

Local Loading

Scholars Portal has successfully maintained relationships with publishers for over a decade and continues to attract new publishers that recognize both the competitive advantage of perpetual access through Scholars Portal and the benefit of a secure and stable archive of their content.

The OCUL, Scholars Portal, and Publisher Relationship

Scholars Portal is an information infrastructure designed to support research, teaching, and learning in Ontario's universities. It includes a digital repository for journal, book, data, and geospatial content. The content is discoverable on the Scholars Portal Journal, Book, ODESI (data) and GeoPortal search platforms and is also indexed by Google and discovery systems.

As early as 1995 University of Toronto Libraries demonstrated the viability of local loading electronic journal content. In 2001, building on this experience, Scholars Portal was created by the Ontario Council of University Libraries (OCUL) to locally curate and deliver digital content to Ontario's university libraries. Member libraries and the OCUL Office work with publishers and other providers to license content and obtain local loading rights. Scholars Portal works closely with publishers to handle the technological aspects of content delivery, management, access and preservation. Over the last decade, OCUL has signed numerous agreements with the major academic commercial publishers and scholarly presses for local loading of journal and book content.

Scholars Portal is a service of OCUL.

- **Scholars Portal Journals** is a repository containing over 35 million full text articles drawn from over 14,000 journals with approximately 3000 articles added every day. The collection covers every academic discipline; from small societal publishers to the largest commercial academic, scientific and scholarly publishers. Many of the publisher agreements have been in place for over a decade. In addition to access on Scholars Portal Journals, content is also made available through links to publisher platforms.

The Scholars Portal Publisher arrangement has been mutually beneficial, providing easy, multi-publisher integrated access to full text articles for the Ontario university community. In turn, publishers have seen increased use of their content from the secure, reliable Scholars Portal digital repository and search platform.

- **Scholars Portal Books** repository contains over 176,000 full-text books from commercial academic and scholarly publishers in addition to over 398,000 books from the Internet Archive Canadian Collection and government documents. Scholars Portal also distributes vendor supplied MARC records to OCUL libraries to enable discovery through library catalogues. MARC records are modified by Scholars Portal staff to provide vendor and Scholars Portal book URLs.
- **Scholars Portal Data and Geospatial** repositories contain thousands of specialized statistical, survey, and image data files available through the Scholars Portal ODESI and GeoPortal platforms.

The Local Load Agreement

Local loading refers to the ability of Scholars Portal to keep a local copy of the full-text and/or metadata of licensed content on its servers, based at the University of Toronto, in perpetuity, for persistent access purposes. The objective is to obtain perpetual rights to archive the full text content and transform it, as technological standards change, to ensure access for future generations.

- OCUL has over a decade of experience licensing and providing secure repository and access tools and services to academic digital content of commercial and societal publishers. These resources have been negotiated and licensed through the OCUL consortium, the national Canadian Research Knowledge Network (CRKN) consortium, or by individual member institutions.
- The Local Load Agreement complements the content license by providing the rights for persistent, long-term archiving and access to licensed resources on Scholars Portal.
- Resources licensed for perpetual access will remain available on Scholars Portal in perpetuity.
- OCUL offers [model license](#) language for both access and local load agreements. These model licenses can be used alone or in conjunction with vendor or consortia licenses offering maximum flexibility and security in ensuring and articulating proprietary rights.

Find OCUL's model licenses: www.ocul.on.ca/node/114

Scholars Portal Preservation and Security Commitment

Scholars Portal has developed processes and infrastructure based on sound preservation practices and the Open Archival Information System (OAIS) standard. Through active monitoring of our collection and the migration of endangered file formats over time, Scholars Portal is committed to the long-term preservation of the intellectual content of the objects in its archive.

As of February 2013, Scholars Portal Journals has been certified as a Trustworthy Digital Repository by the Center for Research Libraries, only the fourth organization in the world to achieve this goal.

Scholars Portal ensures the long-term viability and security of content in its care by:

- Maintaining an actively updated account of all articles archived in the platform. This accounting is specific at the file level, and all files in the archive are actively monitored to ensure they remain unchanged and uncorrupted.
- Tracking the history of preserved objects, and maintaining a record of any changes or processes that have acted on these files, thereby establishing their history and authenticity.
- Employing secure authentication and entitlement processes to restrict access to users at licensed institutions. Implementing Digital Rights Management on any entity when necessary to restrict the number of concurrent users or limit the type of use.

The Scholars Portal Technology Platform

Scholars Portal manages over 100 TB of publisher data on more than 50 servers.

- Our main data volumes reside on a storage area network (SAN) developed by Oracle. Multiple points of redundancy ensure the high availability of the content.
- Our data is subject to a rigorous backup regime, and copies of these backups are stored both on campus and at a secure remote facility.
- The OCUL and Scholars Portal offices, network and server room are housed in a restricted, secure access area at the University of Toronto Robarts Library.

Scholars Portal Journals receives content from over 30 different sources; managing data feeds in both “push” (you send the data to the Scholars Portal Server) and “pull” (Scholars Portal downloads the data from your site) modes.

- All data transfers are done securely and managed separately for each publisher. All servers are maintained behind a secure firewall.
- The publisher’s original data deposit is stored permanently at Scholars Portal.
- Each publisher dataset is transformed to a common metadata and full-text XML format and stored in our XML repository based on software from MarkLogic.

The Scholars Portal team, consisting of a mix of librarians, programmers and systems support specialists, works in cooperation with IT specialists at the University of Toronto to ensure stable and secure access to publisher content.

- The University of Toronto network control center runs regular audits of all Scholars Portal servers, looking for vulnerabilities and abnormal traffic activity.
- Scholars Portal maintains their own server analytics to track changes in use over time.
- Scholars Portal uses Nagios for server uptime monitoring and systems staff is available on call 24 hours per day, 7 days per week.

Publisher Considerations for Local Loading

Local loading on Scholars Portal increases visibility of publishers' content, which leads to increased use.

- Counter-compliant consortial level usage statistics from the Scholars Portal Journals platform will be provided on request to the content provider on a semi-annual or annual basis.
- Book and Journal content in XML, PDF, and EPub formats is accepted.
- The initial archive content can be delivered by portable drive or FTP with ongoing content updates delivered by FTP at timelines negotiated at the time of signing the Local Load Agreement.
- The metadata for books includes cover images for each book and MARC records. The [OCUL Ebook Template](#) provides specifications for MARC records.

Find the OCUL Ebook Template: www.ocul.on.ca/node/114

Contact: Carol Stephenson, OCUL Projects Officer | **E:** carol.stephenson@ocul.on.ca | **M:** +1 519 501 5358
Learn more about OCUL & Scholars Portal: www.ocul.on.ca www.scholarsportal.info