
Migrate From PDS to Primo Authentication Module

- **Product: Primo**
 - **Product Version:** August 2018 +
 - **Relevant for Installation Type:** Multi-Tenant Direct, Dedicated-Direct, Local, TotalCare
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1. Create new authentication profiles in Primo

Please refer to the on-line documents listed below and configure the new authentication module to work with your authentication systems:

SAML:https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Back_Office_Guide/040Primo_User_Authentication/030Using_SAML_for_User_Authentication

CAS:https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Back_Office_Guide/040Primo_User_Authentication/045Using_CAS_for_User_Authentication

LDAP:https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Back_Office_Guide/040Primo_User_Authentication/050Using_LDAP_for_User_Authentication

Ex Libris Identity Service (via Alma): https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Back_Office_Guide/040Primo_User_Authentication/060Using_Alma_for_User_Authentication

Please make sure that the user identifiers returned from SAML/CAS identity providers are the same as being returned to the current PDS authentication module. In the MAP_PRIMARY_IDENTIFIER field of the LDAP authentication profile, please enter the same LDAP user attribute name which is being used by PDS for authorization.

If your Primo uses multiple authentication methods, you can refer to the document below to activate multiple login profiles:

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Back_Office_Guide/040Primo_User_Authentication/020The_Primo_Authentication_Manager#Defining_Parallel_Login_Profiles

If you have a Primo sandbox, we recommend you follow the above documents to configure your sandbox to use the new authentication module first. If the Primo sandbox works with the Alma production server, please refer to the document below to update the Primo Templates mapping table and configure “env_type” parameter:

https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/Primo/Back_Office_Guide/130Mapping_Tables/120Mapping_Table_Reference#Delivery_Subsystem

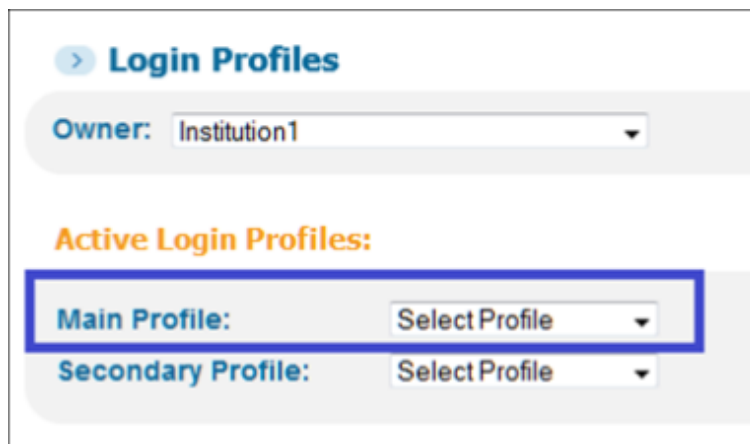
2. Customize new login pages

Once the new authentication profiles are added to Primo, you can follow the document below to customize the login pages:

<https://knowledge.exlibrisgroup.com/...Authentication>

3. Activate and test new authentication profiles

To activate the newly created authentication profile, please select the profiles as the “Main Profile” or “Secondary Profile” on the “Login Profiles” page to replace the old “PDS” authentication profile. Please note that the old “PDS” authentication profile should not be used as a secondary profile with the new profile.



Once the new authentication profile is selected, please deploy the **User Authentication Configuration** option on the Deploy All page (Primo Home > Deploy All).

On the Alma side, please update the “primo_pds_url” and “primo_test_pds_url” parameters as described in the document below:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/050Configuring_General_Alma_Functions/080Configuring_Other_Settings](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/050Configuring_General_Alma_Functions/080Configuring_Other_Settings)

Note: please save the old “primo_pds_url” and “primo_test_pds_url” parameter value somewhere in case a roll-back is needed later.

To roll back to the old PDS module, you can simply select “PDS” as the “Main Profile” (and leave other profile options empty), run the deployment job and change the Alma “primo_pds_url” and “primo_test_pds_url” back.

Also, if you are using a pay-fine link or a resource sharing link, please make sure the links are configured as described in the following articles:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/060Alma-Primo_Integration/040Configuring_the_Primo_Front_End_for_an_Alma_Data_Source/100Direct_Linking_to_the_Resource_Sharing_Request_Form](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/060Alma-Primo_Integration/040Configuring_the_Primo_Front_End_for_an_Alma_Data_Source/100Direct_Linking_to_the_Resource_Sharing_Request_Form)

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/060Alma-Primo_Integration/040Configuring_the_Primo_Front_End_for_an_Alma_Data_Source/070My_Account#Configuring_the_Pay_Fine_Link](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/060Alma-Primo_Integration/040Configuring_the_Primo_Front_End_for_an_Alma_Data_Source/070My_Account#Configuring_the_Pay_Fine_Link)

4. Checklist

- Test the log in function and make sure the user name is displayed at the top-right corner once logged in.
- Test the log out function and make sure the user session is terminated properly.
- As a logged in user, check the e-shelf content including loans, requests, fine/fees, saved items and search queries. Please make sure the same information is displayed as using the PDS login. If not, please roll back the change and open a support case.

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- **Article last edited:** DD-Mmm-YYYY