

**IGeLU  
2023  
LEUVEN**

11-14TH SEPTEMBER

DEVELOPERS' DAY

**Adding Library Control of**  **Business Logic**  
to Alma User and Esploro Researcher Processing

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# Overview



# Why?

- ▶ How fast does your IT respond?
- ▶ Need a tiny change immediately?
- ▶ Want to nail down requirements (before talking to IT?)
- ▶ Examples
  - Change email type (school > mail)
  - Add country code to phone number
  - Block specific data from loading, e.g., certain departments
  - Handle empty address/line1 error



# API vs FTP

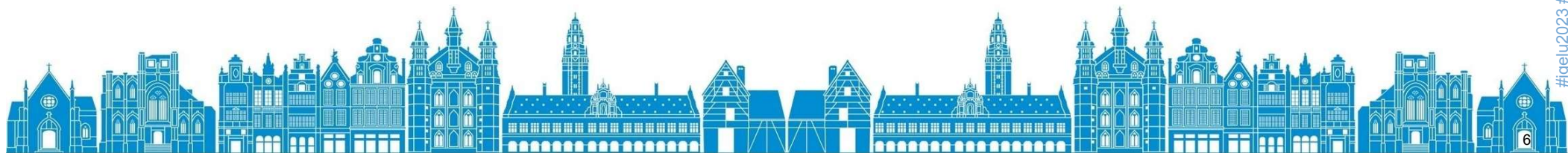
Comparison	API	FTP
Customer use	“very rarely”	most common
Interactions	each user is a call	single file load
XSL conversion in Alma	not available	available
Scripting *	more	less
Overwrites internal content *	yes	no
Error capture in Alma admin	no	yes
Recommended by Ex Libris	no	yes

- ▶ Some organizations use weekly FTP with daily/hourly API updates (to minimize API calls?)
- ▶ If organization struggles to output a user update delta, then FTP is particularly recommended

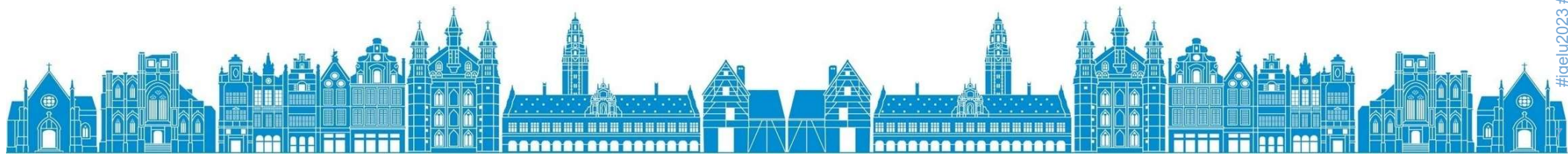


# API Scripting Needs \*

- ▶ Requires a check if a user exists because update and create are different PUTs
- ▶ Overwriting of notes and contacts marked as internal is a known issue. Can be avoided by checking if user exists and, if so, merging the incoming record with existing (limited list of protected fields documented in API)
- ▶ Error capture must be scripted (FTP records common errors in Alma interface)

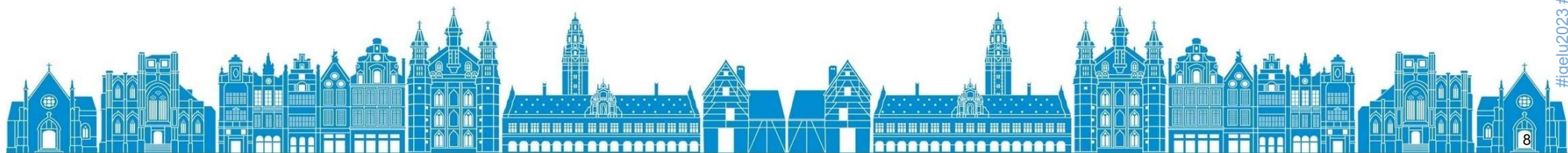


# XSL Converter



# About

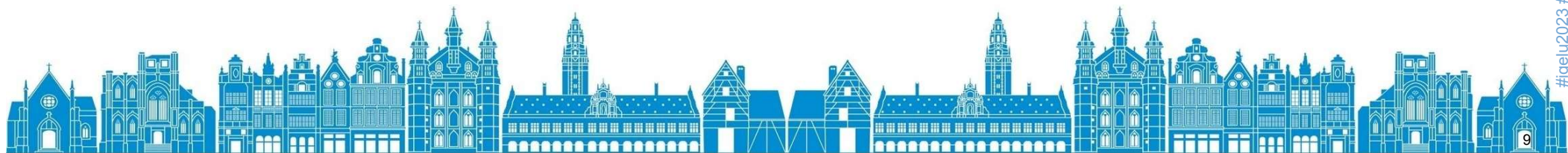
- ▶ Alma > Configuration > General > External systems > Integration XSL Converters
- ▶ Added in July 2020, opened to all users in November 2020
- ▶ Remember: ONLY available via Integration Profiles > SIS process





# Feature : Community Zone Contribution

- ▶ Alma > Configuration > General > External systems > Integration XSL Converters > Community
- ▶ Previously only *Aleph>Alma XSL Converter* available, mentioned in documentation
- ▶ Contributed *Generic Alma User and Esploro Researcher Converter*
  - Goal = no changes to existing input file (output exactly what was input as step 1 in local development)



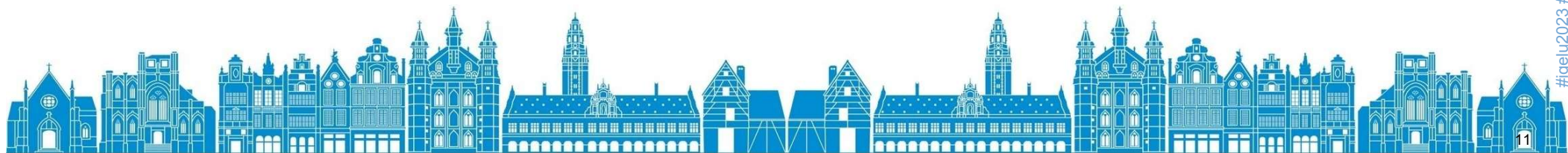
# Feature : Version Control

- ▶ Before version change, update existing converter by adding “OLD” at start of file name – changes file name in integration
- ▶ Upload new file with date stamp + description of changes
- ▶ Select new converter in profile



# Feature : Test Against Sample File

- ▶ Alma Configuration > General > External Systems > Integration XSL Converters > select converter > Edit > Data Samples tab > Upload sample (XML) file



# Resources



# Additional Documentation

- ▶ Ex Libris documentation
  - [User management in Alma](#)
  - [SIS integration](#)
- ▶ Developers Network > XSDs (Data Dictionaries)
  - [Users \(API\)](#)
  - [Researcher \(API\)](#)
- ▶ Related
  - [CARLI SIS - Student Information Systems Specific Patron Extract Resources](#)
  - [Ex Libris Alma CSV User Load \(github\)](#)
  - [External user data: behavior of SIS synchronization and API \(blog post\)](#)



**Thank You**

**Questions?**

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