

Migration to Drupal 9



9 Crucial Steps for a Successful Migration to Drupal 9

NORTHERN ×  **Drupal™**

Overview

Whether your digital experience is built on Drupal 7 or you have recently launched on Drupal 8, it's important to upgrade to Drupal 9 to benefit from the latest updates in functionality, accessibility, and security measures. This eBook will provide insights into our process, and some actionable steps that you can take to get ready for a migration to Drupal 9.

1. Establish Clear Goals
2. Conduct UX Research
3. Perform a Content Audit
4. Define Your Content Types
5. Choose a Drupal Expert
6. Keep up with Routine Maintenance
7. Talk about Yourself in Your Customer's Language
8. Prioritize Your Backlog
9. Futureproof Your Drupal 8 Website

If You're Still on Drupal 7 or Earlier

Get your sights set on Drupal 9 and start planning. You are going to love it! There are so many features in Drupal 9 that will greatly enhance your platform for users and optimize functionality for developers and authors, while in parallel help to facilitate the upgrade pathway to Drupal 10.

If You Already Have a Drupal 8 Site

The transition from Drupal 8 to Drupal 9 is a natural progression and doesn't mean a wholesale change. If your organization has a Drupal 8 site and you keep your modules updated with minor update releases, you will be able to hit the ground running with little to no additional work to update to Drupal 9. Many of our clients are already in the midst of this transitional timeline for their digital solutions.





Establish Clear Goals

Think about your institution's strategic goals and priorities and how the website helps support them, and create measurable, realistic success metrics for the site. While you have many, many tools in your toolbox, everything should ladder up, or support, the overarching goals. Outlining these types of measurables at the outset of a project (and always referring back to them) can help keep a project-focused.





Conduct UX Research

Would you write a research paper without doing actual research? Probably not. The same should be said for building your website. Think about what it is your users need, how they use your site, and what will make their lives easier. Better yet, ask them!

With any user experience efforts, the most important key to success is ensuring that you ask the right questions that get the right answers. Too often, companies want to ask the questions designed to get the answers they want, or to justify a predetermined path. In those cases, companies find they end up developing a poor user experience that doesn't meet the needs of its clientele, simply because the client's needs are the primary determination of success.

In a true, customer-focused user experience process, the questions must remain agnostic

(avoiding any bias towards an internally preferred solution). To achieve that, avoid scripting interview questions and focus on those tasks that represent the vast majority of the actions that your users take (or will want to take) on your site.

Some types of UX research include:

- Focus groups
- Surveys
- Card sorting
- First-click testing
- Accessibility testing



Perform a Content Audit

If you were moving, you wouldn't move absolutely everything - while you're packing, you determine the things you no longer need or that you want to replace. Why pay to move something that you're just going to throw out later? The same goes for your content.

Complete a Redundant, Outdated, Trivial (ROT) analysis of your content before migration and you'll be prepared for our next step - defining content types. How do you assess content quickly?

Remember **TRUST**: *Timely, Relevant, Understandable, Significant, and Targeted*.

Timely

Is the information up-to-date and current? If the information is good, there's no need to rewrite it, but you may want to repurpose it or draw new attention to it with a social media or blog post.

Relevant

Does the information still matter to your users?

Understandable

Can the average reader quickly scan the content and understand the key messages? Density of content can also be an issue, especially online.

If your content is valuable but too dense, can be broken down into bullet points, infographics, or multiple articles?

Significant

Do people care about this content? Page view statistics allow you to see what kind of traffic your site is receiving for specific pages. If content is Timely, Relevant, and Understandable, but is not receiving the traffic that your reviewer feels it should be receiving, then it may be an opportunity to look at how that content can be repurposed, presented in another area, or changed to more user-friendly language.

Targeted

One of the key tenets of content curation is to provide content that is relevant to your customer-base. You want your customer to find themselves reflected within your content.



Define Your Content Types

After you have completed the foundation, you are ready to build on top of it. Everything starts with structure. In terms of import, it's the structure of your content types and fields and structure of your source files. Site building should be done and all content types should be well defined before you start coding.

Think not only about separate content types but also about the content types' "ecosystem." Relationships between content types and taxonomies are very important as imported data may need to be migrated into multiple content types or have taxonomy terms attached. The relationships should be dictated by the desired functionality and taken into consideration when building the import.

A photograph showing the backs of two people sitting at a desk, looking at a laptop. The laptop screen displays a website with the URL 'archiproducts' and several images of modern furniture. The background is a bright window with a wooden frame.

Choose a Drupal Expert

Partnering with an outside Drupal development firm will help your internal web team manage this task. An ideal Drupal team understands your organization and can help your organization achieve its goals, execute its vision, and provide the best value for your budget.

Look for a firm that has experience in your industry, employs several Acquia-certified Drupal developers, and is active with a good rating in the [global Drupal community marketplace](#).



Keep up with Routine Maintenance

Drupal 8 will be end-of-life by November 2021. So what does that mean?

Well, whether you're talking about a vehicle or a website, ensuring that routine maintenance is regularly performed can contribute to a smooth path. And when it comes to making sure the job is done the best way, it pays to call in the experts — which is why Northern's service level agreements are so valuable. And with the announcement of the deprecation of Drupal 7 (2022) and Drupal 8 (2021), that support will help ensure a smooth transition to Drupal 9.

We also recommend completing a module audit (some call this a 'deprecation check'). Make a list of your site's current modules and check which ones are already compatible with Drupal 9. The Drupal wiki has shared a document detailing deprecation check and correction tools for Drupal 9 readiness. Any that are not compatible will either need to be updated or deprecated, depending on their use. When examining existing modules, if the module is not currently compatible with Drupal 9 you have a few options:

- Check to see if there is an existing patch available. More popular modules are more likely to have already been patched. If a patch exists, try the patch on your website. If the patch works, you can comment about your success in Drupal.org for that patch and it will become more likely to be integrated into Drupal 9.
- If no patch currently exists, consider creating an Issue, patching the module, and then commenting if it works to help it get closer to Drupal 9 ready.
- You may also consider swapping modules for newer and more feature rich options, where available. A module that is Drupal 9 ready may exist to serve the same purpose.



Learn to Talk about Yourself in Your Audience's Language

Organizations often develop an internal vocabulary that can become disconnected from how their customers talk about and their products and services. It's important to always use the customers' language on a public website, rather than high-level language from your mission, vision, and values statements.

Instead Of:

- Registrar's Office
- Office of the Registrar

Try:

- How to Apply
- Applications
- Register for Classes
- Course Registration



Prioritize Your Backlog

In the lead-up to a major website overhaul, an organization often collects a substantial “wish list” of improvements they want to see on their website. Collecting these wanted improvements and prioritizing them with key decision makers can be instrumental in making sure the site provides not just a technology update, but a leap forward for all its stakeholders.



Future Proof Your Drupal 8 Website

To be ready for Drupal 9, here is your to-do list, most of which you can achieve with [Upgrade Status](#).

1. Make sure your hosting environment is compatible with the [updated requirements](#) of Drupal 9.
2. Upgrades are supported from Drupal 8.8 and 8.9. Update to the latest Drupal 8 version available. Updates for themes could also be needed; the Upgrade Status module will be able to check for you.
3. Keep your contributed projects up to date. Most contributed projects resolve Drupal 9 compatibility issues gradually, while also keeping Drupal 8 compatibility.
4. Remove deprecated API use in your custom code. [Rector](#) will help resolve a big part of these automatically.

Tools to Help You Accelerate Your Upgrade to Drupal 9



[Acquia Migrate](#) can accelerate Drupal 7 to Drupal 9 migrations by up to 80%, with a migration workspace pre-built on a cloud environment and pre-loaded with the Drupal 9 code base. It includes a module recommendation engine to suggest Drupal 9-ready replacements for the modules you're using today, and an intuitive migration UI to make it easier to get your content moved over quickly. You'll be able to view your progress and any errors encountered during migrations in one centralized migration dashboard. This includes the ability to view the before/after values as well as a rendered preview, before importing content with a migration preview.



[Acquia Site Studio](#) can help with creation of a quicker Drupal 9 ready theme. It's great for a Minimum Viable Product (MVP) approach, which includes a theme that's not fully-customized right away but that can be done over time while allowing developer to focus on the functionality of Drupal 9 more urgently. With 70 pre-built components in a visual component library, and the ability to create your own component templates, pages can be more easily rebuilt using existing components that are already styled according to your organization's brand guidelines.

ACQUIA

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Acquia's tools allow organizations to not only create sites faster, but also enable non-developers to work with low code tools. The result is that more of the team can contribute, allowing IT to focus on innovation while still delivering a better result in less overall time.

RON NORTHCUTT

Director of Developer Advocacy



Final Thoughts

With Drupal 10 already on the horizon for an anticipated launch date of mid-2022, there's no time like the present to prepare by migrating to Drupal 9. Why not wait for Drupal 10? The gap to Drupal 10 to previous versions of Drupal will only be wider than the gap from Drupal 9, whereas the gap between Drupal 9 and Drupal 10 will be minimal. Versions of Drupal from 9 and forward will be built for backwards compatibility — that means each version is related closely enough to its previous version to act as a stable foundation.

Our team of experts can help your organization through the process and deliver an effective digital experience for your audience.



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