

Migrating to Open Source Knowledge Management solutions

The case of XWiki and Confluence

Clément Aubin - OW2Con 2023

Who am I ?

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Software editor : XWiki, CryptPad

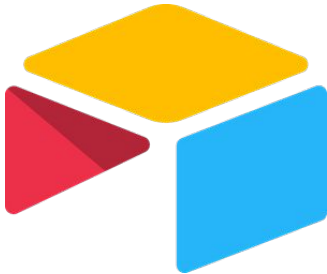
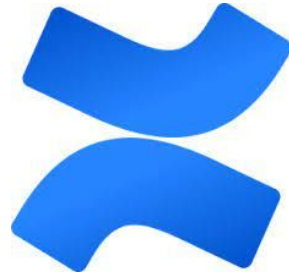
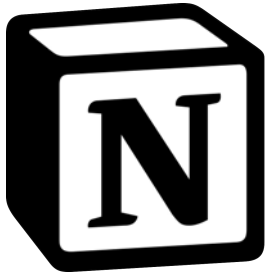
19 years of Open Source

50 employees ; remote-first, mainly in France, Romania, and EU

Engaged in EU digital sovereignty



Which tool do you use ?



Why migrating ?

- Price increase
- Retain control on data
 - Avoid transition to SaaS offering
- Search of new features
- Regulatory changes
- ...



Where to start ?

- Step 0 : find a way to get a complete export
 - Server backups*
 - APIs
 - Per-document export in a standardized format (office, CSV, PDF, ...)
- Migration of document syntax is generally** a one-time task

* Generally not available in SaaS

** Unless export syntax changes across versions with no documentation

Migration assistant

Most of the migration work

- Import of the page structure
- Import of attachments
- History handling
- Link management
- Syntax conversion

The screenshot displays the Migration Assistant interface. At the top, a progress bar shows six steps: Step 1 Prerequisites, Step 2 Space analysis, Step 3 Confluence export, Step 4 XWiki import, Step 5 Post import fixes, and Step 6 Nested pages. Below the progress bar, the 'Actions' section contains buttons for 'Compute plan' and 'Execute plan', followed by a green message box stating 'The plan have been executed!'. The 'LOGS:' section lists several actions, including converting [xwiki:TEST.Page with code] to [xwiki:TEST.Test], converting [xwiki:TEST.Page with excerpt] to [xwiki:TEST.Page with excerpt included.WebHome], converting [xwiki:TEST.Page with info] to [xwiki:TEST.Page with panels], and finishing a job of type [rpmig.executor].

The 'Confluence space analysis' section is highlighted. It features a progress bar with Step 1 Prerequisites and Step 2 Space analysis. Below the progress bar, the 'Confluence space analysis' section contains a blue message box stating 'This script has the objective of analysing a remote Confluence space and detect pages that would cause importing problems because of the page length.' Below this message box, there are two checkboxes: 'With hierarchy analysis' and 'With page imported check (Check if the pages already exist in XWiki)'. A 'Start analysis' button is located below the checkboxes.

The 'Status of the analysis' section is highlighted. It features a green message box stating 'Done.' Below this message box, there is a 'Job log' section with three entries: 'The page Too long Hierarchy: Too long Hierarchy: Too long Hierarchy 3 does not exist in the wiki. It will be created at import.', 'The page Too long Hierarchy: Too long Hierarchy: Too long Hierarchy 4 does not exist in the wiki. It will be created at import.', and 'The page Too long Hierarchy: Too long Hierarchy: Too long Hierarchy 5 does not exist in the wiki. It will be created at import.'

Devil is in the details

Knowledge management solutions don't handle data the same way : the 80 / 20 rule

- Organization structures
- Macros & Extensions
- Groups & access rights

Individual Users
Grant permissions to individual users, regardless of which groups they are a member of.

	All	Pages		Blog		Attachments		Comments
	View	Delete Own	Add	Delete	Add	Delete	Add	Delete
admin (admin)	✓	✓	✓	✓	✓	✓	✓	✓
user1 (user1)	✓	✗	✗	✗	✗	✗	✗	✗

Edit Permissions

Results 1 - 5 out of 5 Page 1

Groups Users **View** Comment Edit Script Delete Admin Register Program

Search filter:

	Management	Marketing	Projects	XWikiAdminGroup	XWikiAllGroup	Prevent unregistered users from viewing pages, regardless of the page or space rights	Prevent unregistered users from editing pages, regardless of the page or space rights	Require unregistered users to solve a captcha when posting a comment on a page
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Prevent unregistered users from viewing pages, regardless of the page or space rights
 Prevent unregistered users from editing pages, regardless of the page or space rights
 Require unregistered users to solve a captcha when posting a comment on a page

Macros and extensions

Maintain a list of supported «equivalent» macros

- Some macros don't need to be migrated
- Some macros are actually indicative of a larger feature set

The image displays two overlapping screenshots of a task management interface. The top-left screenshot shows a task list with three status categories: 'DONE' (green), 'IN PROGRESS' (yellow), and 'CANCELLED' (red). Under 'DONE', there are items 1, 4, and 5. Under 'IN PROGRESS', there are items 2, 3, and 6. Under 'CANCELLED', there are items 7 and 8. Below the list is a table with two columns: 'name' and 'task'. The rows are: 'first' with 'a task name', and 'second' with 'another task name'. The bottom-right screenshot shows a similar interface but with a third status category, 'CANCELLED' (red), which contains items 7 and 8. The 'IN PROGRESS' category contains items 2, 3, and 6. The 'DONE' category contains items 1, 4, and 5. Below the list is a table with three columns: 'name', 'task', and 'comment'. The rows are: 'first' with 'a task name' and 'some comment', and 'second' with 'another task name' and 'some other comment'.

Macros and extensions

Macros can be developed through consulting

- In Confluence : use the macro report page to get information about existing macros
- Requests for new macros are centralized to reduce development costs
- Macros are then released in an Open Source package (more on that later)

The image shows two overlapping screenshots from a Confluence interface. The background screenshot, titled 'Open action items', displays a list of tasks with columns for 'Description' and 'Due d'. The foreground screenshot, titled 'Here are the tasks that are done for now.', shows a table of tasks with columns for 'Task', 'Deadline', 'Assignee', and 'Location'. Both screenshots include pagination controls.

Task	Deadline	Assignee	Location
#23 The content of the columns from stacked user lists is not aligned @Marius Dumitru Florea 20 Apr 2023	20/04/2023 14:38:00	Marius Dumitru Florea	Roadmap April
#22 When using LDAPs, identify the SSL Path and SSL provider automatically @Stefana Nazare 01 May 2023	01/05/2023 14:35:00	Stefana Nazare	Roadmap April

Financing

Migrating to an Open Source solution *does not* mean the end of recurring subscriptions

- As with proprietary software, Open Source solutions need to be maintained
- A solution : professional support + Open Source extensions, with an activation licence
- Extensions under activation licence are targeted towards business use-cases

Example : XWiki Pro Macros package

Open Source extension, licensed under LGPLv2, available on GitHub :

<https://github.com/xwikisas/xwiki-pro-macros>

- The extension is distributed along with a licenser, which verifies that the instance has a support subscription
- Anyone is free to build the extension without the licenser
- The subscription also gives access to support

Thank you !

