**East Carolina University Libraries ArchivesSpace Migration  
Project Outline**

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| Document Version | Date | Author | Notes |
| 01 | 2018-06-27 | Kelly Spring | First Draft |
| 02 | 2018-07-03 | Kelly Spring | Revised Timeline |
| 03 | 2018-07-19 | Kelly Spring | Revised Tasks |
| 04 | 2018-07-25 | Kelly Spring | Revised Timeline and Tasks to include peer site evaluation and front-end development |
| 05 | 2019-10-10 | Kelly Spring | Revised Timeline and Tasks to include in-house request system development |

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# Phase 1: July-September 2018

*Form working group to plan migration and implementation. Working group will meet weekly for 50 minutes.*

* Layne Carpenter
* Alston Cobourn
* Patricia Dragon
* Martha Elmore
* Amanda McLellan
* Michael Reece
* Kelly Spring (Project Manager)
* Amanda Vinogradov

*Phase 1 tasks:*

Approve goals

* Top-level and container list information for collections in one repository
* Name and subject authorities correct
* Improve workflow for creating and posting collection guides
* Is there interest in the Public User Interface?

Approve scope

Approve project structure

* Timeline
* Communication plan
  + Choose collaborative workspace
* Assumptions, constraints, and risks

Define technical aspects

* Methodology for data extraction, cleanup, and migration. Work together to mock up several scenarios and discuss
  + Include impact analysis for each scenario
  + Revise timeline if necessary
* Methodology for continued work during transition. Work together to decide the best way for archivists, catalogers, and digital team to continue their work during the project.
* Outline data service plan
  + Backup schedule
  + Server resources

Submit findings and recommendations from Phase 1 to Jan Lewis, John Lawrence, Dale Sauter, and Marlena Barber.

# Phase 2: October 2018

Identify Resources needed or already in place

* Software
* Local policy documentation
  + Controlled vocabularies
  + Controlled fields
  + Auto Populated fields
  + Others
* Training plan
* Legacy decommission plan
* ArchivesSpace
  + Listserv
  + Help center
  + Technical support

Complete work breakdown structure

* Define roles and assign staff

*Submit findings and recommendations from Phase 2 to Jan Lewis, John Lawrence, Dale Sauter, and Marlena Barber.*

# Phase 3: November 2018 - August 2019

Research and review existing data

* Create an inventory of all data sources
* Develop crosswalks
* Decide how best to manage various data quality issues
  + Ignore
  + Fix in the source system
  + Fix during staging
  + Use code to fix during migration
  + Fix in AS
* Decide on data standards for data prep
  + Industry standards for EAD and AS
  + Local standards
* Prepare the data for migration
* Run sample migrations
* Prepare a migration fallback policy

Begin AS training for users

Begin developing local policy documentation

*Submit findings and recommendations from Phase 3 to Jan Lewis, John Lawrence, Dale Sauter, and Marlena Barber.*

# Phase 4: September 2019 – February 2020

Testing

* Run practice migrations with the full set of data.
* Evaluation
  + Check results for accuracy and functionality
  + Fix errors
  + Repeat as necessary
* Front-end development to accommodate new data

Conduct evaluation of peer websites

Complete AS training for users

Continue developing local policy documentation

*Submit findings and recommendations from Phase 4 to Jan Lewis, John Lawrence, Dale Sauter, and Marlena Barber.*

# Phase 5: March 2020 – April 2020

Production

* Set up production instance
  + Include any customizations needed
* Push migration
* Quality assurance
* Further front-end development, if necessary
* Build and implement in-house archival material request system

Revise local policy documentation, if necessary

*Share results with Jan Lewis, John Lawrence, Dale Sauter, and Marlena Barber. Request celebration!*

# Phase 6: May 2020

Wiggle room allows extension to May 10, according to three-point analysis.

*Celebration!*