

# IMLS Grant Update

## Fedora Migration Paths and Tools: A Pilot Project

### Goals:

To develop, pilot, and document migration tools and paths to upgrade the repository software Fedora 3 to Fedora 6.

- LG-246264-OLS-20
- \$249,859 IMLS Funded grant over 18 months

✓ All roads to 6.0 are open



### Partners:

**Fedora™**

<https://duraspace.org/fedora/>



WHITMAN COLLEGE

<https://www.whitman.edu>

Fedora 3 + Islandora 7 ▶

Fedora 6 + Islandora 2.0



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<https://www.virginia.edu>

Fedora 3 + custom front end ▶

Fedora 6 + custom front end

### Timeline:

#### Phase I - Pilot Migrations (Sept 2020 - Aug 2021)

- Define project plans for each pilot institution
- Document the migration and upgrade process
- Detail metadata mapping and decision making
- Test migrations

#### Phase II - Validating & Improving the Toolkit (Sept 2020 - Dec 2021)

- Consolidate toolkit materials
- Test and iterate tooling
- Develop training materials

#### Phase III - Migration Training Workshop (Jan 2022 - present)

- Distribute migration toolkit for community feedback

### Lessons Learned:



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- Edit/remediate metadata & collection structure before migration if at all possible
- Build quality control into all stages of the migration
- A checklist for metadata and object preparation can significantly reduce errors and streamline the process
- Using a checklist of object-level, collection-level, and search/facet expectations to be met during the migration helps to identify any issues early in the process
- Comparative data from record views and searches in a previous system can help identify issues
- When possible, establish automated, system-wide checks for issues like failed derivative generation, rather than spot-checking
- Clear communication and documentation always help the project advance



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- Evaluate and understand the content you intend to migrate
- Prioritizing content to migrate would have supported an iterative approach
- Data clean up and assessment would have allowed for early detection of potential issues
- Establish infrastructure requirements in advance
- Test infrastructure design and performance with subset of data
- Allocate ramp up time for technical staff (older repo)
- Divide and Conquer
- Migrate a subset of content allowing for iterative test & correction
- Specific task assignment, follow-up and coordination with staff reduces time lags

### Tools:



**Migration-utils:** A framework to support migration of data from Fedora 3 to 6 repositories.

<https://github.com/fcrepo-exts/migration-utils>

**Migration Validator:** A command-line tool for validating migrations of Fedora 3 datasets to Fedora 6.

<https://github.com/fcrepo-exts/fcrepo-migration-validator>

### Helpful Links:



<https://wiki.lyrasis.org/display/FF/Fedora+Migration+Paths+and+Tools>  
<https://wiki.lyrasis.org/display/FEDORAM6M0P0/Migrate+to+Fedora+6>

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