The New Summon Experience

A Refreshed User Interface with Optimized Usability
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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
2013: An Upgrade to Summon 2.0
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
2021: The New Summon Experience
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

1. Learn the current state
   - How people do research
   - How people use Summon

2. Identify needs & opportunities
   - What people need
   - What can be improved

3. Design solutions
   - Based on known needs

4. 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
1. Fatty acids and stable isotopes (δ13C and δ15N) reveal temporal changes in narwhal (Monodon monoceros) diet linked to migration patterns
   by Whip Cuttler & Ferguson, Stewart
   Marine mammal science, 01/2016, Volume 31, Issue 1

2. WINTER FEEDING INTENSITY OF NARWHALS (MONODON MONOCEROS)
   by Lisette M. Haine-Jørgensen, M.D.
   Marine mammal science, 01/2006, 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...

3. Summer diet of the narwhal (Monodon monoceros) in Pond Inlet, northern Baffin Island
   by Peter E.J. Sibb 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...
Summon Results Page: After

1. Fatty acids and stable isotopes (δ13C and δ15N) reveal temporal changes in narwhal (Monodon monoceros) diet linked to migration...
2. WINTER FEEDING INTENSITY OF NARWHALS (MONODON MONOCEROS)
3. Summer diet of the narwhal (Monodon monoceros) in Pond Inlet, northern Baffin Island

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 be 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

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

Fatty acids and stable isotopes (δ13C and δ15N) reveal temporal changes in narwhal (Monodon monoceros) diet linked to migration patterns
by Watt, Cortney A; Ferguson, Steven H
Marine mammal science, 01/2015, Volume 31, Issue 1

...~2011 we examined diet using fatty acids, δ15N, and δ13C, in narwhals from Baffin Bay (BB...}

Whales, dolphins, & porpoises: a new 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...
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
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
Check Your Site for HTTPS support - Production

- 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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