

# Migration Checklist

## The Annual Reviews platform migration to Ingenta Edify will occur during the week of March 18, 2024.

- We know that platform migrations add to the workload of our librarian customers, and we appreciate your support in making this a smooth transition. Our intention is to maintain access and functionality during the migration, and do not anticipate any significant downtime.
- All existing information will be migrated to the new platform (DOIs, URLs, subscriptions, IP ranges, link resolvers, federated access, etc.) and permanent redirects will be in place if needed to ensure continuity of access.
- You will have the opportunity to update your information on the new platform on March 19. If you need to make changes to your institution’s account between March 8–18, please contact [support@annualreviews.org](mailto:support@annualreviews.org).
- You can find answers to frequently asked questions on our [migration resources page](#).

Prelaunch Action (Prior to March 19)	Details
<b>Confirm your journal/collection entitlements</b>	Note what content you currently have access to according to your current subscription so you can confirm your entitlements/access post-launch.
<b>Gather usage statistics</b>	<p>We will be migrating 5 years of usage data from the current platform to the new platform. During the transition on the 19th, usage reports will not be available. Please keep this in mind and download usage data in advance if you will need it on this date. COUNTER 4 reports will be retired with the migration.</p> <p>Following the migration, usage reports can be downloaded from the institutional administrator dashboard. Your usage reports can be found in the “Content and Reports/ COUNTER 5” section of the institutional administrator dashboard.</p>



Postlaunch Action (March 19)	Details
<b>Activate your Institutional Administrator account</b>	Beginning March 19, site administrators will have access to the new institutional administrator dashboard. On that day, activation emails will be sent to the site administrator listed on the account. We ask that you please activate your account as soon as possible to ensure access to the portal and to familiarize yourself with the new platform.
<b>Review and update your institutional IPs and federated access methods</b>	Your IP addresses will be migrated from the current site and updated through the IP Registry if you are a member. ( <a href="https://app.theipregistry.org/Registration/OrganisationLookup">https://app.theipregistry.org/Registration/OrganisationLookup</a> ) Please confirm your IP range(s), Proxy IPs and federated access details.
<b>Confirm branding (banner text and logo), Open URL, Link Text</b>	Exact specifications for these details are available in the institutional administrator dashboard.
<b>Update your SUSHI APIs</b>	If you are using SUSHI to automatically download COUNTER reports, please note that you will need to change the settings in your SUSHI client. The new SUSHI request URL, Requestor ID, and Customer Reference ID can be found in the "SUSHI" section of the institutional administrator dashboard.
<b>Verify your library administration account information</b>	Check your contact information, username, and email address.
<b>Confirm access to COUNTER 5 usage reports</b>	We will migrate usage data to the new platform. Reports can be downloaded from the institutional administrator dashboard in the "Content and Reports/COUNTER 5" section.
<b>Verify your access to purchased entitlements</b>	Your active institutional subscription titles can be found in the "Current Subscriptions" section of the institutional administrator dashboard, and end users should be able to view full text HTML and PDF article content through your previously configured access methods. If you encounter any access issues, please contact us immediately by emailing: <a href="mailto:support@annualreviews.org">support@annualreviews.org</a> .
<b>Confirm third-party access authentication/discovery systems</b>	Current EZProxy database stanzas can be found here: <a href="https://help.oclc.org/Library_Management/EZproxy/EZproxy_database_stanzas/Database_stanzas_A/Annual_Reviews">https://help.oclc.org/Library_Management/EZproxy/EZproxy_database_stanzas/Database_stanzas_A/Annual_Reviews</a>
<b>Contact Annual Reviews Customer Support with any questions or concerns</b>	Email: <a href="mailto:support@annualreviews.org">support@annualreviews.org</a> Telephone: 800.523.8635 or +1 650.493.4400