

Customization Options - Facets, Branding, Widgets, and more!

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Objectives



- Summon Customizations and what's available to you.
- Tailoring Facets to your library
- Using the Admin Console to adjust Summon for your institution, what you can change and how
- Using Custom Panels and supported widgets to meet your library's goals

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Customizing Your Libraries Summon

- Many options to customize your site
- Quick & easy changes that enhance your users' experience
- Get familiar with your Summon Administration Console



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Summon – Facets & Refine Your Search

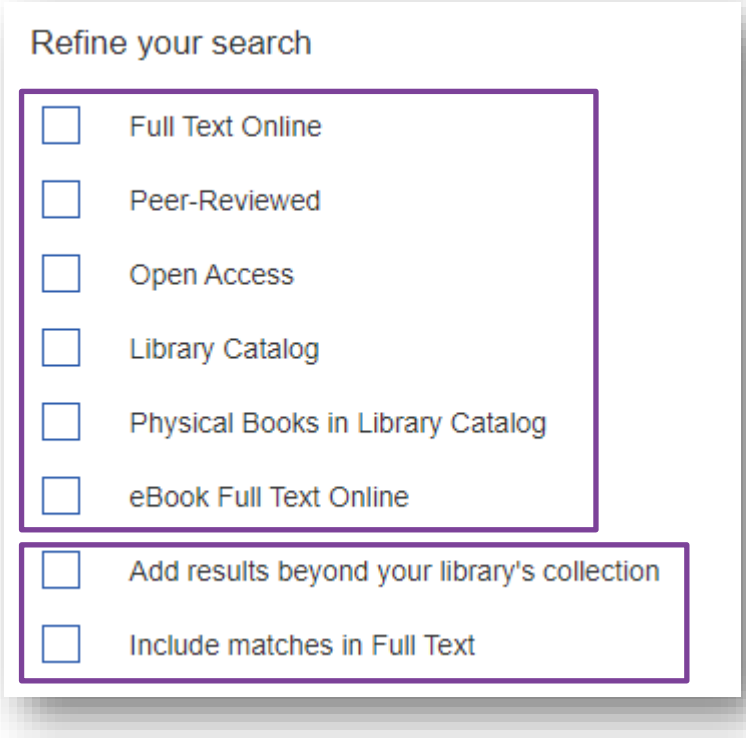
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Facets – Customization Options

- Facets improve your patrons search experience
  - Narrow down search results
  - Expand past your library's collection

- Refine Your Search & Facets
  - Different sections



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Facets – Explore Your Options

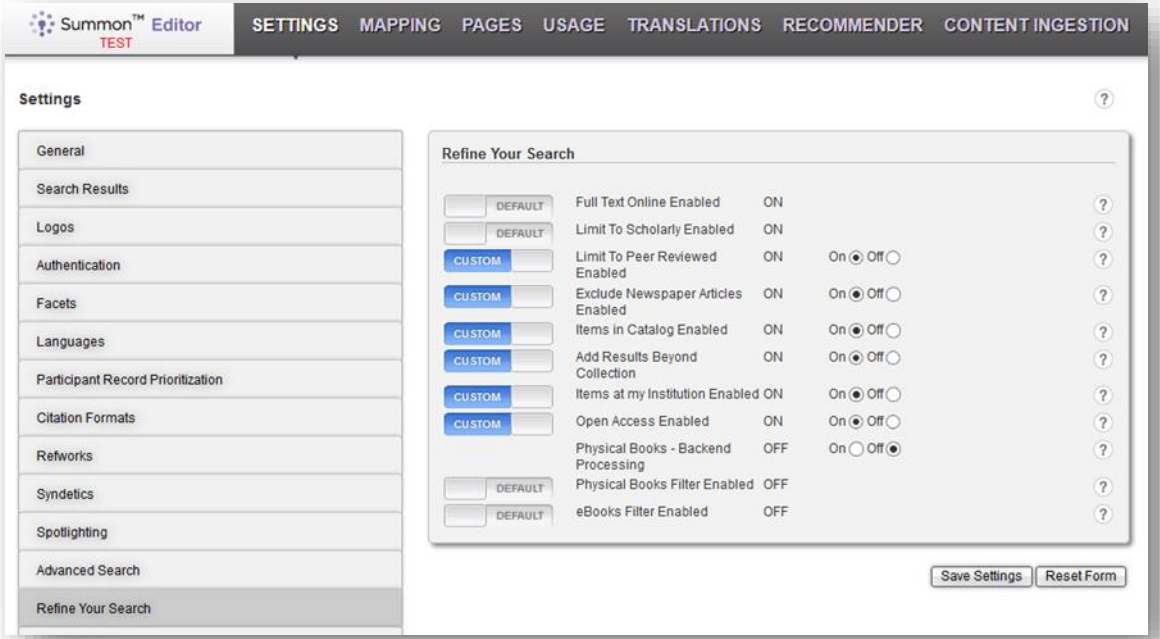
- Refine Your Search
- Content
- Publication Date
- Library Location
- Discipline
- Subject Terms
- Database
- New Records
- Author Language

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Facets – How to Configure

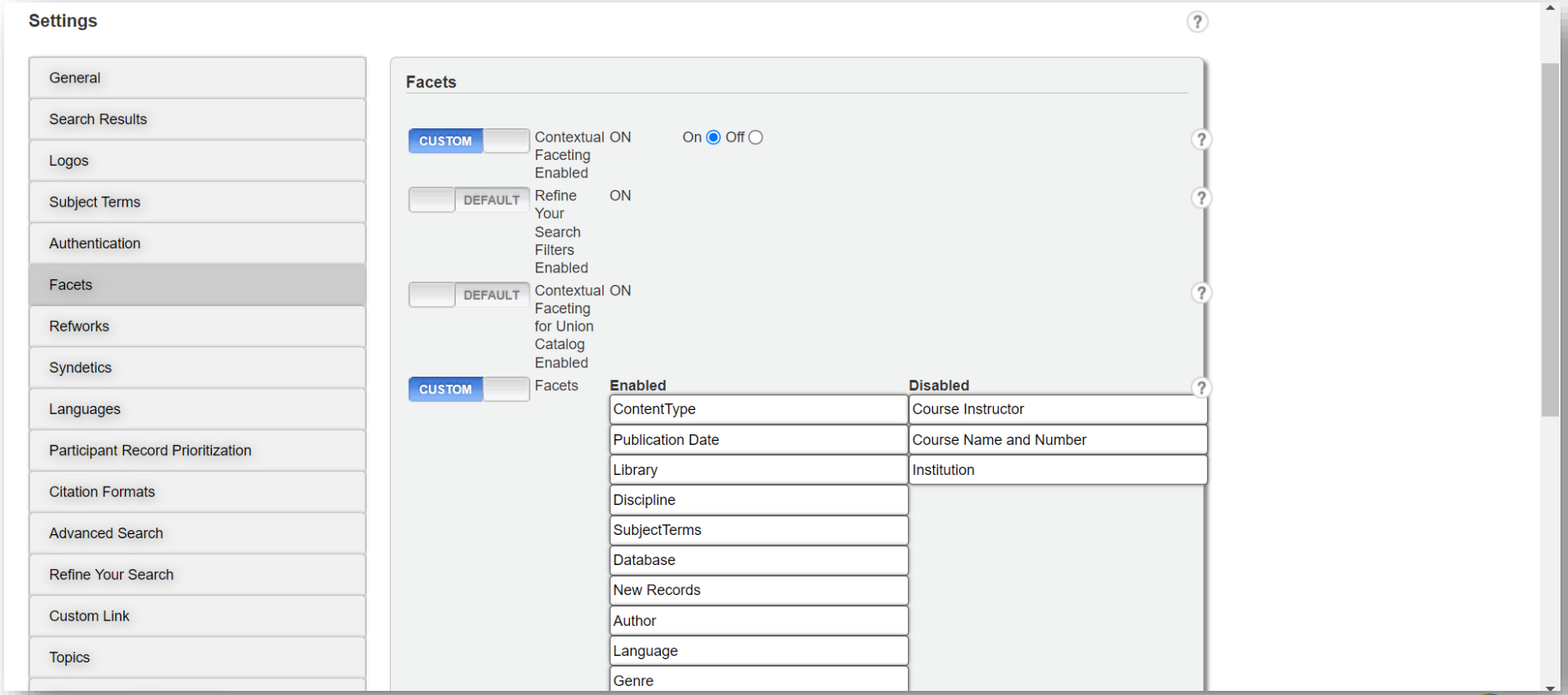
- Configurable in Summon Admin Console
  - Settings > Refine Your Search
  - Enable / Disable facets relevant to your library
  - Ability to re-order facets
  - Re-label facets using the translation tab



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Facets – Re-Order in the Admin Console



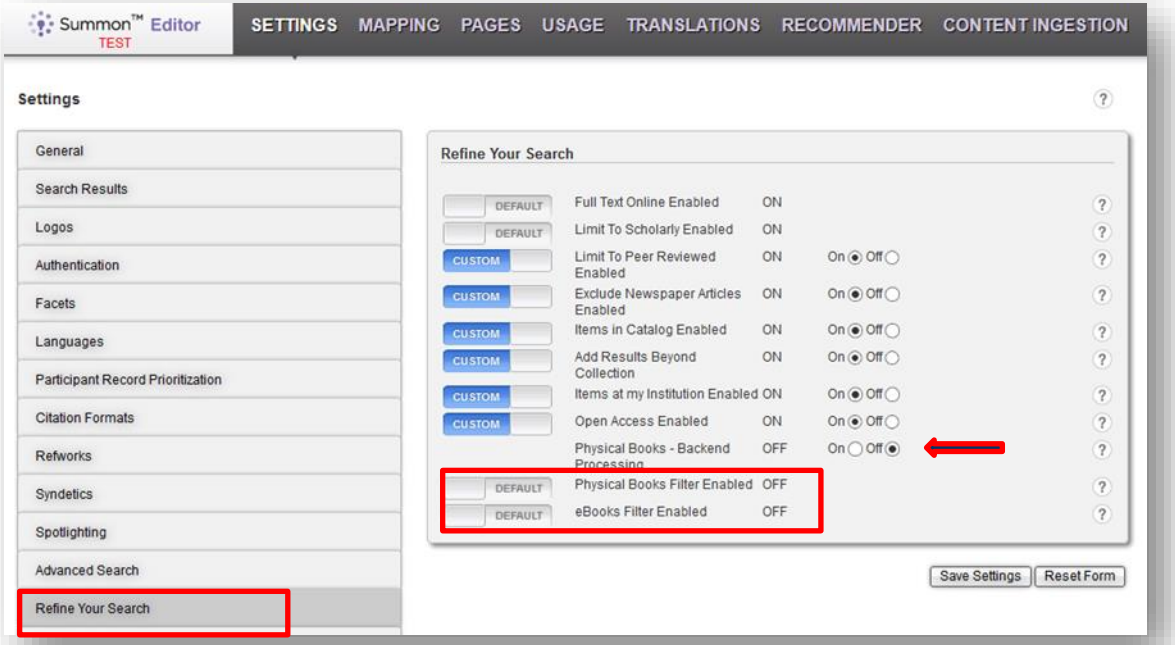
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Facets – New Addition!

- Separate **Physical Books** from **eBooks**
  - Physical Books: will only display physical books in your library catalog
  - eBook: display only eBooks which user has online access to the full-text

- Two Step Activation
  1. Physical back-end processing
  2. Activate the filters to display in summon



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Facets – Recent Improvements

- December 2021 UI refresh
  - Before: Many options are only available in “More” user pane
  - New Design: Exclude options displayed directly for a facet without going to a more panel
  - Facets are searchable directly from initial facet list
  - Better functionality on desktop and mobile

- Configure Summon to expand facets by default
  - Configuring Facets to Expand by default
  - Example: https://ucblibraries.summon.serialssolutions.com/#!/search?ho=t&include.ft.matches=f&l=en&q=

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Summon - Translations Tab

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Translations – Custom Text Editor

- Use the Translations tab to customize text
  - Admin Console > Translations
  - Easy as 1,2,3!
    - Search term you want to change, edit text, save!
    - Changes take ~10 minutes to appear

- Example: Physical Books in Library Catalog → Physical Books

- December 2021 Release:
  - The new features released added to Translations tab



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Summon - Custom Panels

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Custom Panels – Key Tips

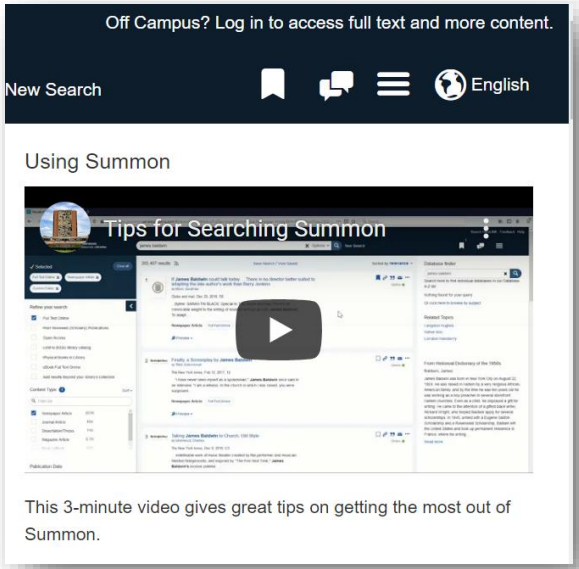
- Use Custom Panels to communicate with users
- Think about the key messages
  - Share tips on accessing resources on/off campus
  - Notice of upcoming library closures/events
  - Embed a library chat widget
  - Offer Virtual Research appointments
- Limit how long you want people to scroll

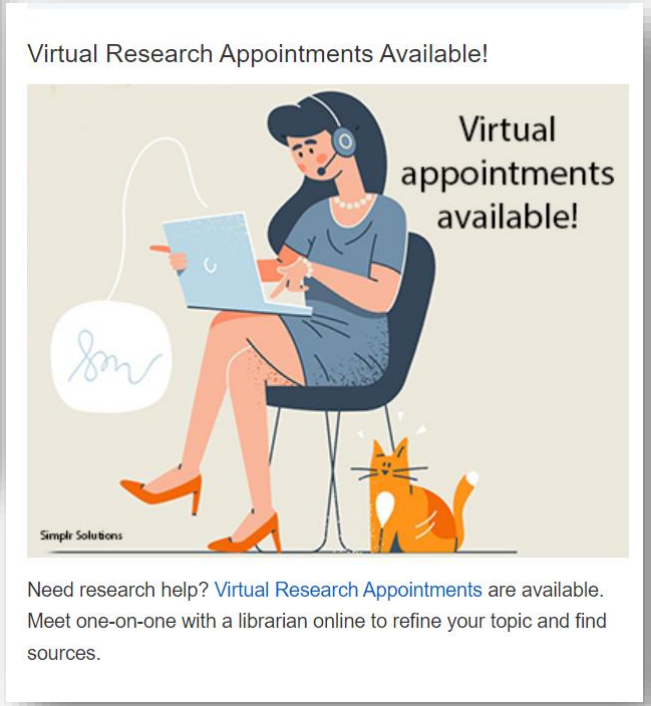


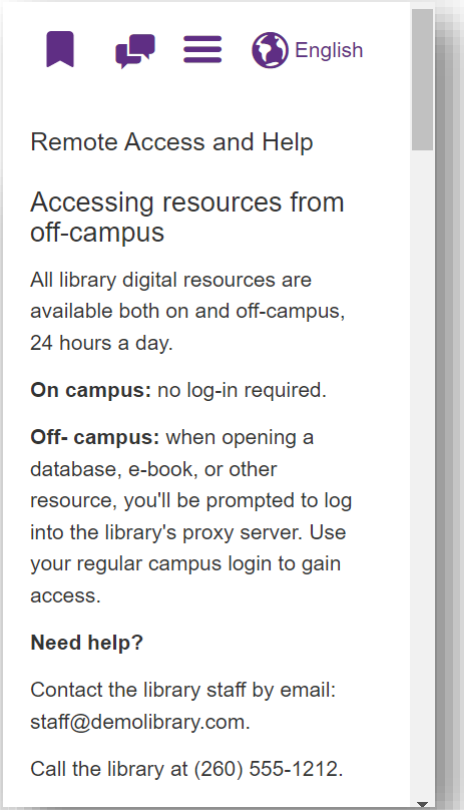
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Custom Panels - Examples





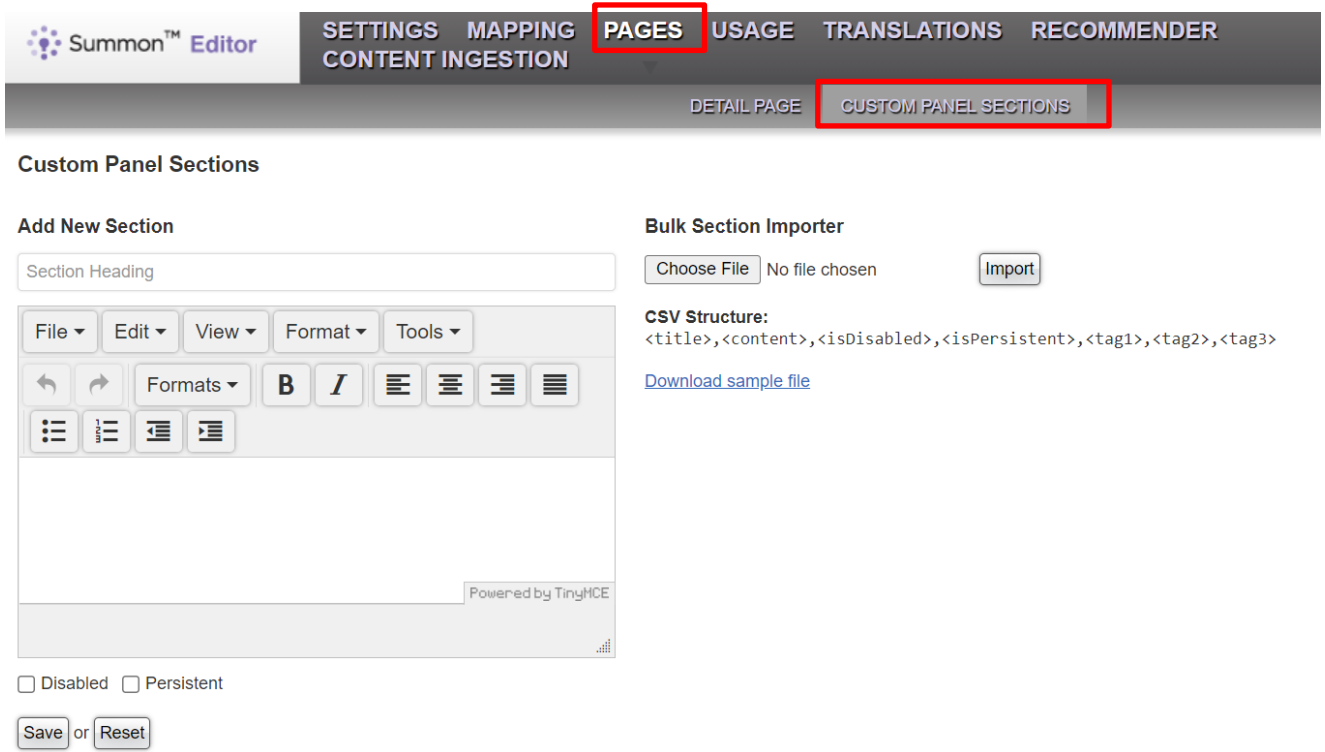


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Custom Panels – Getting Started

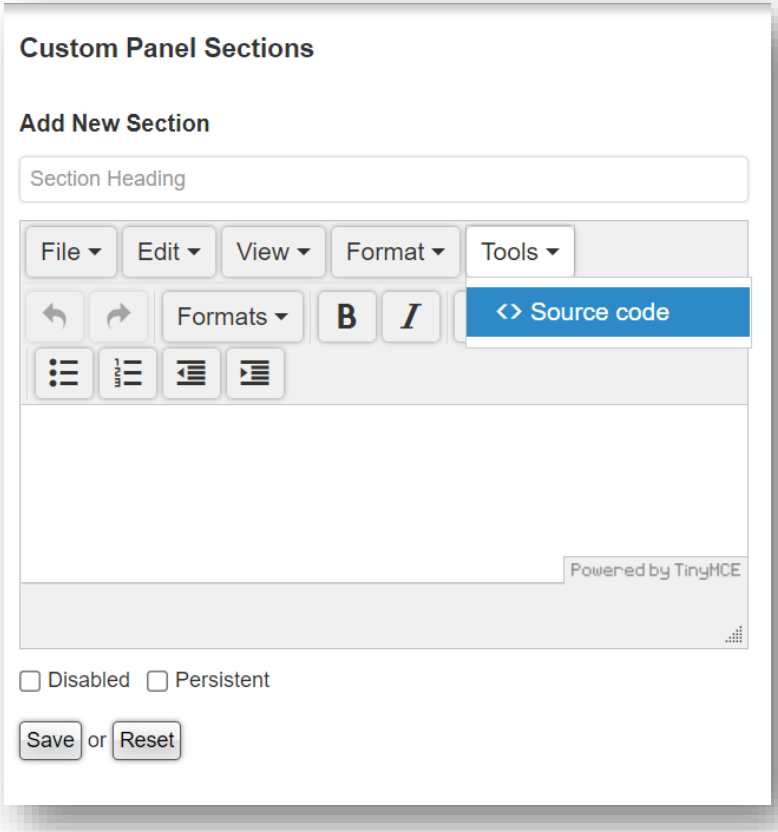
- Administration Console → Pages → Custom Panel Sections



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Custom Panels – Enhancing Visuals



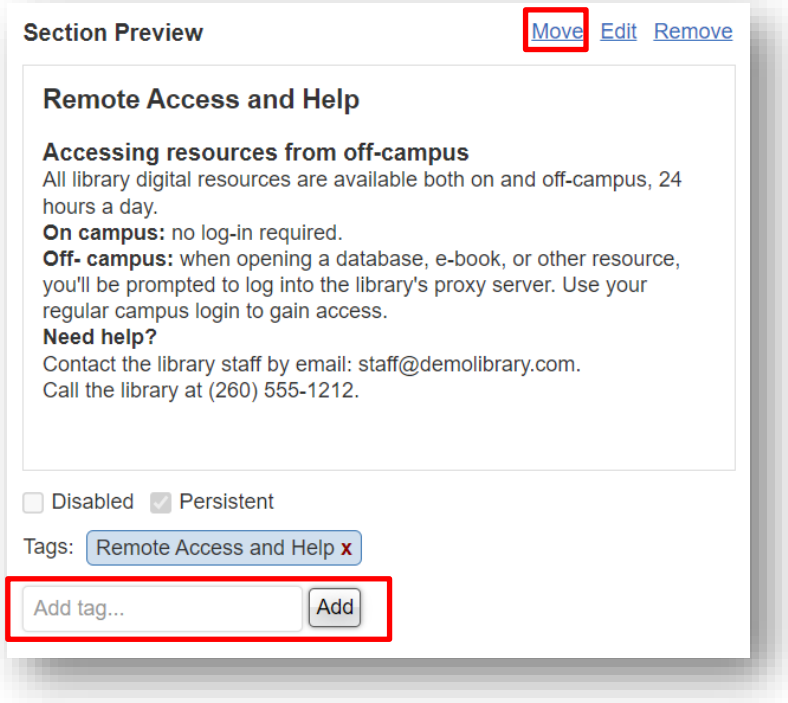
- You can add HTML, CSS, or JavaScript to your panel to make sections with better visuals and more powerful options
  - Enter a Section Heading (Title)
  - Make sure it's unique
  - Click the Tools button and choose <> Source Code
  - Paste your Code into the Source Code popup menu, and click OK, Save!

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Custom Panels – Customizing

- Adjust the **order** of your Custom Panels
  - Click Move to display the Section at the Top or the Bottom of the Custom Panel
- Adding **tags**
  - Use use the Add Tag feature to identify search keywords or phrases that are relevant to the content of the Custom Panel Section
- Display Custom Panels by default



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Custom Panels – Resources

- How to Configure Custom Panels
- What Can I Put in a Custom Panel?

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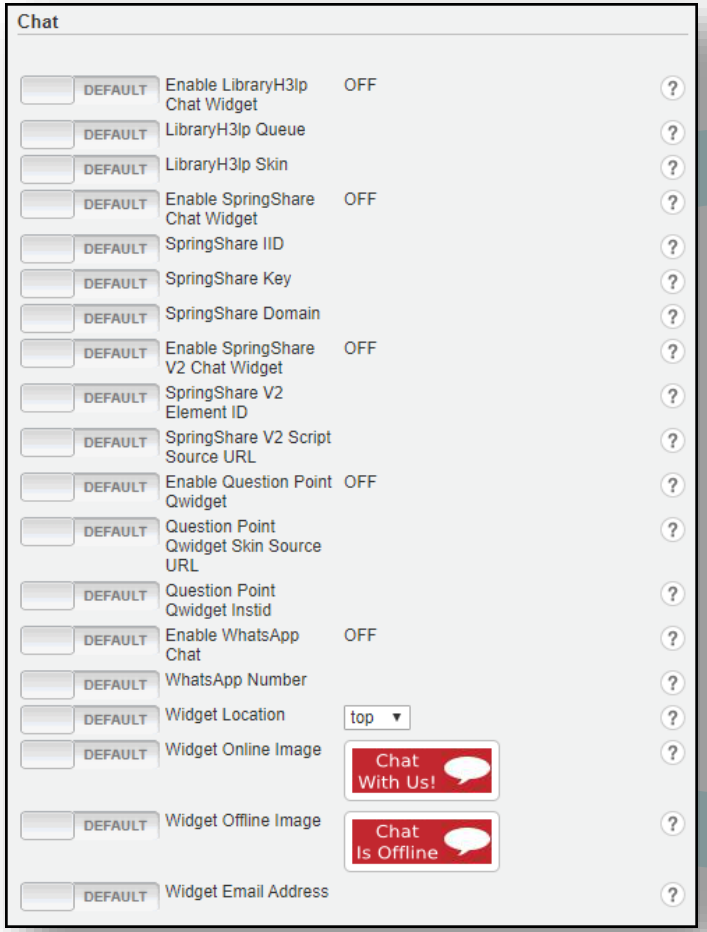


Summon - Widgets

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Widgets - Chat

- Accepted chat widgets
  - LibraryH3lp
  - Springshare's LibAnswers
  - OCLC's QuestionPoint
  - WhatsApp
- Activation
  - The **Chat** section of the Settings page in the **Summon Administration Console**
  - **Resource**

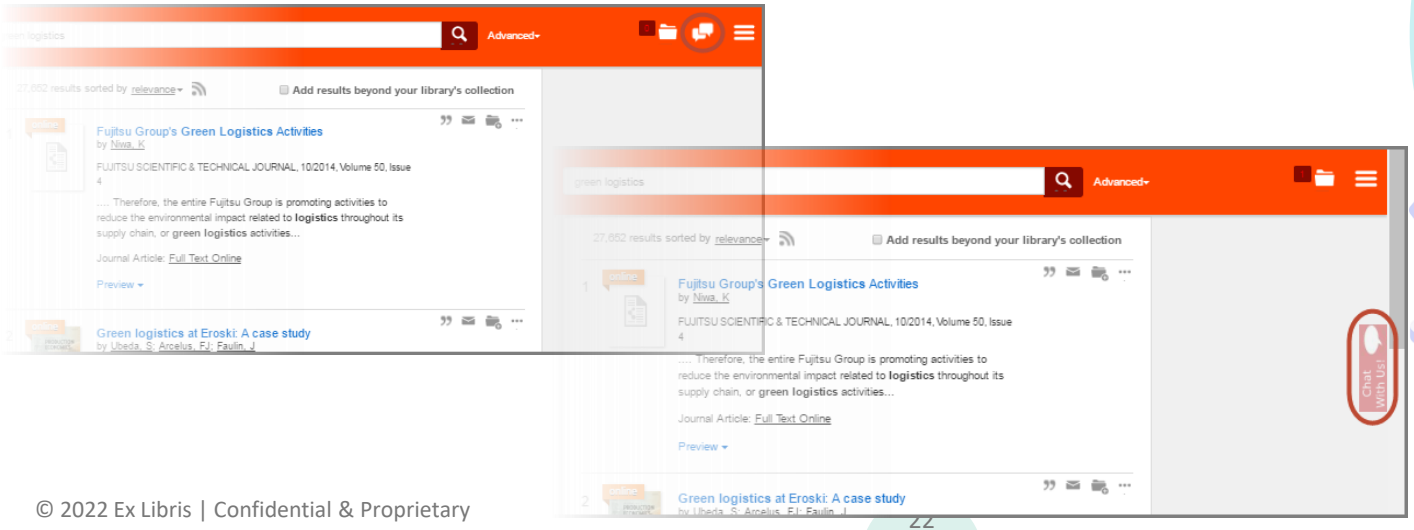


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Widgets – Chat Placement and Appearance

- Customize the appearance of your chat widget
  - Situate chat box at the top or to the right side
  - Add your institutions branding



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Widgets – LibGuides

- Springshare LibGuides
  - Indexing your Springshare's LibGuides into your Summon
  - To add your LibGuides to Summon, just submit a Case via the Support Center. Choose "CDI" as the Asset, and "Summon Local Content" as the Category



- Summon indexes the data directly from the LibGuide pages
  - Title, Publication date, Author, Publisher, Copyright info, Description, Full-Text, and Language are included
  - Navigation links from tab-based menus are also indexed

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Summon - Branding

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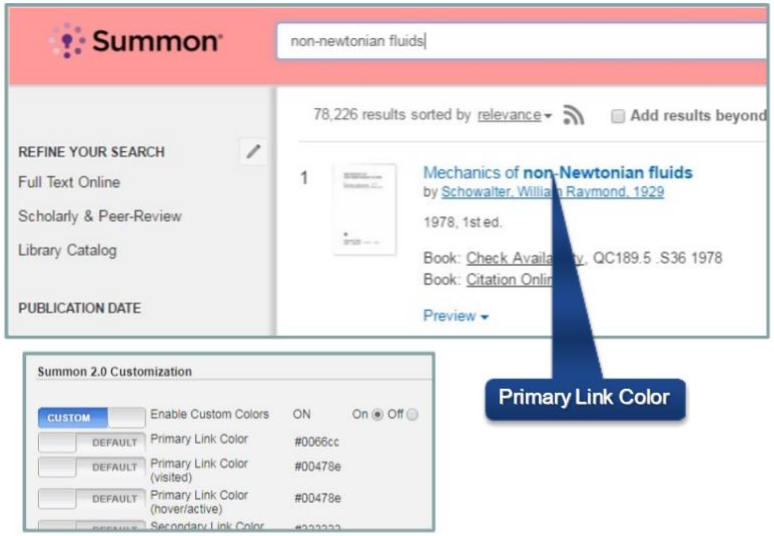
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Branding



- Aligning Summon with your library's branding
  - Colors, Logos, Banners
- What you can customize
  - Settings → Logos
  - Colors Of links: Settings → Summon 2.0 Customization
  - Enter Hexadecimal Code of preferred Color

Change the color of text links



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Additional Customizations

- Summon Search Results Indicators
  - New Design as of December 2021
  - Peer reviewed, original research, page number, etc. now displayed in consistent location
  - User Need: Identify Materials that might be relevant



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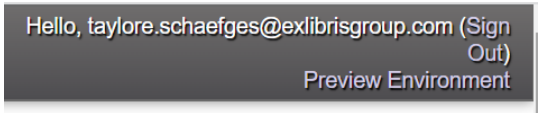
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Thinking of customizing but would like guidance?



- Resources Available
  - Customer Success Team
  - Support
  - Knowledge Articles
  - Summon Community: List Serv

- Remember you can use your preview environment to view changes before going live
  - Access the Preview UI at http://<*CLIENT*>.preview.summon.serialssolutions.com
  - Access the Preview Admin Console via the top right link from your Summon Admin Console:



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Questions?

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Thank you!

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