My library is already providing the legacy Summon interface, where can we learn about the Summon 2.0 interface?

August 24, 2016 Update: This article does not reflect the UI improvements released today (see Summon: Release Notes).

This document has been prepared for those libraries changing to the Summon 2.0 interface from the legacy Summon interface. If your library is new to Summon and your question is whether your library is using the 2.0 interface, a quick way to tell is to view the search box on your Summon results page:

Search box in the Summon 2.0 interface:

![Search box in the Summon 2.0 interface](image)

Search box in the legacy Summon interface (includes links to advanced search and radio buttons below search box):

![Search box in the legacy Summon interface](image)

Each library has a Summon 2.0 preview environment that is configured with their holdings information and customizations. A library can access the dedicated preview site for their library at http://yourlibrary.preview.summon.serialssolutions.com, where "yourlibrary" is the same as the URL prefix of your current Summon site.

To enable Summon 2.0 for your institution, use the Support Portal option menu at the top of this page. The support team will activate the new user interface within 1-3 days. More opt-in information is available below in the Common Questions about Summon 2.0 section.

The rest of this document will explain the following:

- Recorded Presentations and Training Sessions
- Overview of Summon 2.0 Enhancements
- Common Questions about Summon 2.0

Recorded Presentations and Training Sessions

Please see the training webinars about Summon and 360 Services: Discovery: Public Webinars.

Upcoming sessions and previously recorded sessions on Summon 2.0: Transition for Current Summon Clients are available.
Overview of Summon 2.0 Enhancements

Summon 2.0 provides a newly designed interface that is not only optimized for academic research but that is familiar, easy and compelling to use. The below screenshot highlights the three panes in Summon 2.0:

- The left-side pane **Facet pane** (#1 below) for refining search results, including the Discipline facet as a default Facet and the ability to select multiple facets at one time
- The center pane **Results pane** (#2 below) displaying search results, including Automated Query Expansion for enhanced search recall, and Content Spotlighting for enhanced visibility of available source types.
- The right-side **Explorer pane** (#3 below) for previewing expanded metadata about an item, or exploring topical information presented via the Topic Explorer.

A complete list of enhancements provided by the three-paned Summon 2.0 interface:

### Facet pane

- Exclude Newspapers refinement: replaced with Content Spotlighting
- Add Results Beyond your Library’s Collection: moved to Advanced Search
- Default facets now include the Discipline facet
- Cleaner display of facets: some facets collapsed by default, facet counts viewed with mouse-over
- Ability to select multiple facets at one time

### Results pane

- Automated Query Expansion providing enhanced search recall for common topical searches
- Content Spotlighting retains highest visibility for scholarly items and also ensures easy access to reference, newspaper, image content

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Results pane

Sort by Relevance/by Date now displayed alongside count of search results

New icons for Content Types

Enhanced use of full screen: Preview screen and Web of Science citations display on new right-side panel rather than displaying over search results

Infinite scroll instead of paging

Explorer pane

Topic Explorer providing research guidance: topical reference information, suggested librarian, recommended research guides, related searches, related scholars

Right-side pane also used as the Preview screen providing additional metadata about the item

Other enhancements

Advanced Search providing user-selected fields and Boolean operators

Automatic language detection of the browser

Saved Items folder has moved to top of screen

Common Questions

The following is a list of common questions about Summon 2.0. Click a question on this list to jump to that section of this document:

- What do we need to do to turn on the 2.0 interface and features for our users?
- What if we’re not ready to switch to the new 2.0 interface?
- Is there an additional cost for Summon 2.0?
- Will our library’s URL for Summon be changing?
- If we use the API, is anything changing for us?
- Is ProQuest able to provide Summon 2.0 marketing materials?
- How do we learn more about Summon 2.0 features?
- Should I report Summon 2.0 bugs, enhancement requests, and questions any differently than how I report them for the current Summon interface?
- When will the new Summon Administration Console be available?
- Does the 2.0 interface support the same browsers as the legacy interface?
What do we need to do to turn on the 2.0 interface and features for our users?

Consider Summon 2.0 customization options and then turn on Summon 2.0 for your institution!

**Customization**

After viewing the *Summon 2.0: Transition for Current Summon Clients* session (see the above *Recorded Presentations and Training Sessions* section), use the *Customizing Summon for your Library* recorded training session (1 hour 21 minutes) to get a comprehensive view of available options. To jump to a particular topic of interest to you, see the below Webex timestamps next to each topic:

- Introduction to the Summon Administration Console (@00:40)
- Look, Feel, Text, and Translations (@07:00)
- Refinements and Facets (@21:20)
- Integrated Content and Citation Tools (@29:25)
- Connecting with Users and Sharing your Expertise (@39:00)
- Linking to Content (@48:25)
- Reporting (@01:09:50)
- More Ideas (@01:14:05)

A copy of the presentation slides used during the sessions is available [here](#), and the *Customization Checklist* includes links to additional information in the Support Center. Libraries that wish to continue familiarizing themselves with Summon 2.0 functionality in their dedicated preview environment can do so without impacting their live Summon service.

- Note that while customization functionality for the *Topic Explorer* is not yet available in the Summon Administration Console, you can request changes to the priority of sources for the *Summon Topics* feature, as well as make requests to turn individual sources on and off, by using the *Support Portal option mentioned above*. These changes can be requested and made while your Summon 2.0 site is still in preview.

**Turning On Summon 2.0**

To enable Summon 2.0 for your patrons, use the *Support Portal* (accessible from the More Sites drop-down menu above) and the support team will activate the new user interface within 1-3 days.

**What if we're not ready to start using the new 2.0 interface?**

As of September 2, 2016 the legacy Summon interface is no longer being supported, so we encourage you to please contact us to schedule your upgrade as soon as possible.

Almost all Summon customers are now taking advantage of Summon 2.0’s interface improvements, and we hope that your library as well sees the benefits in upgrading.
Is there an additional cost for Summon 2.0?

Just as with all enhancements to the Summon service, there is no additional cost for subscribing libraries. If you have any questions about your Summon subscription, please contact our sales department.

Will our library's URL for Summon be changing?

No, your Summon URL will not change. Once you let us know you want to turn on the new interface for your users, it will be accessible via your current Summon URL “[libraryname].summon.serialssolutions.com.”

If we use the API, is anything changing for us?

Libraries can continue using the same great API. As with the current user interface, the new Summon 2.0 interface is built using our own API. This means that just about all of the great features available in Summon, including new features, are available to API users. Of course, all customers who currently use the API in conjunction with their own custom interface also have access to a preview site to trial the new Summon 2.0 user interface and features.

Is ProQuest able to provide Summon 2.0 marketing materials?

Yes, the below resources are available to help you educate library staff and end users about the new features and enhancements in Summon 2.0:

- **Summon 2.0 Overview PPT** Presentation with screenshots and details regarding the new features and functionality available in Summon 2.0.
- **Summon 2.0 User Guide** Single page user guide with highlights of Summon 2.0 features. [Standard](#) and [customizable](#) versions available.
- **Top 5 Things You Need to Know about Summon 2.0** Single page overview of Summon 2.0 features and functionality.
- **Summon 2.0 Datasheet** - Two page document highlighting ten areas of the enhanced Summon experience.
- **Summon 2.0 LibGuide** - a site providing Summon training for users and for librarians. The LibGuide is available [here](#).

How do we learn more about Summon 2.0 features?

In addition to this Summon 2.0 overview and FAQ document, the [Summon User Guide](#) has been updated to reflect 2.0 enhancements. Updates specific to each release are available in [Summon Release Notes](#).

The [Summon 2.0: Transition for Current Summon Clients](#) training webinar is available, see details and registration links at [Summon and 360 Services: Discovery: Public Webinars](#). Upcoming and previously recorded sessions are available.

- Note that this training session does not cover specific details about Summon 2.0 customization options; the session will point you to a follow-up training session for a comprehensive, detailed view of customization options.
Should I report Summon 2.0 bugs, enhancement requests, and questions any differently than how I report them for the current Summon interface?

Please continue to report bugs, enhancement requests and questions to our Support Team as you would normally do. Best ways to reach Support are by using the Support Portal option menu at the top of this page.

When will the new Summon Administration Console be available?

The Summon 2.0 feature set does not include a new Admin Console. All clients can administer both their current Summon site as well as their Summon 2.0 site from the same settings in the Summon Admin Console. For those of you who wish to customize the priority and/or sources used in the Topic Explorer you can do so by submitting a customization request to the Support team. Customization information available in the Summon Topics document.

Does the 2.0 interface support the same browsers as the legacy interface?

Yes the 2.0 interface essentially does. The list of supported browsers and operating systems does however show older versions of Internet Explorer and Safari no longer being supported in Summon 2.0.