



**NISO Work Item:
Recommended Practices Around Content Platform Migrations**

**Proposal for Consideration by the NISO Voting Membership
Approval Ballot Period: November 15 – December 14, 2018**

**The following proposed work item is submitted by:
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Approved by the NISO Information Policy & Analysis Topic Committee:
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Background and Problem Statement:

As online content is primarily made available via the Web, content platforms are now a typical way to provide libraries and their patrons access to scholarly content. Content platforms may be developed by publishers themselves, or they may be licensed from third parties who specialize in this type of software. Publishers continuously work to upgrade the platforms based on feedback from customers and end-users, and in response to an ever-changing internet and technology landscape. As a result, publishers will periodically move their content from one platform to another.

With dozens/hundreds of publishers making their data available online, the platform “market” is very active. Platform migrations are happening more and more often, affecting end-users, librarians, publishers, and vendors. Librarians have reported over 30 content platforms migrated from 2016 to the present. A migration that is well planned, communicated and coordinated with customers, and well executed will deliver the content on the new platform with no broken links, no loss of functionality, no interruption in access, and no loss of customer information. However, migrations can be complex with many things to track, from customer holdings, to particularities of EZproxy and other authentication methodologies, to user accounts, and security settings. A problem free migration is the exception rather than the norm.

The goal is to create recommended practices around platform migrations which would provide a standard process and recommendations to all parties dealing with online content platforms, which would improve communication both before, during and after migration. Streamlining the process will benefit everyone in a smoother overall transition.

There are many areas in a platform migration that need attention; some examples (not inclusive) are listed below:

- There are different types of migrations:
 - migration of all content from one platform to another;
 - merging content from two or more platforms onto a new platform;
 - adding newly acquired content into an existing platform.
- Also, it is important to communicate if there is to be a hard-cut over to a new platform or dual platforms running for a set amount of time. (Will there be redirects and will those be temporary or permanent?) Communication must happen early and often, with outreach from publishers to librarians becoming more frequent as the migration is closer. A librarian checklist can be helpful to identify actions librarians must take to ensure a successful transition (pulling usage statistics from the old platform by a certain date, pulling entitlement information before the transition).

The NISO Recommended Practice, [Transfer Code of Practice](#), which offers guidelines for publishers when journals move from one publisher to another, seems very relevant to this proposal and perhaps a resource if we choose to move forward.

Statement of Work:

1. Project Goals: Improve the platform migration process by creating guidelines. Improve communication regarding platform migrations between participating parties.
2. Specific Deliverables and Objectives:
 - a. To develop recommendations on best practices for communicating about platform migrations
 - b. To develop guidelines for publishers and vendors to ensure the migration is addressing needs of librarians and end users
 - c. To develop a checklist for publishers, vendors and libraries to ensure necessary actions are taken in a timely manner
3. Process: Appoint a working group with representatives from libraries, publishers, vendors (including subscription agents, content platform providers, library discovery services) and users

Partners and Participation:

- Libraries and Institutions
 - Electronic Resource Librarians
 - Metadata Specialists
 - Reference Librarians
 - IT staff (either library or institutional IT)
- Publishers
 - Digital Strategy/IT (those working directly with the content platform provider)
 - Could be product managers and project managers
 - Marketing (for communication)
 - Customer Service
 - Library Relations/Sales
- End users
- Vendors, including
 - Subscription agents
 - Library discovery services
 - ERMS and knowledgebase providers
 - Content platform providers
 - Statistics and assessment services
 - Authentication service vendors
 - PDF lockers, bibliographic tool, and other vendors that offer end-user services for accessing library subscribed content
- NISO

Timeline:

The recommendations will be published within 18 months of the formation of the working group.

- Month 1: Appointment of working group
- Month 2: Approval of charge and initial work plan (including final determination of scope)
- Months 3-8: Completion of information gathering (phase 1)
- Months 9-11: Completion of initial draft recommended practices document (phase 2)
- Months 12-14: Public comment period
- Month 15: Responses to comments and publication of final NISO Recommended Practice (target March 2020)