Project Charter

Project Name: LibGuides 2 Upgrade and Migration
Project Manager: Luke Gaudreau

Problem/Value Statement

Problem Statement

The Virtual Reference and Research Working Group has recommended upgrading and migrating from SpringShare's LibGuides v. 1 to LibGuides v.2. The upgrade will require project participants to evaluate and test the software, perform data cleanup, customize the look and feel, document best practices and provide training and outreach to staff.

Business Value

Version 2 of LibGuides offers significantly greater flexibility for the design, layout and content of their LibGuides. LibGuides 2 also offers a robust API, with the potential for reusing LibGuides data in other systems.

Vision and Approach

Describe the Solution

The Upgrade and Migration will take place in three phases.

Alpha

- Test and Evaluate Software
- Explore publishing workflows
- Create and Edit Test Guides
- Customize Group Look & Feel
- Create Guide Templates
- Work with Local LibGuides owners to clean up existing guides using the Migration Checklist for Guides.
- Complete the Pre-Migration Clean Up Checklist (LTS only)
- Write Best Practices for creating new guides
- Provide training/and or Open Meetings

Beta

- Migrate all LibGuides content
- Update guides to take advantage of new functionality
- Work with Local LibGuides owners to make sure guides are up-to date and look and work well in LibGuides2

Production

- Make LibGuides 2 default for all participating libraries

Assessment

- Review completion of deliverables
- Report on lessons learned

Deliverables/Work Products

Alpha

- Project plan
- Communication plan
- Best Practices for creating new guides documented
- Training sessions delivered
- Existing Guides cleaned up

**Beta**

- Fully migrated LibGuides instance
  - All LibGuides content migrated
  - New styles and templates applied
  - Problems identified and fixed

**Production**

- Content and appearance evaluated

**Assessment**

- Summary of Lessons Learned

**Define how to measure "done."**

**Alpha**

- LibGuides owners are ready to adapt content
- Customizations are complete
- Migrations checklists are complete

**Beta**

- Migrated content is up to date
- New LibGuides sites look and work as expected

**Production**

- LibGuides2 is reachable at production URLs
- Instructors and students can use for work
- Discoverable

**In-Scope**

- Cleanup of existing guides within the scope of Migration Checklist
- Updating of guides.library.harvard.edu homepage
- Recommendations to Portal Working Group for discoverability
- Incorporate look and feel with each Library's current website

**Out of Scope**

- Integration with other systems (Library Portal, HOLLIS+)

**Stakeholders/People**

**Who is the work being done for? (Sponsor)**

The work is sponsored by the Virtual Reference and Research Working Group

**Who is funding the work?**

TBD

**Who will accept the work?**
The Virtual Reference and Research Working Group

Who will be involved in doing the work (service area, department, etc …)?

Library Technology Services, VRRWG's LibGuides2 Project Team, Guide Owners, Local tech support

Schedule and Cost

Schedule

2015
Alpha February 10-June 15
Beta June 15-July 31
Production August 1

Cost

The project would like to offer several open meetings to introduce users to LibGuides 2 and provide base-level of training. We will require a small budget of between $325 and $375 to cover refreshments.

- Continental Breakfast or Afternoon Snacks for 40 (Lamont Forum Room) $250
- Continental Breakfast or Afternoon Snacks for 10 (Countway) $75

Other

Constraints

The primary constraint for this project will be limited resources in terms of staff time, both for Project Team members and LibGuides owners. The migration must happen for everyone simultaneously. We can't migrate some groups now and others later.

Assumptions

Users will be able to adapt their content and practices to LibGuides2. Testing and Evaluation and Developing Best Practices will help increase the likelihood the assumption is met.

Dependencies

A successful data migration must occur.

Risks

<table>
<thead>
<tr>
<th>Task</th>
<th>Risk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test and Evaluate Software</td>
<td>Poor test plan</td>
</tr>
<tr>
<td>Create, Edit and Customize Guides</td>
<td>Lack of Participation from Project Team</td>
</tr>
<tr>
<td>Clean Up Guides</td>
<td>Lack of Participation or Competing Priorities from LibGuides Owners</td>
</tr>
<tr>
<td>Migration Checklists</td>
<td>Lack of Participation from Project Team and LTS</td>
</tr>
<tr>
<td>Best Practices</td>
<td>Poor coordination from Project Team</td>
</tr>
<tr>
<td>Provide Training/Open Meetings</td>
<td>Poor coordination from Project Team</td>
</tr>
<tr>
<td>Update and Fix Guides</td>
<td>Poor coordination from Project Team, lack of participation from LibGuides owners</td>
</tr>
<tr>
<td>Take LibGuides Live</td>
<td>Poor coordination with local System Administrators</td>
</tr>
</tbody>
</table>