Summon

• Product Documentation

Access the latest documentation for Ex Libris products

  ◦ Overview of The Summon Service
  ◦ Configuring The Summon Service
  ◦ Searching in The Summon Service
  ◦ Help, Troubleshooting and Community Resources
  ◦ Frequently Asked Questions (FAQs)
  ◦ Summon Analytics

• Best Practices and How-Tos

Access a library of valuable how-tos, workflow best practices, and learn how to get the most out of Summon.

  ◦ English
  ◦ 中文

• Release Notes

Stay informed about the features and capabilities included in each product release

  ◦ Summon Release Schedule
  ◦ Summon: Release Notes
  ◦ Summon: Release Preview Environment
  ◦ Summon: Release Notes (2013 and earlier)
  ◦ Summon 版本发行说明
  ◦ Summon 릴리즈 노트

• Training

Learn new skills and get certified with our tutorials, recorded training and other materials

• Community Knowledge

Ex Libris, Part of Clarivate
Learn from other customers’ experience, access customer contributed articles and share your own expertise

- Analytics Evidence S10 - When we log into Summon Admin, our identity changes to “Guest”. Frequently we are unable to log into Summon Analytics.
- Analytics Evidence S11 - “Session Usage” report is known to provide incorrect session counts, but is still presented as correct.
- Analytics Evidence S12 - Make open access facet statistics available
- Analytics Evidence S13 - Facets usage - request to view excludes as well as includes
- Analytics Evidence S3 - Most Summon Action Usage Subject Area Filters Do Not Work
- Analytics Evidence S4 - Fields for which Summon Does Not Collect Any Information
- Analytics Evidence S5 - Summon Analytics Not available thru the Alma Analytics Menu Option
- Analytics Evidence S6 - Cannot Isolate Any Information about “Advanced Searches”
- Analytics Evidence S7 - The Summon Zero Results Searches Subject Area provides the ability to limit by field searched, but does not actually collect that information.
- Analytics Evidence S9 - Any staff member who wants to view Analytics must be given full administrative authority over the entire Summon Admin module.
- Analytics Evidence S1 - Popular Searches Weekly Report Returns Last 2 Months
- Analytics Evidence S2 - Simple List of Zero Result Searches Returns Error Message
- Analytics Evidence S8 - Some Canned Reports have Poor Visual Representation
- List of Summon over Alma Instances
- Summon Analytics Evidence Contributors and Subject Areas

• **Content Corner**
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CDI

- Knowledge Articles
- Product Documentation
- Release Notes
- Supporting Resources

• **Knowledge Articles**
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Answers as provided by our product analysts, to commonly raised questions.

- 360 Link链接出现空白页的问题该如何解决？
- Announcing CAB Abstracts Pilot for Summon
- Are ORCIDs indexed in Summon?
- Can a closed Salesforce case be re-opened?
- Can javascript be added to Summon?
- Chrome browser identifies connection as "Not Secure"
- Customer ability to close Salesforce Cases
- Discrepancy between filtered content types versus search results in Summon
- Enhancement Process - Common Q&A
How are rights mapped from the Client Center to Summon Index?

◦ How can daily record deletes be captured for Summon or Primo?

◦ How Can I Add a PubMed Search Box to Summon?

◦ How can I request new collections to be added to our Discovery Indexes, KnowledgeBases and the Alma Community Zone?

◦ How can my library mitigate throttling in Summon?

◦ How do I create a new folder or subfolder in Summon Analytics?

◦ How Do I Read The Title Clicks Report in Summon?

◦ How do I remove the proxy URL from the Summon Preview “Source” link to our Institutional Repository home page?

◦ How do I request a Support Portal Login for a new staff member?

◦ How do I select and deselect facets in Summon?

◦ How to show title-level holdings for journals and books in Summon

Introduction to the Knowledge Center

Knowledge Center Questions and Answers

◦ Summon: 360 Link Sidebar Helper Frame Does Not Always Display Next to the Full Text Item

◦ Summon: Discovery Inclusion Criteria Overview

◦ Summon: EUR Thesis Repository from Erasmus Universiteit Rotterdam: Content To Be Removed – Jan 2017

◦ Summon: Infosciences: EPF Lausanne from EPF Lausanne: Content To Be Removed – Jan 2017

◦ Summon: IP Addresses Do Not Appear in Summon Administration Console

◦ Summon: Preview Environment

◦ Summon: Problems Accessing FTP Site

◦ Summon: Problems Authenticating Remote Users

◦ Summon: ProQuest Dissertations and Theses Databases Update

◦ Summon: RePub from Erasmus Universiteit Rotterdam: Content To Be Removed – Jan 2017

◦ Summon: Scholars’ Bank from University of Oregon: Content Removed -- November 2015

◦ Summon: Smithsonian Biodiversity Duplicate Records in Search Results

◦ Summon: Support for RDA Guidelines in MARC21

◦ Summon: The European Library (TEL): Content To Be Removed - February 2019

◦ Summon: Troubleshooting "Server Not Found" Errors and Local ISP Issues

◦ Summon page is blank when accessing via IE11 on Windows 10

◦ Where can I find the Title Clicks Report Report in Summon?

◦ Summon Usage Statistics Login Screen

◦ Summon访问慢或者打不开的问题该如何解决？

◦ The Ex Libris Central Discovery Index (CDI) – An Overview

◦ Tips for Advanced Document Searching in the Customer Knowledge Center

◦ Viewing System Status for SaaS Environments

◦ What determines whether Image Spotlight shows in Summon?

◦ What is a granularity mismatch and are there workarounds to improve linking

◦ What is a Unique Identifier (UID) and why is it necessary for each record?

◦ What is Case Status, and What Does It Mean?
What is the difference between Syndetics Unbound vs Syndetics?

- What is the FTP address for uploading the library's catalog to Summon?
- What kinds of things can a library put in Summon Custom Panels?
- What procedure should be followed to alert Ex Libris of a system down?
- Where can I register for Summon and 360 Services webinars and view previous recordings?
- Why are all Summon sessions showing United States as the country location, regardless of origin?
- Why are some links from Summon going directly to full text, while others direct to the 360 Link Results page?
- Why are more records processed than updated/deleted in the Summon Content Ingestion Report?
- Why are OpenURL links from EBSCOhost failing?
- Why are there duplicate search results in Summon?
- Why do I get an error page when linking out to EBSCOhost databases?
- Why do I only see United States in the country field in OBI statistics?
- Why are other institutional repositories appearing outside my library's collection in Summon?
- Why do the Client Center and Summon have different content?
- Why isn't my Summon favicon displaying in Firefox?
- Why is there a difference in the number of searches and visits logged in the legacy and new Summon usage systems?

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