

Driving Value through Innovation: Discovery & Resource List Solutions

Product Update & Strategy

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A growing community
> 3,300 institutions using
Summon & Primo



Increased usage
+30% searches vs. 2016



More open access content
> 220 M items indexed



More scholarly resources
>520 collections indexed



Accelerated adoption of innovation

> 35 Leganto customers **> 50 K** Leganto users **> 100** new Primo UI customers



The Power of Collaboration: Community in Action

ExLibris
Summon

- First NERS voting
- Summon on the Idea Exchange
- Summon Product Working Group

ExLibris
Primo

- Continued collaboration with Product Working Group
- 5 NERS enhancements implemented
- >170 ideas suggested, >10 implemented/planned
- New UI workshops



New discussion paper:

Driving Innovation through Community Collaboration
The Case of the New Primo User Interface

www.resources.exlibrisgroup.com/opendiscovery

ExLibris
a ProQuest Company
ideaexchange

Summon

Your feedback matters. We would love to hear from you. You can also commit to responding to ideas.

For more information, visit the [Idea Exchange](#).

How can we help you?

Enter your idea

Hot Top idea

89 votes
Vote

38 votes
Vote

ExLibris.
a ProQuest Company

Driving Innovation
through Collaboration:
The Primo Open Discovery Framework

The Power of Synergy: Enriching Discovery

Content



Metadata



Expertise



Technology



ExLibris
Summon

ExLibris
Primo

Summon

- bX Article Recommender
- OBI analytics & reports
- Preview environment
- Integration with Alma

Shared Content

- > 2.9 billion records
- > 4,000 databases
- Unified ingestion process
- Metadata librarians team

Primo

- Extended collection coverage
- Enriched with Ulrich's metadata
- Enhanced Leganto integration
- Enhanced integration with Alma

The Power of Openness



ExLibris
Primo

Primo

- **Open Discovery Framework**

- Extend Primo services & functionality
- Embed external services
- Add components
- Customize and develop on local server
- Share with the community!

- **Enhanced linked open data**

- **First Primo Hackathon!**

The Open Discovery Challenge!

Develop on the new Primo UI, share with the Primo community, and... compete for a prize!

Play to win:

1. IGeLU/ELUNA ticket + online learning course of your choice (up to \$500)
2. Online learning course of your choice (up to \$250)
3. Powell's City of Books gift card (value \$100)

Submit your project on:

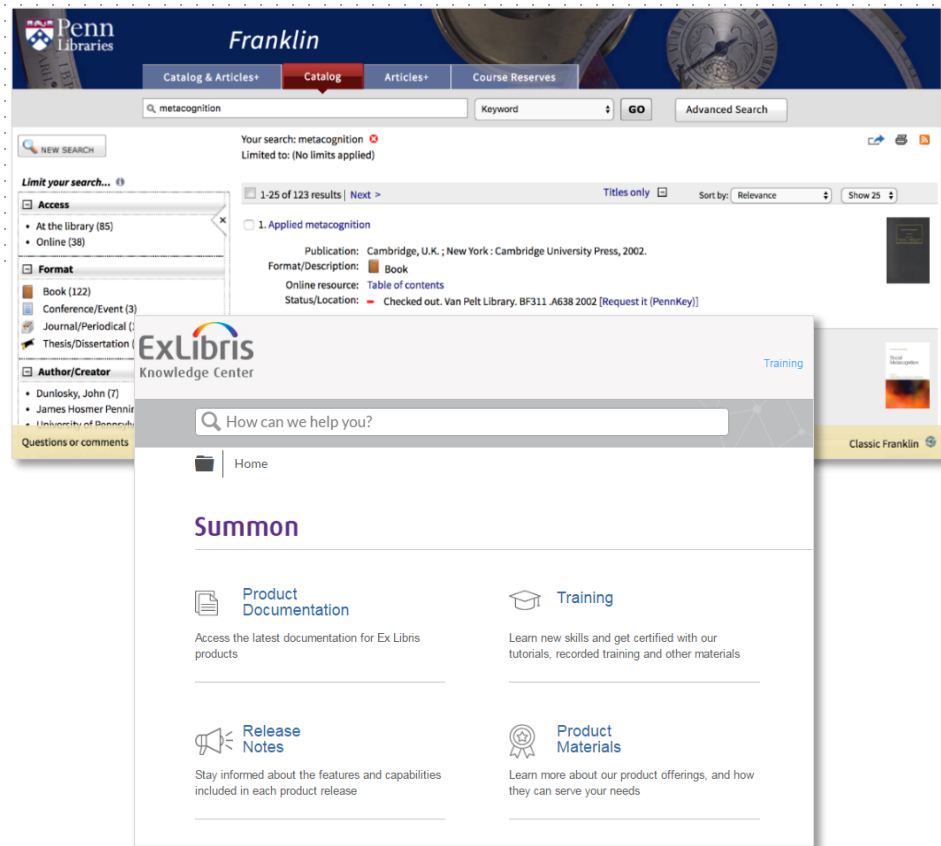
www.value.exlibrisgroup.com/opendiscovery

The Power of Openness



Summon

- Integration with open source discovery
- Enhanced APIs
- Developer Network
- Open documentation:
Customer Knowledge Center





Driving Continuous Innovation: Product Strategy and Roadmap



Discovery Product Strategy

Enhance User
Experience



Empower Libraries &
Librarians

Expand and Enrich
Discoverable Content



Embed Discovery in the
Academic Ecosystem



Expand and Enrich Discoverable Content

Promote Open Access

- A company-wide focus: Unique collections, discovery index, linking, resource management tools
- Today: Over 220 M index items identified as “Open Access”
- Roadmap focus areas:
 - Review and index additional openly available content
 - Index and externalize institutional repositories
 - Improve discoverability of OA items – search, filters, indicators, reports

Enhance content coverage

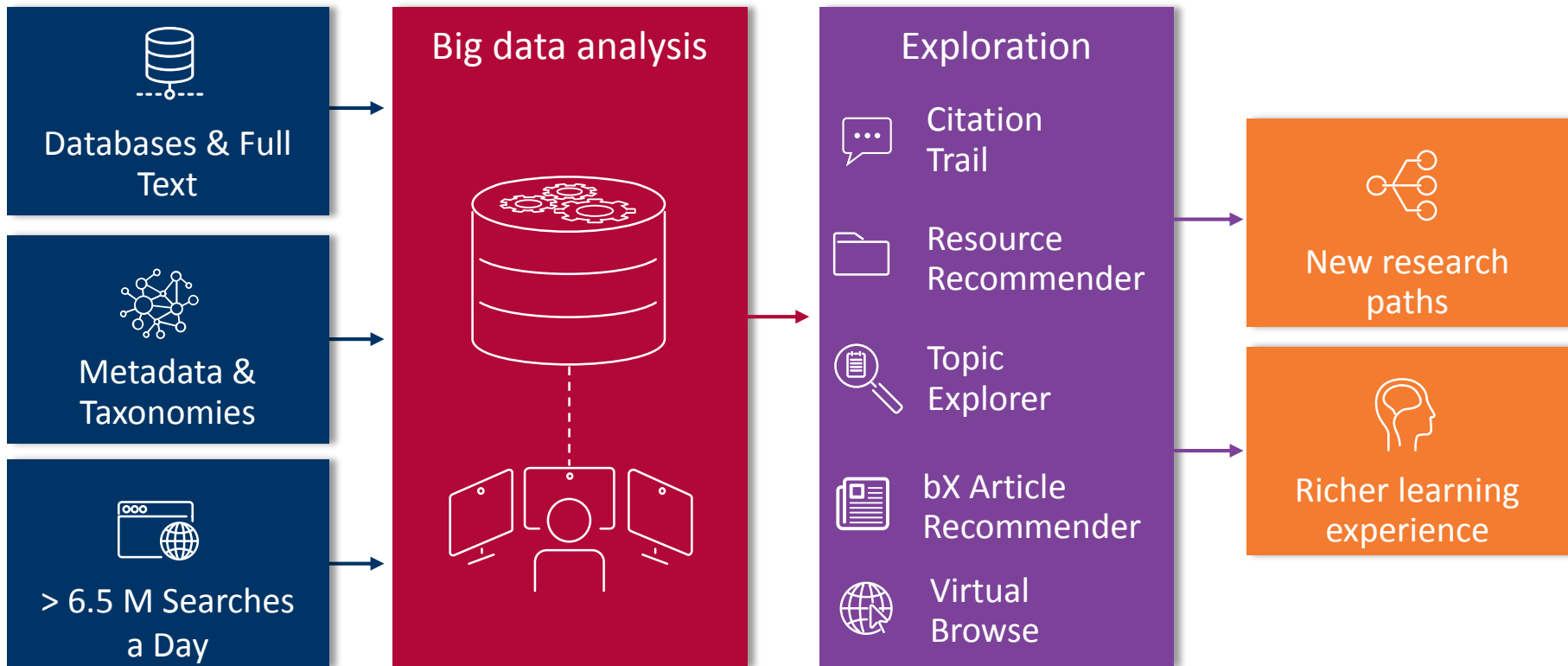
- Community driven: NERS voting, Idea Exchange Content forum (New!)
- Finalizing remaining Primo-Summon content gaps

Enrich metadata with controlled vocabulary

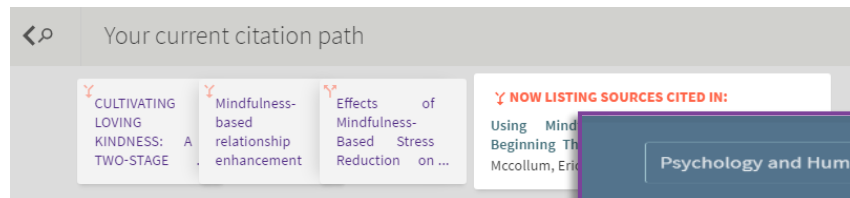
Leverage multimedia content

- Enrich discovery experience with video content (e.g. Alexander Street)

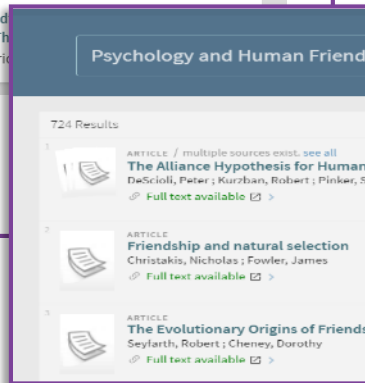
User Experience: The Power of Big Data



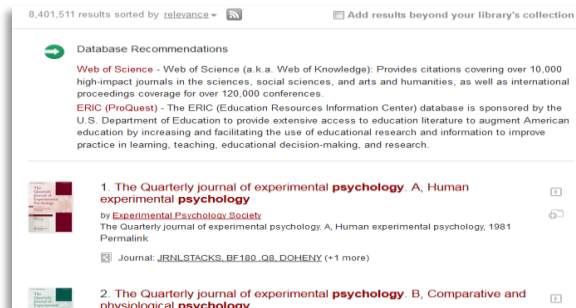
User Experience: The Power of Big Data



Citation Trail



Resource Recommender



Exploration



Citation Trail



Resource Recommender



Topic Explorer

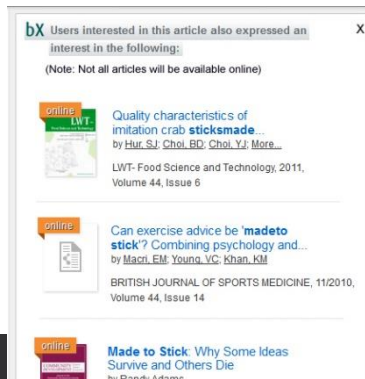
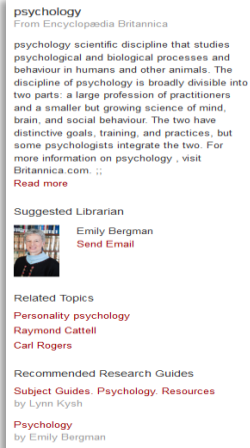


bX Article Recommender



Virtual Browse

Topic Exploration



Library Productivity: Summon Integrated with Alma

Unified management & discovery of resources

End-to-end resource delivery & fulfilment

Integrated and advanced patron services

- Integration released!
- Eastern Michigan University – live by May '17
- Rich roadmap



The screenshot displays the Summon search interface. At the top, a search bar contains the query 'mechanical systems design handbook'. Below the search bar, a sidebar on the left offers filters for 'REFINE YOUR SEARCH' (Full Text Online, Scholarly & Peer-Review, Library Catalog), 'CONTENT TYPE' (Book / eBook, Paper, Government Document, Journal / eJournal), 'AUTHOR', 'DISCIPLINE', and 'PUBLICATION DATE'. The main results area shows 85,263 results sorted by relevance. The first result is 'The mechanical systems design handbook: modeling, measurement, and control' by Neelam, Omer D. I. Hummady, Yildirim. A detailed view of this result is shown on the right, including the title, ISBN (0849385962), and availability status (Available). Below the title, there are buttons for 'TOP', 'SEND TO', 'GET IT', 'DETAILS', and 'LINKS'. The 'SEND TO' section includes options like 'EXPORT RIS', 'EAD/BI', 'ENROUTE', 'REFWORKS', 'PRINT', 'PERMALINK', 'CITATION', and 'EMAIL'. The 'GET IT' section shows a 'REQUEST: Request / Purchase Request' button. The 'LOCATION ITEMS' section lists the item's location (Eastern Michigan University Library, Circulating Collection TS176 .M42 2002) and provides details like 'Item In place', 'Location: Circulating Collection Circulating Collection', 'Barcode: 32307022085543', and 'Item Type: BOOK'. The 'DETAILS' section at the bottom shows the title and a link to the full text.

Library Productivity: Primo-Alma Workflow Optimization

Simplifying & expediting Primo back office processes by leveraging Alma platform

- Streamlining publishing processes
- Real-time discovery of records created in Alma
- Simplified product implementation process
- Unified back office management of Primo and Alma

In collaboration with our
development partners!



Primo deployment name for documentation, training, Salesforce, and support purposes: **Primo VE**

Summon Roadmap Highlights



Enhanced Content & Metadata

- Add new collections and data sources
- Enhance population of Open Access indicators and ORCID



Library Empowerment

- Increased frequency of rights
- Summon over Alma
- Preview environment v2
- Content indication in index



Exploration & Relevance

- Subject term controls in UI



Openness

- Ex Libris Developer Network
- API documentation
- Topic Explorer for API



User Experience

- Results page improvements
- Search within Journal
- Course reserves
- Discipline on advanced search
- Scholar Profiles



Analytics & Reporting

- Additional events
- Additional custom reports

Primo Roadmap Highlights



Enhanced Content & Metadata

- New content
- Finalize gaps with Summon
- Resource type improvements
- Increase population of Open Access indicators and ORCID
- Virtual enriched record



Library Empowerment

- Primo-Alma optimization initiative
- Additional display fields
- Changing author links



Exploration & Relevance

- Resource Recommender
- Related topic trail
- Enhanced “did you mean”



Openness

- Open Discovery Framework
- Linked data
- Additional REST APIs



User Experience

- Search history
- Personalization
- Enhanced collection discovery
- Reference entry
- Journal A-Z



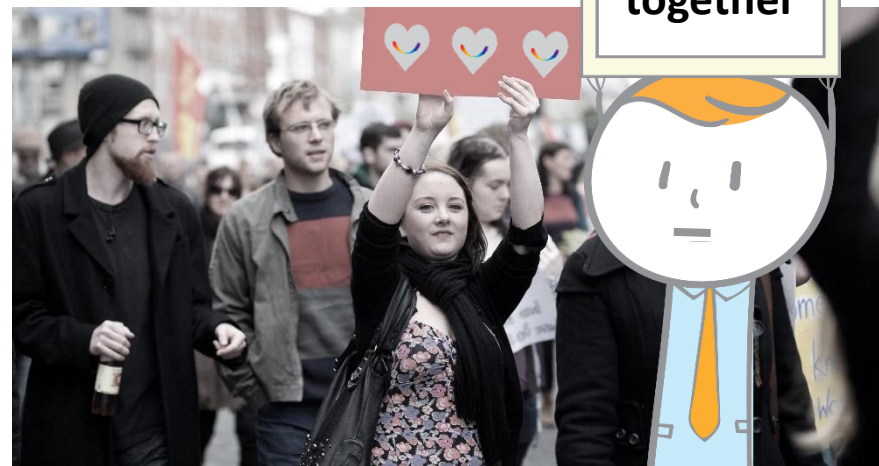
Analytics & Reporting

- Additional reports



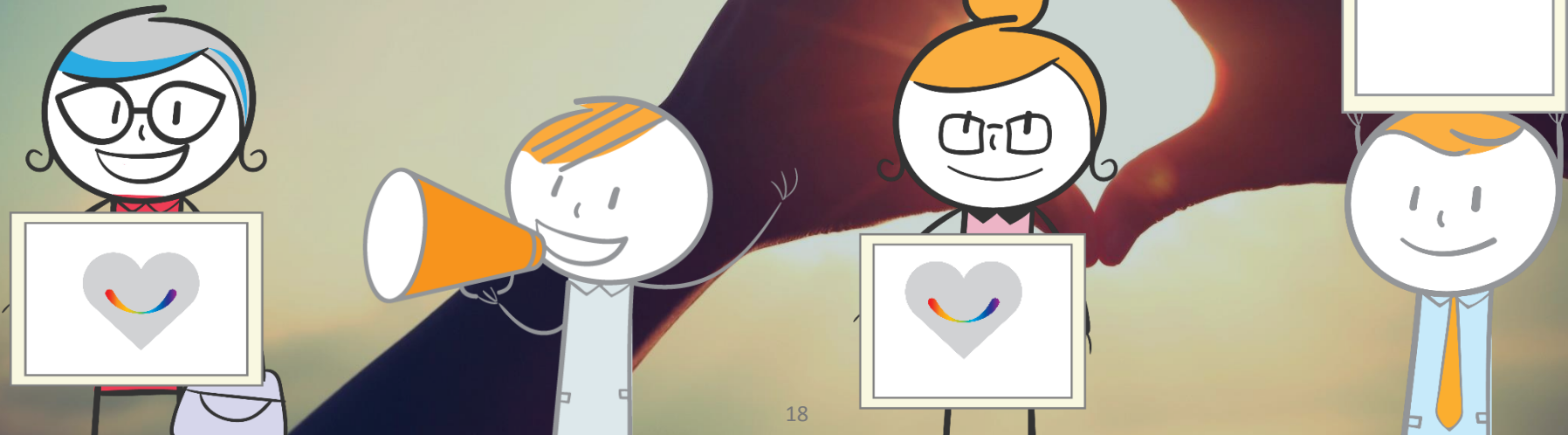
Ex Libris Leganto: It's Time to *LOVE* Reading Lists





Our mission:

Make everyone love
reading lists!



We



**Reading
Lists**

Making Schools Love Reading Lists



**Improve learning
affordability**



**Enhance student
engagement**



**Streamline teaching &
learning workflows**

Vanderbilt:

As of first semester –

- 158 supported courses
- 34 courses using all library-subscribed & free content
- Seamless integration with Blackboard and Brightspace

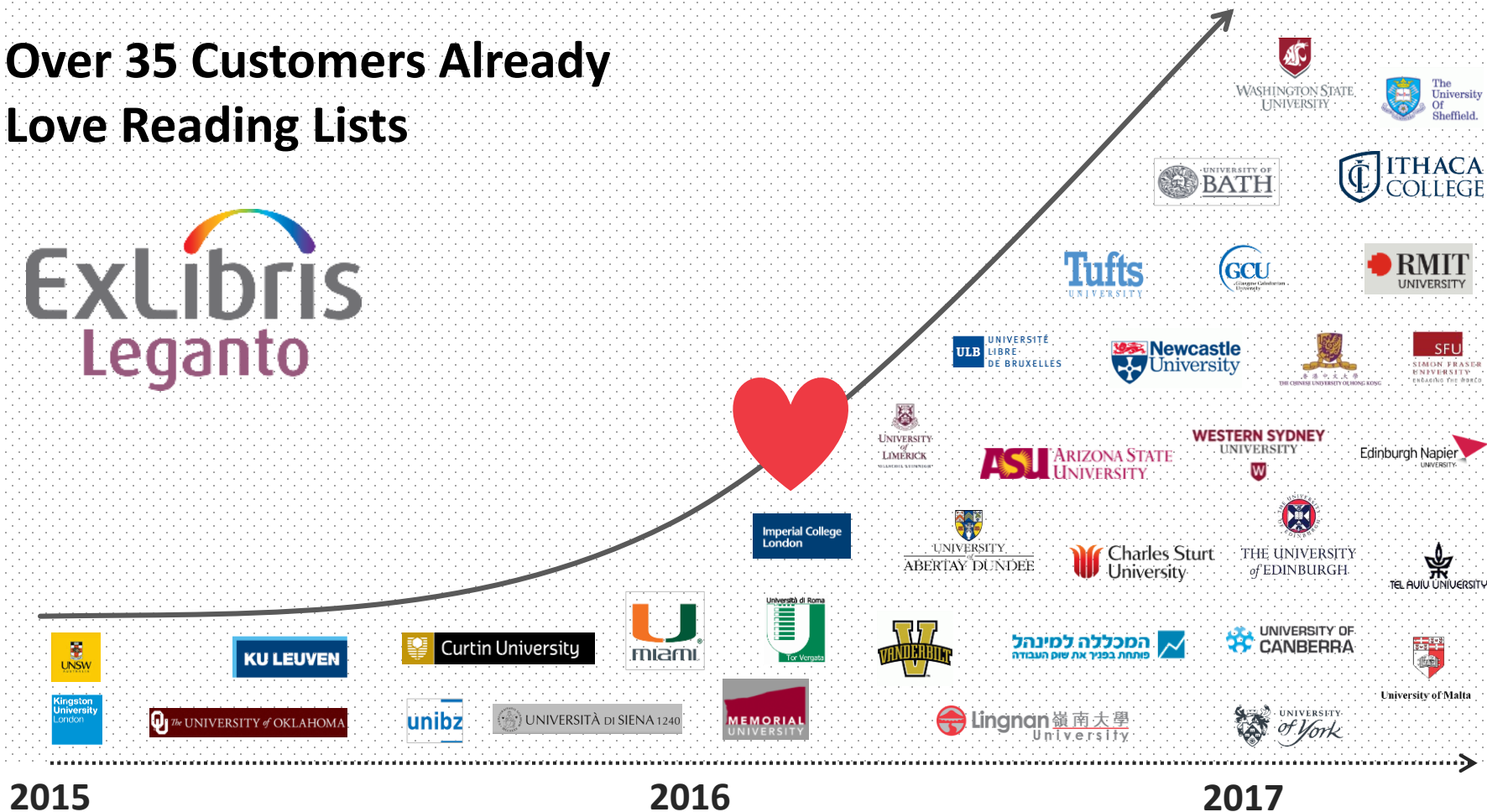
Benefits achieved so far:

- **52% savings on course materials**
- Instant and convenient access to materials
- Flexible payment options



Over 35 Customers Already Love Reading Lists

ExLibris
Leganto



Making Libraries Love Reading Lists



**Strengthen partnership
with faculty**



**Maximize
collection usage**



**Enhance library
productivity**

Washington State University:

- End-to-end workflows with Alma
- “Transforming the library's workflow” for obtaining copyright
- Saving money on unused copyrights, especially for global online courses
- Plan to convert all course reserves to run under Leganto by summer 2017



“The ultimate goal... is to provide students with the best materials for their courses at the lowest cost, and to do so in an easy-to-use interface... we believe that Leganto does a great job of accomplishing this.”

Blake Galbreath, Core Services Librarian

Making Instructors Love Reading Lists



Provide great user experience

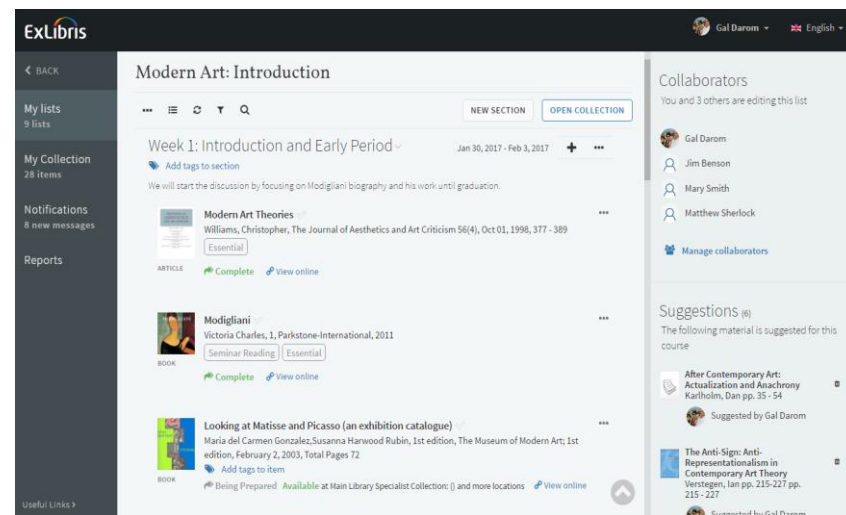


Enhance reading list effectiveness



Gain flexibility and control

- Structure, annotate, and drag and drop items to easily create new lists
- Share and maintain with ease
- Include all types of materials
- Understand what materials students use
- Enrich lists via suggestions and recommendations



Making Students Love Reading Lists



**Save money
pay as you go**



**Access lists via a mobile-
ready, easy to use UI**



**Collaborate and share
feedback**

Growing adoption worldwide:

1,000,000+

Reading list page views

50,000+

Unique users

2,500+

Live courses



Spread the Love:
#ilovereadinglists

Join Us to Learn More!

❖ Summon Product Update

Wed., 1:30pm, Nirvana B-C

❖ Primo Product Update

Wed., 1:30pm, Schaumburg West

❖ Leganto Product Update

Wed., 2:30pm, Knowledge

❖ SFX Product Update

Wed., 3:45pm, Knowledge

❖ Summon Demo

Wed., 4:45pm, Schaumburg E-F

❖ Talk Back: Summon/360 Q&A

Thu., 11:15pm, Schaumburg G-H

❖ Primo Demo

Thu., 3:15pm, Utopia D

❖ UX Design & Open Discovery Platform

Thu., 3:15pm, Utopia B

❖ Content Ingestion: The Trials and Triumph

Thu., 3:15pm, Innovation

❖ Leganto Demo

Fri., 9:00am, Innovation

❖ Primo Optimized for Alma

Fri., 9:00am, Utopia C

❖ 360 Product Update

Fri., 10:00am, Knowledge

THANK YOU

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