

## INNOVATIVE CASE STUDY

When the University of Essex wanted to integrate with other university systems, library staff turned to the open, cloud-based functionality of Sierra to streamline workflows



The University of Essex has been an Innovative library partner since 1995, to help fulfill their founding vision of “a new kind of university... where students could live and learn... and research really mattered.” With an effective library management system that was well-suited for their needs, the university excelled, providing over 13,000 undergraduate and postgraduate students, more than 5,000 international students, and 2,000 faculty with an experience that led to their recognition by The National Student Survey, ranking 2nd out of all mainstream UK universities for student satisfaction in 2015.

When the head librarian retired after 33 years, the university decided the time was right to evaluate all aspects of the library: from its physical building, to the library management system and how it interacts with other systems on campus. The University of Essex determined Innovative’s next-generation solution, based in the cloud with open systems architecture, was the best solution to support their strategic plans, and they began the upgrade process to Sierra.

*“Because of our long-standing relationship with Innovative, and the value they bring as a forward-thinking library vendor, we knew we wanted to upgrade to Sierra. With Innovative’s extensive knowledge of library workflows and the details they put into their solutions, Sierra has enabled our staff to truly excel and better serve our university.”*

– Clare French, Assistant Director  
Information and User Services  
The University of Essex

### CHALLENGE: TO RAISE THE LIBRARY’S PROFILE ON CAMPUS AND EMBRACE MODERN WORKFLOWS, AMID LIBRARY STAFF RESTRUCTURING

When staff began evaluating all aspects of the library, they quickly recognised the disconnect between the library and other buildings on campus. To break the silo mentality and raise the library’s profile, it was critical for the University of Essex to integrate its library management system with other administrative departments and their registration and finance systems. This led to a conversation about procedures, how to streamline workflows, and increase efficiencies.



*“With an interface that is customised for each staff role, we see everything we need to do our jobs on one screen—and nothing that we don’t. Because of that, it really gives us the freedom to redefine our workflows to be as efficient as possible when it comes to our business operations.”*

—Caroline Checkley  
(Digital Systems and Services)  
The University of Essex

## THE CLOUD-BASED SOLUTION

It’s no surprise that IT staff are busy—especially at a large university. For Essex, the decision to move to a cloud-based solution came easily, as it meant their IT department would no longer need to support the library’s hardware or maintain their server. With a Sierra cloud-based solution, staff also gained additional space in the building, moving the equipment to an Innovative private cloud located in Dublin. Caroline Checkley, Digital Systems and Services at the University describes even greater value, “the technical support we’ve experienced with Innovative over the years has never faltered, and we trust them to manage our upgrades and ensure our applications are performing well.”

## OPEN SYSTEMS ARCHITECTURE

The open architecture of Sierra meets the growing demands of libraries, offering optimal user experiences that are personalised, collaborative, and sustainable. Utilising cloud infrastructure enables Essex staff to access their data in a shared location, and review analytics for data-driven decisions around acquisitions and collection deployment. With the robust RESTful APIs of Sierra, the Essex library now has the ability to integrate with other systems throughout the university, becoming an integral part of the faculty and user experience. With more time to focus on the services they provide, and less on manual tasks, library staff are more attentive to faculty and students in need of resources, fulfilling their university’s mission to remain committed to excellence in teaching and excellence in research.

## LOCALISED SOFTWARE SUPPORT

Based in the United Kingdom, having localised support is extremely important to the University of Essex, especially since moving to a cloud-based Sierra solution. With an Innovative office in Dublin, the library has peace of mind knowing they can speak with the support team in their same time zone. This is particularly important, as Sierra is hosted in a Tier4 security collocation facility in Dublin.

## RESULT: NEW WORKFLOW EFFICIENCIES

For the University of Essex, a key characteristic of a next-generation solution is the ability to create new workflow efficiencies for staff. Every person within the library plays a different role in the sustainability of the institution and the success of its students. This is demonstrated in the way Sierra was built, with functionality geared towards specific roles to enable better workflows across all departments in the library.

For the Essex circulation staff, they craved a mobile solution that would allow them to get out from behind the desk and assist students anywhere in the library. With the Sierra web application, now they can. The library has even implemented a roving help desk, where “rovers” patrol the library to see if anyone needs help, using tablets to access the web version of their catalogue to answer questions and issue books from the stacks. In addition to expanded web access, Sierra also offers enhanced Create Lists reporting capabilities. This allows Essex staff to quickly generate lists based on complex search strategies.

The Sierra interface is personalised for each staff role, with functions organised in a single screen to be as efficient as possible. Requiring one login, each system displays the key information necessary to support that staff person’s responsibilities, and when updates are made, the entire system reflects those changes. With all systems in one place, this saves library staff at the University of Essex a significant amount of time throughout the day. And with an intuitive interface that came naturally to the library’s staff, training was a breeze.

Innovative also brings greater efficiencies to the Essex library catalogue with the Encore Duet discovery layer. Sierra provides deep indexing and real-time collection data to power a truly comprehensive discovery experience for faculty and staff. With Encore Duet, users experience a more efficient way of searching for available resources, with an integrated results set that includes scholarly articles, books, local digital collections, and more in real time. And without having to manage record loads, library staff are even more efficient, gaining back valuable time in the day. Caroline Checkley, Digital Systems and Services at the University shares that SHE/HE thought everyone had the same experience when it comes to their discovery layer, but quickly found out that wasn’t the case. “As a long-time Innovative partner, we were under the impression this functionality was standard for all discovery layers, until we heard other libraries who were not using Innovative’s integrated discovery solution were struggling. Innovative set the expectation for real-time discovery, and we wouldn’t have it any other way.”

Just as Encore Duet enhances the end-user experience by displaying local collections and key discovery resources in one interface, so too do the RESTful APIs of Sierra to integrate library functions within the University-wide mobile application. Now, students can renew loans, search the catalogue, and reserve books right from their mobile device!

Overall, the cloud-based Sierra solution allows the University of Essex to better communicate with faculty, students, and other systems, all while becoming a more efficient, effective resource on campus.

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