammal Science, 01/2005, Volume 21, Issue 1

Related Articles suggested by bX Recommender

Using stable isotopes to estimate trophic position... by Post, David M Ecology, 2002, Vol. 83 (3) p. 703-718

Extreme physiological adaptations as predictors of... by Williams, Terrie Marine mammal science, 2010, Vol. 27 (2) p. 334-349

Using stable isotopes to understand changes in ringed... by Young, Brent G Marine mammal science, 2013, Vol. 30 (2) p. 706-725

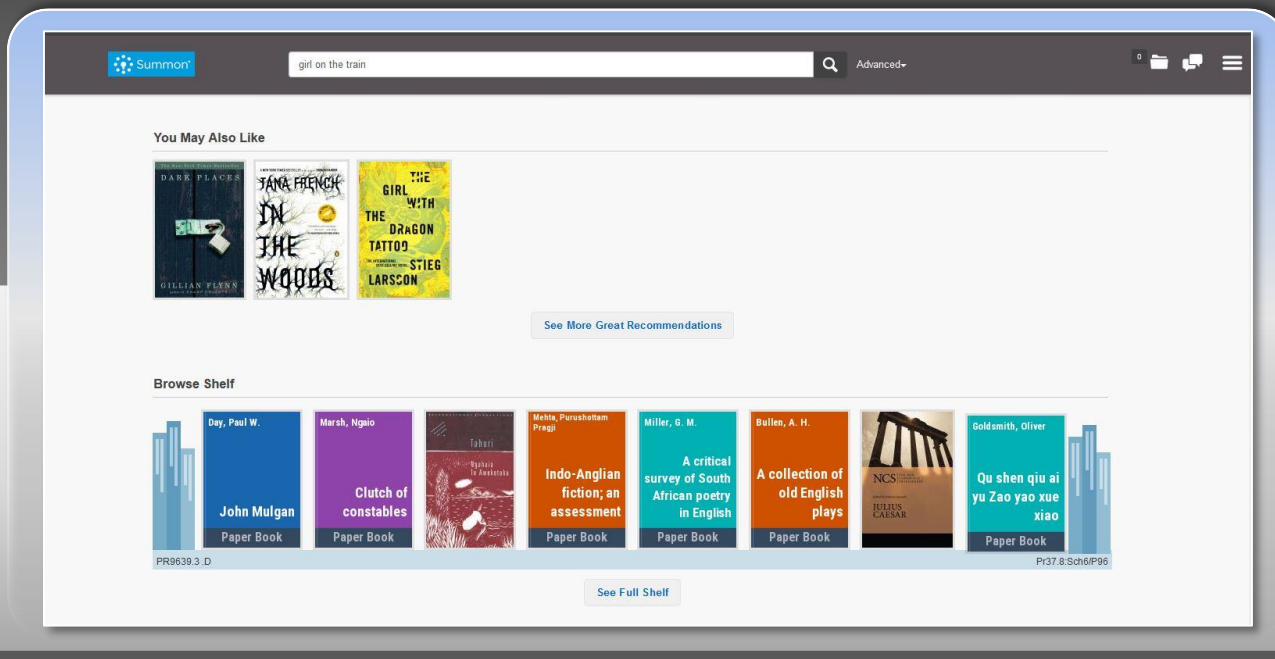
A stable isotope (δ 13 C, δ 15 N) model for the North Water... by Hobson, Keith A Deep-sea research. Part 2, Topical studies in oceanography, 2002, Vol. 49 (22) p. 5131-5150

Arctic sea ice extents, areas, and trends, 1978-1996



Customer Benefit

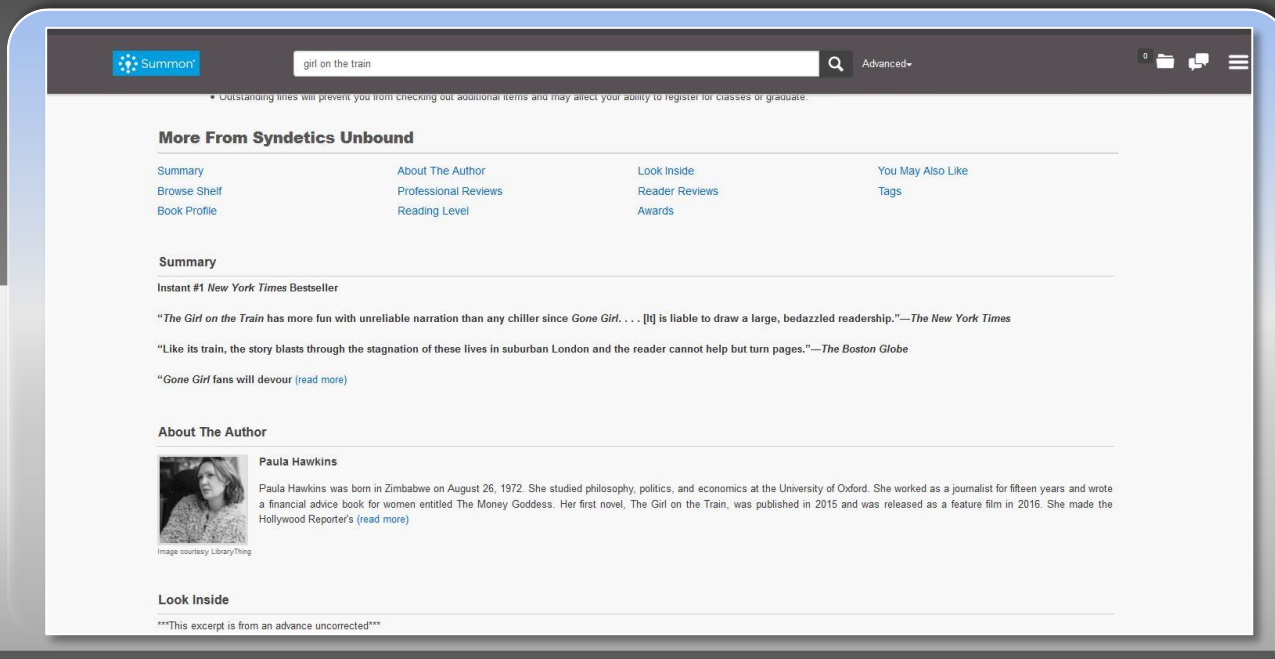
- Include the ability to “browse the shelf,” add recommendations and reviews, and a variety of other content





Customer Benefit

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



Preview Environment Phase 2

Library Empowerment



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

Setting	Value	Help
Page Title	Summon Demo Site 1	?
Home Link	http://www.proquest.com/products-services/The-Summon-Service.html	?
Feedback Email Address	person@mail.com	?
Feedback Client Email Required	OFF	?
Feedback Link		?
Feedback Roles	ON	?
About Link		?
Help Link		?
Enable Rss Icon	ON	?
Saved Items Help Link		?
Autocomplete Enabled	ON	?
Query Suggestions Enabled	ON	?
DB Recommender Enabled	ON	?
Related Records Enabled	OFF	?
Call Numbers Enabled (Availability)	OFF	?
Dewey Numbers Enabled (Availability)	OFF	?
Call Numbers Enabled (Preview)	ON	?
Dewey Numbers Enabled (Preview)	OFF	?



Customer Benefits

- 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

SOALibrary 1 exLimpl ENGLISH

My Library Card

OVERVIEW LOANS REQUESTS FINE + FEES BLOCKS + MESSAGES PERSONAL DETAILS

Loans [RENEW ALL](#)

- Lotus 1-2-3 applied : basic business mat...
Krumm, Rob,
Due: 01/09/17, 08:58
Return to: Main Library , Stacks
- The urban South /
Vance, Rupert Bayless,
Due: 09/16/16, 16:09
Return to: Main Library , Stacks
- The conquest of Mexico /
Prescott, William Hickling,
Due: 09/16/16, 16:09
Return to: Main Library , Stacks

[VIEW ALL 4 LOANS](#)

Requests

- Women in Southern history.
Women in Southern History Furman Universit...
REQUEST. In Process
Pick up: Main Library
- Life insurance fact book, 1984.
REQUEST. In Process
Pick up: Main Library
- Shiv'im ha-shanim ha-rishonot : sipur H...
REQUEST. In Process
Pick up: Main Library

[VIEW ALL 35 REQUESTS](#)

Fine + fees
Current fines balance is **0.00**.

There are no fines

Blocks + messages

There are no blocks or messages



Customer Benefits

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

The screenshot displays a search results page from a 'University Library'. The search bar at the top contains the text 'Observation of Gravitational Waves from a Binary Black Hole Merger'. Below the search bar, there are two search results, numbered 11 and 12. Each result includes a small icon (a book for result 11, a document for result 12), a title, authors, journal information, and a description. Both results have an 'Open Access' icon (a padlock with an 'O') and a 'Full Text Online' link. Result 11 is titled 'Gravitational waves from resolvable massive black hole binary systems and observations with Pulsar Timing Arrays' by Sasana, A., Vecchio, A., Volonten, M. Result 12 is titled 'Synthetic model of the gravitational wave background from evolving binary compact objects' by Doornik, Inna; Uzan, Jean-Philippe; Viana, Elisabeth; More... Both results have a 'Preview' link. The page also features a 'Back to top' link and an 'Advanced' search option.

Discipline on Advanced Search Form

User Experience



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 Summertime Advanced Search interface. At the top left is the Summertime logo, and at the top right is a 'Back to basic search' link. The main search area features four rows of search criteria, each with a dropdown menu (all set to 'All Fields'), a text input field, and a dropdown menu (all set to 'AND'). An 'Add a row' link is positioned to the right of the fourth row. Below these rows 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 'Anthropology'; '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 a checkbox for 'Newspaper articles'.

Best Bets Improvements

User Experience



Customer Benefit

- Improved administration via bulk uploading including adding Tags in the bulk import and improved support for including punctuation, longer length and HTML styling for customization.

Best Bets

Create Best Bet

Best Bet Title



Optional URL

Save or Reset

Bulk Best Bets Importer

Browse...

No file selected.

Import

CSV Structure:

<title>,<url>,<description>,<iconUrl>

[Download sample file](#)



July Release



Results Page Improvements

User Experience



Customer Benefits

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

Feature

- **Accessibility improvements**
- **New include-exclude functionality, more intuitive facet navigation and tool tips**
- **Icon and background color cleanup**
 - Better contrast
 - Ability to change icons
 - Decouple header colors from menu colors
- **More prominent Permalink placement**
- **Expand access to results beyond 200**



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

November Release





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**
- **Provides profiles, citations and affiliations for more than 3,000 scholars from COS/Pivot a ProQuest product**

Search within a Journal

User Experience



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

New England Journal of Medicine

Search within:



Customer Benefits

- 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

Brent.Cook@exlibrisgroup.com