Instructions for Creating SIS Integration Profile and Test Loading a Patron Sync File

These tasks should be performed by a staff member with Alma's General System Administrator role.

A) Set S/FTP profile to be Allowed

If your institution will be using CARLI's secure FTP server for loading SIS files, then these steps have already been completed for you.

1) Log in to your Alma instance.
2) Select the gear icon in the upper right of the Alma welcome screen to enter Alma Configuration.
3) Select the *General* tab and, then find under *External Systems*, select **Allowed S/FTP connections**.
4) The Mapping Table screen will appear, click **+Add row**.
5) Enter the fully qualified FTP server name or IP in the *FTP Hostname / IP*. Use the server address provided by your IT group; or if using CARLI's secure FTP server, then enter **files.carli.illinois.edu**.
6) Enter an *FTP Hostname / IP description* to give it a human-readable description.
7) Select the *Add Row* button.
8) Make sure the sliding button under *Enabled* is active (shifted to the right, with a solid color).
9) Click either the Customize or Save button in the top right of the Mapping Table screen. You will be returned to the configuration menu.

B) Define S/FTP Server to be used

If your institution will be using CARLI's secure FTP server for loading SIS files, then steps 3, 6-14, and 16 have already been completed for you.

1) On the Alma Configuration screen, select the *General* tab on the left side of the screen.
2) Under *External Systems*, locate and select **S/FTP definitions**.
3) On the List of S/FTP Connections screen, click **+Add S/FTP connection**.
4) Enter the *Name* of your ftp server connection. This name will appear in other Alma screens, so it should describe the connection unambiguously. If using CARLI's secure FTP server, enter **CARLI Secure FTP Server**.
5) Provide a *Description* of the server that will be helpful to others who view the configuration screen (e.g., server address, IT contacts, etc.)
6) In the *Server* field, put the fully qualified server name. Use the server address provided by your IT group
7) In the *Port* field, put in **22**.
8) In the *Sub-directory* field, specify the directory that the s/ftp connection should open, if different from the home directory allowed for the account. You may leave this blank if the s/ftp connection should begin in your home directory.
9) Increase the *Max. Number of Files* to **1000**.

10) Leave the *Min Number of Files* set at **1**.
11) Increase the *Max. file size* to **2000**.
12) Make sure that *Size type* is set as **MB**.
13) Set *Allow Navigation* to **True**.
14) Set *FTP Server Type* to **Default**.
15) Set the *FTP Passive Mode* according to your IT group's instructions; if using CARLI's secure ftp server, make sure *FTP Passive Mode* is **checked**.
16) Set *FTP Server Secured* as **checked**.
17) Select whether the connection will use **Username/password authentication** or **Key authentication** based on your IT group's instructions. If using CARLI's secure ftp server, select **Username/password authentication**.
    a. If using **Username/password authentication**, enter your *UserName* and *Password* for the connection. These will be the server credentials provided to you by your IT group, if using a local server; or by CARLI, if you will be using CARLI's secure FTP server.
    b. If using **Key authentication**, enter your UserName as provided by your IT group; then copy the *Public Key*; work with your IT group to incorporate this into authentication to your local server.
18) Select **Test FTP** in the upper right of the Update S/FTP Connection screen. If you have the correct permissions and sub-directory for your selected FTP server, the test should succeed. If the test fails, check your information and adjust the profile settings.
19) Select the **Save** button in the upper right of the Update S/FTP Connection screen.

C) Create SIS Integration Profile(s)

1) Log into your Alma instance.
2) Select the gear icon in the upper right of the Alma welcome screen to enter Alma Configuration.
3) On the Configuration screen, select the **General** tab on the left side of the screen.
4) Under *External Systems*, locate and select **Integration Profiles**.
5) On the Integration Profile List screen, select **+Add Integration Profile**.
6) Enter a *Code* which will be a unique identifier for the integration profile. Ex Libris and CARLI staff may use this code later in troubleshooting integrations.
7) Enter the *Name* for this integration; the name will appear on the Integration Profile List, in the Monitor Jobs list, and in emailed reports.
8) As *Integration Type*, select **Users** from the drop down.
9) After the Integration Profile screen refreshes, select your *S/FTP Connection Type*, as created above, from the drop down list. For example, if you're using CARLI's secure ftp, you would select **CARLI Secure FTP Server**.
10) In the *System* field, select the student information system for this particular integration from the drop down lost; select **Other** if your system is not listed.
11) Decide if you want this profile to be the default by using the checkbox.
12) Write a description for this profile if you wish

13) Select the *Next* button in the upper right of the Integration Profile screen.
14) On the second Integration Profile screen, you will enter the details for the specific type of SIS integration you are creating. You will use only one type per integration. Mark the choice you will use in this integration as **Active**; other types should remain inactive.
    a. *IMPORT* only adds users to Alma. Generally, this integration would be used to add sets of users who are not routinely updated in another system.
        i. Set *Record Type* as **Public**.
        ii. Enter the sub-directory on your FTP server where user import files will be placed. If placed in the home directory, you may leave this blank. If using CARLI's secure ftp server, enter **SIS/import**.
        iii. Keep the *User XSD Version* setting of **V. 2**.
    b. *SYNCHRONIZE* will add new users to Alma and will update users already added previously to Alma with current information from the SIS (provided data are included in the user files).
        i. Set *Record Type* as **Public**.
        ii. Set *Match ID Type* as **Primary Identifier**.
        iii. Keep the *Synchronization Type* setting of **Swap All**.
        iv. Keep the *Unmatched Record* setting of **Add**.
        v. Enter the sub-directory on your FTP server where user import files will be placed. If placed in the home directory, you may leave this blank. If using CARLI's secure ftp server, enter **SIS/synchronize**.
        vi. For your initial testing period, keep the *Schedule* setting of **Not Scheduled**. (You may change this value later.)
        vii. Keep the *User XSD Version* setting of **V. 2**.
    c. *ONLINE IMPORT* gets user information from an SIS using an external REST API, typically for one user at a time. If using this approach, enter the URL and credentials provided by your IT group.
15) Click the **Save** button in the upper right of the Integration Profile screen.

Repeat the above steps for each separate SIS that you are integrating, or for different methods of adding users.

Test Load a Patron Data File

1) Prepare a user XML file using the format specified at https://www.carli.illinois.edu/products-services/i-share/alma/user_mandatory_fields. The file name should include "patron" in the name; other details such as date/time and user groups included may be useful in the name as well.
2) Create a zipped version of the user XML file.
3) Connect to your designated ftp server.
4) Transfer the zipped user XML file into the path specified in the S/FTP server definition. For example, if using CARLI's secure ftp server for a user synchronization, the path would be alma/SIS/synchronize.
5) Log into your Alma instance.
6) Select the gear icon in the upper right of the Alma welcome screen to enter Alma Configuration.
7) On the Configuration screen, select the *General* tab on the left side of the screen.
8) Under *External Systems*, locate and select **Integration Profiles**.
9) Select the integration profile you just created above for the type of load needed (i.e., import or synchronize).
10) Select the **Actions** tab.
11) If testing an *IMPORT* integration (i.e., you're trying to add users not yet in Alma):
    a. Verify that *Record Type* and *Input File Path* are correct.
    b. Select the **Run** button.
    c. Watch for Alma to respond with a notification that the job has been submitted.
12) If testing a *SYNCHRONIZE* integration (i.e., your user file contains data on users in Alma as well as new users):
    a. Verify that *Record Type*, *Match ID* Type, *Synchronization* Type, *Unmatched Record*, and *Input File Path* settings are correct.
    b. If you are testing only the synchronization process, leave *Schedule* as **Not Scheduled**; if you are also testing whether the synchronization process runs on schedule, set a time for the job to run.
    c. Select the **Run** button.
    d. Watch for Alma to respond with a notification that the job has been submitted.
13) Select the **Back to Alma** button at the very top left of the screen.
14) Select the **Admin** menu, then select **Monitor Jobs**.
15) You will see a new entry in either the *Running Jobs* tab or the *History* tab.
16) Locate the job that corresponds to the time of the one you just ran.
17) Click it to see the detail of what is happening/happened.
18) If the job was unsuccessful, look in the report to see what went wrong.
19) If the job was successful, then it should detail the changes that it made to Alma.
20) If you have enabled Allowed Emails in your configuration, you will also receive an emailed report about the completion of the SIS integration job. This message will have a Subject line that describes the type of load (i.e., import or synchronize), the name of the integration profile used, and a statement on completion.
    For example: Users IMPORT using profile TEST SIS Integration Import

Alternately, job history may be reviewed from the list of integration profiles. Select the *Row Actions* menu (the … button) on the right of the list, then select Job History. Then on the list of jobs, select the *Row Actions* menu for the job you ran, and select View.