Summon Release Overview

July 2017
Overview of the July 2017 Release

- Release date is July 26
- Preview environment becomes available on July 12
- Includes user interface improvements, new Course Reserve integration feature, and system updates
- Feedback received directly from customers, through Idea Exchange, and coordinated with the Summon Working Group

Customer feedback initiated August 2016
Development Begins March 2017
Release Available July 2017
Overview of Enhancements

• Customer Requested UI improvements
  ✓ Increased exploration through subject terms
  ✓ Accessibility improvements
  ✓ Icon and background color cleanup*
  ✓ More prominent Permalink placement
  ✓ New include-exclude functionality, more intuitive facet navigation and tool tips

• New Alma Integration Feature
  ✓ Expose Course Reserves by enabling search and display*

• System Updates
  ✓ Support updated version of AngularJS
  ✓ Improve Sort by Date
  ✓ Add ability to increase results from 200 to 1000
  ✓ Improve relevance for English search

*not inherited by default, requires configuration and activation
July Release Details
Customer Benefit

- In both the preview pane and the catalog detail page, complete Subject Terms strings are clickable search links that lead to results created by combining individual terms (inherited by default)
User Interface Improvements – Accessibility

Customer Benefits

- Improvements to meet or exceed the Voluntary Product Accessibility Template (VPAT), Web Content Accessibility Guidelines 2.0 (WCAG) (*inherited by default*)

Feature

- Fixed unintended scroll on focus when using arrow between UI panes
- Calendar improvements including calendar slider labeling for Screen Readers and better reading month and year in Calendar widget
- Addressed issue with filter/facet on select going to the bottom of the list
- Improved screen reader support for facet/filter state (selected - unselected – excluded)
- Improved screen reader support for label sort by dropdown
Customer Benefits

- Improvements to increase contrast and visibility within the user interface and to allow for better customizations to meet your branding guidelines *(requires configuration and activation)*

  - Ability to change icon colors in the header
  - Decouple header colors from menu colors
  - Ability to change right hand column to white background
• Advanced search label, icons and menu colors were all connected.
• No option for the header icons; must be white.
• Right-hand column is gray only.
• Advanced search label, icons and menu colors can be set separately.
• Header icons can be assigned a custom color.
• Right-hand column can be gray or white.
## Header and Background Icons—Configuration

<table>
<thead>
<tr>
<th>Summon 2.0 Customization</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Custom Colors</td>
<td>ON</td>
</tr>
<tr>
<td>Primary Link Color</td>
<td>#00088cc</td>
</tr>
<tr>
<td>Primary Link Color (visited)</td>
<td>#00088cc</td>
</tr>
<tr>
<td>Primary Link Color (hover/active)</td>
<td>#0065580</td>
</tr>
<tr>
<td>Secondary Link Color</td>
<td>#3333333</td>
</tr>
<tr>
<td>Secondary Link Color (visited)</td>
<td>#3333333</td>
</tr>
<tr>
<td>Secondary Link Color (hover/active)</td>
<td>#F56c31</td>
</tr>
<tr>
<td>Permalink Color</td>
<td>#333333</td>
</tr>
<tr>
<td>Permalink Color (hover/active)</td>
<td>#333333</td>
</tr>
<tr>
<td>Selected Facet Link Color</td>
<td>#0065a4</td>
</tr>
<tr>
<td>Selected Facet Link Color (hover/active)</td>
<td>#000000</td>
</tr>
<tr>
<td>Authentication Banner Background Color</td>
<td>#850900</td>
</tr>
<tr>
<td>Authentication Banner Link Color</td>
<td>#FF0000</td>
</tr>
<tr>
<td>Authentication Banner Link Color (visited)</td>
<td>#e6e6e6</td>
</tr>
<tr>
<td>Authentication Banner Link Color (hover/active)</td>
<td>#e6e6e6</td>
</tr>
<tr>
<td>Header Background Color</td>
<td>#FF4500</td>
</tr>
<tr>
<td>Header Link Color</td>
<td>#000000</td>
</tr>
<tr>
<td>Header Link Color (visited)</td>
<td>#FF0000</td>
</tr>
<tr>
<td>Header Link Color (hover/active)</td>
<td>#FF0000</td>
</tr>
<tr>
<td>Icons Color (Save, Chat, Hamburger Menu)</td>
<td>#FFFFFF</td>
</tr>
<tr>
<td>Change Third panel background color to white</td>
<td>OFF</td>
</tr>
</tbody>
</table>
Customer Benefits

- Brings permanent link icon forward to make it easier to locate for the end user and more effective by bringing the link forward in the user experience.

- Previously hidden in the preview pane; is now both in the preview section and as an icon with a tool tip at the top of the result.
User Interface Improvements - Preview Pane on Hover

Customer Benefits

- Easier access to details in the preview pane for at-a-glance evaluation of a result

• Maintains previous functionality requiring you click on the Preview link to see the preview inline with the results.
• Adds ability to see preview on hover over the preview icon
Customer Benefits

- More intuitive interactions with the facet panes to allow for easy inclusion or exclusion of facets (*inherited by default*)

Redesigned facet interaction to address the following issues with the Facet Pane:

- Confusion around exclude functionality (the red circle-X) in the primary facet pane—what it is and how to apply
- Confusion over using the include green check mark and the red X exclude functionality in the More Facets pane
- Apply and cancel buttons in the More Facet pane required second apply / click in the primary pane for changes to take place
Faceting—Before

- Clicking on the facet label (such as “Journal Article”) would include the value, and indicate inclusion by bolding the link text and displaying a green check next to it.

- Clicking on the red circle would exclude the value, and indicate exclusion by striking through the text and displaying the red X by the facet.

- Clicking on the Edit pencil icon would allow for selecting multiple values before applying them.
Faceting—After

- Exclude has been moved solely to the More facets pane, greatly simplifying the faceting process in the primary pane.

- Use of the Edit pencil button stays the same.
More Facets Pane—Before

• Clicking on the facet label (such as “Journal Article”) would include the value, indicated by bolding the link text and displaying a green check next to it.

• Clicking on the red circle would exclude the value, indicated by striking through the text and displaying the red X by the facet.

• Clicking on the Apply button would apply all changes.

• Clicking the Cancel X by the Apply button would shift focus to the default Facet pane, where the user would need to either click Apply or the Cancel X a second time to exit out of applying facets.
Faceting—After

- Both check marks for Include and red X’s for exclude are visible and grayed out. Clicking on either will select the appropriate action for the associated value.

- Clicking on the label selects include for that facet.

- Clicking the Cancel X by the Apply button now closes the More Facet pane and clears any changes made during that.
Alma Integration Feature - Course Reserves

Customer Benefits

- Enable search and display of course reserve information through Summon

(only available for Summon over Alma customers, requires configuration and activation)

- Displaying an individual institution's course info on a record in Summon
- Displaying course info on a record in the services page
- Indexing course info and returning results for course keywords in Summon
- Course info facets in Summon

COURSE NAME AND NUMBER

- World History WH101 (23)
- Modern Short Story ENG 413.002 (18)
- Medicine in Ancient Times (II) ANC-MED1702 (7)
- Art History 101 ArtHist101 (5)
- Introduction to Biology BIOL101 (5)
- More...
Customer Benefits

- Move to current version of AngularJS (1.6.4) for most recent improvements and improved security *(inherited by default)*

- Better performance in page rendering, particularly in Internet Explorer

- Note: this upgrade of AngularJS will impact both support of Internet Explorer 8 and SpringShare Chat 1.0
  - IE8 will no longer be supported since it does not support the most recent version of AngularJS
  - SpringShare Chat 1.0 is retiring on Jan. 31, 2018
    - Will no longer be supported, with majority of customers migrated to 2.0 by end of July

Welcome to Springshare Help for v1 Products!

- LibGuides / CMS v1
  - Guides by Topic
  - Update to v2 for FREE
  - v1 Retirement: Jan 31, 2018

- LibAnswers v1
  - Guides by Topic
  - Update to v2
System Update - Sort by Date

Customer Benefit

- Better logic around merging of records to ensure limiting or sorting by date displays more accurate information (*inherited by default*)

- Adjusted rules for merging records to accommodate for date variations based on source of metadata
- Should greatly reduce error cases on date displays

- Note: may not eliminate all use cases
  - Need to balance between deduplication and ensuring dates are used appropriately
System Update - Increase Results from 200 to 1,000

Customer Benefit

- Provide access to records beyond the first 200 (inherited by default)

- Higher limit maintains protection for content displayed and performance of the system, while allowing for greater access

- Can configure system so that incremental loads of infinite scroll results will determine upper limit
Customer Benefit

- Increased sophistication of indexing to allow for better matching and relevance based on real world usage of punctuation, spelling and grammar \textit{\textit{(inherited by default)}}

- Improved handling of punctuation and special characters
- Improved use of synonyms
- Improved stemming
Key FAQs

**Q: When will this change happen?**
- Our release is scheduled for July 26.

**Q: Can we preview changes before activating?**
- Yes. A preview option is available starting on July 12.

**Q: Will these Summon improvements automatically go live for my end-users on July 26?**
- All features are inherited by default within this release, with the exception of the Course Reserve feature for Summon-Alma integration and the icon and background color improvements. Those enhancements require configuration and activation.

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