Tale of Two Implementations: Marquette's Sierra Implementation Experience

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Marquette’s Sierra implementation experience

Ed Sanchez - Head of Library Information Technology

Lynn Whittenberger – Metadata Librarian
SIERRA DEVELOPMENT TEAM (SDT)

Tara Baillargeon (Head of Research & Instructional Services)
Judith Carter (Head of Technical Services)
Christopher Daniel - Functional expert: Acquisitions
Rosemary DelToro (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 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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