



# Alma – SIS User Integration Profile

Miiya Holmes - Ex Libris  
Implementation Consultant



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## ❖ Prerequisites

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# Prerequisites

- Roles
  - General System Administrator
- IT Department Deliverables
  - Agreement on Identifier to use for matching (must be in every user record)
  - S/FTP Server, port number, username & password, and directories with full read/write access for Alma
  - Extract user records from your university user management system and format as Alma User XML records
  - Zip Alma User XML files and deliver zip file to S/FTP server



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# Configuring S/FTP

**(Configuration Menu > General > External Systems)**

Step 1. Add S/FTP name to the Allowed S/FTP Connections Table  
(only during Alma implementation)

Step 2. Add the S/FTP details to the S/FTP Definitions Table

Alma Configuration Sandbox

Configuring: Professional Serv

Filter List: Look-up or select

- Acquisitions
- Resources
- Discovery
- Fulfillment
- User Management
- General**
- Analytics

- Relationships
- Define Campuses
- Locations
- Remote Storage
- Work Orders and Departments
- Work Order Types
- Work Order Departments
- External Systems**
- Integration Profiles
- S/FTP definitions
- Allowed Emails
- Allowed S/FTP connections**

# Allowed S/FTP connections:

(Configuration Menu > General > External Systems > Allowed S/FTP Connections)

Only used in

- a) a sandbox environment or
- b) on the Alma production environment for customers who are still in the implementation/testing

Ftp Include List

Table Description: Ftp Include List  
 Customization mode: Entire table needs to be customized

+ Add Row

Enabled	FTP Hostname / IP	FTP Hostname / IP description	Updated By	Last Updated
<input checked="" type="checkbox"/>	ftp.exlibris-usa.com	Ex Libris ftp server	-	-

# Configuration Menu > General > External Systems > S/FTP Definitions

Update S/FTP connection

Definition Type FTP ID -

Context Type Integration

Name \*

Description

Server \* Port \*

Sub-directory Max. Number of Files 1

Min. Number of Files 1 Max. file size 1

Size type MB Allow Navigation True

Ftp Server Type Default FTP Passive Mode

Ftp Server Secured

UserName \* Password \*

1. Enter a name (mandatory) and a description (optional) for the new S/FTP connection.
2. Enter the S/FTP server you added to the allowed S/FTP Connections Table in the mandatory Server field.
3. Enter the port number provided by your IT department.
4. Enter the username and password used to access the ftp server. These should also be provided by your IT department.
5. Click the Save button.



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# Configuration Menu > General Tab > External Systems > Integration Profiles

Integration Profile List Back

1 - 10 of 10   + Add Integration Profile

Integration Type : All

Name	Code	Description	Integration Type	Updated By	Status Date	
1 BURSAR Fines and Fees	BURSAR	-	Bursar	gail.muirhead	2015/09/24	...
2 BX	BX	-	Link Resolver Statistics	System	2016/08/07	...
3 Invoice Payment	ERP	-	Finance	exl_support	2015/09/24	...
4 Main Library Self-Check	MAINLIBSC	-	Self Check	exl_impl	2013/08/07	...
5 OCLC	OCLC	-	OCLC Connexion	exl_impl	2013/08/08	...
6 RFID	RFID	-	RFID	Docteam	2017/07/05	...
7 Salk Lower Level Self-Check	SALKLLSC	-	Self Check	exl_impl	2013/08/07	...
8 Student Information System	SIS	Student Information System	Users	connie.braun	2015/03/09	...
9 Social Authentication	SOCIAL	-	Social/Email Login	exl_impl	2017/06/26	...
10 Z3950	Z3950	-	Z39.50 Server	exl_support	2016/06/01	...

# Integration Profile Wizard

< Integration Profile 1 2 Cancel Next

-

Code -

Integration Type -

Code \* TESTU

Name \* Test Users

Integration Type \* Users

S/FTP Connection Type \* SIS

System (for Ex Libris informational purposes) \* Campus Management

Default

Description

1. Enter a code and name for the profile you are defining.
2. From the **Integration type** drop-down list, select **Users**.
3. From the **S/FTP connection type** drop-down list, select the name of the FTP connection that you previously defined.
4. Indicate the type of SIS with which you are integrating (for Ex Libris' informational purposes). Note that this is mandatory.
5. Click **Next**.

# Integration Profile Wizard (cont.)

IMPORT

Active \*  Active  Inactive

Record Type \*

Input File Path \*

User XSD Version

Section 1 configures the initial user import

Section 2 configures ongoing synchronization

SYNCHRONIZE

Active \*  Active  Inactive

Record Type \*

Match ID Type \*

Synchronization Type  Swap All

Unmatched Record  Add  Reject

Input File Path \*

Schedule

User XSD Version

## IMPORT

Active \*  Active  Inactive

Record Type \* **Public**

Input File Path \* **alma/sis\_load**

User XSD Version **V. 2**

**Active:** Whether the job is active or inactive (mandatory)

**Record Type:** The type of user record to create in Alma (mandatory)

**Input File Path:** A subdirectory of the path specified when creating the secure FTP connection (mandatory)

**User XSD Version:** set to V. 2

## SYNCHRONIZE

Active \*  Active  Inactive

Record Type \*

Match ID Type \*

Synchronization Type  Swap All

Unmatched Record  Add  Reject

Input File Path \*

Schedule

User XSD Version

**Match ID Type:** the identifier with which you want to match existing Alma users (mandatory)

**Synchronization Type: Swap all** means if a field does not exist in the input file, it is deleted from the existing user. The input file must therefore always include all of external user's information, not only the updated fields.

**Unmatched Record:** Whether Alma adds a new user record if it has failed to find a matching record, or rejects the incoming record if no match is found for it.

**Schedule: Not scheduled** means the job runs only when you manually run it. Other scheduling options are also available.

# Running the Synchronize job

SYNCHRONIZE

Active \*  Active  Inactive

Record Type \* **Public**

Match ID Type \* **Primary Identifier**

Synchronization Type  Swap All

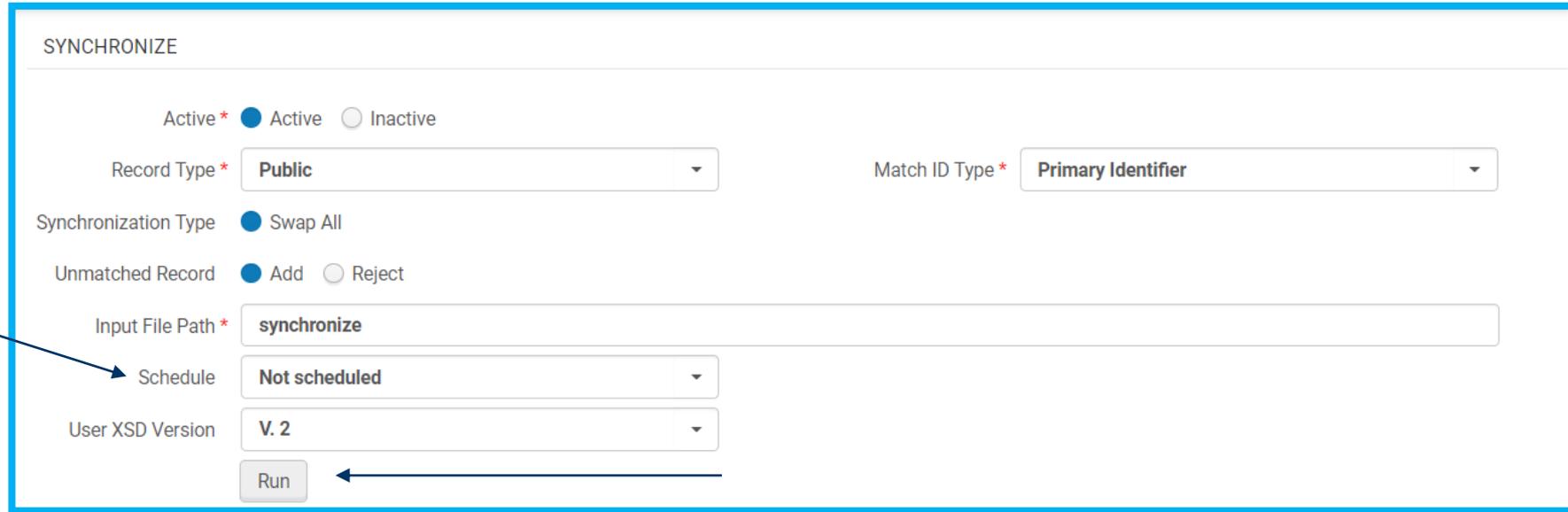
Unmatched Record  Add  Reject

Input File Path \* **synchronize**

Schedule **Not scheduled**

User XSD Version **V. 2**

←



# Patron Import Results



**Completed Successfully**

**Users SYNCHRONIZE using profile Student Information System** 

<b>Process ID</b>	1286844230003746	<b>Total run time</b>	2 Seconds
<b>Started on</b>	2017/08/31 08:19:17 EDT	<b>Finished on</b>	2017/08/31 08:19:20 EDT

[View Alternative Report](#)

**Job Results Summary** 



1	Total records processed	1
2	Total users processed	1
3	Total users rejected	0
4	Total users updated successfully	0
5	Total users created successfully	1

**Job Parameters** 

**Created Users - By Files** 



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# Alma Developer Network URLs

SIS: Overview

<https://developers.exlibrisgroup.com/alma/integrations/user-management/sis>

Alma Developers – Patron Loader

<https://developers.exlibrisgroup.com/alma/integrations/user-management/sis/synch>

Data Dictionary and XML sample

[https://developers.exlibrisgroup.com/alma/apis/xsd/rest\\_users.xsd?tags=SIS](https://developers.exlibrisgroup.com/alma/apis/xsd/rest_users.xsd?tags=SIS)

# Additional Resources

[External Systems – Configuring Integration Profiles](#)

[Configuring S/FTP Connections](#)

[Configuring Allowed S/FTP Connections During Testing](#)

[Alma Integrations with External Systems – Student Information Systems](#)

