Completing grant work during pandemic times

How a series of unforeseen obstacles elevated the outcomes.

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Grant Project Overview

Fedora Migration Paths and Tools: A Pilot Project

- $249,859 IMLS Funded grant over 18 months
- Focused on Fedora 3.x to 6.x migrations
- 2 pilot partner institutions:
  - University of Virginia
  - Whitman College
Grant Phases

Phase 1: Pilot Migrations

- Sept 2020 - May 2021
  - Establish project plans for each pilot
  - Document the migration & upgrade process
    - Detail metadata mapping and decision making processes
  - Develop migration tools
  - Begin draft of community toolkit
  - Test migrations

Phase 2: Validating & Improving the Toolkit

- June 2020 - Sept 2021
  - Sept 2020 - Dec 2021
    - Iterate on toolkit
    - Migration tool improvements and bug fixes in response to community usage
    - Develop training materials for migration workshop

- Oct 2021 - Feb 2022
  - Jan 2022 - Feb 2023
    - Distribute toolkit for community feedback
      - Finalize contents after feedback incorporated
    - Migration workshops

Phase : Migration Workshop
Pandemic Challenges

- Work from home orders
- Work stoppage
- Travel restrictions
- Decreased budgets
- Fear
- External concerns
- Reallocation of priorities
- Illness

Global Pandemic
Technical Challenges

● New software - front end and back end migrations
● Limitations of these new softwares
  ○ Attempting to maintain feature parody
● Using impractical hardware for testing
● Limited developer resources
● Intensive data clean up
● Learning on the fly
● Staff turnover

IslandoraCon 2022 Talk - https://youtu.be/imE2kmjh1ig
Pivot

18 month no-cost extension was granted in the summer of 2021 to finish outstanding work delayed by the factors outlined previously

- Adjust timelines to reflect remaining work
  - Requested an 18-month no-cost extension in the summer of 2021 recognizing that we would not meet our originally scheduled deadline
- Continue to hold regular check-ins with all stakeholders to stay on top of due dates and timelines
- Consider alternatives to remaining grant deliverables
  - Migration Toolkit distribution
  - In-person migration workshop
Pivot

Requested budget revision to hire an instructional designer to turn the in-person workshop material into a Migration Toolkit Instruction Manual

Surveyed the community to gauge interest in attending an in-person migration workshop

- Survey Stats:
  - Sent to Fedora, Islandora and Samvera community mailing lists
  - Received only 10 responses during a 2 month survey period

If the migration workshop were in-person would you attend?

- No 30.0%
- Depends on the location 70.0%
Migration Toolkit

Migration Toolkit Overview
Created by Christine Pascale, last modified by Arran Griffith on Feb 17, 2023

The goal of this toolkit is to provide instructional pathways to help you successfully migrate from Fedora 3.x to 6.x. Since Fedora 3.x is end of life and no longer being supported by the community, continual reliance on this version of the software will put content within them at risk.

Because of Fedora 3.x's unique flexibility, migration can be time consuming and resource intensive. To help guide you through potential steps from the migration of two pilot institutions:

- Whitman College
  - Previous system = Fedora 3.x + Islandora Legacy front end
- University of Virginia
  - Previous system = Fedora 3.x + Custom front end

We have organized these resources into this comprehensive toolkit and we hope that it can serve as your migration roadmap.

How to use this toolkit
This toolkit is organized in chronological order, from planning to completing the migration. There are some variations in each step done with Islandora or a custom front-end. To begin, start with Step 1, but you can also jump to any section as needed.

1. Understanding The Oxford Common File Layout (OCFL)
   This section introduces you to the OCFL specification, the new data standard for objects in Fedora 6.x. You will learn more about both Islandora and Custom users.
   Recommended for: Project or Program Manager, Technical Lead, or Technical Staff
   Content applicable to both Islandora and Custom:
   - Understand Oxford Common File Layout (OCFL)

2. Plan for migration
   This section focuses on putting together a project plan to manage the migration, including defining scopes and timelines, reviewing project management strategies.
   Recommended for: Project or Program Manager, Technical Lead, or Technical Staff
   Content applicable to both Islandora and Custom:
   - Create a project plan for the migration
   - Conduct a review of the current repository
   - Gather functional requirements

What We Achieved

Pros

● Digital content that is easily modifiable when things need updating
● Content that can be translated into different languages
● Accessible in any time zone
● Available to users when they need it
● Provided sample data so users can test in their own time on their own infrastructure
● Contractor/field-expert created the toolkit structure, greatly improving the UX

Cons

● Didn’t get to gather in-person and see migration testing occur live
● Missed engagement opportunity with community members
● No grant-completion celebrations 😞
Thank You

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Resources

IMLS Grant Proposal: https://www.imls.gov/grants/awarded/lg-246264-ols-20
Grant Work: https://wiki.lyrasis.org/display/FF/Fedora+Migration+Paths+and+Tools

Migration Toolkit: https://wiki.lyrasis.org/display/FF/Migration+Toolkit+Overview

Learn more about Fedora: https://fedora.lyrasis.org/
Get Connected:
  Fedora Slack - #General, #Tech, #migration channels
  Join One of Our Mailing Lists

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