

Lessons learned from a multi-faceted web migration project

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Agenda

- Overview of web migration project for Emory University Libraries
- Initial migration of websites to Emory Libraries domain
 - What we did and what we wish we had done
- Migration of Scholarly Communications Website
 - Differences from main websites migration
 - What we did and what we should have done
- General Lessons Learned
- Questions



Overview of web migration project

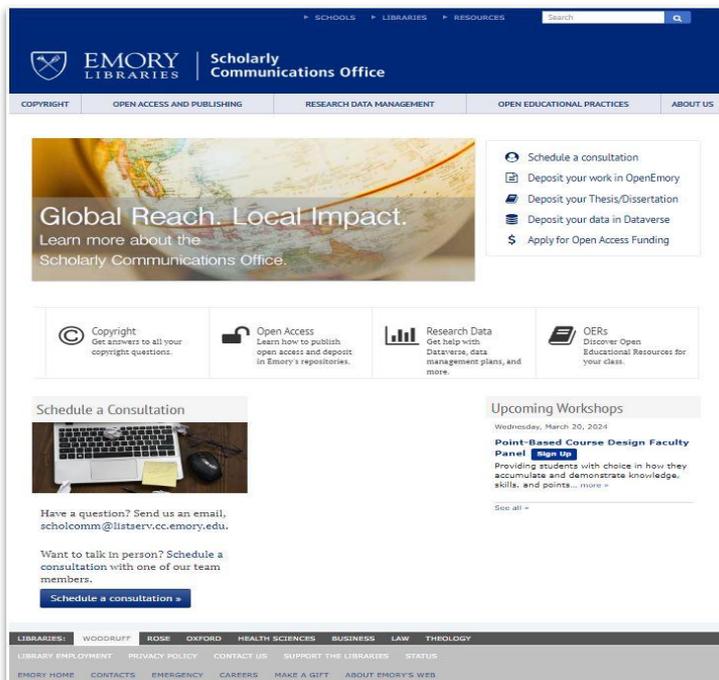
- Primary purpose was moving from Cascade Content Management System (CMS) to Drupal CMS and moving to a hosted website model (Acquia).
- Primary website (libraries.emory.edu) was essentially a “lift and shift” but individual libraries (Rose, Business, Health Sciences, and Oxford) required redesign.
- Business, Rose, and Health Sciences were moved under libraries.emory.edu domain.
- Established new content governance model with identified “Content Czars and Content SMEs” who would assume responsibility for a majority of content management.



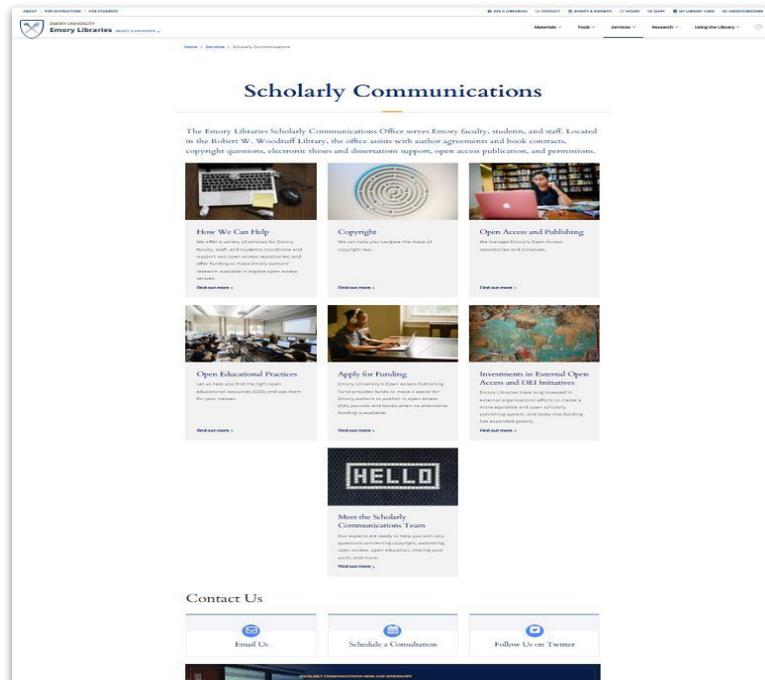
Web migration work

- Employed Acquia Professional Services for the infrastructure configuration and migration process.
- Internal front-end developer worked with Acquia to with the goal of learning the process to migrate other websites (6 remaining websites to be migrated).
- DNS changes and redirects were needed for the individual libraries.
- A new operations model was established including an operations playbook, roles and responsibilities associated with operations, and an operational level agreement.
- We should have ensured the two projects utilizing the same resources did not overlap.
- Because our front-end developer was not initially available, Acquia assumed responsibility for doing the work with no knowledge transfer.
- We should have confirmed with OIT about a week prior that they were ready for the DNS work.
- We have since learned the time needed to operationalize a new product is about 2 months, which has been built into future project timelines.

Scholarly Communications Office Web Migration Project



Old site



<https://libraries.emory.edu/services/scholarly-communications>

Project phases

PM Learning Sept.-Dec. 2022

Acquia and LinkedIn Drupal tutorials, wireframing

Planning Jan. - April 2023

Project documents - Proposal, Roadmap, work breakdown, communications, training, CHARTER...

Update SCO's page inventory spreadsheet, Identify technical questions

Learn Drupal editing from Content Guru, collaborate on page mockups/

Discuss design w/ head of SCO, identify SCO team participants

May 2023 Chartering and provisioning

May 1 -9 prepare draft

May 9 - share with key stakeholders, revise

June 1-6 Docusign signatures on charter

Acquire/set up Slack channel and Trello board

Communicate with Web Governance committee

- **Get familiar with local implementation early**
- **Survey site but find out what's on the server.**
- **Integrations need developer work? Find workarounds if you can't get that**
- **Get the charter finalized and signed as early as you can**
- **Learn a SCO member to be gone for most of the summer**
- **Trello - good tool, learned to use checklists**

Trello board

The screenshot shows a Trello workspace named "SCO Website Migration". The board is organized into columns representing stages of the migration process: "Tasks and Pages", "Assigned", "Pending", "Review, Publish and Link", "Blocked or need more links", "Final audit and link updating", "Done", and "After migration changes". A card titled "SCO 2.2.6 Finding Free and Reusable Media" is open, showing a checklist of tasks, a description, and a list of members assigned to it. The card is currently in the "Review, Publish and Link" column.

SCO 2.2.6 Finding Free and Reusable Media
In list Done

Members: BC, JT, JB, JM, +1

Labels: Published, Content page

Notifications: Watching, Jul 18, 2023 at 11:59 PM, Completed

Description

Title: Finding Free and Reusable Media

Explore:

- Deciding if You Can Use a Copyrighted Work
- Locating Copyright Owners
- Copyright Licensing Organizations
- Getting Permission to Use a Copyrighted Work
- Fair Use
- Scholarly Communications

Simple checklist 2 (100% complete)

- Migrated content; card moved to Pending
- When others linked to Using Copyrighted Works are in Pending: move the group to Review; Publish; Link column
- Reviewed; corrected if needed; Published (Jul 28, 2023)
- After others in section are also published; update Explorer links
- Link will be added to the card in Using Copyrighted Works
- Check if there are still links needed to pages that haven't been published; if so move to Blocked or Need more links
- When all links are functional; move to Final Audit column (Jul 28, 2023)
- Audited; done

Activity: Add an Item

Any team member can migrate any page or perform a followup step.

Trello checklist and comments keep track of what to do each stage and who was assigned/did it

Project phases

Kickoff and Training June 6 - 16

1 hour kickoff meeting

2 initial Drupal training sessions for SCO members with Content Guru

Content Guru sets up menu / shell page templates and team permissions Test/Production

Migrating June 16- July 31

"Lift and shift" unless revision necessary. Supply more images if needed

Copy and paste content into Drupal shell pages, set up navigation links

As pages are published, update navigation and internal page links, check content

Publishing, Announcing, Audit, Redirects, Closing Aug. 1 - 29

When all published, link to website menus

Announce changes via email, blog post

Special communications to those who link to SCO pages a lot

Redirect request met resistance because 60+ URLs to redirect.

Retrospective survey form and discussion meeting

- **1 hour Kickoff is not enough! Needed more time for communication planning/ discussion (postmortem)**
- **Drupal requires publishing a page to link to it. Last stage - furious link updating!**
- **Organizational change can impact project - Research Data content and specialist separated from SCO.**
- **Drupal update delayed "launch" 2 days.**
- **University-wide "change freeze" at start of fall semester delayed redirects implementation by about 3 weeks**
- **Need knowledge mgt and clarity around redirecting**

Recap of lessons learned

- When using vendor services for any type of work intended to be maintained by an internal group, it is important to have the internal group pair with the vendor from the beginning of the project.
- For a technology project, it is necessary for a project manager to familiarize themselves with the project technology early on, as much as possible, as this will help them identify potential issues and risks before making detailed plans.
- Prioritization of project work must be conveyed to staff frequently, especially when staff are allocated to multiple projects.
- Allow adequate time for project planning activities, including a kickoff meeting, charter review, and onboarding of project teams.
- Try to anticipate what might change - including team participants' participation, and the technology - and allow some extra time for the unexpected.

**Questions? (at end of
program)**



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