

SIF Setup Guide



Alexandria information and instructions also apply to Textbook Tracker.



Preferences > SIS Integration > SIF > SIF Settings



COMPanion will be discontinuing SIF support as of version Alex 22.1 in Summer 2022. [Contact our Sales Team](#) to learn more about GG4L!

To connect Alexandria to a ZIS server, follow the steps explained in these sections.

Connection

1. Select the appropriate Communication Method. Although Use Pull Mode is selected by default, the Push/Pull mode must match the settings on the ZIS.
2. Set the Registered Version (e.g. 1.5r1, 2.0r1, or 2.3) you are running. This setting must also match the settings on the ZIS.
3. Configure your ZIS Address. This address needs to be exact. One of the most common problems that SIF operators experience is being unable to communicate with the ZIS because of an incorrect URL in this field. Please note that the port contained at the end of the address is 443, a secured port; most people run SIF with encryption.
4. If you are running SIF using encryption (i.e. over a secure port) with Push Mode, then public and private certificates must be specified. The location of the public and private certificates can be configured in Alexandria's Web Administration settings and may have already been specified; COMPanion does not supply this certification.
5. At this point you are ready to check the Enable SIF Communications box to start the SIF service. This automatically causes the following things to happen: The SIF_Registration command is sent. The SIF_Provision command is sent. The list of schools provided by the ZIS is requested; this populates the Site List in the Message Handling tab.
6. At this point, you can SIF Ping the ZIS from the Actions menu. Keep in mind that this isn't a true "ping"—Alexandria sends a message to the ZIS, it is queued up and should respond within a minute or two.
7. If the "ping" is successful, the ZIS then sends an acknowledgement that confirms the ping was received from Alexandria.

Message Handling

The ZIS broadcasts messages according to its configuration. If there is nothing to restrict what gets sent to a particular SIF Agent, then all SIF Agents will receive all messages. Although this is by design, you are able to filter the messages handled by Alexandria SIF Agents using the Message Handling tab.

The Chosen Sites list is used to filter events and requests (some of which that may be intended for other schools in the same SIF Zone) that occur during normal operation. These messages (for example, StudentSchoolEnrollment or StaffAssignment requests) are filtered by SchoolRefId; filtering is absolutely essential for those in a Centralized Catalog or Controller environment.

Further, patron information cannot be imported into Alexandria until the Chosen Sites list has been populated. This list ensures that only the patrons intended for your schools are imported via the SIF Agent.

1. Click **Site List** to open the **Add Site List** roll-down, which contains a list of all the registered and available sites in your specified SIF Zone.
 - If you do not see the schools in the Add Site List roll-down, click Refresh to resend the request and refresh the Site List. Due to the nature of SIF, this may take a few minutes (or a few days).
 - If you don't manually refresh the Site List, an automatic attempt is made once each day.
 - If you still do not see your schools, revisit Step #8 and make sure that you can still SIF Ping the ZIS and reregister the SIF Agent.
2. Once the schools in your SIF Zone start to appear in the **Add Site List** roll-down, select your schools from the list and click **Add**. This will move your selected schools from the Site List to the Chosen Sites list.
 - The Chosen Sites list contains all the schools for which this SIF Agent will accept events and requests, even if they are not being synchronized immediately.
3. Next, check the **Include Students** or **Include Staff** boxes, if they apply.
 - Checking the Include Students box means that a StudentSchoolEnrollment request will be made for all the students belonging to the schools in your Chosen Sites list. Only responses with the TimeFrame of Current will be included. If an optional TimeFrame of Future is also included, they will be requested and processed (if the EntryDate element is less than—or equal to—the date specified).
 - Checking the Include Staff box means that staff for the entire school year will be requested from schools in the Chosen Sites list; the school year is determined using information found in the Advance Grade After field of the Grade Table preferences. By default, agents using SIF version 1.5r1 (and greater) use the StaffAssignment object to request staff for schools in the Chosen Sites list. If StaffAssignment is not available, then all StaffPersonal objects will be requested and other filtering must be used.

Message Viewer

To clear the dates that patron records were last changed or updated via SIF, go to **Message Viewer tab > Actions menu > Clear All Patron SIF Dates** (optional).

Although this should not normally be used, you can select **Clear All Patron Reflds** to clear all StudentPersonal and StaffPersonal Reflds used to match existing patrons; object types will also be cleared as well as the dates that patron records were last updated via SIF. All incoming and outgoing messages in the queue will be deleted and the SIF Agent will be restarted. Under normal circumstances, this option should never be used; however, there are times when it's necessary to perform this procedure before synchronization at the beginning of the school year.

Message Mapping

The Message Mapping tab allows you to specify the location (i.e. XML locations in SIF Messages) of every field that is supported by Alexandria's SIF Agent. Most of the Message Mapping fields have default values that can be modified to customize the import to your exact specifications; the default values in these fields change dynamically if your Registered Version of SIF is adjusted in the Connection tab.

An example of the format for the mapped XML (or whatever is used) will be something like

```
object::xmla/xmlb/... or object::xmla/xmlb='ABC' /...
```

The object mapping fields in the Student, Staff, and Other subtabs allows you to specify where in the SIF Message XML to look for the information you want imported into Alexandria. Alexandria also supports both OtherId and SIF_Extended elements.

Go through and make adjustments to the fields where necessary.

Now your SIF should be set up!

Synchronization

Now that you've created your Chosen Sites list, it's time to sync Alexandria with the ZIS.

1. Click **Sync Selected Sites** in the bottom-right corner to import patrons into your database. During synchronization, only the selected schools in the Chosen Sites list will be synchronized.
2. If the process fails, go back to the Connection tab and verify that your ZIS Address is correct, and check the secured port numbers located at the end of the URL (e.g. 443).
3. Go to the **Message Viewer** tab. If an entire school of patrons was imported, you should see Incoming messages being received. As new patrons are being imported, the amount of messages in the **Created - Incoming/Outgoing** list will decrease.
4. When the list is empty, your students have been successfully imported! Now you may close the SIF Management window.

If you find that your patrons are not being imported, you may need to set the TimeFrame of Future.

Troubleshooting

If you're still having difficulty getting SIF to work correctly, here are some additional things to try:

- Check that your Message Mapping fields match your ZIS settings—especially if your patrons are being imported but their Personal Info is being saved to the wrong fields.
- Patron imports are recorded to the Circulation window's Transaction log; therefore, you can check the Transaction Log for confirmation that patrons are indeed being imported.
- Some changes made to the Connection, Message Handling, Message Viewer, and Message Mapping tabs of the SIF Management window may not take effect until you restart the SIF Agent. Therefore, after double-checking all of your relevant SIF settings, you may need to select Restart the SIF Agent from the Actions drop-down menu and try again.
- Double-check your Enable Encryption settings on the Connection tab.
- Keep in mind and take special care to ensure that the values that represent the site ID codes being imported from the SIF Agent exactly match the Site ID Code(s) stored in the Sites Management window; a non-match will result in a patron having their default Site setting assigned to the union site. Again, to reiterate: in order for the patron Site code to be successfully imported, it must match a valid Site ID Code stored in the Sites Management window.



Self-Hosted Users

If all else fails, email the "SIF Activity Log.txt" and the "Server Log.txt" from the Log subdirectory in the [Alexandria Support folder](#) to our [Customer Support Team](#).

Globally Unique Identifiers

There is a potentiality for problems when implementing SIF with an existing Alexandria SIF Agent. The Globally Unique Identifiers[4] (GUID) for each patron do not exist until a StudentPersonal or StaffPersonal message has been received for that patron. In these scenarios, existing patrons will need to be matched against imported SIF patrons by other means:

- Hopefully, you have an extracted list of data that contains your patron's full Name, Birthdate, or other unique, identifiable information available in both database sets.

- If matching patrons by name, you should prepare your data by comparing student names in your main SIS database with patron names as they exist in Alexandria. Any differences between the names should be noted and corrected in Alexandria before SIF is enabled. If multiple patrons have the same name, changes should be made to allow the imported SIF patron to match the one you want in your Alexandria database.
- Also, if matching by name, Alexandria includes the middle name as imported by SIF to match existing patrons; therefore, the names that SIF provides should be checked against Alexandria names before importing to make sure they provide exact matches.
- Alexandria provides a Patron SIF Updates report, which displays the patron's Globally Unique IDentifiers (GUID) and the last time their record was updated via SIF. This report can be sorted by patron Barcode or Last Name, Last SIF Update, or RefId and can be performed before and after synchronization to check for duplicated patron records.
- If this sort of error-checking is not implemented in these type of scenarios, then SIF patrons who are not successfully matched against existing patrons in your Alexandria database will be imported as new patrons.

[Link](#)