Sierra/Encore Duet Implementation

Project Timeline Overview and Issues Delivery Schedule

June 2017

(Dates accurate as of June 23, but subject to change)
Current Status

- In March, FALSC, member libraries, and Innovative agreed to extend the project timeline for one year, rescheduling the implementation to July 2018
- Innovative continues to address development issues
- All work by FALSC staff, Innovative, and library staff continues
- The Organizational Framework for the project remains in place
- The ILS Working Groups remain in place and continue to meet, review data migration and configuration, and test workflows
- In-person training of all library staff goes on as scheduled through mid-June; training webinars are being released as planned
- Refresher training is to be provided in Spring 2018 by Innovative staff
- The Systems Working Group and FALSC have begun the process for creating staff accounts and permissions in Sierra
- Our longer timeline offers the opportunity for broader system testing by library staff
- FALSC and Innovative collaborated to develop the new project timeline and schedule for issues list delivery

Ongoing Topics and Development Issues

- APIs; Patron CRUD, Patron Authentication, Fines Output, Invoice Output, Staff Authentication
- Audit Trails for Record Edits
- Authentication
- Browse Search in Encore
- Encore Duet/EDS API
- Encore Duet/EDS Discovery Comparison Webinar
- ERM functionality and Open Knowledge Base
- Local Field Display in Encore
- Log Tracking of Activities
- Mapping Display of Material Type and Status in Encore
- Mobile Encore for individual library suites
- OAI-PMH Harvesting
- Paging Options in Sierra and UBorrow
- PDA/DDA solution
- Removal of Limits to Configuration Tables
- Restricting Access to Course Reserves
- Sierra Web Application
- SIP2 Encryption for Self-Check Machines
- Support for Multiple Patron Roles
- Support of Multiple Time Zones
- Timeout Page in Encore
Development Issues: Releases

Sierra Release 3.2
(Q2 June 2017)
- Support of Multiple Time Zones
- API Functionality
  - Patron CRUD (Create, Read, Update, Delete)
  - Patron Authentication
  - Staff Authentication
  - Fines Output or Cash Transactions (non-batch)
- Audit Trails for Record Edits (back-end functionality)
- Self Harvesting Tool for OAI-PMH Harvesting

Encore 4.6.2 (June 2017)
- Mapping of Material Type and Status in Encore Display
- Mobile Encore for Individual Library Suites

Sierra Release 3.3
(Q3 September 2017)
- API Functionality
  - Invoices CRUD replicate APFeed, Acq Invoices
  - Patron Authentication against u field
  - Fines Output or Cash Transactions (batch mode)
- Audit Trails for Record Edits (front-end functionality)
  - Report available in Sierra
- ERM and Knowledge Base
  - Auto Updates from the Knowledge Base to Sierra
  - SUSHI (Standardized Usage Statistics Harvesting Initiative) and Counter Fix

Encore 4.7
(Q3 September 2017)
- Local Field Display
- Timeout page in Encore
- Limit locations in facets

Sierra Release 3.4
(Q4 December 2017)
- API Functionality
  - Fines Output or Cash Transactions, with additional fields (batch)
- Log Tracking of Activities
  - Fund Activity Report lists individual making fund transfers
Development Issues: Complete

- **Removal of Limits to Configuration Tables**
  - Available in current Sierra Release 3.1 (pTypes, iTypes, Status and Material Types)

- **SIP2 Encryption for Self-Check machines**
  - In-house testing complete; test with institutions; full implementation at Go Live

- **Encore Duet/EDS Discovery Comparison Webinar**
  - Joint presentation by Innovative and EBSCO on April 11-12, 2017
  - Recording posted on the wiki

- **Multiple Patron Roles**
  - Joint Use Working Group signed off on May 19, 2017
  - Global Patron Database meets the needs for Joint Use Facilities

- **Browse Searching**
  - Development will not be done in Encore, workaround to link to WebPac for functionality

Development Issues: Outstanding

- **Authentication**
  - In process; III Engineering working with FALSC; no significant issues identified
  - SSO Integration, LDAP Integration, LWAUTH rework
  - Transition of PLIF (patron files) to securefiles.flvc.org

- **OAI-PMH Harvesting Outstanding Requirements**
  - Thumbnail images
  - Full Encore integration; materials type icons, facets, hot-linking Author, Subject
  - Collection faceting and indexing and hot-linking of collection fields
  - Profiling and loading to include log reports

- **ERM functionality and Open Knowledge Base**
  - Additional testing needed
  - Need bi-directional updates with Full Text Finder (proposed December 2017)

- **Encore Duet/EDS API** (completed within the next several months)
  - Transfer of records from Sierra to EDS Discovery

- **Sierra Web Application**
  - Innovative will provide the plan for availability in June

- **Paging Options in Sierra**
  - Current Sierra functionality must be turned on for all requests/holds (UBorrow)
  - Workaround help prevent the holding library from displaying as a Pickup Location
  - Working with Innovative on a possible development solution

- **PDA/DDA proposed solution**
  - Use existing Sierra functionality; setup and testing under way

- **Course Reserves, Restricting Access Based on Course Registration**
  - Survey completed; meeting with Innovative on next steps
Implementation Timeline Overview

2017

Completion of Development work

Completion of Implementation Tasks

Extract and Import Data

Sierra Release Test 3.2
Encore Release 4.6.2

Pre-Prod Ver 1 start

Test of release 3.2

Feedback Loop /Corrections

Exec Review and approval to proceed

Encore Release 4.7

Sierra Release Test 3.3

Feedback Loop /Corrections

Encore Test 3.4

Test of release 3.3

Sierra Test 3.4

Completions of Planning Phase

Test of release 3.2
Implementation Timeline Overview

2018

- January: Client Readiness Review
- April: Production Go-live Schedule
- August: Go Live
- July: Phased Go Live
Issues List Delivery (Release Aligned)

- **April**: Sierra Release Test 3.2
- **May**: Encore Release 4.6.2
- **June**: Local Field Display in Encore
- **July**: Sierra Release Test 3.3
- **Aug**: Encore Release 4.7
- **Sept**: Sierra Release Test 3.4
- **Oct**: Sierra Release Test 3.4

**Support for Multiple Time Zones**

**Mobile Encore for full suites**

**Self Harvesting tool**

**API - Patron CRUD – Fines output – Staff Auth**

**PDA/DDA Solution**

**Authentication of All Environments**

**API - Patron Auth – Fines output – Invoices**

**API - Fines output all fields**

**ERM/KB – Auto Updates KB to Sierra**

**Audit Trails – Back End**

**Audit Trails – Front End**

**Log Tracking of Activities**

**Mapping – Display in Encore**

**Timeout page in Encore**

**SIP Encryptions**

**Sierra Web**