



What to expect when setting up External Authentication and changing your Proxy.

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- **What to expect when setting up External Authentication with Alma (AKA OpenAthens Phase 1).**
- How to update your Proxy Integration information when switching to the OpenAthens redirector or any new Proxy tool. (AKA OpenAthens Phase 2)
- Additional info for Go-Live

OpenAthens Opt-Ins please confirm this step via email:

Dear CARLI Group,

A new comment was received for case #0082xxxx:

Case Title: NA_PS June/2020 Alma Authentication - 01CARLI_xxx

Last comment:

Dear xxx,

We have completed the Alma/Primo-side configuration to work with your SAML IDP. You can get the Alma and Primo SAML SP metadata files using the links below:

https://i-share-xxx.alma.exlibrisgroup.com/view/saml/metadata?VERSION=VERSION_2025

https://i-share-xxx.primo.exlibrisgroup.com/view/saml/metadata?VERSION=VERSION_2025

Please register the SPs with your IDP and let me know when this is done, or if you need more information.

In order for us to proceed with our testing, we require a **test SAML account**. Feel free to send us a test username and password via this case, or alternatively, you can send it to my private email address xxx@exlibrisgroup.com

OA Opt-Outs: SAML (non-OA), ADFS, CAS, LDAP

- You will receive a similar message asking to confirm similar information:
 - Add the Alma and Primo services to your CAS.
The Alma service is located here:
<https://i-share-xxx.alma.exlibrisgroup.com/>*
The Primo service is located here:
<https://i-share-xxx.primo.exlibrisgroup.com/>*
The IP to be allowed in the firewall for Alma and Primo is:
XXX.XXX.XXX.XXX

Where to Toggle the User.

The screenshot displays the Alma user management interface. At the top, there is a navigation bar with options like 'Acquisitions', 'Resources', 'Discovery', 'Fulfillment', 'Admin', and 'Analytics'. Below this, a search bar contains 'Users' and 'All'. The main content area is titled 'User Details' and shows the profile for 'Braun, Connie'. A red box highlights the 'Account Type' dropdown menu, which is currently set to 'Internal'. Another red box highlights a 'Toggle Account Type' button in the top right corner of the user details section. Below the user profile, there are several tabs: 'General Information', 'Contact Information', 'Identifiers', 'Notes', 'Blocks', 'Fines/Fees', 'Demerits', 'Statistics', 'Attachments', 'Proxy For', and 'History'. The 'User Information' section is expanded, showing a form with fields for 'First name', 'Last name', 'Preferred middle name', 'Primary identifier', 'PIN number', 'Job description', 'User group', 'Website URL', 'Status', 'Birth date', 'Purge date', 'Middle name', 'Preferred first name', 'Preferred last name', 'Title', 'Job category', 'Gender', 'Campus', 'Preferred language', 'Status date', 'Expiration date', and 'Resource sharing library'. The 'User group' is set to 'Staff' and the 'Status' is 'Active'.

The Alma role “User Manager/Admin” enables “toggling” the account. Please also confirm a staff role for Alma testing.

Confirmation Message

User Account Type and all the user's segments will be changed from Internal to External and the password will be removed . Continue?

Cancel

Confirm

User Roles

1 - 2 of 2

[+ Add Role](#) [+ Add from Profiles](#) [- Remove Selected](#) [📄](#) [⚙️](#)

	<input type="checkbox"/>	Active	Role Name	Role Area	Status Date	Expiry Date	
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Patron	Fulfillment	11/19/2019	-	⋮
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Requests Operator	Fulfillment	04/16/2020	-	⋮

To use external authentication your Alma URL will change.

We will provide the specific link to test via the Salesforce case:

- <https://i-share-xxx.alma.exlibrisgroup.com/CAS>
- <https://i-share-xxx.alma.exlibrisgroup.com/SAML> (Open Athens)
- You will also need to test a staff user and change their account to external:

< User Details Toggle Account Type Cancel Save

Test, AFN BEN i v

ID	ben_afn	Account Type Internal	Identity Service	Used
Record type	Public	User group FACULTY		

Manage fulfillment activities

If external authentication fails report the errors via the Salesforce email and reset this account to internal if you need to continue using it.

The screenshot displays a user management interface with a confirmation dialog box overlaid. The dialog box, titled "Confirmation Message", contains the text: "User Account Type and all the user's segments will be changed from External to Internal. Continue?". It features "Cancel" and "Confirm" buttons. Below the dialog, the user's profile information is visible, including fields for "Purge date" (02/01/2041), "Last patron activity date" (04/14/2020), "Resource sharing library", "Cataloger level" ([00] Default Level), "Purchase request library", and "Send message" (General mail). A red arrow points to the "Password" field in the "User Management Information" section. The "Save" button is highlighted with a red box.

Confirmation Message

User Account Type and all the user's segments will be changed from External to Internal. Continue?

Cancel Confirm

Account Type Cancel Save

ben_afn Account Type External Identity Service Not Used
Public User group FACULTY

Purge date 02/01/2041 Last patron activity date 04/14/2020
Resource sharing library Purchase request library
Cataloger level [00] Default Level
Selected Patron Letters Send message General mail Compose

User Management Information

Password
Verify password
Force password change on next login
Disable all login restrictions

Primo VE URLs do not change for external authentication:

https://i-share-xxx.primo.exlibrisgroup.com/discovery/search?vid=01CARLI_XXX:CARLI_XXX

User Authentication

Profiles Login labels

Authentications Profiles

1 - 2 of 2

Active	Code	Display Name	Integration type
<input checked="" type="checkbox"/>	Alma	Authentication via Alma	ALMA
<input checked="" type="checkbox"/>	SAML	SAML	SAML

Login Page Help Links

1 - 4 of 4

Active	Code	Label	URL
<input checked="" type="checkbox"/>	login.link1	NOT_DEFINED	-
<input checked="" type="checkbox"/>	login.link2	NOT_DEFINED	-
<input checked="" type="checkbox"/>	login.link3	NOT_DEFINED	-
<input checked="" type="checkbox"/>	login.link4	NOT_DEFINED	-

Authentication Settings

Single Sign Out Upon Timeout Enable Silent Login

Discovery (1)

Authentication

User Authentication

“Discovery – Admin” role in Alma allows access to Primo VE login configuration options.

Primo VE login labels and error messages can be customized

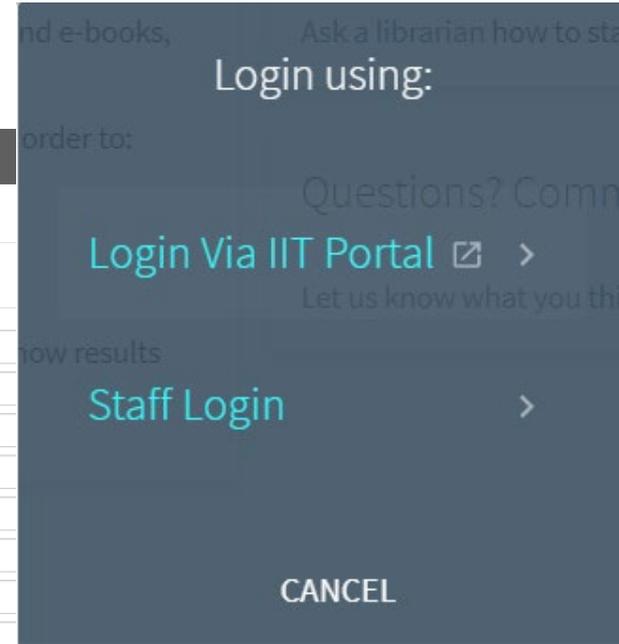


< Back to Alma Alma Configuration

User Authentication

Profiles | Login labels

login.login	<input type="text" value="Login"/>	login.title	<input type="text" value="Login here:"/>
login.cancel	<input type="text" value="Cancel"/>	login.userid	<input type="text" value="User ID"/>
login.password	<input type="text" value="Password"/>	login.dual.title	<input type="text" value="Login using:"/>
parallel.login.link1	<input type="text" value="Login Via IIT Portal"/>	parallel.login.description1	<input type="text"/>
parallel.login.link2	<input type="text" value="Staff Login"/>	parallel.login.description2	<input type="text"/>
parallel.login.link3	<input type="text" value="Login Link 3"/>	parallel.login.description3	<input type="text"/>
parallel.login.link4	<input type="text" value="Login Link 4"/>	parallel.login.description4	<input type="text"/>
parallel.login.link5	<input type="text" value="Login Link 5"/>	parallel.login.description5	<input type="text"/>
login.error.message	<input type="text" value="Invalid UserID and/or Password. Please re-enter"/>		



Authentication Documentation links

- Text:
- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/090Integrations with External Systems/060Authentication](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/060Authentication)
- https://developers.exlibrisgroup.com/alma/integrations/user-management/authentication/inst_idp/
- [https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/030Authentication Configuration/010Configuring User Authentication for Primo_VE](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/030Authentication_Configuration/010Configuring_User_Authentication_for_Primo_VE)
- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/030User_Management/010Managing Users#Editing Users \(step 5 toggle users\)](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/010Managing_Users#Editing_Users_(step_5_toggle_users))
- Video/ Implementation Tutorial:
[https://knowledge.exlibrisgroup.com/Alma/Implementation and Migration/Implementation Tutorials/03 Alma Integrations with External Systems/SAML-Based User Authentication](https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Tutorials/03_Alma_Integrations_with_External_Systems/SAML-Based_User_Authentication)



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- **How to update your Proxy Integration information when switching to the OpenAthens redirector or any new Proxy tool. (AKA OpenAthens Phase 2)**
- Additional info for Go-Live

At Test Load we set up your Proxy if you gave CARLI your info

6 PROXY PROXY_DEFAULT - Resolver Proxy exl_impl 10/18/2019

< Integration Profile Cancel Save

PROXY i v

Code PROXY
Integration Type Resolver Proxy
Managed in Network No

General Information Actions Contact Info

Name * PROXY

Default

Description

< Integration Profile Cancel Save

PROXY i v

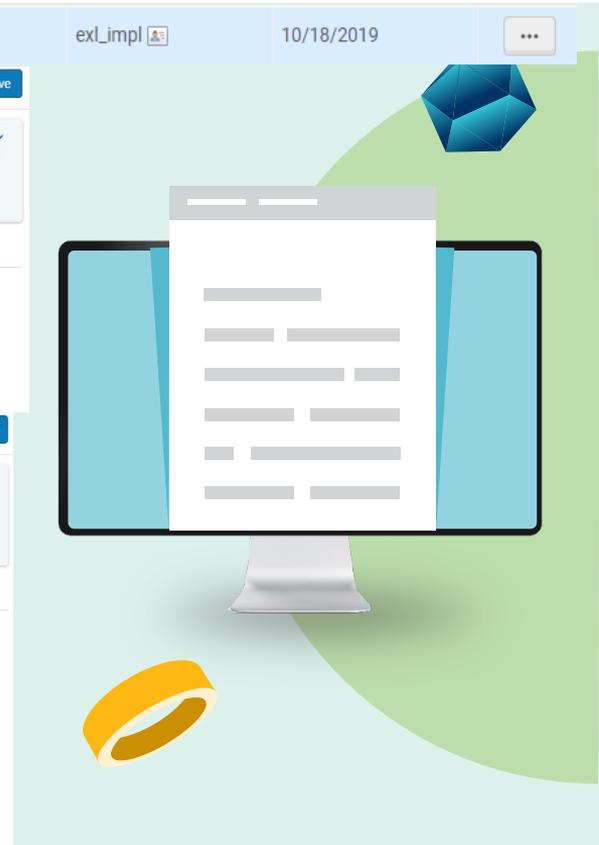
Code PROXY
Integration Type Resolver Proxy
Managed in Network No

General Information Actions Contact Info

PROXY DEFINITIONS

Proxy server type *

- Proxy url * EZProxy
- Proxy ip * WAM
- Use Proxy * LIBProxy
- OpenAthens
- OpenAthens Redirector
- Biblio-PAM
- HAN



How to add an additional Proxy integration

Alma Configuration
Sandbox

< Back to Alma

< Integration Profile List

1 - 3 of 3 Name [] []

+ Add Integration Profile

Integration Type: All

< Integration Profile

Code -
Integration Type -
Managed in Network No

Name * Proxy 2 Integration Type * Resolver Proxy

Default

Proxy 2

Code Proxy 2
Integration Type Resolver Proxy
Managed in Network No

General Information Actions Contact Info

PROXY DEFINITIONS

Proxy server type * OpenAthens Redirector

Proxy url * https://go.openathens.net/redirector/<your domain>

Proxy ip * 123.456.789.10

Use Proxy * Selective

Role: General
System Admin

Proxy ip: required but
can be a place-holder
Use Proxy: “Selective”
setting recommended

Proxy selection should be managed at the Service level

The screenshot shows the Alma interface with a navigation bar at the top containing 'Acquisitions', 'Resources', 'Discovery', 'Fulfillment', 'Admin', and 'Analytics'. The main content area displays a list of electronic collections. Two collections are visible:

- Collection 4: SAGE Complete**
 - Type: Selective package
 - Services: Full Text (Available from: 13/05/2018 until: 13/05/2019)
 - Interface name: SAGE
 - Linking Level: Article
 - Creation Date: 14/05/2018 14:51:49 CDT
 - Modification Date: 14/05/2018 16:39:22 CDT
 - Process type: Acquisition
- Collection 5: Wiley Online Library Database Model 2018**
 - Type: Aggregator package
 - Services: Full Text (Available)
 - Interface name: Wiley Online Library
 - Linking Level: Article

A context menu is open for the Wiley collection, with a red arrow pointing to the 'Edit Service' option. Other menu items include 'Descriptive Record', 'Delete', 'View', 'Additional order', 'Create E-Activation Task', 'Publishing information', 'View It', 'Report To Ex Libris', and 'Add Reminder'.

Linking level **Article**

Service is free? **Not Free**

Crossref supported **Yes**

Crossref enabled No Yes INHERIT

Proxy enabled No Yes

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

All portfolios inherit Proxy settings from the Service

Electronic Service Editor

Collection name: SAGE Complete Collection ID: 6165268070000503
Service type: Full Text Service ID: 6265268060000503
Provider package code (DB id): MBA,Q1R,SFC MMS ID: 99211810100503

Activation Service Description Linking **Portfolios** Notes History

General Linking Information

Parser: SAGE::Journals

Parser (override):

Parser parameters: url=http://journals.sagepub.com & url2=http://iam.atypon.com/action/ssostart & shib=SSSHIBBOLETH & u_shib=SSU_SHIBBOLETH

Parser parameters (override):

URL type: Dynamic URL Parser Parameters

Linking level: Article

Service is free? Not Free

Crossref supported: Yes

Crossref enabled: No Yes INHERIT

Proxy enabled: No Yes

Proxy selected:

Link Resolver Plugin: **Default (currently: Proxy)**

Plugin name: Proxy 2

Proxy

Linking Parser Parameters

Changing the Default Proxy allows you to switch the active proxy in bulk!

Step 1: observe default Proxy value = "Proxy"

Electronic Service Editor Cancel Save

Collection name	SAGE Complete	Collection ID	6165268070000503		
Service type	Full Text	Service ID	6265268060000503	View all services	
Provider package code (DB id)	MBA,Q1R,SFC	MMS ID	99211810100503		

Activation Service Description Linking Portfolios Notes History

General Linking Information

Parser **SAGE::Journals**

Parser (override)

Parser parameters **url=http://journals.sagepub.com & url2=http://iam.atypon.com/action/ssostart & shib=\$SSHIBBOLETH & u_shib=\$SU_SHIBBOLETH**

Parser parameters (override)

URL type Dynamic URL Parser Parameters

Linking level **Article**

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

Plugin name -

Linking Parser Parameters

Step 2: Remove Default for original Proxy

< Integration Profile List

Back

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[+ Add Integration Profile](#)

Integration Type: All

Name	Code	Description	Integration Type	Managed in Network	Updated By	Status Date	
1. BX	BX	-	Link Resolver Statistics		System	07/08/2016	
2. Proxy	PROXY_DEFAULT	-	Resolver Proxy		exl_impl	16/04/2020	
3. Proxy 2	PROXY	-					
4. Student Information System	SIS	St					



< Integration Profile

Proxy

Code Proxy
Integration Type Resolver Proxy
Managed in Network No

General Information

Actions

Contact Info

Name *

Default



uncheck and save

Description

Step 3: Make the new Proxy the Default Proxy

< Integration Profile List

Back

1 - 4 of 4

Name



+ Add Integration Profile



Integration Type: All

Name	Code	Description	Integration Type	Managed in Network	Updated By	Status Date	
1. BX	BX	-	Link Resolver Statistics		System	07/08/2016	...
2. Proxy	PROXY	-	Resolver Proxy		ex_limpl	16/04/2020	...
3. Proxy 2	PROXY_DEFAULT	-	Resolver Proxy		ex_limpl	16/04/2020	...
4. Student Information System	SIS	Student Information System	Users		Ex Libris	13/07/2011	...

Proxy 2

Code Proxy 2
Integration Type Resolver Proxy
Managed in Network No

General Information

Actions

Contact Info

Name * Proxy 2

Default



Description

Step 4: Confirm Proxy selected updated to the new Proxy.

Electronic Service Editor Cancel Save

Collection name	SAGE Complete	Collection ID	6165268070000503		
Service type	Full Text	Service ID	6265268060000503	View all services	
Provider package code (DB id)	MBA,Q1R,SFC	MMS ID	99211810100503		

Activation Service Description Linking Portfolios Notes History

General Linking Information

Parser SAGE::Journals

Parser (override)

Parser parameters url=http://journals.sagepub.com & url2=http://iam.atypon.com/action/ssostart & shib=SSSHIBBOLETH & u_shib=SSU_SHIBBOLETH

Parser parameters (override)

URL type Dynamic URL Parser Parameters

Linking level Article

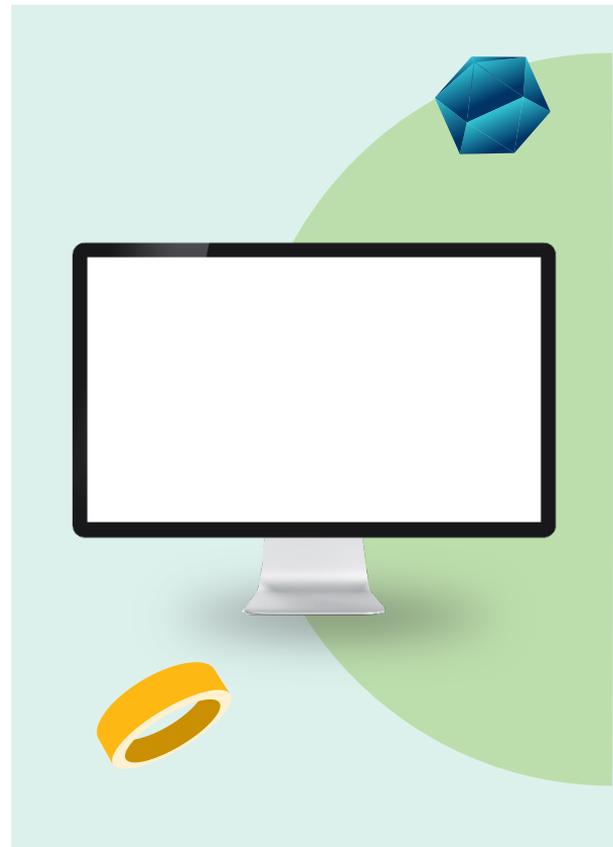
Service is free? Not Free

Crossref supported Yes

Crossref enabled No Yes INHERIT

Proxy enabled No Yes

Proxy selected Default (currently: Proxy 2)



Test the new Proxy in prior to your OA launch date!

Phase 2

4. Choose launch date

Planning for launch: EBSCO and the CARLI library will discuss when to launch. When we “launch” OpenAthens, we deploy OA links to your end users.

- Links in EBSCO platforms will be updated by EBSCO’s team
- Links in other library platforms (website, LibGuides, LMS, etc.) will be updated by the library; EBSCO will help and advise where possible
- EBSCO working with ExLibris to compile guidance for updating links in Alma/Primo VE

See also: [Communication to library patrons](#)

See also: [OpenAthens user journey](#)



Change your default Proxy in Alma to update all links

Viewing Amanda Ferrante (L...

Phase 2

5. Go live

Launch OpenAthens (update all links): on a scheduled date (to minimize transition time for end users), EBSCO and the CARLI library will update links in all platforms where end users access electronic resources.

Links will be updated to use OA syntax/prefix.



See also: [*Communication to library patrons*](#)

See also: [*OpenAthens user journey*](#)



www.ebsco.com/openathens

EBSCO |  OpenAthens



Proxy documentation:

- Text:
- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma Online Help \(English\)/090Integrations with External Systems/030Resource Management/220Resolver Proxies](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/030Resource_Management/220Resolver_Proxies)
- Video/Implementation Tutorial:
- [https://knowledge.exlibrisgroup.com/Alma/Implementation and Migration/Implementation Tutorials/03 Alma Integrations with External Systems/Resolver Proxy](https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Tutorials/03_Alma_Integrations_with_External_Systems/Resolver_Proxy)



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- **Additional info for Go-Live**

Your link resolver is changing. Update your content providers

I want to embed links to Primo VE in various indexes and full text resources. What's the base link resolver URL for my library's Alma instance?

This is the URL given to database vendors and often filled in the interface admin module for Open URL link resolving from citations. If you were an SFX library, this was `https://sfx.carli.illinois.edu/sfx***` where *** is your library's three letter code.

Complete documentation can be found at on the [➤ Configuring the Services Page for Primo VE](#). Below are the correct element configurations for I-Share libraries:

- **Primo_domain** – Specify the domain for your Primo server = **https://i-share-xxx.primo.exlibrisgroup.com** (where xxx is your library's three-letter I-Share code in lowercase)
- **Alma_institution_code** – Specify the institution code defined in Alma = **01CARLI_XXX** (where XXX is your library's three-letter I-Share code in UPPERCASE)
- **view_code** – Specify the code that is defined for your view on the View Configuration page = by default this will be **01CARLI_XXX:CARLI_XXX** (where XXX is your library's three-letter I-Share code in UPPERCASE) unless you have created another view
- Final URL looks like this: **https://i-share-xxx.primo.exlibrisgroup.com/openurl/01CARLI_XXX/01CARLI_XXX:CARLI_XXX?**

Please note that the string *must* end with a question mark (?)

Answered 1/7/2020

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

Review electronic resource workflows:

- <https://www.carli.illinois.edu/products-services/i-share/alma/CARLOfficeHours#OpenOffice2019>
- Practice **activating** electronic resources
- Review working with full text service linking parameters: [https://knowledge.exlibrisgroup.com/Alma/KnowledgeArticles/How to Update a Linking Parser Parameter](https://knowledge.exlibrisgroup.com/Alma/KnowledgeArticles/How%20to%20Update%20a%20Linking%20Parser%20Parameter)

Activation Wizard: Linking Information

1 2 3 ? Cancel Back Next

EBSCOhost Academic Search Complete

Type: Aggregator package
Number of portfolios: 10509
Electronic Collection Level URL: https://www.ebscohost.com/academic/academic-search-complete
Additional descriptive information: EBSCOhost Academic Search Complete

Full Text Service - Linking Parameters

Parameter Name	Value
1. SHIBBOLETH	
2. CUSTOMER_ID	
3. ATHENS_ID	
4. APL_USER_ID	
5. U_SHIBBOLETH	
6. SSO	yes

Full Text Service - Proxy setup

Proxy enabled No Yes

Proxy selected: Proxy 2

October 3, 2019

Reviewing P2E and Link Resolver Data



Slides

February 13, 2020

Reviewing P2E and Link Resolver Data



Slides



Thanks!