Ex Libris Alma and Primo (Library)

Product Information

<table>
<thead>
<tr>
<th>Category</th>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-category</td>
<td>ILS, LSP, Discovery</td>
</tr>
</tbody>
</table>
| Website       | [http://www.exlibrisgroup.com/category/AlmaOverview](http://www.exlibrisgroup.com/category/AlmaOverview)  
 [http://www.exlibrisgroup.com/category/PrimoOverview](http://www.exlibrisgroup.com/category/PrimoOverview) |
| Product version | N/A (Hosted, SaaS) |
| API Documentation | [https://developers.exlibrisgroup.com/](https://developers.exlibrisgroup.com/) |

About Ex Libris Alma

Alma is the solution your library needs as the focal point of learning and research at your institution. Designed to handle all resource types, Alma supports library collaboration and helps you optimize your user experience and collection with rich analytics.

Alma is designed to ensure that your entire collection can be managed through a single interface and that you can continue to serve students, instructors, and researchers with a collection optimized for their needs. With Alma you can manage all the resource types your collections include within a single interface, including electronic, print, and digital. In addition, Alma fully supports the collaboration crucial for your institution in the modern academic environment with built-in support for different levels of consortium arrangements. Alma’s active user community, open standards, and rich collaboration capabilities allow your library to benefit from the experiences and innovations of other libraries worldwide.

([http://www.exlibrisgroup.com/category/AlmaOverview](http://www.exlibrisgroup.com/category/AlmaOverview))

About Ex Libris Primo and PrimoVE

In the age of overwhelming quantities of information and ubiquitous search engines, library patrons have come to expect a quick, user-friendly and personalized discovery experience. Libraries, for their part, need to cater to different users, while clearly demonstrating the impact of their services.

Ex Libris Primo empowers libraries to shape the discovery experience, providing students, faculty and staff an intuitive, end-to-end service, and maximizing the value of library collections.

([http://www.exlibrisgroup.com/category/PrimoOverview](http://www.exlibrisgroup.com/category/PrimoOverview))
Integration Overview

The campusM integration with Ex Libris Alma and Primo provide users the following functionality:

- Search for library resources and view a record's metadata details
- View and manage account information; including loans, requests, fines and favorites/eShelf (favorites/eShelf is available in Primo only)
- Optional basic title-level requesting for physical material for pickup in item owning library
- Optional library open hours
- Link out to university-defined webpages

Integration Method

- API

Prerequisites

There are several prerequisites to the campusM integration with Primo and Alma:

<table>
<thead>
<tr>
<th>Prerequisite</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide your Alma domain (e.g. <a href="https://api-xx.hosted.exlibrisgroup.com">https://api-xx.hosted.exlibrisgroup.com</a>)</td>
<td><a href="https://knowledge.exlibrisgroup.com/..._an_API_Key%3F">https://knowledge.exlibrisgroup.com/..._an_API_Key%3F</a></td>
</tr>
<tr>
<td>Provide an Alma API key for the following functional end-points:</td>
<td></td>
</tr>
<tr>
<td>- Users (Read and Write)</td>
<td></td>
</tr>
<tr>
<td>◦ Get and Post Request Info</td>
<td></td>
</tr>
<tr>
<td>◦ Get User Details with Summarized Loan/Request/Fine-Fee Info</td>
<td></td>
</tr>
<tr>
<td>◦ Get and Post Loan and Renewal Info</td>
<td></td>
</tr>
<tr>
<td>◦ Get Fine/Fee Info</td>
<td></td>
</tr>
<tr>
<td>- Bib (Read)</td>
<td></td>
</tr>
<tr>
<td>◦ Get Bib ID for use in Requesting</td>
<td></td>
</tr>
<tr>
<td>- Configuration (Read)</td>
<td></td>
</tr>
<tr>
<td>◦ Get Library Names</td>
<td></td>
</tr>
<tr>
<td>◦ Optional: Get Library Open Hours (If not provided via Alma API, the format provided must follow the xsd as returned by the Alma Retrieve Open Hours API)</td>
<td></td>
</tr>
<tr>
<td>Provide your Alma institution code (e.g. 01XXXX)</td>
<td></td>
</tr>
</tbody>
</table>

It is recommended that the Alma API key and the Primo API key be different keys.
<table>
<thead>
<tr>
<th>Prerequisite</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide a Primo / PrimoVE API key for the following functional end-points:</td>
<td>It is recommended that the Primo API key and Alma API key be different keys.</td>
</tr>
<tr>
<td>• Primo Brief Search (Read)</td>
<td></td>
</tr>
<tr>
<td>• Primo PNX Search (Read)</td>
<td></td>
</tr>
<tr>
<td><strong>Primo-ONLY</strong></td>
<td></td>
</tr>
<tr>
<td>• eShelf/Favorites (Read/Write)</td>
<td></td>
</tr>
<tr>
<td>• Primo Translations (Read)</td>
<td></td>
</tr>
<tr>
<td>• Primo Configurations (Read)</td>
<td></td>
</tr>
<tr>
<td>Provide Primo search parameters including:</td>
<td></td>
</tr>
<tr>
<td>• Primo domain URL including port (e.g. <a href="https://university.primo.hosted.exlibrisgroup.com">https://university.primo.hosted.exlibrisgroup.com</a>)</td>
<td><a href="https://developers.exlibrisgroup.com/primo/apis/webservices/rest">https://developers.exlibrisgroup.com/primo/apis/webservices/rest</a></td>
</tr>
<tr>
<td>• Primo API domain (e.g. <a href="https://api-xx.hosted.exlibrisgroup.com">https://api-xx.hosted.exlibrisgroup.com</a>)</td>
<td></td>
</tr>
<tr>
<td>• Primo institution code (e.g. 01XXX) - note, this may be different than the Alma institution code</td>
<td></td>
</tr>
<tr>
<td>• View ID Code (e.g. VID=IMAGES)</td>
<td></td>
</tr>
<tr>
<td>• Search scope</td>
<td></td>
</tr>
<tr>
<td>• Tab/Search Profile Slots</td>
<td></td>
</tr>
<tr>
<td>Authentication</td>
<td>The integration presumes the username/userid of the logged in campusM users are typically the same as the username/userid managed in Alma.</td>
</tr>
<tr>
<td><strong>IMPORTANT! - If the username/userid of the campusM users will not exist in Alma, contact your Ex Libris support/service representative to discuss relevant solutions to allow mapping of usernames/userids.</strong></td>
<td></td>
</tr>
<tr>
<td>Provide a minimum of three (3) Test users and credentials containing comprehensive and typical data, including the following:</td>
<td>The test accounts should allow testing the integration according to the Suggested Testing Guidelines, i.e. should support authentication / log into the app as the test account been provided and run complete end-to-end testing of the integration functionality.</td>
</tr>
<tr>
<td>• Loans (both renewable and non renewable) - 5 loans with different expiration dates</td>
<td></td>
</tr>
<tr>
<td>• Overdue loans - 2 overdue loans</td>
<td></td>
</tr>
<tr>
<td>• Requests - 6 requests with different dates - some on hold shelf and some not yet processed</td>
<td></td>
</tr>
<tr>
<td>• Fines and fees - 2 fines</td>
<td></td>
</tr>
<tr>
<td>• Favorites/eShelf - 3 favorites</td>
<td></td>
</tr>
</tbody>
</table>

Note that campusM integrates with the Alma-Primo environments set against the API key. As many Sandbox environments are not aligned with Production, and since the users testing will typically be test users and limited and targeted tests, it is recommended to provide the API keys to work against Alma and Primo production even for initial campusM Sandbox app testing. However, if the users or extent of testing you will do during the campusM Sandbox testing will be expansive and your Sandbox environment represents a full replica of production, then it would be advisable to avoid any impact on your production Alma and Primo systems to first set Alma and Primo API keys that first interact with the Alma and Primo sandboxes during testing on the campusM Sandbox, followed by API keys that interact with Alma and Primo production when deploying to campusM production.
User Experience

The Alma-Primo library integration offers two types of tiles (live or static) available for the institution to choose from based on their preference and overall branding and UX guidelines. The live tile options and default include:

- # of loans
- # of overdue loans
- Total amount of fines/fees (two decimal places + currency)
- To pick up (# of ready on hold shelf processed requests)
- Sliding list of any already overdue or upcoming overdue loans (default, but configurable threshold: due within 7 days or overdue)

<table>
<thead>
<tr>
<th>Property</th>
<th>Live Tile</th>
<th>Static Tile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Size</td>
<td>2x1</td>
<td>1x1</td>
</tr>
<tr>
<td>Minimum Size</td>
<td>2x1</td>
<td>1x1</td>
</tr>
</tbody>
</table>

**Suggested Design**

![Suggested Design](image)

Screenshots
The seven-per-cent solution: being a reprint from the reminiscences of John H. Watson, M.D.

Type: Book
Contributors: Nicholas Meyer
Published: New York: Dutton
Date Published: 1974


Format: 250 p. : ill. ; 22 cm.
My Screen

FINES

Return: £0.00
Date Due: Monday 26th Sep 2016 @ 12:00pm
Status: Active
Type: Card renewal

My Screen

LOAN S

The awesome 'doobie badlands' / by Muriel Marshall.

Author: Marshall, Muriel
Date Due: Sunday, 9th Jul 2016

Man (by) Richard J. Harrison (and) William Montagna.

Author: Harrison, Richard John
Date Due: Sunday, 9th Jul 2016

More Information

Author: Marshall, Muriel

Date Due: Sunday 8th Jul 2018

Date Landed: Thursday 7th Jun 2018

Call Number: F690 .M37 2000

Circulation Desk: Resource Sharing Desk

Library: Science Library

Location: Science Stacks

Status: Active

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Natural history / With an English translation by H. Rackham.

Author: Rackham, H.

Date Requested: Tuesday 12th Jun 2018

More Information

Econometric history / prepared for the Economic History Society by Donald N. McCloskey.

Author: McCloskey, Donald N.

Date Requested: Tuesday 12th Jun 2018

More Information

The seven-per-cent solution: being a reprint from the reminiscences of John H. Watson, M.D., as edited by Nicholas Meyer.

Author: Meyer, Nicholas

Date Requested: Tuesday 12th Jun 2018

More Information

An historical and descriptive account of the suspension bridge...
Natural history / With an English translation by H. Rackham.
### The classic illustrated Sherlock Holmes: 37 short stories plus a complete novel

**Author:** Arthur Conan Doyle Sir, 1859-1930  
**Published:** c.1907  
**Custodian:** Sidney Paget 1861-1908

### A short history of the West Indies

**Author:** J. H. Parry (John Horace), 1914-  
**Published:** 1956  
**Custodian:** Phillip Manderson Sherlock Sir
<table>
<thead>
<tr>
<th>Contribution(s)</th>
<th>Arthur Conan Doyle &amp; J. F. Archibald, George Gaverie</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creator(s)</td>
<td>Murray, Shail</td>
</tr>
<tr>
<td>Description</td>
<td>Sherlock Holmes, Blue confident. Presents two adventures of Sherlock Holmes and Dr. Watson, each accompanied by a section identifying the clues mentioned in the story, and explaining the reasoning used by Holmes to put the clues together and come with a solution. Also includes a map highlighting the sites of the mysteries.</td>
</tr>
<tr>
<td>Publisher(s)</td>
<td>Minneapolis - Corviglia Books</td>
</tr>
<tr>
<td>Date Published</td>
<td>1980</td>
</tr>
<tr>
<td>ISBN(s)</td>
<td>08756113877</td>
</tr>
<tr>
<td>Format</td>
<td>47 p. Ill., 20 cm.</td>
</tr>
</tbody>
</table>
Facets (Search)
### Sample Requests

#### Sample Primo / PrimoVE Brief Search Request

```plaintext
https://api-{REGION}.hosted.exlibrisgroup.com/primo_library/libweb/webservices/rest/v1/search?q=any,contains,{SEARCH_QUERY}&view=full&vid={VIEW_NAME}&inst={INSTITUTION_NAME}&scope={SCOPE_NAME}&apikey={API_KEY}
```

{REGION}=na, eu, or ap

Additional optional parameters:

- &lang={LANG_CODE}
- &tab={SEARCH_PROFILE} For PrimoVE

Institution will provide the highlighted parameters. Please see prerequisites form.

#### Sample Primo Favorites API Retrieval (Primo-Only)

```plaintext
https://api-{REGION}.hosted.exlibrisgroup.com/primo/v1/eshelf/{TEST_USERNAME}?apikey={API_KEY}
```

Institution will provide the highlighted parameters. Please see prerequisites form.

#### Sample Primo Configuration API Retrieval (Primo-Only)

```plaintext
https://api-{REGION}.hosted.exlibrisgroup.com/translations/vid={VID}?lang={LANG_CODE}&apikey={API_KEY}
```

Institution will provide the highlighted parameters. Please see prerequisites form.

#### Sample Alma User Account Retrieval

```plaintext
https://api-{REGION}.hosted.exlibrisgroup.com/almaws/v1/users/{TEST_USERNAME}?apikey={API_KEY}&format=json
```

Institution will provide the highlighted parameters. Please see prerequisites form.

#### Sample Alma User Loan Retrieval

```plaintext
https://api-{REGION}.hosted.exlibrisgroup.com/almaws/v1/users/{TEST_USERNAME}?apikey={API_KEY}&format=json
```

Institution will provide the highlighted parameters. Please see prerequisites form.
Sample Alma User Requests Retrieval

https://api-{REGION}.hosted.exlibrisgroup.com/almaws/v1/users/{TEST_USERNAME}?apikey={API_KEY}&format=json

Institution will provide the highlighted parameters. Please see prerequisites form.

Sample Alma User Fines/Fees Retrieval

https://api-{REGION}.hosted.exlibrisgroup.com/almaws/v1/users/{TEST_USERNAME}?apikey={API_KEY}&format=json

Institution will provide the highlighted parameters. Please see prerequisites form.

Sample Alma Bib Requests Retrieval

https://api-{REGION}.hosted.exlibrisgroup.com/almaws/v1/almaws/v1/bibs/{MMS_ID}/holdings/{HOLDING_ID}/items/{ITEM_ID}?apikey={API_KEY}&format=json

Institution will provide the highlighted parameters. Please see prerequisites form.

Sample Alma Open Hours Retrieval

https://api-{REGION}.hosted.exlibrisgroup.com/almaws/v1/conf/libraries/{LIBRARY_CODE}/open-hours?apikey={API_KEY}&format=json

Institution will provide the highlighted parameters. Please see prerequisites form.

Sample Alma Library Retrieval

https://api-{REGION}.hosted.exlibrisgroup.com/almaws/v1/conf/libraries?apikey={API_KEY}&format=json

Institution will provide the highlighted parameters. Please see prerequisites form.

Offline Functionality

Not supported.
**Configuration Options**

Pre-requisite and configuration options should be defined in the [Configuration worksheet](#) available linked from this article.

<table>
<thead>
<tr>
<th>Configuration Item</th>
<th>Options</th>
</tr>
</thead>
</table>
| **My Account**     | Institutions can choose which of the following to display:  
|                    | • Loans  
|                    | • Requests  
|                    |   ◦ Whether to include Resource sharing requests or not and whether to allow their cancellation- default is to show them and not to cancel them  
|                    | • Fines/Fees  
|                    | • Favorites (eShelf) - Primo ONLY |
| **Title Requests** | Institutions can determine whether basic title-level requesting is allowed (where the pickup library is equal to the owning library of the requested item). Whether this is turned on or not, end users will have the option to view the additional request options the library provides by linking out to the full view services page. |
| **Favorites**      | Favorites (eShelf) may be optionally included in scope (default is included, except PrimoVE) |
| **Open Hours**     | Institutions can optionally choose to show Library Opening Hours for today’s hours (of their main library) on the opening splash page of the integration and can link to all library opening hours additionally. |
| **Search Results Metadata Fields** | Institutions can choose which of the Primo (PNX) metadata fields will be presented on the search results page. By default the fields presented are:  
|                    | • Title  
|                    | • Material Type  
|                    | • Author  
|                    | • Publisher  
|                    | • Published |
| **Full Display Record Metadata Fields** | Institutions can choose which of the PNX metadata fields will be presented on the full record display page. By default the fields presented are:  
|                    | • Title  
|                    | • Material Type  
|                    | • Author(s)  
|                    | • Creator(s)  
|                    | • Date Published  
|                    | • Is Part Of |
| **Fields for other Full Record Display** | Other full record displays can add/remove allowed fields |
| **Labels**         | Labels may be optionally overridden or translated |
| **Link**           | • University can provide a list of links (e.g. ask us, library homepage, etc.)  
|                    | • Each link is a simple URL and text |
Suggested Testing Guidelines

The following acceptance criteria is recommend to be used as part of the testing and approval process:

- User can search and review results. The results should be similar to those provided on the Primo web user interface
- User can facet/filter their search results based on the provided facet areas
- User can click on a record to view additional metadata information
- User can click on the Account tab to view current number of loans, active requests, fines (and favorite records, if included)
- User can click on the loans and an individual loan to view additional information
- User can renew loans
- If favorites included, user can add search result records to the favorites and remove them
- User can optionally request and cancel a title-level hold request (when the pickup library is equal to and allowed in the item's owning library)
- User can link out to the Primo/Alma GetIt/ViewIt service page for other services such as availability, request (physical) or view online (electronic)
- If Opening hours included, user can view each library's opening hours for the coming week
- User can use the links to navigate to institution-defined webpages