

1. Evaluate existing metadata structure

- **Reviewed** our **current metadata**, checking it against the Dublin core standard
- Added “Location”, “Format”, “Collection”, and separated “Keywords” from existing “Photo Description” field and “image title”

2. Select a new content management system

- **Drupal** is a very **flexible** and **powerful** platform which was necessary for AIP’s diverse needs and audiences
- Our internal web development team could handle the **configuration** and **customization** that Drupal required

3. Evaluate current metadata quality; pricing structure

- **Cleaned up** fields **before migration**
- Made sure **only LOC-authorized terms** were included in our “Keywords” and “Location” lists
- **Verified** and **deleted** all duplicate name authority, “keyword”, “location” entries
- **New fields**: “Location”, “Format”, “Collection”, “Keywords”, “Photo Description”, “Image Title”
- Separated “Photo description” from “Keywords” field

4. Design a CMS that fits your needs

- **Redesigned** our cataloging and digitization **workflows** on the new CMS
- **New image uploading process** designed as a “one-stop shop”



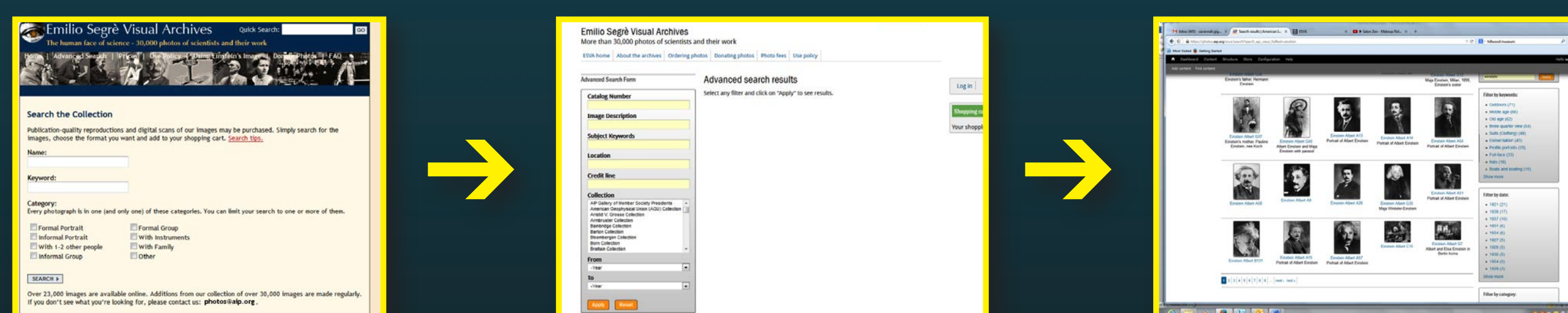
PICTURE THIS:

Migrating Metadata in Visual Materials Collections

Top Tips from Lessons Learned

- **Final migration means final**: Be clear about when the final migration is happening. If any metadata is updated in the interim it will be lost by next migration. Never update in between migrations.
- **Document tasks and team progress**: We had a Drupal “Basecamp” in which we communicated goals, progress, and deadlines. Use Google, a personalized wiki, or blog to record the choices made. If not, you will forget the thousands of steps you took during the migration process.
- **Write down or record all verbal decisions**: Phone and Skype conferences are good tools—but miscommunications can happen in big projects when deadlines and to-dos are based on memories, not print.
- **Test user accounts from every angle**: Be sure to try as many different user scenarios for searching and ordering as possible. There are exceptions to the rule you need to plan for—before they occur.

<https://photos.aip.org>



Our Timeline

2013

JAN

Research begins

MAR

Planning begins

JULY

Development begins

OCT

First migration

DEC

Final migration

2014

MAY

Final stage: Launch

5. Improve user search capabilities

- Chose Drupal modules that would **enable advanced search** feature
- Grouped images into **themed galleries**
- “Keywords”, “Location”, “Date”, and “Categories” **fields** were **hyperlinked** under each image record, bringing users to an aggregated page of results

6. Formulate a migration strategy

- **Updated** new metadata **fields** (20,000/25,000) **before migration**
- Created an **Excel spreadsheet** with all the data fields and how they would **map from Access database to Drupal** content
- Worked out what needed to be **translated** (comma-delimited lists of keywords, personal names, etc.); **wrote functions** to translate into **new format** for content management system

7. Migrate data

- **Migrated** a small **test set** of records (A through B); verified the migration results (approx. 1,000 records)
- **Evaluated results** by testing: Batch upload > testing > evaluate, then **repeated process**
- Eventually, **completed final migration** of 25,000 image records

