Slide 1:
Good afternoon, everyone, I’m Debbie Roth, and my pronouns are she/her, at the Woods Hole Oceanographic Institution. I’m the repository manager of the MBLWHOI Library. The Library’s Institutional Repository (IR), is a CoreTrustSeal certified repository. The mission of the Woods Hole Open Access Server, WHOAS is to capture, store, preserve, and redistribute the intellectual output of the Woods Hole scientific community in digital form. The community represents: Marine Biological Laboratory, SEA Education Association, NOAA Fisheries, USGS Woods Hole Coastal and Marine Science Center, Woodwell Climate Research Center (formerly Woods Hole Research Center) and WHOI.

Slide 2:
The MBLWHOI Library’s Institutional Repository (IR) is a DSpace repository. We are migrating from version 5.6 to 7.2. One reason we chose to wait to upgrade to 7.2 because we wanted to wait for the 7.0 and 7.1 bugs to be fixed and we wanted some of the new 7.2 features.

A few examples DSpace 7 features are:
• As an administrator, the entire administrator toolbox is always immediately available
• Submissions have been completely redesigned; you can drag and drop the file for your submission at the top of the form and instead of filling out each field by hand, you also have import options, for example you can import metadata from other sites such Pubmed
• The submission form now uses a single page design instead of multiple pages.
• Administrators are now allowed to kick off particular back-end actions that were previously only available to system administrators with command line access to the server.

The 7.2 features we wanted are:
• The ability to support "Browse By" configurations for custom browse options
• The ability to view your groups in your user profile page
• The ability for an entire item to be embargoed instead of only individual bitstreams/files
• The ability to make an item "private" during submission
• Allow the Simple Archive Format (SAF) builder import to support entity/relationship creation

Another reason for migrating is that January 1, 2023 DSpace 5 will no longer be supported by Atmire. Atmire is our DSpace service provider.

This presentation discusses our migration and takeaways. I planned on demonstrating our new 7.2 repository, but we have encountered some unexpected delays. We were supposed to go live by the last week in November, allowing me to demonstrate our live site, or at least our test site. However, these delays mean that the test server is not yet complete, so I'll be showing screen shots from the test server.

This slide shows our current WHOAS home page version 5.6 including the footer.

Slide 3:
Our original timeline is listed here. We started the process in August with the expectation of going live in November.

This what our new home page will look like. The DSpace 7.2 user interface was completely redesigned, and we went from XMLUI – Mirage 2 to Angular. It’s a much cleaner interface, which we hope will better serve our users.

As part of the migration, Atmire will customize the standard DSpace look and feel to be consistent with the institutions’ branding, including color, fonts, and logos. We decided on minimal customizations with a look similar to DSpace Express including the search box over an image. This gives us a more modern look and highlights our most popular collections and useful entities. We chose descriptive icons to appear below the search box highlighted in red, to direct users to these collections. Although, all
collections can still be accessed from the home page. Our footer also has been customized to match our footer on our library webpage.

The project manager worked with us over a few weeks to plan out the fields we wanted to include in our entities and how the entities should relate to publications and datasets. Over several meetings, we were able to work out exactly which properties should be included on the related entity pages, and in search result filters.

**Slide 4:**
We leveraged two entities as part of our migration. Person was an existing entity, which worked well with our existing custom editable authority control functionality. We also included a Cruise entity because that is another important concept for our collections.

**Slide 5:**
An entity is a DSpace item that has a specific type. Relationships can be configured with entities of other types. Authors can be linked to articles, organization unit, project, cruise. This is an example of a People entity which shows the publications linked to them. The new person entity includes fields for identifiers, including ORCID. This will improve our ability to connect research and disambiguate authors.

**Slide 6:**
We also included the cruise entity. A Cruise represents a research cruise, usually operated by the University-National Oceanographic Laboratory System, also known as UNOLS. On these cruises, researchers collect data that will be published in the Rolling 2 Deck Repository. They will also publish papers, reports, and other datasets as an output of this cruise. This entity allows us to connect research from many outlets to our researchers' activities and their funding opportunities.

**Slide 7:**
Another upgrade feature is the redesign of the search results, as this slide shows. Previously, the search facets were an extra click at the top of the
screen and now they are immediately available on the left side. This should improve user experience and give the site a more modern look.

Slide 8:
We feel these are some of the most exciting features of version 7.

- New user interface with newly designed search box – easier to search
- Custom entities
- Custom model
- Migrating editable authorities
- Basic usage statistics

Content and Usage Analysis (Statistics) is a separate module that we chose to purchase. This records data about the addition of items, the number of page views and the number of file downloads. The module adds two tools to the DSpace user interface that allow an administrator to view the recorded data in the form of tables and graphs. These visualizations will be added to our home page for public viewing.

Our takeaways from this migration project are:
Plan on the issues coming up and the timeframe to be a few weeks longer than quoted. The new tentative timeline for us is to be live by the end of December.

Insist on weekly meetings. We had weekly meetings for the first 2 months, and we then went to bi-weekly meetings. This seemed to be where the communication and project timeline went off track.

To answer Joseph and Christine’s question, we do have a checklist and will be using it when we have a working test site.

Hopefully the challenges we’ve experienced will result in a smoother process for others down the line. The new system should perform more smoothly and allow for a better experience for users and staff alike.