

# Implementing Sierra

**EGL-IUG 2012**

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Leigh Duncan, Wright State University

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

# 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

University of Akron Windows SharePoint Services > University Libraries > UL Departments & Libraries > Library Systems > Sierra

Welcome Ashby,Susan

Sierra

Home

This Site

Site Actions

View All Site Content

**Sierra Known Issues & Reported Problems**

- Admin App Issues & Problems
- Acquisitions Issues & Problems
- Cataloging Issues & Problems
- Circulation Issues & Problems
- Create Lists & Statistics Issues & Problems
- Display & Searching Issues & Problems
- ERM Issues & Problems
- Other Issues & Problems
- Serials Issues & Problems
- Sierra Desktop App Issues & Problems

**Documents**

- Sierra Testing Checklists
- UL Sierra Documents

**Calendar**

- Calendar

**Sites**

**People and Groups**

Recycle Bin

**Sierra**

**Sierra Tips**

- Subject
- Font bigger
- Setting default for displaying attached records
- Change your own password
- Work around to reset pop-up window size
- How to turn off Session Statistics in Sierra
- Add new discussion

**Sierra Information**

- Introduction to Sierra on CSDirect
- Sierra Admin App Webinar on CS Direct
- Sierra Development Headquarters on CSDirect
- Sierra Drop-in Clinics
- Sierra Guide & Reference (Manual) on CSDirect
- Sierra Hardware & Software Implementation Timeline
- Sierra's New SQL Views Webinar on CSDirect
- Sierra News & Announcements on CSDirect
- Sierra Overview WebEx on CSDirect
- Sierra Tutorials on CSDirect
- Presentation: Sierra: Behind the Curtains (IUG 2012) on CSDirect
- Presentation: Sierra Development Partner Feedback: Features, Testing, and Development Milestones (IUG 2012) on CSDirect
- Presentation: The Open System: APIs for Sierra, Encore, and OAI (IUG 2012) on CSDirect
- Add new link

**Sierra Implementation Team Info**

- Sierra Update Release Notes
- View Open Service Requests
- View Closed Service Requests
- Add new link

**Calendar**

There are currently no upcoming events. To add a new event, click "Add new event" below.

**About Sierra**

Sierra is Innovative's new strategic direction in ILS development. Providing complete ILS functionality with the power and scale of modern software architecture and built on a foundation of "open services", Sierra will provide all the benefits of proven, stable business logic and integrated resource management on which thousands of libraries rely. At the same time, Sierra is designed with unmatched flexibility to meet changing needs of libraries and their users.

Learn more about Sierra: [http://csdirect.iii.com/documentation/sierra/sierra\\_features\\_phase1.shtml](http://csdirect.iii.com/documentation/sierra/sierra_features_phase1.shtml)

**About the UL Sierra Implementation Team**

- Susan Ashby** (Team Leader): General Sierra functionality, system admin, system tools (create lists, statistical reports) subject functional expert
- Frank Bove**: ERM functional expert
- Michael Dowdell**: Sierra Desktop App
- Carol Ficken**: Acquisitions & Serials functional expert
- Melanie Smith-Farrell**: Circulation, course reserves, booking functional expert
- David Prochazka**: Cataloging, bib & item record creating & editing functional expert

**Reporting Sierra Issues, problems, and feedback**

During Sierra beta testing, Sierra issues, problems, and feedback should be reported directly to the appropriate Sierra functional expert. Each Sierra functional expert is coordinating problem reporting for their assigned functional area. They are in direct contact with the Sierra project managers and developers via the Sierra Development partners listserv.

When reporting a Sierra problem or issue, please include the following:

- Complete description of the problem, including any error messages
- Screenshot
- Date and time of problem or issue
- User login(s) experiencing the problem or issue

**Accessing Sierra Documentation from III**

You will need our **CSDirect user name & password** (un: **uakrn** pw: **ziplink**) when accessing Sierra documentation posted on CSDirect. Remember this information is confidential between III and The University of Akron.

**Sierra Help**

Sierra Help is available at <http://csdirect.iii.com/sierrahelp/>. Eventually Sierra Help will be available as a direct link from the Sierra Desktop Application

**Sierra Dashboard**

- About the Sierra Dashboard (CSDirect): <http://csdirect.iii.com/headlines/archive.php?id=159>
- Access your Sierra Dashboard: <http://library.uakron.edu/sierra/dashboard>

# 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.

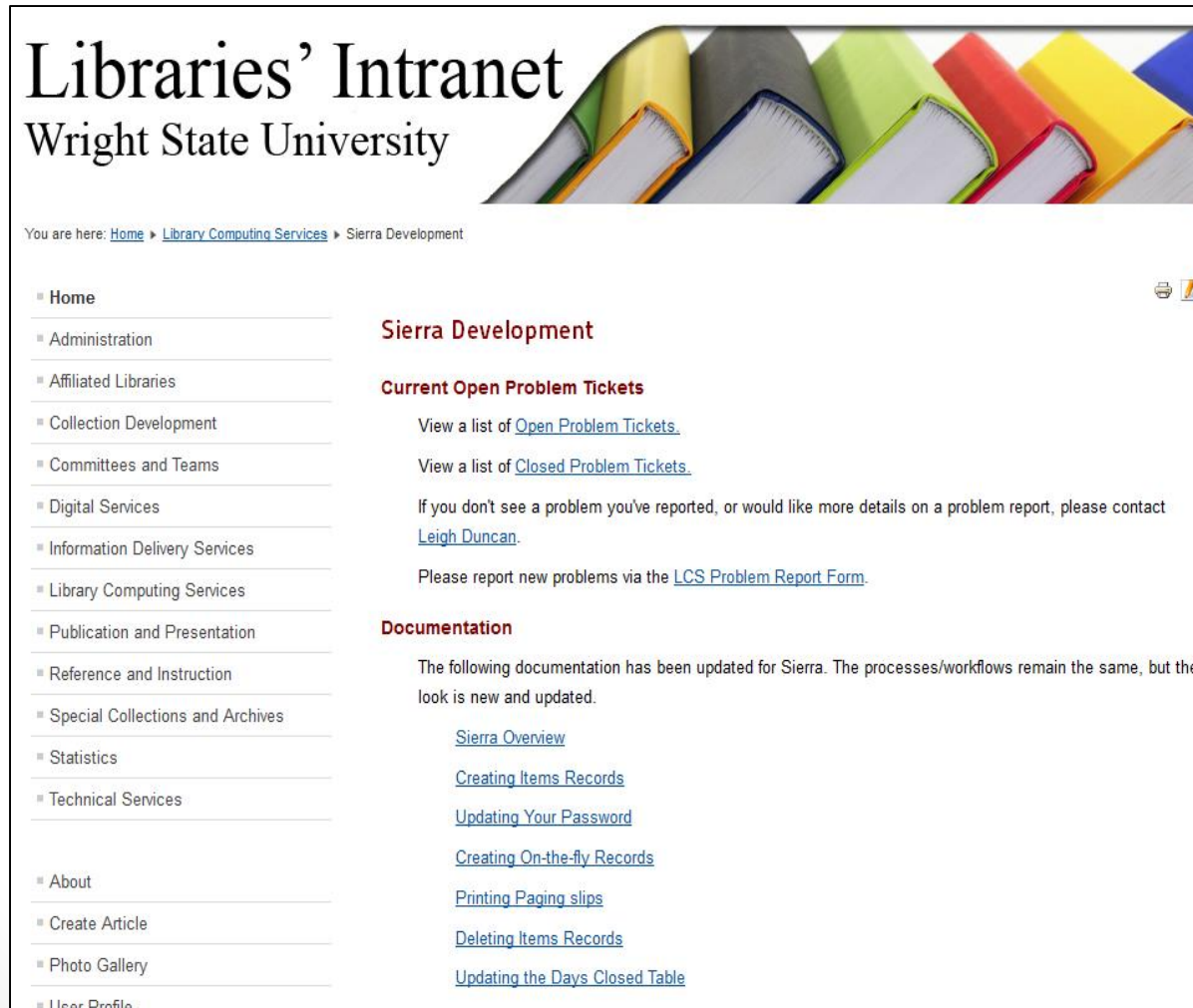
# Sierra Information Sharing

## 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



**Libraries' Intranet**  
Wright State University

You are here: [Home](#) > [Library Computing Services](#) > Sierra Development

- Home
- Administration
- Affiliated Libraries
- Collection Development
- Committees and Teams
- Digital Services
- Information Delivery Services
- Library Computing Services
- Publication and Presentation
- Reference and Instruction
- Special Collections and Archives
- Statistics
- Technical Services
- About
- Create Article
- Photo Gallery
- User Profile

### Sierra Development

#### Current Open Problem Tickets

View a list of [Open Problem Tickets](#).

View a list of [Closed Problem Tickets](#).

If you don't see a problem you've reported, or would like more details on a problem report, please contact [Leigh Duncan](#).

Please report new problems via the [LCS Problem Report Form](#).

#### Documentation

The following documentation has been updated for Sierra. The processes/workflows remain the same, but the look is new and updated.

- [Sierra Overview](#)
- [Creating Items Records](#)
- [Updating Your Password](#)
- [Creating On-the-fly Records](#)
- [Printing Paging slips](#)
- [Deleting Items Records](#)
- [Updating the Days Closed Table](#)

# 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



# 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)

# 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

# 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](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

# Questions?

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