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

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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
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
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
“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”
SYSMTEMS 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
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?