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Piecing Together Summon over Alma Documentation

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Piecing Together Summon over Alma Documentation

Summon Customer Session: Integration and Interoperability with Other Products. February 5, 2020

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ABSTRACT

Ex Libris provides some useful documentation for “Alma-Summon Integration” but it is not complete. Most Alma documentation and online help pages assume you are using Primo. Sometimes the Alma configurations for Primo apply to Summon, but mostly they do not. The ELUNA Summon Product Working Group members using Summon over Alma started a project to identify existing documentation, consolidate it, and create supplemental documentation where necessary. We hope this will help Ex Libris provide better support for Summon over Alma.

MY BACKGROUND

I am the Electronic Services Librarian at Embry-Riddle Aeronautical University in Daytona Beach, Florida, and a member of the Summon Product Working Group. My library, Hunt Library, supports about 6,000 resident students as well as 30,000 online students in our Worldwide campus. We have used Summon (which we branded EAGLEsearch) for over ten years. Last year we completed a migration from Ex Libris Voyager to Alma. We kept Summon, which became Summon over Alma. The biggest change for me was moving from 360 Link to the built-in Alma Link Resolver.

Piecing Together Summon over Alma Documentation

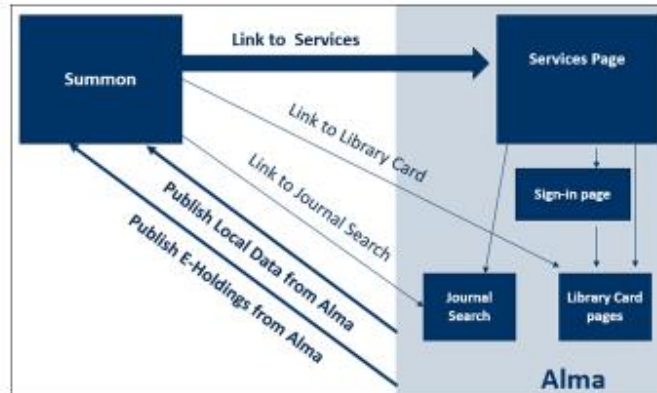
Jack R. Hunt Library, Embry-Riddle Aeronautical University

- Pre-migration: Summon with 360 Link and Voyager ILS
- Post-migration: Summon over Alma and Alma

MIGRATION TO ALMA

Most libraries today when implementing Alma also implement Primo as their discovery service. I understand that Ex Libris will not sell you Summon and Alma as a package. Summon over Alma was developed to allow existing Summon users to adopt Alma without having to change their discovery service. This was the case with my library. By keeping Summon, we could convince our university that our migration from Voyager to Alma was a backend upgrade. Also, there would also be less disruption for our library users who were already familiar with Summon.

Before our recent Alma migration, we were maintaining three systems: a Voyager ILS, an Ex Libris 360 Link link resolver, and Summon. Summon over Alma reduced this to two systems, effectively combining the functionality of the OPAC—for searching the collection, accessing user accounts, and item self-renewal—with the link resolver—for accessing our electronic resources.



[Source: [Ex Libris Knowledge Center Alma-Summon Integration Overview](#)]

ALMA-SUMMON INTEGRATION

While it's clear that Alma and Summon over Alma are two separate products—the Summon and Alma Services interfaces do look less consistent than Summon and 360 Link do—they are integrated in a few important ways. Summon over Alma provides:

- Real-time availability for library holdings,
- A way to search and browse Course Reserves,
- Menu links to Journal Search and Citation Linker pages,
- Access to My Account pages to access your library account in Alma,
- The publishing of library print, electronic, and digital holdings to Summon.

Real-Time Availability

Summon over Alma provides real-time availability of physical items in your collection. In your Summon search results, you can instantly see whether that item—whether a book, journal, DVD, or other type—is available for checkout. Previously in Summon with Voyager, users saw the message “Check Availability” as a link to click through to the library catalog to find out the item’s status. Summon over Alma can truly be said to function as an OPAC.

Course Reserves

Summon over Alma integrates with Alma to allow users to search and browse Course Reserves. To do this, Summon uses an Alma API. However, this is very easy to configure. During implementation, or any time after, you simply get an API Key from Ex Libris and enter it into a field in the Summon Administration Course Reserves page. This adds a Course Reserve link at the top and Course Reserves facets on the search results page, if enabled.

Course Reserves

Course ID	Description	Instructor
AE302	Aerodynamics II	Narayanaswami, Lakshmanan
AE304	Aircraft Structures I	
AE313	Space Mechanics	Seo, Dongeun
AE314	Experimental Aerodynamics	Davids, Lisa

Course Reserves Search and Browse

COURSE INSTRUCTOR ▾

- Narayanaswami, Lakshmanan (3)
- Golubev, Vladimir (2)
- Rollin, Bertrand (2)

COURSE NAME AND NUMBER ▾

- Aerodynamics I AE301 (2)
- Aircraft Preliminary Design AE420 (2)
- Aerodynamics II AE302 (1)

Course Reserves Facets

Journal Search and Citation Linker

Summon over Alma provides a Journal Search and a Citation Linker page, accessible from a configurable menu in Summon. These are similar to the ones in the 360 Link e-Journal Portal except they are built-in Alma Services.

EAGLEsearch Sign in Menu

Journal Search atmospheric chemistry

2 Results

Refine Your Results

Sort by Relevance ▾

Availability ^
Online

- JOURNAL

Journal of atmospheric chemistry (Online)

1983

PEER REVIEWED

Available Online >
- JOURNAL

Atmospheric chemistry and physics : ACP.

European Geophysical Society.; European Geosciences Union.; ©2001-

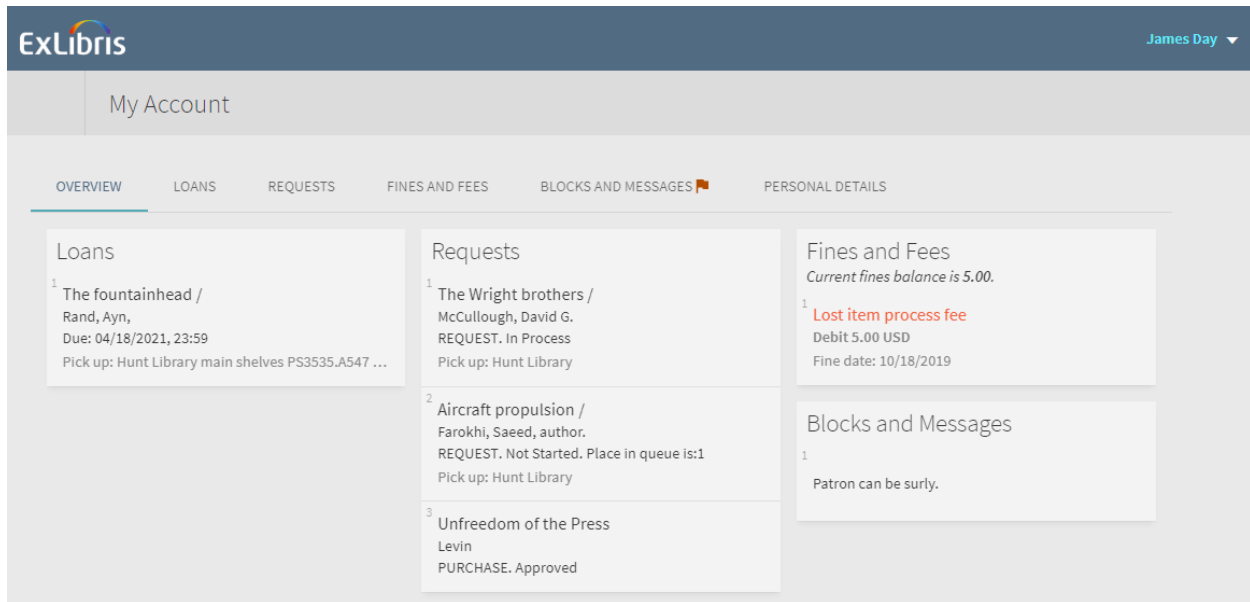
PEER REVIEWED OPEN ACCESS

Available Online >

Journal Search

My Account

Summon over Alma provides access to your library account in Alma. You can view your items on loan, your requests, any fines and fees, and blocks and messages. If allowed, you can renew your items yourself. You can place and cancel requests yourself, as well. Again, Summon over Alma functions as a self-service OPAC.



My Account

Publishing from Alma to Summon

The final integration of Alma and Summon I'll mention is the ability of Alma to publish library print, electronic, and digital holdings to Summon. Alma allows you to schedule jobs to publish Alma records to Summon daily.

Active	Name	Job Category	Created	Schedule	Next Run	
<input checked="" type="checkbox"/>	Publishing to Google Scholar	Publishing	1744...	Every Saturday at 01:00	02/08/2020 01:00:00 EST	...
<input checked="" type="checkbox"/>	Publishing electronic records to Summon	Publishing	exl_j...	Every day at 20:00	02/04/2020 20:00:00 EST	...
<input checked="" type="checkbox"/>	Publishing to Summon	Publishing	exl_j...	Every day at 04:00	02/05/2020 04:00:00 EST	...

Alma Publishing Jobs

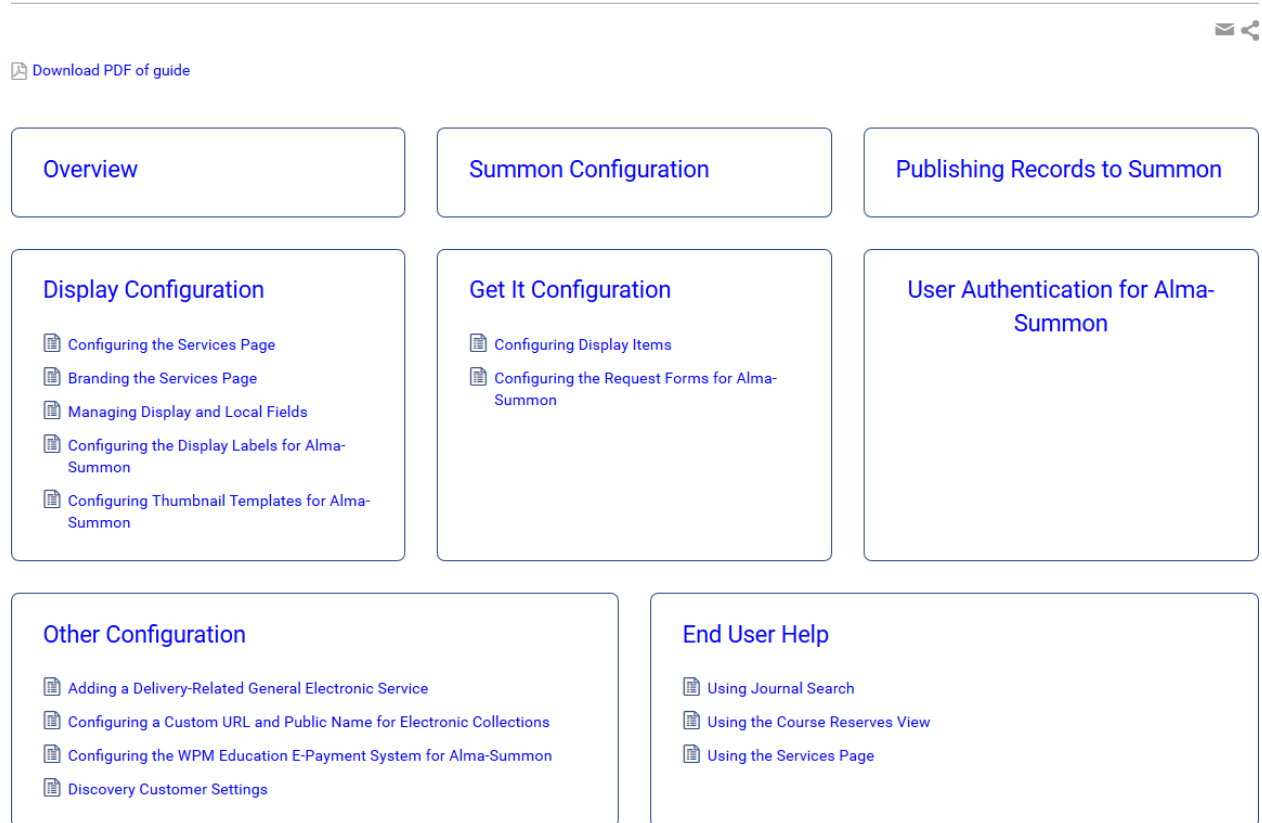
SUMMON OVER ALMA DOCUMENTATION

If you have followed the library technology field over the past decade, you'll know that Summon and 360 Link were developed by Serials Solutions which was purchased by ProQuest in 2011. Ex Libris already had their own discovery service: Primo. Alma was developed with Primo in mind as its public interface. The developers at Ex Libris did a very good job of integrating Alma and Summon. However, the Alma

documentation hasn't been fully updated to reflect that Alma customers might be running Summon instead of Primo (or Primo VE).

During my library's implementation of Alma over the course of 2019, I frequently came across instances where the Alma documentation gave instructions for Primo, but not for Summon. Sometimes the configurations apply to Summon, but mostly they do not. Much of the implementation information was consolidated into a single guide titled [Alma-Summon Integration](#). However, it is incomplete. During our implementation, I found useful information in sometimes surprising places. For example, there are three [training videos](#) for Summon over Alma; each video has a corresponding Handout with useful Summon over Alma information.

Alma-Summon Integration



The screenshot shows a navigation menu for the "Alma-Summon Integration" guide. At the top right, there are icons for email and social media. Below the title, there is a link to "Download PDF of guide". The menu consists of several boxes, each containing a title and a list of sub-topics:

- Overview**
- Summon Configuration**
- Publishing Records to Summon**
- Display Configuration**
 - Configuring the Services Page
 - Branding the Services Page
 - Managing Display and Local Fields
 - Configuring the Display Labels for Alma-Summon
 - Configuring Thumbnail Templates for Alma-Summon
- Get It Configuration**
 - Configuring Display Items
 - Configuring the Request Forms for Alma-Summon
- User Authentication for Alma-Summon**
- Other Configuration**
 - Adding a Delivery-Related General Electronic Service
 - Configuring a Custom URL and Public Name for Electronic Collections
 - Configuring the WPM Education E-Payment System for Alma-Summon
 - Discovery Customer Settings
- End User Help**
 - Using Journal Search
 - Using the Course Reserves View
 - Using the Services Page

[Source: Ex Libris Customer Knowledge Center]

Search Page

During our Alma migration, I was looking for information so often at the various Ex Libris sites that I created an "Ex Libris Search" page at <https://library.erau.edu/elsearch>. It searches the three Ex Libris sites shown on the page.



- Sites searched:
- [Ex Libris Customer Knowledge Center](#)
 - [Ex Libris Developer Network](#)
 - [Ex Libris Trust Center](#)

Send comments to James.Dray@erau.edu.



Web Image

About 100 results (0.28 seconds) Sort by: Relevance

- [Summon Over Alma - Ex Libris Knowledge Center](#)
https://knowledge.exlibrisgroup.com/Summons/Summon_Over_Alma
Nov 2, 2017 ... For Summon customers moving to the Alma platform, learn how to configure Summon and Alma to work together seamlessly.
- [List of Summon over Alma Instances - Ex Libris Knowledge Center](#)
https://knowledge.exlibrisgroup.com/.../List_of_Summon_over_Alma_Instances
Jan 7, 2020 ... Below is a list of sites using Summon over Alma. Updated 1/7/2020. Allegheny College - <https://allegheny.summon.serialssolutions.com>.
- [01 Alma-Summon Interoperability - Ex Libris Knowledge Center](#)
https://knowledge.exlibrisgroup.com/.../Summon_Over_Alma/01_Alma-Summon_Interoperability
Dec 13, 2018 ... This session will outline the interactive relationship between Alma and Summon, emphasizing configuration considerations for both the Alma ...
- [Summon - Ex Libris Knowledge Center](#)
<https://knowledge.exlibrisgroup.com/Summon>
... Some Canned Reports have Poor Visual Representation - List of Summon over Alma Instances - Summon Analytics Evidence Contributors and Subject Areas.

If you perform a search for the actual product name “Summon over Alma” you get very few relevant results. (And one of those is simply a list of Summon over Alma instances I compiled during our migration.) If you search for those same words without the quotes, you will get more results but still not the *Alma-Summon Integration* guide on the first page or two of results.

In the Ex Libris Customer Knowledge Center, if you select Summon as the product and search for “Summon over Alma” (with no quotes), you will not find the *Alma-Summon Integration* guide. If you select Alma as the product and perform the search, the *Alma-Summon Integration* guide will be the first result.

Examples

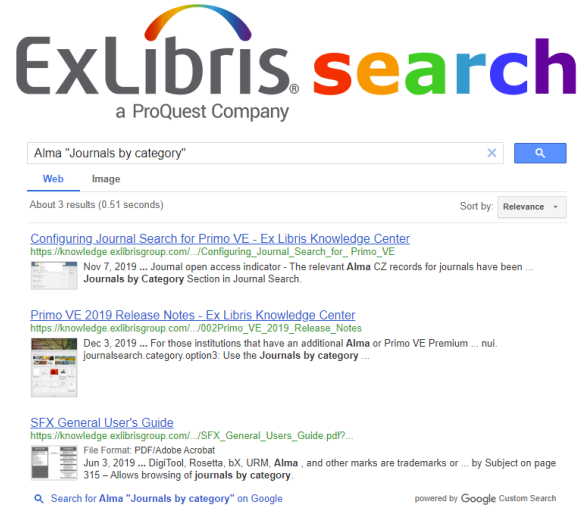
I’ll give three brief examples where the Alma documentation did not provide instructions for Summon over Alma users.

The screenshot shows the ExLibris Journal Search interface. At the top, there is a search bar with the text "Journal Search" and "Find online journals by publication title or ISSN". Below the search bar, there is a section titled "Journals by category" with a list of categories: Arts, Architecture & Applied Art; Business & Economics; Earth & Environmental Science; Engineering & Applied Sciences; General; Health & Biological Sciences; History & Archaeology; Journalism & Communications; Languages & Literatures; Law, Politics & Government; Music, Dance, Drama & Film; Philosophy & Religion; Physical Sciences & Mathematics; and Social Sciences. To the right of the category list, there is a section titled "Search for journals" with the text "Use the following options to find journals:" and two bullet points: "Enter a journal title in the search box." and "Use the Journals by category option to browse journals by category."

Journal Search with Journals by category

Journal Search: Journals by Category

The Summon over Alma Journal Search page has an optional feature to browse journals by category. This feature wasn't enabled by default (at least for us) but I saw it on a few other Summon over Alma instances and we wanted it.

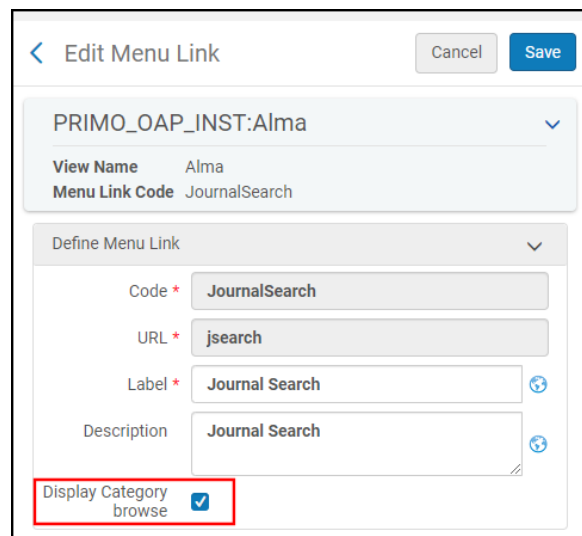


Searching the Ex Libris documentation for ‘Summon “Journals by category”’ gave me *zero* results. Searching for ‘Alma “Journals by category”’ gave me three results, the closest relevant result being for Primo VE.

Sometimes the Primo instructions work for Summon, so I selected the [Configuring Journal Search for Primo VE](#) product documentation page. Following the “Browsing Journals by Category” instructions, you’ll find they refer to a tab that doesn’t exist containing a crucial checkbox that can’t be accessed. We learned from our implementation team that for Summon, you must simply enable and schedule the **Creates Journal Categories File** job to make the “Journals by category” list display.

Code Tables

Most of the wording on the Alma Services pages can be customized. This is done by editing the labels located in Alma Code Tables. This is an instance where there *is* documentation for Summon over Alma users. However the list of relevant code tables is missing at least four relevant tables.



Code Table	Notes
Citation Linker Labels	Citation Linker Page
Header/Footer Tiles Labels	Services Page, Journal Search
Results Tile Labels	Journal Search
Top Level Facet Labels	Journal Search

Alma Help Pages

On many screens in Alma, there is a “Help For This Page” link in the top-right corner that takes you to an online help document. Nearly all of these help pages assume you are running Primo, and the Summon customer is left guessing if the instructions apply. They often do, but sometimes you’ll reach a step that doesn’t match with your Summon over Alma setup.

Configuring General Electronic Services

PERMISSIONS: To configure general electronic services, you must have one of the following roles:

- General System Administrator
 - Fulfillment Administrator
-

Note This section applies only to Primo. For information on how to configure general electronic services in Primo VE, see [Configuring General Electronic Services for Primo VE](#)

[Source: Ex Libris Customer Knowledge Center]

For example, if you are on the **Alma Configuration > Fulfillment > Discovery Interface Display Logic > General Electronic Services** page and use the “Help For This Page” link, you will go to the [Discovery Interface Display Logic](#) online help page at the “Configuring General Electronic Services” section. The note says “This section applies only to Primo.” Note that there is an [Adding a Delivery-Related General Electronic Service](#) help page for Summon over Alma, but you would have to find it yourself.

SOLUTIONS

I brought up this problem during the December 2019 meeting of the Summon Product Working Group. Other members agreed that Alma and Summon over Alma documentation was often confusing. I was tasked with starting supplemental Summon over Alma documentation. We have a few solutions.

For Alma online help pages, there isn’t anything the Working Group can do other than to note the problem pages and submit the list to Ex Libris. Mostly the solution would be to add a few words noting that the instructions apply to Primo *and* Summon, or to link to instructions for Summon over Alma where different. We will do that.

The same applies to the Alma Code Tables. We can alert Ex Libris to which additional Code Tables are relevant to Summon over Alma. We’ll do that, as well.

Finally, we will create and post supplemental configuration and customization guides for Summon over Alma to the [Ex Libris Customer Knowledge Center](#). My proposal is to start at the public Summon and Alma Services pages—including Journal Search, Citation Linker, and My Account—and point back to where the documentation is (or should be) to configure or customize that page, section-by-section and element-by-element.

If you are a Summon over Alma customer and want to contribute to the project, please contact me at James.Day@erau.edu.