

# Migrating a Repository from Digital Commons

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## Tips and Lessons Learned

ACRL New England Chapter Scholarly Communication Interest Group  
Fall Program | December 7, 2017

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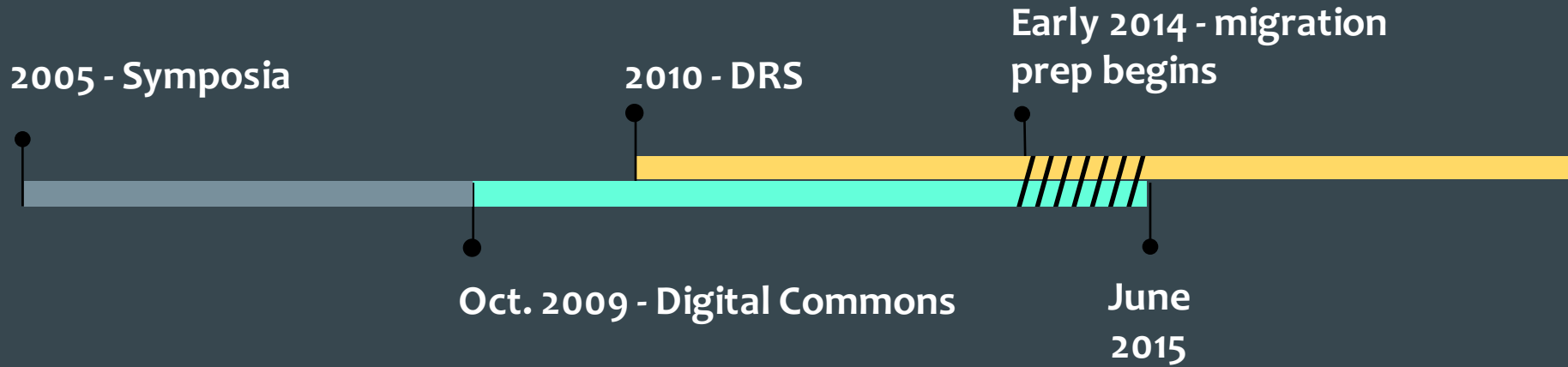
# A little history...

We started our repository, called IRis, in 2005

- Initially used the Symposia platform from Innovative Interfaces (we were development partners)
- Transitioned IRis to Digital Commons in 2009 in order to free up staff time and phase out our development partnership with Innovative
- We moved from Digital Commons to our Fedora/Samvera-based Digital Repository Service (DRS) in 2015

Sounds pretty straightforward, right?


# Repository platform timeline



# Our initial repository needs

November 2004:

- Preserve the unique digital assets of the university
- Highlight NU's accomplishments to external audiences
- Make research available more quickly
- Serve to alleviate some of the expense of scholarly publishing



IRis

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- NU's Institutional Repository
- Repository of what?
- Why is this important?

# Digital Commons – IRis

Pros (for us):

- Great customer service
- Appealing end-user interface
- Well suited for document-based collections
- Ease of deposit and updates
- Built-in journal publishing platform
- Integration with faculty profile platform (Selected Works)
- Nice presentations of usage statistics

# Digital Commons – IRis

Cons (for us):

- Limited customization was available
- All file types were handled the same
- Our content was not stored locally
- Platform was proprietary, not open source

# Our current repository needs

- User Needs

- Storage and discovery for many types of scholarly, archival, and administrative materials
- Native handling of a variety of file types, including image, text, video, audio, and raw data, with reasonable upload size limits
- Ability to restrict access to sensitive or private files

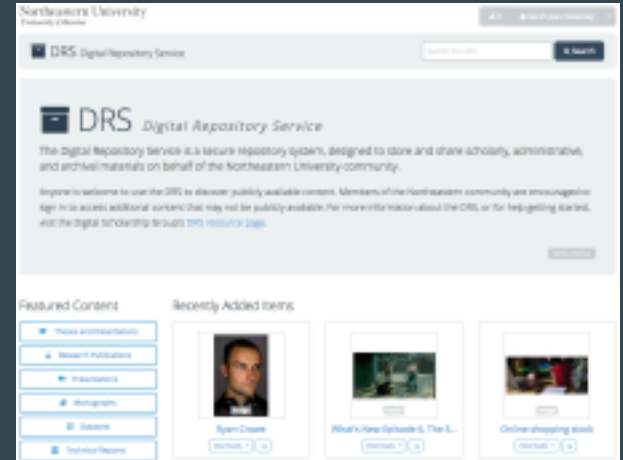
- Library Needs

- Rich metadata options (MODS preferred)
- Customizable OAI and API feeds for multiple data consumers and harvesters
- Administrative tools for batch work, including uploads and metadata edits

# Digital Repository Service – DRS

[repository.library.northeastern.edu](http://repository.library.northeastern.edu)

- Beta, 2010-2015
  - PHP/HTML proof of concept
  - Supported images and documents for NU Archives and other administrative units
- v.1, 2015-today
  - Fedora repository with Hydra/Samvera Ruby on Rails user interface
  - Supports many material types, granular permissions settings, rich metadata, full-text indexing, many administrative tools, and more...





# Digital Repository Service – DRS

- Advantages
  - In-house development is responsive to the needs of our user base
  - Set our own feature release schedule
  - Linked to NU's authentication and user management services
  - Can use (relatively) inexpensive NU storage infrastructure
- Challenges
  - Steep learning curve for systems development work (prioritizing features, estimating dev. time, setting milestones, fixing bugs)
  - Needed to reproduce well-liked Digital Commons features
  - Requires full-time repository manager
  - Hiring (and retaining) developers in a competitive market

# Our migration experience

2012 - 2013

- Initial planning
- Metadata mapping & review

Sept. 2014 - June 2015

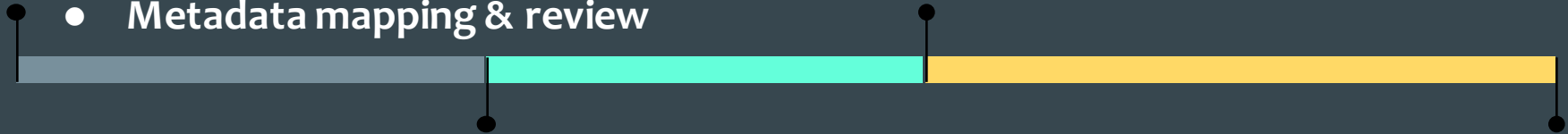
- Active migration

Jan. - Sept. 2014

- Metadata transformation & cleanup
- File review

June 2015

- IRis retired



# Our migration experience

## Challenges and issues:

- Metadata migration—field mapping, special character encoding
- PDF problems—Digital Commons cover sheets, corrupted files
- No way to know if we got everything that had been in DC
- Impossible to catch every migration problem, so still finding issues
- Unable to transfer usage stats, so had to start over
- Unable to redirect URLs, only the handles we assigned
- Editors of hosted journal had mixed feelings about platform switch (we moved them to OJS)

# What to consider when planning a migration

Questions to ask before making the decision:

- What do your repository users need right now? How do their needs stack up against what your repository can do?
- What will your repository users need five years from now? Can your vendor or platform accommodate those needs?
- There will always be issues with your repository: do you want to choose your own problems or be handed a set of problems?

# What to consider when planning a migration

Things you'll need to do to survive it:

- Build a team, but don't manage by committee
- Set goals, deadlines, and benchmarks—and stick to them
- Prepare for the migration to take longer than you think
- Communicate: give regular updates as the migration moves forward

**Ask yourself: Is what you gain worth the work to migrate?**

# Takeaways and tips

- Timeline: plan for expansion
- Metadata: be prepared to find issues
- Files: spot-check to make sure they're healthy
- Inventory: get one, make one
- Outreach: some users will not welcome change
- Follow-up: you will be haunted by the ghost of your former platform

**We are not authorities, just survivors.**

# Thank you!

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