

Report to the OCUL Directors

May 2018

Scholars Portal
A Service of the Ontario Council of University Libraries

Introduction

The following report describes the activities of Scholars Portal over the period of May 2017 to April 2018. The themes covered in the report include new platforms and new services as well as research activities and partnerships between Scholars Portal and OCUL libraries.

Much of the year was taken up with moving two large projects to production: one, a new hosted preservation service for OCUL libraries called Permafrost, and the other, a redesigned Scholars Portal Books platform. Librarians, developers and systems staff from across the team have been working over the last several months to meet our re-release deadlines for 2018 for these two services.

Enhanced support for research data management was also a priority this year. Many OCUL libraries have been developing services and support programs for RDM, and over the last few years Scholars Portal has been exploring ways we might help those libraries. This year, for the first time, we have been fortunate to have a dedicated staff position for RDM support. A new Scholars Portal RDM Librarian, hired in a partnership with Queen's University Library and located in Kingston, joined the Scholars Portal team in 2017.

Semantic data applications are becoming mainstream. Over the last year, Scholars Portal staff have been exploring how we might use semantic data to enhance discovery of scholarly content. Semantic data will allow us to characterize that content more effectively by identifying and recording relationships using established vocabularies and ontologies, connecting that content to the broader world of scholarly information. In this report, we will describe some pilot projects in this space that we will be pursuing in the coming year.

Two national discussions about shared library services have engaged Scholars Portal over the last year. One discussion, led by the CRKN Trusted Digital Repository (TDR) Task Group, has been exploring how the Scholars Portal TDR might serve the needs of CRKN members and how that might be realized. The second discussion, led by the Dataverse North Working Group of Portage, has been concerned with developing a national community of practice around Dataverse, including a common hosting service provided by Scholars Portal.

Scholars Portal was also pleased this year to join OCUL libraries in celebrating the 50th anniversary of the consortium. Happy birthday OCUL, with best wishes for many more years of innovative leadership.

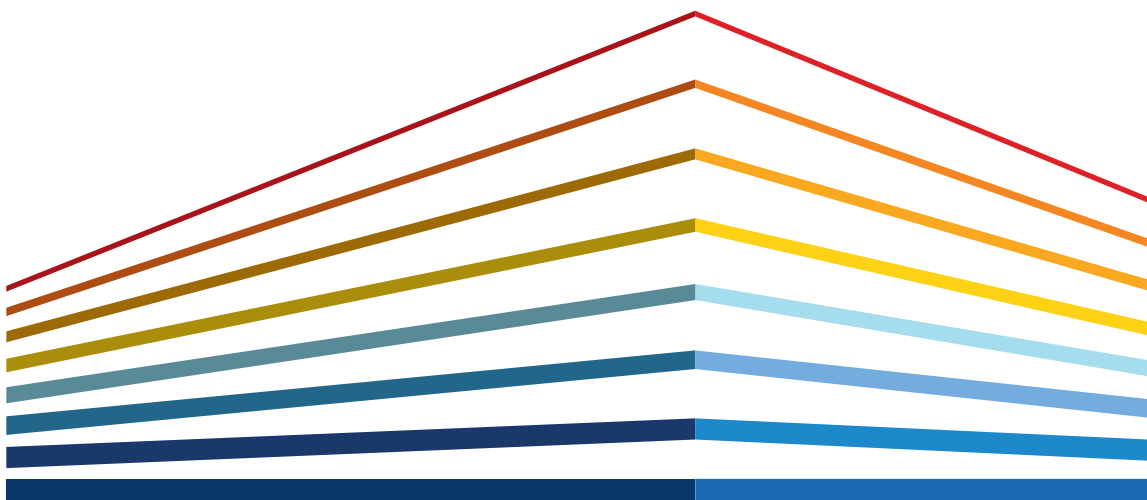
New Platforms & Services

Permafrost Preserves Your Digital Content from Bit Rot

Permafrost is a new Scholars Portal service that offers a suite of tools and resources to enable OCUL members to process valuable digital assets for long-term preservation. This new opt-in service addresses a need among many OCUL member libraries for access to hosted preservation services in the absence of local infrastructure and support for digital preservation. Based on the Archivematica suite of open source tools, and linked to the Ontario Library Research Cloud, Permafrost is designed to support the varied preservation workflows of libraries and archives.

Permafrost was collaboratively developed through a pilot project with several OCUL libraries. Lakehead University Library, our first pilot partner, started testing the service in January 2017. Four more OCUL libraries joined a second phase that ran from September 2017 to April 2018. Partners in this phase included the University of Waterloo, Wilfrid Laurier University, the University of Ontario Institute of Technology, and the University of Toronto via UTARMS (University of Toronto Archives and Records Management Service).

Participants processed and stored over 40 GB of data during the pilot and helped



Permafrost

Scholars Portal staff understand the resource requirements of running a hosted preservation service. Over the course of the year, the Scholars Portal Digital Preservation Librarian conducted a needs assessment, including readiness interviews, with each new member, developed service documentation and communications materials, including a service website and workflows and guidance for participants, and organized and hosted an Archivematica training day for OCUL members on October 20, 2017.

A business model for Permafrost, including pricing, was also prepared and approved by the OCUL Directors at their November 2017 meeting. Permafrost will move from pilot to production in May 2018, with staff converting pilot sites to production use over the summer. New clients will be able to join starting in the fall of 2018.

For more information about Permafrost, including pricing, please visit the Permafrost website at

<https://permafrost.scholarsportal.info>

A Fresh Start for the Books Platform

In 2018, Scholars Portal will be replacing its first-generation Books platform with an entirely new application. Designed and developed in-house, the new platform will create opportunities for tighter integration with other Scholars Portal services. It will also share the same architecture and infrastructure of core services like Journals, allowing it to scale easily to meet future demands.

A bilingual public beta site, released in May 2018, is available to all OCUL users at

<https://booksbeta.scholarsportal.info>

The full production release is scheduled for the fall term of 2018. Work on the platform was made possible with funding from OCUL's New Initiatives Fund.

Features of the new platform include:

- Fast searching across standardized metadata
- Smooth HTML page scrolling, with a more consistent display across different types of books (e.g. XML and PDF)
- In-browser concurrent use monitoring (as an alternative to Adobe Digital Editions)

To date, we have loaded over 175,000 commercial texts from over 50 major publishers, including 15 Canadian university-affiliated presses and over 30 international university presses.

Scholars Portal Books | beta

My Books 0 Contact Français ACE

Overcoming conflicting loyalties: intimate partner violence, community resources and faith
 Sevcik, Irene; Rothery, M. A.; Nason-Clark, Nancy; Pynn, Robert
 The University of Alberta Press, 2015

+ Add to My Books

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 This book is limited to one reader at a time.
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3
 FaithLink
 Building Connections between the Sacred and the Secular

INTRODUCTION
 Addressing the phenomenon of intimate partner violence (IPV)—preventing its occurrence, responding to and assisting its victims, holding accountable and offering treatment to those who act abusively, and arresting its intergenerational continuance—requires a multifaceted and well-coordinated community response. Given that religious communities are affected by IPV, and that they are part of the fabric of our society, the question of whether they should—or can—be included in any broadly based community response raises both fundamental and practical questions. How can they be engaged? What role can they play? What is their level of awareness of IPV? Would their responses to victims and those who act abusively be in line with those of secular service providers? Can the differences between religious and secular perspectives be bridged? Do religious communities in fact have a role in how a secular society responds to social issues?

The FaithLink program arose from discussions aimed at mounting a coordinated community response to IPV and was charged with the task of engaging religious communities in this effort. In fulfilling its mandate, FaithLink came to the conviction that not only can religious/ethno-cultural communities' become part of a transdisciplinary response model but that they must. They have a critical role to play in how their communities and individual members

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Making DRM Mean Something Other than “Don’t Read Me”

Electronic books are often restricted by the publisher in terms of downloading, printing and copying. Digital rights management (DRM) -- the enforcement of these kinds of re-strictions -- can be implemented in such a way that it discourages even the most deter-mined readers from getting the books they need.

In developing the new Books platform, Scholars Portal programmers made a concerted effort to make the enforcement of DRM restrictions as painless as possible. Key innovations include (1) clear and consistent disclosure statements about what a user can do with any particular book based on the license signed by his/her library and (2) implementation of all DRM restrictions in the browser-based reader rather than an offline reader. This means that users wishing to access DRM-restricted content do not need to download a separate software package or sign up for a user account. For those who do prefer an offline reading experience and are willing to download a reader and sign up for an account, we have maintained as an option three-day book downloads using Adobe Digital Editions.

Metadata Harmonization

We receive book metadata from publishers in many proprietary formats. And even when metadata arrives in a standard format, it always has quirks and particularities. Take the humble MARC record. How and where keywords are recorded, where a print or an on-line publication date will appear, and how different ISBN types might be identified are choices that are handled differently from publisher to publisher. This can cause issues for searching that need to be addressed through a process of normalization. Much of the development work for the new platform involved data normalization of content from dozens of publishers.

For each publisher, the Books metadata team developed a crosswalk mapping used by programmers to transform the publisher provided metadata into a standard markup schema based on the Book Interchange Tag Suite or BITS. BITS is the partner standard to the Journal Archiving Tag Suite (JATS), which is widely used in the scholarly journal publishing community. While BITS is a relatively new standard compared to JATS, we expect it will gradually be adopted by the scholarly book publishing community for exchanging books metadata. It was, in fact, recently chosen as the standard to be used by the European Union's Publications Office.

Having all of our metadata in BITS has many benefits:

- With consistently mapped metadata elements, it is easier to search across publishers and to group content by series, date and other categories
- Standardized metadata is preservation-friendly
- Because our journals content is loaded in the related JATS standard, there are opportunities for future integration of the two types of content
- Having metadata in a recognized and standardized format will allow us to represent book content more easily as semantic data, and so connect books to linked data sources like Wikidata

Administration Dashboard

Libraries buy books in a number of ways. Acquiring big packages from a publisher which is then renewed annually is one model. Acquiring individual titles selected from packages or customized subsets of packages based on subject interests are other, increasingly common models of purchase, which make tracking entitlements tricky.

The new Administration Dashboard, where collections and entitlements are managed, allows Scholars Portal staff to capture information about the variety of purchase models we now see and is flexible enough to support new models not yet imagined.

The new Dashboard will eventually be available to e-resource staff at member OCUL libraries to use for these tasks:

- checking which collections their school is entitled to
- generating title lists for any collection or sub-collection
- generating a COUNTER report for any collection or sub-collection
- downloading packages of MARC records for any collection or sub-collection

Ontario Library Research Cloud – Our First Full Year of Service

The Ontario Library Research Cloud (OLRC) is a distributed object storage service developed and managed by Scholars Portal in partnership with over a dozen OCUL libraries. The OLRC offers automatic replication of documents at five data centers across the province, providing member institutions with a secure, economical and geographically distributed storage option for digital preservation and backup.

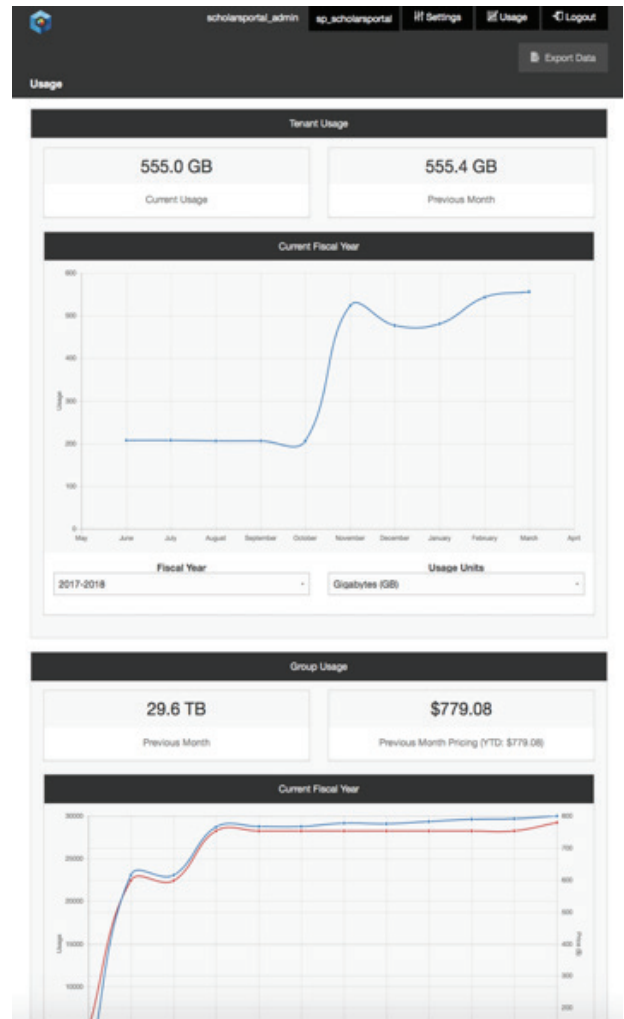
The OLRC started its first year of production service in May 2017, with subscription revenue now flowing in to OCUL to support and expand the service. As of May 2018,

the OLRC has 12 subscriber institutions and over 115TB of the 350TB of storage available on the platform has been subscribed.

Usage and cost monitoring tools were deployed in 2018 to allow subscribing libraries to view their usage, which is tracked monthly but billed annually. These tools are built into Swift Browser, a web-based interface developed by Scholars Portal that is designed to make interacting with the OLRC as simple as dragging and dropping files into a web browser.

For more information about the OLRC, including subscription costs, please visit the website at:

<https://cloud.scholarsportal.info>



New usage monitoring tool for the OLRC.

Project Canopus – Digital Asset Management at Scale

Project Canopus work has reached a significant milestone, with an initial implementation of the Digital Asset Management System (DAMS) now in place. After a couple of test implementations on different platforms, the decision was made to house the DAMS's data store on MarkLogic, the XML database used by all Scholars Portal services. Current development is focused on the creation and tuning of loader scripts that will allow the DAMS to ingest objects at scale. Currently, the development team is using test data from the University of Toronto (licensed e-resources), Lakehead (archival materials processed through Permafrost), and is working with Queen's to identify a test data set comprised of research data.

Updates

Ask a Librarian / Clavardez avec nos bibliothecaires

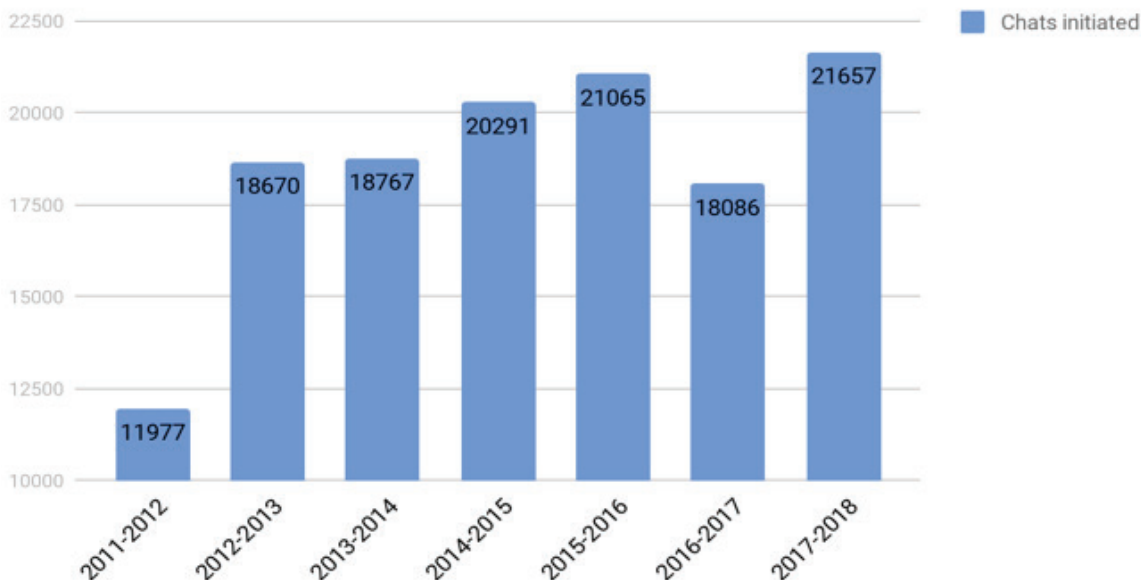
Ask a Librarian continued to expand this year, with the addition of two new partners, Carleton University and Algoma University. This brings the total number of participating OCUL institutions to fourteen. The new participants have allowed Scholars Portal to schedule additional operators during some of our busiest hours, providing for a better user experience for all participants of this opt-in service.

Usage of the service has also grown. During the 2017-2018 academic year, there was a 20% increase in the total number of chats submitted across both service languages, with the most significant growth occurring during the Fall 2017 semester. Contributing to this trend, usage of the French chat service increased by 21% during the academic year. The increase, however, needs to be seen in light of a drop in the use of the service in 2016-17, when we were struggling with the deficiencies of our older chat software.

Exit surveys indicate that users are satisfied with the service they receive:

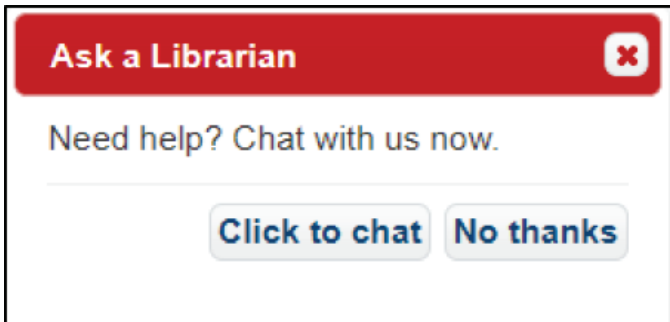
- 47% of users report Ask a Librarian is their preferred way of getting library help and an additional 46% describe the service as a good way to get help
- 74% of users rated the service provided by the librarian as excellent
- 97% of users would use the service again

Chat Volume on Ask/Clavardez by Academic Year



May I Help You? Proactive Chat Pilot with Lakehead University

In partnership with Lakehead University, Ask a Librarian launched a pilot of proactive chat in February 2018. Proactive chat is a feature of our chat platform that invites users to chat if they've remained on a webpage for a set period of time, presenting the user with a discreet pop-up window.



During the first two months of the pilot, we saw a 45% increase in chats submitted by Lakehead-affiliated users. Roughly 40% of chats over this period were submitted through proactive invitations rather than standard chat buttons. Scholars Portal is interested in helping other OCUL libraries implement this feature over the coming months as an initiative to engage more effectively with students.

Accessible Content EPortal (ACE)

As of April 2018, the ACE portal contained more than 14,500 titles in accessible formats available to OCUL and OCLS (Ontario College Library Services) users. This number is expected to grow to 15,000 by the end of 2018. These accessible titles have been created for ACE by the Internet Archive Canada, our digitization partner.

Work towards developing a staff portal started in Summer 2017. This portal will improve security and simplify the digitization request process for ACE coordinators at universities and colleges.

The relationship between ACE, OCUL and OCLS continues to grow, with several college representatives joining the ACE Working Group over the last year.

Marrakesh Treaty for Accessible Content Across Borders

The Marrakesh Treaty, which went into effect September 2016, seeks to improve access to alternate format books for people with print disabilities across international borders. An informal working group of OCUL directors has had preliminary conversations with universities in Australia. We are also watching developments in the United States with interest as these could open up opportunities for partnerships with American universities.

Open Journals System Hosting

In 2017, we worked with Ryerson University to migrate their PKP-hosted OJS instance to the Scholars Portal's OJS hosted service. Western University also became a client, bringing the total number of OCUL libraries using this opt-in service to 11 libraries.

To better support these growing numbers of OCUL clients, we created a new support mailing list and a space on the Spot-Docs WIKI to share news about updates, new features, and learning resources.

In early 2018, we began migrating our hosted instances of OJS to version 3 of the OJS software. This is being tackled on a library by library basis by our Digital Projects Librarian. OJS 3 includes an improved user interface, improved publisher workflows, a fully responsive (mobile-friendly) design, and enhanced theming options. We plan to have all OJS journals (over 120 now) migrated to OJS 3 by the end of Summer 2018.

Case Study: OJS 3 at the University of Ottawa

"The University of Ottawa Library recently made the switch to OJS 3 and would like to extend our thanks and a big shout out to the staff at Scholars Portal who did a great job managing the transition. We began with some initial testing in late November 2017, giving us time to learn the new interface before starting in January preparing with our journals to make the switch. Kaitlin was a huge help setting up test instances and giving us plenty of opportunity to solicit feedback from our journal managers and editors. Despite some initial apprehension on our end at the thought of such a big leap, the process went more smoothly than we could have hoped, in no small part due to the work of the SP team, but also the fact that OJS 3 is so much more intuitive to use than 2. Trouble shooting with users is much easier, and for the things that we can't quite answer, the SP team is quick to assist. It's also been a great opportunity to touch base with all our journals and do some outreach on increasing their discoverability."

--Jeanette Hatherill, University of Ottawa Library

What's New in OJS 3.0?

Discussions:

OJS 3 includes an internal discussion feature (similar to a forum) for each editorial stage.

Flexible Workflows:

Easily move a submission from one editorial stage to another without completing tasks on that stage.

Flexible Roles:

Easily change the names of roles, or create custom roles

Submission Files:

Submitters can easily add figures, supplementary data, and other files when they upload their manuscript.

Customizable interface & enhanced theming:

Separating out style sheets from templates makes the administrative interface more consistent, and theme editing easier.

Open Educational Resources

The OCUL sponsored Open Educational Resources White Paper was released widely in early 2018. The white paper includes an overview of the current teaching and learning environment across OCUL institutions, an environmental scan of national and international OER initiatives, a review of current technology and tools, and discussions of legal considerations and licensing, accessibility implications, and current and future opportunities for OCUL. Scholars Portal staff worked with an OCUL committee to prepare the white paper.

Open Textbook Toolkit

In summer 2017, eCampus Ontario funded the Open Textbook Toolkit project to develop a faculty OER toolkit in partnership with OCUL, University of Toronto, Brock University, and Western University. The resulting Open Textbook Toolkit is now available at <http://opentext.onlinelearning.utoronto.ca> and licensed openly for any institution to adopt and adapt.

Scholars GeoPortal

The Historical Topographic Map Digitization project was initiated by the OCUL Geo Community in 2014, with the goal of digitizing and georeferencing early-to-mid 20th century historical topographic maps produced as part of the National Topographic Survey (NTS). The data was made available on Scholars GeoPortal in May 2017. In addition to scholarly researchers working in the areas of historical GIS, the collection has value to practitioners in fields such as local history and genealogy and urban planning. Assisted by our promotional tagline, "Preserving Ontario's Past," this free collection was embraced by public libraries across the province. The project website has had more than 18,000 pageviews since the project launched.

The GeoPortal collection continues to grow. Land Information Ontario (LIO) is a large and valuable repository of geospatial information created by ministries, agencies, conservation authorities, and municipalities in Ontario. In the fall of 2017, we developed a process to regularly harvest metadata for open LIO collections and integrate them into the GeoPortal, providing users of the GeoPortal with a unified discovery experience for data we manage and for data held by third parties. New local municipal data collections were also acquired and released in 2017-18, including City of Mississauga (historic and current), City of Brantford, City of London, City of Toronto, and City of Guelph.

Our very first listing for Lidar data occurred in spring of 2018 with 2016/2017 Peterborough & Cochrane raw point cloud and classified point cloud data being added to the GeoPortal. Lidar stands for Light Detection and Ranging and is a kind of remote sensing that uses pulsed laser light to measure ranges (variable distances) to Earth in support of mapping. The use of lasers allows for mapping bare earth normally hidden

underneath vegetation. As research methods change, the GeoPortal will continue to need to accommodate new data formats.

Historical Maps

Building on the success of the historical topographic maps, the Laurier Military History Archive, Waterloo University, and McMaster University are partnering with the Scholars Portal to publish a number of important Second World War military maps. These previously classified maps, created in advance of the Allied invasion of Normandy in 1944, contain information about military defenses in France and beyond. The GeoPortal team is in the process of creating original sheet-level metadata for these maps and plans to release them as an Open Access resource in summer 2018.



Screenshot of Map of Holland, 1945 (1:25 000), Defence Overprint Map, designation "Secret"

ODESI

This spring we celebrated a decade of ODESI - the Ontario Data Documentation Extraction Service and Infrastructure. ODESI became a Scholars Portal service in March 4, 2008. Over the last year, the Scholars Portal data team has developed improved usage reports and added new collections to ODESI, including Health Canada data, newly recovered historical census data, and other historical collections. We have also brought on several new non-OCUL subscribers.

Opinion Polls: So, you're Canadian, eh?

In December 2017, Scholars Portal partnered with Queen's University and the Canadian Opinion Research Archive (CORA) to make CORA polling data freely available on ODE-SI. CORA data is available from the 1970s to the present and tracks Canadian opinions over time on important topics such as indigenous issues, healthcare, the environment, taxation, education, art and culture, satisfaction with government, and important problems facing Canadians.

CORA joins IPSOS (via Wilfrid Laurier University), Angus Reid (via Queen's University), Forum (via University of Toronto), Gallup (via Carleton University), and Léger (via University of Ottawa) as part of the large and growing collection of Canadian public polling datasets available on ODESI. In order to highlight this collection and its utility to the general public, a Public Opinion Polling Highlight Project, initiated in April 2018, will develop an online space to describe the collection and its importance for research about Canada.

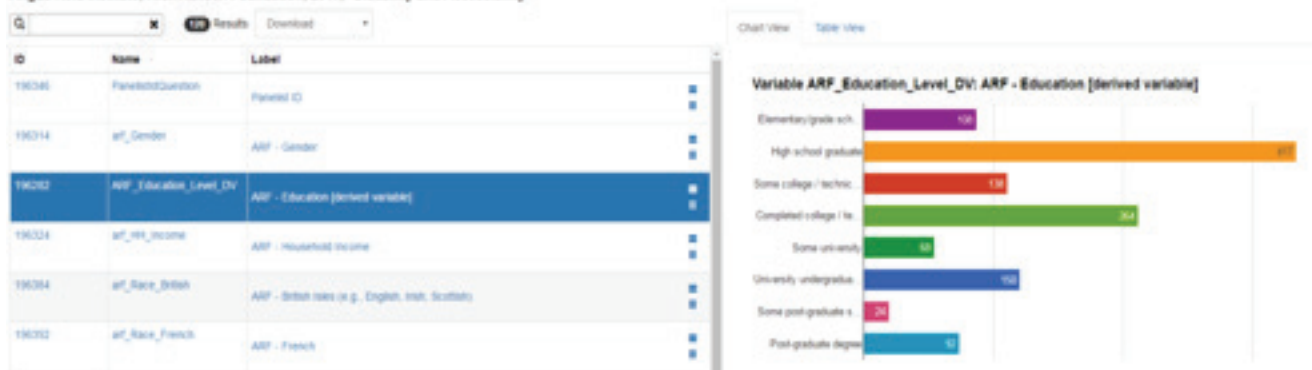


Dataverse

Scholars Portal staff completed an upgrade of Dataverse to version 4.8.6 in May 2018. Several new features come with the upgrade, including performance enhancements for datasets with large numbers of files, improved CSV ingest, and improved Google indexing, with Dataverse providing schema.org metadata to harvesters and indexers. A new institution-specific usage statistics report features online, interactive charts and a downloadable spreadsheet of usage data (updated monthly).

Disability and Accessibility, 2015

AccessibilityDisability2015-Public.tab
Angus Reid Institute: Rick Hansen Foundation, 2017, "Disability and Accessibility"



Screenshot of the Data Explorer Tool, developed by Scholars Portal and adopted by Dataverse installations around the world.

Data Explorer Tool

Offering Dataverse as an open source project, the Dataverse team at Harvard encourages contributions to the code-base from institutions that have adopted the software for local use. Scholars Portal developers contributed a new tool to Dataverse this year called the Data Explorer Tool (DET). The DET allows users to explore tabular data files in a visual way, allowing them to chart and cross tabulate variables within an easy to use browser interface. Included now as part of the core Dataverse code, the DET has been adopted by other community members, including Harvard University, DANS (Netherlands), and the Odum Institute Dataverse at UNC Chapel Hill. Expanding on the tabular file metadata available from Dataverse, Scholars Portal staff have been developing a Data Curation Tool (DCT). This tool supports the inclusion of DDI fields such as weights, groups and notes for variables, affording enriched data exploration and data literacy.

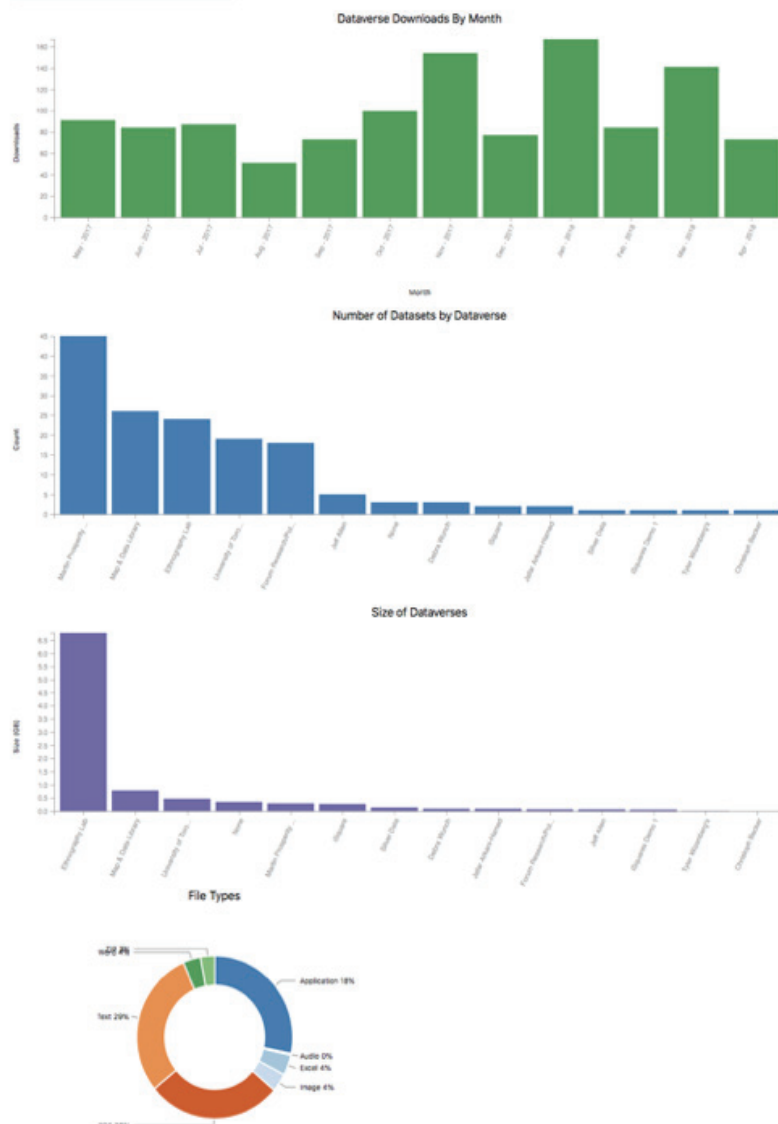
Sixteen OCUL members are currently using Dataverse at various levels to provide data repository services to researchers on their campuses. At some OCUL libraries, such as the University of Guelph Library and Queen's University Library, library staff are providing full data curation services to support researchers with deposit of research data in their institutional Dataverse.

Dataverse Report

May - 2017 to Apr - 2018

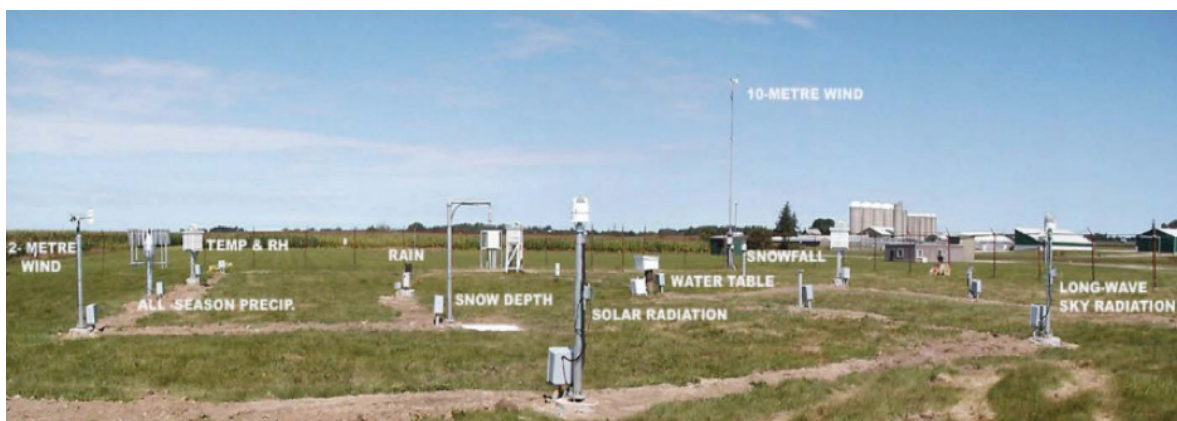
Download

University of Toronto Dataverse



Screenshot of new online usage report tool.

Dataverse Use Case: University of Guelph Agri-Environmental Research Data Repository

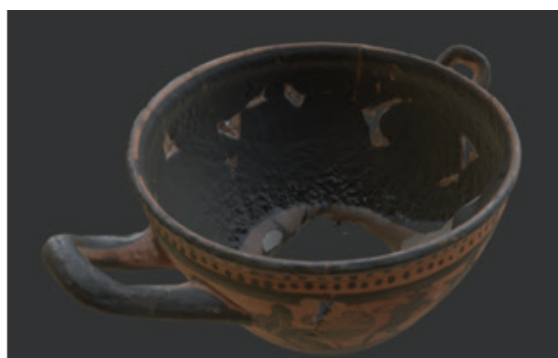


Photograph depicting the Elora Weather Station sensors from: Agricultural and Forest Meteorology Group. Elora Research Station/Guelph Turfgrass Institute., 2018, "Weather records for the Elora Research Station, Elora, Ontario [Canada]: Meteorological data 2018", <https://doi.org/10.5683/SP/RQRDSH>, Scholars Portal Dataverse, V1, UNF:6:UyRreK/raMxv6sDTKYMV+Q==;

The Guelph Agri-Environmental Research Data Repository was created in the Scholars Portal hosted version of Dataverse in 2012. With funding from the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA), the Agri-Environmental research group deposits data from agricultural and environmental research projects undertaken at the University of Guelph. To date, sixty-four datasets have been deposited by this group, covering a variety of topics, including soil, plant and species research data.

Dataverse Use Case: Queen's University Library Diniacopoulos Ceramics Display

The field of virtual reality is quickly growing across many disciplines, if none more important than the field of archaeology and cultural heritage. Numerous artifacts are uncovered each year by archaeological excavations around the world, and only a select few are displayed and recorded in museums while the rest remain hidden away in storage facilities. The use of virtual reality photography provides a potential solution to this problem. This project aims to optimize a computational workflow for digitally documenting these artifacts through an in-depth analysis of the Diniacopoulos Collection of Greek and Egyptian artifacts in collaboration with the Art History and Art Conservation department at Queen's University. The Diniacopoulos Collection of artifacts has been held by Queen's since their donation in 2001 by the estate of Olga Diniacopoulos. This project combines studio Photogrammetry with a method known as Focus Stacking to optimize the quality of each image.



3D rendered images of objects of the Diniacopoulos dataset from: Jones, Kristen; Bevan, George; Monette, Marissa, 2017, "The Diniacopoulos Ceramics Display, Department of Classics - 2016", <https://doi.org/10.5683/SP/T7ZJAF>, Scholars Portal Dataverse, V2, UNF:6:B4MvStefgmeu6++JjcdOQg==

Scholars Portal Staff at Queens University Library

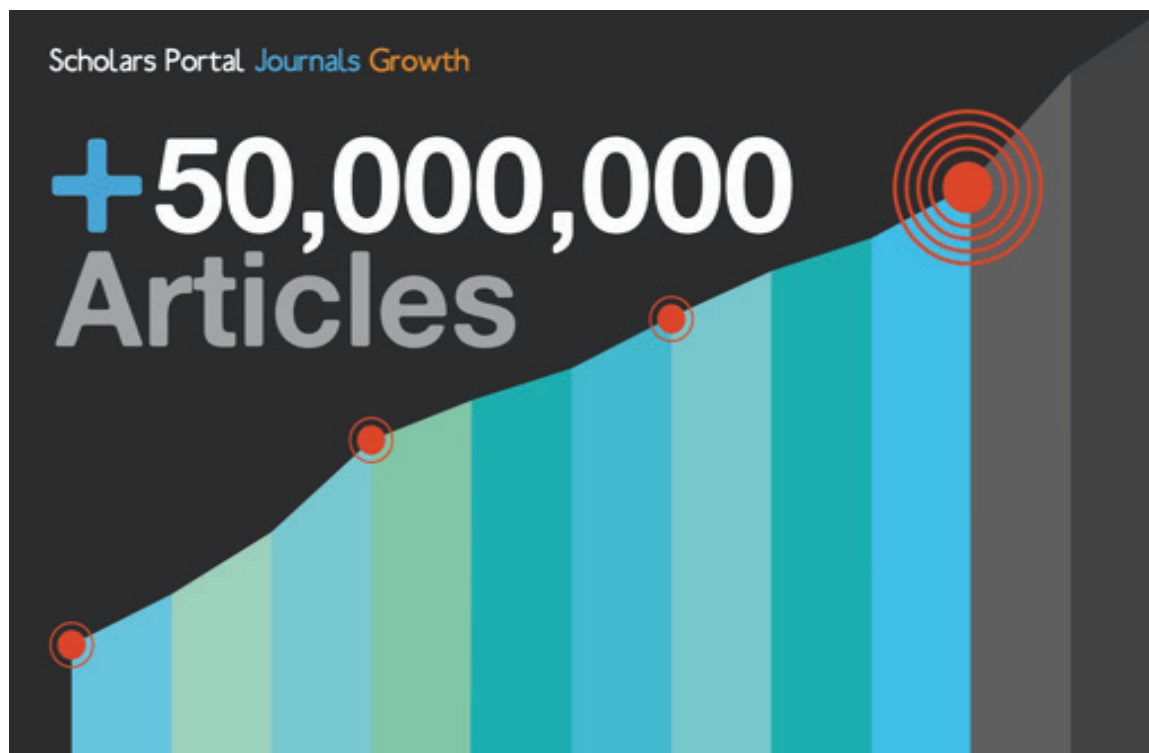
For fifteen years, Scholars Portal staff have been located exclusively at the University of Toronto Library. But distributed teams are a fact of life these days, and in 2017 Scholars Portal partnered with Queens University Library to hire a shared RDM Librarian to be located at Kingston. This shared position has allowed us to undertake new and interesting outreach activities for researchers and faculty members at Ontario universities. Since beginning the position in November, our Research Data Management Librarian, Meghan Goodchild, has been invited to speak at RDM and data-centric events at several universities in Eastern Ontario and is about to embark on a summer initiative to help researchers doing field work to use Dataverse and the Portage DMP Assistant to deposit and manage their data. We anticipate that this partnership will serve as a model for future positions in Scholars Portal.

Journals TDR

When the Journals platform launched as an OCUL service in 2002, it hosted a modest collection of just over 1 million articles from a few major publishers. Growth has been constant since then, reaching the 50 million article milestone in 2017, the year, happily, of OCUL's 50th anniversary. In May 2018, we surpassed the 52 million article count, adding over 2 million articles in one year.

This milestone was reached in part because of the dramatic increase in Open Access content on the platform. The total number of OA articles is close to 1.7 million. This includes large Open Access collections from PubMed Central and DeGruyter Open, as well as journals from Scholars Portal Open Journal Systems instances, the Ontario Ministry of Agriculture Food & Rural Affairs, and hybrid Open Access content from commercial publishers. Additionally, the archive of PsycCRITIQUES, a database of psychology related reviews maintained by the American Psychological Association, discontinued in December 2017, is now available on Scholars Portal Journals as a fully open access resource.

The Journals platform continues to maintain high standards for metadata and usage statistics. Using our CrossRef membership, we harvest metadata in order to enhance journal article metadata by adding DOI, ORCID, funding information, and citation lists when this information is not available from the publisher data. We also maintain a membership with Project COUNTER. Journals was recertified for COUNTER JR1 reporting in summer 2017, and we are currently preparing for the implementation of the next COUNTER release in January 2019.



Staying in Touch: Conferences and Social Media



In the past year, Scholars Portal participated in several showcases and exhibitions in order to explain our services to librarians, educators, and end users.

In May-June 2017, Scholars Portal rented a booth at the exhibition of the Congress of the Humanities and Social Sciences, a week-long superconference that attracted more than 10,000 scholars from across Canada and beyond. Scholars Portal staff distributed promotional materials and spoke with hundreds of social science and humanities researchers. Some conference attendees even directly approached the booth to let us know how frequently they use and how much they appreciate our longest-standing services, such as Journals and RACER. While only about half of the people we spoke with were from OCUL institutions, this was a great opportunity to promote our open collections and increase our name recognition outside of Ontario. We focused our promotional materials on our data services, the recent release of the Historical Topographic Maps, and the OLRC. The Topographic Maps project and the GeoPortal received the most interest, followed by Dataverse and ODESI.

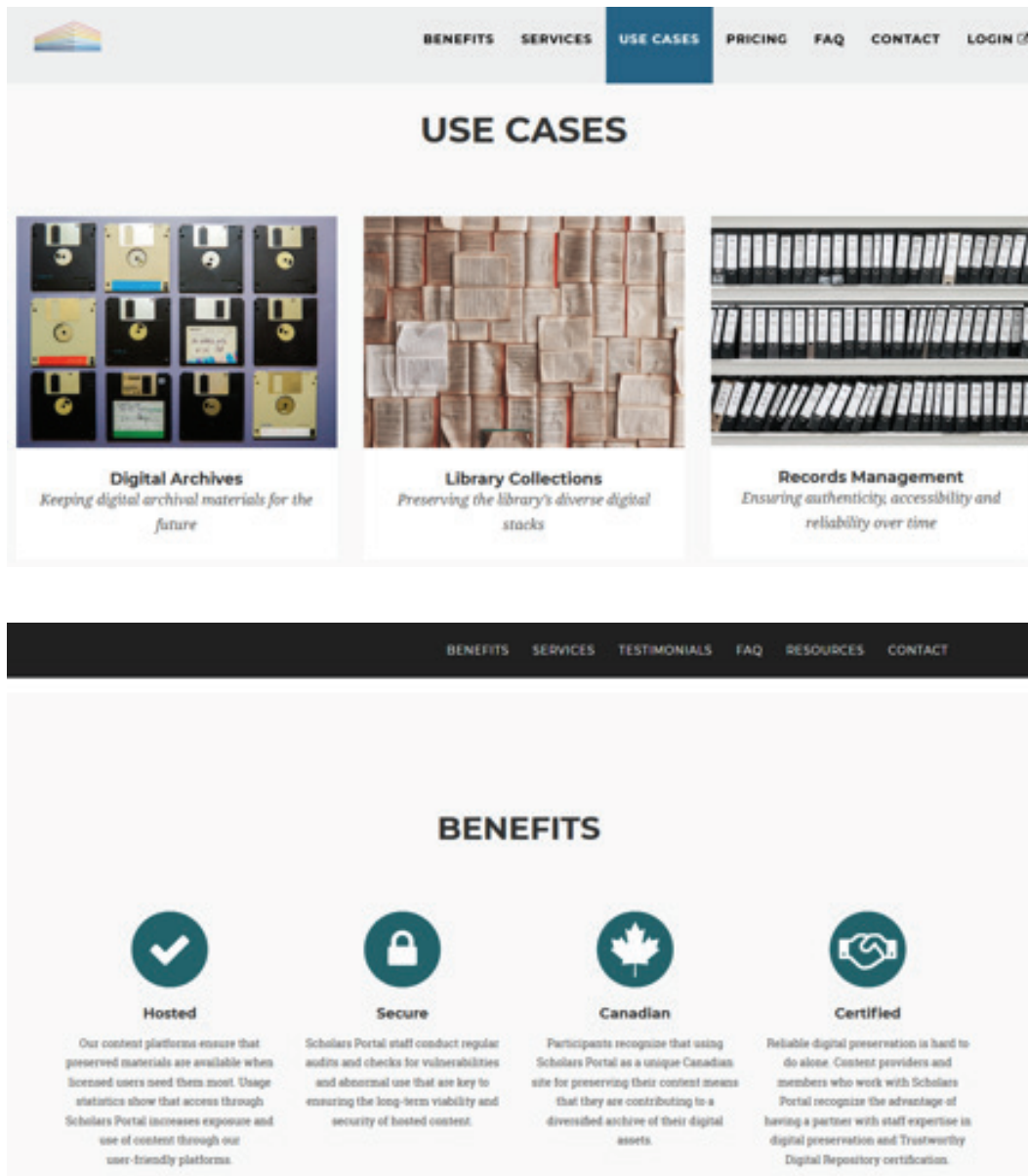
In November 2017, Scholars Portal rented a booth at eCampus Ontario's Technology Enabled Seminar and Showcase, where staff were able to connect with librarians, instructors, and online learning specialists at Ontario universities and colleges. While librarians were often familiar with Scholars Portal services, we were able to reach a new audience of instructors and online learning specialists, many of whom were interested in potential applications of using datasets from ODESI and the GeoPortal in their classes.

In January 2018, Scholars Portal and OCUL participated in the Community Partners Showcase, a half-day event at the Ontario Library Association Super Conference, where we were able to talk to librarians and library staff from a wide range of library types across Ontario, and particularly to promote our Topographic Map collection to public libraries.

As part of preparing for these outreach events, Scholars Portal staff prepared a new suite of promotional materials, particularly focusing on the data services and on the Historical Topographic Map collection. In addition to distributing these materials at these events, the raw files have been made available on the SpotDocs WIKI for member institutions to download, optionally add their own branding, and distribute within their own communities.

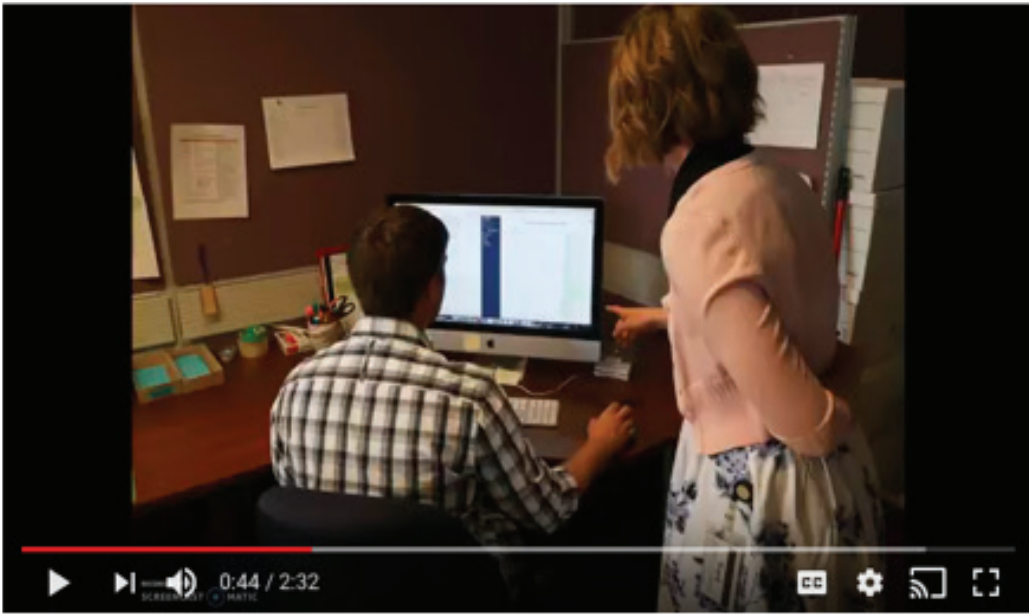
Updating Our Web Presence

Scholars Portal has also embarked on a project to improve our online presence and make information about our services easier to find for OCUL members and end users alike, beginning with the new OLRC webpage released in May 2017. Similar web pages are in development for other Scholars Portal services. Simultaneously, we have re-oriented our social media strategy to increase Twitter engagement and introduce more audiovisual material via YouTube.



Screenshots of the Permafrost and TDR websites in development.

One particular YouTube video, ACE Behind the Scenes, was produced in collaboration with the University of Toronto and released in January 2018. It was designed to highlight some of the processes involved in getting a print book into the ACE portal. This video is largely aimed at students or end users of the service, educating them about the process involved in providing materials in accessible formats.



Accessible Content ePortal Behind the Scenes

URL: <https://www.youtube.com/watch?v=QsURuUpnqTc>

Scholars Portal Day 2017

After a hiatus in 2016 for the Roadshow, Scholars Portal Day returned in December 2017 with the theme "Transforming Libraries." In addition to reflecting on work done so far during OCUL's first 50 years, Scholars Portal staff and library staff from across OCUL presented on current initiatives to transform collections, services, and spaces for a changing and diverse user population. Feedback from the 160 attendees (with another 40-50 watching the livestream) was very positive. Many said it was the best SP Day they had attended. Recordings from the event are available on the SpotDocs WIKI at <https://spotdocs.scholarsportal.info/display/SPD/Scholars+Portal+Day+2017>



Scholars Portal Day 2017 Q&A with Michael Ridley

URL: <https://www.youtube.com/watch?v=JjTuRIQAXX4>

Exploring New Roles & Partnerships

Many historical barriers to large-scale collaboration have disappeared in recent years, as technology makes it possible to collaborate with colleagues at long distances almost as easily as we collaborate with colleagues down the hall. Over the last year, Scholars Portal was invited to participate in two discussions about shared library services at a national scale, both described below.

CRKN Trusted Digital Repository Task Group

The goal of the Canadian Research Knowledge Network Trusted Digital Repository Task Group (CRKN TDRTG) is to develop a framework for the establishment of a national Trusted Digital Repository service for born digital content licensed by CRKN. The proposed TDR service has the potential to transform the landscape for the preservation of scholarly content in Canada by leveraging existing infrastructure, knowledge, and expertise for the benefit of CRKN members.

CRKN representatives from across Canada were nominated for membership in the Task Group, which also includes several Scholars Portal and OCUL staff and stakeholders from the University of Toronto Libraries. A final report with recommendations for the envisioned service will be considered for adoption by OCUL and CRKN in late 2018. The TDRTG report is the result of research, writing and consultation that has taken place over the winter and spring of 2017-2018. Scholars Portal staff members attended meetings of CAUL and COPPUL directors in February and March and of the Québec consortium BCI in May.

Dataverse North Working Group

Bringing together Dataverse providers and library users across Canada, the Portage - Dataverse North Working Group (DVNorth) aims to build a community of practice in Canada to discuss the development of coordinated training and support services for Dataverse, as well as shared national infrastructure to support Canadian researchers.

DVNorth sub-groups have developed reports including recommendations related to library and researcher training, metadata best practices, and Dataverse hosting.

On the Horizon for 2018

Dataverse-Archivematica Integration

Scholars Portal has recently contracted with Artefactual Systems to update Archivematica to add functionality for ingesting datasets from Dataverse and saving these as Archival Information Packages (AIPs) into the OLRC. This will allow Scholars Portal to connect Dataverse with Permafrost, which is based on Archivematica, and add preservation capabilities to the suite of RDM services that we can offer OCUL libraries. The project will continue over Summer 2018 and the code will be released in a future updated of Archivematica.

Dataverse Internationalization Project with Université de Montréal (BCI)

OCUL and Université de Montréal, on behalf of BCI (Bureau de coopération interuniversitaire), the academic library consortium for Québec, have formed a partnership to create a French-language interface for Dataverse. The version of Dataverse currently used by Scholars Portal has an incomplete French-language translation based on customizations to the code made by Scholars Portal staff. The Project with BCI will be part of a larger project to internationalize the Dataverse code base to support multiple languages. Université de Montréal is contributing funds to cover the work of a programmer at Scholars Portal and will also provide translation support and testing.

Semantic Data Projects

In late 2017, Scholars Portal purchased a semantics license from our XML database vendor, Mark Logic. Mark Logic Semantics allows us to natively store, query, and manage triples, which are the basic data structure of the linked data model. All of our metadata and much of our full-text content is stored as XML in Mark Logic. With the new semantic features, we will be able to represent relationships between entities in individual XML documents, across documents, and across collections. Scholars Portal staff actively participate in the activities of Canadian Linked Data Initiative (CLDI), Linked data for Production (LD4P) and other linked data communities.

We will be piloting a number of semantic applications over the course of 2018-19. We plan, for instance, to link book reviews on the Journals platform with reviewed titles on the Books platform using triples. We are also working on modeling Journals entitlements and collections metadata as linked data, using published ontologies. The

Journals entitlements and collections metadata will be converted into RDF and loaded in the MarkLogic triple store. The linked data model will allow the combination of text searching with semantic searching of entitlements in MarkLogic to enforce access rights in Scholars Portal Journals. It will make entitlements easier to manage and allow tracking of entitlement change histories. Additionally, the linked data model will make it possible to integrate external scholarly resources with our locally held content. We plan to publish entitlements and collections metadata as linked data so that OCUL member libraries can integrate this information with their local library system for better e-resource management.

Data Center and Cloud Strategies

The University of Toronto Library recently commissioned an external review of its data center facilities at Robarts Library, the same data center that Scholars Portal uses to host its servers. The report from the consultant made a number of recommendations, including advocating greater use of cloud-based computing services such as Amazon and Azure to provide higher levels of redundancy and scalability. Scholars Portal staff will be working with UTL Information and Technology Services to develop new data management and data center strategies in response to the external review over the course of 2018-19.

Space Renovations

The University of Toronto Library has begun a long-term renovation program for the 7th floor of Robarts Library, space that Scholars portal shares with a number of other departments at UTL. The goal of the renovation is to provide more effective use of existing space by redesigning it to accommodate the working practices of technology-oriented teams.

Archive-IT and Grey Literature Project

In Summer 2017, in partnership with the Council of Prairie and Pacific University Libraries (COPPUL), OCUL announced a multi-consortial licensing deal to offer Archive-It subscriptions at a reduced cost. Archive-It, a web archiving service provided by the Internet Archive, allows subscribers to harvest, manage, and preserve collections of web content. As part of the OCUL-COPPUL deal, Scholars Portal has acquired an Archive-It license, and has begun testing the tool for a number of purposes, including harvesting of government documents and grey literature. We will also be working with COPPUL to look at preservation options for web archiving.