

Summon: Sierra via Summon Integration

Sierra via Summon: Overview

This document provides an overview of Sierra via Summon, including an overview of system requirements and getting started instructions.

Sierra via Summon refers to the integration between the Sierra library system and Summon, allowing for a tighter integration of availability, placing requests and holds, and other patron functionality. If your institution meets the requirements for Sierra via Summon, then your patrons will be able to place a request or hold on an item directly from the Summon search results. Availability will be displayed using the Sierra API so the most up to date information will be presented. Patrons will also be able to see a subset of their patron information in a My Library Card page. They will also be able to view messages, cancel holds, and complete other actions.

Requirements for Sierra via Summon

If you are a Summon customer, and your institution uses Sierra, you will need to confirm that your instance of Sierra meets the following requirements:

- You need to be using Sierra 5.1 and higher.
- CAS must be installed. If this is not installed, you need to submit a request to Innovative support.
- Once you've got Sierra configured properly, you will need to create an API key and secret for the API and provide the following information to Summon Support:
 - API URL
 - API Key
 - API Secret
- When creating your API key, please be sure to include the following roles:
 - Bibs Read
 - Branches Read
 - Fines Read
 - Holdings Read
 - Holds Read
 - Items Read
 - Orders Read

- Patrons Holds CRUD
 - Patrons Read
 - Patrons Validate
 - Patrons Write
- When you create the API Key, you will be asked to fill out a form and include the following information:
 - **Name:** This is a name of your choosing. The description should help you identify what the key is used for. Most use their institution name.
 - **Email address:** this is the address the API Key will be delivered to. This should be someone at your institution.

Once the email is received, you need to complete the registration by creating a secret key, which can be any string of characters that you want, but it must contain at least 8 characters.

- **Expiration Date:** You can set this for whenever you want, but there is no need to set this. Set no expiration date if your institution plans to use this integration for some time.

If you have any questions, refer to the Sierra document [Administering Sierra API Client Keys](#).

Once you have this information, and once Sierra via Summon is generally available (currently planned for November 29), you will need to contact Ex Libris Support to request configuration in your instance in the preview environment. This will give you the chance to see the functionality prior to moving to production.

Note

When you submit your request for activation in preview, timing of activation will depend on the current queue of activation requests.
