Planning an RT2 Migration

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Repository integrations by platform

12 RT1 DSpace

22 RT2 DSpace

1 Hyrax

14 RT1 EPrints

9 RT2 Eprints

4 RT1 Fedora 3

17 Figshare for Institutions

2 Others

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*as at 25 June 2019 - includes live and implementing integrations

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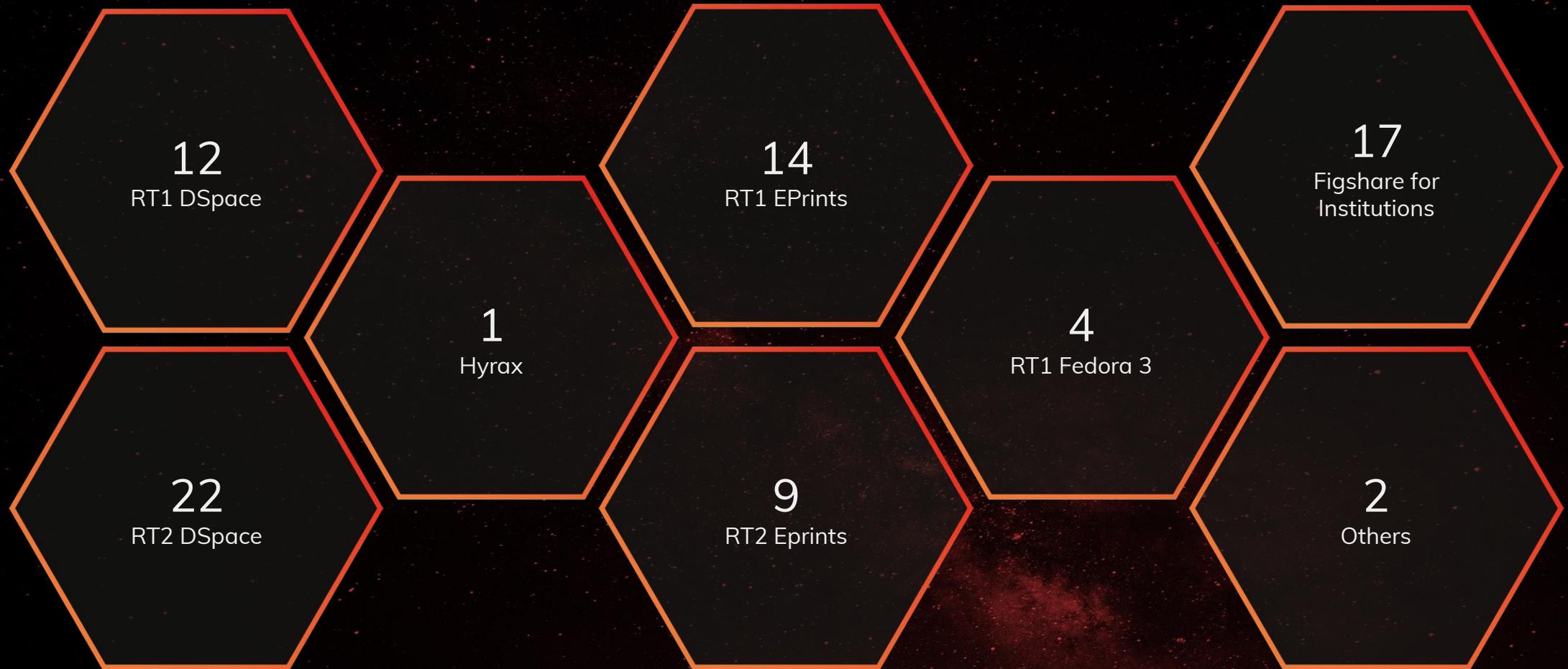
Key stages of a migration

Plan field mappings

Transfer RT1 linkages

Customise crosswalks

Adjust OA policy settings
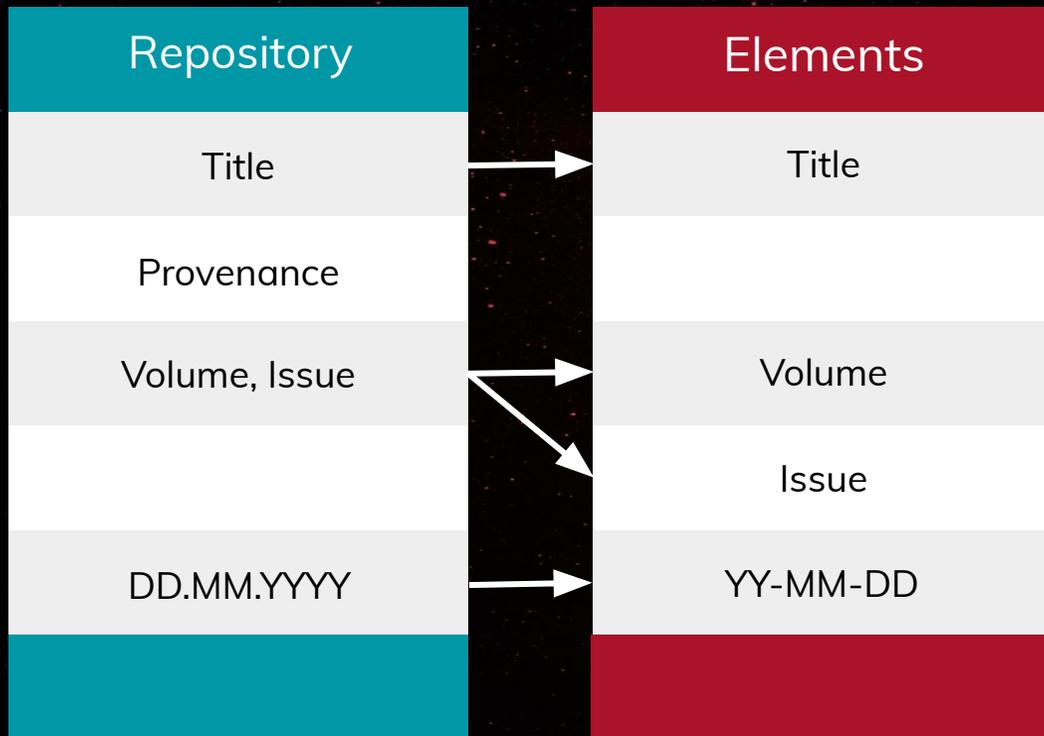
Configure connection
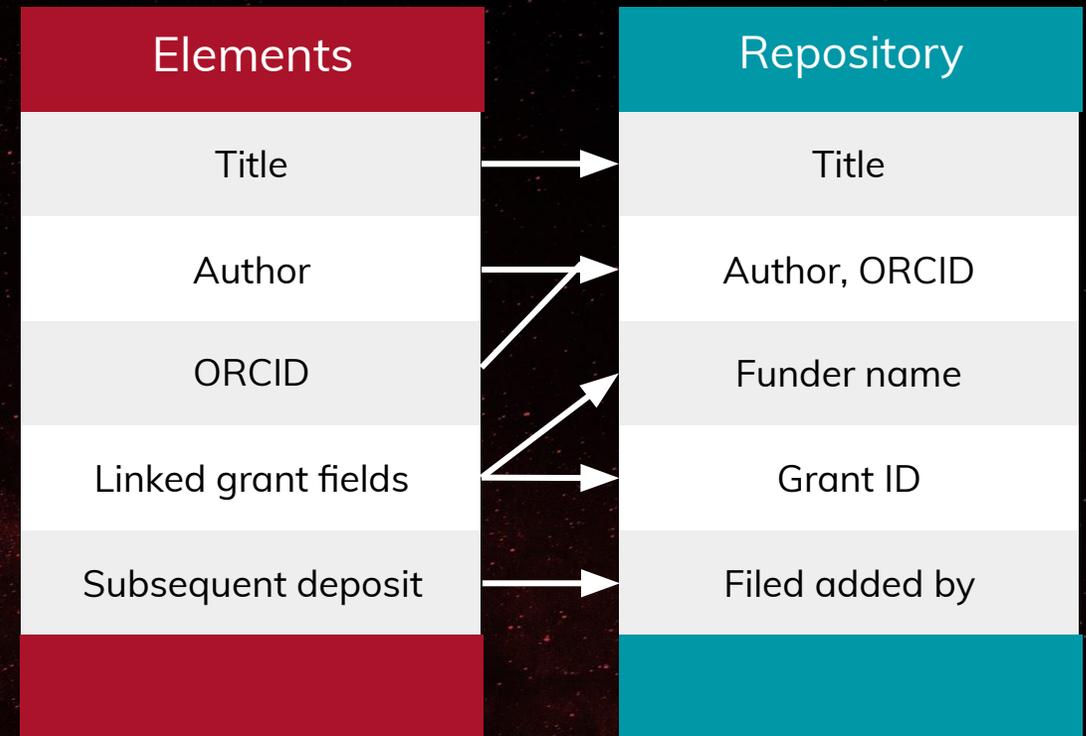
Adjust other integrations

Test crosswalks

Plan cut over & go-live

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Planning your field mappings

Harvest crosswalks

Deposit crosswalks

Repository	Elements
Title	Title
Provenance	
Volume, Issue	Volume
	Issue
DD.MM.YYYY	YY-MM-DD

Elements	Repository
Title	Title
Author	Author, ORCID
ORCID	Funder name
Linked grant fields	Grant ID
Subsequent deposit	Filed added by

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Customising your crosswalks

Written in XML, the crosswalks are supported by an extensive, flexible schema.

Start by defining your default mapping and then add specific type/field customisations.

The object-neighbourhood allows you to map metadata about linked objects in ELements.


```xml
<?xml version="1.0" encoding="utf-8"?>
<xwalkin:consolidated-maps xmlns:xwalk="http://www.symplectic.co.uk/elements/xwalkcommon" xmlns:xwalkin="http://www.symplectic.co.uk/elements/xwa
  <xwalk:parameters></xwalk:parameters>
  <xwalk:field-maps>
    <xwalk:field-map name="default-field-map">
      <xwalk:field-mapping to="title">
        <xwalk:field-source from="title" />
      </xwalk:field-mapping>
      <xwalk:field-mapping to="authors">
        <xwalk:field-source from="authors">
          <xwalk:field-source from="full_name" format="person:firstnames-lastname" />
          <!-- Retrieve the user ID for authors marked as "active" -->
          <xwalk:field-source data-part="person:identifier" value-map="active-user-ids">
            <xwalk:field-source from="id" data-part="identifier:value" />
            <xwalk:field-source value="figshare-for-institutions-user-id" data-part="identifier:scheme" />
            <xwalk:field-source from="is_active" data-part="temp:value1" />
          </xwalk:field-source>
        </xwalk:field-source>
      </xwalk:field-mapping>
      <xwalk:field-mapping to="public-url">
        <xwalk:if>
          <xwalk:condition argument-field="status" operator="equals">public</xwalk:condition>
          <xwalk:result>
            <xwalk:field-source from="url_public_html" />
          </xwalk:result>
        </xwalk:if>
      </xwalk:field-mapping>
      <xwalk:field-mapping to="doi">
        <xwalk:field-source from="doi" />
      </xwalk:field-mapping>
      <xwalk:field-mapping to="keywords">
        <!-- The Elements keywords field is populated from both the tags figshare field and the categories/title field -->
        <xwalk:field-source from="tags" value-map="is-categorised" />
        <xwalk:field-source from="categories" value-map="is-categorised">
          <xwalk:field-source from="title" />
        </xwalk:field-source>
      </xwalk:field-mapping>
      <xwalk:field-mapping to="notes">
        <!-- &#xD; is the CR character; &#xA; is the LF character -->
        <xwalk:field-source from="references" concatenate-with-separator="&#xD;&#xA;">
          <xwalk:field-source prefix="reference: " from="." />
        </xwalk:field-source>
      </xwalk:field-mapping>
      <xwalk:field-mapping to="abstract">
        <xwalk:field-source from="description" value-map="strip-html-elements" />
      </xwalk:field-mapping>
      <xwalk:field-mapping to="author-licence">
```

figshare-for-institutions-XwalkIn-map.xml

MacBook

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Customising your crosswalks

From Elements 5.15 we will be introducing new functionality which allows administrators to edit the crosswalks directly within the Elements UI.

When you finish making your edits you will be able to test your crosswalk and then save it and automatically upload the changes.
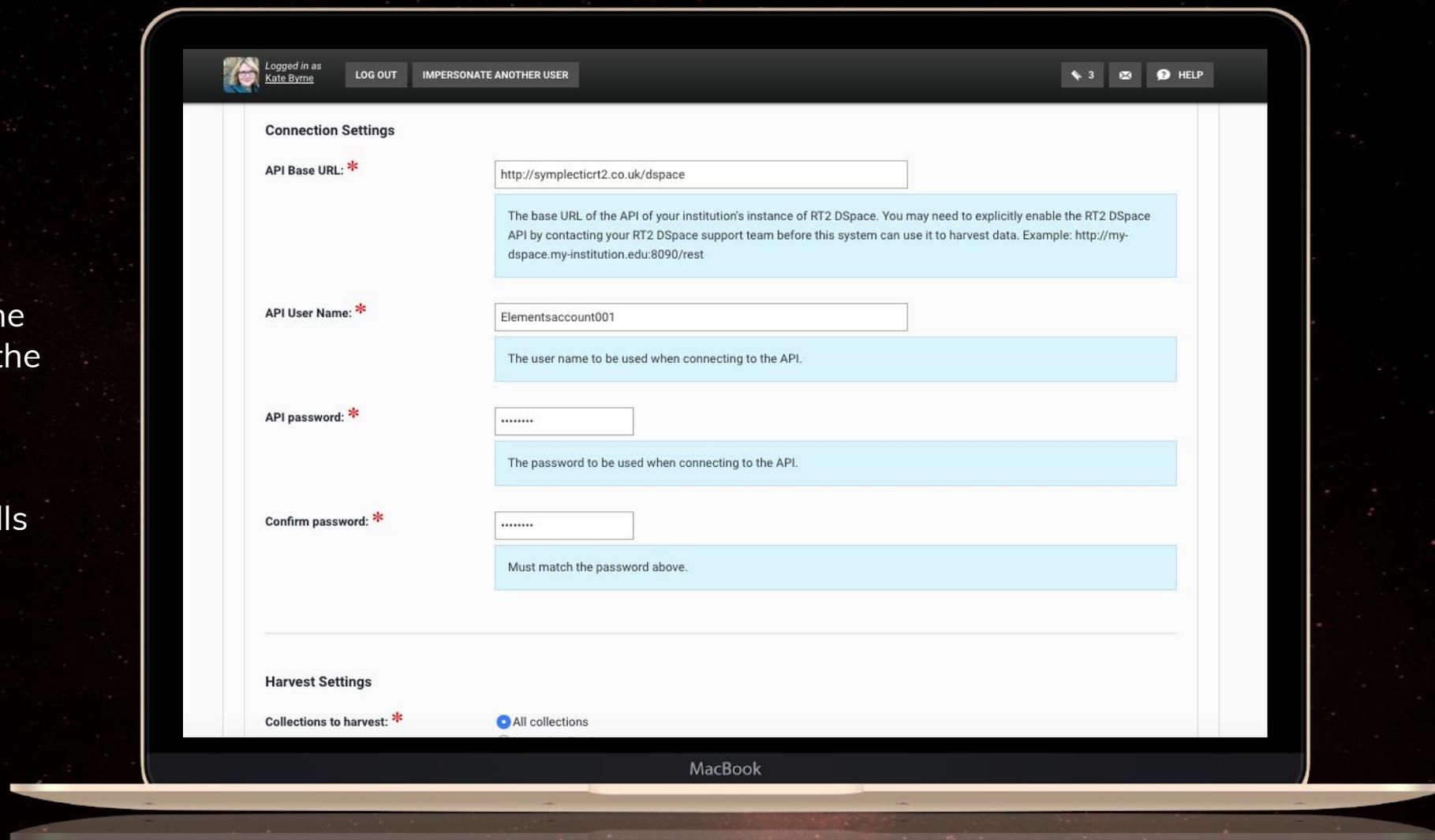

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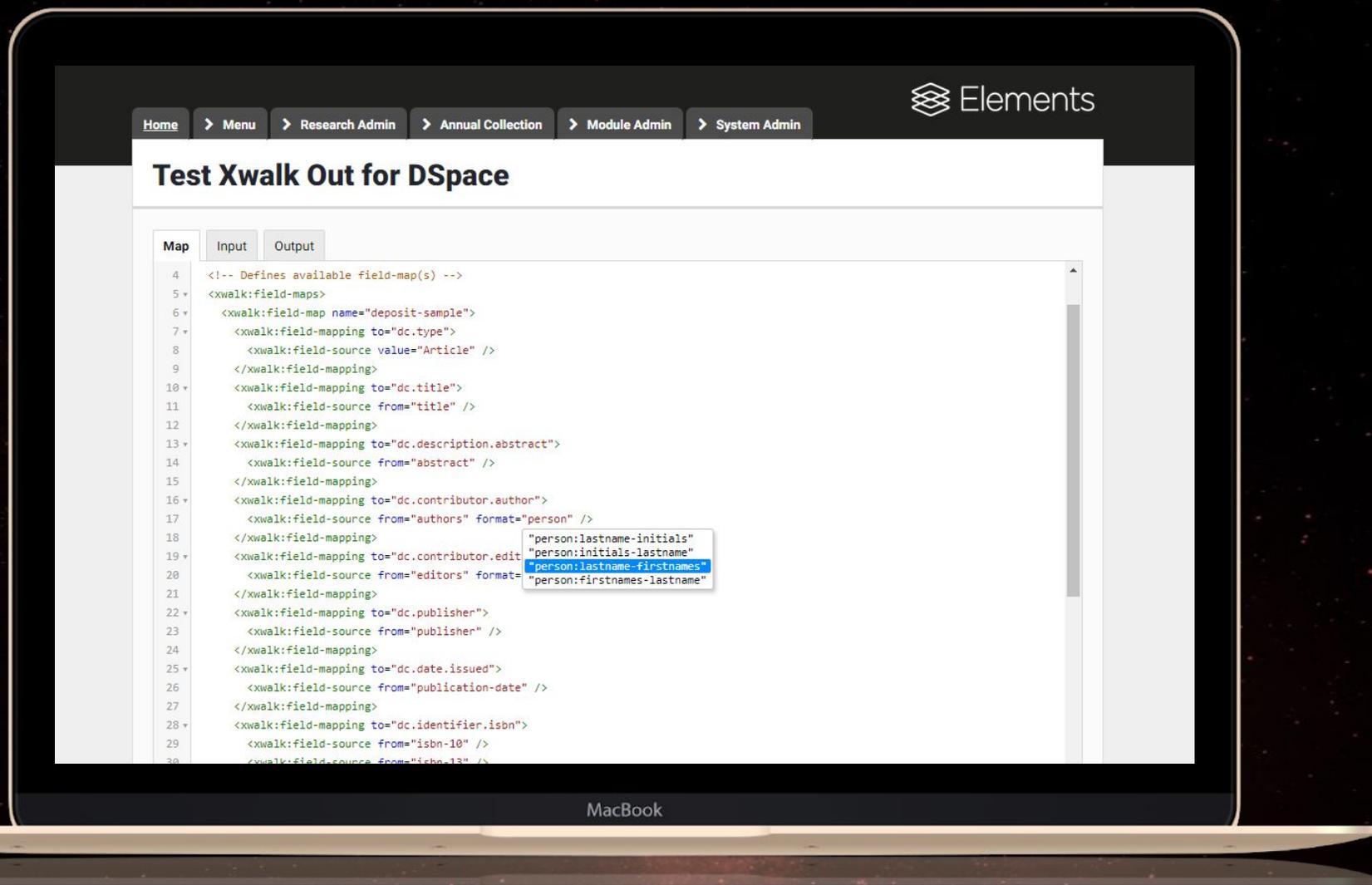
Configure connection

Create an administrator account for Elements in the repository API and enter the credentials into the Elements UI.

Don't forget about firewalls and permissions.

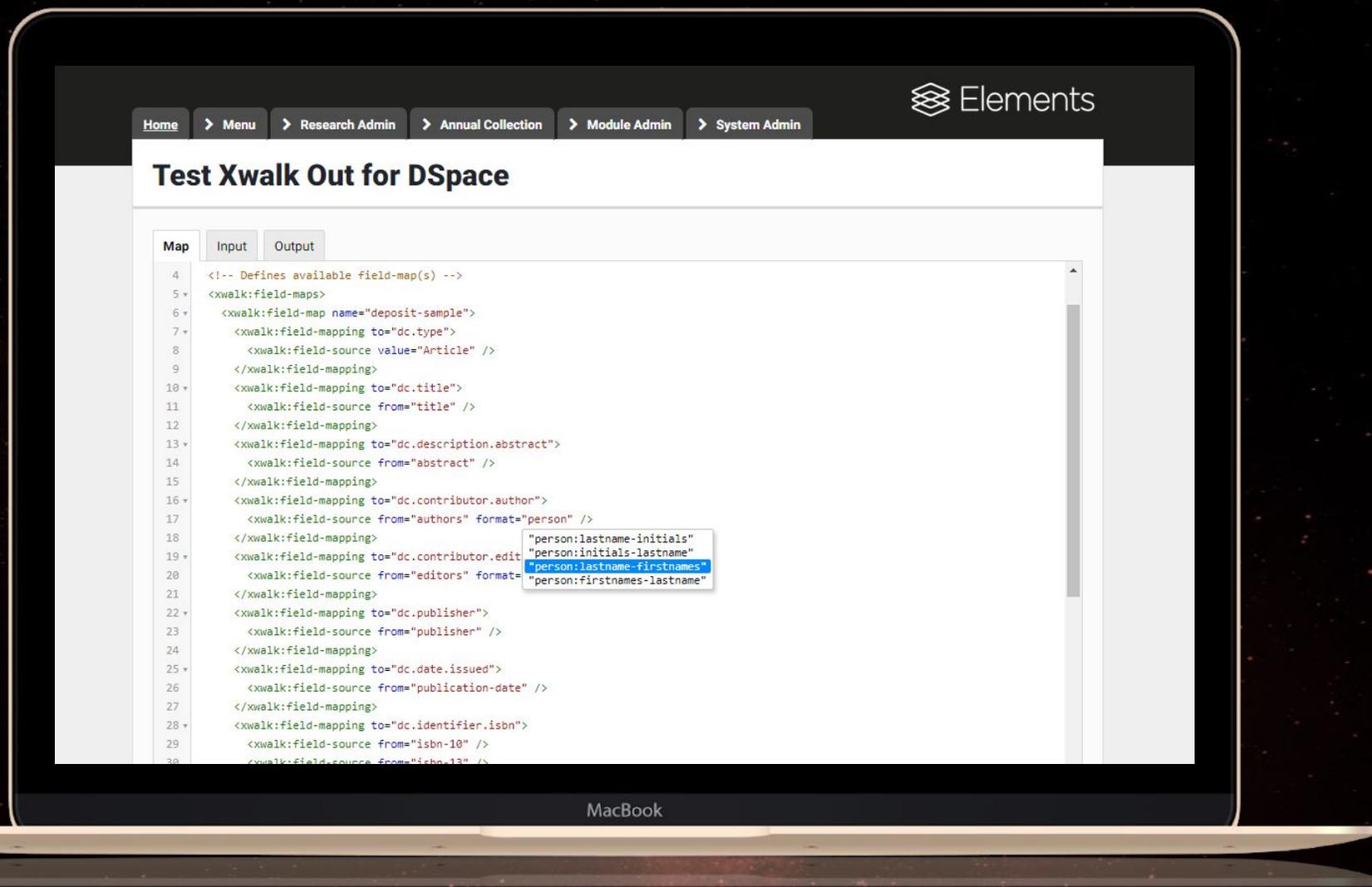Configure harvest and deposit settings.

Don't enable until your crosswalks are ready.

Optional: Automated Metadata updates

If you desire to use our Automated Metadata updates you will need to configure which metadata updates are 'relevant' to their repository.

This ensure that Elements will only populate updates to those specific permitted metadata fields.
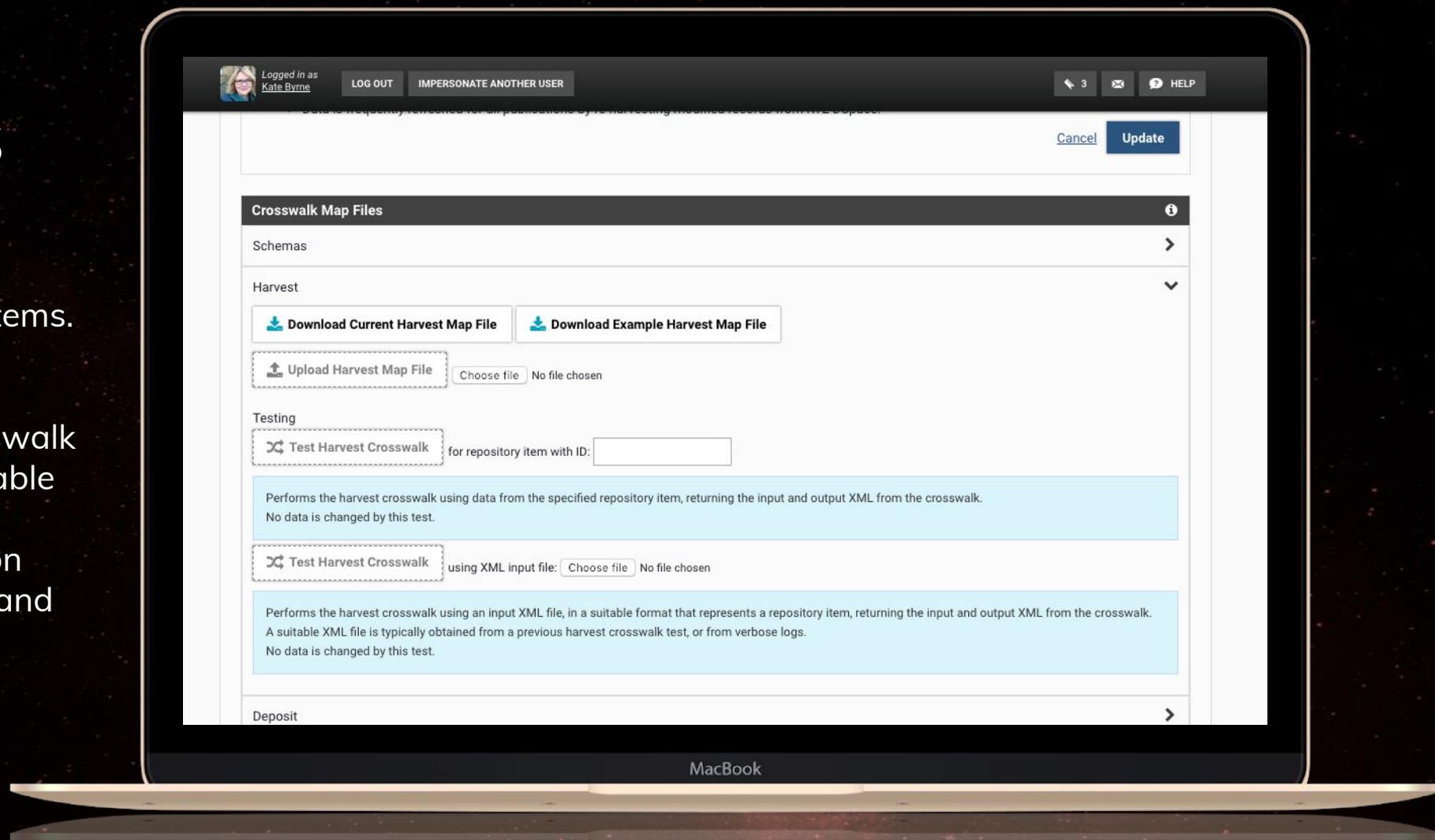
Test Crosswalks

Always start in a Test
Environment for both systems.

Two Stages:
- Use our built in crosswalk tester before you enable the connection
- Enable the connection and run the harvest and make deposit s and review results
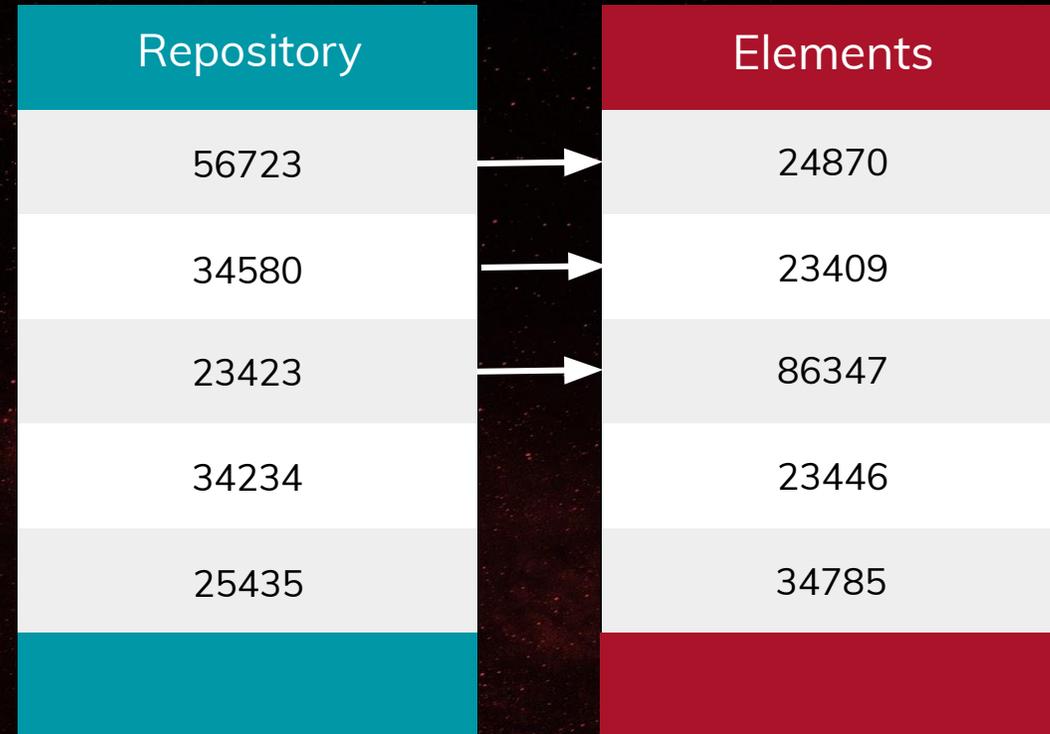
Adjust the crosswalks and retest.

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Transfer RT1 linkages to RT2

We can provide you with a script to take the matches from your RT1 integration (held in the identifiers table) and use them to inform the matches created on the initial harvest into Elements.

This ensures your existing known linkages are preserved. Any new items will then be matched within Elements via our standard matching algorithm.

Repository
56723
34580
23423
34234
25435

Elements
24870
23409
86347
23446
34785

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Adjust OA Policy settings

Review your OA Policy settings to ensure they are consistent with your new crosswalks.

Make sure you select the correct target repository.
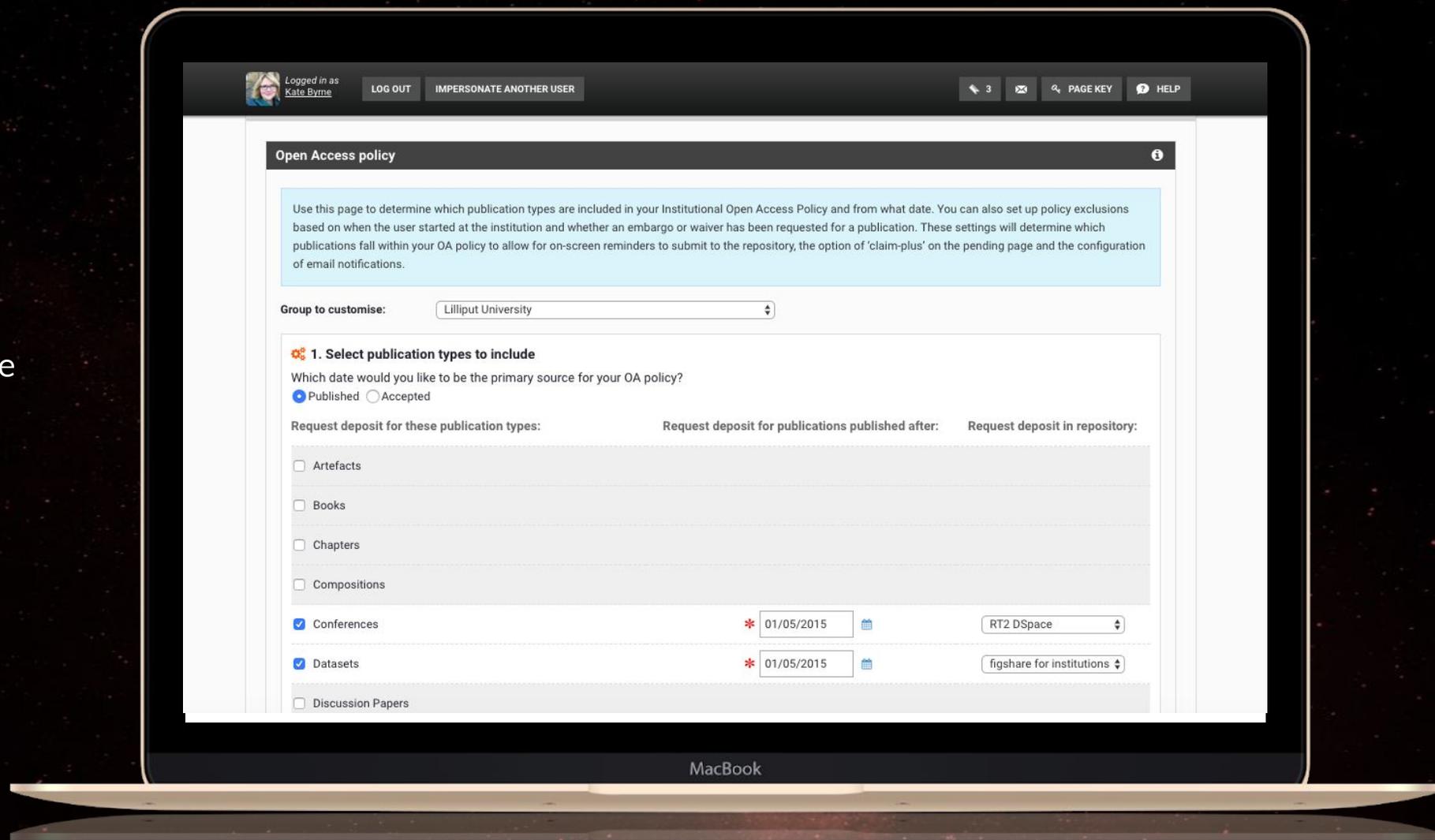
Adjust other integrations

In RT1 links between publications in Elements and publications in the repository existed at the 'object' level.

In RT2 these links exist at the record level.

Remember to adjust your other integrations to use the new RT2 fields or you will lose your links to the repository from your reports or profile system.
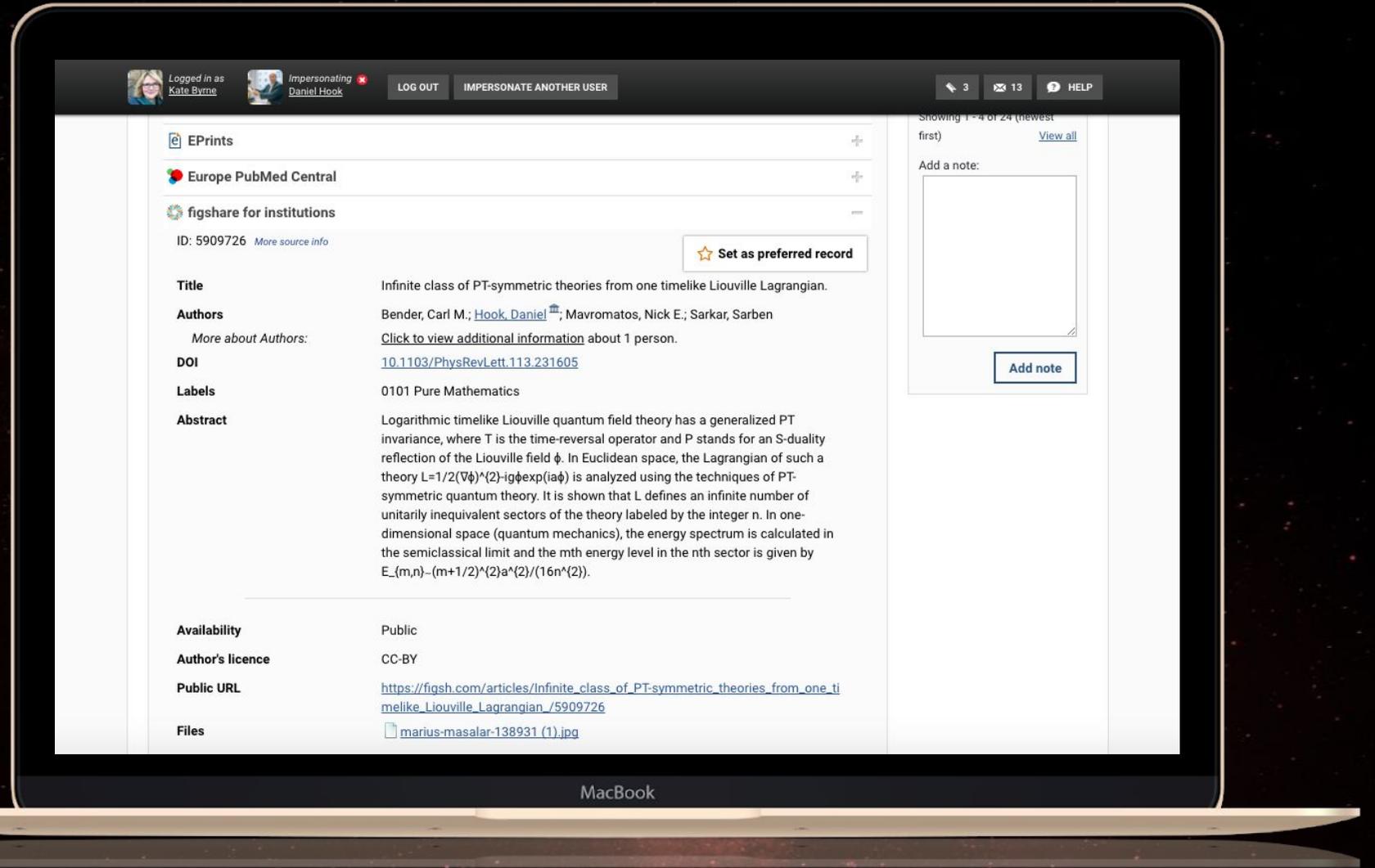
Plan cutover and go-live

Communicate the planned outage

Configure your RT2 connection (but don't enable)

Transfer RT1 links and start RT2 harvest

Suspend RT1 integration & module access

Turn on deposit, give users access and go live!

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Key points to keep in mind

Migration not an upgrade

Need to plan a cutover

Two new crosswalks needed

Important to plan mappings

Self-migrate or use our service

Scheduling is important

Start by reviewing documentation

Check out the materials on our support site

Get all the right people involved

Think about knowledge and skillls you'll need

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Thank You

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