Ex Libris Rosetta Implementation Methodology

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Introduction

This document provides an overview of the typical Ex Libris Rosetta implementation processes and tasks to help customers prepare for an Ex Libris Rosetta implementation project.

Ex Libris Implementation Strategy

Ex Libris teams strive for 100% customer satisfaction. We assign a project manager to guide the customer from the beginning of the project to its completion and collaborate with the library to create a mutually agreed upon plan for the project scope, roles, and timeline during the initial phase of implementation (within the timeline defined in the contract).

We take a service-oriented approach, whereby Ex Libris performs the initial configuration, data analysis, sample data loading, and other implementation tasks, based on the customer's input and data. The input is gathered using workbooks and is focused on the information required at various points throughout an implementation project. Training is generally Web-based and takes place throughout the project, as required.

Implementation Project Lifecycle

The Ex Libris implementation strategy leverages the extensive implementation experience, as well as the digital preservation experience and technical knowledge of our staff, to bring Ex Libris solutions into production efficiently and effectively.

The timeframe for Rosetta implementation can range from four months for a small implementation to six months for a large, complex institution. The project duration is defined in the contract. A high-level project plan indicating the major milestones is prepared and agreed upon by both sides. This plan serves as a commitment for the customer and Ex Libris to allocate the relevant resources, complete assigned tasks, and meet agreed upon deadlines for the implementation of Rosetta.

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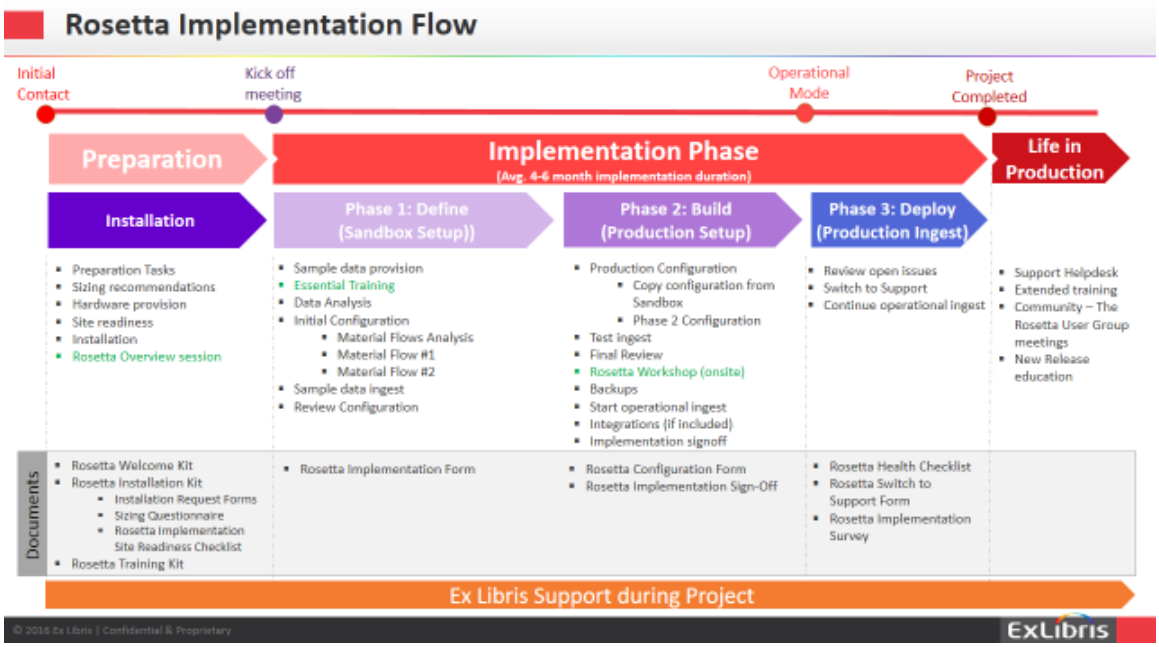
Rosetta Implementation Methodology

The implementation methodology is a framework of phases, tasks, and milestone dates based on best practices and years of Ex Libris Professional Services experience. The methodology enables repeatability, as well as the management of expectations, which are critical to the success of Rosetta implementation.



Preparing for the Implementation Project

Upon signing a contract with Ex Libris, customers receive a welcome letter that includes a product "Welcome" kit. This kit contains a series of guides, Installation kit, and getting started documents to help both library and technical (IT) staff prepare for Rosetta implementation.

In parallel, Ex Libris performs an internal statement of work and sales transition review to ensure that the implementation project team fully understands the customer's goals, requirements, and implementation scope.

During this period, both the customer and Ex Libris should identify project stakeholders and define project teams (organization planning). It is recommended that the customer use this time for an internal review of the existing workflows and data.

Local Rosetta Installation

During this period, Ex Libris issues sizing recommendations, based on the sizing form provided by the customer. The customer should than prepare the local environment for Rosetta installation and confirm the environment to be ready according to the site readiness checklist and *Rosetta Installation Guide*.

Once the environment is confirmed to be ready, Ex Libris Professional Services team coordinates a date for the Rosetta installation. Shortly thereafter, the Ex Libris implementation project manager coordinates with the customer lead to schedule the project kickoff and formally begin the project.

Implementation Phases

Ex Libris Professional Services follows an implementation approach that pairs an Ex Libris project team with a customer project team. The three phases of implementation are:

- Define (Sandbox Setup)
- Build (Production setup)
- Deploy (Production Ingest)

Project status meetings take place throughout all phases of the implementation project to help ensure progress and accuracy.

Project status calls are usually conducted between the Ex Libris project manager and the customer team project coordinator. Other project team members may participate in such calls as required.

Phase 1: Define (Sandbox Setup)

This phase starts with the kickoff meeting. A designated Ex Libris project manager (PM) partners with the customer project coordinator from the outset to define a detailed project plan and agree on major milestones.

At the kickoff meeting, the Ex Libris and the customer project team review all project stages, roles, and responsibilities and agree to a project plan that identifies how and when Ex Libris products are to be implemented. The PM and customer project team agree on a mutually satisfactory project plan and the Rosetta implementation completion date.

Toward the beginning of the Define (Sandbox Setup) phase, the customer must proceed with extracting, validating, and delivering the data from source systems for ingest to Rosetta using the defined formats, tools, and procedures provided by Ex Libris.

A Data Analysis session will be scheduled to review the sample data that was provided and to decide on the best ingest approach of the data to Rosetta.

During this period, the Ex Libris project team works on configuring the customer sandbox environment based on the customers implementation form. Once the configuration is completed, a sample data is ingested to Rosetta.

This phase is completed with the sandbox environment being configured based on customer input and a test load of the data.

Phase 2: Build (Production Setup)

In this stage, the production environment is configured based on the adjustments that were defined by the team. The customer performs test ingest, final review is done.

After all configurations are tested and approved, the customer setup backups and the production ingests are started.

During this phase, integrations are configured (if applicable), for example, integration with Primo for discovery.

This phase ends after implementation signoff is reviewed and the system is operational.

Phase 3: Deploy (Production Ingest)

During the Production Ingest phase, the customer continues ingests to Rosetta production environment, this phase will continue after switching to operational mode. Throughout the phase (1-2 months), the Ex Libris project team is available to address any issues and support the customer staff through their first steps with Rosetta in production. During this period, functional and project status calls between the customer and Ex Libris project teams will continue.

Upon conclusion of the phase, the customer is formally transitioned to the Ex Libris Customer Support team for ongoing support. The customer will continue the production ingests. The implementation project is considered complete upon the conclusion of this phase.

Life in Production: After the Implementation Project

A customer's relationship with Ex Libris does not end when your Rosetta installation begins operation. Rather, Ex Libris is committed to ensuring that a customer's needs continue to be met. Ex Libris' dedicated Support Team is available to assist customers with any product-related issues that they cannot resolve on their own. This includes self-service online help tools

as well as direct interactive assistance via the CRM for logging and receiving updates on cases submitted. The CRM can be accessed from the Ex Libris customer portal.

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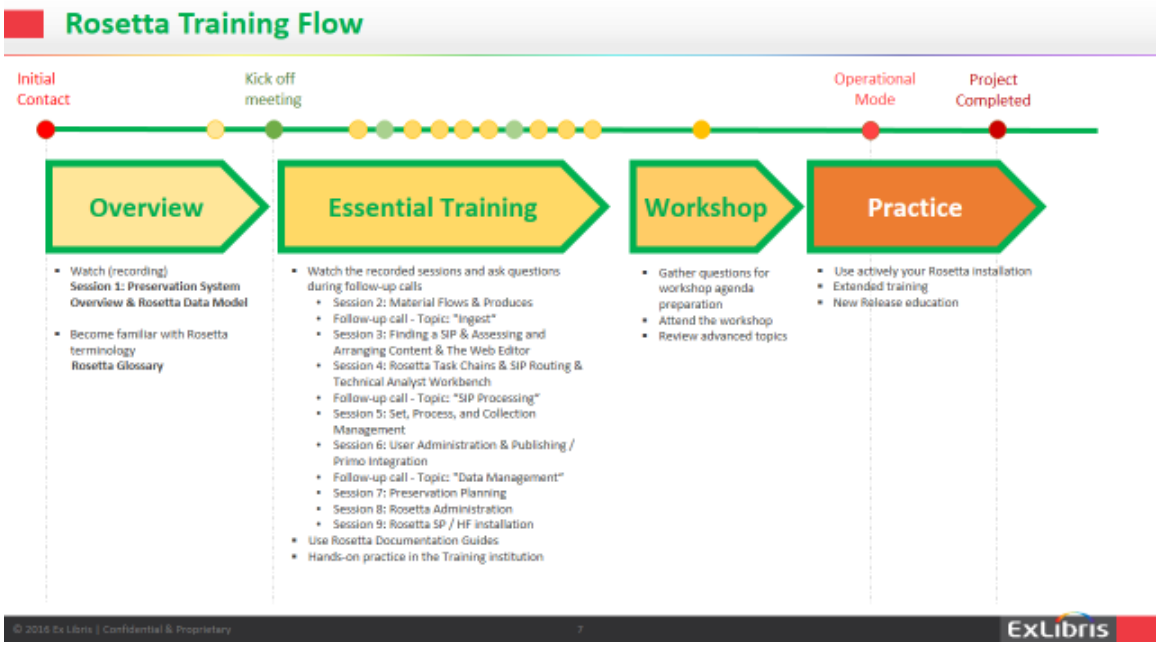
Customer Education

Training is provided throughout the entire implementation lifecycle and beyond as an integrative part of the project lifecycle. Ex Libris provides training to the core customer project team, as discussed above, in all three phases of the implementation project. Additionally, recorded sessions are available throughout all phases of the implementation project and post Go Live via the Ex Libris Knowledge Center. A significant part of the training can be done at the customer's own pace. Training is reinforced with tutorials, comprehensive user guides, and context-sensitive online help.



The Rosetta training during the implementation has two parts:

- Web based training, where the customer views online sessions followed by a review session with the project team.
- Onsite workshop that includes advanced training sessions and customer configuration of the production environment.

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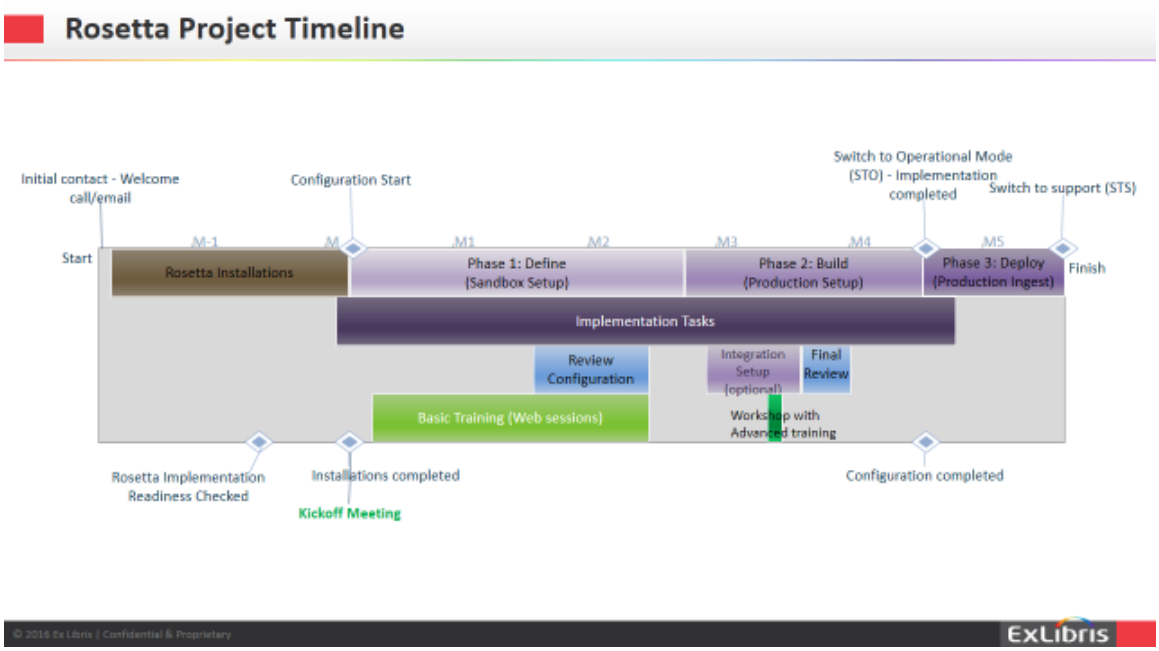
Implementation Project Details

Below are additional details of the Ex Libris implementation project.

General Project View



Project Duration

The project timeline is dependent on the following factors:

- Size and complexity of customer data
- Implementation scope
- Source systems
- Consortia implementation

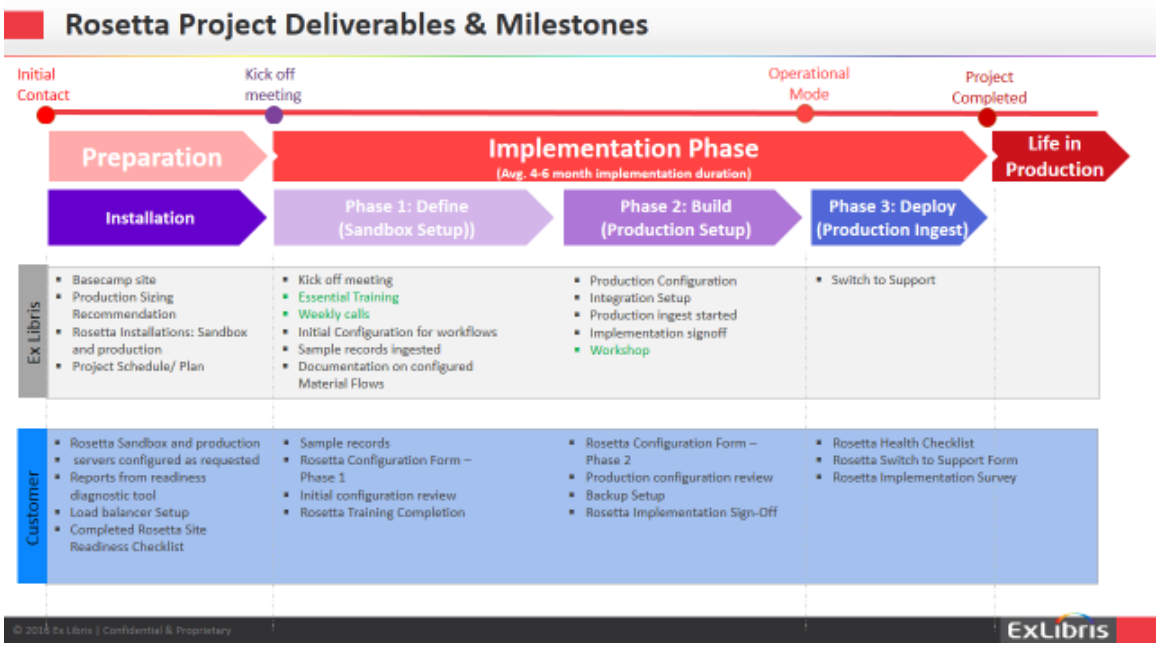
General Project Activities

Listed below are typical project activities to help customers plan and prepare for their Ex Libris project.

Phase	Milestone/Task	Customer	Ex Libris
Rosetta Installations	Test Server Hardware Sizing	V	V
	Purchase and Setup hardware [Test]	V	
	Test Server Installation		V
	Production Server Hardware Sizing	V	V
	Purchase and Setup hardware [Prod]	V	
	Set Up Load balancer (if needed)	V	
	Production Server Installation		V
	Sanity Checks / Verify installation		V
Implementation Phase : Sandbox setup	Kickoff Meeting	V	V
	Project scope, schedule, and communication plan reviewed and agreed upon	V	V
	Representative sample data provided	V	
	Material Flows Analysis	V	V
	Rosetta Core Training	V	V
	Configuration input provided	V	
	Sandbox configuration and sample data ingest		V
	Review Configuration and Data	V	V
Implementation Phase : Production setup	Configuration form finalized	V	
	Workbook phase 2 - completed & reviewed	V	V
	Configuration of Production environment sample data ingest	V	V

Phase	Milestone/Task	Customer	Ex Libris
	Test production ingest	V	
	Advanced Training/Workshop (On-site)	V	V
	Integration Setup (optional)		V
	Functional + data review and feedback - production configuration	V	V
	Backups	V	
	Start production ingest	V	V
	Implementation Sign-Off	V	
Implementation Phase : Production Ingest	Switch to Operational Mode (STO) - Implementation completed	V	
	Project closure and hand over	V	V
	Post-implementation survey	V	
	Transition from implementation to support mode	V	V

Key Project Deliverables and Milestones



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Ex Libris and Customer Project Teams and Responsibilities

This section describes the composition of the Ex Libris and Customer Project Teams and their responsibilities.

Ex Libris Project Team

The Ex Libris Implementation Team includes the following:

Role	Responsibility
Project Manager	▪ Maintain overall project plan, including schedule, scope management, risks, and issues. ▪ Monitor and report on project status and identify/manage issues. ▪ Coordinate involvement of Ex Libris resources. ▪ Communicate as outlined in the communications plan
Implementation Consultant	▪ Sample data analysis and Configuration requirements review ▪ Perform the configuration activities ▪ Deliver consulting services and implementation assistance as required to meet all project deliverables

Guidelines for the Rosetta Implementation Team – Customer Side

The customer Implementation Team should include:

Role	Responsibility
Project sponsor	▪ Interact with the project team, stakeholders (executive and senior management) and employees during the project phase. In charge on change management and sponsorship for the project. ▪ Acquires the necessary project resources ▪ Build management support and sponsorship ▪ Create awareness with employees of the business drivers and need for change
Project manager	Primary project contact: ▪ Oversees the project tasks, ensures the project adheres to budget and time frame guidelines. ▪ Manages the implementation process steps, which include setting goals, planning, and monitoring progress to completion. ▪ Manages customer project communications ▪ Executive decision maker
Rosetta System Librarian	Ongoing configuration and maintenance of the system
IT Staff	▪ Server provisioning and preparation ▪ Oracle DB / Java
Data expert/specialist	Familiar with institution's collections and their metadata
Designated preservation analyst	▪ Familiar with institution's collections and their preservation issues ▪ Decision maker for preservation-related issues
Developer (if applicable)	Develop new plugins / Submission application based on Rosetta SDK, if required by the customer