SIS Integration Process in Alma

(Patron/User Update)

In Colleague run XCAR. This downloads information for all current employees and students who are registered for the current semester. Enter expiry date (6 years in the future) and purge date (7 years in the future), enter term code, and change “N” to “Y” in the “Proceed” box. Click “Save all”. On the next screen click “Save all” as well. Program will run and when it is finished click “Download” to download the file to your computer. File name can be anything, but must be .zip. Make sure the encoding is UTF-8, not ANSI. Compress (zip) the file by right-clicking on it and choosing “Send to” 🡪 “Compressed (zipped) folder”. This will create a zipped version of the file. Ftp the zipped file to the CARLI files server and put it in the SIS folder which is in the ALMA folder. Site: **files.carli.illinois.edu** ; login: ????? ; password: ??????? ; port: **22**

To manually import SIS information into Alma, go to Configuration 🡪 General tab 🡪 External Systems 🡪 Integration Profiles. Click on “User records update” 🡪 Actions tab and under “Synchronize” click the “Run” button to start the process. You will receive an email notification when the job has finished. To get a report of errors go to (in Alma, not Configuration) Admin 🡪 Monitor Jobs 🡪 History (tab). Click ellipsis (…) on the SIS synch you ran, then “Report”. Click on the “Rejected Users – By Files” section to expand it. Click on the ellipsis (…), then “Preview records”. Click on “export list” at top right to download the report in Excel.

Review the Rejected Users report and if any users have the message “Identifier of type INST\_ID and value XXXXXXXX is already take across institution”, this means that there is more than one user record with the same ID number. Most often this is due to an additional Mass Comm user record for the same person. Alma does not allow more than one user record for the same person (ID number). Delete the record that has User Group “Mass Comm Student”. Library staff will be on the list with the message “User is not external” because their accounts are internal. If there are any others on the list with internal accounts toggle them to external (these could be community patrons who have become students). Nothing can be done about users on the list with the message “Mandatory field is missing”. This means that information such as an email address is missing from their record in Colleague.

When a community patron becomes a student and needs to be changed to a student account

1. Toggle the account type to “external”
2. Change the “User group” to “Student”
3. Update their “Expiration date” and “Purge date”, if necessary or run the SIS integration process again

Term codes:

Fall 2020 20213L  
Winterim 2020 20216W  
Spring 2021 20216L  
Summer I 2021 20221I  
Summer II 2021 20221L