Biz of Digital – Transitioning to a New IR Platform

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with a “new books” carousel, it also provided a “Research Starters” and Youtube videos that were related to the topic. We changed from III’s WebBridge to a new link resolver, “Full Text Finder,” which permits users to seamlessly link from an abstract in one databases to the full text article in another database. Additionally, I set up the Sierra Scheduler which is a tool used to update online catalog records in **EBS**CO EDS.

Last year, the library also migrated from **Innovative’s** IP Web Access Management (WAM) proxy authentication service to **OpenAthens (OA)** with “single sign-on” capability which offers off-campus users more reliable access to our resources. Along with myself, the migration team consisted of Assistant Director for Collection Management and the Computer Specialists. As the primary **OpenAthens** administrator, I will continue the ongoing maintenance and support. As we change the databases over to the “Athenized” URLs, we have developed much improved access to our database subscriptions by switching to the **Springshare** platform. Instead of having three webpages (Databases by Title, Databases by Subject, and Trial Databases), now the library features all three with annotations on one page. **Innovative Interfaces** moved its Sierra System to two new service options and required its customers to purchase one of the following options: Software Only (Hardware Migration), or Cloud-based hosting. We chose the Software Only with Hardware Migration option. I facilitated the transition of Sierra from a turnkey to a software only site. Now the library uses virtual servers located in the Information Technology Center to host Sierra, and continues the management and technical support for Sierra software on those servers.

When we were advised that ILLIAD was going off into the sunset and being replaced by a new service, Tipasa, the Interlibrary Loan Librarians and I underwent extensive training and finished the migration to the new platform, ensuring that the transition was seamless and glitch free for our main and downtown campus users.

In many cases at our library, the need to move the library forward technologically is identified by the Collection Management Department, because it is responsible for providing resources in ways that are accessible to the students, faculty and staff in the teaching/learning process. To make these changes, it must keep a strong and productive relationship with the Systems Department, because that is where the knowledge and expertise is to make new products and innovations viable and effective. Systems and Collection Management are not just best friends because they have to communicate and frequently work together on projects. Like most true friendships, they get along well because they share the same personal goal: providing the best services to their patrons. 🐾

Biz of Digital — Transitioning to a New IR Platform

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Introduction

In August 2017, **Elsevier** purchased Digital Commons-**bepress**, motivating numerous institutions to explore and commit to options for leaving the popular institutional repository (IR) platform. The purchase took place soon after the **Oregon Health & Science University (OHSU) Library** decided to migrate from Digital Commons to a new IR platform. At the time the **OHSU Library’s** collections were primarily composed of electronic theses and dissertations, digitized historical materials, and one faculty supported journal of student work. We have about 10,000 items total in our collections and add about 200 additional items a year on average. Samvera, HP Trim, Alma Digital, Alfresco, and Extensis were all discussed as possible replacements for Digital Commons, however, Samvera was selected. Factors driving this decision, included requirements for displaying Historical Collections & Archives materials and a desire to invest in and contribute to an open source system. This article will describe several of the challenges the Library experienced during the process and the accompanying planning that occurred as a result of the move. Repository functions are a core function of the services the library offers to the **OHSU** community. Digital collections should serve as a showcase for the library’s expertise in preservation, discoverability, metadata quality, and attract new audiences to the work happening at **OHSU**.

Background

OHSU is Oregon’s only academic health center, and has 16,000 employees. **OHSU** is composed of the schools of Dentistry, Medicine, and Nursing. The College of Pharmacy is operated jointly with **Oregon State University** and the School of Public Health is shared by **Portland State University**. In fiscal year 2018, **OHSU** researchers raised \$462 million. The Library plays a vital role in campus activities. Librarians consult on literature searches for students, faculty, and staff, provide advisory services to facilitate successful research data management and scholarly dissemination, and teach within and outside of the curriculum. Some of the learning and research activities taking place at **OHSU** are documented within our institutional repository. Recently documented research includes projects produced by the **Interprofessional Care Access Network**

(**I-CAN**). This program is housed within the School of Nursing and brings together students from Nursing, Medicine, Dentistry, Public Health, and the College of Pharmacy to work as teams to help people from underserved communities access health care services. Project examples resulting from this program include, “Barriers to Obtaining a State Issued ID While Houseless in Portland” and “Intimate Partner Violence: A Bidirectional Relationship.” Additionally, in 2019, the Digital Scholarship and Repository Librarian presented to over 50 students in three different programs about contributing work to the IR.

The Library’s digital collections include 3,262 Electronic Theses and Dissertations (ETDs) and a range of digitized material from Historical Collections & Archives. However, the Library does not have a formal policy for digital collection development. This poses challenges for outreach, metadata planning, and technology development

decisions. Currently, the outreach strategy is based on serendipity, established connections, or opportunities that arise from campus events and initiatives. With a detailed and vision-driven digital collections development policy, the **OHSU Library** will be able to create a targeted outreach strategy that reflects our institution’s goals for curating, disseminating, and preserving its work and research. The absence of a collection development policy also creates problems in terms of knowledge transfer. For example, the librarian who initially led the Library’s migration to Samvera left her position early in the process. The Library’s current Digital Scholarship and Repository Librarian joined after the process was underway.

The Transition

The Library’s transition from Digital Commons to Samvera took place in the winter of 2018-19. First, we migrated the ETDs and then collections like *Public Health in Oregon: Discovering Historical Data* followed. While librarians learned about Samvera, ETDs were the most straightforward material to move. The systems librarian doing the programming to execute the move reported back to a cross-departmental Digital Collections Committee. Early in the process, some challenges of moving out of Digital Commons were addressed. For example, Digital Commons is specifically

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designed and has features to support journal publishing and, as noted above, the Library's collections included a journal of student scholarship. Rather than investigating and implementing a new journal platform during the migration to Samvera, the Library's Digital Collections Committee decided to implement a temporary solution for hosting the journal on our Drupal based website, resulting in some loss of functionality. Especially significant was the loss of document-level metrics like downloads and social media activity. These metrics add value to our repository and publishing services, and help the Digital Scholarship Library recruit new content for the Library's collections and demonstrate the benefits of open scholarly communication. At **OHSU**, making Samvera fulfill that goal requires relationship building. One of the institutions in the Northwest Samvera User Group announced that they received grant funding to solve the absence of research metrics in Samvera, and when the code for creating metrics is developed, it will be shared with the full community.

Discussion about SOLR, a Java open source search platform, focused on what facets to hide and how they should be ordered. We realized early in the process that our users (including individual authors and educational programs) wanted to display and navigate our collections in ways that our existing metadata strategy and the search/display functionality did not satisfy. SOLR indexes, understands the search terms a user selects, maps the search query to the documents, and ranks the returned results. Challenges in adding additional metadata fields also arose. Communication around providing for stakeholder needs and what they want from digital collections became essential.

Early in the transition process, the **OHSU Library** realized they were not running the newest version of Samvera. The newer version will include an International Image Interoperability Framework (IIIF) viewer for images that will enable advanced image interactivity for users. The **OHSU Library** was not able to perform that update in-house and contracted with San Diego based Notch8 to do that work.

Keeping track of new development tasks and maintenance issues became increasingly important during the transition. At first, we used a spreadsheet shared via Box to list these tasks, but this was not an effective way of monitoring tasks that needed to be accomplished, because it didn't generate active reminders. We looked for another option and then we transferred to using our in-house ticketing system that pinged our programmer and seamlessly kept track of the development of an issue. This proved to be much more effective.

Strategic Planning

In July 2019, the library conducted a strategic planning session related to digital collections. The goal of that session was to come up with a plan for developing and enhancing user focused digital collections. The session began by focusing on the audiences and

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core functions for digital collections. Openly disseminating **OHSU** research in the most user friendly way possible emerged as a vital goal. Digital collections at other institutions were reviewed, a SWOT analysis was conducted, and opportunities for collaboration with other institutions were discussed. The planning session highlighted that digital collections are an important way that academic research libraries distinguish themselves from other types of libraries. Short- and long-term goals were identified at the planning session. In the coming year, the Digital Scholarship and Repository Librarian and other staff engaged with digital collections will work on improving metadata so that users can access items more effectively.

As of October 2019, the upgrade to the newer version of Samvera is undergoing review by **OHSU** librarians. Conversations are also taking place about what upgrades to the repository need to occur in FY2021.

Conclusions

A collection development plan would enable us to anticipate metadata needs and work within the community to create a user focused metadata strategy. We are currently in the process of developing the plan. Repositories provide access to exciting research and work generated within universities. An open source product can be dynamic and rewarding, but it requires ample local programming knowledge and a strong spirit of collaboration. 🐾

Rumors from page 52

for the month. There is lots in this report. I am just stressing a few items here. Among Paper formats, Board Books contributed \$17.5 million, an increase of 19.4% as compared to August of 2018. Hardback books were flat, accounting for 34.9%, coming in at \$230.7 million. eBook revenues decreased by 7.3% as compared to August 2018, coming in at \$86.3 million. Downloaded Audio increased 5.7% over the same month in 2018, coming in at \$43.9 million for the month.

<https://newsroom.publishers.org/association-of-american-publishers-releases-august-2019-statshot-report/>

**Melanie Dolech-
eck** (SSP Exec Director) shared pictures of her adorable new puppy **Harper**, who is an English/French mastiff cross. She's gonna be a big girl!

Boohoo! The perfect **Lolly Gasaway** retired from **UNC-Chapel Hill** several years ago but continued to write the **Copyright Questions and Answers** column for **ATG**! (She never missed a deadline and her columns were always perfect!). Unfortunately, this column in

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