Migration Checklist for Guide Owners

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Cleaning up your Guides

LibGuides 2 is significantly different from LibGuides 1. Before the migration begins, you’ll need to clean up your Guides. To ensure your guides look good and act well in LibGuides 2, you’ll need to complete the steps in Required Cleanup. To take advantage of new features in LibGuides you may also want to complete some or all of the Optional Cleanup.

Required Cleanup in LibGuides v1

*These steps must be completed in LibGuides v1 before the migration. Please see the project timeline for the scheduled migration date.*

Consider using SpringShare’s Chart for Tracking Changes to keep track of anything you want to revisit post-migration.

Guides

Review all of your guides. Your Group Admin will provide a report of inactive guides. Consider removing any that are no longer used or maintained.

Boxes

Several Box types from LibGuides 2 will not be migrated. These boxes will not appear in LibGuides 2. If you still need the content, consider replacing with another box type. Your Group Admin will provide a report of expiring box types.

- Events
- Delicious
- User Submitted Links
- Feedback
- Table of Contents (consider replacing with a SideNav template post-migration)
- Survey (see below)
- LibAnswers (your Group admin will provide a replacement post-migration)

Surveys

Surveys created in LibGuides 1 will not be migrated. You will need to download survey results. Visit the surveys page, open your survey, click analyze responses, and then Export to Excel. Make note of any surveys you’d like to recreate in LibGuides 2 using the new LibSurveys app. Your Group Admin will provide a report of Libguides Surveys

Links

Fix or remove any broken or obsolete links from your guides. Your Group Admin will provide a report of broken links.

Images

Review your image library and remove anything you don’t need. Review your guides for outdated screenshots and update or remove.

Tabbed Boxes
Make note of any tabbed boxes created with the SpringShare FAQ. You can convert these to the built in Tabbed box type after migration.

**Customization**

Your group admins will be updating your group’s Look and Feel customizations for LibGuides v2. Any customizations you made to your guide’s Look and Feel in LibGuides v1 will not work in v2. Your group admin will be removing any guide-level custom CSS/JS.

Review your guides for additional customization:

- Remove special formatting from Rich text boxes.
- Avoid using tables for layout if possible. If you have created tables with a defined width in pixels, you’ll need to convert the width to percentage.

**Accessibility**

While reviewing your guides, you should check for the following to ensure that your guide is accessible to users who utilize assistive devices or who have disabilities:

**Avoid opening links in a new window**

When you click on links, they should not open in a new tab or window. By default, all links will open in the same tab, but it is possible that some guide editors may have overridden this when adding links to their guides. You can change this by highlighting the link in the editor view, clicking on the link button, and in the drop down menu that says "Target" select either "–Not Set–" or "Open Link In The Same Window".

**Add alt text to your images**

For all of your images, check to make sure that you have alternate text or "alt-text" that would allow a user who cannot see the image to understand what the image is. If the image is integral to your teaching (for example, if it is a screenshot), the alt-text should fully explain whatever the image shows. This page shows you how to add alt text to your images in LibGuides.

**Add captions to your videos**

For any videos that have been created at Harvard that are embedded in your guide, ensure that proper closed captions have been added. This video demonstrates how to add closed captions to YouTube videos. If you are embedding a video that was not created at Harvard, try to find an alternative that has captions or does not require that the users listen to the audio track in order to understand the video.

**Use accessible documents**

If you are linking to or embedding online documents, use accessible documents, such as Microsoft Office documents, unformatted text documents, or, if necessary, OCR'ed PDFs.

**Get Help**

If you have additional questions about accessibility issues, feel free to email cspina@law.harvard.edu.

**Optional Cleanup**

Optional cleanup can performed in LibGuides v1 before the migration or LibGuide v2 after the migration unless otherwise noted. Please see the project timeline for the scheduled migration date. Review your Chart for Tracking Changes.

**Review Everything**

LibGuides v2 Only: Review your guides after the migration to make sure everything looks and acts as expected.

**Reusable Content**

Any reusable content linked to multiple guides in LibGuides v1 will remain linked in LibGuides v2. Review your guides for potential reusable content to add. Reusing content improves consistency and makes everything easier to update. You can reuse pages, boxes, links, images, widgets, books, and more.

**Links**

Consider moving links in rich text boxes to links boxes. Links boxes have many advantages over just adding links in a rich text box:

- Track statistics for each link
- Find broken links with LibGuides’ built in link checker
• Global search and replace across all links (e.g. replace beta.hollis.harvard.edu with hollis.harvard.edu or old aquabrowser links with id.lib.harvard.edu persistent links)
• Reuse links across guides
• You can still mix links and text together.

Images

• Consider optimizing images to fit general web guidelines.
• Review images and make sure they aren’t stretched too big or too small
• If you created a rotating image gallery using the SpringShare FAQ, convert it to the new built in gallery box type.
• The image manager now has folders to help organize your images or save them to the Shared Library so others can use them.