Contributed Column: From the Field

From Inherited Systems to Strategic Decisions

Leading a Server Migration as a New Department Head

Garrett Griffith

ABSTRACT

The author examines the migration of Indiana University Libraries' interlibrary loan platform, ILLiad, from a locally-hosted server to OCLC hosting through the perspective of a new department head inheriting this critical technology decision. He explores how staffing changes, lost institutional knowledge, recurring system instability, and limited technical capacity prompted a reassessment of long-standing local practices. The piece outlines research, consortium consultation, approval processes, implementation challenges, authentication and workflow issues, and post-migration tradeoffs. Ultimately, the author offers practical guidance for new leaders tasked with managing inherited systems, vendor relationships, imperfect information, and strategic change in complex academic library environments.

INTRODUCTION

Indiana University Bloomington (IU), established in 1820, is a large, public R1 research university comprising 10,000 staff and over 48,000 students. Our department, Document Delivery Services, provides access to materials from the collections of IU Libraries and from collections around the world, fulfilling upwards of 30,000 interlibrary loan requests annually across lending and borrowing. Three months into my first faculty appointment as a visiting librarian and Head of Resource Sharing, I inherited a critical decision: migrate our self-hosted ILLiad server to OCLC's hosting service or maintain the status quo with dwindling technical expertise. ILLiad is the platform we utilize to process all interlibrary loan requests, and any changes or disruption impacts our services in a meaningful way. Changes to ILLiad must be carefully considered.

My predecessor held the position for over four decades, and upon their retirement, our lending supervisor had also parted ways with the department, creating a significant institutional knowledge gap. Equally concerning, our network and software analyst, the libraries' primary contact for resolving ILLiad issues — from printing and add-ons to generating statistics through SQL database queries and server troubleshooting — was approaching retirement. We had no suitable backup due to budget constraints and limited staff capacity. The server malfunctioned weekly, halting incoming requests and causing department downtime. We needed system stability and breathing room for our overstretched technology team. This column addresses assessing inherited systems, researching solutions, building institutional buy-in, navigating approval processes, troubleshooting technical problems, and lessons learned for new leaders facing similar decisions.

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ASSESSING THE INHERITED SYSTEM

I did not want to reinvent the wheel; instead, the idea was to make efficiency gains that reduced frustration, downtime, and the number of support tickets. Historically, IU has self-hosted ILLiad because it allowed custom solutions and on-site issue resolution. My initial goal was to understand the system from three angles: patron-facing, staff-facing, and server-side, including configuration settings and maintenance requirements.

Proper evaluation required multiple approaches: diving into local documentation, conversing with people holding institutional knowledge, firsthand experimentation to make connections independently, and reading ILLiad's knowledge base. This process revealed that much of our library's technical expertise rested almost entirely with one person who neared retirement. If we lost our specialist, problems would accumulate, leading to stop-gap solutions and patron frustration.

Our local server required regular maintenance, including the clearing of older records, applying patches, performing backups, and conducting security checks. We restarted services multiple times weekly to ensure that requests populated for staff processing. The real risk was accepting the status quo and hoping someone would build expertise internally to maintain the server properly. With dwindling internal resources and ongoing budget pressures, this felt like a poor choice, assuming we could commit the funds to an OCLC-hosted server.

THE RESEARCH PHASE

When researching technologies vital to operations, we looked toward consortium partners and institutions similar in scale to our own. The Big Ten Academic Alliance (BTAA) proved invaluable to us for this project. At least five members were self-hosted and five OCLC-hosted, which provided us with a good sample size. The consensus for migrating came down to more consistent uptime and improved support with fast ticket responses. We could still customize certain aspects of our workflow via ILLiad's Customization Manager and access our database through an ODBC connection in Microsoft Access for statistics.

BTAA members did cite challenges with identity management and EZproxy when migrating to an OCLC-hosted model. Many institutions noted that they lacked local IT staff familiar with managing ILLiad, and that coordinating updates and troubleshooting were far easier with OCLC than local IT. Local IT would need to focus on updating ILLiad client-side and ensure authentication worked with single sign-on but otherwise could hand off server complexities to OCLC.

During this phase, I investigated OCLC's hosting practices. What type of server and anti-virus software do they utilize? How frequent are backups, and what do they include? Do they have off-site redundancy for disaster mitigation? Can we remotely log into ILLiad software and the server when necessary? What is their transaction retention policy? OCLC would manage server-side operations, software, and troubleshooting while keeping us updated more promptly than we had managed ourselves. We would remain responsible for local client updates, but some questions still lingered. Beyond capabilities, cost mattered. Could we afford to expand our OCLC contract for both primary and satellite sites, the main library and our law library, to free up staff constraints in the face of budgetary cuts?

The tradeoff for such a migration was that we would lose custom solutions developed for collection development analysis and quality-of-life features such as billing notifications that appeared within requests once fees were paid. We would lose anything requiring write access to

the server due to security requirements. Some losses had workarounds, but other losses had to be accepted in exchange for improved update cycles and system stability. We anticipated from our BTAA conversations that authentication would be a pain point requiring months of meetings. Institutionally, IU was moving away from on-premises custom solutions toward cloud solutions requiring less maintenance and expertise. Our migration plans aligned with these goals.

BUILDING THE CASE AND NAVIGATING APPROVAL

After a more comprehensive understanding of the system and migration tradeoffs, building the case proved straightforward. We had already lost expertise through personnel changes and faced losing more with our system specialist's impending retirement. Given budget cuts and workload balance concerns, the pitch was that we should invest with OCLC to improve services and offload server-side maintenance and knowledge requirements. The argument resonated, and the migration was ultimately approved.

The lengthier process involved obtaining quotes for both sites and securing campus-level signatures beyond the libraries. The campus was restructuring billing and moving technology purchases to a different unit to comply with updated policies. We lacked signature and purchasing authority but were unsure how to route the technology request at the campus level. The purchase order was made all the more complex as the libraries already paid OCLC for many services, but this involved software and hardware on different budget lines. The library was not keen on moving OCLC contracts to the campus level when knowledge to assess the packages annually resided within the libraries.

THE MIGRATION: WHAT ACTUALLY HAPPENED

The migration timeline from research to implementation for the main site stretched from January 2024 to August 2025. It was delayed multiple times. We could not successfully restore our backed-up ILLiad database into OCLC's environment initially, and once we could, SAML authentication and SMTP integrations required extensive troubleshooting. We needed authentication to work for patron logins and SMTP for our email notifications. Fortunately, we had scheduled our migration right after spring semester ended, buying us time as delays pushed to the start of the fall semester.

The summer migration involved long email chains concerning authentication issues. We worked with local IT and OCLC to troubleshoot problems neither side initially fully understood. Connecting to our copied ILLiad database for testing between IU client-side and OCLC server-side proved challenging. While our lead IT contact was still learning ILLiad configuration, OCLC remained supportive and responsive throughout, even for anomalies they had not encountered with other institutions. Many of the issues stemmed from decades of self-hosting and the multi-layered security restrictions expected at a large university.

The lesson learned from this experience revolves around being patient with response times between teams and being vigilant to ensure issues do not slip through the cracks. Maintaining forward momentum on long-term projects is vital. Once testing environments succeeded and mirrored daily operations, we coordinated all parties through the migration itself. We established a two-day window, created website maintenance notifications, and posted downtime on OCLC's policy directory, which ensured patrons were aware of service disruption. Thanks to extensive pre-migration trial and error, the migration itself proceeded smoothly and on schedule.

Post-migration realities emerged over subsequent weeks. During the first week, requests populated slowly with general sluggishness throughout ILLiad. This problem resolved itself by the

end of week two. Proxy complications and email restrictions needed individual attention, traced to campus policies that required additional input from other campus units. The lack of write access and lost custom solutions disrupted typical workflows for collecting statistics and tracking information. Losing flexibility, functionality, and direct control was tolerable given the stability and support gained. We worked around these new restrictions and moved past some custom solutions. While the timeline stretched longer than anticipated, this is the nature of technical complexity at our scale. Eight months later, we would still choose OCLC hosting, given the stability that we have experienced.

ONGOING WORK: THE LAW LIBRARY SATELLITE SITE

Beyond migrating the main interlibrary loan site, we are onboarding our law library to ILLiad. Migration was not one-and-done but an ongoing project aligning IU Libraries with similar tools, procedures, and workflows. This change will streamline request routing and processing, providing consistent patron experiences.

Client-side installations, configurations, and workflow adaptations are currently in progress, but SAML authentication issues resurfaced. A bug in the SAML module from Atlas Systems, the developers of ILLiad, prevented SAML configuration on the web server for patron pages, impacting registration and authentication. Alternative schemes like LDAP required significant approval, as IP ranges were locked down university wide. To address the bug, we recently completed work with Atlas to beta test an update with a patched SAML module, and now the law library's authentication is working as expected. This ongoing work demonstrates how a project of this scope, even though it is not a bleeding-edge innovation, continues to require planning and execution over an extended period. Despite obstacles, the notable additional benefit is deeper system and institutional knowledge of all parties involved.

LESSONS LEARNED AND PRACTICAL GUIDANCE

After working through this project for two years as a new department head, I'll offer some practical guidance: do thorough research, as things will go sideways, particularly with technical implementations that involve multiple teams. Read knowledge bases, talk to consortium partners, review articles about similar work, and understand what you are gaining and losing. Work to understand the true costs, considering the hosting cost, plus staff time invested or saved over the long term. Does your service benefit enough from transitioning systems? Learn to accept imperfect information. Even after researching and considering angles, you will not know everything; we certainly did not. Sometimes making the best-informed decision possible with available information is what is required. Plan for the unexpected, because technical issues will emerge that no one anticipated. You and your team must persist through obstacles without full expertise. As a new leader, build institutional patience, since working through obstacles and university processes takes time. Do not lose sight of why optimization is important; in our case, instability and reduced staffing capacity outranked system flexibility. Lastly, gaining experience managing vendor relationships is crucial. For any large-scale project, your ability to successfully manage such relationships will develop out of necessity. Email chains and meetings are constant, but everyone is moving toward the same goal.

CONCLUSIONS

This project felt workable from the onset, but as I was new to many of the processes, it required a structured approach. When I began researching, I was entirely new to ILLiad's deeper workings and had significant knowledge gaps. When inheriting established systems, mechanics are elusive

until external situations require configuration edits. Certain connections are seen only when actively solving issues or aiming for specific goals. For this project, developing technical expertise to coordinate others was of high importance. I encourage anyone new to their position to thoughtfully assess systems and make improvements despite an imperfect understanding. Sometimes the right decision solves the most pressing problem, and as it creates new issues to resolve, more is learned about how the pieces fit together.