Summon Configuration

When moving from the Client Center or Intota to Alma, there are a few items to note regarding the Summon user interface and collection data uploads.

Summon Administration Console

All of your library’s existing configuration and customization in the Summon Administration Console will continue to apply to your Alma-Summon instance. For more information, see Configurations within the Summon Administration Console.

Note

While a Summon library progresses through its Alma implementation, the library has two Summon Administration Console profiles:

- The profile accessible via the Client Center or Intota: Until you go live with Alma-Summon, these settings and customizations continue to be reflected in the Summon instance you are providing to end users.
- The profile accessible via Alma: These settings and customizations affect your Alma-Summon instance only; changes do no impact your live Summon instance.

Access your Alma-Summon administration console profile from the below Discovery menu in Alma; Alma users are automatically logged in.

Discovery Menu in Alma

When user’s are signed in, the Summon user interface provides additional Alma-related links in the top right-hand corner of Summon.
The Alma-related links are detailed below. Alma-Summon automatically configures these links for your library:

- **ILL** – A Resource Sharing Request form can be used to request items from other institutions. For more information, see [Configuring the Resource Sharing Request Form](#).

- **Journal Search** – Your library's e-journal holdings in Alma are searchable via the Journal Search page. This feature is similar to the A-Z List link that was available to users when your library maintained its holdings in the Client Center or Intota. For more information, see [Using Journal Search](#).

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**Note**

Journal Search currently provides access to e-journal titles; e-book titles are currently not searchable.

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**Collection Data Uploads and Timeframes for Availability in Summon**

Updated Alma holdings and local collections (for example institutional repositories) will be indexed in Summon through the Summon Index process and timeframe your library relied on prior to moving to Alma.

**Configuring the Links to Alma**

The Alma Links page in the Summon Administration Console allows you to configure the following links on the Summon user interface:

- The Alma links that appear in Summon.
- The order in which the Alma links appear in Summon.
- The labels that appear for each of the Alma links in Summon.

**To configure the Alma links:**

1. From the Discovery Configuration menu ([Configuration Menu > Discovery](#)), select **Summon Admin Console** under **Other**.
2. Select **Settings** and then **Alma Links**.

![Alma Discovery Configuration Menu](image)

**Alma Discovery Configuration Menu**

2. Select **Settings** and then **Alma Links**.

![Alma Links Settings](image)

**Alma Links Settings**

3. For each of the fields listed in the following table, select **DEFAULT**, to customize a field's settings. Select **CUSTOM** to return a field to its default settings.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Account</td>
<td>Defines the display text for the link to the user's library card in Alma.</td>
</tr>
<tr>
<td>Journal Search</td>
<td>Defines the display text for the link to Journal Search page in Alma.</td>
</tr>
<tr>
<td>Blank Interlibrary Loan Form</td>
<td>Defines the display text for the link to the interlibrary loan request form in Alma.</td>
</tr>
<tr>
<td>Fetch It</td>
<td>Defines the link to the Fetch Item page (which may also be known as the Citation Linker) in Alma.</td>
</tr>
<tr>
<td>Ordering</td>
<td>This field allows to enable/disable the above links and specify their order in Summon by dragging and dropping an item under the <strong>Enabled</strong> or <strong>Disabled</strong> column.</td>
</tr>
</tbody>
</table>
4. Select **Save Settings**.

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**Adding New Institutional Repositories and LibGuides**

As an Alma user, you can load into Summon a brand new Institutional Repository (IR) or LibGuide by following the below steps.

- In advance of loading a new LibGuide into Summon, we recommend viewing the **Metadata Suggestions for your Guides** section of *Summon: Search and Display of LibGuides*.

- If you are an Alma Digital user, records for the new digital content will be included in your existing bibliographic record upload to Summon. See the **Publishing Bibliographic Records** section above to make sure the **Content Options** section of the Publishing Profile Details Page has the Digital checkbox selected. You do not need to complete any of the steps detailed below.

**To add a new IR or LibGuide:**

1. From the **Discovery Configuration** menu in Alma, select **Summon Admin Console** and then select **Content Ingestion** at the top of the administration console.

   ![Alma Discovery Configuration Menu](image)

   *Alma Discovery Configuration Menu*

2. Select either **Institutional Repository** or **LibGuides** from the Content Ingestion menu at the top of the page:

   ![Content Ingestion Menu](image)

   *Content Ingestion Menu*

3. Complete the appropriate form:

   - **Add Institutional Repository** form:
     1. Repository Type: Enter dspace, ContentDM, locally developed or whatever the appropriate type is. The Type does not display in the Summon user interface.
     2. Public URL
3. OAI-PMH Access Point URL

4. Allow access to patrons outside your institution: Select Yes if repository should be publicly accessible to all Summon customers; select No if access should be limited to your institution's patrons.

5. Does IR contain any full-text records?: Select No if the repository only contains abstracts/citations.

6. Full Text Flagging Method: If you selected Yes, the IR contains full-text records, how are the full-text records identifiable so that Summon can include these records when a user limits to full-text?
   - For example, maybe all dissertations in the IR are full text, or maybe all records with a format of application/pdf are full text. Enter whatever way we can identify the full-text records.

7. Display name for library locations facet (Optional): Some libraries find that the Library Location facet assists users in accessing IR content. Note that one Library Location per IR is our standard practice.

8. Description of Content: For example, "Images, texts and audio/video from ECU's diverse collections." Maximum length 100 characters.

9. Select Save.

   - **Add LibGuides** form:
     1. LibGuides URL
     2. LibGuides Name
     3. Expected Record Count
     4. Select Save.

4. The Status displayed at the bottom of either the institutional repository or LibGuide form will change from New Request to In Process, and our Content team will begin working on configuring your collection for uploading to the Summon Index.

5. In Alma, use the Electronic Collection Editor page (Resources > Create Inventory > Add Local Electronic Collection) to create a local electronic collection for your new Institutional Repository or LibGuide:
   - Provider package code (DB id): Currently the ID is available only through our Support Team. Please use the Ex Libris Support Portal (accessible from the More Sites drop-down menu above) to request the ID. In your request, please include the URL of the IR or LibGuide you are inquiring about.
   - For more information about the Electronic Collection Editor page, see Adding a Local Electronic Collection in Alma.
6. Once our Content Team has completed its work and the new IR or LibGuide is available in the Summon index, the status field at the bottom of the form in the Summon administration console will display as “Live in Summon.” It will take approximately three to six weeks for the content to be processed and appear in Summon.

- Once the content is live in Summon, one way to quickly view all of the IR records in Summon is by doing a Summon search on the Provider Package Code (DB ID) that you entered into the Electronic Collection Editor in Alma.
  
  - Use the Summon search syntax DBID:<DBID for the IR>. For example, if the DBID is 01MyLibrary_ir_01, use the Summon search syntax DBID:01MyLibrary_ir_01.
  
- For additional IR details such as how to maintain the content in Summon if the repository does not support the OAI-PMH protocol, see Summon: Including Your Library’s Institutional Repository.

- To contact our Support Team, use the Ex Libris Support Portal (accessible from the More Sites drop-down menu above). Please include the URL of the IR or LibGuide you are inquiring about.

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**Configuring Course Reserves in the Summon UI**

Course reserves information can appear in the following areas of the Summon UI: Facets, Brief results, and the Course Reserves page.

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**Enabling the Course Reserves Facets in Summon**

Course reserves that are defined in Alma are published to Summon according to the course's start date and deleted according to the course's end date. Depending on the start date specified in Alma and the Summon Index Update Schedule, it can take up to a week for course reserves to appear in Summon. For this reason, you may want to backdate
the start date by a week for your courses to ensure that the Summon Index Update completes before the start of the courses.

![Course Reserve Facets in Summon](image)

**Note**

You must set the **Course Information Enrichment** option in the **Publishing bibliographic records to Summon** publishing job in Alma (see [Publish Bibliographic Records to Summon](#)).

### To enable the course reserves facets:

1. Open the Summon Admin Console (**Discovery > Summon Admin Console**).

2. Select the **Settings** tab.

3. In the Facets section, drag and drop the **Course Instructor** and **Course Name and Number** fields to the **Enabled** column.

![Settings > Facets Section](image)

4. Save your changes to the Facets section.

### Configuring the Course Reserves Page

The Course Reserves page is a dedicated Summon page that allows users to view course reserves information defined in your institution. To enable the Course Reserves page, perform the following configurations:

1. Create the Alma Course Reserves API key.
2. Enable the Course Reserves Page in Summon.

3. Configure the display fields.

Creating the Key for the Courses API

The Courses API allows Summon to retrieve all course reserves information defined for the institution, which is defined in Alma/Leganto. To gain access to this information, you must create a key for your institution in the Ex Libris Developer Network.

To define the API key:

1. Log on to the Ex Libris Developer Network using your institution-specific user name and password:
   https://developers.exlibrisgroup.com/

2. On the My APIs page (Ex Libris Developer Network > Build My APIs), select API Keys > Manage Keys.

3. On the Manage API Keys page, select Add API Key to open the Add/Edit API Key dialog box.

4. In the Add/Edit API Key dialog box, specify a Name and Description and then select Add Permission.
5. For the new permission, specify the following fields:
   
   - **Area** – Select **Courses**.
   
   - **Env** – Select either **Production**, **Sandbox**, or **Guest Sandbox**.
   
   - **Permissions** – Select either **Read-only** or **Read/write**.

6. Select **Save** to create your API key and to return to the Manage API Keys page.

7. On the Manage API Keys page, select **Copy** to use the API Key for later pasting.
8. Using your API key, enter the following the URL to see that the Courses API is able to retrieve course reserves information from your institution:

```
https://api-na.hosted.exlibrisgroup.com/almaws/v1/courses?limit=10&offset=0&order_by=code%2Csection&direction=ASC&apikey=[api_key]
```

**Example Test Results**

**Enabling the Course Reserves Page**

After you have created the Courses application in the Ex Libris Developer Network, you must integrate it with Summon by adding the API key to the Course Reserves settings in the Summon Administration Console. For more information, see [Summon Admin Console](#).

**Configuring the Display Fields**

Summon allows you to configure the following information on the Course Reserves page:
• The display of the following Course Reserve fields: **Course ID**, **Course Description**, and **Course Instructor**.

• The order in which the fields appear on the page.

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**Course Reserves Page in Summon**

**To configure the display fields:**

1. Open the Summon Admin Console (**Discovery > Summon Admin Console**).

2. Select the **Settings** tab.

3. In the **Course Reserves** section, move the fields that you want to display to the **Enabled** column. The fields appear in order starting with the field at the top of the **Enabled** column. All disabled fields will not appear, but their information is still searchable.

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**Fields Display Option**

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**Note**

You must enable at least one display field.

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4. Save your settings.
Prioritizing Merged Catalog and Provider Links

In situations where an electronic record in Alma merges with a provider's record, both links appear in the Summon UI. This option allows you to suppress or prioritize the display of these links in the Summon UI.

To configure merged catalog records links:

1. Open the Summon Admin Console (Discovery > Summon Admin Console).
2. Select the Settings tab.
3. In the Merged Catalog Record Link Prioritization section, perform the following actions as needed:
   - If you want to suppress a type of link (Catalog or Provider), move it to the Disabled column.
   - If you would like to display a type of link (Catalog or Provider) first, move it to the top of the Enabled column.

   **Note**

   If both types of links are disabled, neither will display in the Summon UI.

4. Save your settings.