**Guidelines for Preparing to Migrate Data
from Archivists’ Toolkit to ArchivesSpace**

1: Make a copy of the AT instance to be migrated and use it as the source of the migration. It is **strongly recommended** that you not use your AT production version as the source of the migration for the simple reason of protecting the production version from any anomalies that might occur during the migration routine.

2: Make sure your MySQL database is set up correctly, following the documentation in the [ArchivesSpace README file.](https://github.com/archivesspace/archivesspace#set-up-your-mysql-database) When creating a MySQL database, you **MUST** set the default character encoding for the database to be UTF8. This is particularly important if you use a MySQL client, such as Navicat, MySQL Workbench, phpMyAdmin, etc., to create the database.

$ mysql -uroot –p

mysql> create database archivesspace default character set utf8;

Query OK, 1 row affected (0.08 sec)

mysql> grant all on archivesspace.\* to 'as'@'localhost' identified by 'as123';

Query OK, 0 rows affected (0.21 sec)

Then, modify your config/config.rb file to refer to your MySQL database. When you modify your configuration file, **MAKE SURE** you specify that the character encoding for the database to be UTF-8 as illustrated below (the following should be all on one line):

AppConfig[:db\_url] = "jdbc:mysql://localhost:3306/archivesspace?user=as&password=as123&useUnicode=true&characterEncoding=UTF-8"

There is a database setup script that will create all the tables that ArchivesSpace requires. Run this with:

scripts/setup-database.sh # or setup-database.bat under Windows

3: Review your source database for the quality of the data. Look for invalid records, duplicate name and subject records, and duplicate controlled values. Irregular data will either be carried forward to the ArchivesSpace instance or, in some cases, block the migration routine.

* An AT subject record will not migrate if it does not have a valid AT type statement. You can use the AT Lookup List tool to see what subject types are not valid and to change invalid expressions to valid expressions. Any term in the AT list of subject term types that does not match one of the six terms in the screen clip below will need to be transformed to one of those six terms.


* Record audit information (created by, date created, modified by, and date modified) will not migrate from AT to ArchivesSpace. ArchivesSpace will assign new audit data to each record as it is imported into ArchivesSpace.

4: Select a representative sample of accession, resource, and digital object records to be examined closely when the migration is completed. Make sure to represent in the sample both the simplest and most complicated or extensive records in the overall data collection.

5: While the following assessments have no direct bearing on the actual migration, they may help you understand better the workload associated with migrating the data, as well as determine the optimum time for conducting the migration:

1. How will the migration affect your current ability to generate metadata records such as EAD and MARCXML for resources and METS, MODS, Dublin Core, and MARCXML records for digital objects?
2. How will the migration affect your current ability to generate reports of the data?
3. To what extent will the migration require you to revise any stylesheets you use for rendering AT data?

6: Increase the maximum Java heap space if you are experiencing time out events. To do so:

1. Stop the current ArchivesSpace instance
2. Open in a text editor the file “archivesspace.sh” (Linux / Mac OSX) or archivesspace.bat (Windows). The file is located in the ArchivesSpace installation directory
3. Find the text string “-Xmx512m” and change it to “-Xmx1024m”.
4. Save the file
5. Restart the ArchivesSpace instance