Implementing Sierra

EGL-IUG 2012

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Connie Strait, Greene County Public Library

About the libraries

The University of Akron Libraries

- Libraries
  - University Libraries (UL)
    - Bierce Library
    - Science & Technology Library
    - Archival Services
  - Law Library
  - Wayne College Library
  - Archives of the History of American Psychology (AHAP)
- 2 remote sites
  - Northeast Ohio Regional Depository
  - Goodyear Research

About the libraries

Wright State University Libraries

- 20,000 students, 2,400 faculty and staff
- 67 Library staff + student assistants
- 8 Hospital and Special Libraries (25 staff)

Greene County Public Library

- 7 libraries, 1 bookmobile
- 316,000 bib records in database
- 6500 new items processed monthly
- 92,000 registered borrowers
- 275,000 monthly circulation

Why be a development partner?

The University of Akron

- Development Partner pricing & benefits
- Timing
- Supports The University of Akron & University Libraries strategic action plans.

Wright State

- Desire to help guide development of Sierra
- Incentives from Innovative
- Beta-testing gave our staff time to familiarize themselves with the new interface
- Sierra represented a proactive, positive project for staff

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Sierra Implementation Timeline

- Purchase Sierra (library)
- View Sierra Orientation webinars (library)
- Install server/s (III)
- Install software on servers (III)
- Build Sierra database (III)
- Prepare staff with training or information sessions (library)
- Install Sierra Desktop App (library)
- Preview Sierra (library)
  - Review data & tables
  - Review & adjust logins
- Migrate & convert database (III)

Sierra Implementation Teams

The University of Akron

- **Team Leader:** Susan Ashby
- **Functional Experts:**
  - Susan Ashby: General Sierra functionality, system admin, system tools (create lists, Data Exchange, statistical reports)
  - Frank Bove: ERM
  - Michael Dowdell: Sierra Desktop App
  - Carol Ficken: Acquisitions & serials
  - Melanie Smith-Farrell: Circulation, course reserves, booking
  - David Prochazka: Cataloging, item/bib record creating/ editing, display, & searching
- **Duties of team members & functional experts:**
  - Create implementation, orientation, & testing plans
  - Lead staff in respective departments & functional areas during Sierra testing & implementation
  - Track, coordinate, & report Sierra problems & issues to III

Sierra Implementation Teams

Wright State

- **Team Leader:** Leigh Duncan
- **Data Analysts:** Leigh Duncan, Marty Jenkins (head of technical services), Susan Wehmeyer (head of circulation)
- **Training Coordinator:** Leigh Duncan
- **Functional Experts:** staff in the following areas
  - Circulation (General, Reports, Holds, Inn-Reach)
  - Cataloging (General, Reports, Record Loads, Labels)
  - Acquisitions (General, Invoicing)
  - Serials (General, Checkin)
  - ERM
  - Create Lists/Statistics

Sierra Implementation Teams

Greene County Public Library

- **Project Leaders:** Jim Mann and Larry Fischer
- **Database:** Connie Strait, Mark Savitski, Larry Fischer
- Functional Experts and Trainers from in-house staff at Greene County

Sierra Training

The University of Akron

- Sierra Drop-In Clinics
  - 5 sessions weekly a month prior to migration
  - Sessions consisted of a Sierra overview, 1 or 2 focused topics, & hands-on participation
  - Purpose
    - Explain the development partner testing process
    - Provide Sierra overview
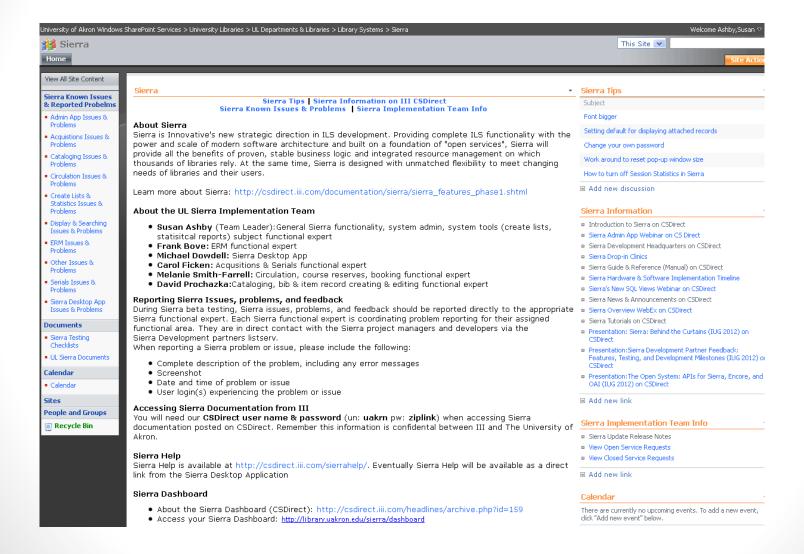   - Preview Sierra
    - Answer questions & address concerns

Wright State

- No formal training desired by staff
- Conducted information and demonstration sessions prior to migration
- Provided individual instructions sessions as needed

Greene County Public Library

- Training for all staff and departments a month prior to migration
- Training for Technical Services on Acquisitions, Cataloging, & Serials

Sierra Information Sharing

The University of Akron – UL Sierra SharePoint
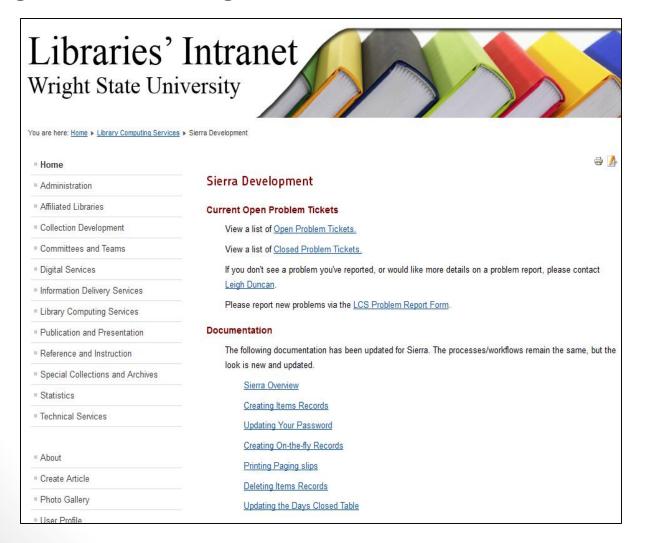
Sierra Information Sharing

The University of Akron

- E-mail announcements as appropriate
- UL Sierra SharePoint
    - Created to provide Sierra related information to UA Libraries faculty & staff
    - First used as a clearing house for Sierra news, information & test database access instructions.
    - Currently used as a clearing house for Sierra news, information & post migration information such as known issues, reported problems & tips.

Sierra Information Sharing

Wright State

- Prior to beta-testing
  - Created pages on our intranet to share development information disseminated by Innovative
- During beta-testing
  - Weekly e-mail messages
  - Continued updating intranet pages
- Post-migration
  - Weekly e-mail messages
  - Specific messages for software updates
  - Maintaining intranet pages with lists of open & closed problem tickets

Sierra Information Sharing

Wright State Post-migration intranet site

Preparing the System – Hardware & network

The University of Akron

- 2 new servers installed
  - Millennium/Sierra Application Server
  - Sierra Database Server
- 2 new network connections in server room requested
- 3 new IP addresses requested
  - Sierra App & DB servers require an IP address for server & console port access
  - Millennium/Sierra App server retains IP address
- Upgraded to Release 2011

Wright State

- Server installation and connectivity services provided by campus Computing Department
- 2 network connections (IPs) required
  - Server
  - Management Interface (console)
- Security Scan required

Preparing the System – Sierra Desktop Application (SDA)

The University of Akron

- Systems staff & student assistant installed SDA on UL & AHAP computers
- Systems staff provided instruction & assistance to Law & Wayne techs will installs
- SDA installed on Windows 7, XP, Mac, and Linux computers with very few problems.
- Set-up instructions only indicated ports 63000 & 63100 so remote sites could not launch SDA until port 64000 was opened on UA firewall

Wright State

- Three new firewall ports required (63000, 63100, 64000)
  - Difficulties with hospital & special libraries
- Problems loading client on Macintosh and some Windows 7 computers
  - Work-around: load client from a flashdrive, rather than the web-based Sierra Dashboard

Preparing the System – Sierra users, settings, workflows

The University of Akron
- Retained use of Millennium initials & password
- Updated user accounts in specific order
  - 1) circulation service points 2) faculty/staff 3) students
- User by user review & update of individual circulation service points & faculty/staff user accounts
- Met with functional supervisors and select faculty/staff in each library & functional areas to create customized workflows 1-2 weeks after Sierra migration

Wright State:
- Sierra user account combines the Millennium login & initials
- Shared information from the Millennium login (e.g. printers, location served, options group, accounting unit) is not part of each individual user account
- Created 2 spreadsheets
  - Login settings
  - Staff initials (usernames) with anticipated workflows

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Migration Day

The University of Akron

- Migrated to Sierra on June 27, 2012
- Migration took approximately 5 hours
  - 4 hours conversion
  - 1 hour data testing & quality control by III
- Live on Sierra immediately following completion of testing & quality control
- Migration was smooth & problem free

Migration Day

Wright State

- Innovative System is shutdown at approximately 11am EST
- Sierra conversion process – 4 hours
- Data testing/quality control (by Innovative staff) – 2 hours
- Data testing/quality control (by Wright State staff) – 1 hour
- Uploading offline circulation data – 30 minutes
- Migration went according to plan . . . mostly ☺
- Unforeseen difficulties
    - Connectivity issues after conversion (1 hour)
    - Backup failure (3 days)

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Post-migration testing

The University of Akron

- Used CSDirect Post Event checklist & checklists developed by functional experts
- Started in Circulation & worked our way through other functional areas & libraries
- Visited functional areas with laptop to immediately fix login/permissions issues

Wright State

- Created test records and test circulation transactions
  - Post-migration, completed test circulation transactions
- Printed several test records prior to migration
  - Post-migration, verified record data
- Printed copies of several user accounts
  - Post-migration, verified user account data
- Printed network administration settings
  - Post-migration, verified IPs and settings

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Tips

- Create a plan to prepare staff for Sierra migration
- Create a post migration check-list for testing in each functional area
- Create a Sierra migration team, appoint functional experts
- Familiarize yourself with the Admin App
  - CSDirect links to the Sierra Web Help manual
  - Dedicate thought and time to creating your user accounts and workflows
- Visit functional areas once Sierra is up and running to make adjustments to user accounts and permissions as needed
- Remove Millennium client shortcuts during system downtime
- Post migration, the old shortcuts either will not work or will launch Sierra (confusing to staff)
- Set times for staff to view and discuss Sierra Videos on CSDirect
  - The more familiar they are, the easier their transition will be
- Share Sierra information available on CSDirect
  - Knowledge base, presentations, videos
- Visit a library that is on Sierra

Sierra Information on CSDirect

- CSDirect
  - Sierra Presentations
    - http://csdirect.iii.com/documentation/presentation_archive.php
  - Sierra Knowledge Base
    - http://csdirect.iii.com/sierra/kb/index.php
- Sierra Web Site
  - http://sierra.iii.com/
- Sierra Blog
  - http://blog.sierra.iii.com/

Millennium vs Sierra

- Video clip

Sierra Preview

- General Sierra overview
  - Navigation & buttons
  - Search and display
- Circulation
- ERM
- Acquisitions
- Serials
- Cataloging
- Create Lists
- Statistics
- Data Exchange

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Questions?

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