



The Future of Alma Patron Loading

Michael Kanning
GIL/GALILEO Support

How it Works - Currently

1. Your institution's Banner runs a job that outputs a Voyager SIF file
2. That file is transferred, either by library staff or an automated process, to the GIL FTP
3. GIL scripts translate SIF format into Alma User XML
4. Alma ingests XML and creates or updates patrons





Known Issues

- Credential Management - onboarding new staff, distributing GIL FTP logins
- Cumbersome expiration date management
- At some institutions, faculty and staff are not in Banner
- Banner job mysteriously determining faculty/staff/student status
- Continued use of Voyager SIF format



Related Systems

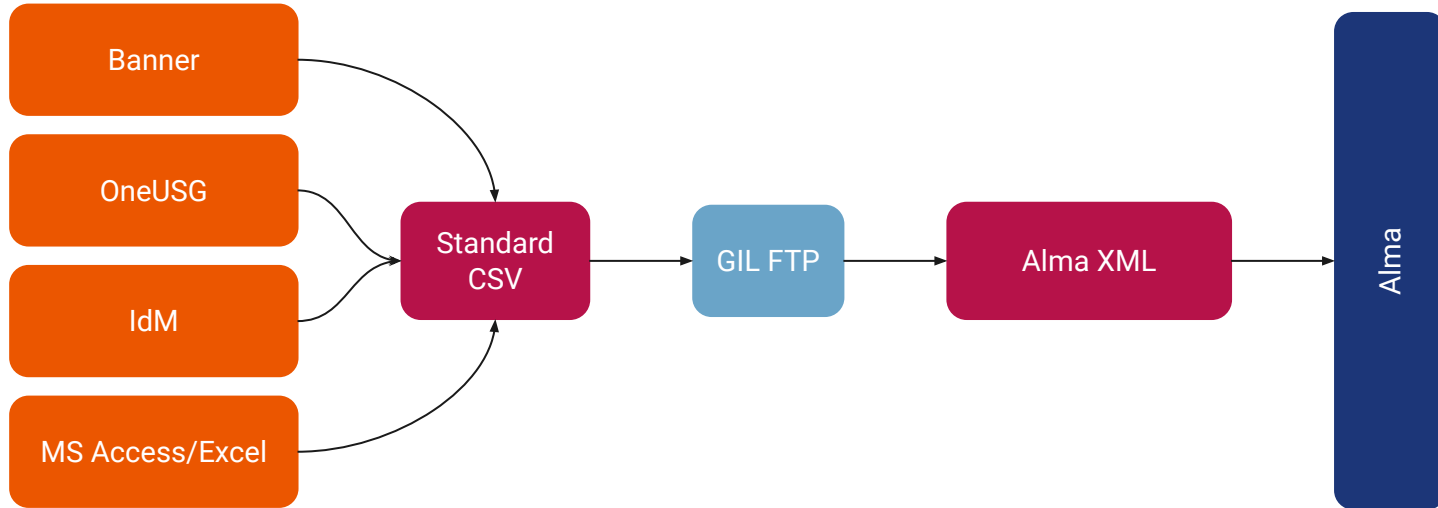
- Banner
- OneUSG aka PeopleSoft
- Identity Management (IdM) - usually the canonical user store



Moving Towards a Sustainable, Extensible Future

- Support multiple different sources
 - a. Banner
 - b. OneUSG
 - c. IdM
 - d. Whatever they think of next
- Utilize a consistent, standardized input format
- Establish a standard schema for minimally acceptable patron information

New Process, Hypothetically





How Can You Help?

- Send feedback on current patron loading process
- Make use of automated transfers if you don't already
- Join ad hoc committee on the set of minimally acceptable patron information
- When GIL is ready, make use of our standardized input format



“Minimally Acceptable Patron Information”

- Alma supports the storage of a tremendous amount of patron info, what do our libraries actually need to support the day-to-day functionality of the library? In this case, perhaps less is more?
- Less patron data is...
 - Better for information security - less patron data is at risk
 - Better for patron privacy - less info to link or be subpoenaed
 - Better for libraries staff - less information to maintain, update, be contradictory or misleading
 - Better for working with USG - less info will make it easier to build connectors to Banner, OneUSG, etc.
 - Better for GIL support - less information to worry about in the Patron Loading process :)
- But what if we can't agree? I need field x to support y at my library.
 - The **smallest** set of **common** fields



What Might This Look Like?

1. Unique Identifier
2. First Name
3. Middle Name
4. Last Name
5. Email Address
6. Patron Type*

Question or Comments
mak@uga.edu

docs:

<https://sites.google.com/view/g3almatraining/patron-loads>