MIGRATING FROM CONSORTIALLY SHARED MILLENNIUM TO INDIVIDUALLY HOSTED SIERRA WITHOUT A SYSTEMS LIBRARIAN

Carl Danis – Collection Development/Electronic Resources Librarian

June Power – Access Services/Reference Librarian

HISTORY OF THE COASTAL LIBRARY CONSORTIUM

* Founded 1994

* Consisted of UNCP, UNCW, FSU

* UNCW hosted the server

* Governing council met several times per year

DISSOLUTION OF THE COASTAL LIBRARY CONSORTIUM

* Server was aging
* Time for a migration
* Different migration paths chosen by constituents
* Dissolved March 2014

PREPARATIONS FOR MIGRATION

* Eliminating intraconsortial holds and migrating to interlibrary loan
* Database cleanup
  + Circulation
  + Cataloging
  + Serials
  + Acquisitions
* Systems administration without a Systems Librarian

PREPARATIONS FOR MIGRATION

* Proxy
  * Access to electronic resources from off campus went through uncclc server
  * Obtain new IP address
  * Notify all necessary parties of IP change/addition
    * Still in process of notifying those who "fell through the cracks"
  * Obtain all necessary certificates (SSL/SAN)

DATABASE CLEANUP CIRCULATION-BEFORE

* Resolve intraconsortial borrowing issues
* Delete patron
* Delete fines
* Clean up holds
* Block new holds

DATABASE CLEANUP CIRCULATION-AFTER

* Create list of patrons from exiting libraries
  * Globally purge fines
  * Cancel all holds
  * Batch checking
  * Globally delete
* Update loan rules and LRDT
* Update circulation notices

DATABASE CLEANUP CATALOGING-BEFORE

* Not a lot for Cataloging before copy
* Determine suppression values for records
* Run Scope authority records

DATABASE CLEANUP CATALOGING-AFTER

* Create List of Bib Records owned by UNCW/FSU individually or collectively
  + Suppress these records
  + Try to remove as many of these records before "Go Live" date
* Create List of Bib Records owned by UNCP/UNCW/FSU
  + Remove references to UNCW/FSU before "Go Live" date

DATABASE CLEANUP SERIALS-BEFORE

- Delete Checkin Records for UNCW/FSU
- Run Claims

DATABASE CLEANUP SERIALS-AFTER

* Determine Information no longer necessary
* Delete any checkin records for UNCW/FSU that were missed earlier
* Delete Bib records owned only by UNCW/FSU individually/collectively

DATABASE CLEANUP AQUISITIONS-BEFORE

* Delete Order Records for UNCW/FSU
* Run any claims
* Post/Print fund activity report

DATABASE CLEANUP ACQUISITIONS-AFTER

* Determine information no longer necessary
* Delete order/vendor records exclusive to UNCW/FSU
* Delete fund/claim cycle codes exclusive to UNCW/FSU
* Delete bib records exclusive to UNCW/FSU

SYSTEMS ADMINISTRATION ISSUES

× "Perfect Storm"
  + UNCP "Point Person" took position elsewhere
  + Dean/Collection Development/Electronic Resources Librarian became "Point"
    × Learning as we go
  + Contracted with Innovative to have an expert available to guide us through "tough issues"

SYSTEMS ADMINISTRATION ISSUES

- Configuring Sierra
  - Authorizations for staff
    - Determining who can do what
      - Tedious and time consuming
      - Continuously refining
  - Configuring and assigning work flows

SYSTEMS ADMINISTRATION ISSUES

× Proxy
  + Access to off campus resources go through new hosted server
    × Contacting all pertinent parties of IP address changes
    × Did not get new IP until two days before scheduled migration
    × Needed to obtain all necessary certificates (SSL/SAN)
      ⋆ Campus IT did this for us

SYSTEMS ADMINISTRATION ISSUES

* Web Bridge
  + Configuring/Learning how web bridge works
  + Cleaning up data from UNCW/FSU
* Web Access Management (WAM)
  + Configuring/Learning
* OPAC configuration
  + Tweaking/Configuring
  + Cleaning up UNCW/FSU References

FROM A LOCAL SERVER TO A HOSTED SERVER

* UNCP Issues
  + New "Point People"
  + Learning how things work and fit together
  + Getting all proxy information correct
  + Cleaning up data
    * Cataloging/Circulation/Systems management
  + Lots of Help
    * Innovative
    * UNCW

ONGOING ISSUES

* Still cleaning up data
* Still discovering vendors that did not change or get new IP information
* Some cataloging issues
  + Dealing with records deleted, but still showing up
  + UNCW/FSU locations
* OPAC
  + Still some references to Consortium/UNCW/FSU

QUESTIONS?