Moving to Sierra

User Interfaces
Hicks, Thomale, Weng
10/30/2012

Welcome to our Q&A session about the migration to Sierra.

> What's Sierra?
>
> Why are we moving to it?
>
> What's the plan?
>
> Will Sierra have ... ?
>
> Where can I find out more?

We know you guys probably have a lot of questions, and I want most of our time to be devoted to discussing those. But we want to start out by making a quick presentation that we hope will answer some of the more common questions that you may have—and at least get us all up to speed on what's going on.

Also—we'll be making this presentation available to you after this is over, so don't feel the need to take copious notes.
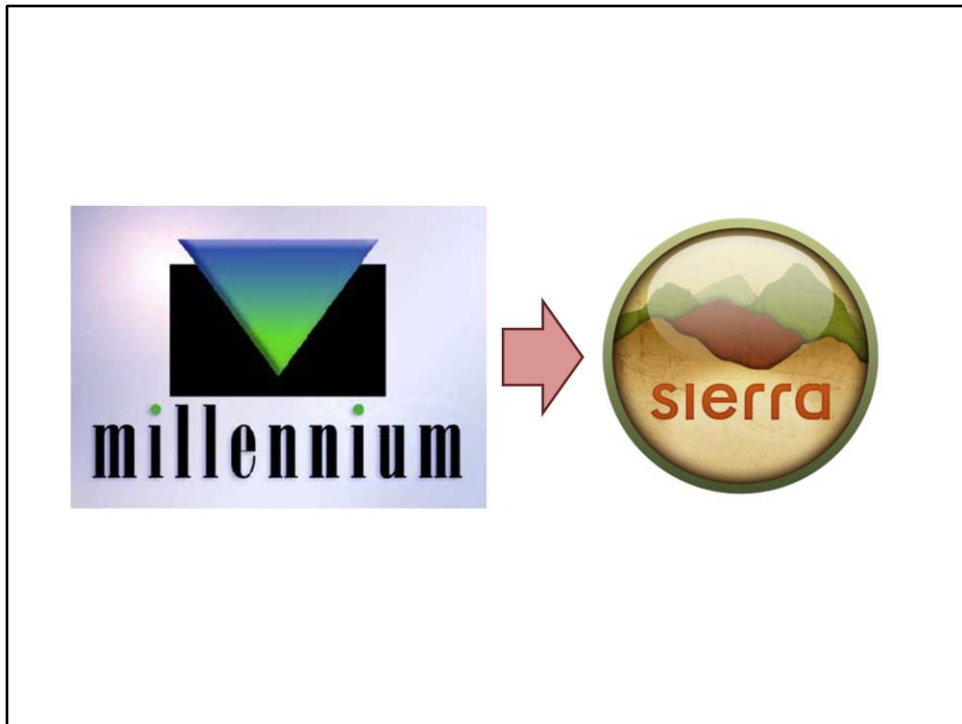
What's Sierra?

Why are we moving to it?

What's the plan?

Will Sierra have … ?

Where can I find out more?

I hope that most of you aren't still wondering this, but—in case you are—here's a quick rundown of what this whole "Sierra" thing is, anyway.

Short answer: Sierra is the new Millennium. It is the newest Integrated Library System from Innovative Interfaces, and for us it will replace Millennium. The system was first announced at the Innovative Users Group Conference in April, 2011. Last summer there was a sign-up period for early adopters that gave a nice discount to those who signed up. We decided that the rewards for moving to Sierra sooner outweighed the risks, and October 2011 is when we signed an early-adopter agreement. Our scheduled move to Sierra is coming up soon, and that's why we're here talking about this now.
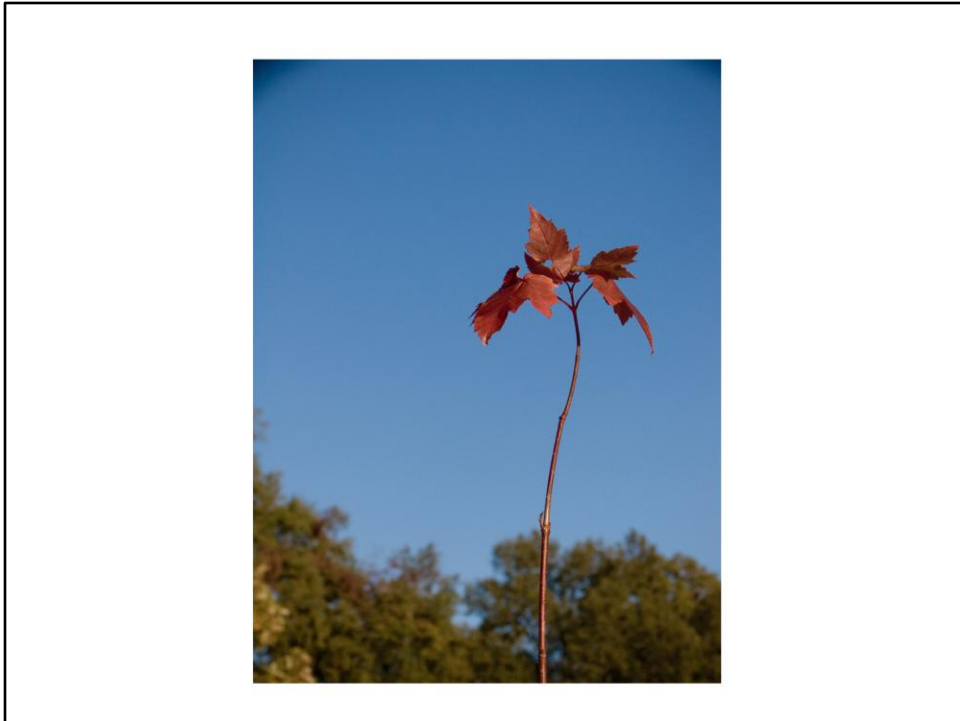
What's Sierra?

Why are we moving to it?

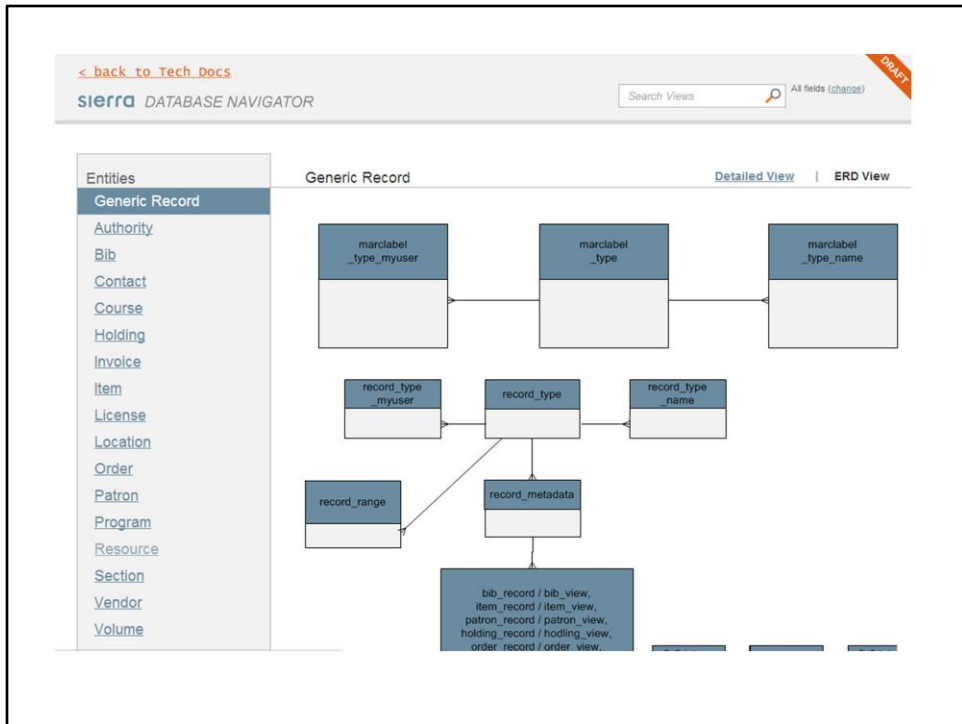What's the plan?

Will Sierra have … ?

Where can I find out more?

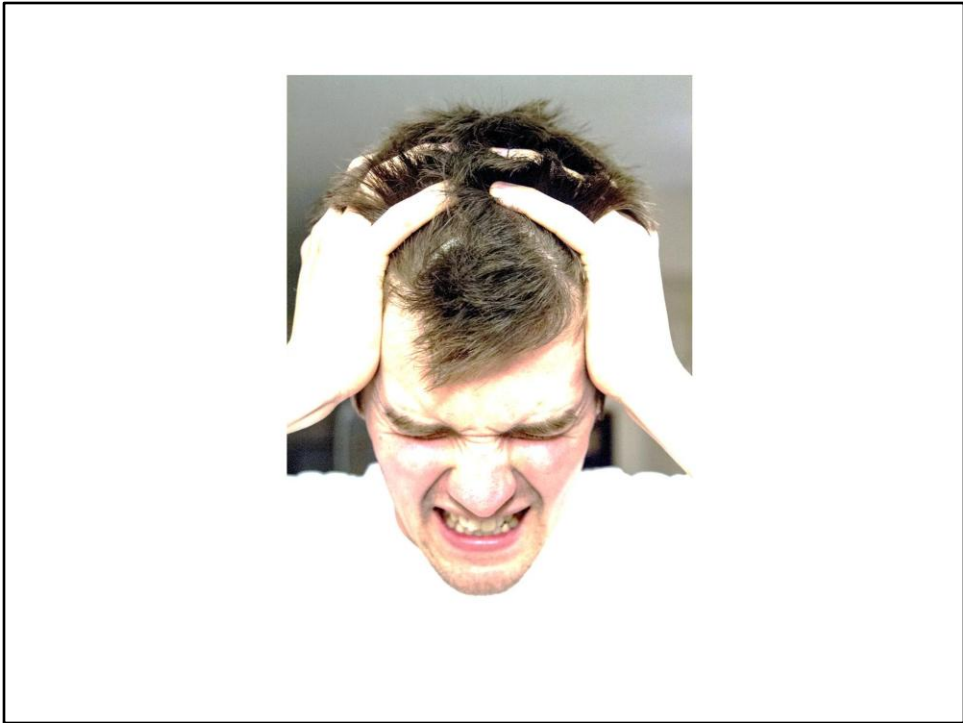Why are we moving to Sierra? What benefits will it bring?

First, from your perspective and from our patrons' perspective, Sierra is not going to look and behave a whole lot differently than Millennium. Although there are some differences, Sierra represents more a reengineering of the system code and underlying database than the workflows, business logic, functionality and user interface. The WebPAC will look exactly the same. The Sierra Desktop Application will replace the Millennium client, but the two are similar enough that—by all accounts— it's easy for Millennium users to pick up and start using without much training. III's mantra all along has been that 100% of Millennium functionality will be in Sierra from day one. Depending on how you feel about Millennium functionality, that could be a benefit or a drawback…
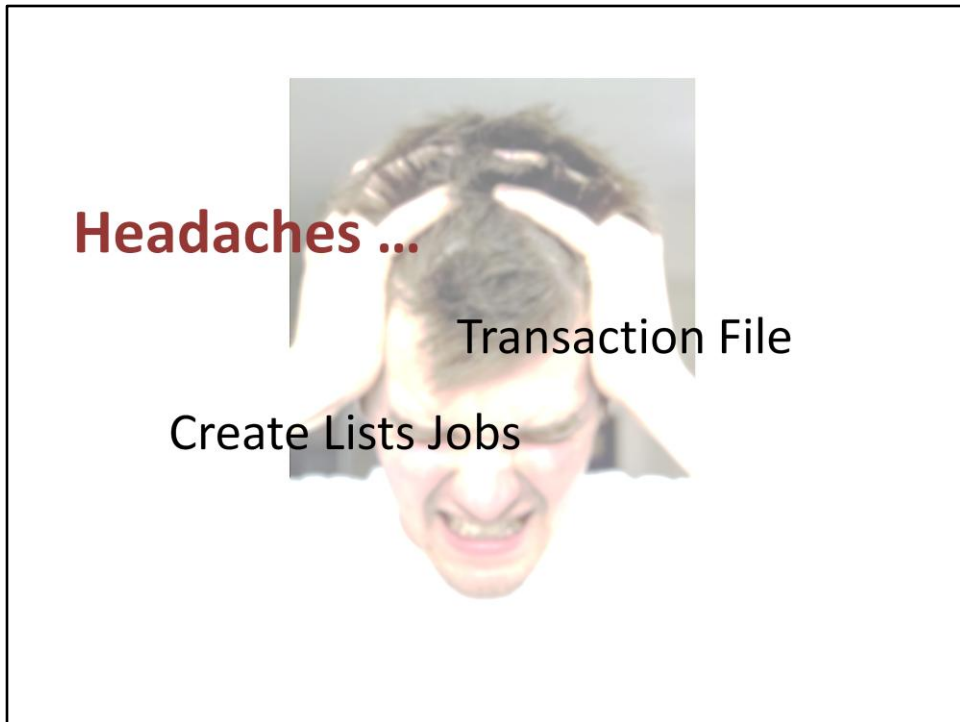
The primary benefit is that Sierra hopefully gives us (and III) more room for future growth and enhancement compared to Millennium. Millennium was built on top of III's first ILS, Innopac, which used data access and storage technology that was unique to that system. As the technology has aged, it's become more and more difficult to change and enhance. But Sierra has been built based on industry-standard, open-source relational database and indexing software using a service-oriented architecture. At the very least this should make the system easier for III to maintain and enhance, and their promise (and our hope) is that we will have more opportunity to interact with the database, build local extensions, and generally do more with our data than we could using Millennium.

From the beginning we will have read access to the SQL database underlying the system, and Innovative has published complete documentation on the database structure. This lets us pull out data and do complex reports that we couldn't do in Millennium. (Pictured is a screenshot from their database documentation.)

Millennium had several things that caused headaches but are fixed in Sierra.

No more transaction file. Database transactions are processed completely differently in Sierra than they were in Millennium. This removes one point of failure that could cause Millennium to crash. It also means that staff can run global updates and record loads any time without worrying that it's going to slow down the system for everyone else.
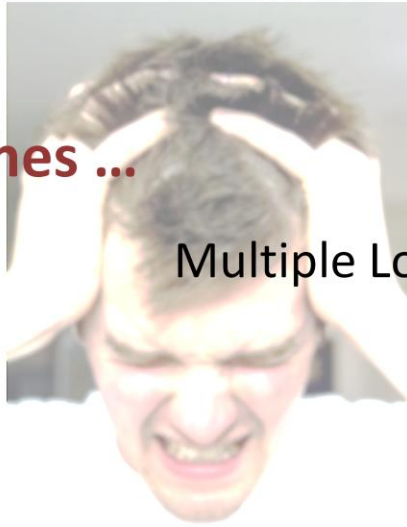
Create Lists jobs run quickly. Create Lists has been revamped and uses SQL queries in Sierra, which means that your Create Lists jobs will run very quickly. No more running a list and leaving to go to lunch to let it finish.

Headaches ...

Separate Modules

All Ports in Use

No more need to load separate modules to do your work. In Millennium we have a separate module for circulation, cataloging, acquisitions, administration, etc. Certain functions are only available in particular modules. Sierra lets you access any/every function from within the same application. We can also set up "workflows" in Sierra that let you see only the functions you use.

 "All ports in use" problems should be alleviated. When Millennium gets busy, we sometimes run into "all ports in use" and people can't log in until someone else logs out. But, in Millennium, each Create Lists job takes up a port while it's running, and having multiple modules open simultaneously takes up multiple ports. Faster Create Lists and no more separate modules should make "all ports in use" a thing of the past.

Headaches ...

Multiple Logins

No more need for multiple logins. Sierra streamlines the login/authorization system. Millennium used a two-tiered system, which meant that each user needed to know two sets of usernames and passwords. In Sierra, everyone has one username and password.

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What's the plan?

Will Sierra have ... ?

Where can I find out more?

So what's the plan for the migration?

January 23rd, 2013

Final Conversion to Sierra

Downtime: ~10 AM to 6 PM

I'll start at the end and then talk about how we'll get there. If you remember nothing else from this whole session, remember this. January 23rd is the date that we'll be converting from Millennium to Sierra. That day III estimates that they will take the system down around 10 AM, and we should expect the system to be down around 8 hours. When we come back up, we'll be on Sierra.

So now let's go back and talk about the timeline leading up to this.

November 8th, 2012

Server Upgrade

Downtime: ~8 Hours

The first milestone is the server upgrade, which happens in a little over a week. A III technician is going to come on-site and install two new servers for us that we need for Sierra: an application server and a database server. Our existing Millennium instance will be copied over to the application server and will run on that until the Sierra conversion. The system will be down while this happens—one full business day, around 8 hours. The exact timeframe will depend on when the technician gets in and starts working—I'd assume around 8AM or 9AM.

During the downtime, Millennium will be completely unavailable, and that includes telnet and the WebPAC. We will continue circulating items, and the Circulation Work Group has been preparing for this. Some areas will be using the paper processes that they use whenever Millennium is down, and others will be using III's offline circulation program, which lets us check items in and out and renew them while the server is offline. If you work in a circulation capacity and aren't sure what your area will be doing during the downtime, talk to your Circ Work Group representative.

November 18th, 2012

Millennium Upgrade

Downtime: ~1-4 Hours

After the server upgrade is finished, we're actually going to need to upgrade Millennium to the latest release. We've been running 2009B and we'll need to move to 2011. This is something that III requires for Sierra—we're not just trying to make things hard on you.

We're going to do this just like the last Millennium upgrade—we're going to set up meetings with each area (via the III work groups) and go through the enhancements in version 2011. We'll find out from you what options you want activated when we upgrade.

Just like last time, we're going to try to get the upgrade itself done on a Sunday morning so that it has less effect on our patrons. The system will need to be taken down during that time and should only be down for a few hours, at the most.

Keep in mind that November 18 is the upgrade date, so very soon we will begin setting up meetings to go over the enhancements.

December 14th, 2012

Start Seeding Sierra Database

No Downtime

The next major milestone happens December 14th. At that time III will start building our Sierra database—a process they call "seeding." This will take 4-6 weeks. During this time they'll be loading the file and record information from the Millennium database into Sierra and rebuilding our indexes. The process will be automated. Data will be validated, and any data problems will be caught and cleaned up (manually if needed).

There will be no downtime associated with this and it will not cause any sort of system strain on Millennium.

Also, throughout this process the Sierra database will be kept up-to-date with changes made in Millennium. We can use Millennium normally right up until we go down on Jan 23rd without worrying that Sierra will be out of synch. That includes making changes to system codes.

January 7th, 2013

Preview Access Begins

No Downtime

Partway through seeding the database, we will have "preview access" to our Sierra system. Right now that's estimated to be January 7th, but it could be earlier.

During this period there are a few things we'll need to do.

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Preview Access

Set Up Sierra Users

Install Sierra Application

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First, we'll need to create Sierra Users. As I understand it at this point, III will actually generate Sierra users automatically for us based on our existing Millennium users, but we will need to go through and do cleanup, since Sierra users are a combination of Millennium logins and initials. For this reason, one of our tasks between now and then will be to do some auditing on Millennium logins—make sure that the correct people have the correct authorizations.

We'll also need to have Sierra installed on staff workstations in each area, including UNT Dallas.

Preview Access

Test Network Access

Preview Sierra App (Read Only)

We'll need to make sure that the Sierra applications can actually connect to the server and work out any network issues.

And, finally, staff will be able to run Sierra in a preview, read-only mode. Staff members can log in, navigate around in the system, and look at records—but any actions that would write data to the database will not work. (The buttons/icons to trigger the functions will show on the screen but will give you an error message if you try to use them.)

January 22nd, 2013

Clear Headings Report

Full Backup

The day before we go live, there are two things we'll have to make sure get done: we'll need to clear the headings report and perform a full backup.

January 23rd, 2013

Final Conversion to Sierra

Downtime: ~10 AM to 6 PM

Again, final conversion happens on January 23rd.

After the Migration …

Training

Evaluate Workflows

After the migration we'll focus on things like training, examining what opportunities we have in Sierra to make workflows more efficient,

After the Migration …

SQL/Reporting

and taking advantage of our SQL access to produce better reports.

What's Sierra?

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A lot of the questions that we've seen—both from some staff here and from people at other institutions—are some permutation of, "How will X work in Sierra?"

With just a few exceptions, the answer is almost always: it will work the same way in Sierra that it did in Millennium. To repeat III's mantra: 100% of Millennium functionality—including all Millennium products—transfers over to Sierra.

In fact, III has created a version of the Millennium client that will work with the Sierra database. This is mainly provided so that staff can transition to the new application at their own pace. During the preview period, we will work with the III work groups and with your departments to determine who wants to stick with the Millennium client for now and who wants to go ahead and use Sierra. There are three things that work sufficiently differently in Sierra that they won't work with this version of the Millennium client: Create Lists, headings reports, and global purge fines. NOTE: This is ONLY to get you through the transition, and we'll ask that everyone be using Sierra by June.

People have already asked us some really good questions about particular functions/features, and we've talked about these with our Sierra project manager at III. I wanted to share these with you really quickly, in case these are things that you're wondering about.

What About …

Character-Based / Telnet?

Music Special Collections?

First, what about the character-based/telnet interface—how will that differ in Sierra, and when is that supposed to go away completely? There is still a stripped-down version of the telnet interface in Sierra (called the "Admin Corner") that contains the functionality that they haven't yet moved into Sierra—things like system options and certain circulation settings. They will begin moving those things into Sierra starting with phase 2 of Sierra development with the intent on eventually completely removing the telnet interface.

That leads me into the next question that people in music may be thinking about right now: what about the music special collections database that contains, e.g., the WFAA/WBAP collections? It will still be available as it is now for the foreseeable future. The web interface will still be up on port 81. The telnet interface will still be available via the Millennium client that runs on top of Sierra. We will just need to make sure there is a workstation in music that's set up with the Millennium client so that you guys can continue updating that.

What About …

Patron Data Loads?

Output Vouchers / PVE?

Patron data can be imported using Data Exchange, which will transfer over as-is to Sierra, so that process won't change.

The "Output vouchers" feature will also transfer to Sierra as-is, so the PVE system should work the same way in Sierra. We will discuss this with Lib TACO before the migration to make sure.

What About …

LDAP / Single Sign-On?

Self-Checkout Stations?

LDAP functionality will work the same way in Sierra, so patrons will continue to be able to log in to the WebPAC using their EUID.

And self-checkout stations will continue to work in Sierra.

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Where can I find out more?

And finally...there are a number of resources available to us that we can look at right now. I wanted to make sure to include something in these slides about these resources if you would like to take a look. Again, we'll be making these slides available to you guys, so please don't worry about writing down the URLs.

Sierra Documentation

Videos, tutorials, manual …

http://csdirect.iii.com/sierra/

This is III's Sierra website on CS Direct. It has the Sierra knowledgebase, which contains videos, tutorials, FAQs, short articles, etc. It also has the Sierra Web Help, which is the Sierra manual.

Sierra Webinar

Sierra Desktop App Demo …

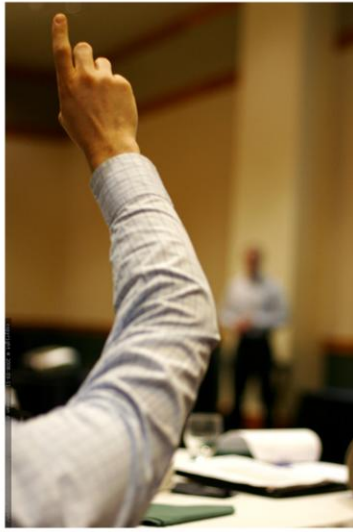http://csdirect.iii.com/downloads/20120730.html

There was a webinar that was shown back in July that had some good information about Sierra. Keep in mind that this was a few months ago, so some things might have been updated since then. The webinar includes some demos of the Sierra Desktop Application. It also includes more details about the migration process.

Sierra Listserv

Discussions, etc.

Let me know …

Finally, there is a Sierra product listserv that we can have you added to. Most of the discussion has been implementation/migration details, but—as more people come online—it's slowly switching over to more discussion about functionality/use. It's open to all staff, so if you have an interest in joining, just let me know and I'll ask that you be added.

Now Your Questions

Now let's hear from you. What questions do you have about the move to Sierra? We'll try to answer questions to the best of our knowledge, but we may need to defer to III or do some research and get back to you.