

# Migration to Sierra

IX Spotkanie Polskiej Grupy Użytkowników Systemu Virtua  
9-10 czerwca 2016 r.  
Biblioteka Politechniki Lubelskiej

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Introductions – Innovative staff attending (introduce all III staff)  
For smaller groups, introductions by the library and roles.  
Collect attendee names, roles, and contact information for Netsuite.

# PPOR for Sierra

## Theme: New beginnings

- Create Lists enhancements
- New Knowledge base
- Sierra Web for Circulation
- Dataservice updates for Encore

## Theme: Focus on the fundamentals

- Move ERM to IOLS
- Optimize WAM
- Raise system limits, make architecture updates, and improve performance
- Improve installation and migration process
- Enhance support for patron self service
- Focus on standards
- Improve holds behavior
- Migrate RefDBs

## Theme: A better foundation for the future

- Focus on Unicode, internationalization, and localization
- Build reporting database to support better customer reporting outputs and internal business intelligence
- Improve audit trail
- Move catalog to IOLS
- Complete move to Data Service
- Complete system limits updates



- New Create Lists
- Complete workflows in Sierra Web Application
- SIP2 enhancements
- Transfer holds

## Theme: Forging ahead

- Focus on integrations with Learning Management Systems
- Improve course management workflows
- Provide support for postal and zip code integration
- Create new notification framework
- Move admin tools to IOLS
- Improve support for library event management

## Theme: Staff efficiencies for better services

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sierra

## Reasons to move to Sierra

- Next Generation Library Services Platform
- Open Cloud Solution
- Staff Full Web Access
- Patron Mobile Apps & Staff Mobile Access
- Superior Staff Experience
- Unified Resource Management for all resource types
- Integrated ERM & Knowledgebase

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- Patron Mobile Apps: Everyone is on a mobile device these days. With Sierra, patrons can hold your library's resources in their hands, wherever they are. Our mobile self-service app provides article, print, and eBook real-time availability in a single integrated interface. But that's not all: patrons can directly access and checkout the resources from their device. Sierra brings the library to patrons' fingertips.

- Staff Mobile Access: Feel empowered with the on-the-go capabilities of Sierra Mobile Worklists. Our mobile material handling reduces processing time and eliminates paper lists; it's as easy as scanning book barcodes with the camera on your device. And that's just the beginning. Upcoming Sierra Web Circulation will also include checkouts, check-ins, renewals, catalog access, and patron account management, all accessible via mobile browsers, so you can serve patrons where they are: on the floor, in the stacks, or outside the building at library events.

- Superior Staff Experience: Sierra not only matches but also improves upon the Millennium experience. With a unified client, faceted results, and additional Create List options, staff will save time and energy without the burden of learning a new system. Sierra's simultaneous views and actions mean no more busy records and broken transactions, and the web-based user administration means fewer headaches for systems administrators. These improvements translate into a more scalable solution for individual libraries and consortia.

- Open, Open, Open: Sierra's open database provides complete access to your data,

greatly expanding your capabilities to analyze trends and usage. Coupled with our development of REST APIs, Sierra connects seamlessly to outside systems, thirdparty providers, and library-developed solutions. The possibilities for expanding the patron, librarian, and staff experiences are endless.

- Stay Current: Sierra is a modern library services solution that is built to evolve with technological advancements. Whether providing support for emerging formats, breaking down data limits, or utilizing new transaction models, Sierra allows libraries to keep pace both today and into the future. Designed for extensibility, flexibility, and cloud-optimization, Sierra updates are seamless so you can focus on



sierra

## Reasons to move to Sierra

- Sierra APIs: Open, Open, Open.
- SQL based Database
- No Oracle
- Integration Capabilities
- Management Information & Analytics:
  - Decision Center
  - Sierra Web Management Reports & Statistics
  - Create List and SQL Access
- Stay Current..

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## Encore Duet *Discovery Solution*

- Single search interface
- Fast & Relevant results returned
- Instant access to full text (where available)
- Full-text articles from EBSCO Discovery Service™ (EDS)
- Discovery on-the-go from any device
- Intuitive interface with customization options
- Analytics & Reporting
- Real time Integration with Sierra





## SkyRiver *Cataloguing Utility*

- 60 million+ bibliographic records, including British Library
- Copy cataloging, original cataloging, and batch editing
- Z39.50 search capability
- Verify subject headings with full LC authority files
- RDA made easy
- SkySearch record-requesting service
- SkyWatch Optional CIP record upgrade notifications
- SkyMatch Materials vendor data integration





**Inn-reach**

## **INN-Reach** *Resource Sharing*

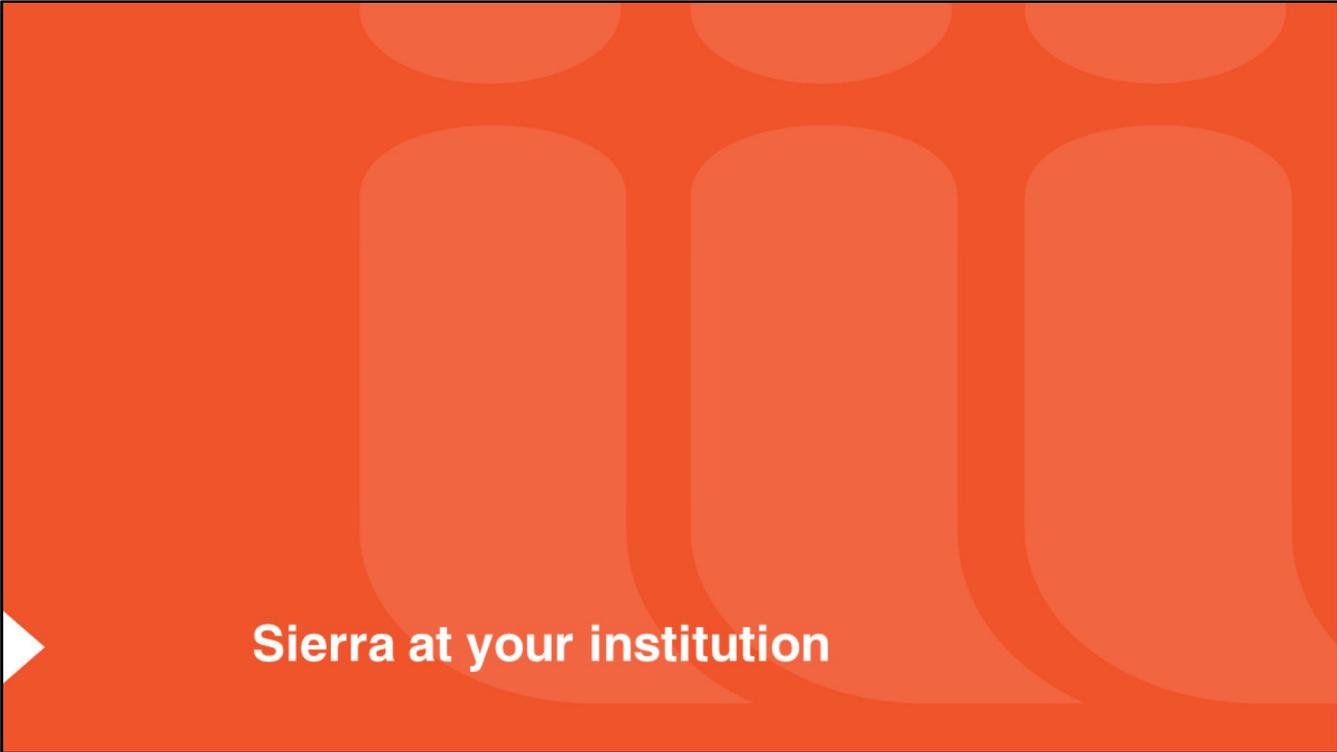
- Expand your library's resources!
- One touch fulfillment
- Print and media resource sharing for libraries
- Online requesting
- Pick Up Anywhere
- Access to millions of books
- Quick turnaround
- Close integration with Sierra and Encore
- High fulfillment rate

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**Sierra at your institution**

# Migration Proposal

## Minimum Package

- Sierra LSP
- Encore

## Optional

- Encore Duet with EDS integration
- Mobile Apps
- Decision Center
- Hosting



## Migration Proposal – Separate

- License free migration cost, Only charge for services and optional items
- Cost depending on the size of the library
- You will get same functionalities but a lot more
- Migration services includes:
  - Project management
  - Hardware / software setup
  - Data profiling
  - 3 days of Onsite training, 54 hours of Online Trainer Consultation
  - Implementation consultation and go-live support
- Migration will take between 4 to 6 months



## Migration Proposal – Consortium

- License free migration cost
- Consortium licensing depending on the members
- Additional services for data handling to a single Sierra instance
- Project could start in 2017:
  - Includes PM, HW/SW Setup, Data Profiling
  - 12 Days of Onsite Training (Central Location)
  - Up to 80 hours of Online Trainer Consultation
  - 2 Days of Onsite Consulting
  - 3 Days of Go Live Assistance On-Site



**SIERRA IMPLEMENTATION DRAFT TIMELINE FOR Poland Consortium**

This draft timeline outlines overall steps and responsibilities for a Sierra implementation for a larger, more complex library system such as the Poland consortium. Event order and event time frames may be adjusted, e.g. time allotted for library tasks may be extended or compressed. A project plan tailored to the Poland Consortium will be mutually agreed upon after innovative meets with you and fully understands your library's requirements.

MAJOR TASKS	DATES	TASK COMPLETED BY	RESPONSIBLE PARTY
1 Provide Access to Documentation	Week 1		Library
2 Initial Conference Call with Project Leaders	Week 1		Library
3 Finalize project plan	Week 1		Library
4 Deliver Bib/Item/Auth Data Sets for profile database	Week 2		System Engineer
5 Deliver Patron, Circ transactions, Acquisitions, Serials Data Sets (profile database)	Week 2		System Engineer
6 Setup Sierra Server	Week 2		System Engineer
7 Consultation Meeting	Week 2		System Engineer
8 Analyze Bib/Item data files and draft profile	Week 2		System Engineer
9 Webinars: Sierra Intro; Review Parameters and Database Profile	Week 2		System Engineer
10 Deliver Completed Profile Spreadsheets	Week 2		System Engineer
11 Customize DB Profile and Load Bib/Item Data	Week 2		System Engineer
12 Setup Encore Server	Week 2		System Engineer
13 Sierra Desktop App workstation Install, Test connection to Sierra/Encore servers	Week 2		System Engineer
14 Training 1	Week 2		System Engineer
15 Customize Encore and WebPAC	Week 2		System Engineer
16 Test Database Profile	Week 2		System Engineer
17 Input Circulation and Acquisitions Parameters	Week 2		System Engineer
18 Load Patron Profile Data	Week 2		System Engineer
19 Training 2	Week 2		System Engineer
20 Test Circulation and Acquisitions Parameters	Week 2		System Engineer
21 Test Patron Profile	Week 2		System Engineer
22 Training 3	Week 2		System Engineer
23 Front-line staff training provided by Library	Week 2		Library
24 Training 4	Week 2		System Engineer
25 Training Server Build	Week 2		System Engineer
26 Deliver and Load Full Data: Bib/Item/Authority (includes gap load if needed)	Week 2		System Engineer
27 Go Live on Cataloging	Week 2		System Engineer
28 Deliver and Load Full Data: Acs/Ser	Week 2		System Engineer
29 Go Live on Acquisitions/Serials	Week 2		System Engineer
30 Deliver and Load Full Patron Data	Week 2		System Engineer
31 Migrate Circulation Transactions	Week 2		System Engineer
32 Go Live on Encore/Circulation	Week 2		System Engineer
33 Implement Electronic Resource Manager	Week 2		System Engineer
34 ERM Training	Week 2		System Engineer
35 Sierra implementation Complete	Week 2		System Engineer

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# Hardware requirement

- We offer hosting
- Virtualization supported using VMware
- Sierra needs 2 servers and Encore 1 server
- Supported platform: RHEL 6 x86\_64 and CentOS 6 x86\_64
- Recommended HW configuration:

- C2

8cores Processor

24 GB Memory

200 GB Disk

- D2

24cores Processor

48 GB Memory

300 GB Disk

- C1

8cores Processor

16 GB Memory

100 GB Disk



## Integration with 3<sup>rd</sup> Parties

- SIP2/SIP3
- Payment APIs
- My Account API
- PC Booking Systems
- EDI in entire process, from quotes to fulfilment and Invoices – monographs and serials
- Integration with Finance System for payment
  
- Full suite of API's
- Sierra designed for seamless integration

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Self-check machines  
Sorters  
Agresso etc, EDI fact

## Hosting Services

- Tier 4 Data center in Dublin, Ireland
- Highest availability – resilience and redundancy built in including several ISP
- 99.9% Service Level
- Over 90 customers hosted in Dublin



**Thank you!**



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