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
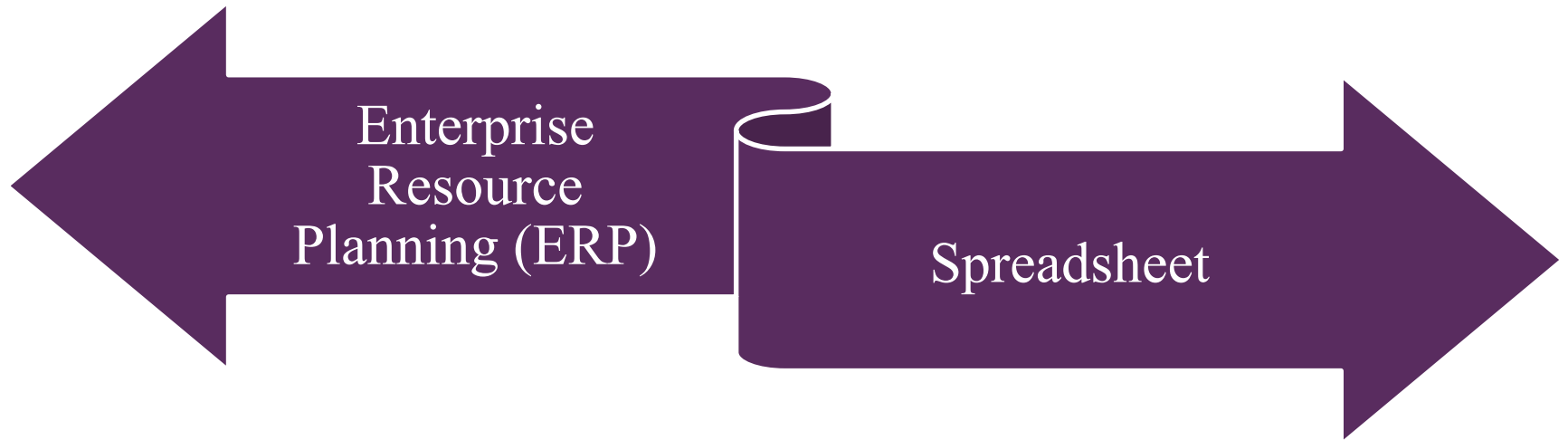
Agenda

- What is SIS?
- Current (Voyager) vs new (Alma) process
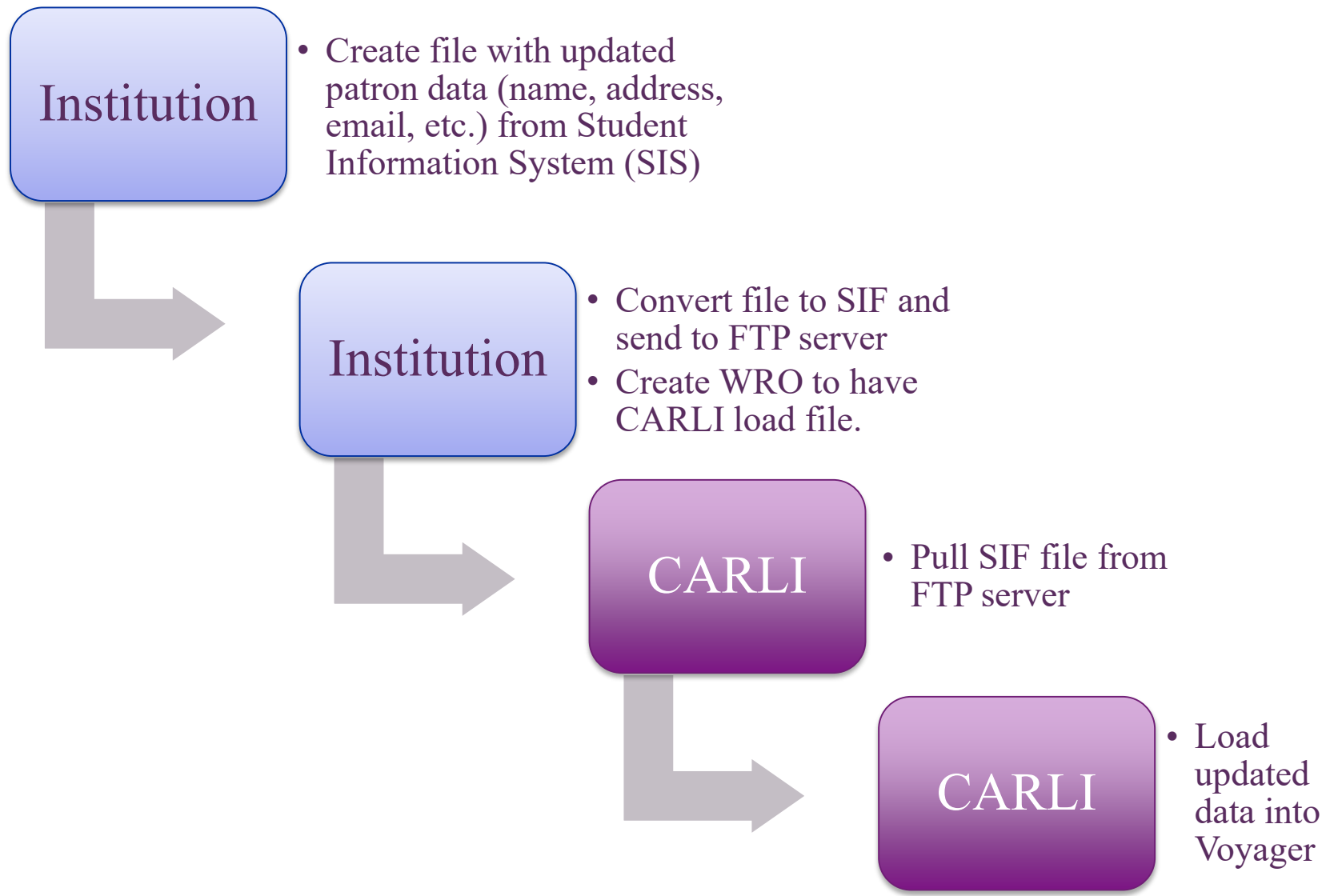- Integration

Student Information System (SIS)

Enterprise Resource Planning (ERP)

Spreadsheet

Either way, the SIS is the authoritative source for student/patron data at your institution

Institution
- Create file with updated patron data (name, address, email, etc.) from Student Information System (SIS)

Institution
- Convert file to SIF and send to FTP server
- Create WRO to have CARLI load file.

CARLI
- Pull SIF file from FTP server

CARLI
- Load updated data into Voyager

ExLibris Alma

Institution
- Create file with updated patron data (name, address, email, etc.) from Student Information System (SIS) and other data sources

Institution
- Convert file to XML and send to FTP server

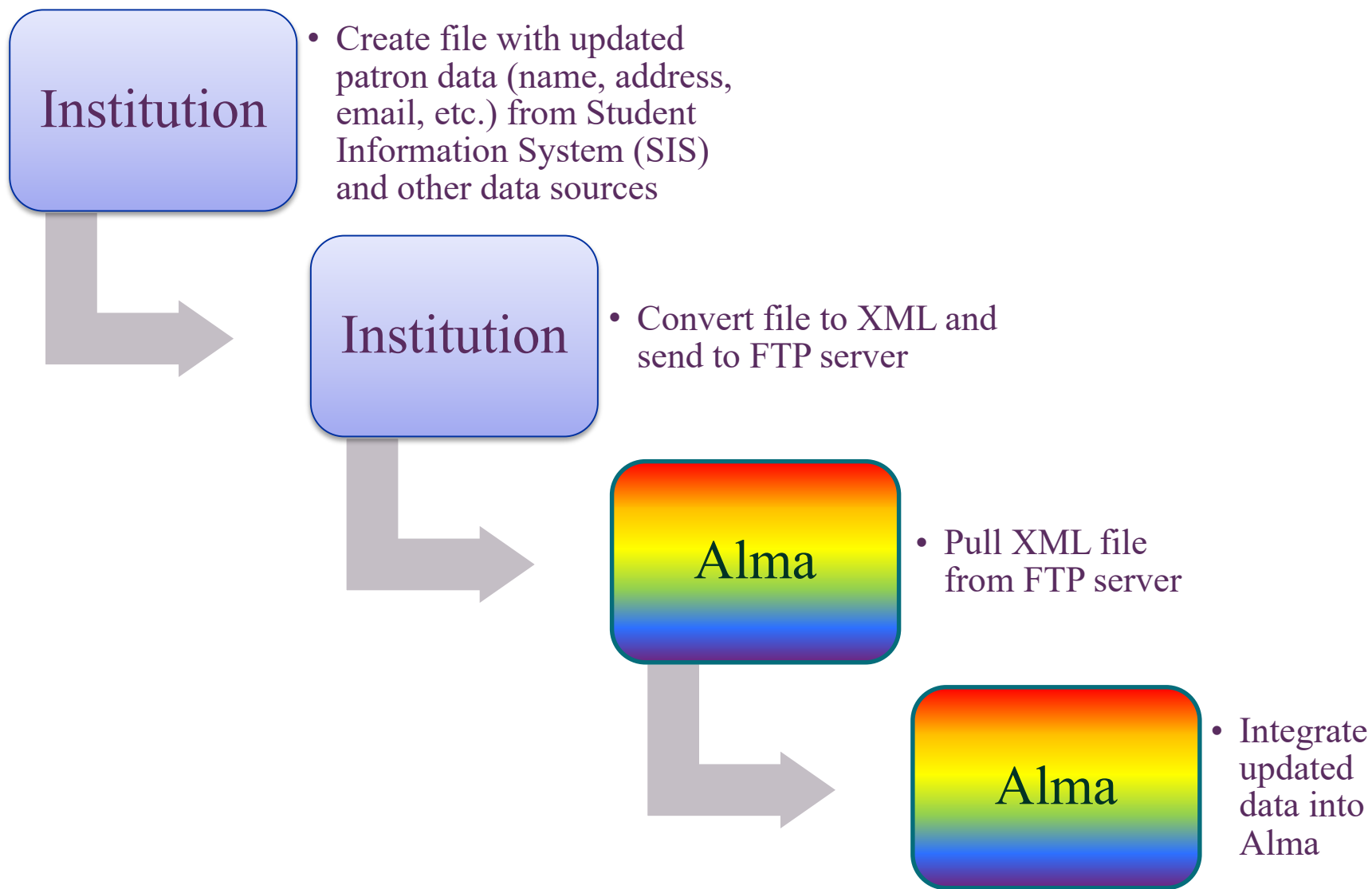**Alma**
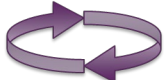- Pull XML file from FTP server

Alma
- Integrate updated data into Alma

Integration Responsibilities

Institution

- Create / Define unique patron identifier
- Set up integration profile in Alma
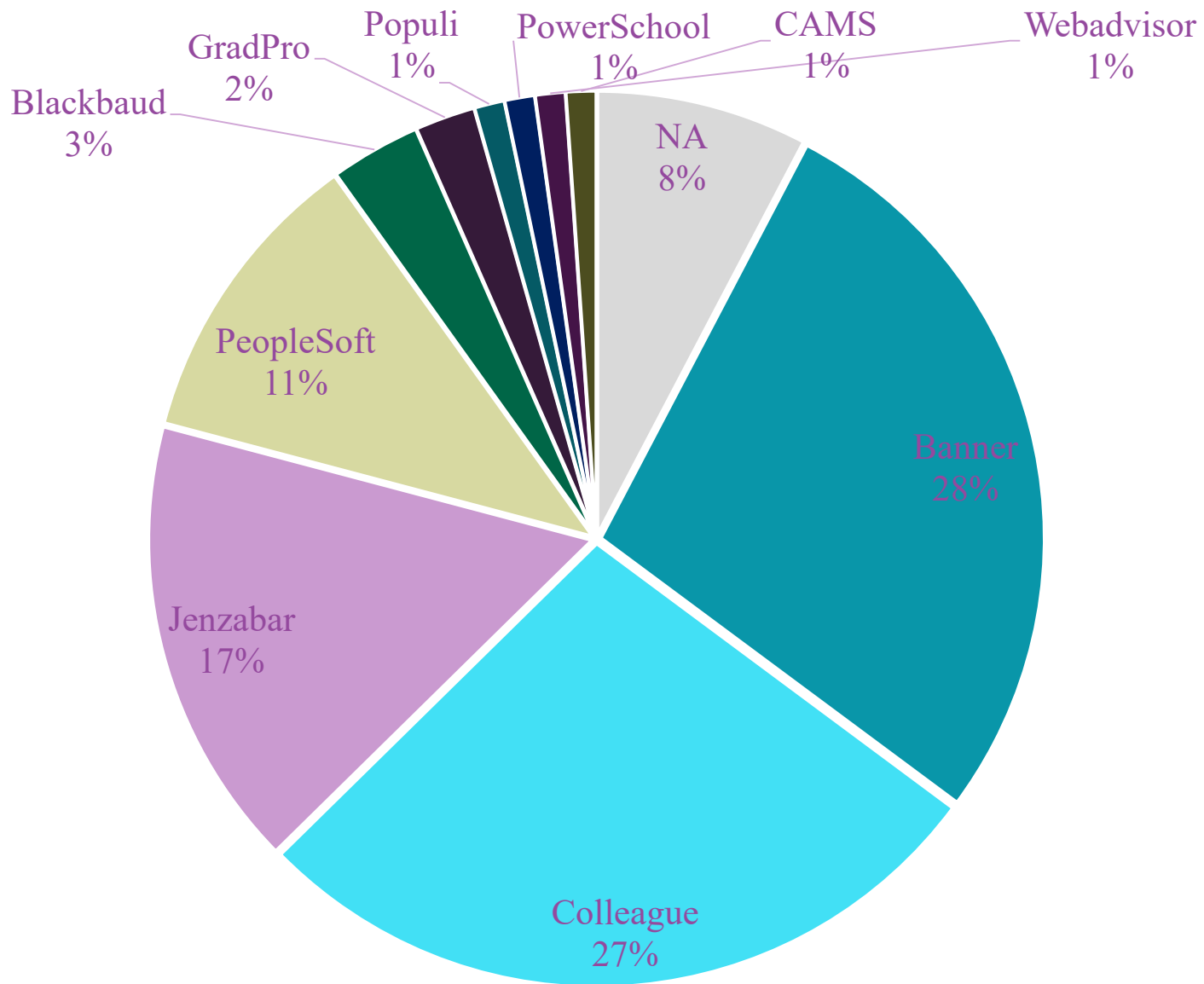- Create and provide the XML file

Ex Libris

- Provide Alma software (SaaS)
- Define XML file format

CARLI

- Provide support to institutions

SIS in use among I-Share members

Pilot

SIS	Pilot Institution Identified
Banner	✓
Colleague	< Your Name Here>
CAMS	✓
Jenzabar	< Your Name Here>
PeopleSoft	✓
Oracle	< Your Name Here>
Blackbaud	< Your Name Here>
Populi	< Your Name Here>
SAP Concur	< Your Name Here>
Webadvisor	< Your Name Here>
AIS	< Your Name Here>
PowerSchool	< Your Name Here>
Grad Pro	< Your Name Here>

Next Steps

- Volunteer to be a pilot institution
- Ensure that CARLI knows about your SIS
  - If you are in the 8% in the pie chart, CARLI will contact you
- CARLI will provide documentation for each SIS
  - Get data requirements from CARLI when available
- 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

- **Last Voyager SIF Loads before production data extract**:
  Early June

Contact

Chris Saunders – CARLI Contact for SIS Integration

support@carli.Illinois.edu

Thank you!

Happy Thanksgiving! Dec 5 is the next Open Office Hours

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You can always contact CARLI at <u>support@carli.Illinois.edu</u>

CARLI
I-Share