



Welcome!

Office Hours will start at 2pm and run until 3pm

Please mute your microphone

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources



Spine Label Printing, Project Review, and Authentication considerations with Alma.

Ben Grimshaw
Project Manager
CARLI Open Office Hours: 1/30/2020



- **Getting Started with the Developers' Network**
- Spine-o-Matic
- Project Review
- Authentication in Alma
- Open Athens considerations
- Upcoming Topics

Log in: <https://developers.exlibrisgroup.com/>

developers.exlibrisgroup.com

BASECAMP Ben's Dashboard ... BIBFRAME - Bibliog... UltiPro Imported (1) AlmaSQLLogin AlmaPrintSlip AlmaPrintSlip Password Vault Sig... CARLI AlmaInstitutionList Index of \us-filer01... GitHub - Icnetedv...

New Here? API Console Standards Search Go to exlibrisgroup.com Login Signup

Ex Libris a ProQuest Company DEVELOPER NETWORK

Learn Documentation Build My APIs Share Blog Ask Forum Discover App Center

Extend. Ex Libris.

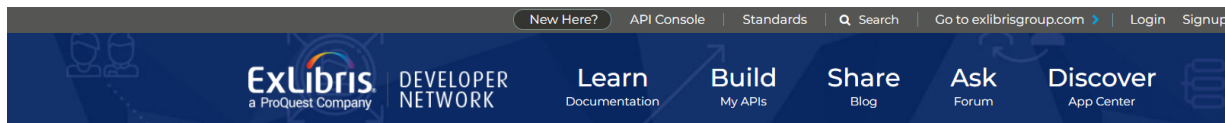
Build your solutions with APIs, system integrations, and standards support.

ALMA PRIMO SUMMON CAMPUSM LEGANTO ROSETTA SFX >

Institutional credentials were delivered with the Test Load but can be resent if needed.

Collaborate and build solutions with the developer community

The first step is to log in with your institutional credentials:



Login

Username or Email
01CARLL 3 letter code

Password
.....

Remember Me

[Register](#) | [Lost Password](#)



Click Build -> Manage users

The screenshot shows the ExLibris Developer Network interface. At the top, there is a navigation bar with links for 'New Here?', 'API Console', 'Standards', 'Search', and 'Go to exlibrisgroup.com'. Below this is a dark blue header with the ExLibris logo and the text 'DEVELOPER NETWORK'. The main navigation menu includes 'Learn Documentation', 'Build My APIs', 'Share Blog', 'Ask Forum', and 'Discover App Center'. The central content area features three white cards: 'API Keys' with a 'MANAGE KEYS' button, 'Reports' with an 'ANALYTICS' button, and 'Manage Users' with a 'USERS' button. A blue arrow points from the bottom of the 'Manage Users' card towards the 'USERS' button. The footer contains the ExLibris logo, links for 'Terms of Use', 'Trust Center', 'Privacy', and 'Report a problem', and social media icons for 'Follow Us' on Twitter, Facebook, LinkedIn, and YouTube.

Invite yourself and additional staff to create accounts

New Here? | API Console | Standards | Search | Go to exlibrisgroup.com

ExLibris a ProQuest Company | DEVELOPER NETWORK | Learn Documentation | **Build My APIs** | Share Blog | Ask Forum | Discover App Center

[Ex Libris Developer Network](#) > [My APIs](#) > [Manage Users](#)

Manage Users

Users in your institution

Below is a list of users who are currently associated with your institution Adler University (ADL) —Chicago, IL and Vancouver, British Columbia. To disassociate a user from your institution, click the 'Remove' link on the relevant row. You can invite additional users to join your institution [below](#).

Name	Email	Actions
01CARLI [redacted]	01CARLI [redacted]@CHANGE.ME.mail.com	Remove

Invite a user to your institution

To invite a user to your institution, enter their email address below. The user will receive an email invitation with a link to create a new account or associate an existing account with your institution.

Email address

Invite as user manager

Allow this user to invite/remove other users from your institution.

Now you are ready to create an “API Key”

The screenshot shows the ExLibris Developer Network website. The top navigation bar includes links for 'New Here?', 'API Console', 'Standards', 'Search', and 'Go to exlibrisgroup.com'. The main header features the ExLibris logo and the 'DEVELOPER NETWORK' title, followed by navigation links: 'Learn Documentation', 'Build My APIs', 'Share Blog', 'Ask Forum', and 'Discover App Center'. The main content area has three white cards on a light green background: 'API Keys' (with a key icon and 'MANAGE KEYS' button), 'Reports' (with a bar chart icon and 'ANALYTICS' button), and 'Manage Users' (with a gear icon and 'USERS' button). A blue arrow points to the 'MANAGE KEYS' button. The footer contains the ExLibris logo, 'Terms of Use | Trust Center | Privacy | Report a problem', and social media icons for 'Follow Us' (Twitter, Facebook, LinkedIn, YouTube).

New Here?

API Console

Standards

Search

Go to exlibrisgroup.com



DEVELOPER NETWORK

Learn
Documentation

Build
My APIs


Share
Blog

Ask
Forum

Discover
App Center

[Ex Libris Developer Network](#) > [My APIs](#) > [Manage API Keys](#)

Manage API Keys

Enabled	Name	API Key	Supported APIs	Action
<input checked="" type="checkbox"/>	test  <input type="button" value="Copy"/>	• Bibs - Production Read-only	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

[Add API Key](#)



[Terms of Use](#) | [Trust Center](#) | [Privacy](#) | [Report a problem](#)

© Copyright Ex Libris Ltd. 2019 | All Rights Reserved

Follow Us    



New Here? API Console Standards Search Go to exlibrisgroup.com

Add/Edit API Key

Name

Description


Enabled

Allowed IP Range
Optional - Only requests within the IP Range will be allowed. CIDR format (Example: 1.2.3.4/32)

Restriction Profile code
Optional - the code of the Integration Profile which limits access to specific vendors.

Permissions

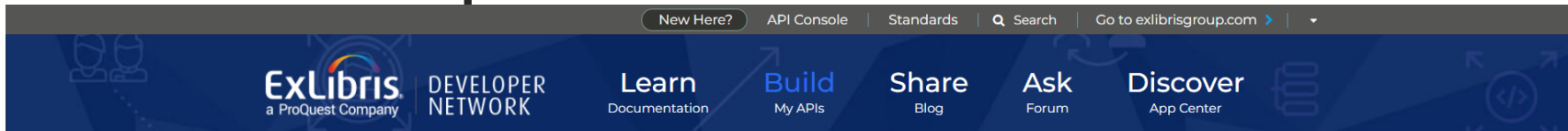
Area	Env	Permissions	Action
<input type="button" value="Add Permission"/>			



The screenshot shows the ExLibris developer portal interface. A modal window is open for configuring permissions for a specific service. The modal contains a list of services, with 'Acquisition' selected. Below the list, there are fields for environment (Production), permissions (Read-only and Read/write), and a Delete button. At the bottom of the modal are 'Add Permission', 'Save', and 'Cancel' buttons.

Env	Permissions	Action
Production	<input type="radio"/> Read-only <input checked="" type="radio"/> Read/write	Delete

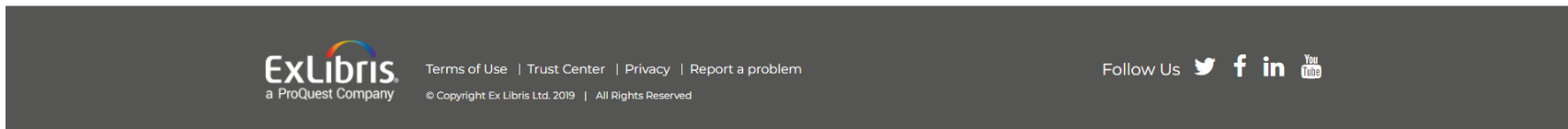
API keys are unique text strings associated with your IZ and has is associated with permission levels.



Ex Libris Developer Network > My APIs > Manage API Keys

Manage API Keys

Enabled	Name	API Key	Supported APIs	Action
<input checked="" type="checkbox"/>	Spine-0-Matic	18xxbc8ed203934b4Fc08a76 Copy	• Bibs - Production Read-only	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input checked="" type="checkbox"/>	test Copy	• Bibs - Production Read/write	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

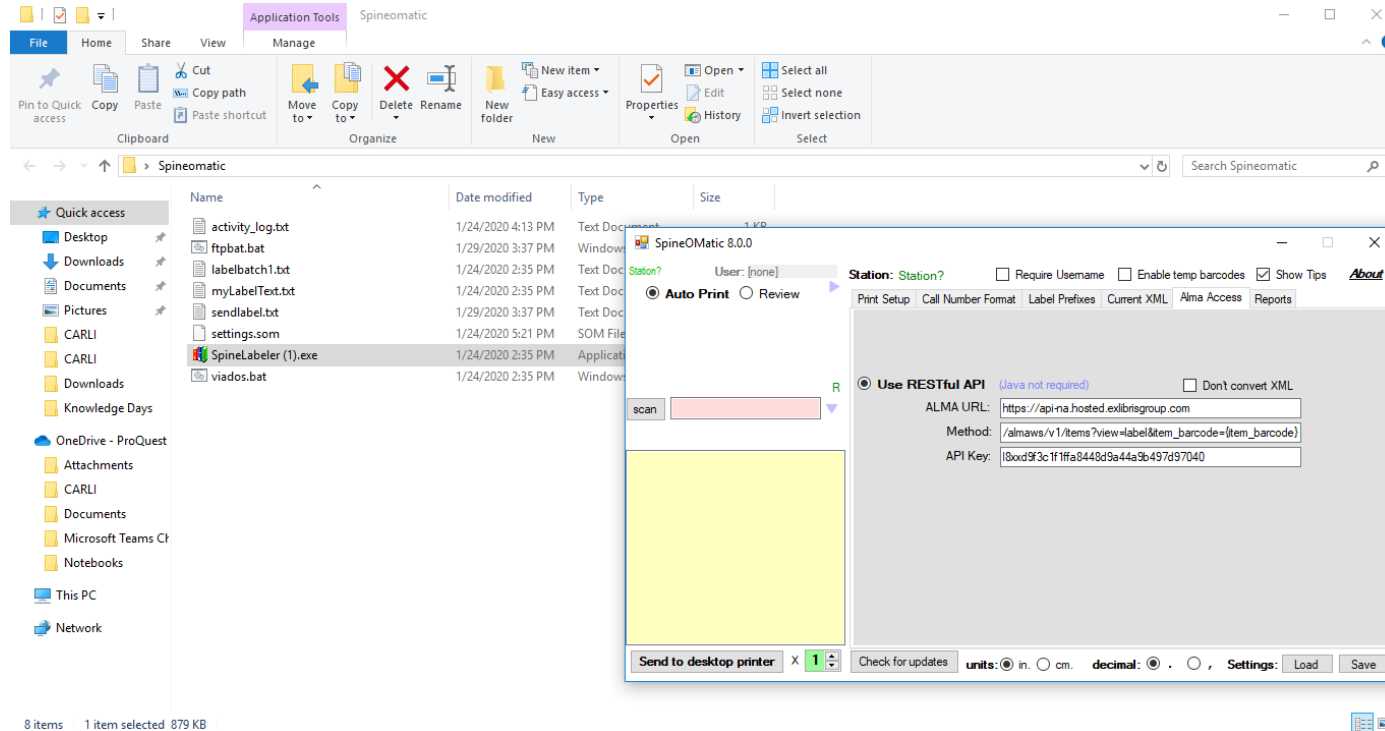




- Getting Started with the Developers' Network
- **Spine-o-Matic**
- Project Review
- Authentication in Alma
- Open Athens considerations
- Upcoming Topics

1. Install in an empty directory

2. Copy API key and enter the Alma URL in the Alma Access tab: <https://api-na.hosted.exlibrisgroup.com>



Configure your Printer

The screenshot shows the SpineOMatic 8.0.0 application window. At the top, there are window controls and a title bar. Below the title bar, there's a 'Station?' field with a dropdown menu showing 'User: [none]'. To the right, there are checkboxes for 'Require Username', 'Enable temp barcodes', and 'Show Tips', along with an 'About' link. A 'Print Setup' tab is selected, showing 'Spine Labels' configuration. The 'Printer type' is set to 'Batch print'. The printer is 'Microsoft Print to PDF'. Text font is 'Microsoft Sans Serif' (Size 10, not bold). Barcode font is 'Please select barcode font' (Size 13, not bold). Rows: 5, Label height: 2.0 in, Gap height: 0.0 in. Columns: 8, Label width: 1.0 in, Gap width: 0.0 in. First label prints at: Row 1, Col 1. A 'Preview/print' button is visible. 'Batch #' is 1, 'Entries' is 0. There's an 'erase' button. Margins: Top 0.1, Left 0.1, Line spacing 0.2 in. Orientation: Portrait. Maximums: Lines/label 7, Chars/line 9. 'use viados.bat' is unchecked. At the bottom, there are buttons for 'Add to batch #1', 'Check for updates', 'units' (in/cm), 'decimal' (./), and 'Settings' (Load/Save).

Station? User: [none] Station: Station? Require Username Enable temp barcodes Show Tips [About](#)

Auto Add Review

Print Setup Call Number Format Label Prefixes Current XML Alma Access Reports

Spine Labels

Printer type: Single label desktop Batch print FTP Label Printer

Printer: Microsoft Print to PDF ... Top margin: 0.1

Text font: Microsoft Sans Serif Size: 10 bold ... Left margin: 0.1

Barcode font: Please select barcode font Size: 13 bold ... Line spacing: 0.2 in.

Rows: 5 Label height: 2.0 in. Gap height: 0.0 in.

Columns: 8 Label width: 1.0 in. Gap width: 0.0 in.

First label prints at: Row 1, Col 1

Preview/print Batch #: 1 Entries: 0

erase

Portrait Landscape

Maximums: Lines/label: 7 Chars/line: 9

use viados.bat

Add to batch #1 x 1

Check for updates units: in. cm. decimal: . , Settings: Load Save

***** ERROR *****
Can't retrieve XML file.
Error message: The remote server returned an error: (400) Bad Request.

Highly customizable for local policies.

The screenshot displays the Alma interface for physical items. The search results show two items. The first item, 'The prince / Niccolò Machiavelli ; edited and translated by David Wootton', has a call number '320.1 M149p 1995' highlighted in red. A second item, 'Shijie = The world / Lumen F. Ichijama, Ren Zhong Lun ; di...', has a call number '320.1 M149p 1995' also highlighted in red. A dialog box titled 'SpineOMatic 8.0.0' is open, showing the 'Tweak and Test SpineOMatic's Call Number & Holdings Parsing' settings. The 'Test' button is highlighted in red, and a red arrow points from the call number in the search results to this button. The dialog box shows various settings for call number parsing, including 'Class Numerics', 'Class Decimal', 'Before Cutter', 'In Cutter', and 'Other' options. The 'Test' button is labeled 'Test' and has a tooltip that reads: 'Enter a call number and a type, or select one of the samples provided. Click 'test' to see how SpineOMatic will parse it.'

Next Steps:

- <https://developers.exlibrisgroup.com/blog/spineomatic-label-printing-software-for-alma/>
- <https://github.com/ExLibrisGroup/SpineOMatic>
- Test with your Test Load environments
- API keys will persist at go-live.

Other options:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/080Configuring_Resource_Management/120Configuring_the_Label_Printing_Tool](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/120Configuring_the_Label_Printing_Tool)

Receipt Printers: <https://developers.exlibrisgroup.com/blog/browser-extensions-to-print-alma-loans-receipts/>



- Getting Started with the Developers' Network
- Spine-o-Matic
- **Project Review**
- Authentication in Alma
- Open Athens considerations
- Upcoming Topics

PROJECT MILESTONES: TEST LOAD AND CUTOVER

Milestones	Date
Submit Test Load Data Inputs	July-September 2019
Deliver Alma Test Load	October 2019
Deliver PrimoVE Test Load	October 2019
<u>Test Load Period: Authentication, User Management, configuration and “Day 1” integrations</u>	<u>October 2019 – April 2020</u>
Production Load inputs due	May 2020
Alma Production Load (also known as “Cutover”)	June 2020
Data Checking and Fulfillment Reload	June 2020
Go-Live	June 24, 2020



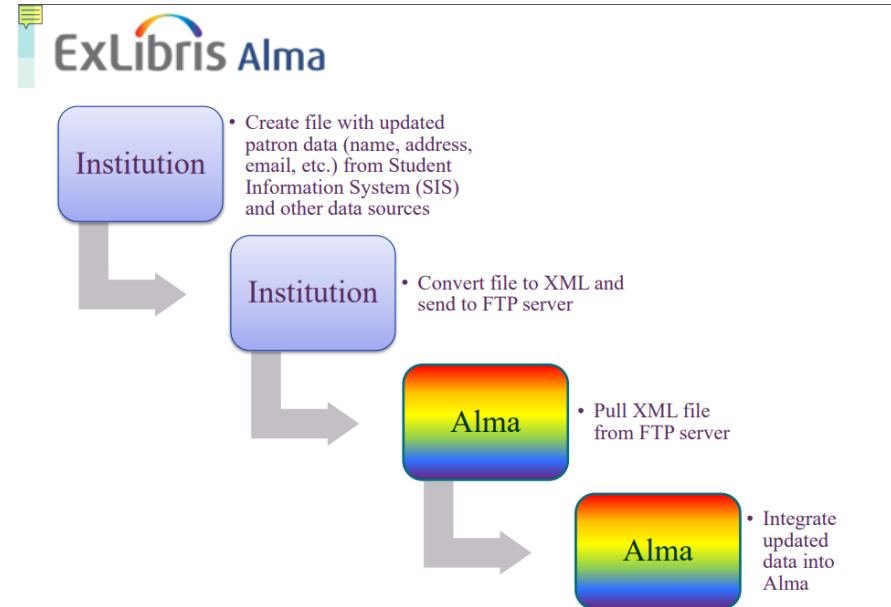
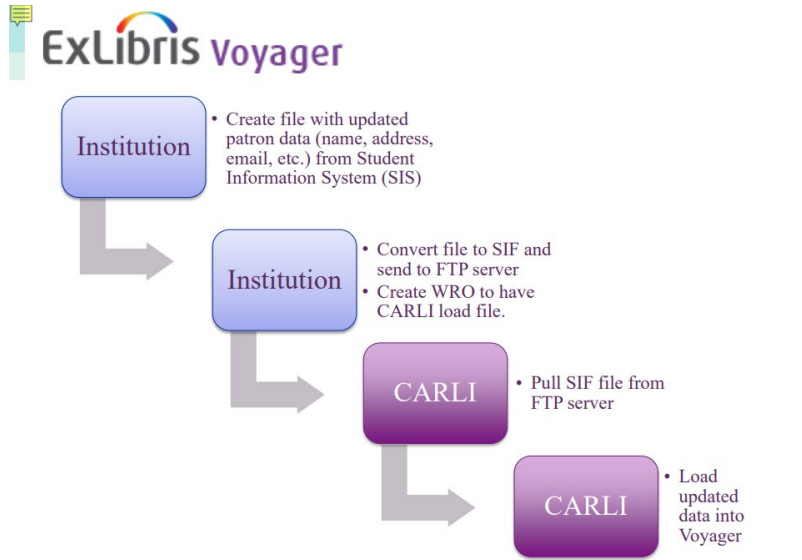
Along with the Alma and Primo VE software, Ex Libris provides:

- Alma online self-paced training
- Premium migration from Voyager to Alma
Includes acquisitions, course reserves
- Primo VE implementation with Alma
- Link resolver migration to Alma
- Alma workshops
- Third Party integrations setup support
E.g., Connections to student information systems, authentication services, self-check machines, external cataloging clients, and financial systems

- In October, each institution will receive a full test environment containing both Alma and Primo VE and all of your “real” data.
- From **October-April** you will work with CARLI and Ex Libris to test your data, train your staff, integrate 3rd party tools, review migration inputs and prepare your staff and users for the move to Alma and Primo VE.
- **Integrations with institutional IT involvement: Authentication, SIS (User information Systems), financial, and printing must be set up and tested during this time.**
- The Test Load is an opportunity to test "what would happen if..." with empirical results. Perfection is nice, but not our goal.

November 21, 2019 Office hours

<https://developers.exlibrisgroup.com/alma/integrations/user-management/sis/>
[https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/090Integrations with External Systems/050User Management/010Student Information Systems](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/050User_Management/010Student_Information_Systems)



Synchronization via SIS is the foundation for Authentication

- Determine if the required data is **located** in your SIS or another institutional system
- Create / **define** unique patron identifier
- You can work independently if you are so inclined. There are many sources of documentation and you can reach out to us as needed. **Nothing to stop anyone with starting to work with their test system.**

Milestones

- **Working with Pilots:**
Now – January
- **CARLI Refines Documentation:**
January
- **Ready for Testing SIS Implementation at **all institutions:****
January – March

Priorities for the Test Load Period

- SIS and Authentication are the two top priorities for a successful go-live. These ensure your patrons are able to make *requests* for physical items and *access* full-text electronic resources.
- Additional integrations **you are currently using with Voyager** should also be prioritized and verified as working with your Alma environments **before** the Technical and Configuration Freezes this summer.

- <https://developers.exlibrisgroup.com/alma/integrations/videos/>

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma Online Help \(English\)/090Integrations with External Systems](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems)

This unique patron identifier in user records is the “match point” between Alma and your Authentication system.

- Determine if the required data is **located** in your SIS or another institutional system
- Create / **define** unique patron identifier
- You can work independently if you are so inclined. There are many sources of documentation and you can reach out to us as needed. **Nothing to stop anyone with starting to work with their test system.**

Milestones

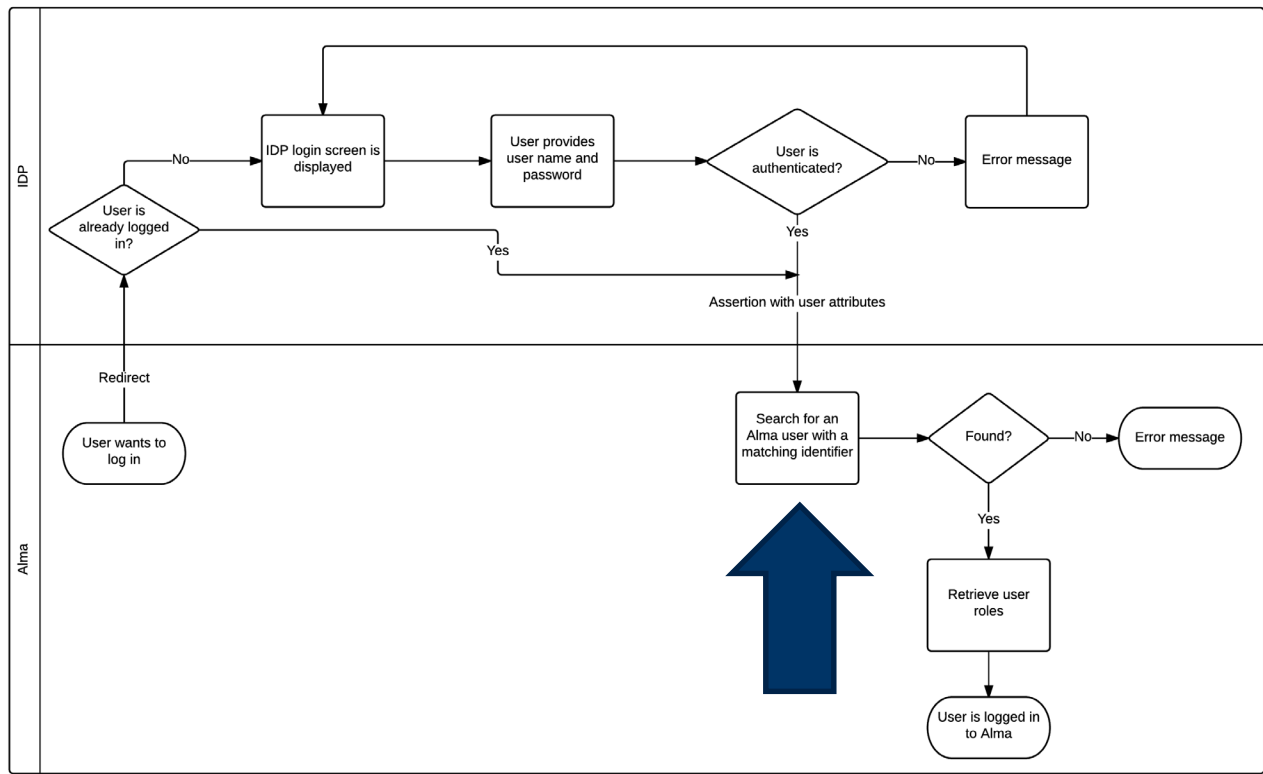
- **Working with Pilots:**
Now – January
- **CARLI Refines Documentation:**
January
- **Ready for Testing SIS Implementation at **all institutions:****
January – March



- Getting Started with the Developers' Network
- Spine-o-Matic
- Project Review
- **Authentication in Alma (non-technical)**
- Open Athens considerations
- Upcoming Topics

Alma is only searching for a matching identifier for the user

https://developers.exlibrisgroup.com/alma/integrations/user-management/authentication/inst_idp/saml/



For Primo VE the same process is happening but Alma is only searching for a valid Patron Role.

The Alma authentication integration establishes secure communication between the IdP and Alma and can be configured by our infrastructure team

SAML DEFINITIONS

Metadata upload method Metadata link Metadata upload

Metadata file link Populate Profile

Default SAML profile

IdP issuer *

IdP login URL *

User ID location * **User ID is in an Attribute element** ▼

User ID attribute name *

IdP logout URL

IdP single logout service

Sign single logout requests

Alma metadata file version * **Version 2 | Expiration date: 01 July 2114, Signed by: Self Signed, Signature algorithm: sha1RSA** ▼ Generate Metadata File

Certificate upload method Free-text certificate JKS file Certificate file

Upload certificate 📁 Certificate file already exists

Ex Libris form for those not selecting OpenAthens.

The image shows a screenshot of a web form titled "SAML SSO AUTHENTICATION SYSTEM" displayed within a spreadsheet application. The form is organized into sections: "IDP INFORMATION" and "FEDERATION INFORMATION (OPTIONAL)".

SAML SSO AUTHENTICATION SYSTEM

Please note that an asterisk denotes a mandatory field.

IDP INFORMATION

System: * (Select from list) [dropdown menu]

IdP issuer / entity ID¹: * [text input] ¹ The entity ID is a unique name which identifies an Identity Provider (IdP) or a Service Provider (SP).

IdP Metadata URL²: * [text input] ² Location of the IdP metadata if online. Otherwise, please attach XML file.

IdP login URL³: * [text input] ³ The login URL must be of type HTTP-redirect, POST login endpoints are not supported

IdP logout URL: * [text input]

Is the IdP ADFS? [No] [radio button]

User ID attribute name released to SP⁴: * [text input] ⁴ Alma will match this attribute to the user's primaryID. Please insert the attribute name exactly as it will appear in the SAML response.

Patron information retrieved from: * [text input] Note: If your institution uses Alma, please select Alma for patron information retrieval.

FEDERATION INFORMATION (OPTIONAL)

If you are a member of any Authentication Federation, fill in the necessary information below. Otherwise, skip this section.

Name of the federation: [text input]

URL to federation metadata: [text input]

At the bottom of the spreadsheet, there is a navigation bar with tabs: "Main", "SAML-based" (selected), "LDAP", "Social Login + Email", "CAS", and a plus sign icon.

- If you will retain your current IdP solution our Infrastructure Team's purpose is to establish this integration during the Test Load period after receiving our form with basic information and contact information for your IT department.
- CARLI to distribute this form to you.

Integration Testing prior to Tech/Configuration Freeze

- After this integration is complete your staff can sign into Alma with your institutional credentials.
- Primo VE authentication will also be configured and tested.
- We are **essentially reversing** the Toggle to Internal User process used at Test Load Delivery. <https://www.carli.illinois.edu/products-services/i-share/alma/prepare-useraccounts>
- **This configuration and the security certificates are retained at Go-Live. This is how you ensure a smooth go-live for your users.**
- In some cases institutions with multiple *Identity service Providers (IdP)* can be managed in Primo VE configuration and if Alma users need to log-on via different authentication services the non-default profile can be queried with this structured URL:
`https://alma.exlibrisgroup.com/institution/INST_CODE/SAML/idpCode/{specific SAML integration profile code}`



- Getting Started with the Developers' Network
- Spine-o-Matic
- Project Review
- Authentication in Alma
- **Open Athens considerations**
- Upcoming Topics

OpenAthens

- Will not replace the need for SIS, API or other strategy for updating user records in Alma.

Unique Features/Opportunities:

- Can serve as a stand-alone IdP service or a federated SAML service connecting to multiple campus systems where needed.
- It ALSO can serve as your Proxy for Full-Text e-resources
- As a proxy it has robust functionality to restrict full-text access to subsets of your users (see also: [Alma inventory management groups](#))

OpenAthens Phase 1 Slide (from yesterday's presentation)

Viewing Amanda Ferrante (i...

Phase 1

1. OpenAthens Phase 1 Questionnaire

CARLI library gathers information needed to begin the OA configuration, including:

- Who in the library or IT will be included on correspondence?
- • Information about Identity Provider connection (need assistance from IT)
- Information about ExLibris Alma/Primo VE setup, including attribute mapping

The *Phase 1* questionnaire to be completed by CARLI libraries [can be found here](#).

Note: User attribute mapping information is only relevant for Primo Classic and is not needed.



Technical documentation

Relevant for any SAML integration:

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/090Integrations_with_External_Systems/060Authentication/020SAML-Based_Single_Sign-On_Sign-Off](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/060Authentication/020SAML-Based_Single_Sign-On_Sign-Off)
- https://developers.exlibrisgroup.com/alma/integrations/user-management/authentication/inst_idp/saml/
- https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/030Authentication_Configuration/010Configuring_User_Authentication_for_Primo_VE

Not Relevant for CARLI institutions:

- https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Back_Office_Guide/040Primo_User_Authentication/070Attribute_Mapping

OpenAthens demo (from yesterday's presentation)

The screenshot shows the OpenAthens administrator interface for user Amanda Ferrante. The browser address bar indicates the URL: `admin.openathens.net/?ADMINISTRATOR=millersville#ReleasePolicies:`. The interface is organized into several sections:

- Released attributes:** A list of attributes with green checkmarks indicating they are released: `urn:oid:MNumber`, `Role`, `Entitlement`, `Staff/student number`, `First name(s)`, `Email address`, `Organisation ID`, `Username`, `eduPersonTargetID`, `Persistent user identifier`, and `Last name`.
- Released SAML NameID:** A single attribute, `Username`, is checked.
- Attribute aliases:** A text box contains the mapping: `username mapped to RemoteUser`.
- Alma:** A list of attributes with checkboxes. The `urn:oid:MNumber` attribute is checked, while others like `Username`, `Title`, `First name(s)`, `Last name`, `Department`, `Position`, `Email address`, `Phone number`, `Fax number`, `Staff/student number`, `Postal address`, `eduPersonTargetID`, `Targeted ID (scoped)`, `Organisation ID`, `Persistent user identifier`, `Role`, and `Entitlement` are unchecked. Below this list are buttons for `Done`, `Cancel`, and `Advanced...`. A large blue arrow points to the checked `urn:oid:MNumber` attribute.
- ArchiveSpace:** A list of attributes with green checkmarks: `Role`, `Persistent user identifier`, `Email address`, `First name(s)`, `Organisation ID`, `urn:oid:MNumber`, `Last name`, and `Username`.

User ID attribute will usually be the Primary ID in Alma

SAML SSO AUTHENTICATION SYSTEM

Please note that an asterisk denotes a mandatory field.

IDP INFORMATION

System: *	<input type="text" value="(Select from list)"/>	
IdP issuer / entity ID ¹ : *	<input type="text"/>	¹ The entity ID is a unique name which identifies an Identity Provider (IdP) or a Service Provider (SP).
IdP Metadata URL ² : *	<input type="text"/>	² Location of the IdP metadata if online. Otherwise, please attach XML file.
IdP login URL ³ : *	<input type="text"/>	³ The login URL must be of type HTTP-redirect, POST login endpoints are not supported
IdP logout URL: *	<input type="text"/>	
Is the IdP ADFS?	<input type="text" value="No"/>	
User ID attribute name released to SP ⁴ : *	<input type="text"/>	⁴ Alma will match this attribute to the user's primaryID. Please insert the attribute name exactly as it will appear in the SAML response.
Patron information retrieved from: *	<input type="text"/>	

Note: If your institution uses Alma, please select Alma for patron information retrieval.

FEDERATION INFORMATION (OPTIONAL)

If you are a member of any Authentication Federation, fill in the necessary information below. Otherwise, skip this section.

Name of the federation:	<input type="text"/>
URL to federation metadata:	<input type="text"/>

Navigation: Main | **SAML-based** | LDAP | Social Login + Email | CAS | +

OpenAthens Phase 2 Slide (from yesterday's presentation)

Viewing Amanda Ferrante (L...

Phase 2

2. Vendor contact

EBSCO contacts all service providers to give them OpenAthens account details. This is a quiet phase for the library, so a good time for OpenAthens administrator training with EBSCO's trainers:

- Schedule of monthly online training sessions led by EBSCO's experts [can be found here](#)
- Self-led trainings can be found at [OpenAthens' Virtual Learning Environment](#)



| www.ebsco.com/openathens

EBSCO |  OpenAthens



“Phase 2” considerations:

- As a proxy service they are able to facilitate the required step to notify your e-content providers of your new “base URL”

PREPARING FOR THE PRODUCTION LOAD

Spring 2020

- Libraries will update migration, P2E and non-SFX link resolver forms
- CARLI prepares final data extracts from Voyager and SFX
- Everyone reviews and plans for cutover schedule, including informing all stakeholders (patrons, campus units, vendors)
- Begin informing content providers of upcoming change to your institution’s base URL (for institutions currently using a link resolver)
- Review a *Go-Live Readiness Checklist* with the CARLI and Ex Libris project team prior to cutover start

`https://<Primo_domain>/discovery/o
penurl?institution=<Alma_institution
_code>&vid=<view_code>&`

https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Base_URL_Configuration

Final note on Proxy

PROXY	
Code	PROXY
Integration Type	Resolver Proxy
Managed in Network	No

General Information Actions Contact Info

PROXY DEFINITIONS

Proxy server type * **EZProxy**

Proxy url * **Must be the correct prefix**

Proxy ip * **can be any value**

Use Proxy * **Selective**

Electronic Service Editor

Collection name Taylor & Francis Journals Compl... Collection ID 6116889990005821

Service ID 6216889980005821 View all services

Service type Full Text

Provider package code (DB id) AASQA, AATTQ, AAYMM, ABALO, ...

Activation Service Description **Linking** Portfolios Notes History

General Linking Information

Parser **TAYFRA::journal**

Parser (override)

Parser parameters **url=https://www.tandfonline.com & shib=\$SSHIBBOLETH & u_shib=\$SU_SHIBBOLETH**

Parser parameters (override)

URL type Dynamic URL Parser Parameters

Linking level **Article DOI**

Service is free? **Not Free**

Crossref supported **Yes**

Crossref enabled No Yes INHERIT

Proxy enabled No Yes

Proxy selected **Default (currently: PROXY)**

Link Resolver Plugin

https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/What_is_the_exact_reason_why_the_IP_address_of_their_EZProxy_server_is_needed_when_adding_the_Proxy_to_Alma_in_the_Integration_Profiles_area%3F

What needs to work?

- To place a Primo VE request:
 1. User is recognized in the Identity Service Provider (IdP)
 2. User is recognized by the shared identifier in Alma with a valid patron role.
- To access full-text successfully”
 1. User is recognized by the IdP
 2. User identifier matches in Alma
 3. Proxy is enabled in the electronic service for that resource
 4. The content provider and the proxy service recognize your right to that resource



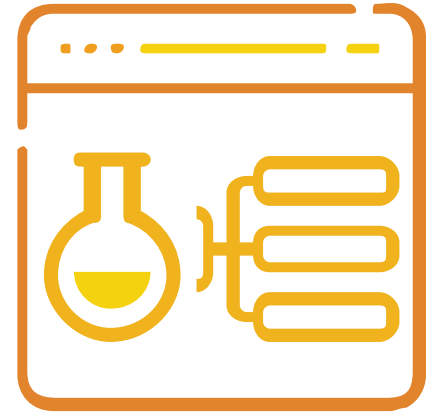
- Getting Started with the Developers' Network
- Spine-o-Matic
- Project Review
- Authentication in Alma
- Open Athens considerations
- **Upcoming Topics**

February 6: Work Order Department Configuration

- Reflect on how you are currently processing new items, items in need of repair or other times items are taken from the shelf for staff work.
- **Are you currently using pseudo patrons/locations for staff work?** Identify those and consider transitioning to work order departments or statuses for these tasks and try it out with your items currently on your carts.
- Test Load is the period where you can customize Alma to reflect how your organization actually works. Alma is intimidating but flexible and forgiving with persistent troubleshooting.

Things to Consider Before the Work Order Presentation:

- Work Orders are useful in situations when an item needs to be taken out of circulation for a short time
- Is the process or workflow required for a situation covered in another functional area of Alma?
 - Missing items
 - Repairing/Preserving Items
 - Lost items
 - Working with Metadata
 - External Resource Sharing Lending services



Best Practices

- Create work order types at the institution level
- If there is one physical department at your institution where all staff are sitting in the same room or area or in close proximity to each other, our recommendation is to use a single department with additional statuses.
- If your institution has different physical departments, we recommend creating distinct work order departments. If each department performs distinct processes, we recommend creating distinct work order types, each with its own statuses.



Things to Consider

- Do you need multiple work order departments?
- Do you need multiple work order statuses?
- Staffing—do people perform multiple tasks?

One Work Order Department

Operators can filter according to the status that they perform within the work order department

Multiple Work Order Departments

Operators may need to scan in and send items to each work order department

Staff may need to change their “Currently at” location to see items in other work order departments

February 13: Reviewing P2E and Link Resolver Data

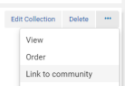
- We encourage you to review the Oct 3rd presentation on this topic as there will be significant overlap:

<https://www.carli.illinois.edu/products-services/i-share/alma/CARLIOOfficeHours>

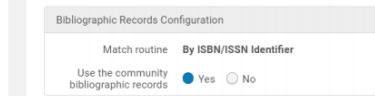
Recommended Processes for Data Clean-up: Post Go Live

Link P2E portfolios to CZ Collection (Takes care of LR/P2E duplication!)

- Do everything on the previous 2 slides (add standalone portfolios to a local collection).
- From the collection, click actions >> Link to Community



- Choose your collection
- Specify whether to use your bibs or the CZ bibs

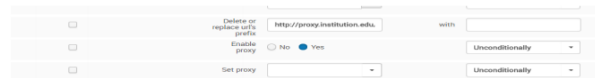


Recommended Processes for Data Clean-up: Post Go Live

Remove proxy prefix from P2E portfolio URL

Clean-up

- Create a set of standalone portfolios
 - Electronic Portfolio "Is Standalone" equals "Yes"
 - URL contains "http://proxy.institution.edu/login?url=")
 - Save Query
- Run the "Change Electronic Portfolio Information" Job



- **Result:** EZProxy prefix is removed



Thank you!

Questions?

Thank you!

Join us next Thursday at 2pm for another Office Hour

You can always contact CARLI at support@carli.Illinois.edu