Alma-Summon Integration
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Overview

The integration of Summon and Alma allows users to search a single index that includes a central index (approximately two billion records), your local data defined in Alma, and any non-Alma institutional repositories and LibGuides that were previously set up when the library administered Summon through the Client Center or Intota. The following figure shows the discovery flow between Summon and Alma.

The following functionality is configured with or provided by Summon:

- Users can perform a search in Summon and access a local Alma record's services (such as View It and Get It), which are provided by the Services page in Alma.
- Harvesting of local Alma bibliographic records (physical, electronic, and digital) and electronic holdings.
- The ability to search non-Alma institutional repositories and LibGuides, which are identified by a database ID. Because these repositories are defined as local electronic collections in Alma, services for these records are provided by the Services page as well.
- Publisher resources that utilize IEDL (Index-Enhanced Direct Linking) will link directly to the content provider from Summon results. Otherwise, the record's services will come from the Services page, which utilizes Alma's link resolver.
- A hyperlink is provided in Summon to access the Journal Search page, which is provided by and configured in Alma. For more information, see Journal Search Page.
- A hyperlink is provided in Summon to access users' library cards, which are managed by Alma.
- The Course Reserves View allows users to view and search course reserves information, which is defined in Alma/Leganto. For more information, see Using the Course Reserves View and Configuring the Course Reserves View.

The following functionality is configured with or provided by Alma:

- The Services page allows users to access services for a local record in Alma. For example, these services may allow users to request physical items from the library or view full text for a journal. For more information, see the following sections: Configuring the Services Page, Modifying Labels on the Services Page, Configuring Requests Forms, and Branding the Services Page.
• Authentication allows users to access services that are provided by the library. For more information, see Configuring Alma User Authentication.

• The Journal Search page is provided by and configured in Alma. For more information, see Journal Search Page.

• The Library Card allows users to track requests, fines and fees, and current loans. For more information, see Modifying Labels on Library Cards.

• Publish bibliographic records and electronic holdings to update Summon's search index.

• The support of non-Alma institutional repositories and LibGuides. These databases must be defined as local electronic collections in Alma and include an associated database ID, which is defined in Summon. For more information on configuring local electronic collections, see Adding New Institutional Repositories and LibGuides.

• The Alma Link Resolver replaces functionality that 360 Link previously provided.
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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- **My Account** – The My Account page in Summon displays the end user's Library Card information in Alma, such as loans and requests.

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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]

**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)

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

![Content Ingestion Menu](image)

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 \texttt{DBID:<DBID for the IR>}. For example, if the DBID is 01MyLibrary_ir_01, use the Summon search syntax \texttt{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

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.
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](https://developers.exlibrisgroup.com/) using your institution-specific user name and password:

   ![My APIs Page](image1)

2. On the My APIs page ([Ex Libris Developer Network > Build My APIs](https://developers.exlibrisgroup.com/), select **API Keys > Manage Keys**.

   ![Add/Edit API Key Dialog Box](image2)

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 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]
```

**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.

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.

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.

   - If you would like to display a type of link (Catalog or Provider) first, move it to the top of the Enabled column.

4. Save your settings.

Example of Both Provider and Catalog Links Displayed - Catalog Given Priority

Merged Catalog Record Link Prioritization Settings
Publishing Records to Summon

Before any searches can be performed in Summon, the bibliographic records and subscription information for electronic records must be published from Alma to Summon. The following jobs are run regularly in Alma to keep this information up to date:

- Publish bibliographic records to Summon
- Publish electronic holdings to Summon

Publishing Bibliographic Records

To configure publishing to Summon, you must have one of the following roles:

- Catalog Administrator
- Repository Administrator
- General System Administrator

The Alma publishing process is run after the bibliographic and holdings data has been populated in Alma. Alma exports the full set of records the first time and then exports the changed records daily. After Alma exports the records, Summon harvests and indexes the exported records to be searched and viewed by end users with Summon.

The publishing profile allows you to configure the settings used to publish the records to Summon.

To publish Alma records to Summon:

1. During the creation of the Summon Profile, an SFTP account is created for you. Professional Services will configure the SFTP connection to allow information to be harvested in Summon (for more details, see Configuring S/FTP Connections).

   **Note**

   - To configure and test a new SFTP connection, a user name and password is required.
   - A subdirectory should not be specified in the configuration of the SFTP connection. It cannot be located elsewhere on the file system.
   - Port 2022 should be specified in the configuration of the SFTP connection.

2. Open the Publishing Profiles page (Resources > Publishing > Publishing Profiles).
3. Edit the **Publish bibliographic records to Summon** profile row.

The Publishing Profile Details page appears.

4. Configure the Publishing Profile Details page parameters as described in the table below:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile Details section:</strong></td>
<td></td>
</tr>
<tr>
<td>Profile Name and Update these fields as required.</td>
<td></td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Description</td>
<td>If this option is selected, the system publishes all records, replacing previously published data. If this option is not selected, the system publishes records that have changed since the last time they were published. This includes bibliographic records that were added, updated, deleted, and linked to inventory records that changed. After going live, see Republishing a New Full Load.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>Full publishing publishes only non-deleted records. You must also make sure that old records that have been deleted/suppressed from Alma are treated as expected.</td>
</tr>
<tr>
<td>Scheduling</td>
<td>From the drop-down list, select one of the scheduling options that are preconfigured by Ex Libris staff.</td>
</tr>
<tr>
<td>Email Notifications</td>
<td>Opens the Email Notifications for Scheduled Jobs page, which allows you to specify which users and email addresses will receive email notifications when the publishing profile has completed. You will have the option to choose whether to send the notifications for successful jobs and/or jobs that contain errors.</td>
</tr>
<tr>
<td>Status</td>
<td>Select <strong>Active</strong>.</td>
</tr>
<tr>
<td><strong>Submission Format section:</strong></td>
<td></td>
</tr>
<tr>
<td>FTP configuration</td>
<td>By default, the publishing process places the exported files in a directory that Summon uses to harvests the files. This field specifies a predefined profile that contains the FTP information. If the transfer fails, the system includes a link to the published files in the publishing report.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>The directory must be configured in advance because Alma cannot create it.</td>
</tr>
<tr>
<td>Sub-directory</td>
<td>From the drop-down list, select the name of the S/FTP connection that you previously defined.</td>
</tr>
<tr>
<td>Content Options section:</td>
<td></td>
</tr>
<tr>
<td>Electronic, Physical, and Digital</td>
<td>Select the check box next to the type of records that you want to publish.</td>
</tr>
</tbody>
</table>
### Parameter Description

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note</strong></td>
<td>To enable digital full-text publishing, contact Ex Libris Support.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Course Information Enrichment</th>
<th>Select this check box to publish course reserves information to Summon. For more details, see <a href="#">Enabling the Course Reserves Facet in Summon</a>.</th>
</tr>
</thead>
</table>
| Physical Inventory Enrichment section: | **Quick Add area**  
The following fields in the Quick Add area allow you to map holdings tags/subfields from the holdings record to tags/subfields in the published bibliographic record: **Holding Tag**, **Holding Subfield**, **Bib Tag**, and **Bib Subfield**.  
After you have entered the above mapping data, select **Add** to add the new mapping to the list. |

5. Select **Save**. The modified publishing profile appears activated on the Publishing Profiles page. Data that meets the defined criteria is exported to the specified FTP location when the profile is run (either manually or according to the selected schedule).

The Publishing bibliographic records to Summon job publishes up to 1000 relations per bibliographic record.

For information on monitoring a publishing export job, see [Viewing Running Jobs](#). For information on the job report, see [Viewing Completed Jobs](#).

**Note**  
Because job monitoring can report a successful completion even when the FTP has failed, it is important to check the job report for errors.

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## Publishing Electronic Holdings

To configure publishing to Summon, you must have one of the following roles:

- Catalog Administrator
- Repository Administrator
- General System Administrator

Alma publishes the activation status of electronic holdings (all unsuppressed holdings) to Summon in the files, which Summon then uses to determine the full text availability of electronic holdings for each institution.

To publish electronic holdings to Summon, you must configure and run a publishing profile in Alma. The publishing profile allows you to configure the settings used to generate the electronic holdings file that Summon uses to update the status indicators. This process should be run weekly to make sure that the holdings information is accurate.

**To configure the publishing profile for Summon publishing:**
1. Open the Publishing Profiles page (Resources > Publishing > Publishing Profiles)

2. Edit the Publish electronic records to Summon profile row.

   The Publishing Profile Details page opens.

3. Configure the items on the Publishing Profile Details page parameters as described in the table below:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile Details section:</strong></td>
<td></td>
</tr>
<tr>
<td>Profile</td>
<td>Update these fields as required.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Name and Description</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Scheduling</strong></td>
<td>From the drop-down list, select one of the scheduling options that are preconfigured by Ex Libris staff.</td>
</tr>
<tr>
<td><strong>Email Notifications</strong></td>
<td>Opens the Email Notifications for Scheduled Jobs page, which allows you to specify which users and email addresses will receive email notifications when the publishing profile has completed. You will have the option to choose whether to send the notifications for successful jobs and/or jobs that contain errors.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Select Active.</td>
</tr>
</tbody>
</table>

**Submission Format section:**

**FTP configuration**

By default, the publishing process places the exported files in a directory that Summon uses to harvest the files. This field specifies a predefined profile that contains the FTP information. If the transfer fails, the system includes a link to the published files in the publishing report.

**Note**

The directory must be configured in advance because Alma cannot create it.

From the drop-down list, select the name of the S/FTP connection that you previously defined.

**Sub-directory**

The subdirectory in which the exported files are placed.

**Global parameters:** (The parameters in this section are published to Summon daily. It is not related to the Electronic publishing process, but it appears with the electronic publishing options in Alma.)

**Summon name**

The unique name used in the URL of your Summon instance. Saving the Summon name field triggers creation of the Summon profile.

**Proxy selected**

Select the type of proxy server that you are using. Alma supports the following types: EZProxy, LIBProxy, OpenAthens, and WAM.

**Catalog name**

Enter the display name for the library catalog. The name will display in the source field in the Summon results record.

**Catalog URL**

The catalog name displayed in the Summon record can be hyperlinked to a relevant URL—for example, to the library.
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>website.</td>
<td></td>
</tr>
<tr>
<td>Publish library location</td>
<td>Specify the level at which location information (which may appear in Summon facets, for example) is displayed to users:</td>
</tr>
<tr>
<td></td>
<td>◦ Library – Informs Summon to display only the library (for example, Main Library).</td>
</tr>
<tr>
<td></td>
<td>◦ Both Library and Location – Informs Summon to display both the library and location (for example, Main Library Reference Desk).</td>
</tr>
<tr>
<td></td>
<td>◦ Location – Informs Summon to display only the library's location (for example, Reference Desk).</td>
</tr>
<tr>
<td></td>
<td>◦ None – Informs Summon not to display library and location information.</td>
</tr>
<tr>
<td>Add IP range (begins and</td>
<td>Some content providers limit searches to requests from authorized IP ranges. Enter the institutional IP ranges to ensure that content from these</td>
</tr>
<tr>
<td>ends)</td>
<td>providers is not excluded from Summon search results.</td>
</tr>
<tr>
<td></td>
<td>If a patron is accessing Summon from outside the library, and is not using a proxy, content from providers who require IP authentication are</td>
</tr>
<tr>
<td></td>
<td>excluded from search results. If the patron is at a workstation in the library and the library's IPs are registered with Summon, the patron will</td>
</tr>
<tr>
<td></td>
<td>also see search results for providers who require IP authentication.</td>
</tr>
</tbody>
</table>

4. Select **Save** to save the changes to the export publishing profile.

**Republshing a New Full Load**

After going live, Ex Libris recommends a quarterly full export that completely overwrites the existing catalog. In doing so, this allows us to provide you with more efficient and quality service. Quarterly exports are looked at by our QA catalog experts to make sure that they are properly encoded and that nothing has changed. After the export has been checked, it is loaded into the index. Also, by uploading full quarterly loads into the index, the indexing process becomes more efficient. If this task is performed quarterly and you have a major change in your catalog, we will be able to process the new full load faster than if we had not processed a full load for many months.

**Note**

The full update will take two to three weeks to complete.

**To republish a new full load:**

1. Edit the **Publish bibliographic records to Summon** publishing profile ([Resources > Publishing > Publishing Profiles](#)) and select the **Run full publishing** check box. The full publishing job will run automatically at the next scheduled update.

2. When the full publishing job completes:

   1. Edit the **Publish bibliographic records to Summon** publishing profile ([Resources > Publishing > Publishing Profiles](#)) and make the following modifications:

      ▪ Clear the **Run full publishing** check box.
• Set the **Scheduling** field to *Not Scheduled*.

2. Submit a new Full Load request through the Customizer ([Content Ingestion > New Full Load](#)). This will create an internal ticket for the Summon Metadata Librarians (MDLs). For more information, see [Summon: Submitting a Full Load of Library Catalog](#).

3. When the load is live in about two to three weeks, edit the **Publish bibliographic records to Summon** publishing profile ([Resources > Publishing > Publishing Profiles](#)) and set the **Scheduling** field to its normal update frequency.
Display Configuration

This section includes:

- 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
Configuring the Services Page

As a link resolver, Alma provides services for searches performed in sources other than Alma (such as Summon or Google Scholar). Alma’s link resolver uses the Services page, which is a dedicated page that displays a record’s services (such as access to full text).

![Example Services Page With View It Services](image)

In order for third-party sources to display Alma services, you must instruct the sources to send a base URL in the following format to Alma:

```plaintext
https://<Alma_domain>/discovery/
openurl?institution=<Alma_institution_code>&vid=<view_code>
```

Where the base URL includes the following elements:

- **Alma_domain** – Specify the domain for your Alma’s server.
- **Alma_institution_code** – Specify the institution code defined in Alma.
- **view_code** – Specify the code that is defined for your view on the View Configuration page. For example: 01MY_INST:Services.

For example:

```plaintext
https://na01.alma.exlibrisgroup.com/discovery/
donurl?institution=01MY_INST&vid=01MY_INST:Services
```

**Note**

If your vendors do not support the above format, which includes a question mark (?) before the parameters, use the following format:
To add the Services page view:

1. On the Views List page (Configuration Menu > Discovery > Display Configuration > Configure Views), select **Add** to open the View Configuration page.

2. Specify the following fields on the View Configuration Page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Enter Services. After saving the view, the system will automatically prefix the code with the institution code.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter Services.</td>
</tr>
<tr>
<td>Description</td>
<td>Optional text to describe the view for internal use.</td>
</tr>
<tr>
<td>General Attributes:</td>
<td></td>
</tr>
<tr>
<td>Time-out URL</td>
<td>Specify the redirection URL for the Services page after a timeout.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Timeout (in minutes) for guest users</td>
<td>The time in minutes when a session is timed out due to inactivity for guest users. A setting of 0 indicates that there is no timeout period. When a session times out, the system clears all personal parameters and refreshes the page, leaving the user within the context of the page.</td>
</tr>
<tr>
<td>Timeout (in minutes) for signed-in users</td>
<td>The time in minutes when a session is timed out due to inactivity for signed-in users. A setting of 0 indicates that there is no timeout period. When a session times out, the system clears all personal parameters and refreshes the page, leaving the user within the context of the page.</td>
</tr>
<tr>
<td>Default Language</td>
<td>Select the default language that the system will use for the Services page.</td>
</tr>
<tr>
<td>Select as Default View</td>
<td>Indicates which view is used when staff users select the Display in Discovery option from the Alma repository search results.</td>
</tr>
<tr>
<td>Enable the 'Personalize Your Results' service</td>
<td>Indicates whether the Personalized Results service is enabled for the Services page.</td>
</tr>
</tbody>
</table>

3. Select **Save and continue** to save your changes and configure the other tabs on the View Configuration page.

4. Configure the Full Record Services tab:

   ![Full Record Services Tab](image)

   **Full Record Services Tab**
1. If you have not already done so, select **Customize** to allow you to edit the various services that appear as sections on the Services page. The following services are supported in Alma-Summon environments:

   - **getit_link1** – This code defines the View It, Get It, and How to Get It sections on the Services page. These sections allow users to view online materials, request physical items in the library or partner libraries, or get materials from other sources. The How to Get It section displays only general electronic services that are delivery-related (such as an ILL service), and appears when the record has no holdings. For more details, see [Adding a Delivery-Related General Electronic Service](#).

   - **browseshelf** – This code defines the Virtual Browse service, which allows users to browse items based on the location of the current item. Users will be able to navigate through items on the shelf, starting at the current item’s call number.

   - **links** – This code defines the Links section on the Services page. The Links section displays general electronic services that are not delivery-related (see [Adding a General Electronic Service](#)). In addition, you can configure the following option by selecting its Configure row action:

     - **Display Source Record** - Select this check box if you want to users to be able to view the item’s source record.

   - **searchWithinJournal** – This code enables the Search for articles within a journal section. This section appears on the Journal Search page and on the Services page when the record has an ISSN, which is attached to users’ queries to allow them to search the Summon index to find articles within that journal.

   - **details** – This code enables the Details section only for records in your local catalog. It allows you to display the same fields that you can include in the brief records display, but it is meant to include additional information, which can be displayed on more than three rows. Select **Configure** to customize the display fields.

   - **citationTrailAndTimesCited** – This code defines the Citations service, which displays a record’s citation information. Select **Configure** to configure the following options:

     - **Citation Trail** – When activated, this option displays the citation trails in the Citations section.

     - **Times Cited** – When activated, this option displays the times cited information from the Web of Science service in the Citations section.

2. When customization is enabled, you can perform the following operations:

   - Change the order of the service sections by selecting the up and down arrows.
Order Service Sections

- Restore the out-of-the-box settings for the Actions section by selecting **Restore**.

5. If you want to customize the look of the Services page, see [Branding the Services Page](#).
Branding the Services Page

The look of the Services page is configured with the Customization Package Manager, which allows you to modify the css\custom1.css and js\custom.js files and any related image files under the img folder.

To customize the look of the Services page:

1. On the Views List page (Configuration Menu > Discovery > Display Configuration > Configure Views), edit the row that contains the view for your Services page.

2. Select the Manage Customization Package tab.

3. Select Download to download the customization package. If this is the first time, a template file is downloaded.

4. Unzip the package and edit the css\custom1.css and js\custom.js files as needed.

5. Make sure that the root directory for the package uses the <institution ID>-Services format—for example, 01ABC_INST-Services.

6. Zip the package.

7. Specify the name of the zipped package and select Upload.

Adding a Selectable Logo

The Manage Customization Package tab on the View Configuration page (Configuration Menu > Discovery > Display
Configuration > Configure Views allows you to upload a new logo and define a link that opens a page when users select the logo.

To upload a new logo:

1. Edit your view on the View Configuration page (Configuration Menu > Discovery > Display Configuration > Configure Views).
2. Select the Manage Customization Package tab.
3. In the Upload Logo section, select an image to upload in the Upload Logo File field and then select Upload.
4. If you want the image to be selectable, specify the redirection URL in the Logo Selectable URL field.
5. Select Save to save your customizations to the view.
Managing Display and Local Fields

For local MARC records, Alma maps display, search, facets, resource types for discovery in the Services page. The Display Fields page (Configuration Menu > Discovery > Display Configuration > Manage Display and Local Fields) allows you to perform the following additional configurations:

- Modify the normalization rules used to display information for the out-of-the-box display fields. For more information, see Adding a Display Field.
- Create local fields Primo VE for which you can extend search queries, filter search results, and display additional information in the record’s brief and full displays. For more information, see Adding a Local Field.

Adding a Local Field

The Define a Local Field page allows you to map information (such as notes) from the following MARC21 and UNIMARC fields in the source records to local fields in Alma, where these fields can then be used to display additional information in the record's full display and to customize the presentation of local display fields by creating normalization rules:

- **MARC21**: 009, 09X, 490, 5XX, 69X, and 9XX

**Note**

Alma allows you to configure up to 50 local fields per format.
To add a local field:

1. On the Display Fields page (Configuration Menu > Discovery > Display Configuration > Manage Display Fields), select **Add local field** from the **Add field** drop-down list to open the Define a Local Field page.

2. Specify the following fields:
   - **Field to edit** – Select the local field that you want to use.
   - **Display label** – Specify a display label for the information that you are mapping from the source records.
     Select the Globe button if you want to create translations for the label in the Local Fields Labels code tables. For more information, see Configuring Display Labels.

3. Select the **Bibliographic Local Field Mapping** tab to configure the local field's intended usage and mapping.

4. Specify the following fields in the **Local field details** section:
   - **Use Translations** – When this option is selected, Alma will display the translations that are defined in the Local Field Translate code table for the local field's values. For more information, see Configuring Translations for Local Display Values. If no translation is provided, Alma will display the value provided by the source record.
   - **Use full text links for indexing** – Select this option if you want to index the externally-held full text file (which can be of type PDF, TXT, or HTML) to which this field links in the bibliographic record. During the indexing of the local fields, Alma will perform the following actions on each of the full text records:
     - Remove stop words based on the language.
     - Remove HTML tags.
     - Index up to 10,000 terms.

**Note**

You can assign this capability to a single local field only.
5. Depending on the source format, select Add MARC21 fields or Add UNIMARC fields to open a format's dialog box:

1. Select a field from the drop-down list.

![Add a MARC21 Field Dialog Box](image)

2. Select Add to save the assignment.

6. Repeat step 4 if you want to map multiple MARC/UNIMARC fields to a single local field. Note that you cannot map more than 20 fields to a single local field.

![Multiple MARC Fields Mapped to a Local Field](image)

7. Select the **Normalization Rules (for display)** tab to customize the presentation of the local display field in your view.

![Define a Local Field Page - Normalization Rules Tab](image)
8. In the **Marc21 Normalization Rule** section, edit the Marc21 normalization rule row to display the template for the local field.

![Normalization rule for local_field_03](image)

**Normalization Rules Editor for Local Field (Local Field Template)**

---

**Note**

Alma provides a normalization template to assist in the creation of the field's normalization rule.

---

9. When you are finished with the normalization rule, you can either save your changes (**Save**), cancel changes to current session (**Close**), or restore the default template (**Restore Default**).

10. Update the normalization rule as needed. For more information, see Configuring Normalization Rules for Display and Local Fields.

11. Select **Save** to create the local field and to return to the Display Fields page.

12. If you have created or modified existing normalization rules for a field, select **Apply rules** on the Display Fields page to update your records.

13. To utilize a new local field, perform the following actions in the view:

   - Add a field to a Display line – See the instructions for the Brief Record Display tab in Configuring the Services Page.

   - Add a field to the Details section – See the instructions for the Full Record Display tab in Configuring the Services Page.

---

**Adding a Display Field**

The Define a Display Field page allows you to customize the presentation of local display fields by creating MARC21 normalization rules.

![Define a display Field](image)

**Define a Display Field Page**
To add a display field:

1. On the Display Fields page (Configuration Menu > Discovery > Display Configuration > Manage Display Fields), select **Add display field** from the **Add field** drop-down list to open the Define a Display Field page.

2. Select an out-of-the-box display field from the **Field to edit** drop-down list.

3. In the **Marc21 Normalization Rule** section, edit the Marc21 normalization rule row to display the out-of-the-box normalization rule for the selected display field.

4. When you are finished with the normalization rule, you can either save your changes (**Save**), cancel changes to current session (**Close**), or restore the out-of-the-box normalization rule (**Restore Default**).

5. Update the normalization rule as needed. For more information, see Configuring Normalization Rules for Display and Local Fields.

6. Select **Save** to create the display field and to return to the Display Fields page.

7. If you have created or modified existing normalization rules for a display field, select **Apply rules** on the Display Fields page to update your records.

**Configuring Translations for Local Display Values**

The Local Field Translate code table allows you to define translations for the local display field values. If the **Use Translations** option is selected for a local field and a translation is not defined in the table, the Services page will display the value supplied in the source record.

To create a translation for a local field's value:

1. Edit the Local Field Translate code table (Configuration Menu > Discovery > Display Configuration > Labels). The first time that you modify the table, you will need to select **Customize**.

2. From the **Filter** drop-down list, select **English**. The English version will be used as the default for other languages if they are not defined.

3. Select **Add Row** to open the Add Row dialog box.

   1. Enter the following fields:

      - **Code** – Enter the value that you are mapping from the source record's MARC subfield. For example, if you
are mapping 907 $a 610medicineAndHealth from the source record, enter
610medicineAndHealth.

- **Description** – Enter the English translation. For example: Medicine and Health.

2. Select **Add Row** to save your new mapping row and to return to the code table's list of rows.

4. From the **Filter** drop-down list, select the language to which you want to translate the value. For example, select **Spanish**.

5. In the **Translation** field, enter the specified language's translation. For example, enter **Medicina y Salud**.

6. Select **Save** to save your changes to the code table. The first time that you add a value, you will need to select **Customize**.

![Local Field Translate Code Table](image)
Configuring the Display Labels for Alma-Summon

The labels that display on the Services, Journal Search, and My Library Card pages are configured with various code tables under the Discovery subsystem (such as Full Display Labels code table). The values that display to end users are configured with the Description field. The following table lists the code tables that are relevant to Alma-Summon environments:

To modify a label:

1. On the Discovery Configuration menu (Configuration Menu > Discovery > Display Configuration > Labels), select Actions > Customize next to the code table that you want to edit.

### Discovery Code Tables - Partial List

The following table lists which code tables are relevant to Alma-Summon customers:

<table>
<thead>
<tr>
<th>Code Table</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aria Labels (partial)</td>
<td>Services Page</td>
</tr>
<tr>
<td>Calculated Availability Text Labels</td>
<td>Services Page</td>
</tr>
<tr>
<td>Citation Labels</td>
<td>Services Page - Actions</td>
</tr>
<tr>
<td>Digitization Labels</td>
<td>Services page - Digitization request</td>
</tr>
<tr>
<td>End User Deposit Labels</td>
<td>My Account</td>
</tr>
<tr>
<td>Code Table</td>
<td>Notes</td>
</tr>
<tr>
<td>-----------------------------------------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>Error Messages Labels (partial)</td>
<td>Error messages displayed on various pages</td>
</tr>
<tr>
<td>Fines List Labels</td>
<td>My Account</td>
</tr>
<tr>
<td>Get it service labels</td>
<td>Services Page</td>
</tr>
<tr>
<td>GetIt! Tile Labels (partial)</td>
<td>Get It service</td>
</tr>
<tr>
<td>GetIT! Tab1 Labels (some not used)</td>
<td>Services Page - service labels</td>
</tr>
<tr>
<td>Icon Codes Labels</td>
<td>Services Page - resource types</td>
</tr>
<tr>
<td>Interface Language Labels</td>
<td>For UI Languages (if UI is available in several languages)</td>
</tr>
<tr>
<td>Journal Search Labels</td>
<td>Journal Search</td>
</tr>
<tr>
<td>Keeping This Item Tile Labels</td>
<td>Services Page - Action labels</td>
</tr>
<tr>
<td>Library card Labels</td>
<td>My Account</td>
</tr>
<tr>
<td>Links and General Electronic Services Labels</td>
<td>Services Page - Links service</td>
</tr>
<tr>
<td>Loans List Labels</td>
<td>My Account</td>
</tr>
<tr>
<td>Locations Tab Labels</td>
<td>Services Page</td>
</tr>
<tr>
<td>My preferences Tile Labels (partial)</td>
<td>My Account- Personal Details</td>
</tr>
<tr>
<td>Personal Settings Labels</td>
<td>My Account</td>
</tr>
<tr>
<td>Purchase Request Labels</td>
<td>Services Page - Purchase Request</td>
</tr>
<tr>
<td>Code Table</td>
<td>Notes</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>Request Labels</td>
<td>Services Page - Requests</td>
</tr>
<tr>
<td>Request options Labels</td>
<td>Services Page- Requests</td>
</tr>
<tr>
<td>Request Tab Messages Labels</td>
<td>Services Page - Requests</td>
</tr>
<tr>
<td>Requests List Labels</td>
<td>My Account</td>
</tr>
<tr>
<td>Resource Sharing Labels</td>
<td>Services Page - Resource Sharing Request</td>
</tr>
<tr>
<td>Send Email and Sms Labels (partial)</td>
<td>Services Page - Email action</td>
</tr>
<tr>
<td>User Login Labels</td>
<td>Sign-in</td>
</tr>
<tr>
<td>User Space Menu Labels</td>
<td>My Account</td>
</tr>
<tr>
<td>User Tile Labels (partial)</td>
<td>My Account</td>
</tr>
<tr>
<td>View Labels</td>
<td>Labels defined in the View configuration are stored in this code table.</td>
</tr>
<tr>
<td>ViewIt Labels</td>
<td>Services Page - View It</td>
</tr>
</tbody>
</table>

**Note**

Subsequent changes to a table, require you to select Actions > Edit instead of Actions > Customize.

2. For each code that you want to modify, update the **Description** field to change the display label.

**Note**

- If you do not want to display a code’s label in the UI, specify **NOT_DEFINED** per language.
- The setting of the **Enabled** field has no effect on the display of the label.
3. When customizing a table for the first time, select **Customize** to save your changes and return to the Discovery subsystem page. After an initial customization, you will need to select **Save** to apply your changes.
Configuring Thumbnail Templates for Alma-Summon

The Services page provides book covers based on the ISBN/ISSN from Syndetics and Google for data managed in Alma. The Thumbnail Configuration page allows you to define additional thumbnails sources, which are based on either a URL in the bibliographic record or a template that contains parameters.

To add a thumbnail source:

1. Open the Thumbnail Configuration page (Configuration Menu > Discovery > Display Configuration > Thumbnail configuration).
2. Select Add New Template to open the Define Thumbnail Link page.
3. In the Thumbnail Details section, enter the following fields:
   - **Template Name** – Specify a name for the template.
   - **Template** – Specify the linking information (which may include a URL and/or $$LinkingParameter1) used to link to the thumbnail source. Because Primo VE’s UI is SSL secure, any thumbnail links should start with https. For example:

```
https://www.ckc.com/gp/reader/$$LinkingParameter1
```

4. If your template includes a parameter, specify the following fields in the LinkingParameter Configuration section:
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field</td>
<td>Specify the MARC tag that holds the value of the linking parameter.</td>
</tr>
<tr>
<td>Ind1</td>
<td>If necessary, specify the MARC tag's first indicator.</td>
</tr>
<tr>
<td>Ind2</td>
<td>If necessary, specify the MARC tag's second indicator.</td>
</tr>
<tr>
<td>Subfield</td>
<td>Specify the specific MARC subfield that holds the value of the linking parameter.</td>
</tr>
</tbody>
</table>

**Normalization**

This field allows you to use either the full value or a portion of the value stored in the subfield. Specify one of the following options:

- **No normalization** – Indicates that the entire contents of the subfield will be used in $\$LinkingParameter1.
- **Normalize using a regular expression** – Indicates that a portion (as determined by the regular expression) of the subfield will be used in $\$LinkingParameter1. When selected, the Normalization Pattern field appears.

**Normalization Pattern**

If normalization is required, specify the regular expression needed to extract the portion of the subfield that will be used in $\$LinkingParameter1.

5. Select **Add Row** to create the new template for the source.
Get It Configuration

This section includes:

- Configuring Display Items
- Configuring the Request Forms for Alma-Summon
Configuring Display Items

Alma allows you to configure the information that appears in the following areas under the Get It section on the record's Services page.

- **Brief item display** - This area opens instantly and can contain up to four display lines. Out of the box, Alma displays the item’s status, terms of use, and the item’s description on separate display lines if available for the item. You can configure up to four display lines. Each line can contain up to three fields, which are separated by your choice of delimiter.

![Brief Item Display - First Two Rows on Each Side (if needed)](image)

- **Full item display** - The user must select the down arrow to display the information that appears in these display lines. Out of the box, the Get It service displays the additional call number, public notes, material type, location (which includes the library, location, and call number fields), and the barcode on separate display lines if available for the item. You can configure up to 12 display lines. Each line can contain up to three fields, which are separated by a space.

![Full Item Display Section - Right Side Only](image)

**Note**

Data fields that are configured in both the brief and item display areas will display only once.

**To configure display lines in the brief and full item display areas:**

1. Open the Display Items page (Configuration Menu > Discovery > GetIt Configuration > Items Display Configuration).
2. If you have not already done so, select **Customize** in the Brief Item Display section to allow you to edit its display lines.

3. In the Brief Item Display section, you can perform the following operations:

   ◦ Activate/deactivate a display line by selecting its **Active** field.

   ◦ Add a field to a display line:

     1. Edit the row containing the display line that you want to modify. The Row Fields page opens.
     2. Select **Add** to open the Add Field dialog box.
     3. Select a field from the **Code** drop-down list.
     4. Select **Add** to add the new field and to return to the Row Fields page.
     5. On the Row Fields page, select **Add** to add additional fields to the display line.
6. Select the up/down arrows to reorder the fields in the display line.

7. Select Back to return to the Display Fields page.

Define the display line's label:

1. Edit the row containing the display line that you want to modify. The Row Fields page opens.

2. Select Edit Display Label. The Edit Display Label page opens.

3. Type the display line's label in the Label field. If you do not want a label to display, type NOT_DEFINED.

4. Select Save.

5. Select Back to return to the Display Fields page.

Define a delimiter for a display line:

1. Edit the row containing the display line that you want to modify. The Row Fields page opens.

2. Select Edit Delimiter. The Edit Delimiter page opens.

3. Type the delimiter in the Delimiter field. The default delimiter is set to a space.

4. Select Save.

5. Select Back to return to the Display Fields page.

Delete a field from a display line:

1. Edit the row containing the display line that you want to modify. The Row Fields page opens.

2. Select the display line's Delete row action.

3. Select Back to return to the Display Fields page.

Delete an entire display line:

1. Edit the row containing the display line that you want to modify. The Row Fields page opens.

2. Select the Delete row action for all fields.

3. Select Back to return to the Display Fields page.

Reorder fields on a display line:

1. Edit the row containing the display line that you want to modify. The Row Fields page opens.

2. Select the up/down arrows to reorder the fields.

3. Select Back to return to the Display Fields page.

4. If you have not already done so, select Customize in the Full Item Display section to allow you to edit its display lines.
5. In the Full Item Display section, you can perform the following operations:

- Activate/deactivate a display line by selecting its **Active** field.

- Add a field to a display line:
  1. Edit the row containing the display line that you want to modify. The Row Fields page opens.
  2. Select **Add** to open the Add Field dialog box.
  3. Select a field from the **Code** drop-down list.
  4. Select **Add** to add the new field and to return to the Row Fields page.
  5. On the Row Fields page, select **Add** to add additional fields to the display line.
  6. Select the up/down arrows to reorder the fields in the display line.
  7. Select **Back** to return to the Display Fields page.

- Define the display line's label:
  1. Edit the row containing the display line that you want to modify. The Row Fields page opens.
  2. Select **Edit Display Label**. The Edit Display Label page opens.
  3. Type the display line's label in the **Label** field. If you do not want a label to display, type **NOT_DEFINED**.
  4. Select **Save**.
  5. Select **Back** to return to the Display Fields page.

- Delete a field from a display line:
  1. Edit the row containing the display line that you want to modify. The Row Fields page opens.
  2. Select the display line's **Delete** row action.
3. Select **Back** to return to the Display Fields page.

- **Delete an entire display line:**
  1. Edit the row containing the display line that you want to modify. The Row Fields page opens.
  2. Select the **Delete** row action for all fields.
  3. Select **Back** to return to the Display Fields page.

- **Reorder fields on a display line:**
  1. Edit the row containing the display line that you want to modify. The Row Fields page opens.
  2. Select the up/down arrows to reorder the fields.
  3. Select **Back** to return to the Display Fields page.
Alma allows users to fill out various request forms so that they can provide additional information when requesting an item with the Services page. The following table lists the mapping tables that allow you to customize the various request forms:

<table>
<thead>
<tr>
<th>Link in Alma</th>
<th>Request Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digitization Request</td>
<td>Digitization Optional Parameters (see Configuring a Request Form) – This mapping table defines the optional fields that appear in digitization requests.</td>
</tr>
<tr>
<td>Hold and Booking Request</td>
<td>Request (Hold and Booking) Optional Parameters (see Configuring a Request Form) – This mapping table defines the optional fields that appear in hold and booking requests.</td>
</tr>
<tr>
<td>Purchase Request</td>
<td>Purchase Request Optional Parameters (see Configuring a Request Form) – This mapping table defines the optional fields that appear in purchase requests.</td>
</tr>
</tbody>
</table>
| Resource Sharing Request | Resource Sharing Form Customization (see Configuring the Resource Sharing Request Form) – This page contains the following sections, which allow you to configure various aspects of the Resource Sharing Request form:
  - **Resource sharing request fields** – This section configures the general fields, which apply to book and article requests. This section allows you to specify the order of fields, show/hide fields, and indicate which fields users must populate.
  - **Book request** – This section configures the fields associated with book requests. This section allows you to specify the order of fields, show/hide fields, and indicate which fields users must populate.
  - **Article request** – This section configures the fields associated with article requests. This section allows you to specify the order of fields, show/hide fields, and indicate which fields users must populate.
  - **Delivery fields** – This section configures the fields associated with the delivery of the book or article. This section allows you to specify the order of fields, show/hide fields, and indicate which fields users must populate. In addition, some of the fields allow you to specify a default, which may be useful when hiding a field.

The Copyrights field enables the Copyrights dialog box that appears after a user submits a resource sharing request. The following mapping codes are associated with the labels in the Copyrights dialog box:


The Resource Sharing Labels code table (see Modifying Labels on Request Forms) allows you to modify the labels that display on the Resource Sharing Request form and the Copyrights dialog box.

For requests other than resource sharing requests, you can decide which fields to display to the end users and also provide a default value for each field.

**To configure a request form other than the Resource Sharing Request form:**
1. Select the following links listed under Configuration Menu > Discovery > GetIt Configuration >: Digitization Requests, Hold and Booking Request, or Purchase Request.

2. Select Customize to allow the form to be customized. You only need to do this the first time.

3. In the Display to Public column, select Yes (viewable to users) or No (not viewable to users) for each field.

4. In the Default column, specify a default value for the field if necessary. An empty field indicates that there is no default value for the field.

5. Select Save to save your changes to the mapping table.

For resource sharing requests, you can decide which fields to display to the end users, indicate whether a field is required, and also provide a default value for some fields.

To configure the Resource Sharing Request form:


2. Select Customize to allow the form to be customized. You only need to do this the first time.

3. Select the Mandatory check box if the user must specify this field in the form.

4. Select the Visible check box if you want this field to appear on the form.

5. In the Default column, specify a default value for the field if necessary. An empty field indicates that there is no default value for the field.

6. Select Save to save your changes to the mapping table.
User Authentication for Alma-Summon

Alma supports a number of authentication schemes, which are defined using integration profiles. An institution may choose to use more than one of the following authentication schemes:

- LDAP
- SAML based authentication such as Shibboleth
- CAS
- OAuth based authentication with Facebook, Google, Twitter or using email
- Alma internal users

For information on configuring external authentication systems, see Integrations with External Systems. For information about the Ex Libris Identity Service, see https://developers.exlibrisgroup.com/alma/integrations/user-management/authentication/exl_identity_service.

Login Pages

The User Authentication page (Configuration Menu > Discovery > Authentication > User Authentication) allows you to enable authentication profiles and to configure the help links and labels that display on the login pages for Alma.

If multiple profiles are defined and activated, the system will display the Parallel Login page, which allows users to select the type of authentication to use to sign in to Alma. You can display up to five links on the Parallel Login page.
After users select an authentication method, they will receive the appropriate login page for the selected authentication method.

**Configuring the Login Links**

The Profiles tab on the User Authentication page allows you to enable a maximum of five login links, which allow users to select a type of authentication to use to log on to the system.

**To enable the login links:**

1. Open the User Authentication page (Configuration Menu > Discovery > Authentication > User Authentication) and select the Profiles tab (which is the default).
In the Authentication Profiles section, activate the types of authentication that you want to provide to users. If multiple authentication types are enabled, the system will display the Parallel Login page to users.

3. Select Save.

Configuring the Help Links

The Profiles tab on the User Authentication page allows you to configure up to four help links. For each help link, you can specify a label and a URL for the help page.

To configure the help links:

1. Open the User Authentication page (Configuration Menu > Discovery > Authentication > User Authentication).
2. Select the Profiles tab (which is the default tab).

3. Select Edit next to the login link for which you want to add a help page.

Define Help Link Page

4. Specify the label and URL for the help page.
5. Select Save.
Configuring the Labels

The Labels tab on the User Authentication page allows you to configure various labels on the login pages.

To configure the labels:

1. Open the User Authentication page (Configuration Menu > Discovery > Authentication > User Authentication) and select the Labels tab.

2. Use the following table to configure the fields associated with each label:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>login.login</td>
<td>The label for the Login button.</td>
</tr>
<tr>
<td>login.cancel</td>
<td>The label for the Cancel button.</td>
</tr>
<tr>
<td>login.password</td>
<td>The label for the Password field.</td>
</tr>
<tr>
<td>parallel.login.link1</td>
<td>The label for login link 1 if parallel authentication methods exist.</td>
</tr>
<tr>
<td>parallel.login.link2</td>
<td>The label for login link 2 if parallel authentication methods exist.</td>
</tr>
<tr>
<td>login.error.message</td>
<td>The error message that display when users are unable to sign in.</td>
</tr>
<tr>
<td>login.title</td>
<td>The label for the title of the sign-in page.</td>
</tr>
<tr>
<td>login.userid</td>
<td>The label for the User ID field.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>login.dual.title</td>
<td>The label for the title of the parallel login page.</td>
</tr>
<tr>
<td>parallel.login.description1</td>
<td>The label for description field 1 on the parallel login page.</td>
</tr>
<tr>
<td>parallel.login.description2</td>
<td>The label for description field 2 on the parallel login page.</td>
</tr>
</tbody>
</table>

3. Select **Save**.
Other Configuration

This section includes:

- 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
Adding a Delivery-Related General Electronic Service

In addition to services found in your own collection (such as full text, requests, and so forth), Alma enables you to define general HTTP services (such as searches in ProQuest dissertations and Amazon.com, Ask a Librarian, and so forth) to present to patrons in the View It, Get It, and How to Get It sections on the Services page. Services that allow users to access or purchase the materials are considered delivery-related and will appear in the View It, Get It, and How to Get It sections on the Services page.

**Note**

Services that are not delivery-related appear as links under the Links section on the Services page.

To configure a delivery-related general electronic service in Alma:

1. On the General Electronic Services page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > General Electronic Services), select **Add Service**. The Add Service dialog box appears.

   ![Add Service Dialog Box](image)

2. Enter the service information (see Adding a General Electronic Service) and include the following fields:
   - **Is this a Document Delivery/ILL Service** – Select **Yes** to indicate that this service provides access to the resource. If **No** is selected, links to the general electronic service will display in the Links section.
   - **Display Location** – Select which sections that the delivery links will appear on the Services page. The following
options are permitted:

- Getit & How to Getit
- Viewit & How to Getit
- Getit, viewit, and How to Getit
- None

---

**Note**

The How to Get It section displays only when a record has no inventory. Typically, the How to Get It section is used for resource sharing and relevant ILL service links.

---

3. Select **Add and Close**.

4. On the General Electronic Services Page, select **Actions > Edit** to configure additional service details for your new service. For more details, see [Adding a General Electronic Service](#).

5. Select **Save**.
Configuring a Custom URL and Public Name for Electronic Collections

Return to menu

The Electronic Collection Editor allows you to customize the Electronic Collection Level URL that links users to the collection. This may be necessary if you need to include client-specific parameters (such as an account ID) to the Electronic Collection Level URL that was provided during the activation of the electronic collection. For more information, see Working with Electronic Collection Bibliographic Records and URLs Added to the Community Zone.

You may also use the Electronic Collection Editor to customize the Electronic Collection public name that appears for users when searching with Summon.

Customizing the URL

To customize the URL:

1. Search for the electronic collection that you want to update.

![Local Repository Search for Collection](image)

2. Select Edit Collection to open the Electronic Collection Editor. For more information, see Editing Electronic Collection Fields.

3. Open the Additional tab.
4. Change the value of the Level URL (Override) field.

5. Select Save to save your changes to the electronic collection. After the bibliographic records have been published to Summon, the customized URL will become active in 24 to 48 hours.

---

**Customizing the Public Name**

**To customize the public name:**

1. Search for the electronic collection that you want to update.

2. Select Edit Collection to open the Electronic Collection Editor. The Electronic Collection Editor opens to the Electronic Collection Description tab. For more information, see Editing Electronic Collection Fields.

3. Enter or change the value in the Public name (override) field.

4. Select Save to save your changes to the electronic collection. After the bibliographic records have been published to Summon, the customized public name will become active in 24 to 48 hours.
Configuring the WPM Education E-Payment System for Alma-Summon

To enable this functionality in My Library Card:

1. Create an Online Payment integration profile in Alma, which is existing functionality. For more information, see Configuring the WPM Education E-Payment System.

2. Set the new parameter `online_payment_link` to `true` in the Discovery Customer Settings mapping table (Configuration Menu > Discovery > Other > Customer Parameters). For more information, see Discovery Customer Settings.

3. If needed, modify the display label for the new code `fines.payfinelink` in the Library Card Labels code table (Configuration Menu > Discovery > Display Configuration > Labels). For more information, see Configuring the Display Labels for Alma-Summon.
Discovery Customer Settings

The Discovery Customer Settings mapping table (Configuration Menu > Discovery > Other > Customer Settings) contains global settings that pertain to discovery. Each row of the table contains a parameter, which can be customized to change settings or enable/disable functionality.

To customize a parameter:

1. Select the Customize row option if you have not already done so. Otherwise, select the Edit row option.
2. Enter a value in the parameter value field.
3. Select Save to save your changes to the table.

The following parameters are configurable:

<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
</table>
| cjk_segmentation    | This parameter configures the way that search strings with Chinese characters are divided into searchable tokens since words are not separated by spaces. The following search methods are supported:  

  - **OnegramWithBasis** – ("A B C D") OR ("A B" "C D") OR (A B C D)
  - **Basis** – ("A B C D") OR ("A B" "C D")
  - **Onegram** – ("A B C D") OR (A B C D)  

| kanopy and kanopy_latest | Kanopy is an on-demand streaming service that allows institutions to provide access to a large collection of films. During the activation of these services, you must also configure the template that Alma uses to link users to these streams.  

To configure these templates, you must replace **INSTITUTIONID** with your site-specific base URL prefix. For example, if the prefix for the University of Testing is **unt**, your template would look something like the following:  

http://unt.kanopystreaming.com/node |
<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>naxos_jazz_library,</td>
<td>Naxos is an on-demand streaming service that allows institutions to provide access to a large collection of films, documentaries, and music. During the activation of these services, you must also configure the template that Alma uses to link users to these streams. To configure these templates, you must replace INSTITUTIONID with your site-specific base URL prefix. For example, if the prefix for the University of Testing is unt, your template would look something like the following: <a href="http://unt.naxosmusiclibrary.com/catalogue">http://unt.naxosmusiclibrary.com/catalogue</a></td>
</tr>
<tr>
<td>naxos_music_library,</td>
<td></td>
</tr>
<tr>
<td>naxos_spoken_word,</td>
<td></td>
</tr>
<tr>
<td>naxos_video</td>
<td></td>
</tr>
<tr>
<td>online_payment_link</td>
<td>When set to true, the link to the WPM Education E-Payment System is enabled in My Library Card to allow patrons to pay fines and fees online. For more information, see Configuring the WPM Education E-Payment System.</td>
</tr>
<tr>
<td>Syndetics_Unbound_Customer_ID</td>
<td>Specify the license ID that was received during the registration of the Syndetics Unbound service. When this field is defined, you can enable this service at the view level (Configuration Menu &gt; Discovery &gt; Display Configuration &gt; Configure Views). For more information, see Setting Up Syndetics Unbound for Alma-Summon.</td>
</tr>
</tbody>
</table>
End User Help

This section includes:

- [Using Journal Search](#)
- [Using the Course Reserves View](#)
- [Using the Services Page](#)
Using Journal Search

Journal Search (which is managed by Alma) is an enhanced user experience with auto-complete functionality that is generated from the journals held by the library as per the activation of the journals in Alma. In contrast to other link resolvers, Journal Search generates a full journal list that includes both electronic and physical journals held by the library. This allows users to limit results to electronic or physical results with the Availability facet.

The maximum number of results per page is 10 (not configurable), and each result contains the following information: resource type, thumbnail, title, creator, date, availability, and actions (such as Citation and Email). Users can sort the results by either relevance (ranking of indexed records) or alphabetically by title.

The following enrichments are included in Alma CZ records and displayed in Journal Search:

- **Journal open access indicator** - The relevant Alma CZ records for journals have been enriched with an open access indicator, which is based on Ulrich's (506 0_ $f Unrestricted online access $2 star) setting.

- **Journal peer review indicator** - The relevant Alma CZ records for journals have been enriched with a peer review indicator, which is based on Ulrich's (500 $a Referred/Peer-reviewed) setting.
The following table describes the Alma Discovery settings that support this functionality.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
</table>
| Journal Search Labels code table | The following codes support the display labels associated with the Journal Search search box:  
  - nui.journalsearch.title: **Journal Search**  
  - nui.journalsearch.searchbox.help: **Title or ISSN**  
  - nui.journalsearch.searchwithin.desc: **Search for articles within this journal**  
  - nui.journalsearch.searchwithin.help: **Article title or keyword** |
Using the Course Reserves View

The Course Reserves View allows you to display all course reserves defined for your institution, to search for a specific course ID, description, or instructor, and to view all items for a course.

**Note**

In addition to the Course Reserves View, users will be able to discover course reserve materials in the regular Summon search results if the course reserves facet is enabled. For more information, see [Enabling the Course Reserves Facets in Summon](#).

After selecting the Course Reserves tab, Summon displays a scrollable list that contains all of the active courses for the institution, which are defined in Alma/Leganto.

**Course Reserves View**

If the list contains many course reserves, you can search for specific course IDs, descriptions, and instructors by entering search terms in the view's search box.

**Searching for Course Reserves**

**Note**

If you want to start over, select `New Search` to clear the search box and display all course reserves.

Selecting a course from the search results queries the Summon Index for all bibliographic records that belong to the course reading list.
Selecting an item from the list of bibliographic records displays the Alma Services page for an item, which allows you to view or request an item.

Displaying a Course's Records

Selecting an item from the list of bibliographic records displays the Alma Services page for an item, which allows you to view or request an item.

Viewing an Item on a Course's List

Selecting an item from the list of bibliographic records displays the Alma Services page for an item, which allows you to view or request an item.
Using the Services Page

The Services page displays detailed information for an item, allows users to access their Library Cards, and select any of the following services for an item, if available:

- **View Online** – Display full text for electronic material. Users may need to sign in to view online materials.
- **Get It** – Place requests for items held by the library. Users must sign-in to view request options.
- **Virtual Browse** – Browse for items that are near the selected item on the virtual bookshelf.
- **Links** – Link to additional information related to the item.

For configuration information, see [Configuring the Services Page](#).

The Services Page

If configured, users can search within a journal from the Services page. Otherwise, discovery is mainly performed using the Summon user interface.

Journal Search

To access the Services Page:
1. Perform a search in the Summon UI.

2. Select an item's title to open the Services page.

3. Select a service for an item.