U.S. Department of Transportation
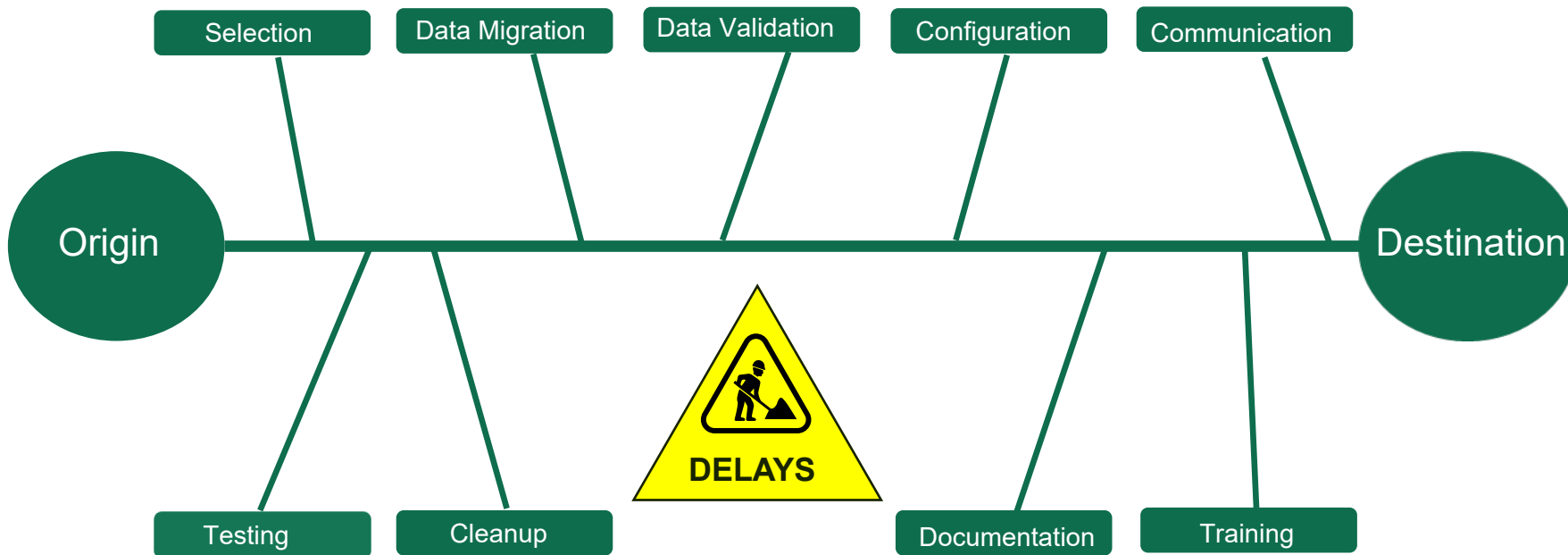
Changing Platforms:
A Repository Migration Itinerary

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Beth Burnett, Metadata Librarian, National Transportation Library
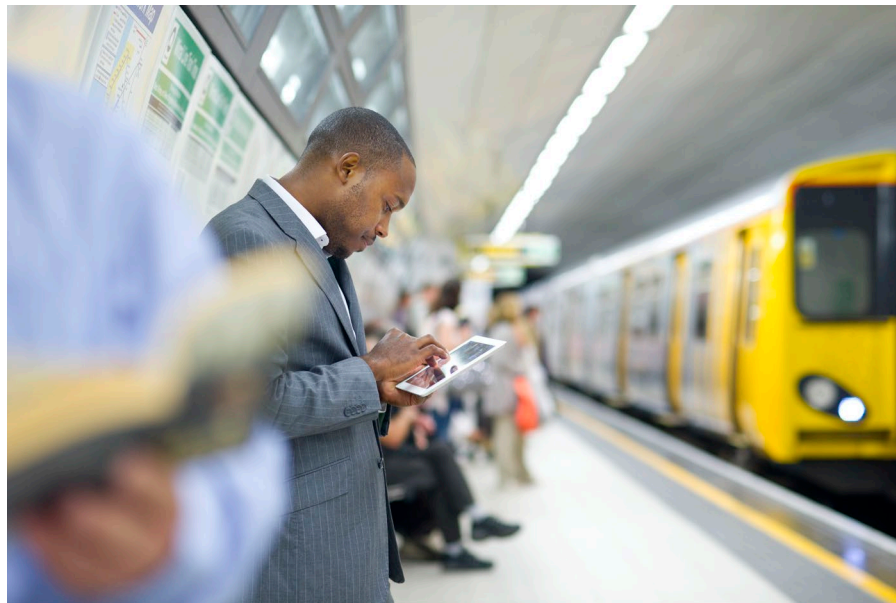
Itinerary

ROSA P – the Repository and Open Science Access Portal – is migrating to a new digital repository platform, aiming to improve functionality and features for both the front and back end. The journey to a new repository requires careful planning to ensure the community of stakeholders reaches the destination with minimal disruptions.

Map

Origin

The Current ROSA P System

- Homegrown, aging cataloging platform
- Non-integrated public interface managed by an external agency
- Lacks essential features and functionality for repository best practices like self-deposit, public facing metrics
- Lacks authority file functionality
- Inadequate storage for large files like datasets and videos
- Prone to glitches with exporting citations, series records, and searching
- Limited ability to customize homepage and organize content

Select a System

Pick a Destination

- Develop a list of requirements for the new system
- Get buy-in from stakeholders
- Research available options
- Arrange for vendor demos
- Secure funding
- Statement of Work
- Request for Proposal
- Select a vendor
- Kickoff meeting

Metadata Cleanup

- Analyze and clean up records with incomplete or inaccurate metadata
- Pull reports based on incomplete/missing metadata for required fields; records in a transitory (unpublished) status; records lacking files; duplicate records
- Ideally done before migrating data to the new repository
- Expect to have some cleanup after migrating data as you get more comfortable with the new system

Testing

Use the development environment or sandbox to test and write new workflows. Practice creating new records, editing records, batch cataloging, and withdrawing records.

Report bugs and issues to the developers.

Data Migration

Metadata records and digital content files are copied over to the new repository. Coordinate with Systems and IT teams at your library and with the repository developers.

Configuration

Add customized text, images, and settings to the repository

- Institutional logos
- Links to policies
- Information for users (About page, Contact information)
- Copyright and licensing information
- Submission instructions and agreements
- Select featured content
- Organize collections

Data Validation

Compare records:

- All metadata fields are present
- Correct files are attached
- The metadata matches exactly in the new and old records
- Links between records are preserved
- Series are present
- Collections are present
- Correct metadata fields displaying on the public interface
- Look at records while logged in and not logged in to see what changes

Documentation

Internal and External Documentation

- User guides
- Migration plan and timeline
- Updated workflows
- Training videos
- FAQs
- Instructions for routine functions
- Update URLs in your LibGuides, websites, printed material like brochures

Training

Catalogers:
- Create a new record
- Update an existing record
- Batch cataloging
- Review submissions
- Manage controlled fields
- Export metadata

Repository Administrators:
- Dashboard features
- Reports
- Manage collections
- Manage user accounts
- Manage configuration settings

Communication

Major tasks with communications:

- Who are the stakeholders?
- What is the message?
- What is the timeline?
- How will you deliver the message?

Delays

Expect delays!

- Testing reveals bugs that take time to resolve
- Data migration issues
- Staffing changes
- Funding uncertainties
- Shifting strategic initiatives at the organizational level

Destination

New Repository

- Integrated cataloging and public interface systems
- Improved workflows and efficiency
- Improved user experience
- Brings the repository fully back under DOT management

Further Reading

- Baird, L. & Meetz, J., (2022). "Digital Commons to Hyku: An Institutional Repository Migration at a Small Liberal Arts University", *Journal of Librarianship and Scholarly Communication* 10(1). https://doi.org/10.31274/jlsc.12916

- Van Tuyl, S., Gum, J., Mellinger, M., Ramirez, G. L., Straley, B., Wick, R., and Zhang, H., (2018). "Are We Still Working on This? A Meta-Retrospective of a Digital Repository Migration in the Form of a Classic Greek Tragedy (in Extreme Violation of Aristotelian Unity of Time)", *Code4Lib Journal* (41). https://journal.code4lib.org/articles/13581

- Littman, J., Giarlo, M., Mangiafico, P., Wrubel, L., Dushay, N., Collier, A., and Falcone, A. (2023). "Strategies for Digital Library Migration", *Code4Lib Journal* (56). https://journal.code4lib.org/articles/17290

Thank You!

Beth Burnett
natalie.burnett@dot.gov