Summon and Primo 2017

ProQuest Day Moscow / St. Petersburg

Christian Motoovsky, Senior Account Manager
The Power of Synergy: Enriching Discovery

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

**Metadata**
- > 2.9 billion records
- > 4,000 databases
- Unified ingestion process
- Metadata librarians team
  → Indexes remain separate

**Technology**

**Expertise**

**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
  → Indexes remain separate

**Primo**
- Extended collection coverage
- Resource recommender
- Enhanced integration with Alma
- Enriched with Ulrich’s metadata

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The Power of Openness

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
- Primo Hackathon

Altmetrics integration

Adding Search Tips

Openness & collaboration:
The case of the new Primo UI

www.resources.exlibrisgroup.com/opendiscovery

Driving Innovation through Collaboration:
The Primo Open Discovery Framework
The Power of Openness

Summon

- Integration with open source discovery
- Enhanced APIs
- Developer Network
- Open documentation: Customer Knowledge Center
Discovery Product Strategy: Making Libraries (and users) Happy

- Expand and enrich discoverable content
- Enhance user experience
- Empower libraries & librarians
- Embed discovery in the academic ecosystem

Driven by community collaboration and open integrations
Expanding and Enriching Discoverable Content

- Further expand collections coverage
- Enrich metadata with controlled vocabulary
- Promote Open Access
- Enhance use of multimedia content
Enhancing the User Experience: The Power of Big Data

**Databases & Full Text**
- Metadata & Taxonomies
  - > 6.5 M Searches a Day

**Big data analysis**

**Exploration**
- Citation Trail
- Resource Recommender
- Topic Explorer
- bX Article Recommender
- Syndetics Unbound

**New research paths**

**Richer learning experience**
Discovery Product Focus Areas

- Enhanced Content & Metadata
- Exploration & Relevance
- User Interface
- Library Productivity
- Collaboration and Openness
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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

Leverage multimedia content

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

Enrich metadata with controlled vocabulary
Discovery Product Focus Areas

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Search and Find – Highlights

Search expansion with controlled vocabulary

Based on LC subjects, MeSH, and Wikipedia

General search improvements

- Improved performance for long queries and queries including common words
- Improved handling of diacritics and accented characters
- Added option to use truncation in searches with quotation marks

Increase glanceability and linking for Primo Central preferred records in a group

Enrich preferred record with fields from other records in the same group
<table>
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<th><strong>Search and Find – Coming Next</strong></th>
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<td>Improve and enhance the “Did you Mean” function</td>
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<td>Improve discovery of newspaper articles</td>
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<td>Enhance search expansion with controlled vocabulary</td>
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<td>Contextual relations between items: Data/R&amp;D lab</td>
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Discovery Product Focus Areas

- Enhanced Content & Metadata
- Exploration & Relevance
- Library Productivity
- Collaboration and Openness
- User Interface
Overview of Enhanced User Interface – The Benefits

Improve usability and responsive behavior through enhanced and refreshed design

✓ Delivers modern user interface to improve user engagement
✓ Makes it easier to search for, navigate, and refine results
✓ Increases patron ability to leverage integrated tools
✓ Enhances visibility of recommended resources
Integration with Syndetics Unbound

• Create a richer user experience on the catalog records

• Additional exploration paths
New Primo User Interface

Over 300 live customers!

Out-of-the-box or customized

Great feedback from users
Digital Collections – New Look and Feel

- Ease of navigation
- Items in a grid and gallery view
- Save your favorite collections
Discovery Product Focus Areas

Enhanced Content & Metadata

Exploration & Relevance

User Interface

Library Productivity

Collaboration and Openness
Maintain the Same Discovery Experience

- Addition of My Account and Journal Search
- Consistent interface
- Customizations maintained
- No impact on training and instruction
New Design for the Settings Tab in the Summon Admin Console

- Loads Faster
- Streamlines Navigation
- Simplifies Setting Activation
Library Productivity

- Additional display fields
- Changing author links
- Additional reports
Discovery Product Focus Areas

- Enhanced Content & Metadata
- Exploration & Relevance
- User Interface
- Library Productivity
- Collaboration and Openness
Summon Collaboration

- Dev network
- NERS
- Additional APIs
  - Topic Explorer
  - Improved Availability
Primo Open Discovery Framework – Essentials

Customize, Develop & Collaborate
Immediate display of changes
Manageable upgrades

Simple way to display default ‘factory’ UI
Share with the community
Primo Open Discovery Framework – Customer Examples
Primo API’s

Coming Soon: Publication of Primo Rest API as used by the new interface

• Well documented in Primo developer network
• Integrated with Ex Libris API Gateway
• Including:
  • Search API
  • Full record page
  • Favorites
  • Push to Actions
  • Personal settings
  • Resource Recommender
  • Citations Trails
  • And More ...
Seamlessly enrich the user interface with linked open data from external sources related to the records discovered

Expose library records in common schemas to be indexed by Internet search engines
2017 was a great year...

But Guess What ...
Next year is going to be even more exciting...

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