



Migration Workflow

Before you begin.

- 1) You should have received via e-mail an MS-Word document titled *Your Migration Information*. If you have not already read completely through this document, please read it now. You must be familiar with your site information and its placeholder labels (i.e., <your_Web_IP>) as shown in Section III of the e-mail (see illustration below). If you have any questions, contact John Trares (614-764-5067, traresj@oclc.org) immediately.

	e) Click OK to create the backup file f) Zip the SQL backup file																												
3	Upload illiadbackup.zip and sqlbackup.zip using FTP to this site: <ul style="list-style-type: none"> •→ Server IP: <your_Web_IP> •→ Username: hosted •→ Password: <your_FTPpassword> •→ Directory: /upload/ See Section III for more information. If you need assistance, contact John Trares at traresj@oclc.org .																												
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- 2) If your site required an ODBC Link for Microsoft Access you should have previously contacted OCLC Customer Support (support@oclc.org) to request this type of access.
- 3) Your existing site must be running ILLiad 7.3. If your site is not currently on this version, contact OCLC Customer Support (support@oclc.org or 1-800-848-5800) and **do not initiate** the migration.

Migration Process.

The migration process consists of six major tasks that involve your site:

You do this...		OCLC does this...
<p>First task: Shut down local server ↓ Second task: Transfer data to OCLC ↓ <u>STOP!</u> Await notification from OCLC</p> <p>Third task: Update BDE Configuration ↓ Fourth task: Update SQL Server Alias Manager (if available) ↓ Fifth task: Local Verification ↓ Sixth task: Update External Links (links used by patrons and other libraries)</p>	<p>→</p> <p>←</p>	<p>OCLC Staff builds your hosted server and verifies its operation.</p> <p>OCLC Staff notifies your Technical Contact of operational status</p>


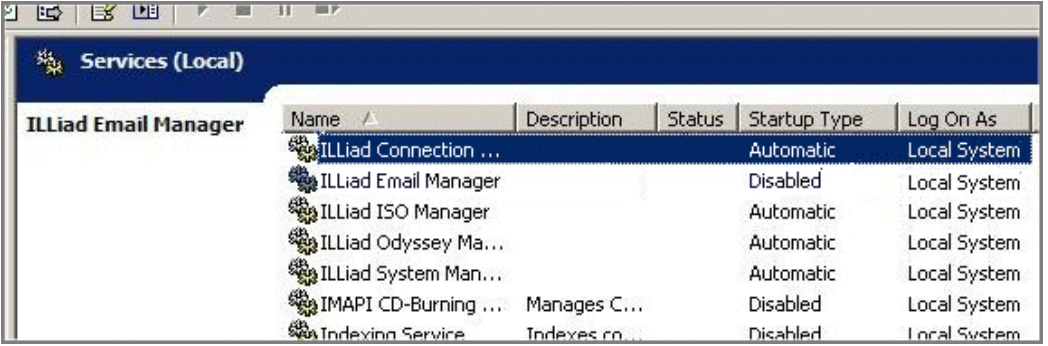
Each step is described separately on the following pages.

OCLC strongly recommends that you read through this entire document at least once before beginning the actual migration process.

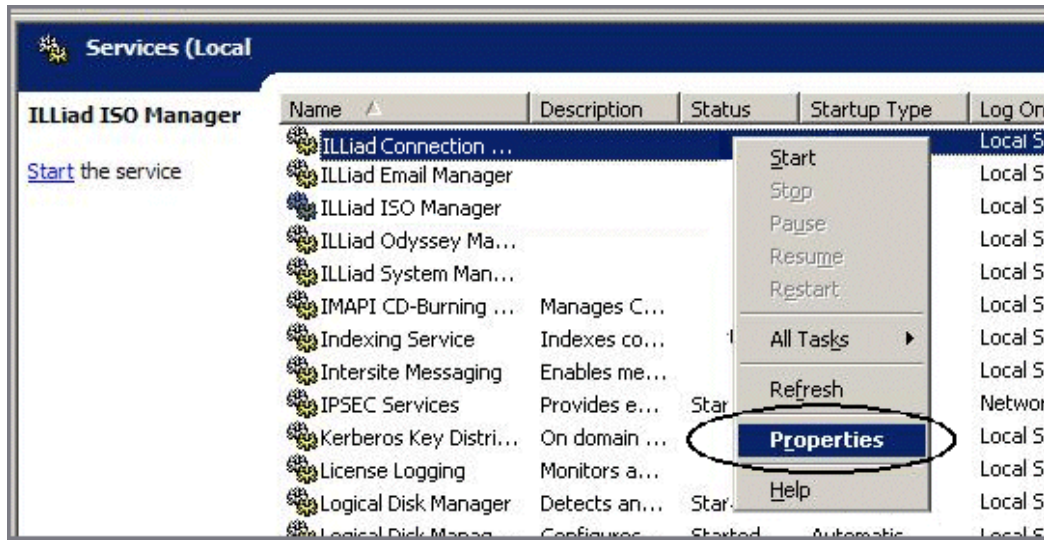
First Task: Shut down your local ILLiad server

Step	Action
1	Close all ILLiad clients to prevent abnormal termination at server shutdown. Patrons will receive a <i>Server not found</i> message during the data transfer phase of the migration.
2	Terminate access to the ILLiad Patron Web page by stopping the web server in Internet Information Services.
3	Disable all ILLiad services including: <ul style="list-style-type: none"> • ILLiad Connection Manager • ILLiad ISO Service and ISO Manager • ILLiad System Manager • ILLiad Email Manager (if present) See below for step-by-step instructions. In the ILLiad server Administrative Tools, select Services .
4	Disable access to your local ILLiad SQL database.

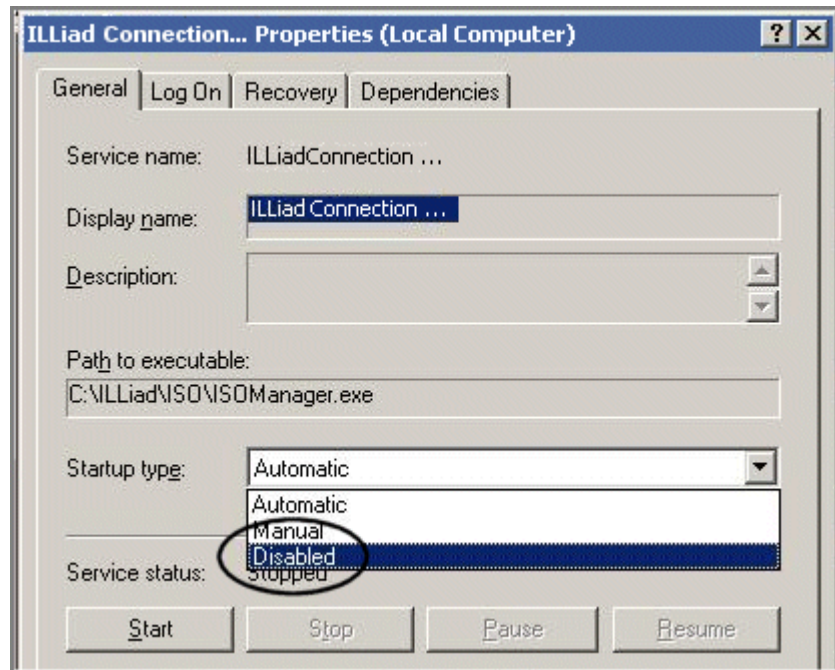
Disable all ILLiad Services

Step	Action
1	In the ILLiad server Administrative Tools, select Services . 
2	Select a service to disable. 

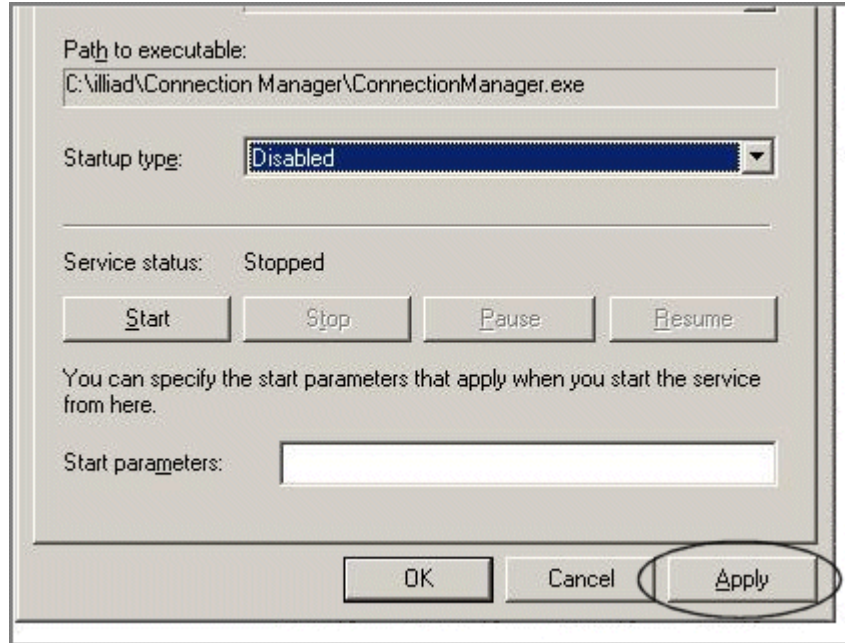
- 3 Right-click the service, then select **Properties** from the resulting menu.



- 4 Under the **General** tab of the Properties dialog box, select the down arrow at the right of the **Startup type:** field, then choose **Disabled**.



5 Select the **Apply** button.

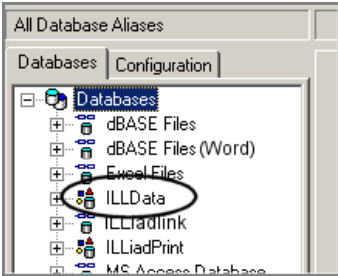
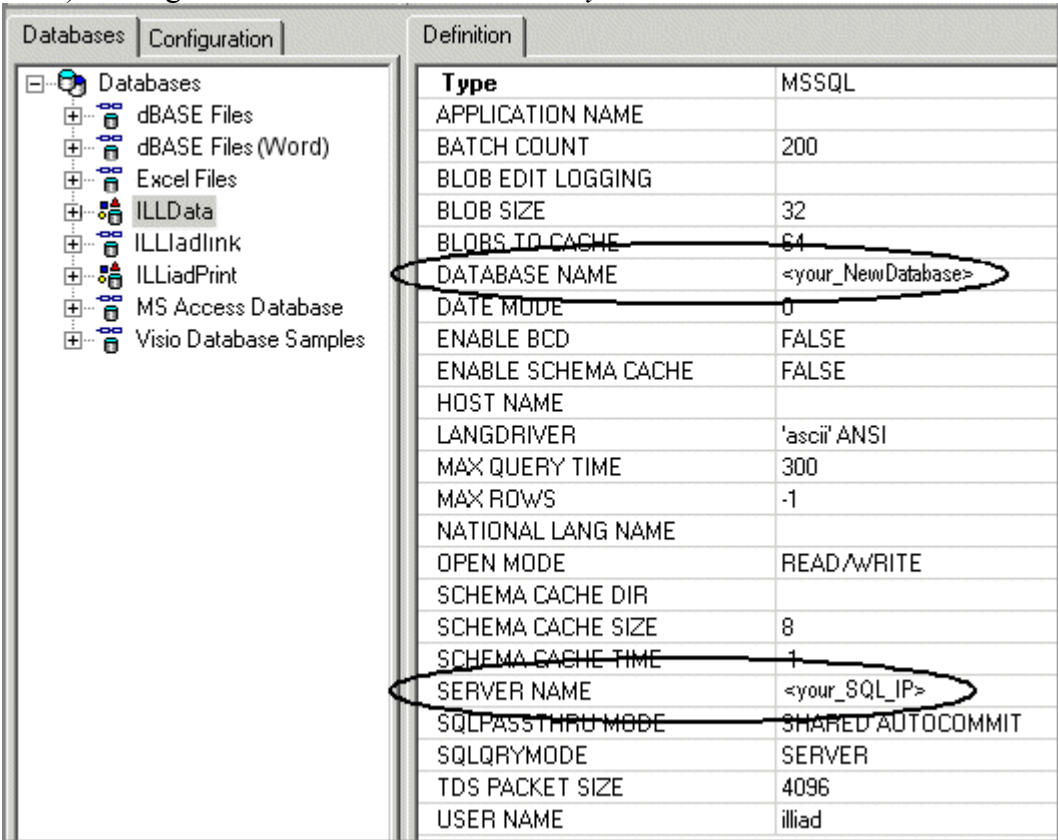


Second Task: Transfer data to OCLC

Step	Action						
1	<p>On your ILLiad Web server, zip the contents of these directories into a single zip file called illiadbackup.zip:</p> <ul style="list-style-type: none"> • C:\illiad (entire folder) • C:\inetpub\wwwroot (entire folder) <p>Note: If using Odyssey, you must include the contents of the PDF folder in illiadbackup.zip. The default location for this folder is: C:\inetpub\wwwroot\illiad\PDF, but it might be elsewhere in your system.</p>						
2	<p>Create an SQL backup file called sqlbackup.zip:</p> <p>a)</p> <table border="1" data-bbox="326 642 1276 831"> <thead> <tr> <th data-bbox="326 642 620 684">If you are using...</th> <th data-bbox="620 642 1276 684">Do this...</th> </tr> </thead> <tbody> <tr> <td data-bbox="326 684 620 753">SQL Server 2000</td> <td data-bbox="620 684 1276 753">In Enterprise Manager, right-click the database and then choose All tasks > Backup Database</td> </tr> <tr> <td data-bbox="326 753 620 831">SQL Server 2005</td> <td data-bbox="620 753 1276 831">In SQL Server Management Studio, right-click the database and then choose Tasks > Backup</td> </tr> </tbody> </table> <p>b) In the Destination box, select the Disk option.</p> <p>c) Highlight any existing data files, then click the Remove button.</p> <p>d) Click the Add button to create the SQL backup file on the local hard drive. This file must have a .bak extension, e.g. <i>mydatabase.bak</i>.</p> <p>e) Click OK to create the backup file.</p> <p>f) Zip the SQL backup file.</p>	If you are using...	Do this...	SQL Server 2000	In Enterprise Manager, right-click the database and then choose All tasks > Backup Database	SQL Server 2005	In SQL Server Management Studio, right-click the database and then choose Tasks > Backup
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3	<p>Upload illiadbackup.zip and sqlbackup.zip using FTP to this site:</p> <ul style="list-style-type: none"> • Server IP: <i><your_Web_IP></i> • Username: hosted • Password: <i><your_FTPpassword></i> • Directory: /upload/ <p>See Section III of <i>Your Migration Information</i> for <i><your_xxx></i> values. If you need assistance, contact support@oclc.org or 1-800-848-5800.</p>						
4	<p>Upon completion of the upload, send an e-mail to: support@oclc.org with this subject line:</p> <p><i><your_institution></i> - ILLiad hosted data transmitted (<i><your_SRnumber></i>)</p>						
5	<p>STOP! OCLC Server Administration staff will process your data, rebuild your server, and work with Customer Support staff to verify that your hosted ILLiad server is in working order and that patron access is restored.</p> <p>Take no further action until a Customer Support staff member informs the individual named as your Technical Contact (see Section II of <i>Your Migration Information</i>) that you can proceed with the remainder of the migration.</p>						

Third Task: Update BDE Configuration

In each workstation running the ILLiad Client, you must update the BDE component to the new IP address of your SQL server at OCLC: <your_SQL_IP>.

Step	Action
1	Access the BDE Administrator (see below).
2	In the left pane select the Databases tab.
3	<p>In the database list, SINGLE CLICK the ILLData entry to populate the right pane.</p>  <p>Note: If a <i>Database Login</i> window appears, you have double-clicked. Select Cancel to close the window. If the Definition area is not now populated, single-click ILLData.</p>
4	<p>In the right pane:</p> <ol style="list-style-type: none"> 1) Change the Server Name field to the IP of your new SQL server at OCLC: <your_SQL_IP> 2) Change the Database Name field to: <your_NewDatabase> 
5	To save your changes, in the Menu bar click: Object > Save As... and accept the default name ILLData .

Third Task (continued)

Access the BDE Administrator.

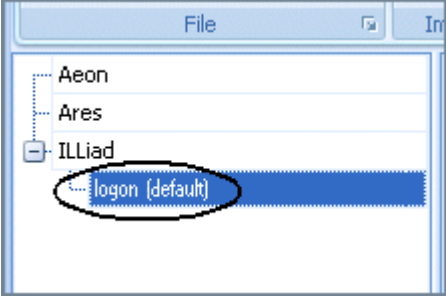
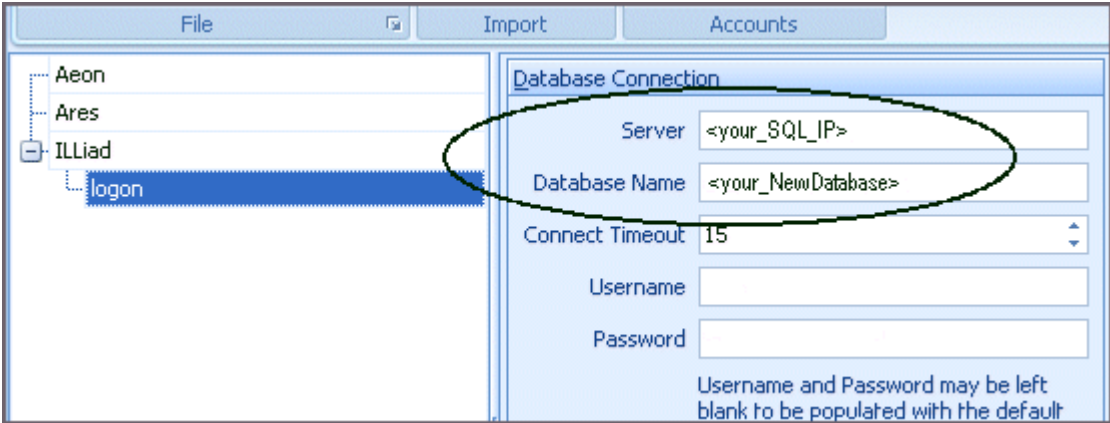
You can access the administrator two ways:

- Start Menu: Click the following: **Start > Programs > ILLiad > Networking > BDE Administrator**
- Control Panel: Click the following: **Start > Settings > Control Panel > BDE Administrator**

Fourth Task: Update SQL Server Alias Manager


Before you begin. You must have SQL Alias Manager loaded on your Workstation to perform this step.

See: <http://www.atlas-sys.com/ILLiad73Update/ILLiad73Update-StepbyStep.pdf> for Atlas Systems, Inc. installation instructions.

Step	Action
1	Open the Atlas SQL Alias Manager (see below).
2	<p>In the left pane, expand ILLiad by clicking the + then click logon (default).</p>  <p>Result: The Database Connection pane is populated.</p>
3	<p>Update the Server field to: <i><your_SQL_IP></i>, and the Database Name field to: <i><your_NewDatabase></i>.</p> 
4	Optional. Enter/update the Connect Timeout , Username , and Password fields.
5	Save these settings using the icon in the File area of the toolbar.

Access the SQL Alias Manager.

You can access the Alias Manager two ways:

- Desktop: Desktop Icon 
- Start Menu: Click the following: **Start > Programs > Atlas Systems Inc. > Atlas SQL Alias Manager**

Fifth Task: Local Verification

Before you begin: For shared server sites, **each site** should perform the following.

Step	Action
1	Verify that the ILLiad Client on each workstation can log on.
2	Verify that at least one ILLiad Client workstation can access Web pages via a browser.
3	If you have hard-coded your site’s URL in the following documents: <ul style="list-style-type: none"> • Word documents and templates • E-mail templates • Any other files that contain hard-coded URLs edit them to use the new OCLC-hosted site URL: <your_URL> and save.
4	Verify that you can log on to the following ILLiad programs: <ul style="list-style-type: none"> • Customization Manager (if present) • User Manager • Billing Manager (if present)
5	Using the FTP program of your choice, FTP to your OCLC-hosted web server and view any Web or custom reports.
6	Verify that OpenURL functions correctly (if used).
7	In all cases, make sure that your library IT staff does NOT re-start your old self-hosted server unless all ILLiad services on that server are <u>disabled</u>.

Sixth Task: Update External Links

You need to update or redirect links used by patrons and other libraries. You must replace your current ILLiad server URL with the new URL: <your_URL>. Review each of the following:

- 1) Odyssey: Odyssey is updated automatically in Customization Manager.
- 2) ISO ILL: Notify borrower/lender libraries of your new address:
<your_URL>:nnnn where nnnn is the port number. Your old address will automatically forward if you were using the full DNS name (xxx.illiad.edu:nnnn).
- 3) OpenURL: Update or redirect to : <your_URL>.
- 4) OCLC information sources such as:
 - WorldCat Registry
 - Policies DirectoryIf you are a shared server, use <your_URL>/nnn, where nnn is your site code.
- 5) Internal library Web links: update or redirect to: <your_URL>.
- 6) User access: Add text to your library's home page (and other pages as necessary) notifying your users to update their access bookmarks to:
http://<your_URL>/illiad/logon.html.

Note: If using SSL, replace http:// with https://.