Summon Quarterly Product Update

November 2016

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Agenda

• What’s Coming in the December Release?
• How have we improved Quality Assurance?
• What’s the plan for 2017?
• How can we get involved?
What’s coming in the December Release?
Features and Fixes
**SUMMON 2016 RELEASE PLAN**

**MARCH RELEASE**
- March 9th – Release launch date

**JUNE RELEASE**
- June 15th – Release launch date

**AUGUST RELEASE**
- August 24th – Release launch date

**DECEMBER RELEASE**
- December 15th – Release launch date

* The date refers to the date the release will be completed across all Summon datacenters
**Summon 2016 Release Plan**

**MARCH RELEASE**
- Citation Improvements
- Translation Improvements
- Permalink Improvement

**JUNE RELEASE**
- Search Widget Builder
- Chat Client integration
- Results Page UX Improvements (Phase 1 – Planning and Testing)

**AUGUST RELEASE**
- Relevance Improvements
- Topic Explorer – Increase Topic Coverage; Additional Content Sources
- Results Page UX Improvements (Phase 2)

**DECEMBER RELEASE**
- Relevance Improvements
- DB Recommender Improvements
- Topic Explorer – Relevance and User Control Improvements
- OBI Analytics

- March 2016
- June 2016
- August 2016
- December 2016
Summon Relevance – Highlights

Controlled Vocabulary Boost and Query Expansion Improvements
New Algorithm with Improved Subject Term Boost and better query expansion

Status

General

• Tested 6 variations of the Summon ranking algorithm with boosting on Subject Terms
• Identified candidate with improved performance and no obvious negative effects
• Increase influence of subject terms matching without degrading known item searches
• Expanded the query expansion data set using LCSH variants for each subject heading

Coming Next

• Citation Query improvements
Database Recommender Improvements

Expanded Database Coverage

Ability to promote any database based on rights, tag word matching, and relevance based on results

Status

General
• All Databases now available for recommendation
• Improved matching: Better handling of punctuation, capitalization, and spacing

Bug Fixes
• BestBets no longer dropping tags

Coming Next

• UI improvements
• Expanded management controls, such as number of resources displayed and UX controls
Improved Relevance

Improvements to term and phrase matching and another resource for Topic Explorer

Status

General

• More intuitive matching based on the number of terms in a search phrase and the number of words matched
• Addition of JapanKnowledge reference content

Coming Next

• Improved UX with Better Administration Controls based on feedback from August Release
Replacement of Current Analytics
Introduction of new, state of the art analytics platform

Status

General
• System begins tracking production activity December 15; reports available end of January
• Will replace current analytics and will capture new data, such as facet usage for future expansions to reporting
• Urchin data for 2016 will still be available via the Admin Console

Coming Next
• Rollout of reporting
• Expanded actions available for reporting
Rollout of OBI Reporting

- Tracking from OBI will officially replace Urchin Reporting January 1, 2017
  - Allows for continuity of reporting within calendar years
  - Provides 15 day review period for data in production environment beyond current QA
  - Tracked Urchin and OBI data will overlap

- Reports available beginning of February 2017
  - System needs time to collect data
  - We will provide documentation and training in January to coincide with first month’s worth of data collection
OBI Reporting

Action Usage Searches example

Compound Layout

Narrative
Searches

Graph

Searches

Counts

Add to Briefing Book

Selection Steps
Summon and Alma

Update on Integration Efforts
Summon Integration with Alma

Currently in Implementation with Our First Customer
Available for 2017 Implementations

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

Unified management & discovery of resources
End-to-end resource delivery & fulfilment
Integrated and advanced patron services
3 Major Elements

1. **Services page**
   - Display of patron account data from Alma
   - Customizable page that shows items checked out, holds, fines, etc.

2. **Publish catalog data**
   - Alma will “publish” new and changed records from the Alma bibliographic database to Summon
   - Records are then processed via the Summon Index Update

3. **Rights management for e-resources**
   - Replace 360 Client Center with Alma
   - Client center and customizations embedded in Alma
   - Single activation – a new path to activate in both automatically
How have we improved Quality Assurance?

Improvements in Quality Assurance

Process, System, and Communication Changes
Recent Issues with Releases and Production Environment

• **Bugs and Disruptions in Service**
  • Broken links due to proxy issues and load balancer
  • Mobile support had issues with latest version of iOS
  • Search widgets broken
  • Some translations not working

• **No preview or sandbox environment**
  • Prevents ability to test site customizations
  • Timing of release made transition to new changes difficult
  • Better training and documentation needed

• **Configuration issues in October**
  • UI configurations toggled between custom and default states for logos and colors
  • Caused by restart of UI server during routine maintenance; reverted configuration file to its default state
Actions Taken

• Move of data center to Ex Libris Cloud is complete
  • Recent issues are unforeseen consequences of infrastructure and process improvements
  • Result is:
    • Improved monitoring and response time
    • Recreation of systems and processes identified areas for improvement

• QA Improvements
  • Performance improvements due to load testing using Player Piano
  • Increased automation of UI testing
  • Additional proxy testing in place using common customer configuration
  • Increased coverage for mobile OS
Actions Taken: Improved Support Processes

• Recent creation of training videos

• New Escalation Process—clear process; one email for all issues SummonSupportEscalation@exlibrisgroup.com

• New position in Customer Support to monitor and ensure quick resolution of specific customer issues, questions and bugs

• Integration of Summon into Ex Libris SalesForce
Reminder: Ex Libris System Status Page

• Any issues affecting availability will be reported here:
  • [http://status.exlibrisgroup.com/](http://status.exlibrisgroup.com/)
• Subscribe to email alerts
• Includes notifications of any maintenance or issues with Search index Update
Update: Preview Environment

- **A Preview of the “Preview” environment**
  - Currently in process for review in December
  - Release should be available via Preview link on December 1
  - Provides visibility of release with your configuration
    - UI customizations in place
    - Production index with your rights configured
    - Linking rules in place

- **Will follow up with instructions on how to view and provide feedback**
  - Preview will be to provide feedback on the preview environment itself as well as the release candidate
What’s the plan for 2017?

Status on 2017 Roadmap
2017 Summon Roadmap

- In the process of sizing and scoping potential features for inclusion
  - Have initial recommended dates from Summon PWG
  - Now sizing effort of top candidates for inclusion
  - Will review roadmap draft with PWG and publish

- Other Coming Soon:
  - Updating Summon API documentation and moving it into the Dev Network
  - Ideas Exchange for Summon
How can we get involved?

Summon Product Working Group

What It Is and How to Get Involved
Summon / 360Link Product Working Group

• Focuses on Summon and 360 Link

• User Groups
  • ELUNA and IGeLU have specific Summon and 360Link Tracks
  • Smaller regional groups focus on Summon Specific issues

• Monthly meetings with product management
  • Ensures regular communication and transparency
ELUNA Call for Presenters

• **Where:** the Renaissance Schaumburg (Schaumburg, IL)
• **When:** Tuesday, May 9 – Friday, May 12, 2017
• **Submit your proposal**
  • [https://proposalspace.com/calls/d/670](https://proposalspace.com/calls/d/670)
  • Please complete your proposal submissions by January 14, 2017
  • Speakers will be notified of their proposal acceptance in late January
  • All sessions are 45 minutes long, and may be presented by an individual or a group of presenters.
  • All presenters will receive a $100 discount on their registration. (Registration will open in March 2017.)
Questions?
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