

Islandora - Test Migration

It is a good idea to run multiple test migrations before proceeding to a production migration. It can help you identify and resolve potential issues with the data or with configurations.

At a minimum, test migrations of each different content type should be run in order to verify that each content type is handled as expected.

Objectives

- Based on the results of test migrations, determine whether content is ready for migration.

Suggested Collaborators

- Project Lead
- Technical Lead
- Developers
- Functional Specialists, i.e. metadata librarians, digital preservation teams etc.
- SME on data and data migration
- IT Department for security and access requirements

Examples

- Whitman College's [QC Checklist on Production](#)
- Whitman College's [documentation for preparing spreadsheets](#)
- Whitman's [template & checklist](#) for preparing spreadsheets

Instructions

1. Plan migration tests

Before conducting migration tests, draft a plan to document the following specifications:

- Test methodologies
- Numbers of test that you plan to perform
- Purpose, goals, and acceptance criteria for each test
- Test schedule
- Test environment

If you plan on running a large number of tests, consider creating a folder to manage your test migration spreadsheets, along with a spreadsheet to keep track of each test migration.

See Whitman College's [QC Checklist on Production](#) as an example.

The Collection QC checklist tab of the spreadsheet lists a number of expectations for site display and functionality. These are not exhaustive, but do capture many of the possible ways that mistakes in the ingest forms or in site configuration might be reflected in the appearance of objects in collections on the new site.

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2. Prepare data

If you have chosen Islandora Workbench as your migration tool, export your metadata to a CSV file if you have not already done so. Workbench comes with a standalone script, `get_islandora_7_content.py`, that can be used to extract (a.k.a. "export") metadata and OBJ datastreams from an Islandora 7 instance. This data can form the basis for Workbench input data.

See Whitman College's [documentation](#) on how they prepared their spreadsheets for ingest as an example. You may need to change some settings depending on how similar your installation is to Whitman's.

See Whitman's [template and checklist](#) for preparing spreadsheets as an example. The spreadsheets capture the metadata fields used across all collections and documentation on how to prepare metadata for ingest into Islandora 8/2.x using Islandora Workbench.

3. Conduct test migration

Follow Whitman College's [Sample Migration Workflow](#) to conduct sample migrations for both simple and complex objects. This sample migration workflow assumes that you are using the theme provided to the Foundation as part of the migration pilot.

If you are testing with a very large collection that is broken down into multiple spreadsheets for ingest, check for errors after the first spreadsheet has been ingested, and at a number of points along the way.

If you have prepared spreadsheets to track tests during the planning stage, use them to document the results of each test.

4. Review results of each tests

Based on the results of the tests, here are examples of some questions to consider:

- How much time would be needed to migrate your entire repository?
- What are the plans to minimize interruptions to users?

5. Debug and re-test if necessary

If you notice any errors in configuration or metadata, resolve them before retesting and moving forward with production migration.

Result Analysis:

1. How much time would be needed to migrate your entire repository?
2. What are the plans to minimize interruptions to users?

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