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)
Resolve intraconsortial borrowing issues
Delete patron
Delete fines
Clean up holds
Block new holds
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
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
“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
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?