Data migration

ELAG 2016, Copenhagen

Data migration : feedback from an Open Source company

Paul Poulain, BibLibre

Who I am

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- Paul Poulain, French (Marseille)
- Open source addict since 1997
- Involved in Koha since early 2002
- Former **Koha** Release Manager [v 2.0, 2.2, 3.8, 3.10]
- Member of **Coral** Steering Committee
- Founder of BibLibre, Open Source software for libraries

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Who I am

BibLibre want to help libraries deploying Open Source

- ➔Migration, tuning, training,…
- ➔Hosting (SaaS of all the software we support)
- ➔Koha, Omeka, Coral, Bokeh, Piwik

BibLibre facts

- ➔1M€ yearly income
- ➔17 people
- ➔150+ customers, in 8 countries, 600+ libraries, 200+ data migration

Data migration

Note:

- ➔You're librarians, I'm a support provider, I'll highlight
  - ➔Things you should put on your tenders
  - ➔How the work should be splitted between you and us

Data migration

So you want to

But … you must exit with…

… your data

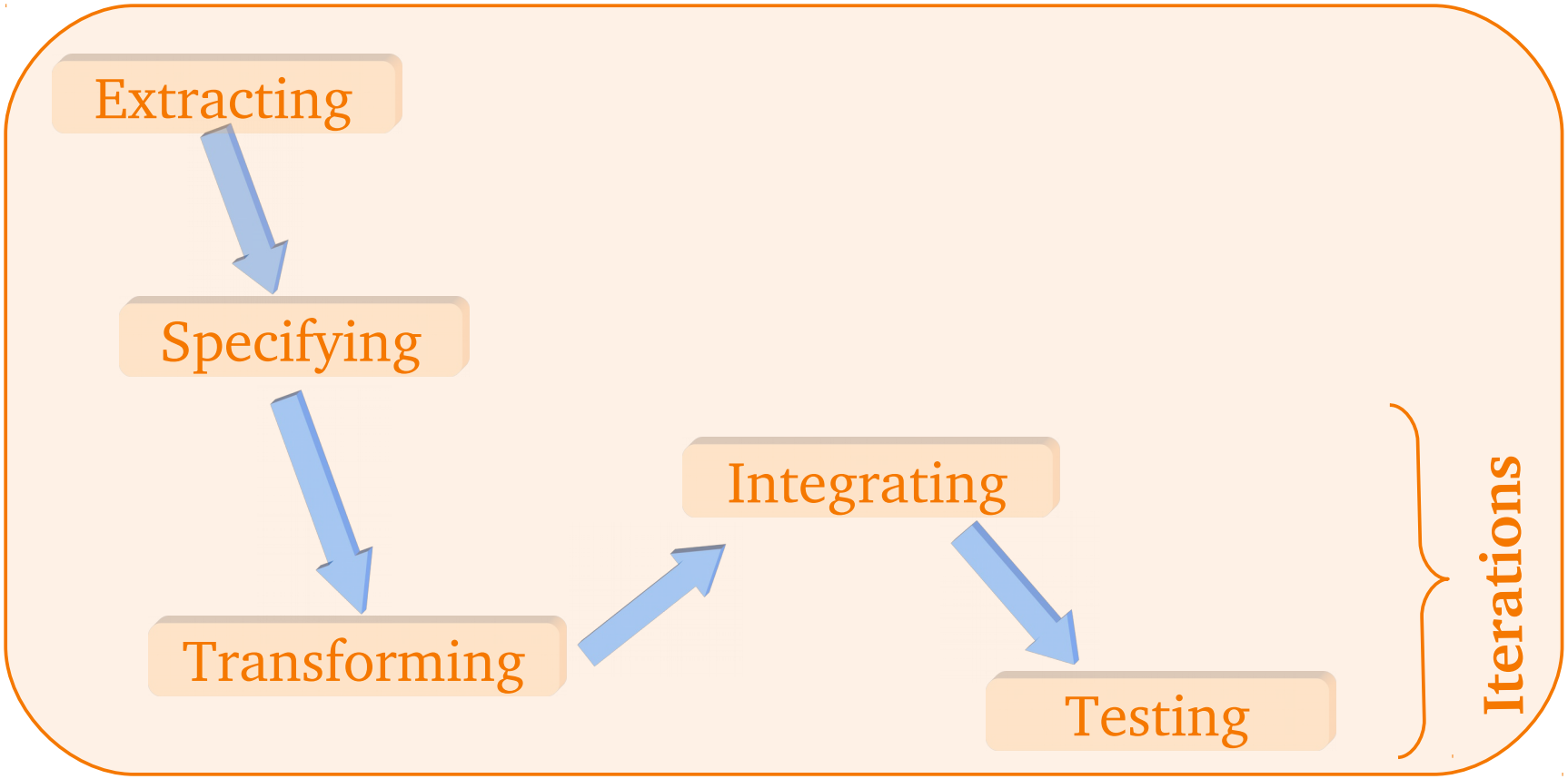
Data migration

What can be migrated

- Bibliographic records (of course)
- Items (of course)
- Authorities
- Patrons
- Issues (current/history)
- Holds (current/history)
- Vendors & orders (current/history)
- Serials, printed (well, not really in fact) and electronic resources

Data migration

Steps

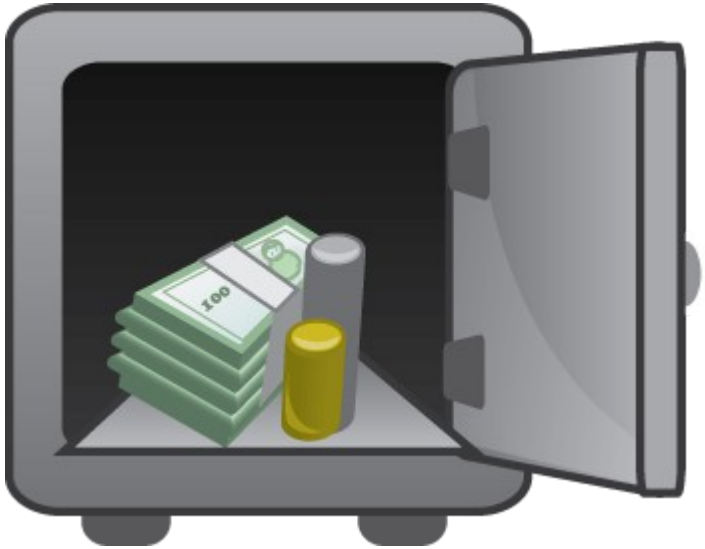


Extracting

“Easy” step

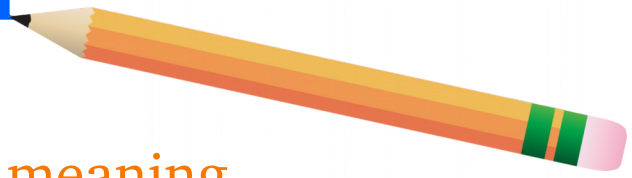
Pre-requisite

- ➔Which format
  - ➔Iso2709
  - ➔XML (! schema)
  - ➔CSV (! vocabulary)
- ➔Which encoding ?
  - ➔Unicode
  - ➔What if there is a mix
- ➔Who extract your data from your old software?



Specifying

What must be specified



- Format description
  - including codes and their meaning
- Old software <> New software equivalences
- Links between files, where applicable
- Transformations to do
- Expected results
- Test plan

Specifying

RFP

- In your RFP, write as many things as possible about your expectations & requirements
- Examples:
  - Great: “the library want to migrate the bibliographic records and the items. 10% of the record are using a wrong encoding. The subject fields will have to be retrieved from the LoC and appended.
  - Acceptable: “the library want to migrate the bib. records and items. Some transformations will have to be done during the transition to the new system”
  - Wrong: “everything must be migrated”

Specifying

Who specify

- Best: together
  - You know your data better
  - Your vendor knows the new system better
- Good: you
- Not good: your vendor

Transforming

Sometimes not needed, but rarely

Transformations required by the new ILS

- ➔Very frequent for items (for example: locations, call number, holds/issue status)
- ➔Who does it ?
  - ➔Good: your vendor
  - ➔Not good: you

Transforming

Transformations required by your data

- ➔Cleaning old & irrelevant data
- ➔Merging and de-duplicating
- ➔Who does it ?
  - ➔If you expect your vendor to do it, write it in your RFP !

Transformation to enrich your data

- ➔Merge
- ➔De-duplication
- ➔(Linked data)

Transforming

Tools

- Marcedit
- MARC::Transform to Transform Marc records
- Spreadsheet
- Openrefine
- MARC::Loader to create MARC Records
- Catmandu

Repeatability of the process.

Integrating

Made by your vendor (except if you're going Open Source ;))

If you do it yourself

- ➔Use official APIs (if you do it yourself)
- ➔Who endorses errors ?

Testing

Underestimated in most cases

Who write the test plan

- ➔Better: together
- ➔Good: you
- ➔Not good: Your vendor

Who execute the test plan

- ➔Better: Your vendor, then you
- ➔Good: You
- ➔Not good: Your vendor

Migration logs are very important

Testing

Building the test plan

- ➔Volumes expected
- ➔Use case
- ➔Comparison between old & new system

Caveats

- ➔You must “think new software”, but you still “think previous software”
- ➔You can’t test everything, select !

Testing

Reporting problem

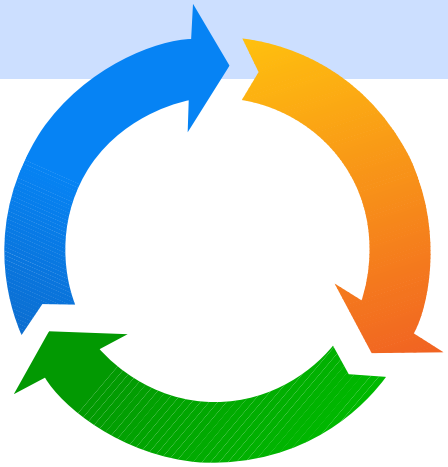
- ➔Give identifiers
- ➔Give URL
- ➔Give screenshots
- ➔Example
  - ➔“if I search, it does not work” is **not** a usable report !
  - ➔“If I search for *blabla*, I expect to get 100 results, I get only 20” is a **usable** report
  - ➔If I search for *blabla*, I expect to get 100 results, I get only 20, the following are missing: x, y, z” is a **good** report

Miscellaneous

HINT:

- ➔Keep old identifier somewhere in your new system, if may be useful (and remember Murphy's law)
- ➔It's a logical process, check there are no hole
  - ➔"if this contains "B" do that, if this contains "A" do that". What if not A or B ? (murphy's law again !!!)
  - ➔Move field 600 in 601 if 600$a start by 'A'. What if there is already a 601 ?

Iterating



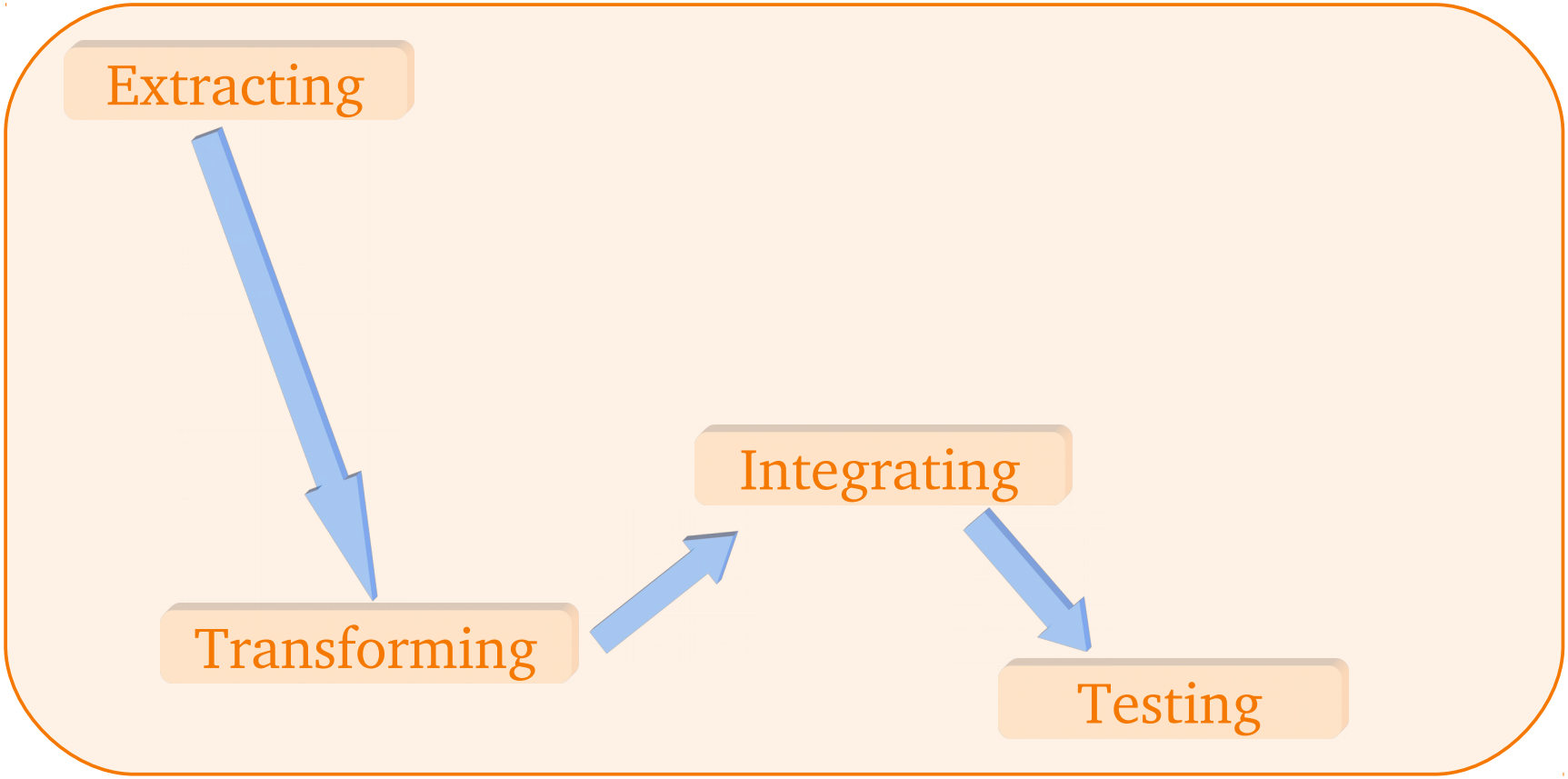
Why iterating?

- ➔Nobody's perfect
- ➔Cost of mistake discovery
  - ➔1 at spec. step
  - ➔10 at test step
  - ➔100 immediately after going live
  - ➔1000 far after going live
- ➔Make the process as automated as possible
  - ➔The bug is usually between the chair and the keyboard

For a small library, 2-3, for a large 3-5

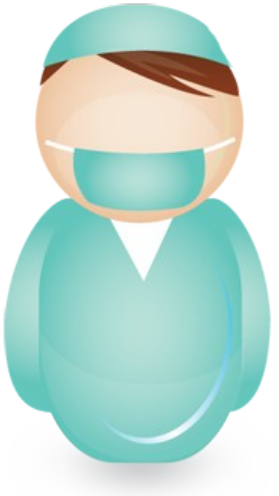
Final migration

Replay



Final migration

Go live



References

Main websites:

- MARC::Transform: http://search.cpan.org/perldoc?MARC%3A%3ATransform
- MARC::Loader: http://search.cpan.org/perldoc?MARC%3A%3ALoader
- Openrefine: http://openrefine.org/
- Marcedit: http://marcedit.reeset.net/
- Catmandu: http://librecat.org/

THANK YOU !