

Q&A Session

Ex Libris

Melbourne February 7, 2013



Question 1



Q: Will it be possible to have a “staff view ie: Marc tags” in Primo with Alma?



A: Traditionally Primo is for end users, Alma for staff users. However, we are looking at adding a ‘power-user’ view to Primo, whereby we will support more sophisticated options (sophisticated relative to the basic search). The design is not complete and we look forward to hearing from the customers what we should add to this view to make it useful for staff.

Question 2



Q: Google and other search engines rate URLs submitted through site maps based on how simple and persistent they are. The URLs produced by DigiTool and Primo tend to be complex and non-persistent. Does Ex Libris have any plans to make these products easily produce persistent and simple URLs?



A: Ex Libris is currently investigating Next Generation linking.

Question 3



Q: We would like the ability to add "me too's" in Salesforce. (The ability to publish cases and to unpublish cases if you change your mind is improved in Salesforce over Pivotal. This functionality is welcome but there doesn't seem to be a way to add support to a case that another institution has submitted.) ?

me, too.

A: We selected Salesforce, which is the best CRM system on the market, and paid top price, understanding its importance for our user community. Unfortunately, the "me too" functionality doesn't currently exist in Salesforce. We have a long list of developments and will consider this development as well.

Question 4



Q:SalesForce cases are being closed by Ex Libris before the change is available in a release making it difficult for customers to identify what should be tested in any given release.

Customers are then required to submit a new Salesforce case when the change does not appear or does not work as expected, and this new case is not linked to the closed one.

Could Ex Libris explain why 'Pending Upgrade' is no longer used?

As advised by Ex Libris in 2006: "This status was requested by customers for cases in which a period of time is needed to check a specific fix included in a Service Pack or in a soon to be released new version.

Question 5



Q. Customers are being advised of release dates for changes to Alma that arise from their Salesforce cases. However, often the change moves to a later release. How will customers be informed of the change of date and the reasons for the change?



A: Support works closely with Development using Jira, the system used by Development. We use Jira to enter issues and Development updates us on an ongoing basis on projected release dates and on any changes which had to be made due to evolving needs.

Question 6



Q: What are the major areas being developed or redeveloped for Alma in 2014 and how customers can provide advice on what they'd like to see?



A: We publish a roadmap highlights document ~every 6 months. We plan to upload a new version to the doc portal in the next few days. We also work with our customers in support and implementation to see what is needed from a product perspective.

Question 7



Q: When Primo customers search EBSCO API via Primo, full text links are provided via SFX. Is it possible to have the delivery of full text to change to linktorsrc so that both the availability and the delivery are the responsibility of EBSCO.

Too often we have found that SFX is unable to link to full text – usually because of a mismatch between EBSCO publications and SFX object portfolios. We believe that providing linktorsrc directly to EBSCO will reduce linking failure rate for clients.



A: From 4.5.1 you can configure Primo to use only Ebsco links directly. This is not the OTB setting but it can be changed. Details can be found in the Version 4 highlights page 99. Availability and delivery for EBSCO is now based on the configuration in the 'Using 856 Links in Remote Search Records' mapping table. An additional row has been added to the default configuration to define the LR_linktorsrc method for records from EBSCO.

Question 8



Q: Will ALMA-D include support for PREMIS – if so where does this leave Rosetta?

A: PREMIS is currently not supported by Alma digital functionality. We do have plans to support it to some extent as part of preservation functionality that is planned as part of Alma future roadmap.

PREMIS

PREMIS

PRESERVATION METADATA
MAINTENANCE ACTIVITY

Question 9



Q: When will the ALMA API server become available and what training will be made available/required to allow institutions to access the server?

The Focus

- Ex Libris has established a team whose focus is on improving open interfaces and integration scenarios
- The team is implementing a new API Platform, which will include several components, each of which targeting a different challenge
- The platform will cover all products, but will focus on our SaaS offerings

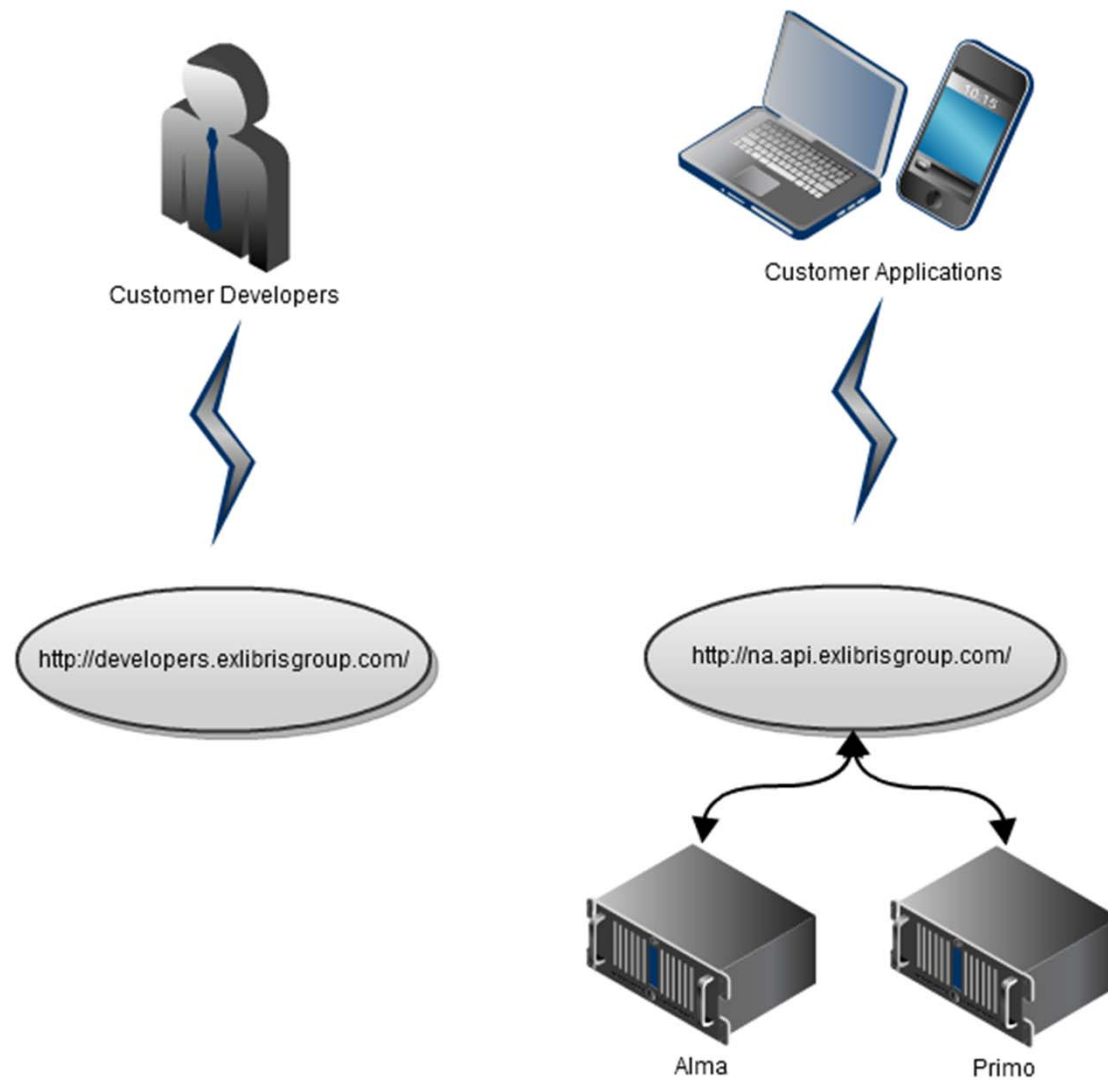
The Focus – Platform Components

- Developer Portal, the “next generation El Commons”
 - Provides a developer home page, with API overviews, documentation, How-To articles, blog entries, integration use cases and guides
 - Includes an API explorer, to help developers discover and test our APIs in the shortest time possible

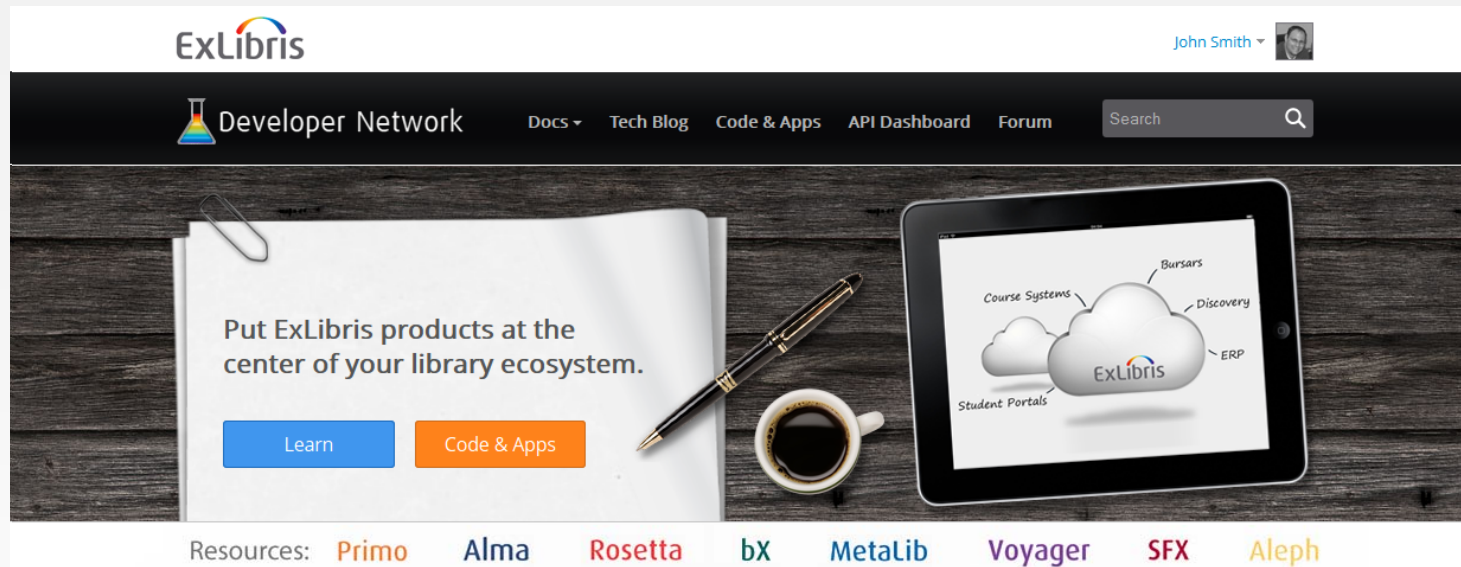
The Focus – Platform Components

- **API Proxy**
 - Provides a single endpoint for all open interfaces
 - Provides access to modern REST- and JSON- based APIs
 - Provides authentication via API keys and authentication standards
- **Community**
 - Provides a user-friendly platform for customers to share information
 - Forums, blogs, code contributions

The Focus - API Platform Concept



Developer Portal



The banner features the ExLibris logo in the top left, a user profile for John Smith in the top right, and a navigation bar with links for Docs, Tech Blog, Code & Apps, API Dashboard, and Forum, along with a search box. The main visual is a wooden desk with a notepad, a pen, a coffee cup, and a tablet. The notepad says "Put ExLibris products at the center of your library ecosystem." with "Learn" and "Code & Apps" buttons. The tablet shows a cloud diagram with ExLibris at the center, connected to Course Systems, Bursars, Discovery, ERP, and Student Portals. Below the banner is a row of product links: Primo, Alma, Rosetta, bX, Metalib, Voyager, SFX, and Aleph.

From the Tech Blog

- JUNE 11** [Configure Alma with 3M Self Check Machines](#)
ExLibris
- MAY 30** [New APIs in Alma June release](#)
ExLibris
- MAY 30** [Integrate Primo and Aspire Course Management](#)
Paul Newman, Sheffield University
- MAY 17** [New APIs available in Primo 4.5](#)
ExLibris

Top Code & Apps

- [Update a file in an existing Rosetta AIP](#)
CODE ROSETTA C#
- [Alma to Oracle Financials XSL converter](#)
CODE ALMA XSL
- [Primo Search widget](#)
CODE PRIMO JQUERY

Get Help

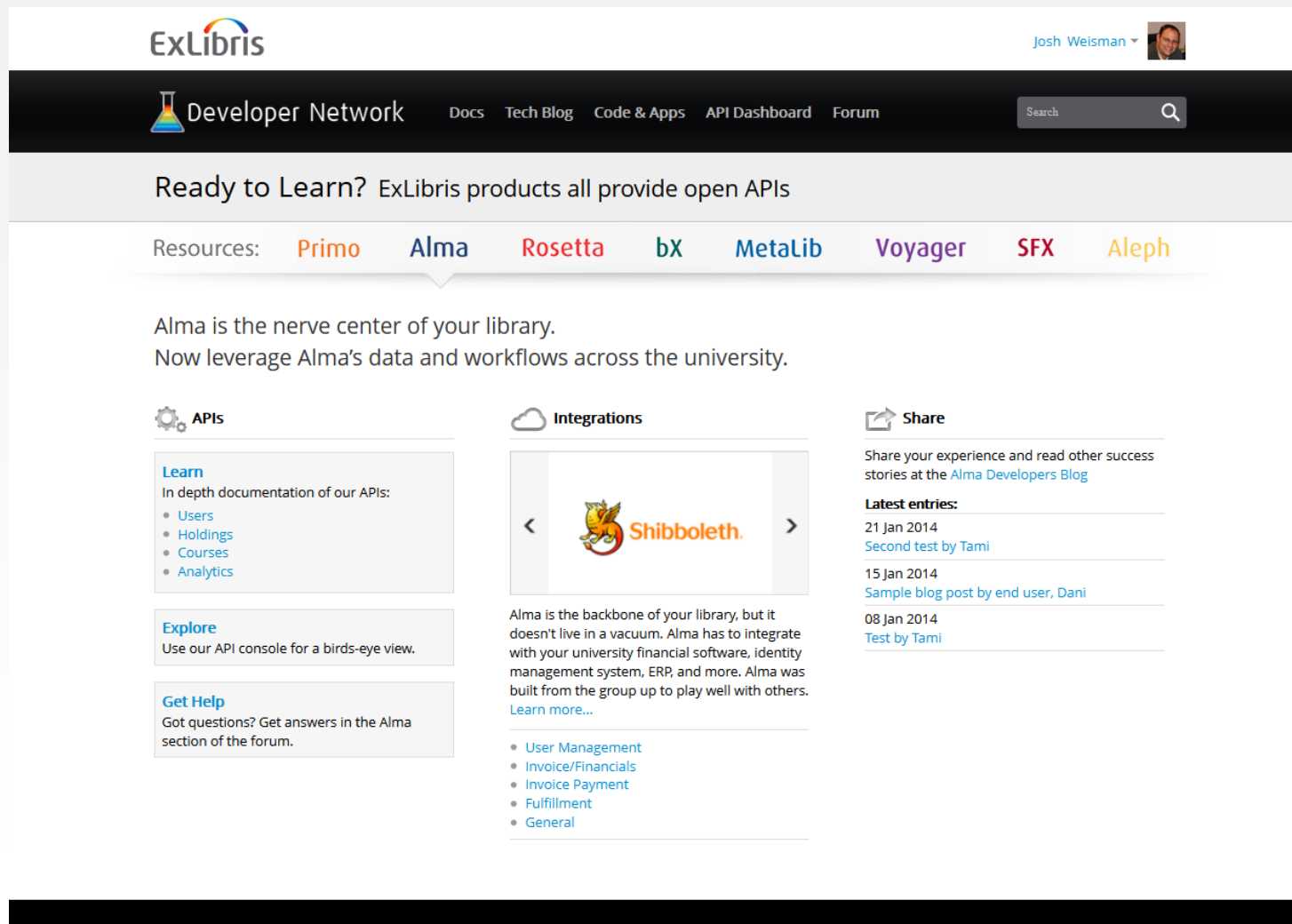
Got Questions?
The ExLibris Developer Network Forum is the place to go. Search the forum for instant help, or ask a question and get help from knowledgeable customers and ExLibris staff.

[Join a discussion](#)

Connect with us



Alma Home Page



The screenshot shows the ExLibris Alma Home Page. At the top left is the ExLibris logo. To the right, the user name 'Josh Weisman' is displayed with a small profile picture. Below the logo is a dark navigation bar with the 'Developer Network' icon and text, and links for 'Docs', 'Tech Blog', 'Code & Apps', 'API Dashboard', and 'Forum'. A search box is located on the right side of this bar. The main content area features a grey banner with the text 'Ready to Learn? ExLibris products all provide open APIs'. Below this is a row of product links: 'Resources: Primo Alma Rosetta bX Metalib Voyager SFX Aleph'. The 'Alma' link is highlighted with a white arrow pointing down. The main content is divided into three columns. The left column is titled 'APIs' and contains three sections: 'Learn' (with links for Users, Holdings, Courses, and Analytics), 'Explore' (with the text 'Use our API console for a birds-eye view.'), and 'Get Help' (with the text 'Got questions? Get answers in the Alma section of the forum.'). The middle column is titled 'Integrations' and features a carousel with a 'Shibboleth' logo. Below the carousel, there is a paragraph of text: 'Alma is the backbone of your library, but it doesn't live in a vacuum. Alma has to integrate with your university financial software, identity management system, ERP, and more. Alma was built from the group up to play well with others. Learn more...' followed by a list of categories: 'User Management', 'Invoice/Financials', 'Invoice Payment', 'Fulfillment', and 'General'. The right column is titled 'Share' and contains the text 'Share your experience and read other success stories at the Alma Developers Blog'. Below this is a 'Latest entries' section with three entries: '21 Jan 2014 Second test by Tami', '15 Jan 2014 Sample blog post by end user, Dani', and '08 Jan 2014 Test by Tami'.

API Documentation

The screenshot shows the ExLibris Developer Network interface. At the top, there's a navigation bar with 'Developer Network', 'Docs', 'Tech Blog', 'Code & Apps', 'API Dashboard', and 'Forum'. A search bar is also present. Below the navigation, a banner reads 'Ready to Learn? ExLibris products all provide open APIs'. A row of product logos includes Primo, Alma, Rosetta, bX, MetaLib, Voyager, SFX, and Aleph. The main content area is titled 'APIs / Users / Users Info / GET Retrieve user details'. On the left, there's a sidebar with a tree view of API categories: Users (User info, Requests, Loans, Fines), Holdings, Courses, and Analytics. Below this are 'Integrations' and 'Share' options. The main content area includes a 'Resource URL' field with the value 'GET /alma/users/1234' and a 'Try it now!' button. It also lists 'URL Parameters', 'Query string Parameters', 'Body Parameters', and 'Possible Error Codes'. A table of error codes is provided, and a 'Related links' section lists 'POST Create a new user' and 'PUT Update a particular user'. A small box on the right indicates 'API Version: v1', 'Response object: User', and 'HTTP Method: POST'.

ExLibris John Smith

Developer Network Docs Tech Blog Code & Apps API Dashboard Forum Search

Ready to Learn? ExLibris products all provide open APIs

Resources: Primo Alma Rosetta bX MetaLib Voyager SFX Aleph

APIs / Users / Users Info / GET Retrieve user details

Resource URL: API Version: v1
Response object: User
HTTP Method: POST

URL Parameters:

Query string Parameters:

Body Parameters:

Possible Error Codes:

This Web service retrieves information related to a given user—user details, blocks, identifiers, addresses, roles, and forth—if the input parameters provide a match.

If the input parameters do not provide a match, an error message is returned, stating the reason why the information cannot be retrieved.

Resource URL
GET /alma/users/1234
[Try it now!](#)

URL Parameters

Parameter	Type	Required	Description
User Identifier	Number	Required	A unique identifier for the user

Query string Parameters

Parameter	Type	Required	Description
Identifier_type	User Identifier	Optional	The type of identifier that is being searched. If this is not provided, all unique identifier types are used. The values that can be used are user_name or any of the values in the User Identifier Type code table.

Body Parameters
None

Possible Error Codes

Code	Message
401650	User identifier is empty.
401651	User not found.
401652	General Error – An error has occurred while processing the request.

Related links

- POST Create a new user
- PUT Update a particular user

Data Dictionary

ExLibris Developer Network

Ready to Learn? ExLibris products all provide open APIs

Resources: [Primo](#) [Alma](#) [Rosetta](#) [bx](#) [MetaLib](#) [Voyager](#) [SFX](#) [Aleph](#)

Integrations / Acquisitions / **Invoice Payment**

APIs

Integrations

- Acquisitions
- Invoice Payment**
- EDI
- EOG
- Resource Management
- Fulfillment
- User Management
- General

Share

Overview

Data Dictionary

Payment Data

Description: Payment data to Export

Field	Type	Description
invoice_list	Invoice List	Invoice list to Export. Includes at least one invoice.

Invoice List

Description: Invoice list to Export. Includes at least one invoice.

Field	Type	Description
invoice	Invoice	Specific invoice to export

Invoice

Description: Specific invoice to export.

Field	Type	Description
invoice_number	String	The invoice number, as appears on the invoice. This may be used to identify the invoice (with vendor_code) during import, if a unique identifier is not supplied.
vendor_code	String	The code of the vendor from which the invoice was issued. This may be used to identify the invoice (with invoice_number) during import, if a unique identifier is not supplied.
vendor_name	String	The name of the vendor from which the invoice was issued.
payment_method	String	Payment method of the invoice.

The valid values for this parameter are controlled by the code table Payment Method code table. These are the currently defined values for the Demo institution:

Code	Description
Check	Payment by check
PO	Purchase Order

Samples

XML

```
1 <payment_data xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
2   xmlns="http://com.exlibris/repository/acq/invoice/xmlbeans">
3   <invoice_list>
4     <invoice>
5       <invoice_line_list>
6         <invoice_line>
7           <fund_info_list>
8             <fund_info>
9               <external_id>external_id</external_id>
10              <amount>
11                <explicit_rate>explicit_rate</explicit_rate>
12              <currency>currency</currency>
13            </fund_info>
14          </invoice_line>
15        </invoice_line_list>
16      </invoice>
17    </invoice_list>
18  </payment_data>
```

API Console

The screenshot displays the ExLibris API Console interface. At the top, the ExLibris logo is on the left, and 'Login | Signup' is on the right. Below the logo is a navigation bar with 'Developer Network' and links for 'Docs', 'Tech Blog', 'Code & Apps', 'API Dashboard', and 'Forum'. A search bar is also present. A banner below the navigation bar reads 'Ready to Learn? ExLibris products all provide open APIs' and lists resources: 'Primo', 'Alma', 'Rosetta', 'bx', 'MetaLib', 'Voyager', 'SFX', and 'Aleph'. The main content area is titled 'Home / Alma / Explore' and features a sidebar with 'APIs' and 'Integrations' options. The central configuration panel includes dropdown menus for 'API' (set to 'Bibs'), 'Resource' (set to '/{mms_id}/holdings/'), and 'Method' (set to 'GET'). An 'API Key' dropdown is set to 'Student Portal', with an 'Authentication (None)' button and an 'Execute Request' button. Below this, tabs for 'Request', 'Query', and 'Response' are visible. The 'Request' tab shows a GET request to 'http://localhost:1801/almaws/v1/bibs/{mms_id}/holdings/' with a parameter 'mms_id' of type 'string' and an 'Add Parameter' button. At the bottom, a table for 'Query string Parameters' is partially visible with columns for 'Parameter', 'Type', 'Required', and 'Description'.



Documentation

- Each product will have its own home page
- Technical documentation for APIs, integrations
- Self-describing APIs
 - WADL-based
- Dictionaries for data objects
 - XSD Based
 - Localized code table value listings
- Interactive API documentation
 - REST API Console
 - Routed to demo instance or to real data

Tech Blog



Josh Weisman ▾



Developer Network

[Docs](#) [Tech Blog](#) [Code & Apps](#) [API Dashboard](#) [Forum](#)

Search



Resources: [Primo](#) [Alma](#) [Rosetta](#) [bX](#) [Metalib](#) [Voyager](#) [SFX](#) [Aleph](#)

Tech Blog

Getting Started with Alma REST APIs

Opher Kutner

ALMA API

The Alma RESTful API supplies an interface that supports direct interactions with other applications via HTTPS. Because the REST API is based on open standards, you may use any web development language to access the API. This post will help you get started developing with Alma APIs. To learn about available resources, authentication and other useful details you will need, please see <http://support.exlibris.co.il/alma/restws/>.

Setting up

A simple way to test your credentials is installing a REST client to your browser, such as RESTClient (Firefox) or Advanced REST client (Chrome). Include the API key and secret provided by your institution's API administrator in every HTTP request you send, as these will serve both as means of authentication and identification which of your institution's environments you are communicating with. The key will

So, for example, a GET request to this URL:

```
http://ldp0001.prod.api.dc04.hosted.exlibrisgroup.com/almaws/v1/partners?limit=1&apikey=17xxeb44d3ee51dd4204aab610c3aae4beef&secret=1da1e9b3b70b40ca9a9d89d0982f8684
```

Would return this result:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<partners total_record_count="3">
  <partner link="/almaws/v1/partners/ILLIAD">
    <partner_details>
      <code>ILLIAD</code>
      <name>Request Article/Chapter/Interlibrary Loan</name>
      <profile_details>
        <profile_type>NCIP</profile_type>
      <ncip_details>
```

Tag Cloud

Course Management Rosetta
Alma Primo API
Code & Apps

Contribute a blog

Manage blog



Knowledge-Centered ExLibris

Code & Apps

- Next generation Code Contributions
- Sample code, full applications
- Ex Libris authored and contributions from the community
- Links to online repositories (Github, Sourceforge, etc.) encouraged

Top Code & Apps

[Update a file in an existing Rosetta AIP](#)

CODE ROSETTA C#

[Alma to Oracle Financials XSL converter](#)

CODE ALMA XSL

[Primo Search widget](#)

CODE PRIMO JQUERY

API Dashboard

The screenshot displays the ExLibris API Dashboard interface. At the top left is the ExLibris logo. The top right shows the user name 'Josh Weisman' with a profile picture. Below this is a navigation bar with 'Developer Network' and links for 'Docs', 'Tech Blog', 'Code & Apps', 'API Dashboard', and 'Forum'. A search bar is also present. The main content area is titled 'Home / Dashboard / Analytics / Ranked Reports'. On the left is a sidebar menu with categories: Organization, Applications, Requests, Organizations, APIs, Analytics (highlighted), User Management, Site Settings, Administration, and My Profile. Under 'Analytics', there are links for 'Ranked Reports', 'API Reports', 'Application Reports', and 'Usage Reports'. The main content area contains the 'Ranked Reports' section with a 'Choose Range' dropdown set to 'Last 7 days', 'From' and 'To' date pickers showing 'Mon, 20 Jan 14' and 'Mon, 27 Jan 14' respectively, and a 'Choose Report' dropdown set to 'Please Choose'. A red 'Generate Reports' button is below these controls. A message box at the bottom of the main content area reads: 'Select a date range, choose a report and click *Generate Reports*.'

Alma APIs

- User Management

- User
- User Cash
- Authentication

- Fulfillment

- Loans
- Requests
- Course

- Resource Management

- Holdings
- Label

- Others

- Analytics

- Users

- User details
- Requests
- Loans
- Resource sharing requests
- Fines

- BIBs

- Holdings
- Items- loans, requests
- Booking availability

- Resource Sharing Partners

- CRUD

- Course Management

- Courses
- Reading Lists
- Citation

Much more coming soon...





Thank You !

