Introducing the Enhanced Integration of Sierra via Summon



October 2021

Presented by:
Susan Johns-Smith
Systems Librarian / University Professor
Axe Library / Library Services, Pittsburg State University

And Brent D. Cook
Director, Product Management, Summon

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Agenda



- Project Overview
- Features Available in Sierra via Summon
- Early Adopter: Pittsburg State University
- How and when to preview
- Continued SvS Development

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Panelists for Sierra Via Summon



Susan Johns-Smith
Systems Librarian / University Professor
Axe Library / Library Services, Pittsburg State University



Brent D. Cook
Director
Product Management
Summon



Mike Dicus
Senior Product Manager / Team Lead, Product Mgt
Sierra

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The Sierra via Summon Integration

- Delivering More Value
  - More for Libraries
  - More for Patrons
- Phased Approach for Development
  - CAS is current focus
  - SAML will be the next phase
  - And ongoing enhancements



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Features Available in Sierra via Summon (SvS)

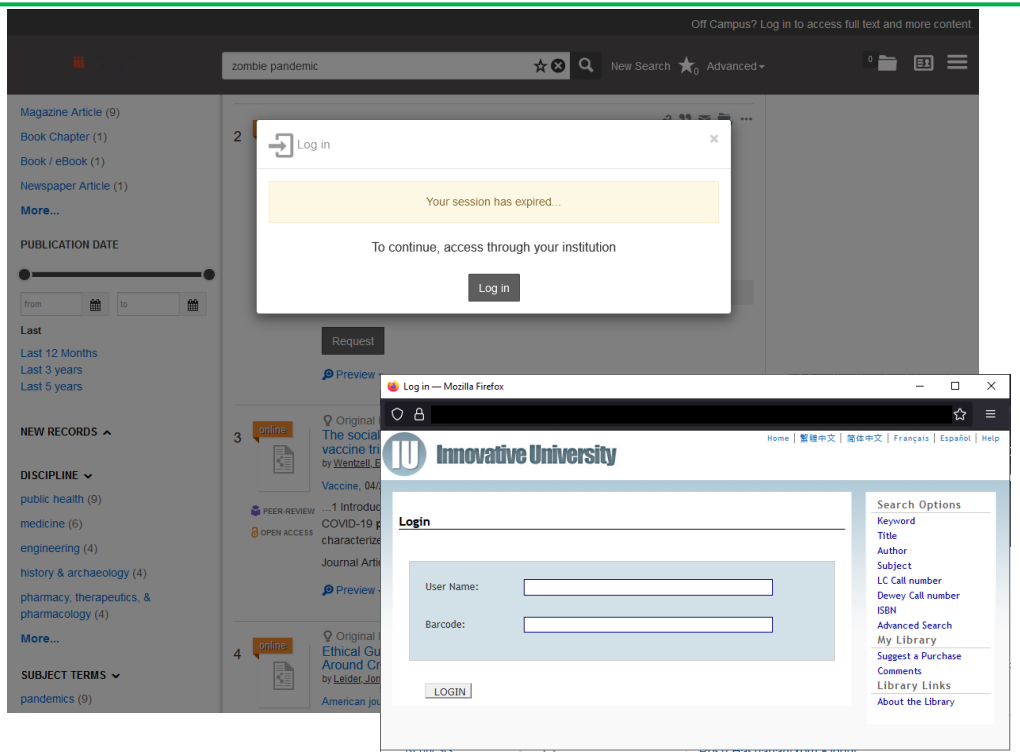
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Sierra via Summon

OPEN SYSTEM

- Patron login using CAS

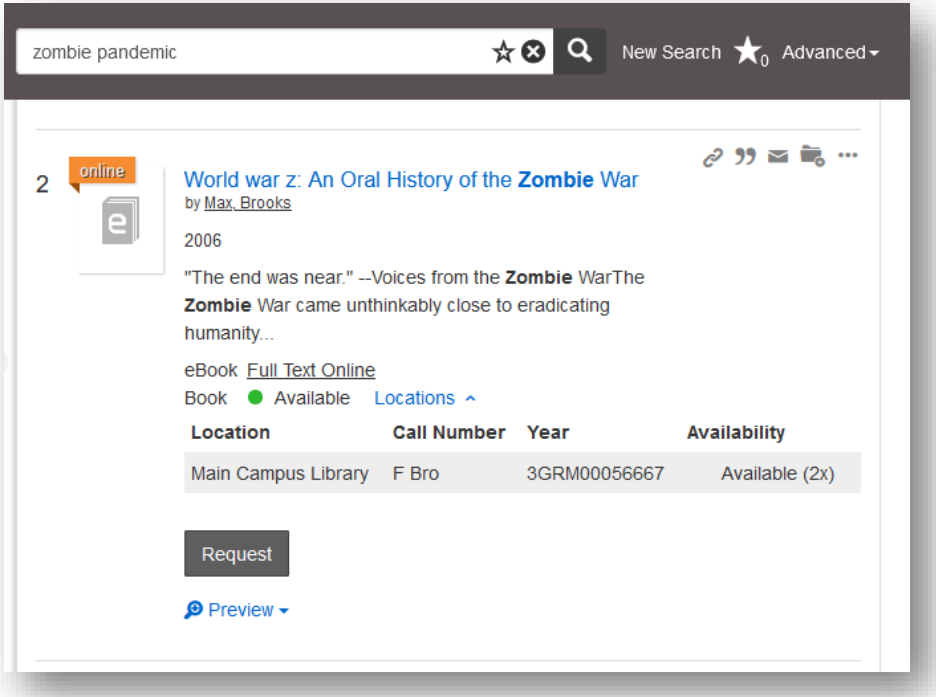


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Sierra via Summon

OPEN SYSTEM

- View availability and perform requests from the results page

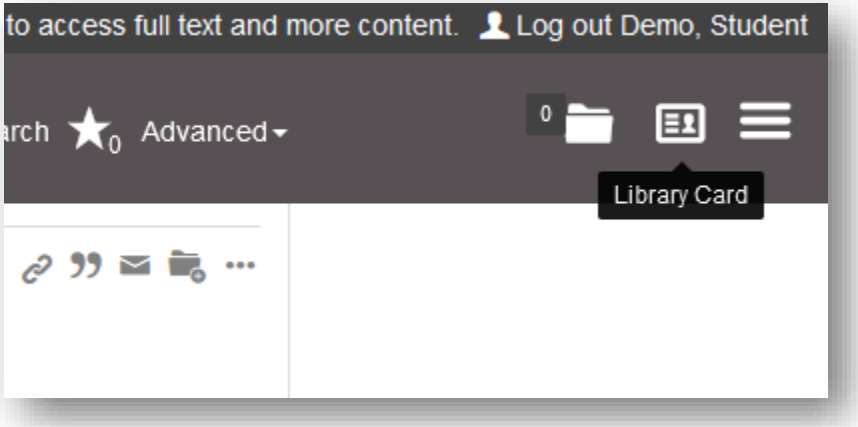


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Sierra via Summon

OPEN SYSTEM

- View library account information, including loans, requests, fines and fees



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Early Adopter Demo:
Pittsburg State University

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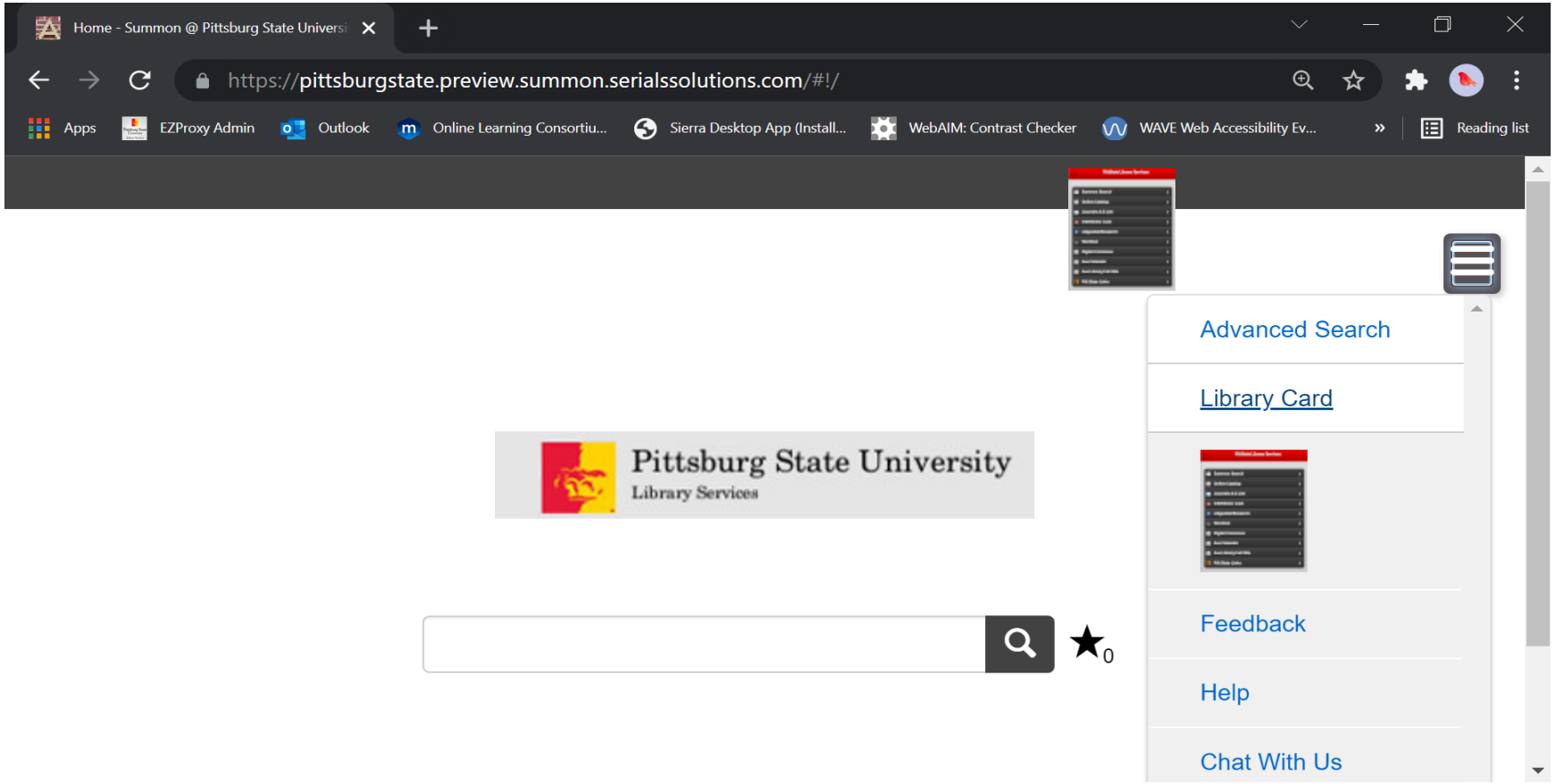


Pittsburg State University
Library Services

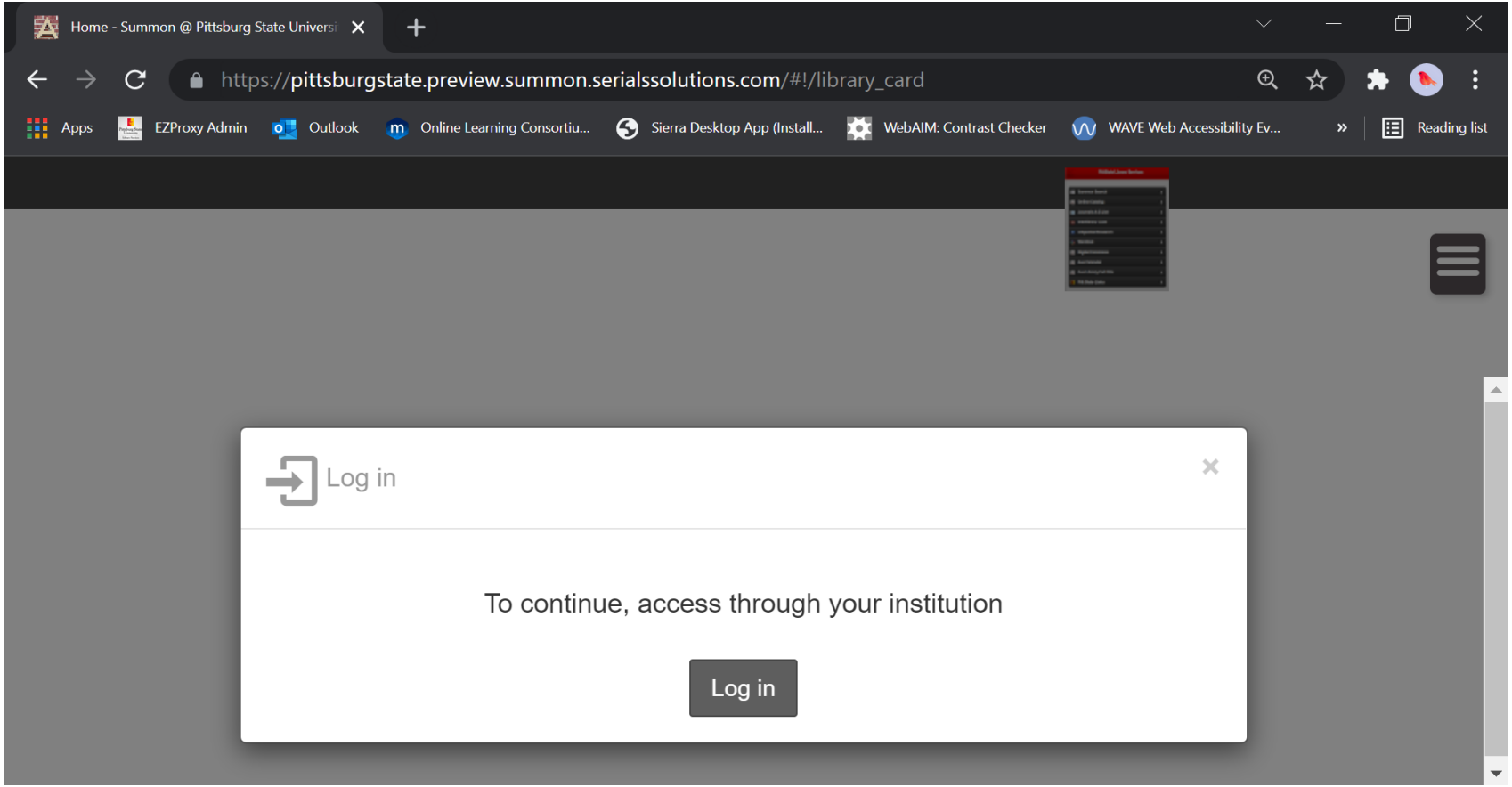
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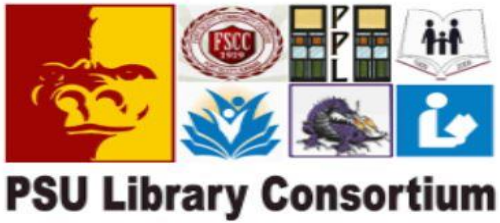
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Pitt State Login

Username: Students use PSU ID, Faculty/Staff use AD User

Password

Library Account Login

Name

Enter your barcode or login name

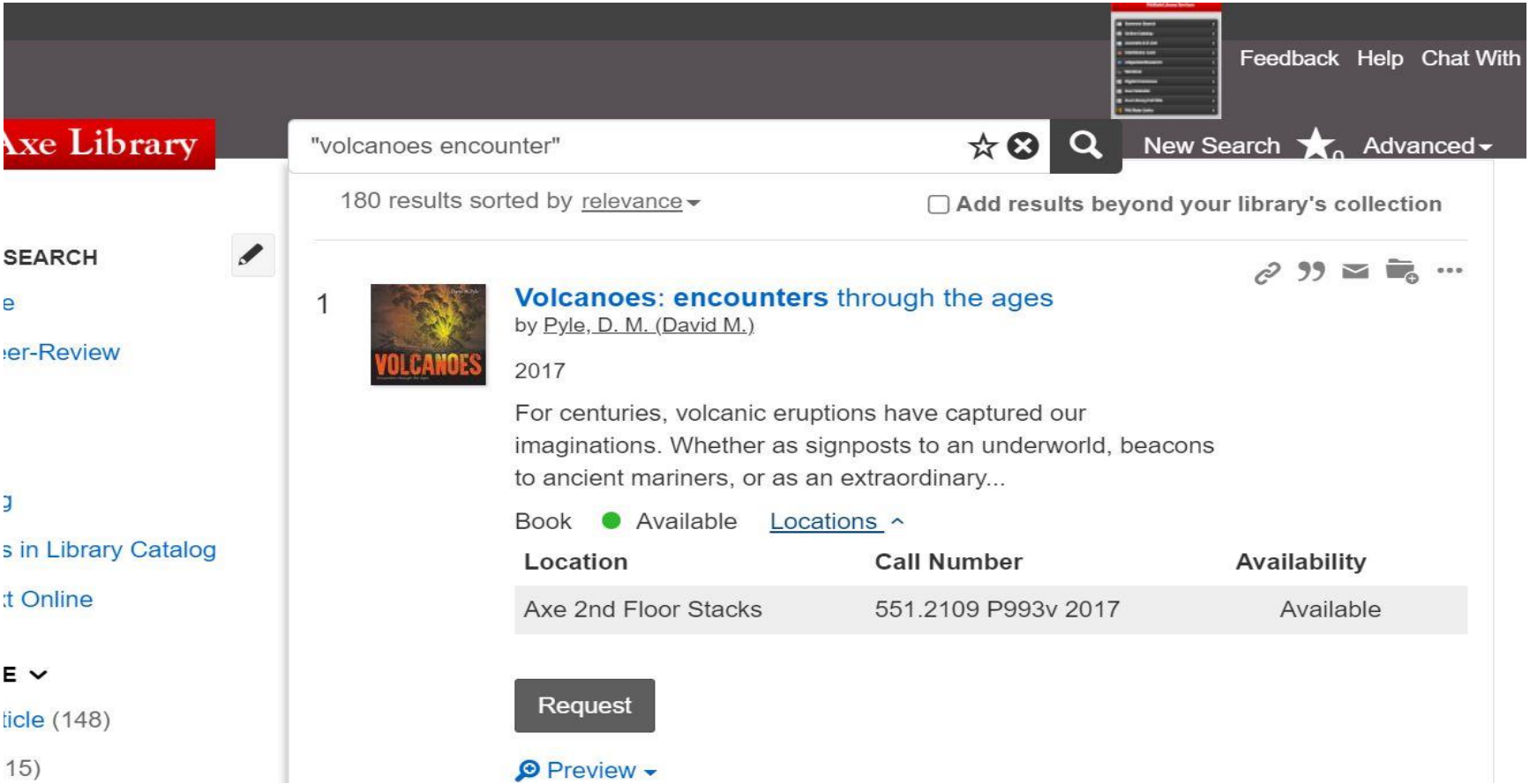
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Apps | EZProxy Admin | Outlook | Online Learning Consortiu... | Sierra Desktop App (Install... | WebAIM: Contrast Checker | WAVE Web Accessibilit

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"northern cheyenne ledge art"

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Northern Cheyenne ledger art by Fort Robinson breakout survivors

by Low, Denise; Powers, Ramon, 1939

Kansas Notable Book, 2020

"**Northern Cheyenne Ledger Art** by Fort Robinson Breakout Survivors presents the Dodge City ledger art booklets-created by Wild Hog, Porcupine, and possibly Tangled Hair, Left Hand, Noisy Walker (or Old...

Book ● Available Locations

Location	Call Number	Availability
Axe 2nd Floor Stacks	741.08997 L95n 2020	Available
Parsons Non-Fiction	741.08 L912	Available
Axe Kansas Collection	741.08997 L95n 2020	Lib Use Only

Request

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Axe Library

Library Card - Requests

sjohnssmith@pittstate.edu

Axe Library

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Select all 4	Title	Pickup location	Requested on	
☐	Northern Cheyenne ledger art by Fort Robinson breakout survivors by Low, Denise; Powers, Ramon, 1939 Kansas Notable Book, 2020	Axe Library	Oct 26, 2021	⊘ Cancel
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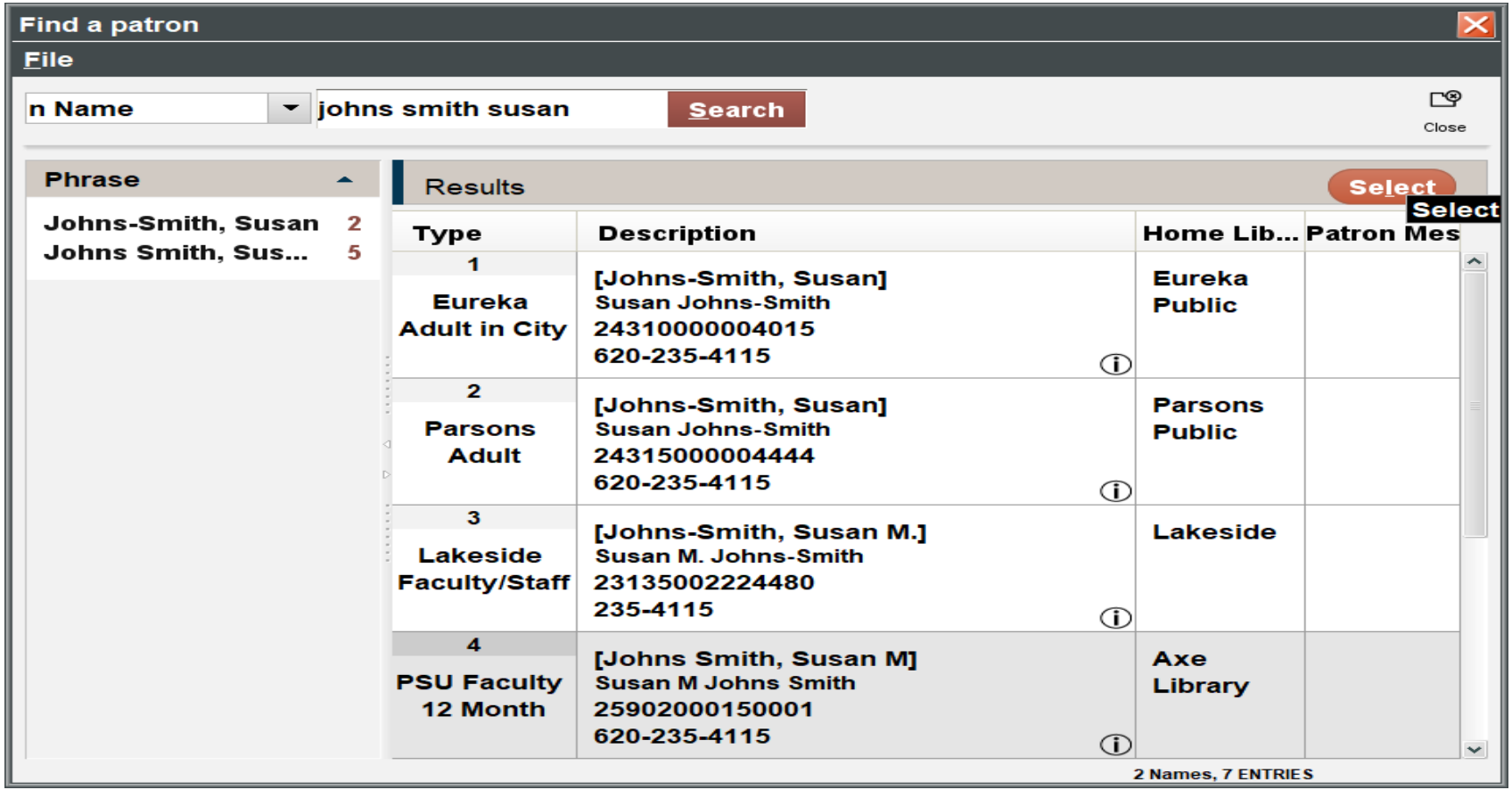
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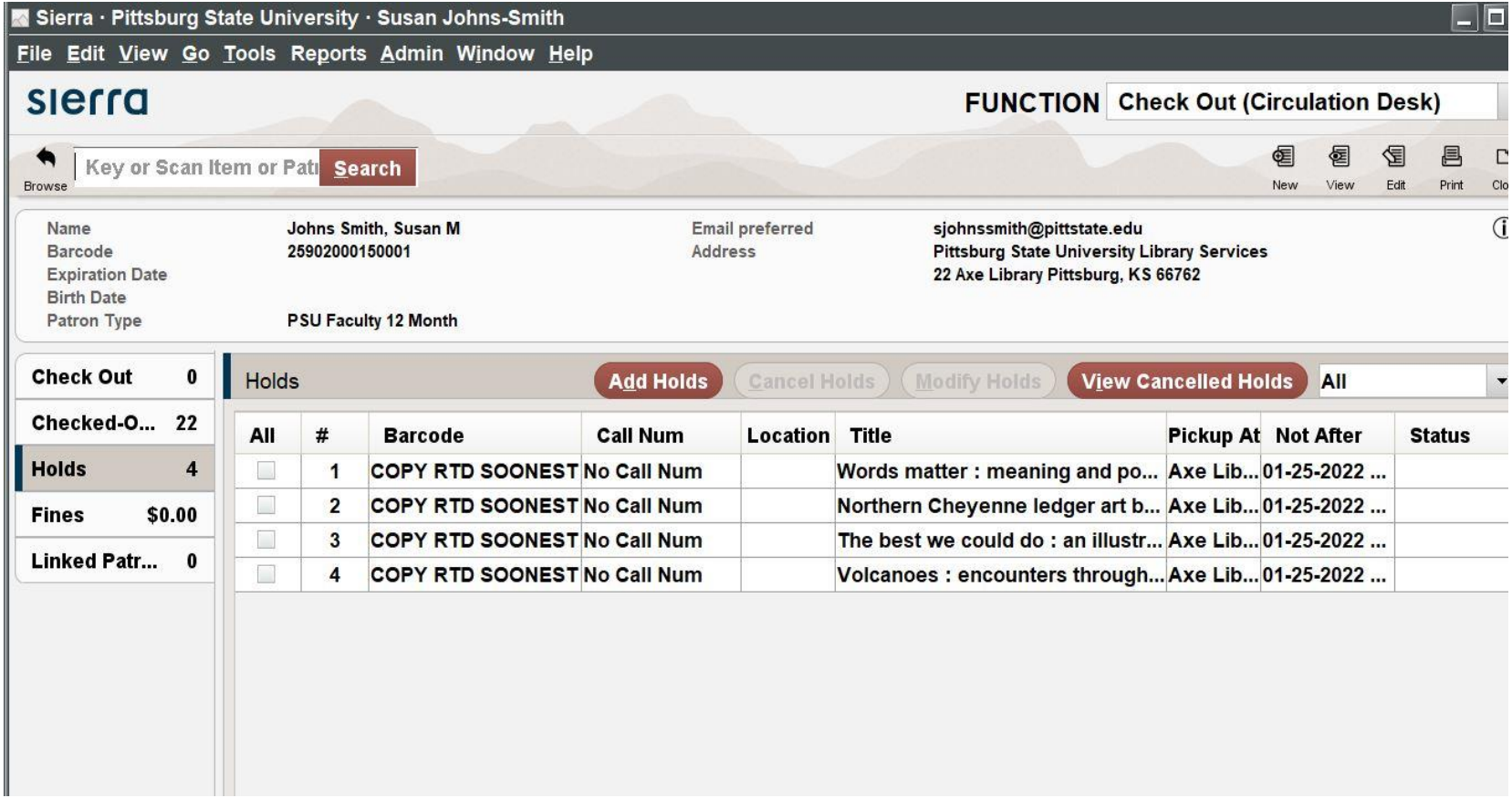
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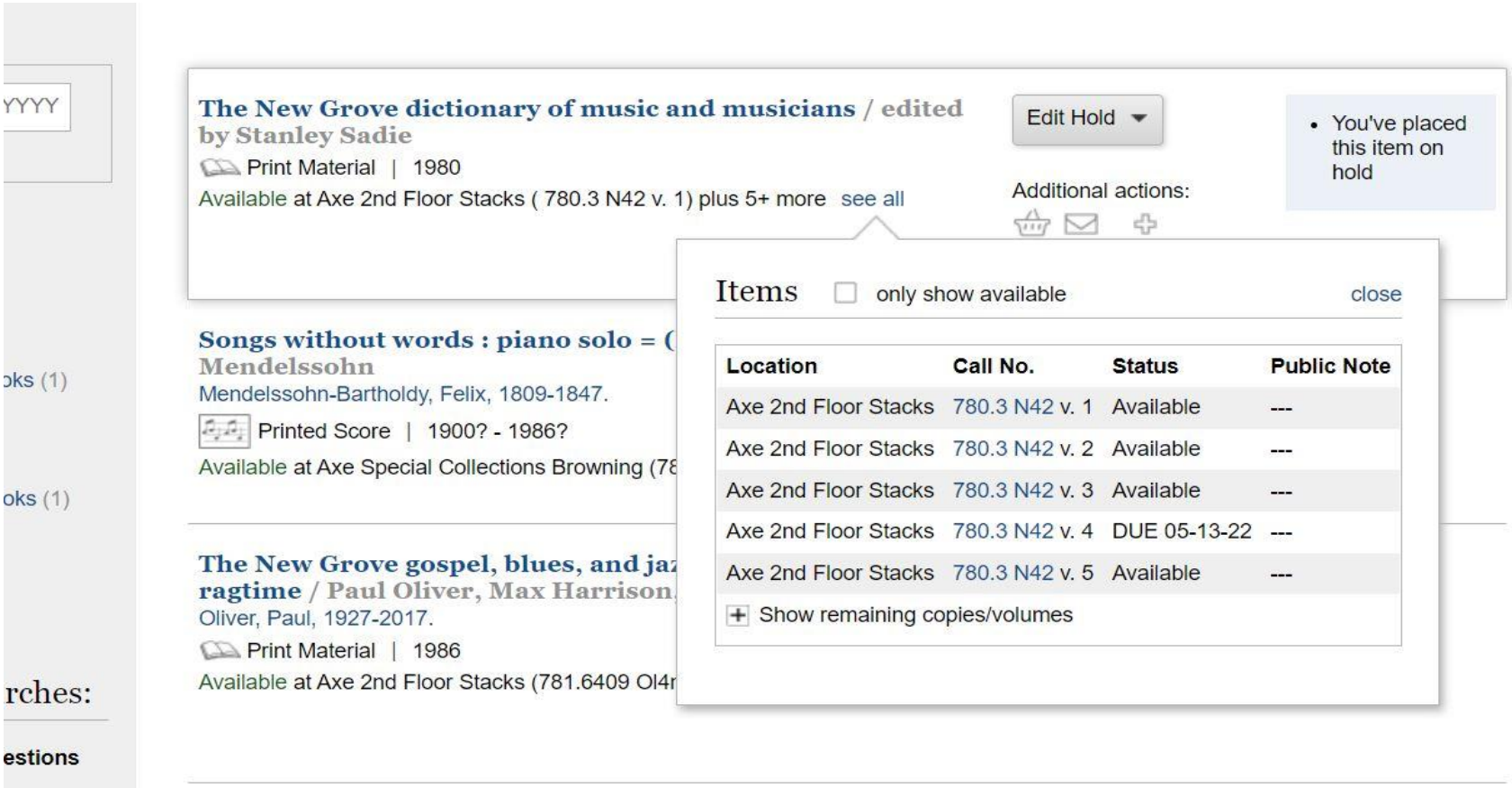
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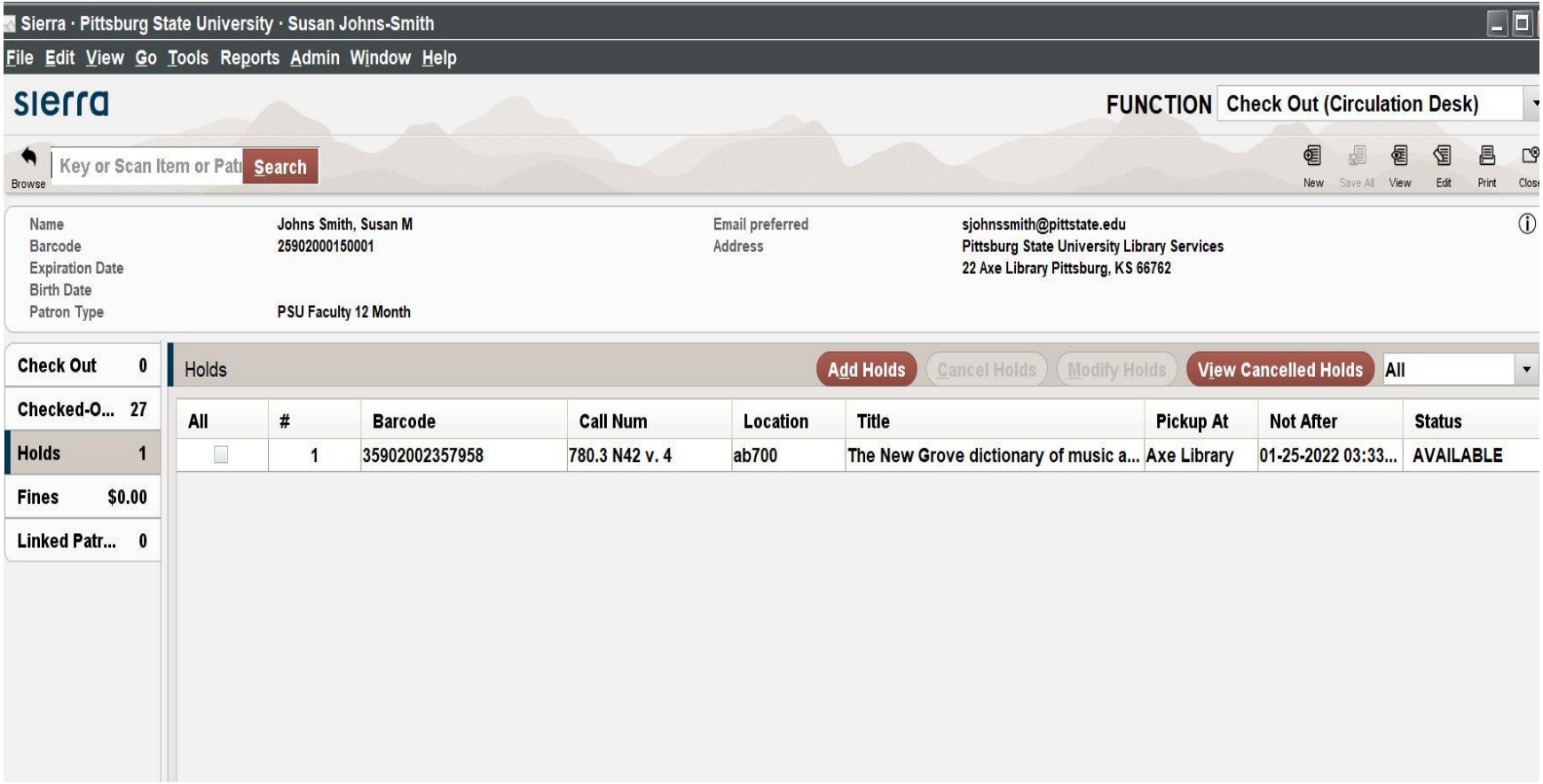
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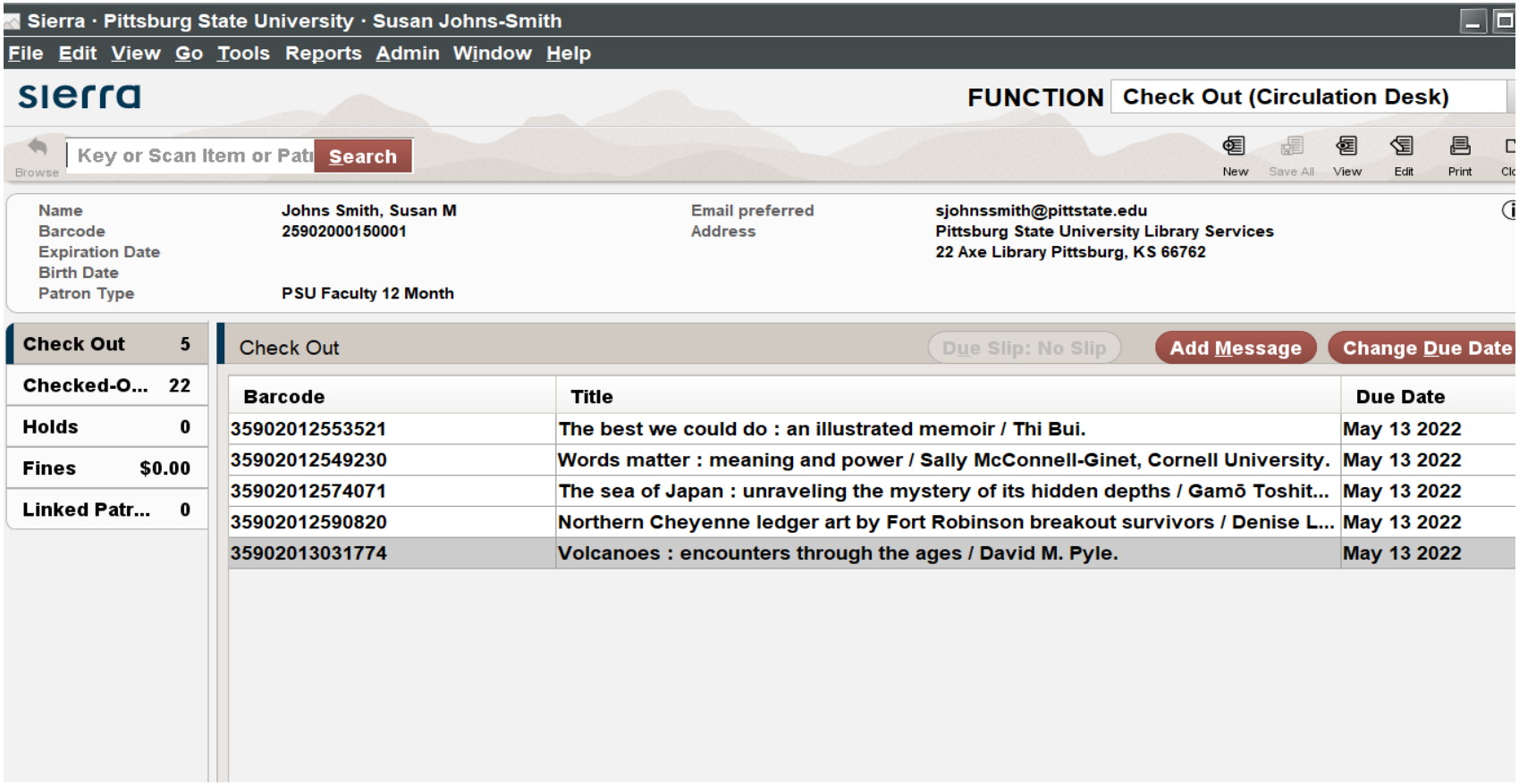
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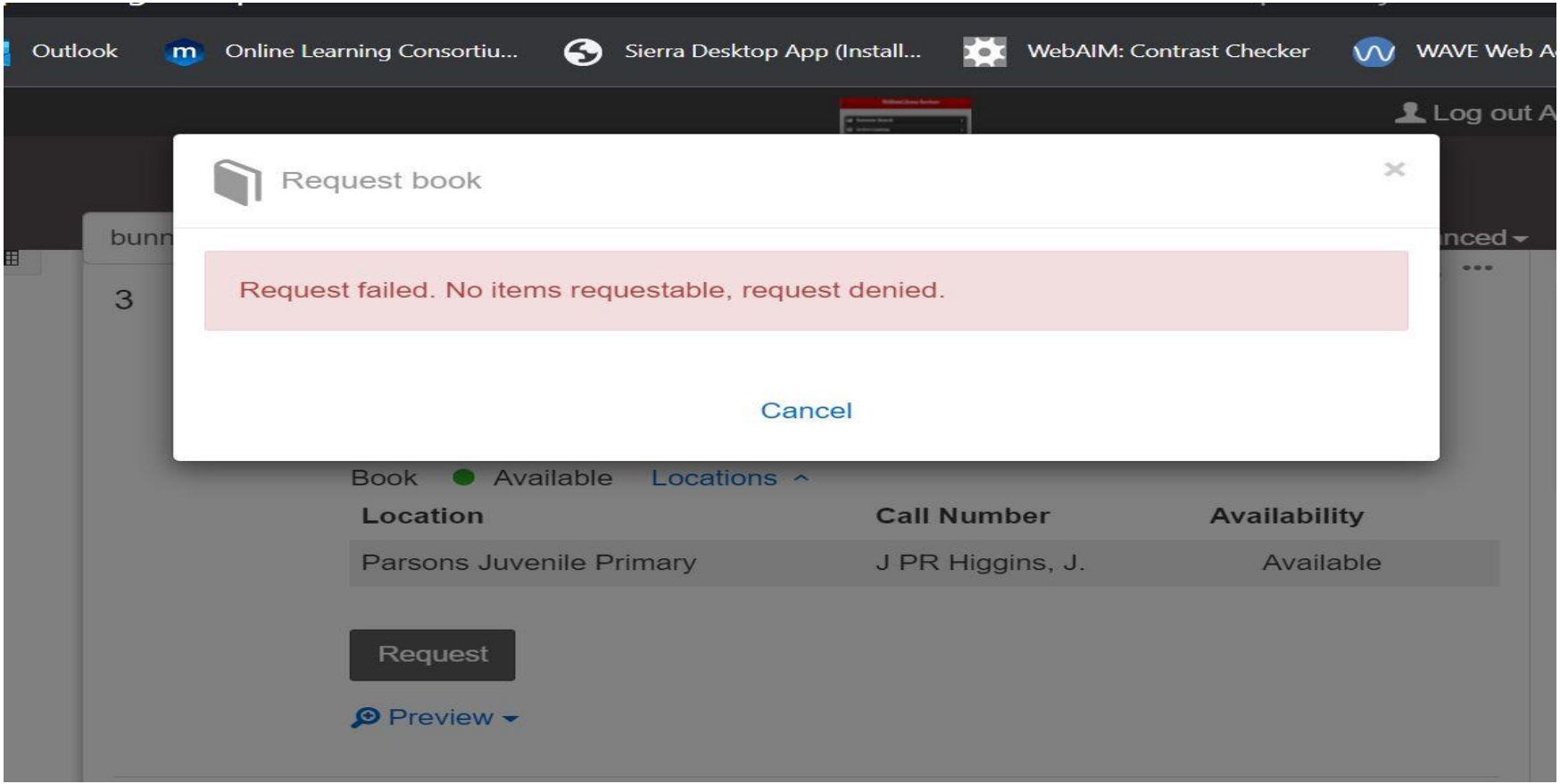
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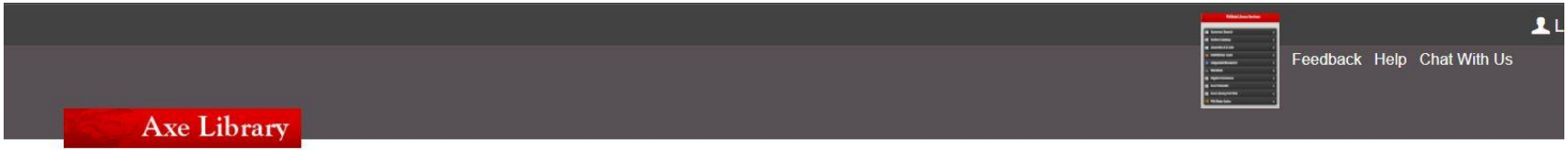
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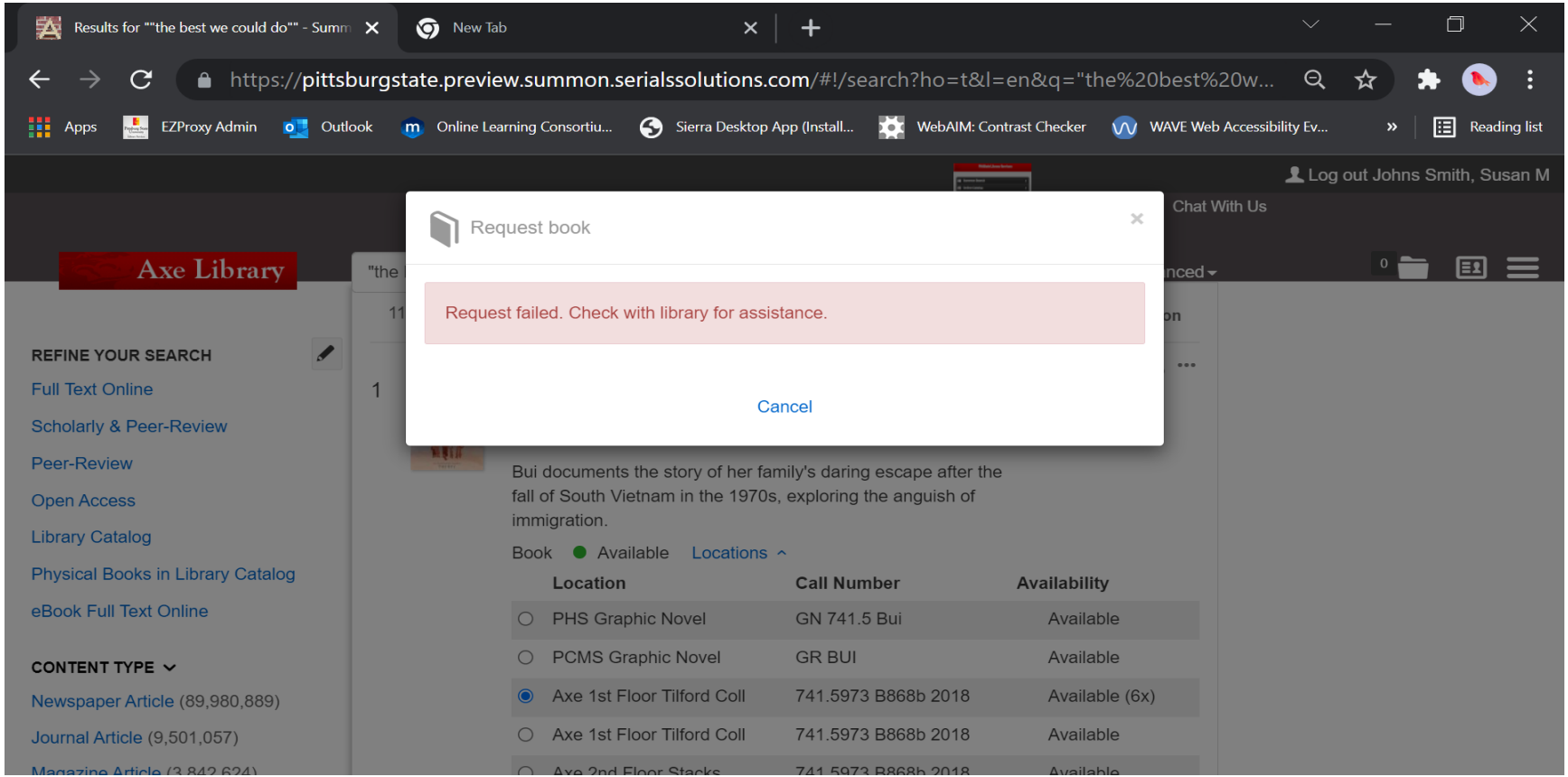
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How and When to Preview Your Site

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Institution profile required for Sierra via Summon



- You need to be on Sierra 5.1 and higher, using the Sierra REST API version 6.0 or higher
- CAS must be installed
  - SAML will be supported at a later date

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Steps to Activating the Sierra via Summon Integration

- Step 1: Confirm that your system has CAS installed
  - If not, contact Innovative support
- Step 2: Generate your secret key
  - Include Roles to Activate when generating your key
- Step 3: Provide your Secret Key, API Key and API URL to Ex Libris Support
  - Support will configure your site for SvS in the Preview environment so you can view your integration in Preview prior to pushing the change out to production

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Determining if CAS Is Installed

You'll need to be sure you have CAS Installed for your instance of Sierra.

- To confirm, visit this URL in any browser: https://<SierraAppFQDN>/iii/cas/login
- Replace <SierraAppFQDN> with the fully qualified domain name you are using for the Sierra App server
- If you have CAS installed, you should see a login page
- If CAS isn't running, you will get a 404 Not Found error in the browser

- If CAS is not running, please open an Innovative Support ticket requesting the CAS setup

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Roles to Activate when Creating a Secret Key

1. Bibs Read
2. Branches Read
3. Fines Read
4. Holdings Read
5. Holds Read
6. Items Read
7. Orders Read
8. Patrons Holds CRUD
9. Patrons Read
10. Patrons Validate
11. Patrons Write

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Integration Overview and Instructions

- An overview and specifics on getting your instance of SvS set up can be found on the Ex Libris Knowledge Center under:
  - Summon Product Documentation >>
    Configuring The Summon Service >>
    Summon: Sierra via Summon Integration
- https://knowledge.exlibrisgroup.com/Summon/Product_Documentation/Configuring_The_Summon_Service/020Configurations_within_the_Summon_Administration_Console/Summon%3A_Sierra_via_Summon_Integration

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Timeline

- You can confirm your CAS configuration (or work with support to get it installed) now
- Once you have that completed, you can open a ticket with Ex Libris support and provide your Secret Key, API Key and API URL
- We will begin configuring sites in the Preview Environment on November 29.

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Continued SvS Development

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Sierra via Summon Development Will Continue



OPEN SYSTEM

- Expand to include SAML
  - Not currently supported
  - If you're interested in being an Early Adopter, please let me know
- Improvements Identified in Phase 1

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Thank you!

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