

Migrating to an Open Source IR

Challenges and Lessons Learned

USM IR Day
April 29, 2016

Personal Introductions

Bryan Brown

- Web Developer
- ~2 years @ FSU
- IU grad
- @bryjbbrown

Devin Soper

- ScholComm Librarian
- ~1 year @ FSU
- UBC grad
- @devinsope



IR Migrations

- What are IR Migrations?
- What questions and challenges do they pose?
- What's been written on the subject?



2011

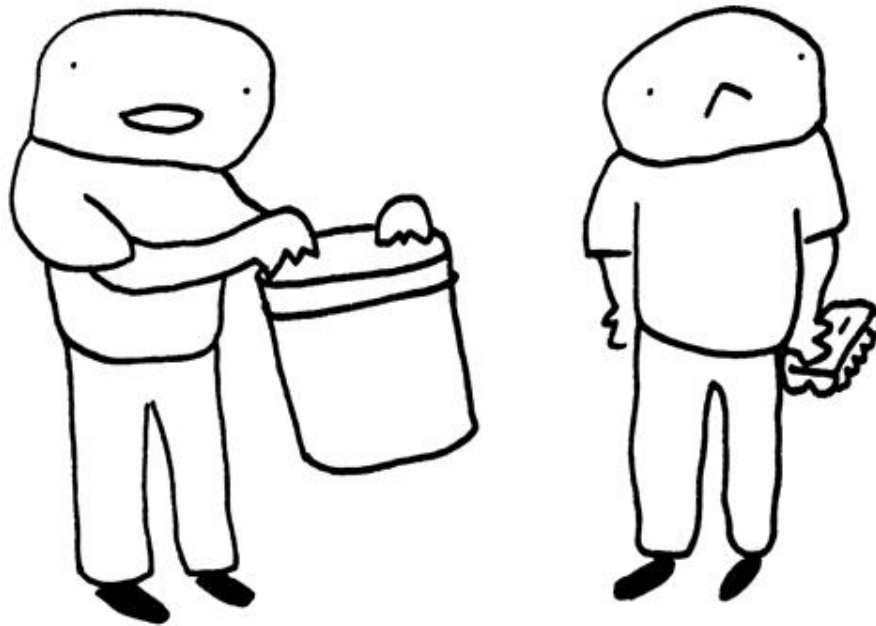
- Lack of resources
 - No developers on staff
 - Beginning of Scholcomm @ FSU
 - No OA policy (yet)
 - OA policy requires an IR
- Started “DigiNole” Commons
 - Hosted Bepress Digital Commons site
 - Annual license (\$\$\$)
 - Cheaper than a developer
 - Good choice at the time

2014

- Much more resources
 - 2 full time Drupal developers on staff
 - One new position (me) tasked with migration
 - Using Islandora for digital collections
 - Drupal-based DAMS = familiarity
 - Consortial Islandora hosting through FLVC
 - “Free” system administrators & servers!
 - FSU-FLVC Development partnership
 - Highly extensible/modular/customizable
 - Great community
 - Islandora Scholar nearing release

2014

go on, put all your
eggs in here... what's
the worst that could
happen?



2015

- Migration project begins in earnest
- Research
 - What is Islandora Scholar?
 - Can it do what Digital Commons can?
 - Would we have to build anything ourselves?
- Timelines
 - Transform records in early 2015
 - Shooting for a Fall 2015 “soft” launch
 - Full switchover at 2016

2016

- Migration complete on Jan. 6
 - Had all “required” features
 - 100% of old IR content
 - Old IR shut down
- OA Policy passed Feb. 17
 - Massive spike in faculty submissions
 - Now ~150/month from ~100/year before
 - Finding lots of bugs & bottlenecks
- Development of DigiNole’s features continue
 - Getting lots of feedback for future features
 - Transparent development process



Technology

Technology

- Transforming ~10,000 records
 - Mapping metadata transformations
 - Bepress to MODS
 - Possible enhancements & quality control
 - What can the interface do with the metadata?
 - Processing PDFs
 - Cover page stripping & replacement
 - Some PDFs were corrupt
 - Some were missing
 - Some were .docx?

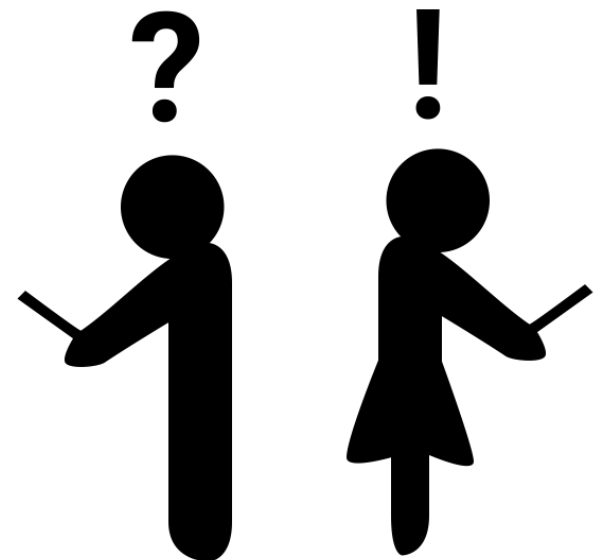
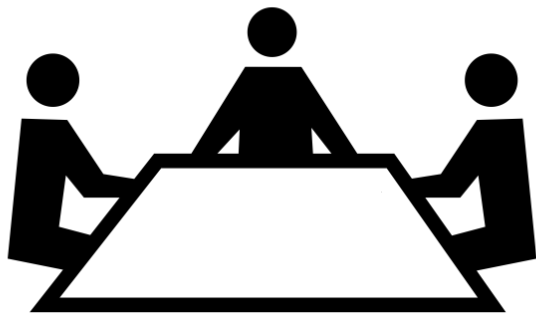
Technology

- “Missing” functionality
 - Visible usage stats
 - Monthly readership reports
- “A step to the side” (not forward, not back)
 - Have to catch up before you can pass
 - Some “missing” features still in development
 - Some brand new features in the works
 - A migration of expectations as well as data

Communication

Communication

- Between developers & non-coders
- With users and stakeholders
 - Gathering a complete set of requirements
 - Adjusting and prioritizing based on time & technical realities



Communication

- With development partners:
 - Meeting regularly, explaining needs
 - Prototyping to make decisions easy
 - Negotiating in terms of synergy & shared benefits

DigiNole: FSU'S DIGITAL REPOSITORY

SEARCH IN FSU Digital Library for Go

Home Advanced Search View All Items About Us

Florida Flambeau

Student newspaper from 1915-1965 is a window into campus life

ODK Taps Carothers; Initiates Six Others

Dr. Milton W. Carothers on the steps of the Library

SEARCH THIS COLLECTION

search


Grid view List view View All Items in this Collection

FloridaShines

FALSC Staff Resources

Services and Information for Florida's College and University Libraries

HOME STATISTICAL REPORTS PRODUCTS & SERVICES SUPPORT COMMUNITY ILS IMPLEMENTATION NEWS



Events

APRIL - MAY 2016
FALSC Regional User Meetings
Registration is now open for the FALSC Regional User meetings. Join us to learn more about the implementation of the Sierra ILS and Encore Duet discovery interface for [More Info](#)

JUNE 14, 2016
WELCOME
The Florida Academic Library Services Cooperative (FALSC) website provides information, training, tools, and other resources for Florida's college and university library staff served by the Florida Virtual Campus.

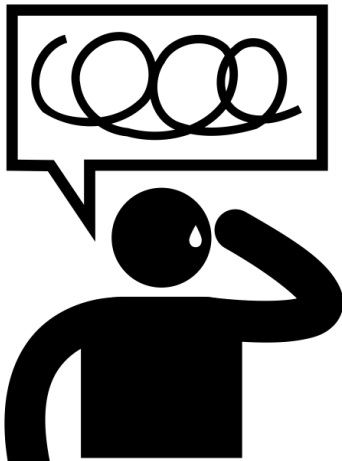
SIERRA / ENCORE DUET IMPLEMENTATION

User Experience

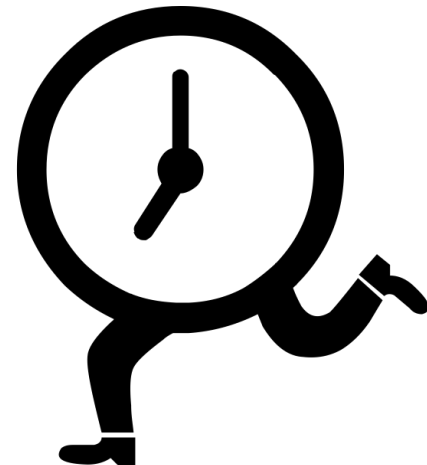
User Experience (UX)

UX testing is crucial, especially for IRs ...

It can also be tough and time consuming ...



Created by Jhun Capaya



Created by Peacock Dream

User Experience



FLORIDA STATE UNIVERSITY LIBRARIES

Institutional Repository Usability Test

Thank you for helping us test FSU's new institutional repository (IR) platform. This test should take no more than 15-20 minutes to complete, and will provide the IR development team with valuable feedback on the new repository's strengths and weaknesses.

The test covers several aspects of the new IR, from submitting items and browsing collections to the overall look and feel. In your response to each question, please note any difficulties you encountered and any suggestions you have for how the system could be improved.

Please click "Continue" at the bottom of the page to get started.

[Continue »](#)

 11% completed

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User Experience

“Jane (whom you've met; she's normally very calm) got halfway through your survey, then went out on Landis Green and kicked a puppy.”

- *iSchool faculty member*



Image by Jerry CC BY [flickr](#)

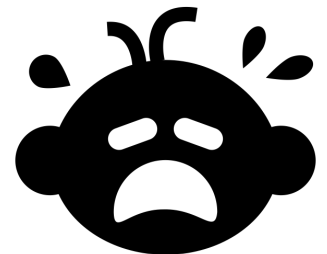
User Experience



User Experience

Lessons learned?

- UX testing is best done in person
 - lower cognitive load for the user
 - more robust and varied feedback
- UX takes time
 - plan testing well in advance
 - build in time to iterate based on feedback
- UX can be uncomfortable...
 - throw everything on the table
 - don't take things personally



Outreach

Outreach

Librarians

- Updates at public service meetings
- Intranet page with communications plan, talking points for public services staff, etc.
- Canned outreach emails for subject liaisons

Faculty authors

- Monthly author email updates
- UX testing invitations for power users
- Mailing list for author feedback



Outreach

Launch marketing & promotion

DigiNole: FSU'S DIGITAL LIBRARY AND RESEARCH REPOSITORY

Digitized resources from Special Collections & Archives and others, including unique manuscripts, photographs, pamphlets, rare books, historic maps, and other materials

Original FSU scholarship, including theses and dissertations, faculty publications, research data, teaching materials, and more



Search for digital resources using our new, **unified software platform.**



Check out our Digital Library exhibit in Strozier Library celebrating the launch of DigiNole, starting **February 29**

DIGINOLE.LIB.FSU.EDU

Outreach

DigiNole:

FSU'S DIGITAL LIBRARY
AND RESEARCH REPOSITORY

DIGINOLE.LIB.FSU.EDU

BACK TO NEWS HOME PAGE SEARCH FLORIDA STATE Florida State 24/7 Search GO



FLORIDA STATE 24/7

THE NEWS SITE OF FLORIDA STATE UNIVERSITY

More FSU News Watch and Listen Experts For Reporters Social Media

FRIDAY, APRIL 8, 2016

University Libraries launch Diginole: FSU's digital library and research repository

Devin Galetta



02/29/2016 11:42 am



University Libraries are proud to announce the launch of DigiNole, Florida State University's unified platform for FSU-created and maintained digital resources. DigiNole will enable users' seamless access to a range of materials through two portals including the Digital Library and the Research Repository.

The Research Repository provides a platform for scholars to share the products of their research and creative output. Members of the FSU community are encouraged to submit their work to the repository, which can significantly increase citation impact and public engagement via search engines like Google Scholar.

Additionally, authors also receive monthly readership reports with detailed statistics that can be used to help demonstrate the impact of their research.

"I have been using the Research Repository for several years. It has made it easier for other researchers and practitioners to access my work," said Dr. Jim Sampson, Associate Dean for Faculty Development and Professor at FSU's College of Education.

FLORIDA STATE UNIVERSITY LIBRARIES
PRESENTS

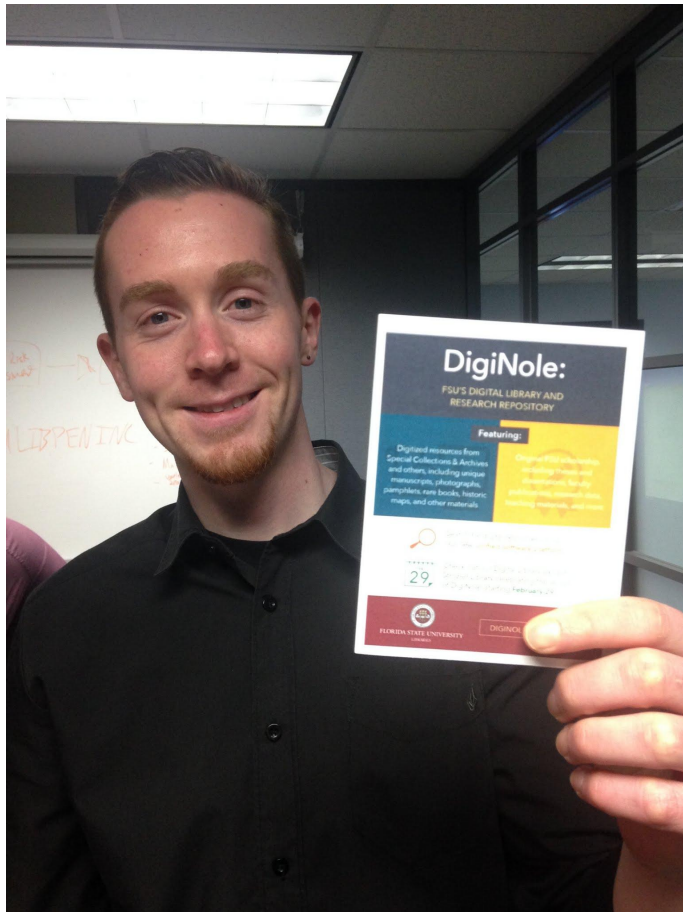
WHAT'S PAST is PIXELS

DEVELOPING THE FSU
DIGITAL LIBRARY

DIGINOLE.LIB.FSU.EDU

FEB 29 - APR 8
MON-FRI: 10AM-6PM

Outreach



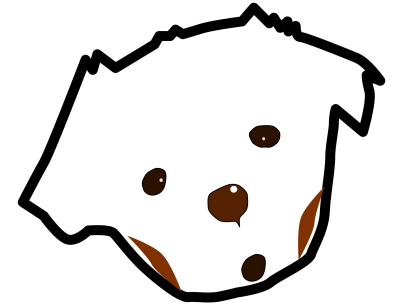
Lessons Learned

Lessons Learned

- When migrating, take inventory of your records
 - Do you have all the files you think you do?
 - How many are duplicates? stub records? corrupt?
 - How many have incorrect metadata?
- Migration is a good time for metadata enrichment*
 - Shoot for the low hanging fruit
 - Be careful of metadata perfectionism
 - Will this enhancement affect our timelines?
 - Could this be a post-migration cleanup project?
 - Done is better than perfect

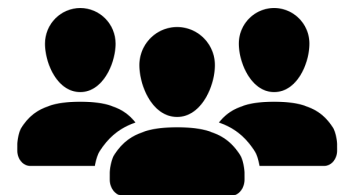
Lessons Learned

- Open Source Software: free as in puppies
 - Requires setup, maintenance
 - Works best with developers on staff
 - Works best when involved with community
 - Might be more expensive than a hosted IR
 - Feeling of ownership & continual improvements
- Being a good OSS citizen
 - Expect bugs
 - Fix what you can & share your work
 - Guide the future of the project



Lessons Learned

- Know your users!
 - Who are your users? How do they use the system? What tasks do they perform? What do they like about the current system? What could be better?
- Know your stakeholders!
 - Who has the power to make your migration successful (and, equally, to hold things up)?
 - How might changes to the system impact their policies/procedures/workflows?



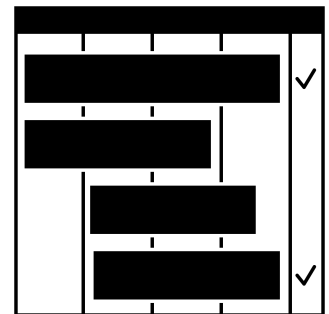
Lessons Learned

- Know your communications channels!
 - What are the best ways to communicate with your users and stakeholders?
 - How can you involve them in the process and make it easy for them to provide feedback?
 - How can you use the migration to get the word out and grow your user base?



Lessons Learned

- Have a communications plan!
 - Map out your stakeholders (and requirements), preferred comms channels, outreach assets, etc.
 - Set deadlines for specific communications
 - Share your plan with stakeholders!



Questions?

Thank you!



BY