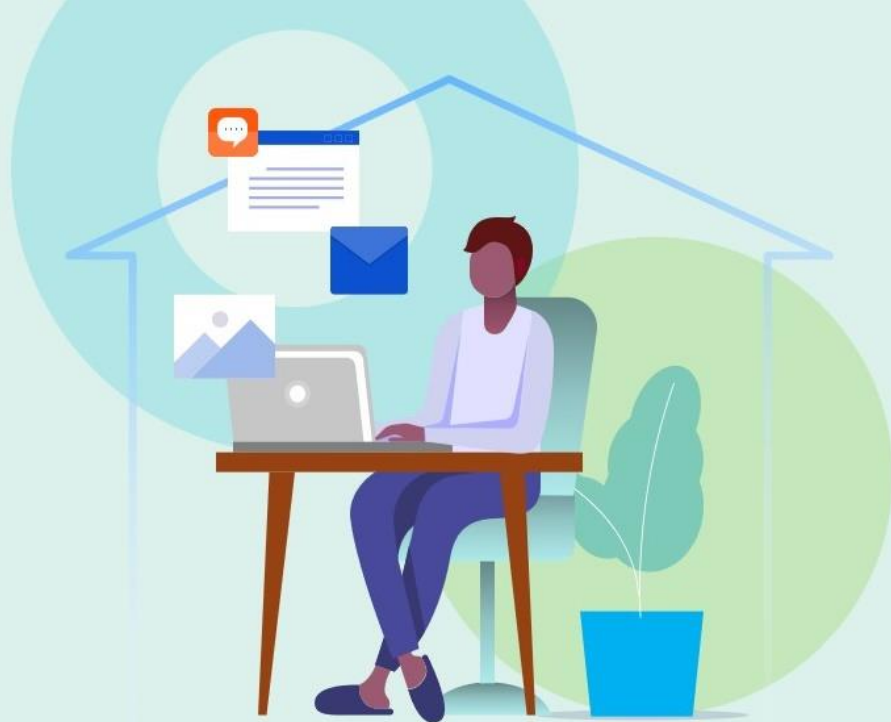
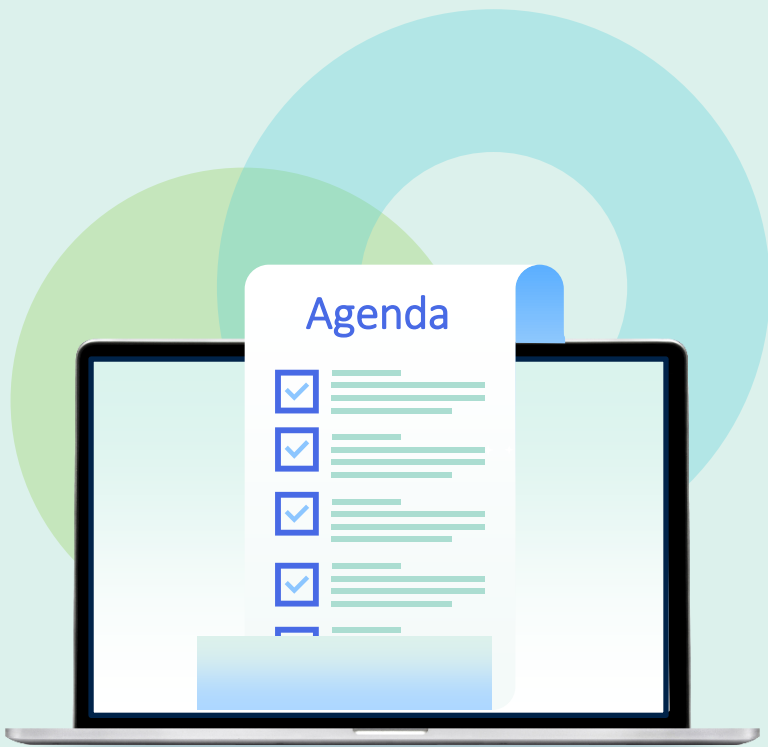


# The New Summon Experience

A Refreshed User Interface with Optimized Usability  
Brent D. Cook | Director, Product Management, Summon





- Let's Look Back at Where We've Come From
- Developing the New Summon Experience
  - How we determined focus areas
  - User testing
  - Key areas for improvement
- Preview Feedback
  - Current list of issues
  - Categorization of issues
- Next Steps
  - Preview update
  - December Release
  - February Release
- Reminder: New UI will use HTTPS



# Let's look back at where we've come from...

# 2009: Introducing Summon

The screenshot displays the University Library Summon search interface. At the top, the University Library logo is on the left, and navigation links for Feedback, About, and Help are on the right. A search bar contains the term 'Biotechnology', with a 'Search Library' button and a link to 'Advanced Search'.

Below the search bar, a message states: 'Search Results: Your search for **'Biotechnology'** returned **2,376** results'.

On the left side, there is a 'Refine your Search' section with three main categories:

- Format:** Includes checkboxes for 'Items with full text online', 'Limit to items from scholarly publications, including peer review', and 'Add results beyond your library's collection'. Under the 'Format' dropdown, 'Any' is selected, with other options like 'Journal Articles (2030)', 'Newspaper Articles (1234)', 'Books (1181)', 'Ebooks (48)', and 'Dissertation (43)'.
- Subject:** Includes checkboxes for 'Any', 'Biotechnology (1872)', 'Biomedical Technology (844)', 'Neurosciences (513)', 'Biochemistry (412)', and 'Biophysics (190)'.
- Publication Date:** Includes a checkbox for 'any' and a bar chart visualization.

The main search results area displays a list of items. The first item is a book titled 'Molecular biology and biotechnology: a guide for students' by Ian W. Sutherland. A 'Preview' window is open over this item, showing its abstract and availability. The abstract states: 'The review focusses on the use of genetic techniques to manipulate bacteria that are important to the dairy industry. Both classical and molecular approaches have been used to improve strains involved in yoghurt and cheese production. Examples are provided of methods for, increasing efficiency of substrate conversion, regulating the production of flavour enhancing metabolites and developing starter cultures.' The availability is listed as 'Hyperlink: 10.1080/10255840802078030'.

Below the preview, the full record for the book is shown, including the title, author, year (1990), publisher (Cambridge University Press), and availability ('Smith Library, checked in').

The second item is a journal article titled 'Characterization and expression of the coat protein-coding region' by Rodoni BC, Dale JL. It is from 'Biotechnology Advances Volume 12, Issue 4, 1998, Pages 625-633'. The abstract states: 'The review focusses on the use of genetic techniques to manipulate bacteria that are important to the dairy industry.' The availability is listed as 'Full text online; Smith Library, on shelf'.

The third item is a book titled 'Beyond biotechnology: the barren promise of genetic engineering' by Craig Holdrege. It is from 'Lexington, KY: University Press of Kentucky, 2008'. The availability is listed as 'Medical Library, reserve'.

At the bottom right, a small tooltip says 'To save results, drag items onto this folder' with a 'Saved Items (0)' button.

# 2013: An Upgrade to Summon 2.0

The image displays two screenshots of the Summon 2.0 library search interface, illustrating the upgrade in 2013.

**Left Screenshot: Search Results for "democracy formation"**

- Search Bar:** "democracy formation" with a search button.
- Results:** 356,725 results sorted by relevance.
- Left Sidebar (Refine Your Search):**
  - Any** (selected)
  - Full Text Online
  - Scholarly & Peer-Review
  - Peer-Review
  - Library Catalog
- Content Type:**
  - Any** (selected)
  - Book / eBook
  - Journal Article
  - Newspaper Article
  - Dissertation/Thesis
  - Book Review
  - More...
- Discipline:**
  - Any** (selected)
  - history & archaeology
  - political science
  - economics
  - social sciences
  - languages & literatures
  - More...
- Publication Date:** A bar chart showing the distribution of publication dates.

**Search Results:**

- Government Formation in Parliamentary Democracies** by Martin, Lanny W, Stevenson, Randolph T. American Journal of Political Science, 01/2001, Volume 45, Issue 1. Research on government formation in parliamentary democracies is replete with theoretical arguments about why some coalitions form while others do not. Unfortunately, this theoretical richness has not led to the development of an empirical tradition that... importance of competing the...  
Journal Article: [Full Text Online](#) (Cited by 105 (Web of Science))
- FORMATION OF E-DEMOCRACY IN MODERN RUSSIA** by Sadchikova Anastasiya Sergeevna. Sovremennye Issledovaniya Social'nykh Problem, 01/2013, Issue 1. The relevance of this article due to the rapid computerization of modern society and the development of e-democracy at the state level...  
Journal Article: [Full Text Online](#)
- State formation and democracy in Latin America, 1810-1900** by López-Alves, Fernando. 2000. Book: [Check Availability](#) 321.009809 L864s
- Coalition Formation in Non-Democracies** by ACEMOGLU, DARON; EGOROV, GEORGY; SONIN, KONSTANTIN. Review of Economic Studies, 10/2008, Volume 75, Issue 4. We study the formation of a ruling coalition in non-democratic societies where institutions do not enable political commitments...  
Journal Article: [Full Text Online](#) (Cited by 10 (Web of Science))

**Right Sidebar:**

- Read Online** | **Cite** | **Email**
- Government Formation in Parliamentary Democracies** by Martin, Lanny W, Stevenson, Randolph T. Research on government formation in parliamentary democracies is replete with theoretical arguments about why some coalitions form while others do not. Unfortunately, this theoretical richness has not led to the development of an empirical tradition that... importance of competing the...  
Cited by: 105  
Source: American Journal of Political Science  
Publication Title: American Journal of Political Science  
Publisher: University of California Press  
Volume: 45  
Issue: 1  
Date: 01/2001  
ISSN: 0014-1801  
EISSN: 1467-9892  
Subjects: Political Science  
Pages: 105  
Language: English

**Right Screenshot: Search Results for "text mining"**

- Search Bar:** "text mining" with a search button.
- Results:** 423,846 results sorted by relevance.
- Left Sidebar (Refine Your Search):**
  - Any** (selected)
  - Full Text Online
  - Scholarly & Peer-Review
  - Peer-Review
  - Library Catalog
- Content Type:**
  - Any** (selected)
  - Book / eBook
  - Journal Article
  - Newspaper Article
  - Dissertation/Thesis
  - Book Review
  - More...
- Discipline:**
  - Any** (selected)
  - engineering
  - history & archaeology
  - economics
  - applied sciences
  - computer science
  - More...
- Publication Date:** A bar chart showing the distribution of publication dates.

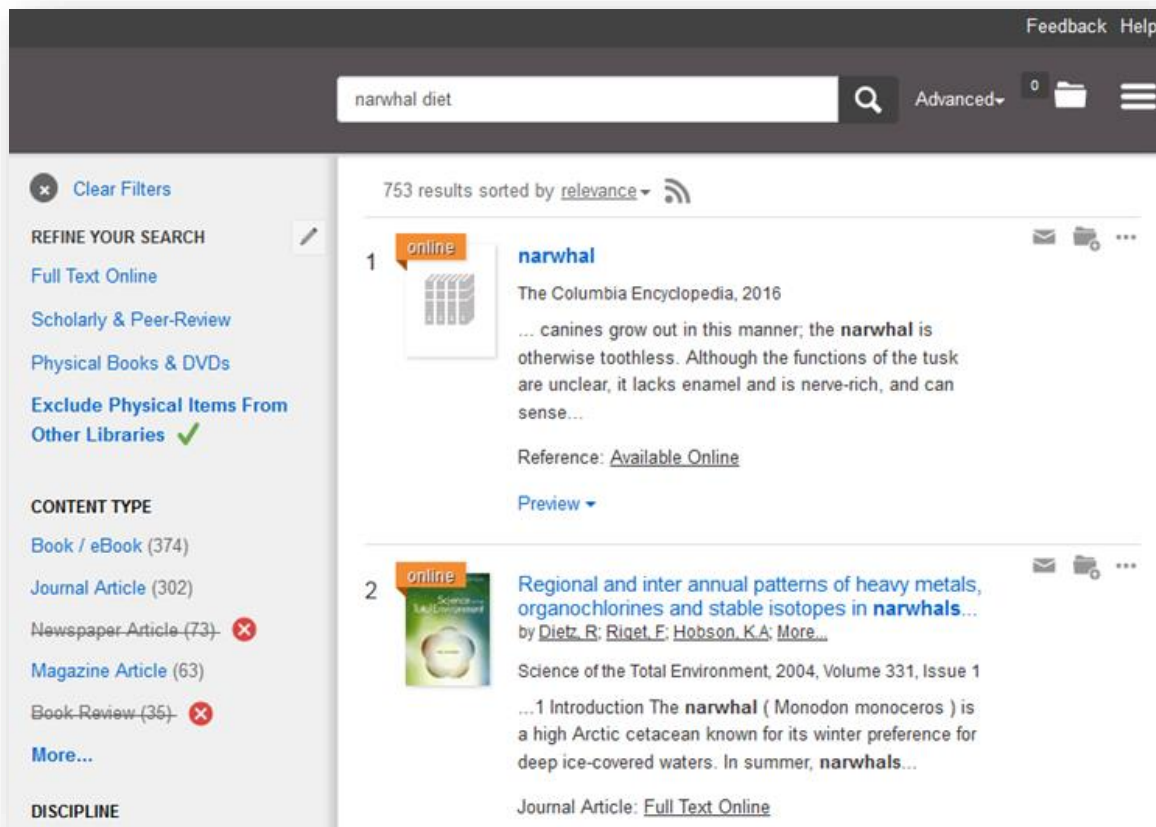
**Search Results:**

- Text Mining** by Blake, C. ANNUAL REVIEW OF INFORMATION SCIENCE AND TECHNOLOGY 2011, Volume 45. Journal Article: [Citation Online](#)
- Text mining with MATLAB: electronic resource** by Bancho, Rafael E. 2013. eBook: [Full Text Online](#)
- Mining text data: electronic resource** by Aggarwal, Charu C, Zhai, Chengliang. 2012. eBook: [Full Text Online](#)
- Text mining application programming** by Kenchady, Manu. Charles River Media programming series, 2009. Book: [Check Availability](#) 005.74 K322. Book: [Full Text Online](#)
- GPU-Accelerated Text Mining: electronic resource** 2009. Published through SciTech Connect. 01/01/2009. Workshop on Exploiting Parallelism using GPUs and other Hardware-Assisted Methods, Seattle, WA, USA, 20090322... eBook: [Full Text Online](#)

**Right Sidebar:**

- Text mining** From Wikipedia, the free encyclopedia. Text mining, sometimes alternately referred to as "text data mining", roughly equivalent to text analytics, refers to the process of deriving high-quality information from text. High-quality information is typically derived through the devising of patterns and trends through means such as statistical pattern learning. Text mining usually involves the process of structuring the input text (usually parsing, along with the addition of some derived linguistic features and the removal of others, and subsequent insertion into a database), deriving patterns within the structured data and finally evaluation and interpretation of the output. High quality in text mining usually refers to some combination of relevance, novelty, and interestingness. Typical text mining tasks include text categorization, text clustering, concept/entity extraction, production of granular taxonomies, sentiment analysis, document summarization, and entity relation modeling (i.e., learning relations between named entities). [Read more](#)
- Suggested Librarian**  
Susan Presley  
[susan.presley@university.edu](#)
- Related Topics**  
[data mining](#)  
[marketing research process](#)  
[exploratory research](#)
- Recommended Research Guides**  
[About Text Analysis - Introduction to Text Analysis](#)  
by Angela Zoss

# 2016: Polishing up Summon 2.0



- Improved facet pane, with exclude functionality
- New toolbar: “Cite” “Save” “Email” and “More Actions” icons in results set
- Preset date ranges for date picker

# 2020: Feature-Rich from Years of Development

The screenshot displays the Summon library search interface. At the top, a purple header bar contains the 'Summon' logo, a search bar with the query 'narwhal diet', and navigation links like 'A-Z List', 'Feedback', and 'Help'. Below the header, the left sidebar offers options to 'REFINE YOUR SEARCH' (Looking for Full Text, Peer-Review, Open Access, Library Catalog, Physical Books in Library Catalog, eBook Full Text Online) and 'CONTENT TYPE' (Journal Article, Newspaper Article, Dissertation/Thesis, Magazine Article, Book / eBook, More...). The main search results area shows 1,577 results sorted by relevance. Three results are visible, each with a thumbnail, title, author, journal information, and a 'Looking for Full Text' link. The right sidebar contains 'Covid-19 Updates', 'Remote Access and Help' (Accessing resources from off-campus), and 'Need help?' (Contact the library staff by email: staff@demolibrary.com, Call the library at (260) 555-1212).

**Summon** A-Z List Feedback Help

New Search Advanced

1,577 results sorted by **relevance** Add results beyond your library's collection

**REFINE YOUR SEARCH**

Looking for Full Text

Peer-Review

Open Access

Library Catalog

Physical Books in Library Catalog

eBook Full Text Online

**CONTENT TYPE**

Journal Article (698)

Newspaper Article (471)

Dissertation/Thesis (134)

Magazine Article (94)

Book / eBook (18)

More...

**LIBRARY LOCATION**

**DISCIPLINE**

ecology (265)

zoology (241)

environmental sciences (201)

biology (170)

geography (137)

More...

**1** 15

**2** 50

**3** 195

**Covid-19 Updates**

Find up to date information about Coronavirus (COVID-19) from the CDC [HERE](#).

**Remote Access and Help**

**Accessing resources from off-campus**

All library digital resources are available both on and off-campus, 24 hours a day.

**On campus:** no log-in required.

**Off-campus:** when opening a database, e-book, or other resource, you'll be prompted to log into the library's proxy server. Use your regular campus login to gain access.

**Need help?**

Contact the library staff by email: [staff@demolibrary.com](mailto:staff@demolibrary.com).

Call the library at (260) 555-1212.

# 2021: The New Summon Experience

The screenshot displays the Summon search interface. At the top, the 'Summon' logo is on the left, and navigation links 'A-Z List', 'Feedback', and 'Help' are on the right. A search bar contains the text 'narwhal diet'. Below the search bar, there are links for 'Options' and 'New Search'. The main content area shows 1,577 results, sorted by 'relevance'. Three results are visible:

- 1** **Fatty acids and stable isotopes ( $\delta^{13}\text{C}$  and  $\delta^{15}\text{N}$ ) reveal temporal changes in **narwhal** (*Monodon monoceros*) diet...**  
by Watt, Courtney A; Ferguson, Steven H  
Marine mammal science, 01/2015, Volume 31, Issue 1  
...—2011 we examined **diet** using fatty acids,  $\delta^{15}\text{N}$ , and  $\delta^{13}\text{C}$ , in **narwhals** from Baffin Bay (BB...  
**Journal Article** [Direct link to PDF](#) [Full Text Online](#)  
[Preview](#) [Cites / Cited by](#) [Related Articles](#) [WEB OF SCIENCE](#) 15
- 2** **WINTER FEEDING INTENSITY OF **NARWHALS** (*MONODON MONOCEROS*)**  
by Laidre, K. L; Heide-Jørgensen, M. P  
Marine mammal science, 01/2005, Volume 21, Issue 1  
... constituted the **narwhal diet**. In fall, *Gonatus fabricii* was the only prey item observed. In late fall and winter, Greenland halibut...  
**Journal Article** [Full Text Online](#)  
[Preview](#) [Cites / Cited by](#) [Related Articles](#) [WEB OF SCIENCE](#) 50
- 3** **Summer **diet** of the **narwhal** (*Monodon monoceros*) in Pond Inlet, northern Baffin Island**  
by Finley, K. J; Gibb, E. J  
Canadian journal of zoology, 12/1982, Volume 60, Issue 12  
[Preview](#) [Cites / Cited by](#) [Related Articles](#) [WEB OF SCIENCE](#) 143

On the left side, there is a 'Refine your search' section with checkboxes for 'Full Text Online', 'Peer-Review', 'Open Access', 'Library Catalog', 'Physical Books in Library Catalog', 'eBook Full Text Online', and 'Add results beyond your library's collection'. Below this is a 'Content Type' section with a 'Filter list' and a table of content types and counts:

Content Type	Count
Journal Article	698
Newspaper Article	471
Dissertation/Thesis	134
Magazine Article	94
Book / eBook	18

At the bottom left, there are sections for 'Library Location' and 'Discipline', each with a dropdown menu and a 'Sort' button. On the right side, there are sections for 'Upcoming Events', 'Library Policies', and 'New York Public Library'.



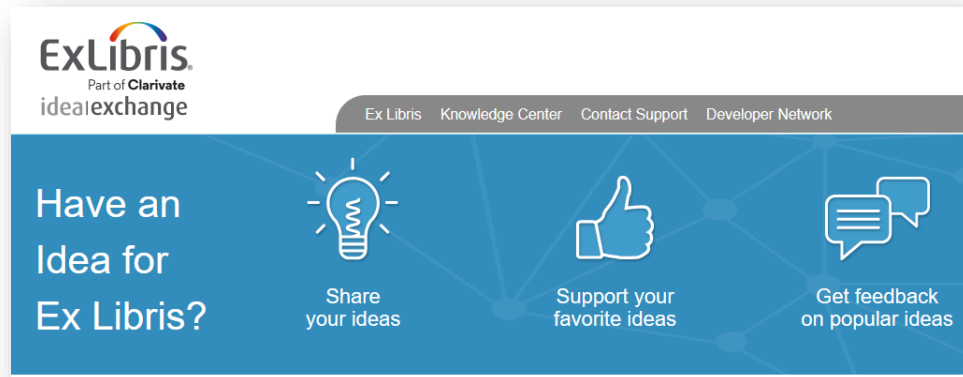


# Developing the New Summon Experience

Using feedback and user testing to identify key areas for improvements

# How We Determined Focus Areas

- We used direct feedback to determine the initial scope for testing and improvement
- Inputs include:
  - Idea Exchange
  - Support tickets
  - Accessibility testing
  - Usage statistics



And direct feedback from you and your patrons!

# Areas for Exploration

1. Use of facets, including interactions with More Facet Pane
  2. Organization of information on the search results page, specifically focusing on brief results
  3. Access to content, both physical and electronic
- All areas must meet accessibility requirements

# User Testing: Methods and Purpose

## Approach

### Learn the current state

How people do research  
How people use Summon



### Identify needs & opportunities

What people need  
What can be improved



### Design solutions

Based on known needs

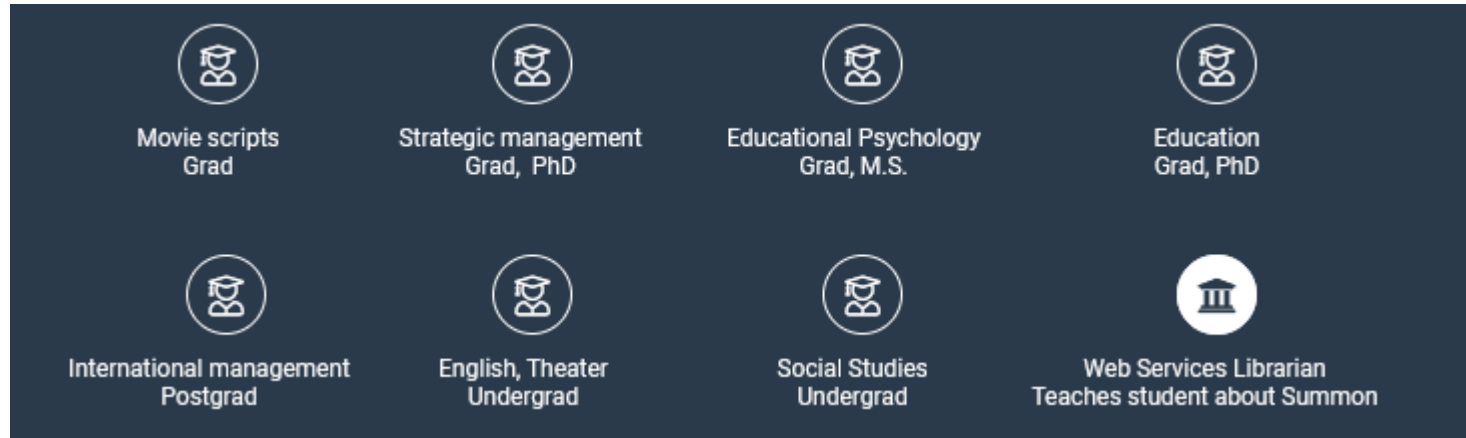


### User test

To see if solution works

# User Testing: Learn Current State and Identify Needs

- Interviews with 8 Summon users while they interact with Summon
- Evaluate specific tasks using Summon: filter - exclude, bulk email
- 7 people are currently enrolled in an academic program

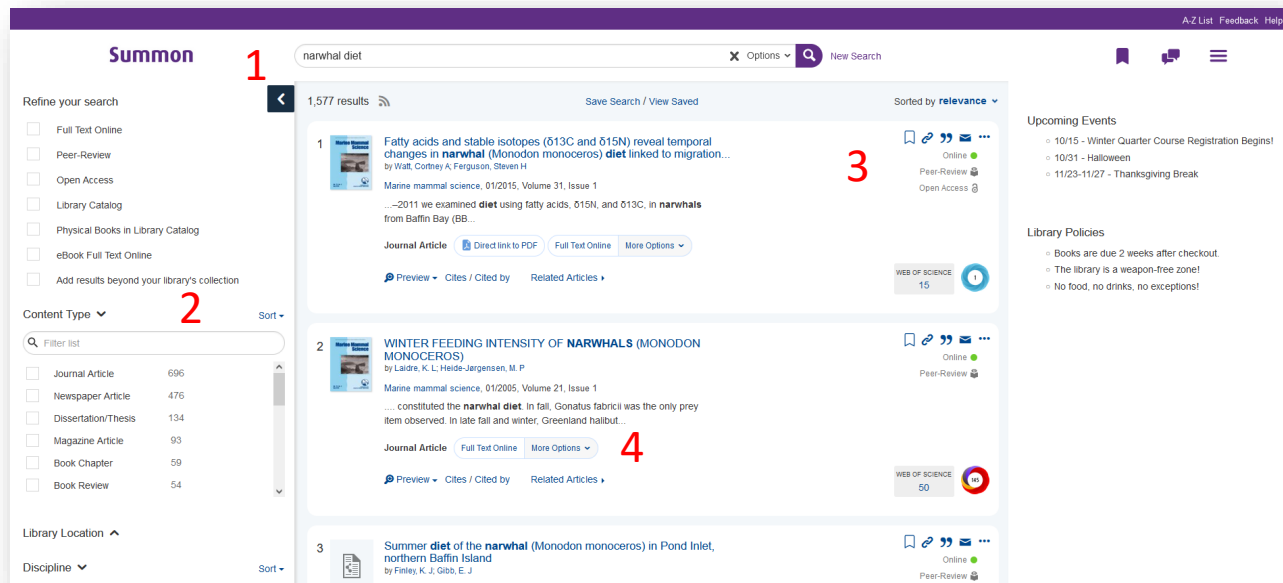


# User Testing: Overall Findings

- Users don't spend much time learning the tool
- Users do what they are used to or what they have been taught
- Common focus on recent sources, sources related to a specific discipline, reputable sources (journals, peer reviewed), and sources with full text
- Finding indicators can be challenging; spread throughout result
- Exclude functionality and More Facet Pane not easily discoverable or used

# The “New” Summon Experience: 4 Key Aspects

1. Stylistic updates
2. Facet Improvements
3. Brief result display improvements
4. Link display



# Summon Results Page: Before

A-Z List Feedback Help

Summon

narwhal diet



New Search



Advanced



1,577 results sorted by [relevance](#)

☐ Add results beyond your library's collection



1



Fatty acids and stable isotopes ( $\delta^{13}\text{C}$  and  $\delta^{15}\text{N}$ ) reveal temporal changes in **narwhal** (*Monodon monoceros*) **diet** linked to migration patterns

by [Watt, Courtney A.](#); [Ferguson, Steven H.](#)

Marine mammal science, 01/2015, Volume 31, Issue 1



...—2011 we examined **diet** using fatty acids,  $\delta^{15}\text{N}$ , and  $\delta^{13}\text{C}$ , in **narwhals** from Baffin Bay (BB...

Journal Article [Looking for Full Text](#)

[Preview](#) [Direct link to PDF](#) [Cites / Cited by](#) [Related Articles](#)

WEB OF SCIENCE

15



2



WINTER FEEDING INTENSITY OF **NARWHALS** (*MONODON MONOCEROS*)

by [Laidre, K. L.](#); [Heide-Jørgensen, M. P.](#)

Marine mammal science, 01/2005, Volume 21, Issue 1



.... constituted the **narwhal diet**. In fall, *Gonatus fabricii* was the only prey item observed. In late fall and winter, Greenland halibut...

Journal Article [Looking for Full Text](#)

[Preview](#) [Cites / Cited by](#) [Related Articles](#)

WEB OF SCIENCE

50



3



Summer **diet** of the **narwhal** (*Monodon monoceros*) in Pond Inlet, northern Baffin Island

by [Finley, K. J.](#); [Gibb, E. J.](#)

Canadian journal of zoology, 12/1982, Volume 60, Issue 12



Stomach contents of 73 **narwhals** (*Monodon monoceros*) taken in Pond Inlet during June to September 1978–1979 were examined. Arctic cod (*Boreogadus saida*...

Journal Article [Looking for Full Text](#)

[Preview](#) [Cited by](#) [Related Articles](#)



## Covid-19 Updates

Find up to date information about Coronavirus (COVID-19) from the CDC [HERE](#).

## Remote Access and Help

### Accessing resources from off-campus

All library digital resources are available both on and off-campus, 24 hours a day.

**On campus:** no log-in required.

**Off- campus:** when opening a database, e-book, or other resource, you'll be prompted to log into the library's proxy server. Use your regular campus login to gain access.

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Call the library at (260) 555-1212.

## REFINE YOUR SEARCH

Looking for Full Text

Peer-Review

Open Access

Library Catalog

Physical Books in Library Catalog

eBook Full Text Online

## CONTENT TYPE

Journal Article (698)

Newspaper Article (471)

Dissertation/Thesis (134)

Magazine Article (94)

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More...

## LIBRARY LOCATION

## DISCIPLINE

ecology (265)

zoology (241)

environmental sciences (201)

biology (170)

geography (137)

More...



# Summon Results Page: After

A-Z List Feedback Help

Summon

narwhal diet

X Options Q New Search



## Refine your search

- ☐ Full Text Online
- ☐ Peer-Review
- ☐ Open Access
- ☐ Library Catalog
- ☐ Physical Books in Library Catalog
- ☐ eBook Full Text Online
- ☐ Add results beyond your library's collection

## Content Type

Sort

Filter list

- ☐ Journal Article 696
- ☐ Newspaper Article 476
- ☐ Dissertation/Thesis 134
- ☐ Magazine Article 93
- ☐ Book Chapter 59
- ☐ Book Review 54

## Library Location

## Discipline

Sort

1,577 results

Save Search / View Saved

Sorted by relevance

- 1  **Fatty acids and stable isotopes ( $\delta^{13}\text{C}$  and  $\delta^{15}\text{N}$ ) reveal temporal changes in **narwhal** (Monodon monoceros) **diet** linked to migration...**  
by Watt, Courtney A; Ferguson, Steven H

Marine mammal science, 01/2015, Volume 31, Issue 1

...—2011 we examined **diet** using fatty acids,  $\delta^{15}\text{N}$ , and  $\delta^{13}\text{C}$ , in **narwhals** from Baffin Bay (BB...

Journal Article

 Direct link to PDF

Full Text Online

More Options

 Preview

Cites / Cited by

Related Articles




Online

Peer-Review

Open Access

WEB OF SCIENCE  
15



- 2  **WINTER FEEDING INTENSITY OF **NARWHALS** (MONODON MONOCEROS)**

by Laidre, K. L; Heide-Jørgensen, M. P

Marine mammal science, 01/2005, Volume 21, Issue 1

.... constituted the **narwhal diet**. In fall, *Gonatus fabricii* was the only prey item observed. In late fall and winter, Greenland halibut...

Journal Article

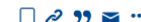
Full Text Online

More Options

 Preview

Cites / Cited by

Related Articles



Online

Peer-Review

WEB OF SCIENCE  
50



- 3  **Summer **diet** of the **narwhal** (Monodon monoceros) in Pond Inlet, northern Baffin Island**

by Finley, K. J; Gibb, E. J



Online

Peer-Review

## Upcoming Events

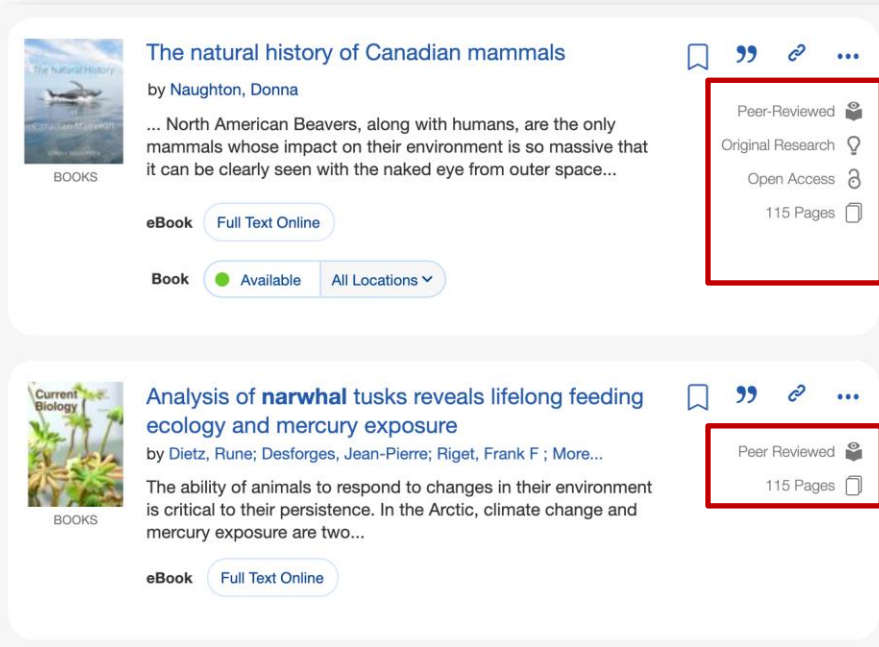
- 10/15 - Winter Quarter Course Registration Begins!
- 10/31 - Halloween
- 11/23-11/27 - Thanksgiving Break

## Library Policies

- Books are due 2 weeks after checkout.
- The library is a weapon-free zone!
- No food, no drinks, no exceptions!

# Design Challenges and Goals: Unified Indicators

- User Need: Identify materials that might relevant
- Challenge: Display search results to simplify scanning and identifying relevant material

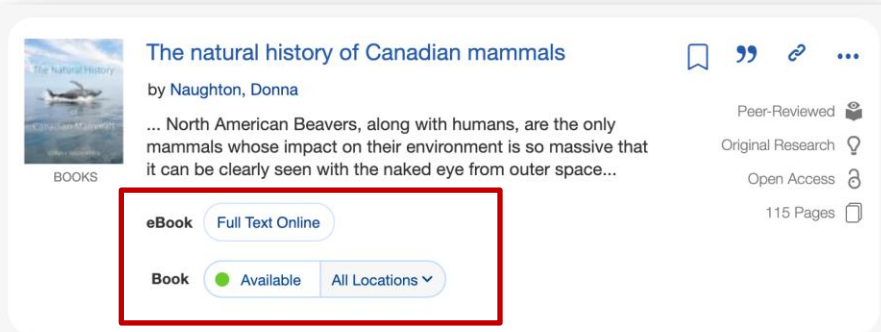


## New Design

- Indicators such as peer-reviewed, original research, page number, etc. are displayed together in a consistent location
- Number of pages gives users an idea about time investment

# Design Challenges and Goals: Full Text Controls

- User Need: Easily get full text
- Challenge: Provide a clear path to get full text



## New Design

- A single primary control to get full text or PDF
- Other paths are presented as secondary options

## BEFORE

- Multiple paths to full text

# Design Challenges and Goals: Physical Item Availability

- User Need: Easily see if a book is available at any location
- Challenge: Provide a quick to tell when and where the item is available

<b>Book</b>		
<div><div><div>● Available</div><div>All Locations ^</div></div></div>		
Location	Call number	Availability
MSU Main Library	BF77.7 .P83 2010	● In library use
Health Science Library	BF77.7 .P83 2010	⊗ Checked out

## New Design

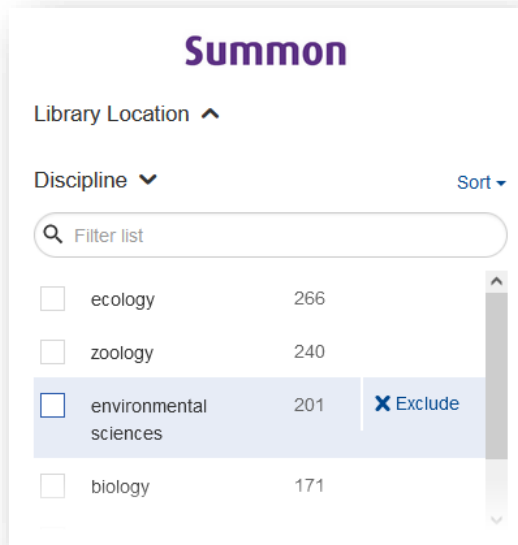
- A single primary control to request item
- Other paths are presented as secondary options

## BEFORE

- Link with text could get lost in brief result

# Design Challenges and Goals: Filters / Exclude

- User Need: Eliminate materials that don't match research need
- Challenge Provide an easy way to exclude items matching certain facets



## New Design

- Exclude options are displayed directly for a facet without going to a more panel
- Facets are searchable directly from the initial facet list

## BEFORE

- Many option is only available in More pane

# User Test: Prior to Development and Preview

## Methods

- Unmoderated user study using userzoom.com to validate designs
- Six to nine participants in each review; 2:1 undergraduate to graduate
- Areas of study include Nursing, Economics, Journalism, History, Science, Business Administration, Technology management, Computer Science, Education, and Computer Engineering
- Participants interacted with a prototype

# The results?

- We've executed the design, with some modifications required due to development needs
- We've tested the release and deployed to Preview

And you've provided feedback!





# Preview Feedback

Current issues and status



# Thanks to Everyone for Your Feedback

- All feedback is important!
- Prioritization isn't meant to discount the importance of addressing all appropriate issues, only to acknowledge capacity and timing for delivery of improvements

# Next Steps for Your Feedback

- The following is provided for guidance and is not a comprehensive list of all open items
- Focus is on system-wide feedback
  - Issues limited to a specific instance of Summon or related to individual customizations not included in this webinar
  - These issues are being tracked and addressed
- Proposed solutions are dependent on development and successful QA testing

# Current Issues: Prioritization

1. Functionality from current UI not working in new UI or new UI functionality not behaving as designed
  - These items should be fixed prior to release
2. Preferred improvements—functionality is working as designed and intended but could be improved
  - Will fix as many of these items as possible prior to release
  - Benefit and implementation possibilities may need review
  - There may be alternative workarounds or options for customization
  - Alternatively, these items can be deferred to a later release
3. Additional functionality or configurations for working features
  - Will be included where possible and appropriate

# The Green Dot: An Example

1



online

Fatty acids and stable isotopes ( $\delta^{13}\text{C}$  and  $\delta^{15}\text{N}$ ) reveal temporal changes in **narwhal** (*Monodon monoceros*) **diet** linked to migration patterns

by [Watt, Courtney A](#); [Ferguson, Steven H](#)

Marine mammal science, 01/2015, Volume 31, Issue 1

PEER-REVIEW

OPEN ACCESS

...—2011 we examined **diet** using fatty acids,  $\delta^{15}\text{N}$ , and  $\delta^{13}\text{C}$ , in **narwhals** from Baffin Bay (BB...

Journal Article [Looking for Full Text](#)

Preview

 Direct link to PDF Cites / Cited by

1



Fatty acids and stable isotopes ( $\delta^{13}\text{C}$  and  $\delta^{15}\text{N}$ ) reveal temporal changes in **narwhal** (*Monodon monoceros*) **diet**...

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...—2011 we examined **diet** using fatty acids,  $\delta^{15}\text{N}$ , and  $\delta^{13}\text{C}$ , in **narwhals** from Baffin Bay (BB...

Journal Article [Direct link to PDF](#) [Full Text Online](#)

Preview

 Cites / Cited by Related Articles

Online

Peer-Review

Open Access

WEB OF SCIENCE

15

1

2



Whales, dolphins, & porpoises: a natural guide

by [Berta, Annalisa](#), editor

2015

The eighty-nine cetacean species that swim our seas and rivers are as diverse as they are intelligent and elusive, from the hundred-foot-long, two-hundred-ton...

Book

Available

Preview

# Current Issues

## 1. Functionality from current UI not working in new UI or new UI functionality not behaving as designed

- ✓ Performance issues
- ✓ Availability for Physical items/Call Numbers / Call Numbers not displaying; size of button
- ✓ Full text online displaying for records that are not full text
- ✓ STACKMAP Integrations
- ✓ All Links: duplicate links and not showing all links
- ✓ DB Recommender CSV download empty

# Current Issues

## 2. Preferred improvements—functionality is working as designed and intended but could be improved

- ✓ Overlap in Bookmark, Chat and Hamburger Menu
- ✓ Different colors for links and icons
- ✓ Availability link color different from other links
- ✓ Gap caused by online icon in mobile
- ✓ New terms translations (Available)
- ✓ Adjust number of copies label (x)
- ✓ Placement and format of Query Expansion
- ✓ Facets jump to the top
- ✓ Displaying location value
- ✓ Peer-Reviewed Icon shouldn't be plural
- ✓ Color of PDF button is different
- ✓ Search box too short/improve Saved Search visibility
- ✓ Width/length of custom panels; background color for custom panel column
- ✓ New features translated
- ✓ External LibKey integration appears as link and not as text
- ✓ Custom colors for new elements (include/exclude indicators, new background colors, publication date facet)
- ✓ Icons overlap with text in News spotlight
- ✓ Green Dot in multiple places

# Current Issues

## 3. Additional functionality or configurations for working features

- ✓ Selected facets at the top should be configurable
- ✓ Ability to order facets in Refine Your Search / scrollbar
- ✓ Results pane too small on smaller screens
- ✓ Change default sort for facets
- ✓ Move language feature out of hamburger menu
- ✓ Can we change the shape of the expanded availability button? Open button looks collapsed
- ✓ Feedback on Advanced Search pane, preview pane or other existing functionality



# Next Steps

What to expect in Preview and upcoming releases



# Preview and the December Release

- An update will be posted to Preview this week
  - I will post a notice to the listserv when the update is live
  - We will include as many improvements as possible beginning with top priority issues
- Production Release goes live for all December 15
  - May include some smaller fixes not seen in Preview
  - Will only go live if all major issues are resolved

# Beyond the December Release

- Any appropriate issues not included will be addressed as soon as possible
  - Most improvements will be included in the February 2022 Quarterly Release
  - Some may come in maintenance releases as is needed
- Additional changes and improvements currently scheduled for August 2022

# Didn't See Your Issue

- Some items may be in process but were not included in this presentation
- Did you submit a ticket via the Support Center?
  - Your issue is being tracked and will be addressed and prioritized appropriately
- Did you post it to the listserv or email it directly to Brent?
  - Be sure to open a support ticket

# Submitting Feedback

- Visit <https://support.proquest.com/> and click on “Submit a Case” in the toolbar at the top of the site.
- In the form, enter the following:
  - **Platform/Service:** Ex Libris
  - **Select your asset:** Summon
  - **Case Type and Priority:** Set the case type and priority to what you think is appropriate (it’ll get to the correct team based on the first two selections)
  - **Subject:** Please include “Preview UI Feedback” at the beginning of the subject; feel free to add more of a description after that
  - **Description:** In the description, please indicate that this is feedback on the new UI, and if possible provide links to the search results, expected behavior, actual behavior and if appropriate, steps to recreate the issue.
- If you’ve already submitted a case and done something different, don’t worry. We’ll still get your info and process it accordingly.



# HTTPS Forced Redirect for UI

## Reminder of an upcoming change

# HTTPS Required for All Summon Sites

- All HTTP requests redirected to HTTPS beginning December 15
  - Required for ongoing system security
  - Any existing bookmarks or search widgets will redirect to HTTPS
  - Already in place in Preview
- Impact to your site
  - If you've already switched HTTPS redirects on, there will be no change
  - If you do not currently redirect to HTTPS, if some elements on the page are not secure, your end users may get a security warning in their browser



# For Summon API Sites

- This only applies to sites using the Summon native interface
- If you use the Summon API for development of features or web pages, this does not apply to you

# Things to Check for HTTPS Support in Preview

- Check external images or scripts in Best Bets, Custom Panels, Topic Explorer, or other areas you may have modified to ensure all elements are secure

The screenshot displays the Summon library search interface. At the top, a purple navigation bar contains links for 'A-Z List', 'Feedback', and 'Help'. Below this, the 'Summon' logo is on the left, and a search bar contains the text 'library hours'. To the right of the search bar are icons for a star, a close button, a magnifying glass, and links for 'New Search' and 'Advanced'. On the far right of the header are icons for a folder with '0' items, a chat bubble, and a hamburger menu.

The main content area shows '27,267,242 results sorted by [relevance](#)' with a dropdown arrow and an RSS icon. There is a checkbox labeled 'Add results beyond your library's collection'. A green arrow icon points to a result titled 'Library Opening Hours'. The description for this result says 'Visit the opening hours webpage to check when the library is open.' and provides the URL <http://www.school.ac.uk/library/about-us/opening-hours/>.

On the left side, there is a sidebar with the heading 'REFINE YOUR SEARCH' and a pencil icon. It lists several categories: 'Full Text Online', 'Peer-Review', 'Open Access', 'Library Catalog', 'Physical Books in Library Catalog', and 'eBook Full Text Online'. At the bottom of the sidebar is a 'CONTENT TYPE' dropdown menu.

The search results list shows a book titled 'Summer hours at the Robbers Library: a novel' by [Halpern, Sue](#). It is the 1st result. The book cover is visible. The text indicates it is the '2018, First edition.' and begins with '... library"-- For head librarian Kit, the public library in Riverton, New Hampshire, offers what she craves most:'. To the right of the book entry are icons for a link, quote, email, folder, and a more options menu.

On the right side, there are two informational boxes. The top one is titled 'Covid-19 Updates' and contains the text 'Find up to date information about Coronavirus (COVID-19) from the CDC [HERE](#).' The bottom one is titled 'Remote Access and Help' and contains the text 'Accessing resources from off-campus' followed by 'All library digital resources are available both on and off-campus, 24 hours a day.' and 'On campus: no log-in required.'



# Check Your Site for HTTPS support - Production

## Settings

General

Search Results

Logos

Authentication

Facets

Languages

Participant Record Prioritization

Citation Formats

Refworks

Syndetics

Spotlighting

Advanced Search

General

<input type="button" value="CUSTOM"/>	Page Title	Summon Demo Site
<input type="button" value="CUSTOM"/>	Home Link	https://demo.summon.serialssolutions.com/#!/search?ho=t&l=en&q=
<input type="button" value="CUSTOM"/>	Force HTTPS via redirect	ON <input checked="" type="radio"/> Off <input type="radio"/>
<input type="button" value="CUSTOM"/>	Feedback Email Address	demo.account@exlibrisgroup.com
<input type="button" value="DEFAULT"/>	Feedback Client Email Required	OFF
<input type="button" value="DEFAULT"/>	Feedback Link	
<input type="button" value="CUSTOM"/>	Feedback Roles	ON <input checked="" type="radio"/> Off <input type="radio"/>
<input type="button" value="DEFAULT"/>	Help Link	
<input type="button" value="DEFAULT"/>	Enable Rss Icon	ON
<input type="button" value="DEFAULT"/>	DB Recommender Enabled	ON

- This takes 5 minutes to turn on or off
- The option will no longer be available after the December Release



# Questions?

# Thank you!

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