Library Integration – Primo

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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, this session will show you how to set up your library’s integration with campusM, whether your ILS is Alma, Voyager, or Aleph.  First we’ll take a quick tour of the Library integration, then we’ll show you how to configure the authentication, product integration instance, and live tile for the integration. | General screenshots of the Primo 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 any outstanding charges, how many items we need to pick up from the library, overdue items, and items due soon.  Clicking on the tile takes us to the Primo search page. All the options available here are fully configurable, as we’ll show later.  In the search bar, patrons can select a Primo tab and scope to search. They can enter a search term, browse through the retrieved records, add records to favorites, and access the full text online edition. Clicking on a record shows more details and links through to Primo where you can place requests on the record.  In the Library Card tab, patrons can see their loans, requests, and fines & fees.  In the Useful Links tab, patrons can navigate to useful links, as curated by your team.  In the Open Hours tab, patrons can view the Open Hours of the various libraries. This too is configured by your team, as we will presently show.  So much for our quick tour of the Library integration; now on to the configurations! | Click on tile  Search for Geology |
| All configurations for the Library integration via Primo 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 Primo in a single-sign-on, or SSO. For this, we need to verify that this user’s ILS ID attribute is being returned by the Identity provider, or IDP. The ILS ID is a unique identifier for each staff or student user in your ILS, as configured by your institution.  To configure the assignment of the ILS ID from the IDP, go to App Settings > Integration Profiles and select the relevant Authentication profile, in our case CMAuth. Under Additional Mappings, make sure you populate the ILS ID with the relevant parameter in the IDP token.  In our case, we are using the Alma ILS, so our ILS ID is the AlmaID. 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.  Go to Product Integrations, and click Add Product Integration Instance. For the Product Integration Type, select Library. And select your library system, Primo, in this demonstration. | App Manager > Product Integrations > Add PI Instance > Library > Primo VE |
| In this page, you can configure your Library integration via Primo.  Select Enable Product Integration; and provide a Description, which is the name of the Integration. | Description: Southern U Library |
| In the Vendor section, select Primo for the Discovery System. Then fill in the mandatory fields for Primo.  Under URL to retrieve the information, fill in the URL to the Primo API Gateway of your region. You can find this information in our Developer Network, under Primo REST APIs. There, you can also find information on creating an API Key, which you need to enter here.  Under View ID, enter the View ID of your Primo.  Under Tab, you may enter any search tabs configured in your Primo, that you would like to make available to your users. Each tab allows users to search different scopes, for example the entire institution, or just the Law Library.  Select your institution’s ILS, from Alma, Voyager, and Aleph. In our demonstration, it’s Alma. Then fill in the fields for Alma.  Under Base URL to retrieve the information, enter your region’s URL to the Alma Gateway. This information can be found in the Alma REST APIs page of our Developer Network, along with API Key information.  For User Input Identifier, select from where to retrieve the user’s ILS ID. In our case, it’s from the Token Property, AlmaId, as shown earlier.  You may test the API connection here. | Primo URL: <https://api-eu.hosted.exlibrisgroup.com/primo/v1/>  Primo REST APIs  View ID: TCCDALAMA  API Key: l7xx4az7956c63445611656e0fcdc35fe23b  Alma URL: <https://api-eu.hosted.exlibrisgroup.com>  API Key:  l5xx5ty7956c63445633656e0fcdc35fe24c |
| The General section includes General Parameters and configurations of the different pages in your Primo integration. You can learn about all the configurations in our documentation. Meanwhile, let’s look at some of these configurations.  In the Display Static Content settings, you can fill in text and images to be displayed in the homepage.  In the Main Menu Bar settings, you can configure the look and feel of the bottom navigation menu.  In the Useful Links settings, you can provide a list of links that will be displayed in a dedicated tab.  In the Open Hours settings, you can enter the open hours of the library, to be displayed in a dedicated tab.  In the Library Card settings, you can select which personalized info the user can view in the Library Card tab, such as their Loans, and Requests. Then, for each section, you can make specific configurations. | Base URL: <https://alma-eu02-.campusm.exlibrisgroup.com> <https://ap01.primo.exlibrisgroup.com> |
| Next is the Live Tile section. Here you can select which personalized info you would like to see in the live tile, including:  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.  And the number of Items Due Back Soon. How ‘soon’ is specified in the Days Before Due Date Field.  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 integration, click Save.  The new Library – Primo integration has been created. |  |
| The final step in the deployment is to add a menu option, or tile, to the home screen, which is connected to the Primo integration we just created.  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 integration. Give the menu option a name and click Create. | App Manager > App Builder  Description: Primo |
| 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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