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# Summon 2024 Roadmap Highlights

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## Overview

The Summon 2024 roadmap details the discovery features expected to be released throughout the year. The roadmap is based on community feedback, ideas from the Idea Exchange, NERS voted enhancements, and strategic enhancements that serve longer term goals. This published roadmap focuses on the highlights. We may add other development items over time, which will appear in the release notes.

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.

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## Important Dates

- February 14 – no preview
- May 1 – Preview April 17
- August 7 – Preview July 24
- November 6 – Preview October 23

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## Roadmap

2024 H1	2024 H2
<ul style="list-style-type: none"><li>• <a href="#">Canvas + LTI Integration</a></li><li>• <a href="#">Notes in Advanced Search</a></li><li>• <a href="#">Auto-enable Quicklinks</a></li><li>• <a href="#">Bulk export results list</a></li><li>• <a href="#">Display full title on mouseover</a></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Replace auto-scroll with pagination</a></li><li>• <a href="#">Scrolling improvements for facets</a></li><li>• <a href="#">Makes saved items permanent</a></li><li>• <a href="#">Showcase carousel widget</a></li><li>• <a href="#">Open search within journal in new tab</a></li><li>• <a href="#">Improved support for custom JS/CSS</a></li></ul>

## 2024 H1

What's New?	Highlights	Impact	Status
<b>Canvas + LTI Integration</b> – Support for the Learning Tools Interoperability 1.3 (LTI) standard has been added to Summon for Canvas.	<ul style="list-style-type: none"> <li>Allows libraries to point to and showcase Summon resources from within the Canvas LMS.</li> <li>Will be extensible to other LMSs in the future.</li> </ul>	Increases resource usage and meets students where they are already working.	Included in the February release.
<b>Notes in Advanced Search</b> – Notes is a new, individual field in the Advanced Search interface.	<ul style="list-style-type: none"> <li>Libraries can optionally configure a discrete Notes field to display in the Advanced Search menu.</li> <li>The search string may be an exact match or “contains” search.</li> </ul>	Enables users to search valuable and unique notes metadata curated by the library.	Included in the February release.
<b>Auto-enable Quicklinks</b> – Enables Quicklinks automatically for customer who have not opted out.	<ul style="list-style-type: none"> <li>Defaults the user experience to showing Quicklinks one-click access to PDF or HTML documents.</li> <li>Available for 1.5B records from 50 providers.</li> <li>Takes effect in May 2024.</li> </ul>	Promotes frictionless access to the resources that users are seeking.	Included in the February release.
<b>Bulk export results list</b> – Ability to export a large number (thousands) of search results.	<ul style="list-style-type: none"> <li>Introduce a new option in the user interface to support the bulk export of search results.</li> <li>Patrons can select to export search results in CSV/ Excel, RIS or BIBTEX formats.</li> </ul>	Users can save and maintain a large literature review outside the context of Summon.	Included in Preview in the May release. Planned for Production in August.
<b>Display full title on mouseover</b> – Display the full title to the user when hovering the cursor over a search result	Enables users on mobile devices or devices with small resolutions to view the entire title of a resource.	Provides clarity in search results to help identify useful content.	Included in the May release.

## 2024 H2

What's New?	Highlights	Impact	Status
<b>Replace auto-scroll with pagination</b>	Enables users to page through search results rather than using the	Complies with accessibility recommendations and provides a better	Included in the August release.

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	current "infinite scroll" method.	user experience.	
<b>Scrolling improvements for facets</b>	<ul style="list-style-type: none"> <li>• Currently, facets are not visible and cannot be refined if the user scrolls beyond the length of the facets pane.</li> <li>• This feature enables libraries to configure whether the facets pane scrolls independently from the results or is always visible.</li> </ul>	Enables users to view and apply facets regardless of which search results they are viewing.	Included in the August release.
<b>Make saved items permanent</b> – Saved items become permanent once the user authenticates.	Allow saved items to persist in the folder if a patron is authenticated, rather than deleting the saved items when the session ends.	Patrons can retain saved resources past the session timeout period as part of their research process.	Included in the August release.
<b>Showcase carousel widget</b> – A new Showcase widget will highlight a visual "carousel" of Summon resources on external library web pages.	<ul style="list-style-type: none"> <li>• Library can configure records/ search results to display to users using existing query syntaxes.</li> <li>• A code snippet is all that is needed to add the widget to desired pages.</li> <li>• Patrons will see the titles and cover images (if available) on the specified pages.</li> </ul>	Promote unique or new content, encouraging exploration and traffic to the library discovery system from sites such as university and faculty pages.	Included in the November release.
<b>Open search within journal in new tab</b> – Open "Search within [journal]" in a new browser tab.	<ul style="list-style-type: none"> <li>• Currently, the "Search within [journal]" feature executes the new search in the same tab/window.</li> <li>• This feature will open a new tab for the secondary search.</li> </ul>	Users preserve the original search context and results.	Included in the November release.
<b>Improved support for custom JS/CSS</b>	<ul style="list-style-type: none"> <li>• Incorporate a custom JS/CSS field in the Summon Admin Console to directly enter a script or CSS.</li> <li>• And/or upload a file.</li> </ul>	Summon administrators have easier configuration methods in the Customizer.	Included in the November release.

## CDI-Related Enhancements

What's New?	Highlights	Impact	Status
Evaluate "Online First" or "Ahead of Print" resources for better identification	Analyze CDI metadata (or lack thereof - e.g. no volume and issue information) that can be used to indicate that the article is available through the primary publisher as "online first" (has been peer reviewed and accepted for publication) but is not yet available through an aggregator.	Show users that a citation is available online, but the full text may not yet be available from an aggregator.	Analysis completed in 2024. See the 2025 Roadmap for next steps.
Book Reviews that were previously categorized as Articles by the match & merge process will now reflect their correct Content Type.	<ul style="list-style-type: none"> <li>Match &amp; merge process logic will be refined to better distinguish Book Reviews from Articles.</li> <li>Facets and result ranking will improve the user experience.</li> </ul>	Easier, more accurate identification of desired resources.	Analysis completed in 2024. See the 2025 Roadmap for next steps.
New verbatim search operator for exact matching	<p>If a user performs an exact search (in quotes) and adds the equals sign (=) after the query, only records that exactly match the phrase search will be returned.</p> <p>Example: "niagara fall"=</p>	Variations of the query that can potentially confuse the user (spelling, casing, stemming, synonyms) are excluded from results.	Included in the August release.