



Sierra/Encore Duet Implementation

Thank you for your hard work to launch the Sierra/Encore Duet Implementation Project. Work is progressing nicely.

Leadership Update

The Implementation Team is meeting bi-weekly to share progress and information. FALSC staff are meeting with Innovative Interfaces Incorporated (Illi) twice a week to discuss and work on the profiling configuration spreadsheets and work together to proceed with project goals.

Much of the current work is focused on preparing for the initial data load which is scheduled for release in September. This includes Illi's preparation of the production server, tweaking of the profiles for the Backstage merge of the bib records, and completion of profile sheets for data mapping and configuration.

On August 15, Illi began the initial data load on our Sierra server. The profiles are currently being reviewed with the Working Groups, as they can be adjusted for subsequent loads. The data review and profile evaluation period is tentatively scheduled for September 15-October 13.

The purpose of the initial data load is to review data and evaluate profiles for bibs, items, patrons and holdings records. The initial load will consist of all serial holdings records and approximately 8 million monographic holdings records which contain public and non-public notes. An analysis of the monographic holdings records will determine which fields/data should be retained and migrated to item records in future data loads.

Recent discussions with Illi include authentication and how PDA01 records will be managed. FALSC staff also plans to discuss with Illi how the new knowledgebase will affect the ERM and our implementation. Illi is also looking for a solution for duplicate patron id numbers. There will be an analysis of the patron records in the September data load.

Work continues on assisting libraries in completing the lengthy questionnaire from EBSCO on setting up the Encore Duet discovery interface. EBSCO is providing webinars to explain the process.

Lori Driscoll from Gulf Coast State College will represent the FCS on both the Implementation Team and Steering Committee.

The Steering Committee met on July 15. The next meeting is scheduled for September 16.

Information Technology Update

An ILS IT Contact has been identified for each institution. ILS IT Contacts can find information and updates on a new webpage for [Information Technology](#).

FLVC established the goal of having bridge software to ensure all current IT integrations at the institutions will be maintained at Go-Live (July 2017); FLVC continues to work with Illi to determine the feasibility of that goal. This includes the patron file loads which the institutions will hopefully be able to send in their current format.

FALSC is also looking at the Sierra/Encore and Illi's future roadmaps for APIs. A testing/training environment will be set up where the APIs can begin to be tested and configured. The first priority is to maintain current integrations at institutions; once that goal is assured, additional API integrations will be deployed as prioritized by membership needs. A list of ERP integrations for each school has been posted on the ILS IT Webpage and FALSC has solicited updated information about ERP from the ILS IT Contacts.

Communication Update

FALSC has hired a new Communications Coordinator, who is responsible for implementation project communications. Joni Branch will join FALSC on August 29.

The ILS Implementation Team worked with FALSC to develop the formal Communication Plan. The updated the Communications Plan will be taken to the September MCLS Meeting for review.

A new wiki for ILS Coordinators has been set up, in addition to a wiki for ILS IT Contacts. The [Implementation Wikis](#) provide a place for collaborative work and open communication among the Working Groups, FALSC staff and library staff. All interested library staff can follow the progress of the implementation via the work of the groups on the [wikis](#) and the [FALSC Implementation website](#).

(NOTE: Since there is proprietary information on the wikis, a generic password is required to view content. Access is available to staff at Florida's public higher-education institutions. Please contact your [Local ILS Coordinator](#) or the [Help Desk](#) to request login information.)

News from the Working Groups

Below is a brief update from each of the Working Groups. With the initial data load in September, the Working Groups will be focusing on data review and profile evaluation. Workflow and functionality discussions will begin after training from Illi in December. For more information, please visit the [Working Group wikis](#). If you need login information, please contact the FLVC Help Desk at (877) 506-2210 or help@flvc.org.

Acquisitions & Serials

Chair: Ernestine Holmes, FAMU

The Working Group meets biweekly. We are discussing what order records will be migrated. We are also working on material types for orders, looking at order material types and payment object codes to see if similar ones can be consolidated into a single material type. We continue to work on vendor cleanup.

Cataloging & Authorities

Chair: Annie Glerum, FSU

The team continues to identify and document questions and answers for implementation issues related to our area of work. We are also beginning to work on a survey to gather information about data-loading activities and practices of state colleges and universities. The remaining activity of the team is reviewing the database duplicate removal process of Backstage Library Works by examining the deduplication profile and post processing reports.

Circulation & Resource Sharing

Chair: LeEtta Schmidt, USF

The Circ/Resource Sharing Working Group is now working with liaisons from both the Systems Working Group and the Joint Use Working Group. The Working Group is working on two main initiatives. The first is to craft a recommendation to use a global patron database in order to take advantage of the new Resource Sharing benefits in Sierra, as opposed to a patron database that is partitioned by institution. The second is creating instructions for libraries on how to consolidate collection codes, and formulating a plan to consolidate material types.

Discovery Configuration

Chair: Allison Jai-O'Dell, UF

Members will be working with EBSCO to build their EDS accounts soon to learn more about the process and how it will work.

Discovery Interface

Chair: Alexis Carlson, IRSC

The Discovery Interface Working Group attended numerous trainings since the last newsletter. The trainings and overviews were provided by Innovative Interfaces, EBSCO and FALSC and were often joint meetings with the Discovery Configuration and ERM Working Groups. The trainings were designed to familiarize working group members with the Encore Duet and with the EBSCO products that are integrated into Encore Duet (the mega-index and link resolver) so they could make recommendations about the discovery tool as a whole. The trainings included: Review EBSCO Database Partner Questionnaire (7/12 and 7/18), Full Text Finder (7/15), Overview of Encore Duet (7/18), and Overview of Sierra ERM (7/19). The group lost one member to a job change in a different state and gained a new member, Patricia Morris of Florida Gateway College.

E-Resource Management

Chair: Tina Buck, UCF

Since the last update, the ERM Working Group has had the initial overview training session of the ERM module from Ill. The group has been working on a list of questions in preparation for future Ill training sessions. We have also continued with our overview of e-resource management activities at our respective institutions, which informs our questions and expectations of the new ERM. We have designated two liaisons to other working groups, the Discovery Interface Working Group and the Discovery Configuration Working Group, since the activities and interests of these groups are so closely interwoven. The three groups have also participated in trainings from EBSCO on the functionality of Encore with the EDS index and on the setup of the institutional profiles inside EBSCO administration.

Joint Use

Chair: Janice Henderson, NFSC

The Joint Use Working Group oversees the development of services and policies related to joint-use facilities involving the public colleges and universities. We developed a spreadsheet about our joint use facilities and have sent it to the Joint Use Discussion Group for review. Anyone involved with college or university joint use facilities or with an interest in them needs to join the Joint Use Discussion Group list (jls-joint-use-discussion) and visit the Joint Use wiki to review the information for local information accuracy.

Systems

Chair: Parker Fruehan, FGCU

The Systems Working Group has been busy becoming familiar with Access and Permissions settings in Sierra. We have also been meeting to discuss wants and needs with ERP Integration. As training clients have gone to working group members, we assisted campus IT groups to configure network settings to allow the training client access to Ill's servers. We have shared this information on the Systems Working Group wiki.

Training

Chair: Sara Alegria, Miami Dade College

All 40 institutions have submitted their Training Needs Assessment Surveys. Thank you for the 100% participation! The Training Working Group is discussing the results and will work with Schlormit Schwarzer, our Lead Trainer from Innovative, to determine the dates, locations and agendas for in-person training sessions. The plan is to have participants view a self-paced online module, if available, prior to attending the hands-on session and then provide them with a Quick Start Guide for each functionality. The Working Group is also reviewing existing documentation and online training to determine which topics need additional documentation.



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