



# Converis Product Update

Christine Stohn



# Agenda

- Converis in brief
- Converis as part of Ex Libris
- Converis 2022 and beyond



# Converis manages the entire lifecycle of research



Pre-Award Phase  
↓

Discovery & planning

- Programs
- Funding opportunities

Application review process

- Proposals
- Committee reviews
- Levels of ethical reviews
- ...

↓

Contracts & funding award

- Contract
- Approved budget

Post-Award Phase  
↓

Monitor outcomes

- Project reports
- Progress Reports
- Final Reports
- Budget Monitoring
- Country specific research output reports
- ...

Review impact

- Research output/Publications
- Research Portal & Profiles
- Institutional-Repository

# Converis Modules

Converis



## Pre & Post Award

- Projects and project applications
- Project workflows
- Finance/HR integration

## Publication Management

- Publication import
- Push for validated publications from Converis to ORCID.

## Research Portal

- Showcase for research outputs

## Intellectual Property

- Applications for licences and patents
- Association with the originating projects.

## Graduate Student Management

- Graduate student research
- Study plans
- Supervisory meetings.

## Advanced Analytics

- Reporting
- Report design and creation

# Flexibility – central to Converis

Converis can be configured to a very large degree

**Data model:** adding entities, link entities, attributes and relation type attributes to capture any type of information.

**User rights:** Adding new user roles or modifying existing ones on a granular level down to view and edit rights on individual attributes and relations.

**Workflows:** Adding or modifying workflow steps per entity, user rights per user role and workflow step, setting up notifications.

**Templates:** Layout and structure of detailed pages for the Research Portal, browse pages and static pages, and changing most texts in the system.

**Integrations:** The mapping can be changed for standard or new integrations can be set up using Converis Data Integration Server.

**Converis Web Services** for reuse of data marked as public to present on any web pages

**Reports:** Supports full Business Intelligence functionality with possibilities to manage data sources and to design custom reports.



## Converis as part of Ex Libris

# Ex Libris 2022– Snapshot

 **5,000+**

Institutions in the  
Ex Libris cloud

**7,500+**

Product installations  
in the Ex Libris cloud

**85+** of world's  
top 100 universities

**105+** ARL  
institutions

**50** National  
libraries

**\$110+ B**

Funding  
opportunities  
available via Pivot-RP

**4.7+ B**

Records in Central  
Discovery Index

**2,200+**

Member institutions in  
Ex Libris user groups

 **ELUNA**  
Ex Libris Users of North America

 **IGOLU**  
International Group of Ex Libris Users

 **Ex Libris**<sup>®</sup>

Part of **Clarivate**



**900+**  
Employees  
globally

**2,200+**

Customer ideas  
on the Ex Libris  
Idea Exchange

**>230 M**

API calls  
per month

**90** countries

**8** Data centers



# Converis as part of Ex Libris

## LIBRARY MANAGEMENT

Alma  
Rapido  
RapidILL  
Rosetta

## DISCOVERY

Primo  
Summon  
SFX

## RESEARCH

Esploro  
Converis  
Pivot-RP

## LIBRARY MOBILE & LEARNING

campusM  
Leganto

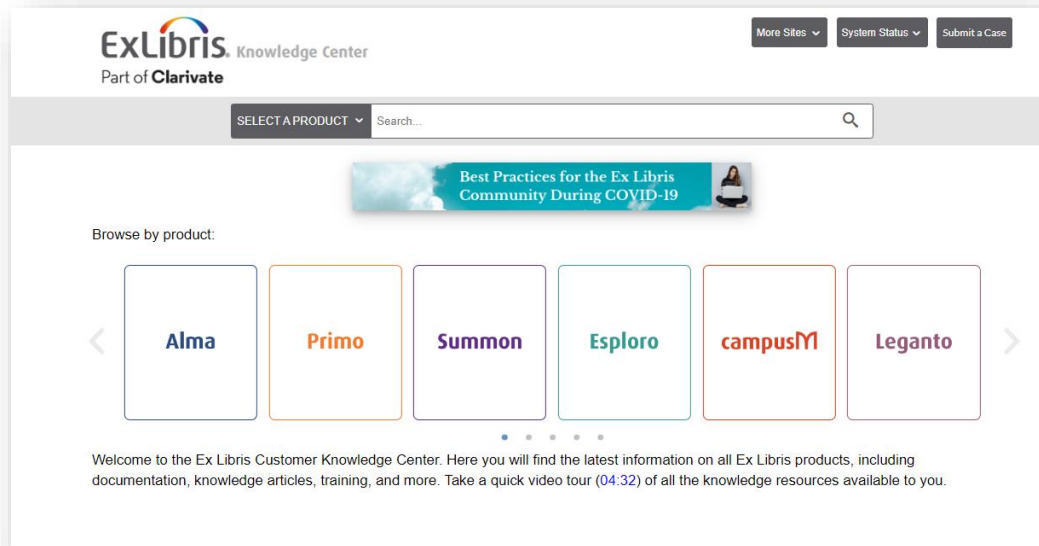


# Converis as part of Ex Libris

- The team remains as is

Contact us at [converis-info@clarivate.com](mailto:converis-info@clarivate.com)

- Converis documentation will be moved to the Ex Libris KnowledgeCenter  
<https://knowledge.exlibrisgroup.com/>



## Converis as part of Ex Libris

- The team remains as is
- Converis documentation will be moved to the Ex Libris KnowledgeCenter <https://knowledge.exlibrisgroup.com/>
  - The roadmap is already on the Ex Libris KnowledgeCenter
- Another important change:

Contact us at [converis-info@clarivate.com](mailto:converis-info@clarivate.com)

### Bi-annual major releases:

- v6.18 September 2022
- v6.19 March 2023

Communication is sent by email to a contact list



## Converis 2022 and beyond

# Roadmap published

[https://knowledge.exlibrisgroup.com/Converis/Product\\_Materials/Roadmap/Converis\\_Roadmap\\_2022\\_-\\_H1%2F%2F2023](https://knowledge.exlibrisgroup.com/Converis/Product_Materials/Roadmap/Converis_Roadmap_2022_-_H1%2F%2F2023)

The screenshot displays the ExLibris Knowledge Center interface. At the top, the logo for ExLibris Knowledge Center is visible, along with navigation links for 'More Sites', 'System Status', and 'Submit a Case'. The main content area features a breadcrumb trail: Home » Converis » Product Materials » Roadmap » Converis Roadmap 2022 - H1/2023. The page title is 'Converis Roadmap 2022 - H1/2023'. Below the title, there are navigation icons and a 'Table of contents' button. The 'Release Schedule' section lists major releases twice a year, with planned major releases for v6.18 in September 2022 and v6.19 in March 2023. The 'Roadmap Focus 2022 and Plans for H2/2022 and H1/2023' section includes an 'Overview' and a 'Quality Assurance (v6.17)' section, which mentions 'Increased testing on customized environments'.

2022

2023

## Focus areas

- Stability and quality
- Customer generated enhancements
- Integrations with other used products

## Focus areas

- Ease of use
- Customer generated enhancements
- Integrations with with other used products
- Stability and quality

February release (6.17)

September release (6.18)

March release (6.19)

September release (6.20)

Change of release schedule to twice a year  
(March/September)

- VIVO Connector
- WoS Expanded integration with REST API
- Quality assurance enhancements

- General enhancements**
- Pentaho upgrade
  - Status comment field enhancement
  - Archiving feature enhancement
- Integration enhancements**
- Journal Citation Reports (JCR)
  - HR (Human Resources) Integration

- General enhancements**
- Delegation management enhancements
  - Flexinumber improvement
- Integration enhancements**
- Incites API V2
  - Web of Science more collections

- Ease of use (usability) – shorten heavily used processes
- Enhancements/ Features based on AHA
- Further Integrations
- Stability and Quality (stable bug backlog)

# Quality assurance

- Increased testing on customized environments
- Earlier testing processes
- Increased number of automated test scenarios
- Daily performance tests
- Quicker releases for important bug fixes



## September 2022 release (6.18)

# (Workflow) Status comment field enhancement

- New choice added – now three options are available (configurable per workflow matrix)

1. No comment field
2. Comment field that is mandatory to be filled in
3. Comment field that is optional to be filled in

### Workflow Matrix ?

**Edit:** Library

Select user role: Library  
 Select entity: Publication  
 Selector CGV: Journal article  
 Status comment:  Optional  Mandatory

**(Column C)** This setting applies to the entire workflow matrix. It is not possible to set if comment is set to mandatory, the user can save the entity in a different status if filled in.  
 To remove the status comment field entirely from a specific status, uncheck

	New status	1	C	2	C	3	C	4
Current status	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Non-validated	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For validation by library	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Validated	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Archived	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

**Set status**

This needs a further validation because of....

46/1024

**Non-validated**  
 Choose this status if you wish to continue working on this record at a later stage.

**For validation by library**  
 In this status, the library will validate the record.

**Validated**  
 In this status, the record has been validated.

**Archived**  
 An archived publication is no longer

... and a small addition: We added a character count function to the comment field



# JCR enhancements (for JCR subscribers)

- Move from file upload to API

JCR data is added to the edit and browse windows of journals under Publication Management -> Journals

- Additional link in the journal browse page directly to the JCR

Dashboard > Journals > Edit Human Performance (0895-9285)

Publicly visible | Internally visible | Verified - visible to the public | Admin Info

Human Performance (0895-9285)

Key Information | Publisher Policy | JCR Metrics

2021

Journal Impact Factor: 2.972  
5 Year Journal Impact Factor: 3.209

PSYCHOLOGY, APPLIED

JIF Rank	JIF Quartile	JIF Percentile
42/83	Q3	50.0

Journal Citation Indicator: 0.73  
Eigenfactor score: 0.00078  
Normalized Eigenfactor: 0.16833  
Article Influence Score: 0.511

All years

PSYCHOLOGY, APPLIED

Year	JCI	JIF	5 Year JIF	JIF Rank	JIF Quartile	JIF Percentile
2020	0.58	2.423	2.955	53/83	Q3	36.747
2019	0.42	1.172	2.112	67/84	Q4	20.833
2018	0.5	1.998	1.943	60/82	Q3	27.439
2017	0.58	1.128	1.938	51/82	Q3	26.22
2016		1.302	1.75	49/80	Q3	39.375

Web of Science | InCites | Journal Citation Reports | Essential Science Indicators | EndNote

Converis

Search | Help | Config Admin: admin, config

Dashboard > Journals > Browse Forensic Science International...

Forensic Science International

ISSN: 0379-0738  
Publisher: Elsevier  
JCR link: View in JCR

Publisher Policies  
submitted: No Embargo

Publications  
Injuries by chicken bills: Characteristic wound morphology; Roll P, Rous F.; 1991; Journal article  
INJURIES BY CHICKEN BILLS - CHARACTERISTIC WOUND MORPHOLOGY; ROLL P, ROUS F.; 1991; Journal article  
Injuries by chicken bills: characteristic wound morphology.; Roll, Rous; 1991; Journal article  
Shape measurement tools in footwear analysis: A statistical investigation of accidental characteristics over time; Sheets HD, Gross S, Langenberg G, et al.; 2013; Journal article

2021

Journal Impact Factor: 2.676  
5 Year Journal Impact Factor: 2.662

MEDICINE, LEGAL

JIF Rank	JIF Quartile	JIF Percentile
5/17	Q2	73.529

# Two additional smaller improvements

## Archiving/snapshot feature

- Removed limitation for snapshot / archiving in the edit page (to attributes present in the edit page).

## HR (Human Resources) Integration

- Improvements to parsing of unescaped characters and invalid values. In case there are records that have been provided in incorrect format in CSV source files, concerned records will be excluded but other valid records will still get imported.

# September release availability

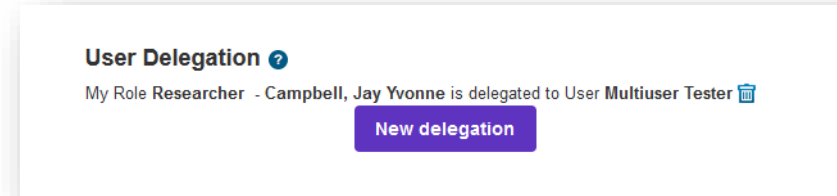
- **Release date:** September 22
- **Release notes and new JCR documentation:** will be available from the KnowledgeCenter
- **Release emails** go to the contact list



## March 2023 release (6.19)

# On the roadmap for March 2023 - enhancements for delegation management Converis

- **Added start date and end date** for the delegation setting (similar to an out-of-office notification).
- **Added option** for a config admin user **to check for delegations**.
- **Add option to export a list of delegated user roles:** Delegator & delegated role, delegate for the purpose of data maintenance purposes by a system/support administrator.
- **Add option to trigger a confirmation email** upon user delegation to the person delegating, and the person a role is delegated to.



This screenshot shows the configuration form for a user delegation. It is titled 'User Delegation' with a help icon. The form includes a 'Select user:' field with 'Abendstern, Annabelle' and a search icon. Below this is a note: 'Start date and end date is optional. If it is empty the delegation is unlimited until it will be deleted manually.' There are two date fields: 'Start date:' with '03.09.2022' and 'End date:' with '21.09.2022', both with calendar icons. A purple 'Save' button is at the bottom.

# Also on the roadmap for March 2023

- Enhance **InCites Metrics** to import additional data from InCites API to Converis
  - SDGs (Sustainable Development Goals)
  - Citation Topics
  - Open Access Status
  
- Move **validation for flexinumbers** to the client side

2022

2023

### Focus areas

- Stability and quality
- Customer generated enhancements
- Integrations with other used products

### Focus areas

- Ease of use
- Customer generated enhancements
- Integrations with with other used products
- Stability and quality

February release (6.17)

September release (6.18)

March release (6.19)

September release (6.20)

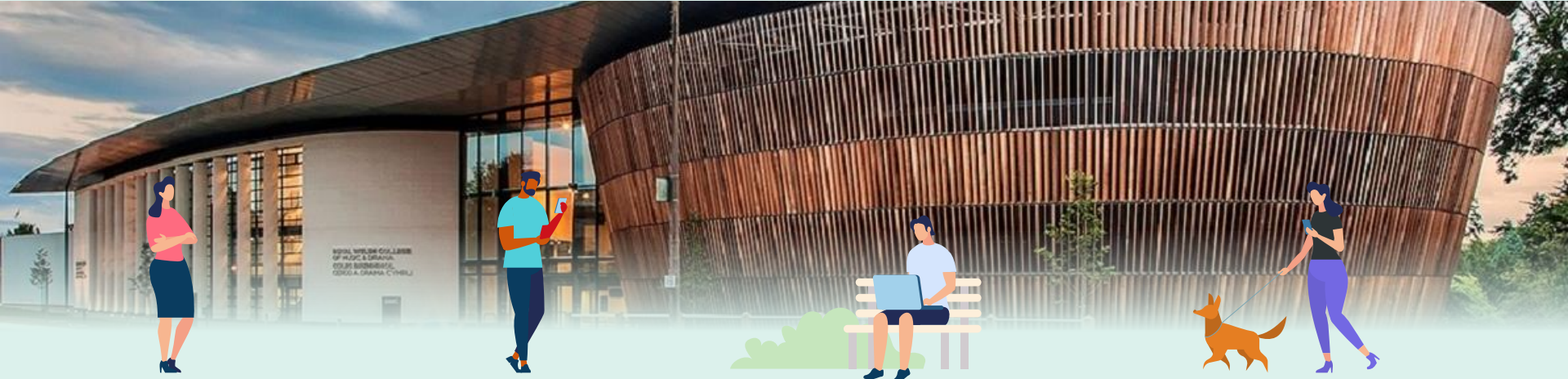
Change of release schedule to twice a year  
(March/September)

- VIVO Connector
- WoS Expanded integration with REST API
- Quality assurance enhancements

- General enhancements**
- Pentaho upgrade
  - Status comment field enhancement
  - Archiving feature enhancement
- Integration enhancements**
- Journal Citation Reports (JCR)
  - HR (Human Resources) Integration

- General enhancements**
- Delegation management enhancements
  - Flexinumber improvement
- Integration enhancements**
- Incites API V2
  - Web of Science more collections

- Ease of use (usability) – shorten heavily used processes
- Enhancements/ Features based on AHA
- Further Integrations
- Stability and Quality (stable bug backlog)



# Thank you!

[christine.stohn@clarivate.com](mailto:christine.stohn@clarivate.com)

