Alma Administration – General
Integration Profiles

You can integrate Alma with external systems, such as your Student Information System, Enterprise Resource Planning system, and vendor systems. This keeps your Alma data in synch with the rest of your systems.

In this session, we'll learn how to manage the integration profiles which govern these integrations. We'll look at some example integration profiles; and we'll visit our Developer Network where you can find technical specs on data transition between Alma other systems.

To manage your integration profiles, go to Alma Configuration > General > External Systems: Integration Profiles. Here you can view and edit all existing integration profiles and add new ones. Each integration profile specifies a job that can run in Alma to handle the integration. For each profile, you can see its unique Name and Code, and the Integration Type. Under row actions, you can Edit an integration profile, view previous runs under Job History, or Delete the integration profile. You can filter this list by the integration type. For a complete list of all the integration profile types and their descriptions, see the External Systems document in the Knowledge Center.

Prominent integrations include:

* Bursar – to synchronize fines and fees with your bursar's office.
* Finance – to synchronize invoices, orders, and funds with your ERP.
* LDAP – to configure Alma staff user authentication.
* Resolver Proxy – to configure the proxy server that authorizes full text access from content providers.
* SAML – to allow single sign on.
* Self Check – machines which allow patrons to check library items on their own.
* Upload Electronic Holdings – to set up the import of electronic holdings from supported content providers.
* And Users – to synchronize Alma users with your SIS.

Let's, for example, filter to see only integration profiles of type Users.

To edit an integration profile, click on its name.

In the General tab you can edit the identifying details of the integration, and importantly, the S/FTP Connection Type, which is the server for transferring files between the systems.

In the Actions tab, you can configure the specific actions for Integrations of this type. Our Users integration governs how and when we transfer user information between Alma and our SIS. In the IMPORT section, you can Import new users from the SIS by configuring the relevant parameters and clicking Run. This option is run manually, not scheduled. In the SYNCHRONIZE section, you can update existing users, matched by the ID of your choice. Matched user records are swapped, meaning they are overwritten in Alma, and you can decide whether to Add or Reject unmatched records. You can set up a Schedule for this job to run Every 6 hours, weekly, daily, or to be Not scheduled at all. You can learn about the other options of Users integration in the Student Information Systems document in the Knowledge Center. When done editing your integration, click Save.

Now let's see how to add a new integration profile. Click Add Integration Profile. Select the Integration type, for example, Upload Electronic Holdings. Give the profile a unique Code. For the Upload Electronic Holdings integration, select one of the available providers, enter an optional Description and click Next.

In the second step of the wizard, make sure the profile is Active, and enter the parameters unique to this integration; for example, the Ebook-Central site ID, the Vendor, and the PO line owner library in your institution. You can run the import now, if you wish, or Schedule it to run later. When done, click Save.

Your new integration profile has been created, and if Active, it will run according to schedule.

Finally, for technical information related to data transfer between Alma and other systems, such as input and output file formats, head over to our Developer Network; under developers.exlibrisgroup.com. Go to Alma > Standards & Integrations.

Here you can learn about the industry standards supported by Alma; view training videos about specific integration types; find technical specifications for each integration type; and find information about your Alma Domain Name required to access Alma.

You now know how to find all the resources you need to set up Alma integrations with external systems.

Thanks for joining!