

NISO Content Platform Migration Working Group Update

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Agenda



- Background
- Working Group Overview
- Deliverables
- Examples
- Next Steps

What is a content platform migration?

- Not be confused with journal transferring between publishers
- When a corpus of content moves to a new platform
- Old platform is usually decommissioned
- Requires action on part of different stakeholders (platform vendors, publishers, librarians, library technology)



So Many Migrations

Publishers:

1 every 5-10 years

Content Platform Vendors:

5-10 per year

Librarians:

10+ per year and growing
(librarians reported over 30 content
platforms migrated from 2016 to 2019.)



The CPM Work Group, Reporting to NISO IPA Task Force

- Athena Hoeppepner (UCF) and Kim Steinle (Duke U Press), co-chairs
- Group includes members from libraries, platform and content vendors, publishers.
- Met regularly to:
 - ✓ Draft Work Item and Project timeline
 - ✓ Divide information gathering/share findings
 - ✓ **Write the Recommended Practice**
 - ✓ Plan communication and outreach



The Work Item

Develop a *recommended practice* to help *standardize the processes* and provide recommendations to *improve communications* before, during and after migrations.



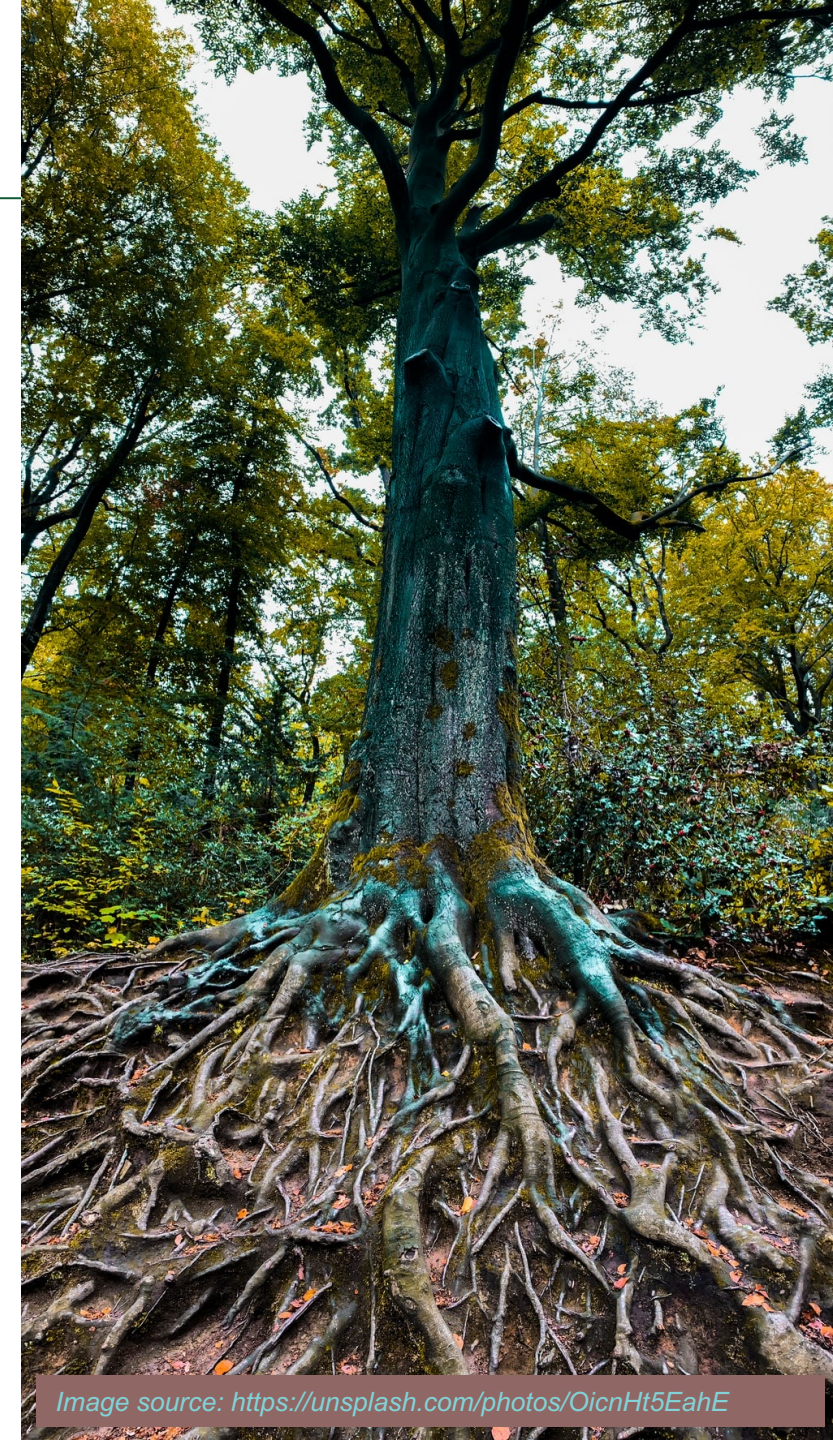
So Many Stakeholders

- Identify Stakeholder Perspectives and Experiences:
 - ✓ Publishers
 - ✓ Content platform providers
 - ✓ Libraries
 - ✓ Other technology providers
- Interviews and Surveys
- Review past migration vendor communications and checklists
- Review past migration plans, timelines, cycles , decisions



Related Standards and Organizations

- TRANSFER Code of Practice
- KBART/KBART Automation
- DOI/CrossRef
- Authentication
- Usage (COUNTER & SUSHI)



Deliverables

- Recommendations
- Checklists for publishers, vendors, librarians
- Glossary of key terms
- Incorporated feedback from public comment draft
- Link to full Recommended Practice:
<https://doi.org/10.3789/niso-rp-38-2021>



RP - Table of Contents Snapshot

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RP - Content Snapshot

NISO RP-38-202X

Section 5: User and Administration Accounts

5.1 Summary

During a migration, library staff and end user accounts need to be transferred from the previous platform, or recreated in such a way that the users and administrators retain access to key features and functionality associated with the accounts.

5.2 Library Staff Administrator Accounts

Many content platforms offer a suite of functions for library staff as account administrators. Functions could include the ability to gather usage reports; access content entitlements, KBART, and MARC files; view and modify authorized IP address ranges or other authentication information; add or modify OpenURL and external linking; add library logos and branding; customize interface options; view invoices, licenses, and accounting statements; access training; and contact customer support. Library staff consider such functionality to be key to efficient management of electronic resources, so uninterrupted access to administrator accounts is important. In a new platform, there may be new workflows and dashboards to become familiar with in order to perform these functions.

5.3 End User Accounts

End user accounts provide a variety of features, such as persistent folders with saved items, citations, and notes; interface preferences; storage of email addresses and other personal information provided by the user; connections to related accounts; and progress trackers. If possible, end user accounts, the contents of their folders and the folder structure, and other personalizations should migrate to the new platform. Library staff and end users need to know how the migration will affect user interactions with and access to the content, especially if there is the potential for loss of saved lists or content.

5.4 Recommendations for Responsibilities

5.4.1 Library Staff and Admin Accounts

5.4.1.1 Publisher Responsibilities

- 5.4.1.1.1 Specify how to connect to the library staff administration site and provide a way to create or verify necessary credentials. If possible, supply a URL that connects directly to the administration site
- 5.4.1.1.2 Indicate whether new credentials are required or if the previous credentials will continue to work, and how long the previous administration site will be available
- 5.4.1.1.3 Communicate how new passwords can be created
- 5.4.1.1.4 Describe new functionality that will be available to the library staff and provide demonstrations and training materials

Checklist Snapshot

Link to customizable checklist: <http://bit.ly/niso-cpm-checklist>.

Phase	Activity Type	Primary Stakeholder	Auxiliary Stakeholder(s)	Recommendation
Pre Migration	Communication	Publisher		Designate a contact who can provide information and answer questions on the migration to external audiences
Pre Migration	Communication	Publisher		Provide a list of key static pages that need redirection to or creation on the new platform (e.g. help, about the journal, etc.)
Pre Migration	Linking	Publisher		Provide inventory of URLs at the domain and subdomain levels that are to be migrated, redirected or otherwise handled
Pre Migration	Communication	Publisher	Librarians; Other Stakeholders	Craft your communication plan
Pre Migration	Communication	Publisher	Content Platform Vendors; Other Stakeholders	Schedule regular meetings during each migration phase (through post launch) with publishers, content platform vendors and KB vendors especially for complex migrations
Pre Migration	Metadata	Publisher	Librarians	Create a pre-migration customer entitlement list (preferably KBART) and make available to librarians for download
Pre Migration	Communication	Publisher	Other stakeholders	Communicate the platform changes to KB vendors ahead of time and involve them early in the process
Pre Migration	Communication	Publisher	Librarian	Communicate with relevant parties/customers when a platform migration is expected to happen
Pre Migration	Communication	Publisher		Consider adding language to contract with platform vendor about what happens to legacy usage statistics with platform vendor (ideally previous vendor will continue to host for a predetermined amount of time past launch)
Pre Migration	Communication	Publisher	Librarians	Consult with or create a library advisory board, who can help define the migration messaging and requisite information
Pre Migration	Communication	Publisher	Library solutions vendors	Contact statistic service vendors (such as Springshare, ScholarlyIQ) to inform them of the transitions
Pre Migration	Metadata	Publisher	Content Platform Vendor	Content analysis and review of standards
Pre Migration	Content	Publisher		Content cleanup
Pre Migration	Communication	Publisher		Create a content inventory of the backfile: counts, formats, data type definitions (DTDs), etc.

Next steps

- Formation of a **Standing Committee**
- **Support the RP** – respond to questions on interpretation or implementation
- **Publicity and Education** – create presentations and articles to raise awareness and adoption
- **Further development of RP** – determine which areas require changes to better support application and use



Questions?



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