Summon®
Enhanced User Interface

August 2016 Release Overview

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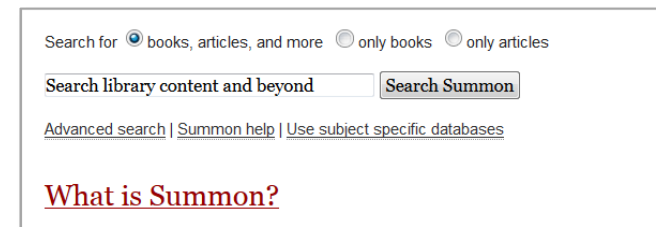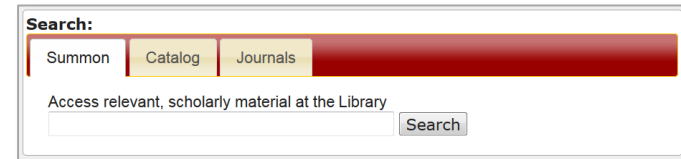
Overview of Enhanced User Interface

- Release date is August 24, 2016
- Affects Summon Home Page and Summon Results Page
- Feedback received from more than 150 customers on proposed user interface changes
- Usability testing conducted by librarians, faculty, and researchers
- Seamless release for existing Summon 2.0 customers

Customer feedback & Usability testing

Release

July 2016

August 2016

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Overview of Enhanced User Interface - Why It's Important
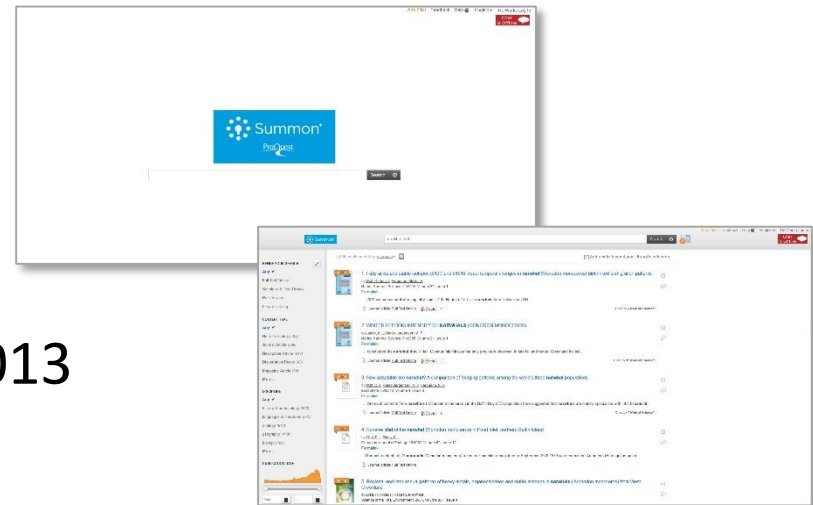
- **A Vital Discovery Tool**
  - ✓ Primary point of resource discovery and access for institutional holdings
  - ✓ Faculty, librarians and students use it
 - ✓ Provides library exposure across the university

- **Customer Requested**
  - ✓ Feedback for increased functionality
  - ✓ More flexible customization options
 - ✓ Previous design launched in 2013 (designed in 2012)

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- **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
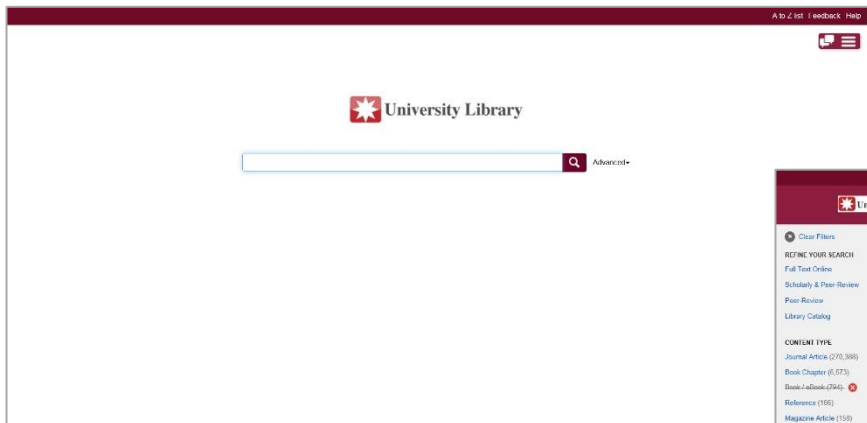 - ✓ Enhances visibility of recommended resources
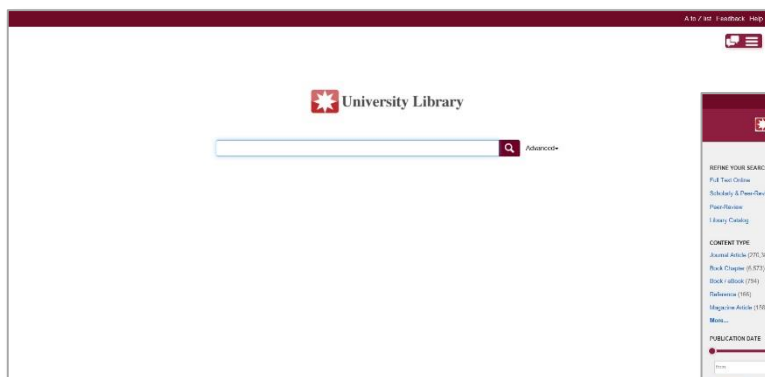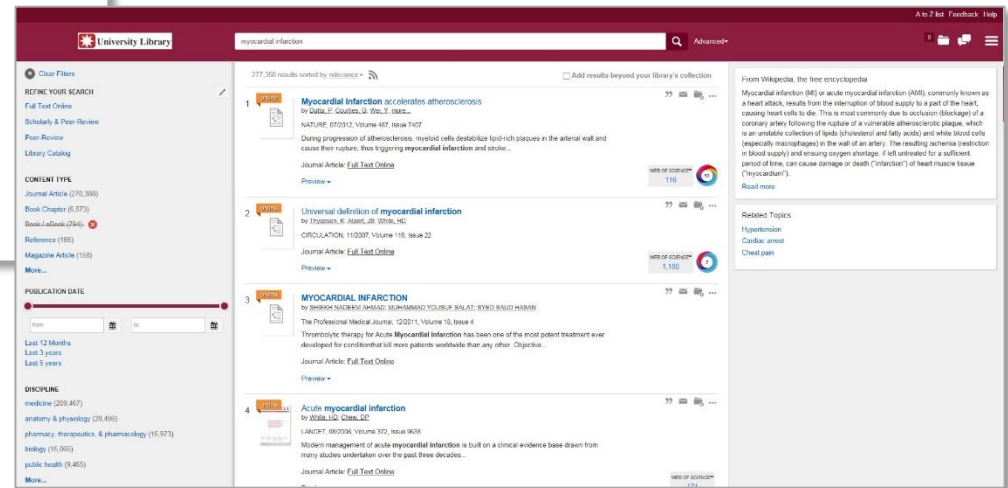

New Summon 2.0 Home Page
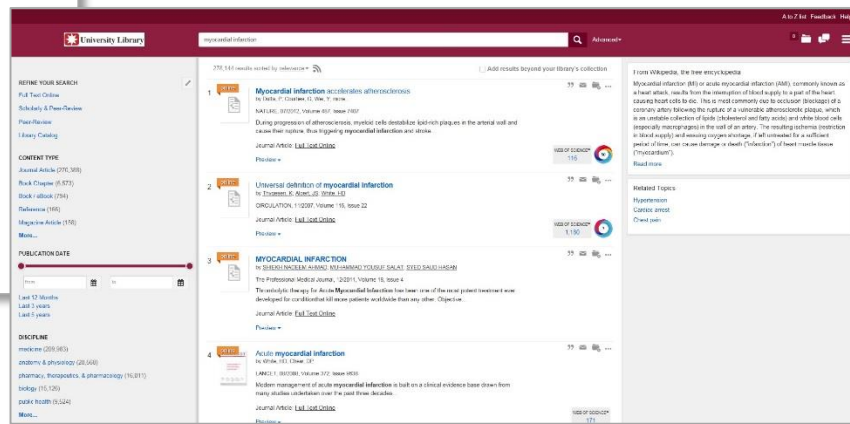
New Summon 2.0 Results Page

Overview of Enhanced User Interface - Logistics

- Refreshed interface goes live on August 24
- *Configuration options from existing interface will be applied to Summon 2.0 instances*
- *No activation required*
- *Enhancements applied to all Summon 2.0 instances (no opt-outs)*

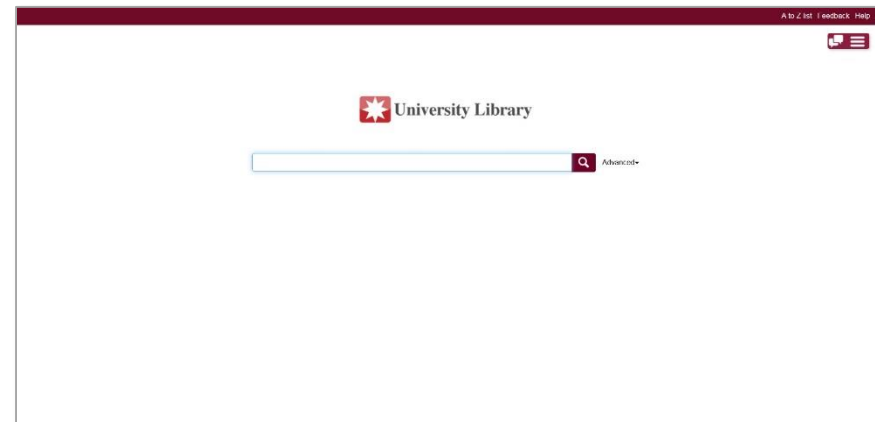**New Summon 2.0 Home Page**

New Summon 2.0 Results Page

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Overview of Enhanced Interface – Summon Home Page

- **Highlights**
  - ✓ Elevated placement of search box to increase prominence
  - ✓ New menu option, icons, and text to improve navigation
  - ✓ Slight font and layout changes to modernize look and feel
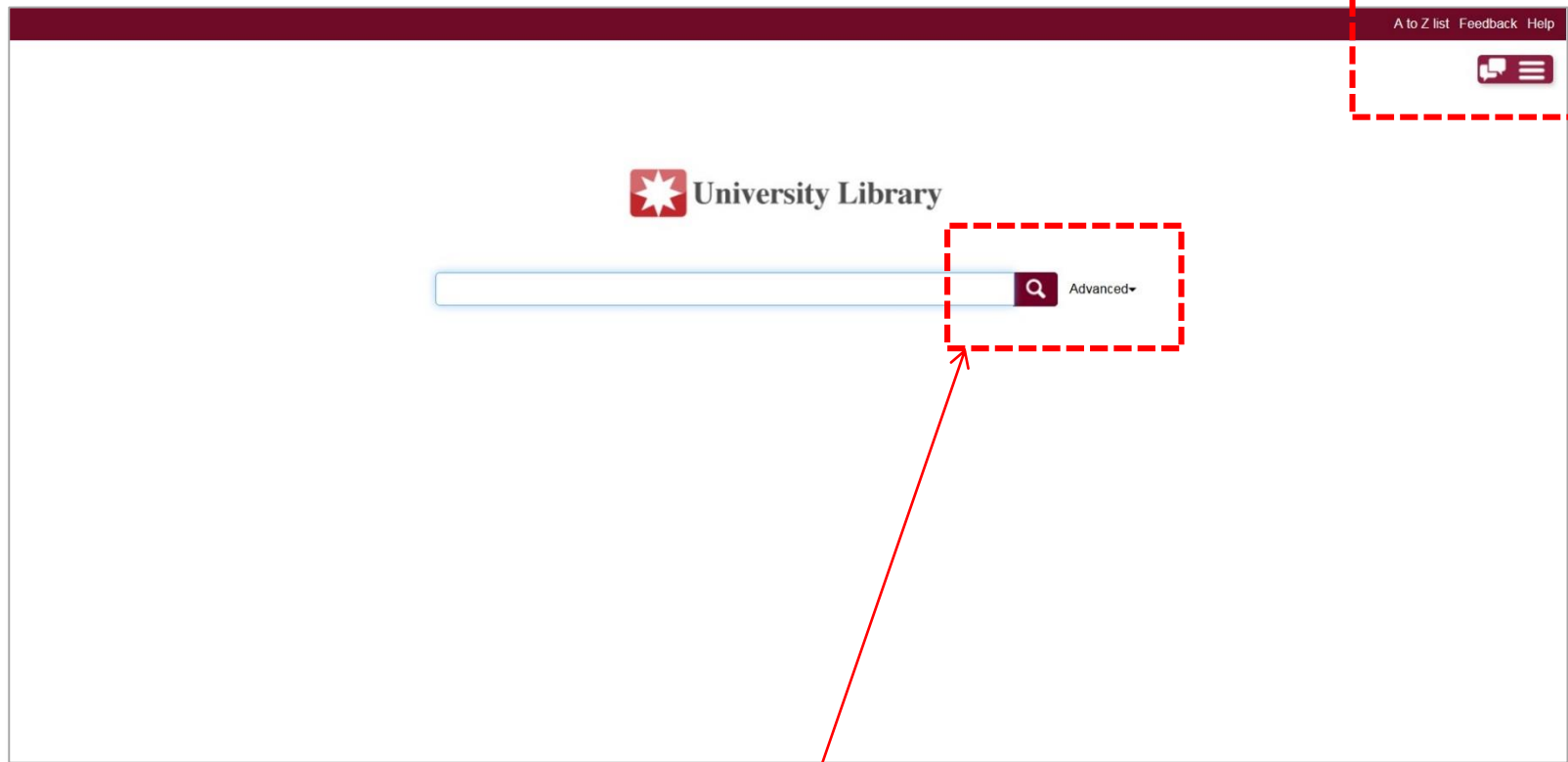

Old Summon 2.0 Home Page

New Summon 2.0 Home Page

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Overview of Enhanced Interface – Summon Home Page

- **Highlights**
  - ✓ New menu bar, chat icon, and dropdown menu
  - ✓ New search icon replaces "search" text
  - ✓ "Advanced" text replaces "gear" icon
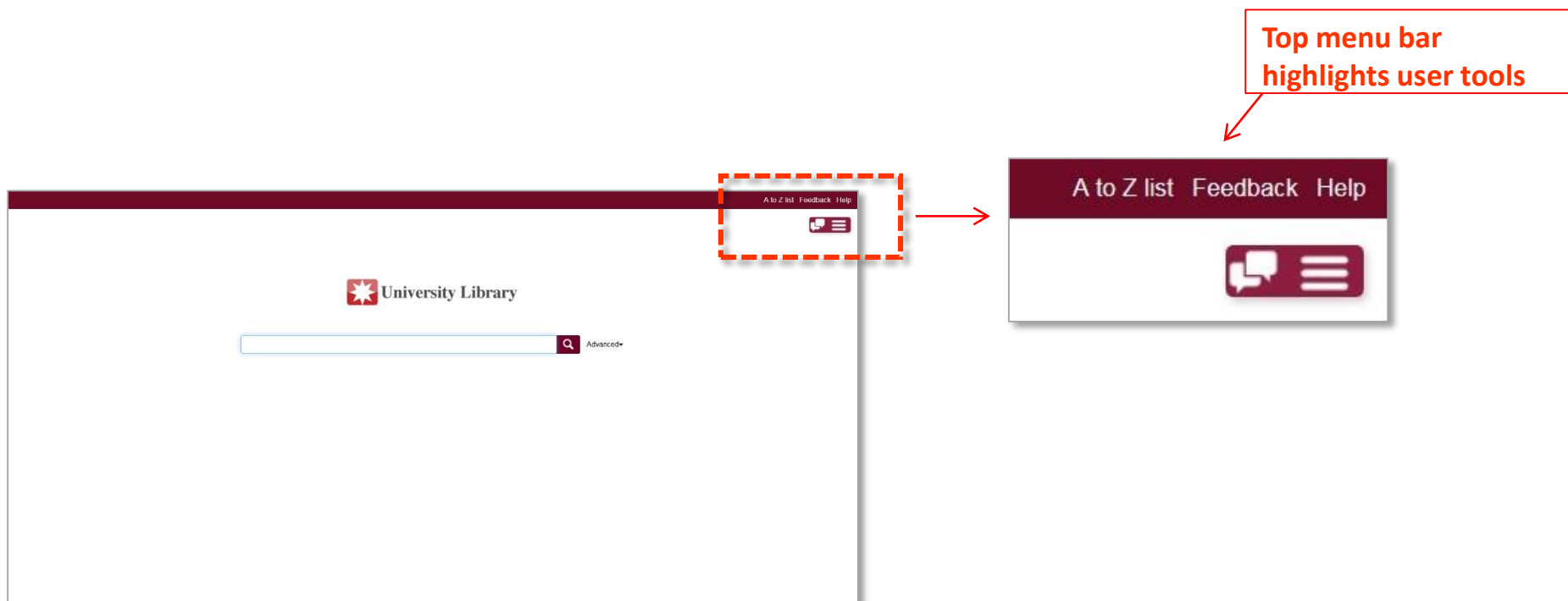

Menu bar, chat icon and dropdown menu

A to Z list   Feedback   Help

⭐ University Library

Advanced▾

Enhanced search options

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- **Highlighting the new Top Menu Bar**
  - ✓ Increases library branding through library-designated color
  - ✓ Highlights several different user tools
    - A-to-Z list, Feedback, and Help

Top menu bar highlights user tools

- **Highlighting the new Dropdown Menu**
  - ✓ Next to chat icon
  - ✓ Applies same behavior currently found in responsive design for tablet and phone
  - ✓ Consolidates several different user tools
    - ▪ A-to-Z, Feedback, Help, Widget Builder, Language Selector, RefWorks login
  - ✓ Opens up in dynamic side panel

Dropdown menu opens up in side panel
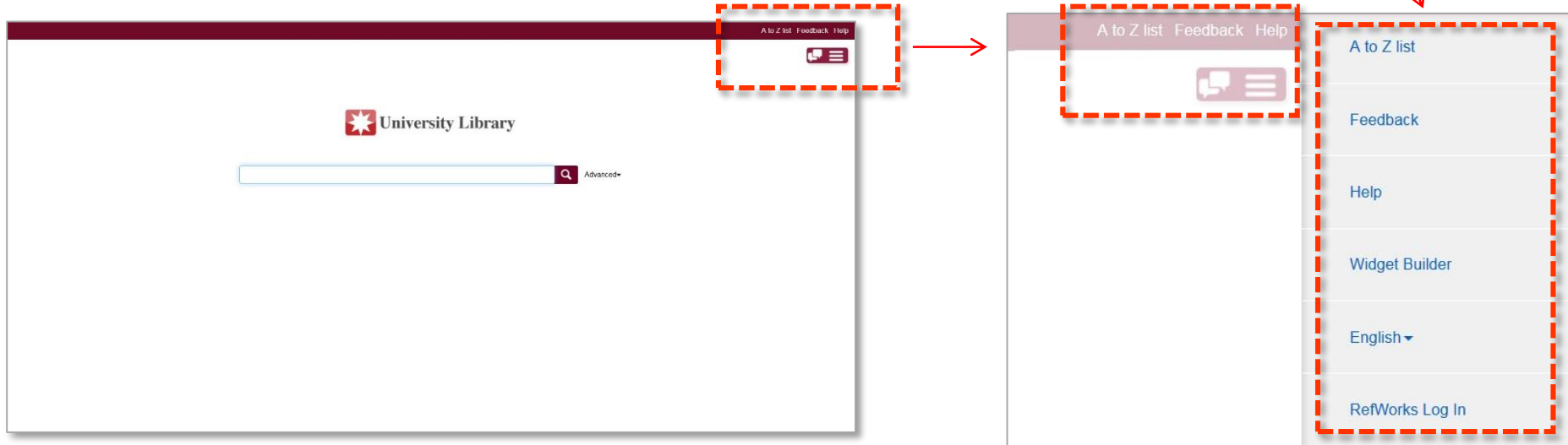
- **Highlights**
  - ✓ Functional elements added and repositioned within the three-panel layout
  - ✓ New menu option, icons, and text to improve navigation
  - ✓ Slight font and layout changes to modernize look and feel

Old Summon 2.0 Results Page

New Summon 2.0 Results Page

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Overview of Enhanced Interface – Summon Results Page

- **Highlights**
  - ✓ Top level: new "advanced" search text, menu bar, icons, and dropdown menu
  - ✓ Facet pane improvements to new exclude option and date selector
  - ✓ Results pane improvements include citation preview, Web of Science linking and display, and "cite", "save", "email" icons
  - ✓ Topic Explorer pane features new layout

Results pane includes more functionality

New menu bar, icons, dropdown menu

Facet pane improved

Topic explorer pane features separated elements

Overview of Enhanced Interface – Summon Results Page

- **Highlighting the new Top Menu Bar Panel**
  - ✓ New menu bar with A-to-Z, Feedback and Help
  - ✓ "Advanced" text replaces "gear" icon
  - ✓ New icons for search, RefWorks/saved folder, and chat
  - ✓ New dropdown menu for different user tools

Features new menu bar, icons, dropdown menu

- **Highlighting the new Facet Pane Improvements**
  - ✓ Exclude can be applied with a click and identified by icon
  - ✓ Publication date features new pre-canned date ranges and removal of date histogram

New exclude

New pre-canned date ranges

- **Highlighting the new Results Pane**
  - ✓ "Cite" "Save" "Email" and "More Actions" icons in results set
  - ✓ Citation "Preview" dropdown available
  - ✓ New location and linking for Web of Science
  - ✓ Altmetrics icon update to reflect type of sources

Action items, Altmetrics, and Web of Science

Preview link is expandable

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- **Highlighting the Topic Explorer Pane**
  - ✓ New layout features separated elements allowing for better identification of recommended resources
  - ✓ Citation preview option along with "cite", "save", "email" and "more actions" abilities removed from pane
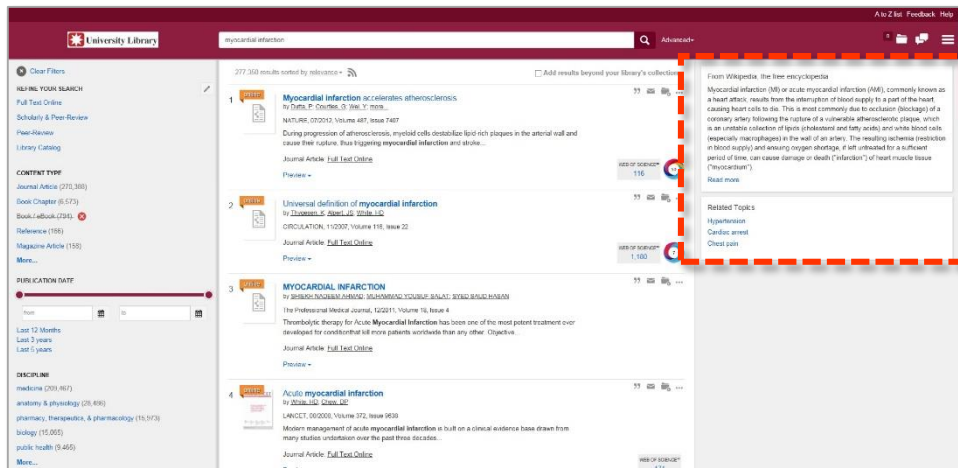
Spacing separates elements within the pane

Key FAQs

Q: When will this change happen?
- Our release is scheduled for August 24.

Q: Will the new Summon changes automatically go live for my end-users on August 24th?
- Yes. Customers using the Summon 2.0 user interface will see a refreshed user interface on this date.

Q: Can we preview changes before activating?
- No. A preview option is not available.

Q: What about custom scripts that I have implemented?
- We recommend that you check your custom scripts after the release.

Q: Do existing configuration options transfer to the enhanced Summon UI?
- Yes. All the configuration options that you have now should transfer over to the refreshed user interface. Though we recommend that you review your specific configuration options once the release is completed.

Q: Is this change only for the Summon 2.0 interface?
- Yes. This change only affects those that are on the Summon 2.0 interface.

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Comments? Questions?
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