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Tale of Two Implementations: Marquette's Sierra Implementation Experience

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Tale of Two Implementations: Marquette's Sierra implementation experience

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MARQUETTE
UNIVERSITY

Be The Difference.



SIERRA DEVELOPMENT TEAM (SDT)

Tara Baillargeon (Head of Research & Instructional Services)

Judith Carter (Head of Technical Services)

Christopher Daniel - Functional expert: Acquisitions

Rosemary DeToro (Electronic Resources Librarian)

Thomas Doyle – Functional expert: Circulation

Alice Gormley (Serials Librarian)

Angelina Joseph (Law Librarian)

Chris Pivonka – Functional expert: Reserves

Keven Riggle – Data expert

Ed Sanchez – Team Leader

Joan Sommer (Head of Access Services)

Elaine Steiner – Functional expert: Serials

Rose Trupiano (Research and Instructional Services Librarian)

Lynn Whittenberger – Training expert

TIMELINE

January 2012: Sierra Development Team created, met biweekly

February 2012- May 2012: tested Sierra functionality on test server (Grizzly) and developed staff training sessions.

June 2012- August 2012: Held training sessions for staff

July 2012: Millennium migrated to new virtual server ; local Sierra test DB created

July 2012: “Preview period”

- set up users / permissions/ workflows for staff prior to ‘go live’ date

August 2012: **Sierra goes live at MU**

August 2012- November 2012: troubleshooting Sierra & error reporting/followup with III

January 2013: End of project party for the Sierra Development Team!

The work of the development team

- Functional experts in each area tested Sierra functionality at each point in the process: test server (Grizzly) ; Preview database ; live database.
- Functional experts reported findings to the SDT, which communicated with the Innovative/Sierra Project Management team via e-mails and conference calls

The work of the development team

- SDT developed a “bucket list” of must-have functionality before we were comfortable going live with Sierra.
 - Worked with III/Sierra Project management team to resolve & fix “bucket list” items prior to the August 2012 ‘go live’ date
- Training expert and Functional experts developed staff training sessions
 - General overview sessions for staff
 - Specialized training sessions for: Circulation, Cataloging, Acquisitions, Create lists functionality, ERM, Bindery

The work of the development/migration team

- Post-migration troubleshooting and error reporting with III project management team:
 - Weekly conference calls with III to resolve urgent problems
 - Conference calls became biweekly, then monthly over time
 - Shared spreadsheet was instrumental in tracking Sierra problems. It included the open call number, progress to date & who at III we have corresponded with on the issue

GETTING THE SYSTEM READY

- Upgrade to Millennium 2011 (1.5) and Encore 4.1 (or higher)
- Upgrade to Webpac Pro per service commitment
- Re-index of our catalog using the Advanced Keyword Index
- Validation of our SSL certificates
- We worked with Doug Randall at Innovative to determine virtual server specs – database server: 8 CPU and 25 GB RAM; application server 4 CPU and 8 GB RAM. After the migration we adjusted to 4 CPU/32 GB RAM and 2 CPU/12 GB RAM respectively.
- Opened ports 63000, 63100, 64000 at campus firewall
- Review and removal of obsolete logins (including character based) as far in advance as possible

- Reviewed statistics groups – in Sierra statistics group table is required.
 - All groups included?
 - All groups have tables?
- Made sure all logins have a statistics group assigned – but do not assign stat group (0) Patron Initiated to a login. It is system activity.
- Checked Locations Served table and groups
 - What of each do I have assigned to my login?
 - Am I missing entries?
 - Are my labels up to date?

Preparing to Migrate

- Database seeding
 - Created database on our dbserver (lasts about 2 weeks) with no downtime
- Access to Admin app, Sierra Desktop App and Dashboard
- Preview mode
 - Set up users for every Millennium set of initials including Applications, Workflows, and Permissions.
- Downloaded and cleared WAM stats – requires 2 days!
- Cleared headings reports
- Performed full backup
- Took ownership screenshot of our review files

Migration Day!

- 4 – 6 hours of downtime
- Load offline transactions
- Verified review files migrated successfully
- Post-migration checklist
 - Functional experts in each area tested Sierra functionality and reported problems to the SDT

SIERRA BENEFITS

- Beta/Early adopter program
- Promise of 100% Millennium functionality
- Preview period
- Easy migration and transition for staff

- More intuitive interface
 - Faceted display for limiting searches
 - Side bar action items versus tabs – especially in circulation
 - Workflows combine functionality without opening another session
 - No more locked records via Millennium transactions file, no broken holds, no broken checkouts
 - Circ “color transaction action” hold pick up - a fine info shows up in red

- Single level login
 - No more initials
 - Workflows = a login for multi-modules

- Relational PostgreSQL database and Sierra DNA (Database navigator) creates a better foundation for future expansion via an open systems architecture
- Web-based Admin app
 - Not depended on client, Accessible anywhere
 - Admin functions in one place
 - Intuitive user management
- Updates and patches involve no downtime and can be loaded during real hours. More frequent fixes.

Tips

- Being a Beta Development Partner is challenging, but can be rewarding:
 - We were able to talk directly to (text) high-level people at III to address issues of Sierra functionality & “look/feel”
 - Compact browse was not our preference
 - According to John McCullough and Betsy Graham of Innovative we were tops in terms of providing clear, useful, feedback to their development team.

Tips

- Planning
 - Think ahead in terms of fiscal close and other system-wide scheduling needs
- Communication
 - Be sure to include your Dean/Director in communicating outages and/or changes in service
 - Find the least disruptive time for your user community and give them plenty of notice

Tips

- Be persistent!
 - Follow up emails and conference calls with III on a regular basis helped get many of our issues resolved
 - Finding someone in III who can advocate for you is also especially helpful (shoutout to Betsy Graham, who was wonderful!)

Questions?

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