

Summon 2023 Roadmap Highlights

Overview

The Summon Roadmap comprises the key priorities for integration, new features, and user experience in the upcoming year. Below you'll see the major features planned for each quarter.

Each year we also include the top features suggested by you on the Idea Exchange and voted on for final approval and inclusion as part of the New Enhancement Request System courtesy of ELUNA and IGELU. These features are highlighted in the table below.

As always, the roadmap strikes a balance between necessary infrastructure investment and resolving issues reported by the community. Each quarterly release will include new features, problem resolutions, and infrastructure work and will be detailed in the release notes. The roadmap is subject to change based on community feedback as well as shifting challenges and priorities.

Important Dates

- February 1 – Preview January 18
- May 3 –Preview April 19
- August 2 – Preview July 19
- November 1 – Preview October 18

Roadmap

2023 H1	2023 H2
<ul style="list-style-type: none"> • Advanced Search: Improve Search Box Layout • Advanced Search: Updated Look and Feel Controls • SAML for Saved Searches • LTI Support for Summon, Phase 1 • Google Analytics 4 Support • Mandatory sender e-mail field in Summon (NERS) • Data Quality Improvements 	<ul style="list-style-type: none"> • Scopes for Summon Searches • Course Reserves for Sierra via Summon • Improve the Quick Look Pane Layout (NERS) • Display 5XX Fields in Quick Look (NERS) • “Include matches in Full Text” to Search Suggestions (NERS) • Ability to Customize Order of Elements in the Right Pane (NERS) • Ability to match language settings of Summon with 360 Link (NERS) • Prevent eBook and Computer File records from Merging (NERS) • LTI Support for Summon, Phase 2

2023 H1	2023 H2
<ul style="list-style-type: none"> • Ongoing Analytics • Accessibility Improvements 	

2023 H1

What's New?	Highlights	Impact	Status
Advanced Search: Improve Search Box Layout	Improve search box placement based on feedback from Q4 2022 update.	<ul style="list-style-type: none"> • All search boxes on the Advanced Search stack in one column. • Matches user expectation and layout of most major databases. 	Released in February 2023.
Advanced Search: Updated Look and Feel Controls	<p>Added missing controls for font and button colors on the Advanced Search form.</p> <p>Improve various options based on feedback from Q4 2022 update .</p>	<ul style="list-style-type: none"> • Colors for the font and button for "Clear All" and "Search" are now customizable. • Addressed issue with translation issue with "Search Options" on advanced search. • Fixed label formatting for "1 Year" button in Firefox. • Library location facet values selected on Advanced Search are now displayed on the Search Results page. 	Released in February 2023.
SAML for Saved Searches	Ability to log into Saved Searches using SAML authentication.	<ul style="list-style-type: none"> • Adds SAML integration to Saved Searches for Sierra via Summon institutions. • Allows for storage of Saved Searches on Summon Servers. • GDPR Compliant . • In addition to MS OneDrive and Google Drive logins. 	Released in February 2023.
LTI Support for Summon, Phase 1	<p>Ability to integrate Summon into Learning Management Systems (LMS) such as Canvas.</p> <p>Develop LTI (Learning Tools Interoperability) Support.</p>	<ul style="list-style-type: none"> • Development of apps for inclusion in LMS. • Initial development of integration touch points and tools for LMS support. 	Released in May 2023.
Google Analytics 4 Support	Update for Google Analytics.	<ul style="list-style-type: none"> • Improve reporting by updating to the most recent release. 	Released in May 2023.

What's New?	Highlights	Impact	Status
		<ul style="list-style-type: none"> Add support for Tag Manger. 	
Mandatory sender e-mail field in Summon (NERS)	Provide the option for a sender's email for citations.	<ul style="list-style-type: none"> Allows institutions to add a field requesting the user's email address. Address will be included in the body of the email to assist with follow up for staff, when needed. Configurable as a required field by institution. 	Released in May 2023.

2023 H2

What's New?	Highlights	Impact	Status
Scopes for Summon Searches	Allow users to 'pre-filter' their search, limiting to a specific group vs. searching the full catalog	<ul style="list-style-type: none"> Create scopes, and prioritize display order when there are multiple scopes Limit to local records Add or remove resources by ISBN/ISSN to a search scope Add or remove institutional repositories to a search scope Add or remove library locations to a search scope. 	Planned for release in second half of 2023.
Course Reserves for Sierra via Summon	Provide Course Reserve Support for Sierra via Summon.	Ability to provide access to course reserve links and data in Sierra via the Summon User Interface.	Planned for release in second half of 2023.
Improve the Quick Look Pane Layout (NERS)	A layout designed to better accommodate various metadata.	<ul style="list-style-type: none"> Usefulness of Quick Look pane varies based on the amount and type of metadata available for display Adjust the layout so the Quick Look displays all information well regardless of what information is absent or present. 	Planned for release in second half of 2023
Display 5XX Fields in Summon (NERS)	Allow institution to add 5XX note fields to Quick Look.	<ul style="list-style-type: none"> Display both a label for and the value in the field for a result. If the field is blank, it and its label should not be displayed. 	Planned for release in second half of 2023.

What's New?	Highlights	Impact	Status
"Include matches in Full Text" to Search Suggestions (NERS)	Improve the user experience on the Zero Results Page.	<ul style="list-style-type: none"> • Add the ability to apply the "Include Matches in Full Text" facet via a link on the Zero Results Page. • Configurable by institution. 	Planned for release in second half of 2023.
Ability to Customize the Order of Elements in the Right Pane (NERS)	Improve the layout options for the right-hand pane.	<ul style="list-style-type: none"> • Allow flexibility for number of results displayed by the Springshare Database Finder widget. • Allow institutions to determine order of display for Database Finder, custom panels, and Topic Explorer. 	Planned for release in second half of 2023.
Ability to match language settings of Summon with 360 Link (NERS)	Ensure language parameter is passed from Summon to 360 Link.	Language set by the user in the Summon user interface will also be applied in 360 Link to maintain the selected language.	Planned for release in second half of 2023.
Prevent eBook and Computer File records from Merging (NERS)	Reduce confusion caused by eBooks listed as Computer Files.	<ul style="list-style-type: none"> • Prevent Computer File records to merge with any other Content Type. • Only allow Computer File type records to merge with each other. 	Planned for release in second half of 2023.
LTI Support for Summon	Ability to integrate Summon into Learning Management Systems (LMS) such as Canvas.	<ul style="list-style-type: none"> • Develop LTI (Learning Tools Interoperability) Support. • Backend management tools for integration. • Rollout of services. 	Planned for release in second half of 2023.