CSU Libraries ULMS PeopleSoft User Data Requirements

# Project Goal

The implementation of a Unified Library Management System across the 23 campuses provides the opportunity to create a much more efficient transfer of SIS user information into library systems. By centralizing and standardizing this process, the CSU will greatly reduce the time and resource requirements across libraries and campus-level PeopleSoft teams. This will lead to much improved management of the data transfer processes.

# Current PeopleSoft Data Export and Import Process

At present, there are a variety of methods by which each of the 23 campus libraries brings user account information from PeopleSoft into their Integrated Library Systems. A survey of the processes utilized by the campus libraries found the majority are not automated and many require post-export transformation. In many cases, each campus is repeating the same process with local variations in export method, timing, and other parameters. (see Appendix A: Current PeopleSoft Data Transfer Process)

# PeopleSoft User Data – Required Fields

The campus libraries survey found that with the exception of two campuses, all libraries that utilize PeopleSoft data for user accounts require the same set of user data fields. The data fields are listed in the table below. This common set of fields makes it a much simpler to consolidate the duplicative campus-level processes into one central transfer at the systemwide level.

|  |  |
| --- | --- |
| **Fields** | **Exception** |
| First and Last Name |  |
| Middle NameEmail Address |  |
| User Type |  |
| UserID (campus network / login username - required for Shibboleth) |  |
| StudentID#/EmployeeID# |  |
| Barcode |  |
| Expiration Date |  |
| Mobile Phone |  |
| Other Phone Number |  |
| Department (if Faculty/Staff) |  |
| Department / Major (Students) |  |
| Home Address | Long Beach |
| Campus Address | Northridge |

Note: Moss Landing and San Diego are not utilizing PeopleSoft data and are not included in the above.

# Data Export Process Parameters

Based on the Ex Libris data specifications and process requirements provided by the campus libraries, we have compiled a set of export process parameters. These parameters include the scheduling, data transformations, and file structure. The parameters are grouped below by type.

## Exported File Content Structure and File Format

* For the two exception campuses above, exclude fields as specified.
* Separate extracts for students and employees.
* An XSD data dictionary is available at <https://developers.exlibrisgroup.com/alma/apis/xsd/rest_user.xsd>. The required file format for the PeopleSoft exports is described below.

The input file containing external users information must be in XML format, contained within a .zip file.

IMPORTANT: It is recommended to have one zip file, containing a consolidated XML file. Note that there is a maximum limit of 50 XML files in one zip file and a maximum of 20 zip files for each import/synchronization.

Note that the maximum size for a zip file is 4 GB.

In order to give better performance, we recommend to include only users which have changed (and not all the users in the SIS system).

If you do send all the users from the SIS system, Alma will check and update only users which have change. Therefore we recommend to update fields only when required, and not, for example, update the Modification date of all the users.

Users which were not modified will not be handled by Alma, hence their entire information will remain the same.

The zip file should be placed on a secure FTP server, as defined in the integration profile. After the file is handled by Alma, its name is changed to <filename>.zip.old.

NOTE: You can create sample user files from existing users to assist you in accurately creating the user file(s) that you want to upload. See the Create Sample File option in the Student Information Systems section of the Alma Integrations with External Systems Guide.

Alma does not support a situation in which a user appears more than once in a single import/synchronization.

(Available on https://developers.exlibrisgroup.com/alma/integrations/user-management/sis/synch)

## Export Schedule

* Export new, changed, and deleted user records on daily basis.

## User Type and Hierarchy

Only one row per employee/student because unique ID cannot be used for multiple accounts in Alma. Each employee/student can only be assigned a single user type/group. Utilize hierarchy shown below to determine which type/group is assigned to employee/student.

*Hierarchy of Roles*

Faculty
Staff
Administrator
Visiting Scholar
Teaching Associate (do TAs and GAs have differing identifiers in PeopleSoft?)
Faculty/Staff Retired (can these be separated?)
Graduate/Doctoral
Undergraduate
Extended Education/Open University
Special Programs

## Expiration Dates

* For employees, set expiration date as to termination/separation date, otherwise leave blank
* For students, calculate based on last date of following term plus a predetermined number of additional days. ULMS Team is waiting on a libraries task force that will submit a recommendation for the number of additional days. Can summer terms would be considered part of the term immediately preceding it?
* When a student withdraws from classes or graduates, expiration date is updated to reflect last date of enrollment.