Library Integration – Primo VE

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| Script | Direction |
| You can integrate the campusM app with your library, allowing patrons to search the repository and make use of library services.  If your library services are deployed via Primo VE, this session will show you how to set up your library’s integration with campusM.  First, we’ll take a quick tour of the Library integration, then we’ll show how to configure the authentication, product integration instance, and live tile for the integration. | General screenshots of the Primo VE PI homepage |
| We are currently logged in as a student in our campusM app on web, which automatically logs us into the library as well.  The Library tile shows us live personal information at a glance, such as how many items we need to pick up from the library, overdue items, items due soon, and our number of current loans.  Clicking on the tile takes us to Primo VE. Depending on your configuration, the landing page is either your Library Card, or the Primo VE search page.  Patrons can search the repository, view the retrieved records, and access the full text online.  Patrons can make use of any actions Primo VE allows, such as exporting to Excel, or generating a citation.  Search results can be filtered via the facets bar on the left; for example, to see items held by the library. For these items, patrons can place any of the available library requests.  From the top menu, patrons can access their library card. Here they can see their loans, requests, and fines & fees.  They can navigate to a specific tab, such as Loans, for more details, and to request renewal.  Patrons can also view their records saved as favorites, and their recent searches.  This concludes our quick tour of the Library integration. Next, let’s see how to configure it. | Click on tile  Click on Search  Search for Geology |
| All configurations for the Library integration via Primo VE are done within the App Manager.  The first step is to configure the user’s authentication in the library. As we mentioned, users are automatically logged in to Alma via Primo VE in a single-sign-on, or SSO. For this, we need to verify that the user’s AlmaID attribute is being returned by the Identity provider, or IDP.  To configure the assignment of the AlmaID from the IDP, go to App Settings > Integration Profiles, and select the relevant Authentication profile. In the integration profile editor, under Additional Mappings, make sure you populate the AlmaId with the relevant parameter in the IDP token.  Note that if the app sends an invalid AlmaID to Alma, the user will not be logged in and will need to log in manually.  Save your changes. | App Manager > App Settings > Integration profile > Additional Mappings |
| Next, let’s set up the Library integration for Primo VE.  In App Manager, go to Product Integrations, and click Add Product Integration Instance. For the Product Integration Type, select Library. And select your library system, Primo VE, in this demonstration. | App Manager > Product Integrations > Add PI Instance > Library > Primo VE  Description: Northern U Library |
| In this page, you can configure your Library integration via Primo VE.  Select Enable Product Integration; and provide a Description, which is the name of the Integration. |  |
| In the General section, you must fill in this information:  Under Base URL, fill in the base URL of your Primo VE instance. This is the same base URL you’ll see in your browser when you perform a search on your discovery system.  Under View ID, enter the the View ID of your Primo VE. The View ID normally includes the Institution Code as a prefix, followed by a colon, and then the View Code.  The Authorization Token is a secured handshake between campusM and Primo VE, that needs to be configured both here and in Alma. Make sure the token you enter here matches the one in Alma under Discovery > Customer Settings > app\_authorization\_token.  You may select a Landing Page, which is where the user is redirected when they click on the live tile. By default, it’s your Primo VE search page, but it can also be the user’s Library Card.  In the Live Tile section, you can select which personalized info you would like to see in the live tile. We recommend selecting up to four of the following items:  Charges – which displays the outstanding balance of the patron’s fines and fees.    On Hold Self – the number of items waiting for patron pick-up.  The number of Overdue Loans.  The number of Items Due Back Soon. How ‘soon’ is specified in the Days Before Due Date field.  The number of Current Loans.  And the number of patron Blocks and Messages sent by the library.  In the Prioritize Live Tile Items section, you can change the display order of the live tile items via the arrows.  For the icons of the live tile items, we will use campusM’s default icons. Alternatively, you can select to upload custom icons of your own.  When done configuring your Primo VE integration, click Save.  The new Library – Primo VE integration has been created. | Base URL: <https://alma-eu02-.campusm.exlibrisgroup.com>  View ID: NORTH\_INST:DEMO  Token: q58151J4bD |
| The final step in the deployment is to add a menu option, or tile, to the home screen, which is connected to the Primo VE integration we just created.  In App Manager, go to App Builder, and add a menu option. From the available menu option types, select Product Integrations Tile. For the product integration instance, select your newly created Primo VE integration. Give the menu option a name, and click Create. | App Manager > App Builder  Description: Primo VE |
| Our menu option has been added. You can now configure this tile, as you would with any other tile; for example, to change its size. Our tile’s appearance has been changed.  Our live tile appears blank in the preview, but the user will see it populated with their personalized data!  When done configuring your tile, click Save & Publish. The tile is now published to the end-users of the app.  Thanks for joining! |  |
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