

# ILLiad Migration Roadmap

This document identifies the main steps or tasks required to successfully migrate from your local ILLiad server to the OCLC ILLiad hosted service.



	Tasks	Downtime
<b>First Phase: Set-up &amp; Configuration</b>	<ol style="list-style-type: none"> <li>1. Customer completes the migration order form: <a href="https://www3.oclc.org/app/illiad/migration/">https://www3.oclc.org/app/illiad/migration/</a></li> <li>2. OCLC sends a welcome letter with URL for questionnaire: <a href="https://www3.oclc.org/app/illiad/questionnaire/">https://www3.oclc.org/app/illiad/questionnaire/</a></li> <li>3. Customer completes the questionnaire: <a href="https://www3.oclc.org/app/illiad/questionnaire/">https://www3.oclc.org/app/illiad/questionnaire/</a></li> <li>4. OCLC will review the questionnaire and e-mail three documents to the library:               <ol style="list-style-type: none"> <li>a. ILLiad pre-migration connectivity test document</li> <li>b. Migration day instructions/workflow PDF: <a href="http://www.oclc.org/us/en/support/documentation/illiad/migration/Migration_Workflow.pdf">http://www.oclc.org/us/en/support/documentation/illiad/migration/Migration_Workflow.pdf</a></li> <li>c. Library's OCLC-hosted server connection info</li> </ol> </li> </ol>	
<b>Second Phase: Connectivity Test</b>	<ol style="list-style-type: none"> <li>1. Customer completes the pre-migration connectivity test               <ol style="list-style-type: none"> <li>a. Test FTP connectivity</li> <li>b. Test ILLiad client/workstation connectivity</li> <li>c. Confirm environment settings via a conference call with your migration specialist</li> </ol> </li> <li>2. OCLC verifies pre-migration connectivity test was successful</li> <li>3. OCLC schedules migration date</li> </ol>	
<b>Third Phase: Migration Day</b>	<ol style="list-style-type: none"> <li>1. Customer completes the migration day instructions               <ol style="list-style-type: none"> <li>a. Shut down ILLiad services on your local server</li> <li>b. Transfer your ILLiad data to OCLC</li> </ol> </li> <li>2. OCLC builds your hosted server and verifies its operation</li> <li>3. OCLC CSD representative notifies customer of operational status and assists with the following:               <ol style="list-style-type: none"> <li>a. Update ILLiad BDE configuration</li> <li>b. Update SQL Server Alias Manager (if available)</li> <li>c. Local verification</li> <li>d. Update external links</li> </ol> </li> </ol>	<b>1 day</b>