20/21

Scholars Portal
Report to the OCUL Directors

Scholars Portal 2020 - 2021 Report to the OCUL Directors

INTRODUCTION

The following report describes the activities of Scholars Portal over the period of May 2020 to April 2021.

The 2020-21 academic year was characterized by disruption as well as resilience. Scholars Portal staff had already expected to spend this year handling technological changes due to aging pieces of our infrastructure, planned developments and enhancements, and the move of so many OCUL institutions to a new library system in Alma. However, we ended up grappling with much more: the challenges of remote work, operational changes at all our member institutions, and rapidly shifting considerations and priorities.

We were forced to be nimble and agile, rearranging workflows and modifying longstanding configurations in order to support our users and our community. Some of our services had to pivot to accommodate the realities of remote work, research, teaching, and learning. Through it all, we are pleased to say that we continued to deliver high-quality services on our reliable, remote infrastructure, and to make planned enhancements and upgrades.

SP 20-21 by the numbers

Overall service uptime: 99.999%

Collective hours on Zoom: 21,400+

New JIRA tickets: 2086

This year, in the shift to online work, we heard from a number of OCUL schools that the inability to access networked drives and office computers meant that Scholars Portal services were heavily relied upon for supporting staff, students, and researchers with access to OCUL's digital resources and data. Thanks to the Systems team and the reliable server infrastructure they develop and maintain, all Scholars Portal services remained up and running during the pandemic with no unplanned outages.

Comparison of Pageviews for SP Services
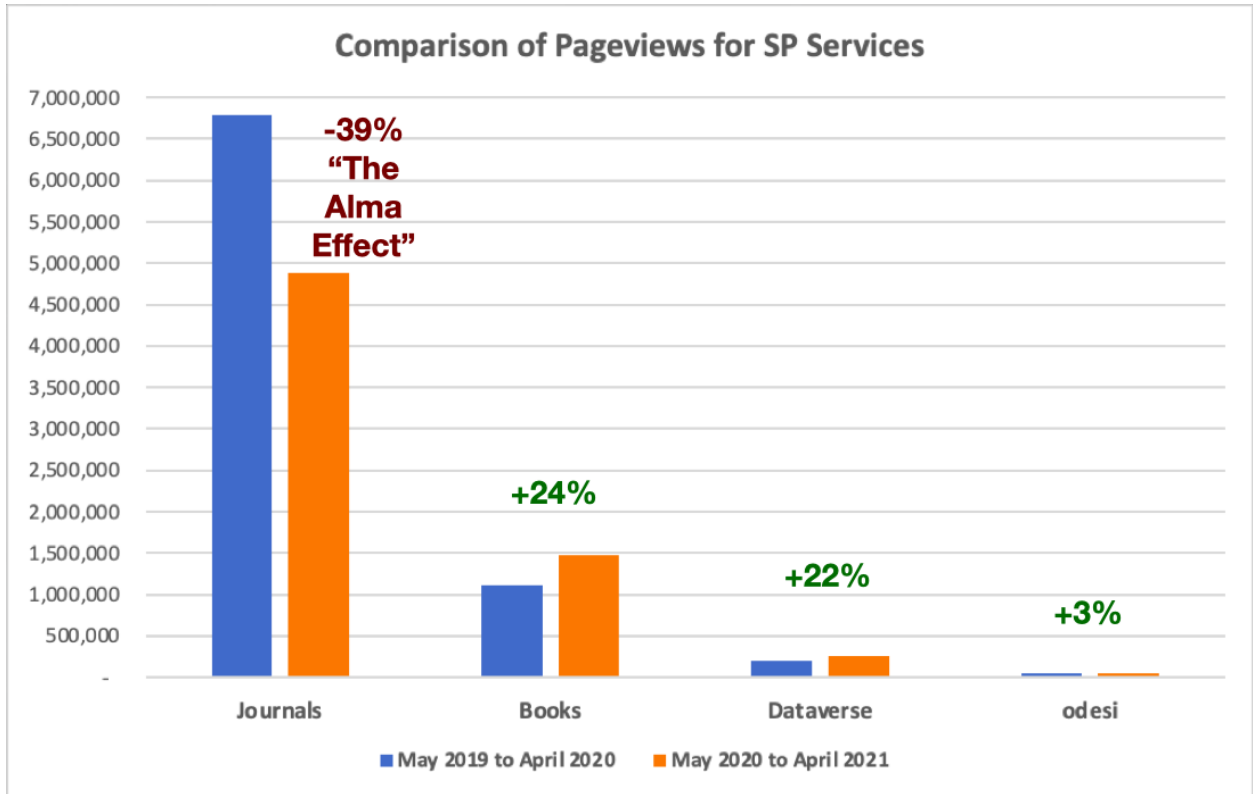
As an organization providing online, networked resources for a geographically distributed consortium, Scholars Portal's work was already remote most of the time. During the pandemic we carried on with the usual work for most services. The biggest changes to 'business as usual' came to our front-facing user services. Some changes came about through operational necessity; others were made to support remote success. Meanwhile, many developments continued as previously planned.

HIGHLIGHTS FROM 2019-2020

While Scholars Portal did not file an annual report in spring 2020 due to pandemic circumstances, the period of May 2019-April 2020 saw some key updates to our services.

The Accessible Content ePortal (ACE) saw an important service upgrade in September 2019 with the launch of the much-anticipated staff portal. The new ACE staff portal allows accessibility staff at OCUL institutions to submit, edit, and track their requests. This portal was developed in-house at Scholars Portal to replace our previous spreadsheet-based tracking system, streamlining workflows for the ACE team and reducing our reliance on external commercial service providers.

In November 2019, along with the upgrade to Dataverse 4.17, the Scholars Portal Dataverse team launched the Data Curation Tool (DCT). Funded as part of the CANARIE grant we received for RDM development, the DCT allows data owners and curators to create and edit variable-level metadata for any tabular file in a dataset. As another deliverable for the CANARIE project, we integrated Dataverse with Shibboleth for single sign-on.

In January 2020, after two successful pilots, Scholars Portal expanded our virtual reference service offerings with an optional texting add-on for Ask a Librarian. Each participating library has a phone number that users can text questions to, while operators use the same interface for responding to these texts as they do for chat. Five institutions are currently participating.

And finally, in 2019-2020 Scholars Portal said farewell to our locally hosted SFX instance. We had run the OpenURL resolver since 2003 to facilitate access to Scholars Portal Journals and other sources of full-text articles. As OCUL institutions moved away from SFX and towards Alma or 360 for their link resolving needs, the shared SFX instance no longer made sense. After 17 years of faithful service and hundreds of millions of links resolved, we ramped down SFX over winter 2020 and finally decommissioned the server in May. This change also means that we are working closely with Ex Libris to make sure our holdings are reflected in Alma, 360, and the vendor-hosted version of SFX.

GOING WITH THE FLOW

Since Scholars Portal provides online, networked resources for a geographically distributed consortium, our work was already remote most of the time. During the pandemic we carried on more-or-less 'business as usual' for many services. This section covers that continued to run reliably and improve steadily through times of disruption.

Scholars Portal Journals

New content

The Journals team continued to load new content to Scholars Portal Journals throughout 2020-2021. There was a short delay for the publishers to deliver the data during the beginning of the pandemic, but they caught up rapidly. In total, 5,387,841 articles were added in SP Journals during 2020, and at the beginning of 2021, the total number of articles loaded on Journals passed 60 million!

New features

Unpaywall linking

Journals now provides linking to Open Access articles via Unpaywall (https://unpaywall.org/) using the Unpaywall API. Unpaywall is a database of open access scholarly articles harvested from indices, repositories, and individual journal sites around the world. The green Unpaywall button will appear on any SP Journals article details page when the user does not have access to that article, but an Open Access version is available through the Unpaywall service.

University of Toronto Law Journal / 67(4)

INTERNATIONAL LABOUR RIGHTS: LEGITIMIZING THE INTERNATIONAL LEGAL ORDER?

Ruth Dukes

October 2017, 67(4), p.544 - 568 - University of Toronto Law Journal

This article considers the role of international labour rights in an era of globalization. It begins from Patrick Macklem's definition of that role in terms of providing the international legal order with a measure of normative legitimacy. It then interrogates the relationship between sovereignty and international labour rights in an era of globalization, highlighting the particular significance, in this context, of the voluntary surrender by nation states of elements of their sovereignty. It questions whether Macklem has given due consideration to this phenomenon and to its consequences for the rights and interests of workers and whether, therefore, he has succeeded in providing an account of international labour rights that is at once descriptive and normative, as he intends it to be. Having drawn attention to the limitations of international labour rights, the article concludes by commenting briefly on the desirability of a body of transnational labour law, of which international labour law would form only one part.

international labour law | transnational labour law | European Social Model

Read the whole article here

https://journals.scholarsportal.info/details/00420220/v67i0004/544_ilrltilo.xml

Focus on Canadian Scholarship

The Journals team is working on a Linked Data project to highlight Canadian Scholars on the Journals platform. We are using data from the Global Research Identifier Database (GRID), an open database of educational and research organizations worldwide, as well as ORCID iDs, persistent digital identifiers for individual researchers.

While loading the article details page on the Journals platform, a program will check the GRID and ORCID data to see whether any of the authors are affiliated with Canada. If the article has a Canadian author, a "Focus on Canadian Scholarship" icon will be added, which then links out to the "Canadian institution list" generated from the ORCID database. Users can then browse by region, institution of employment, education and funding organization. This project is currently in the testing phase but we hope to release it to production in 2021-2022.

Journals content indexed on Google

In addition to exporting Journals holding data to various knowledgebases, the Journals team is also making Journals content available for Google crawling and indexing in order to allow this content to appear in Google searches and improve the discoverability. About 115,000 articles have been indexed in Google so far.

Browse

Employment Organization
University of Alberta
University of British Columbia
Simon Fraser University
University of Toronto
Lakehead University
University of Ontario Institute of Technology
University of Ottawa
Adler University
ArtEZ University of the Arts
Bhabha Atomic Research Centre, Department of Atomic Energy, Government of India

Education Organization
University of Toronto
University of Alberta
University of British Columbia
McGill University
Simon Fraser University
University of Waterloo
Dalhousie University
Queen's University
Université de Montréal
University of Manitoba

Funding Organization
Natural Sciences and Engineering Research Council of Canada
Canadian Institutes of Health Research
Swiss National Science Foundation
Adelson Foundation
Alberta College of Occupational Therapists
American Heart Association
Austrian Science Fund
Brain and Behavior Research Foundation
Bundesministerium für Bildung und Forschung
Burke Foundation

Region
ON
BC
QC
AB
Ontario
CA
PA
British Columbia
London
NS

Start Year
2010s
2000s
1990s
1980s
1970s

Showing 1 to 20 of 136 Results « ‹ › »

All Canadian Authors

Janine Hostettler Schärer
https://orcid.org/0000-0002-2765-1000
Document Link

Yoichiro Kanno
https://orcid.org/0000-0001-8452-5100
Document Link

Carol Cook
https://orcid.org/0000-0002-5193-5100
Document Link

Fay Guarraci
https://orcid.org/0000-0002-2091-5000
Document Link

Amr Ibrahim
https://orcid.org/0000-0003-2090-2100
Document Link

Xiunan Wang
https://orcid.org/0000-0003-4070-4101
Document Link

Andrew McPherson
https://orcid.org/0000-0002-5654-5101
Document Link

Paul Siakaluk
https://orcid.org/0000-0001-6466-7101
Document Link

Daniel O'Neil
https://orcid.org/0000-0002-9978-0101
Document Link

Reem sabano
https://orcid.org/0000-0001-6386-9000
Document Link

April James
https://orcid.org/0000-0002-1741-5101
Document Link

Linda Yu
https://orcid.org/0000-0002-4658-9100
Document Link

Fan Yang
https://orcid.org/0000-0002-0254-9000
Document Link

I Ketut Wardana
https://orcid.org/0000-0001-6150-5000
Document Link

Ria De Gorter
https://orcid.org/0000-0002-8360-7101
Document Link

Focus on Canadian scholarship data browser

Getting content into Alma

All 152 Scholars Portal Journals collections are now live in Ex Libris's Alma and SFX knowledgebases. Our holdings data is updated weekly. A list of collections to be activated in Alma was sent to each school at the end of 2020 according to their subscription. Working with Ex Libris, we have identified and fixed article level linking and several other issues.

Usage Statistics

Between the delay in collections going live in Alma, the switch to broad off-campus access, and the transition to the latest version of the COUNTER standard, 2020-21 was a complicated year for usage data. Scholars Portal Journals successfully passed an independent audit for compliance with COUNTER Release 5 in spring 2021. Subscribers to Jisc's Journal Usage Statistics Portal (JUSP) can already find Scholars Portal COUNTER 4 data in their accounts, and we hope to be able to provide COUNTER 5 data to JUSP and Unsub soon.

ODESI

ODESI provides a large and comprehensive collection (5000 +) of Canadian survey and polling data available for use in research and teaching. Access to this repository has been particularly important this past year, with the closures of on-campus Research Data Centres and the need for timely access to data on the economic and social impacts of the pandemic like the monthly Labour Force Surveys and Statistics Canada's Impacts of COVID-19 on Canadians survey series, which were added to ODESI as soon as they became available. ODESI downloads were 22% higher at OCUL institutions in 2020 over 2019.

ODESI's search site is a popular data search tool used by staff and researchers at over 40 institutions across Canada (with one new subscriber in 2020). This year, the following improvements were made to the search site:

- New accessible features, such as improved colour contrasting for enhanced access;
- Improved default search behaviour to weight titles higher;
- New permalink feature for linking and sharing datasets;
- Improvements made to the monthly usage reports for schools.

ODESI uses Nesstar (http://www.nesstar.com/) as the back-end metadata and data repository, providing metadata in the Data Documentation Initiative (DDI) standard to support detailed and variable-level information for searching and discovery. Nesstar (a software product developed by the Norweigan Social Science Data Archive) is approaching end-of-life status. The ODESI team has confirmed that the product is no longer being developed or maintained, but is still being licensed for use. We estimate Nesstar will need to be replaced by 2023 due to underlying operating system dependency deprecation and overall performance challenges that have been noted over the years. Scholars Portal staff have begun to work with SPOD to develop a strategy for replacement of Nesstar.

Permafrost

2020-21 was a year of growth for the Permafrost service as our members continued to use the service to expand their digital preservation knowledge, process more collections for

preservation, and enable access to digital collections online. Service members processed 1.3 TB of archival packages from May 2020 to April 2021 for a total of over 2 TB of data in storage. The year showed an increase in data storage by 180%.

With almost all of our users working from home, the early stages of the pandemic meant ensuring they could continue using Permafrost. In April 2020 we published *Bringing Digital Preservation Home: Using Permafrost Remotely* on the Scholars Portal *Guides* site. The guide profiled the work of Lakehead University Archives, who started documenting the regional response to the pandemic from the start (and continues to do so) and is preserving these irreplaceable materials with Permafrost.

New faces

Jenna Lemay joined us on secondment from Algoma University as the Permafrost Preservation Assistant in June 2020. One day per week, Jenna has provided the service with valuable help through documentation writing and maintenance, tool testing, and user support, including a soon-to-be published guide on metadata in Archivematica that will benefit the global Archivematica community as a whole.

Western University joined us as our newest subscriber in June 2020 and completed a successful internal pilot for preserving digitized photograph collections and geospatial data in December 2020.

Technical evolutions

With the support of the Scholars Portal Systems Team, we undertook two upgrades to Archivematica, one of the service's core components, to version 1.11 (September 2020) and 1.12 (April 2021).

A successful proof-of-concept integration with the Canopus digital asset management system at the University of Toronto was completed in January 2021 to enable improved reporting and cross-collection management.

We have encouraged institutions to leverage the power of Archivematica and the OLRC for access purposes. Hundreds of images and audiovisual materials have been processed for access by Archivematica and linked to the OLRC through locally-hosted AtoM instances at the University of Waterloo and the University of Ottawa. New potential integrations are also on the horizon, with testing using Globus and DuraCloud underway.

Publishing Services

OJS 3.3 upgrade and growth

In winter 2021 we began the process of upgrading our subscribing members to Open Journal Systems (OJS) version 3.3, which introduces a lot of exciting usability improvements both on the journal-facing side and in the editorial backend. Since much of the editorial workflow and user management has been reconfigured, we felt this was a good time to put some of our new automated server side deployment mechanisms to work and set up development environments for our subscribers to use for testing and training.

Part of our move to automating our deployment involves consolidating individual OJS code bases that each member had into one. In the past each library had its own version of OJS because of various local customizations that had been made over the years, but all of those customizations have now been moved into standalone plugins allowing us to move everyone to the same code base. As a result, we have shed a significant amount of technical debt and are in a good position to grow the service even more. In January of this year we migrated two of Carleton's OJS instances to our servers and we hope to begin offering the service to university libraries beyond Ontario. We currently have 12 OCUL libraries that use the service with about 170 journals altogether and over 45,000 published articles.

Editorial workflow in OJS 3.3

Preservation

Over 120 open access OJS journals from across Canada are using the Scholars Portal Journals TDR for active archiving, which is a best practice recommendation for inclusion in The Directory of Open Access Journals (DOAJ). Last year we implemented a mechanism that first checks to see if the original article file is available on a journal's site before offering the archived copy for download. The hope is that this drives more traffic to the journals and keeps usage data all in one place. We have also begun work on serving our indexed OJS content through an OAI-PMH interface to other service providers.

New participants

OJS: Carleton, Nipissing

Crossref membership: Ontario Tech

THINKING ON OUR FEET

The abrupt switch to remote work in spring 2020 brought both challenges and opportunities for Scholars Portal. In this section, we focus on services that were adjusted during the pandemic to respond to operational limitations and changing needs--while, of course, still responding to existing developments in technology, policy, and partnerships.

Accessible Content ePortal (ACE)

Due to its heavy integration with physical infrastructure, ACE was one of the Scholars Portal services most impacted by pandemic-related closures. 2020-21 was a year of pivoting for ACE, as the team adopted new operational strategies and introduced service enhancements to counterbalance limitations around access to print collections and the temporary suspension of digitization services at Internet Archive Canada.

Working with the community to expand the collection

On June 1, 2020, a new policy came into effect removing the previous print ownership requirement. Previously, in order to access a resource in the ACE collection, an institution would have to hold a print copy in their physical collections. Under the new policy, all OCUL schools have equal access to the over 23,000 titles in the ACE collection as long as one school owns a print copy. This policy had been under development for some time, but it was approved just in time to expand access to collections when it was most needed.

Spring 2020 also saw the development of the Community Submission Form, which allows Service Coordinators at OCUL libraries to submit titles digitized locally, along with appropriate metadata, directly to ACE. This workflow has been very successful, resulting in 5,602 submissions (mainly from Toronto, Carleton, Guelph and McMaster) as of March 2021. This collection growth was approximately five times our normal digitization volume for this time period, and provided a less costly alternative to print scanning; if this collection had been scanned via Internet Archive Canada it would have had an average price tag of $44 per book for a total of $246,488.

Increased support

While experimenting with new workflows has been unavoidable, this experience has been beneficial insofar as helping the service to develop a number of alternative models for processing digitization requests in a virtual environment in collaboration with Internet Archive Canada and the University of Toronto Libraries' Access Services.

Due to workflow changes, ACE staff provided increased customer services support, including offering training, developing documentation materials, holding more frequent meetings of the ACE Working Group, and introducing more granular tracking for digitization requests. Each individual digitization request involved a greater degree of intervention than in normal times as well: an average of 18 emails per book.

In December 2020, an ACE in Context Survey was distributed to members of the ACE Working Group to develop a better understanding of institutional needs and context in which the service is offered. Responses were overall positive regarding service offerings with recommendations around expanding supports outside of accessibility specific work. Service familiarity was ranked strongly as was support and usefulness for training provided.

Ask a Librarian

Increased volume, extended hours

Ask a Librarian was very busy in 2020-2021 as nearly all courses across OCUL moved online and the virtual reference service was the main access point for users to contact their library. The opening week in September 2020 was the busiest week in the service's history!

To handle the increased volume, some schools began to double-staff the service, with two operators working during that school's scheduled shift. Western Libraries also decided to move their circulation help service to Ask, and Carleton is planning to do the same.

In consultation with Directors and local Ask coordinators, Scholars Portal expanded Ask hours this past year to include extended summer hours and a longer schedule including remaining open through the spring and summer intersessional periods. In the Winter 2021 semester we also extended service by opening one hour earlier, starting at 9 AM instead of 10 AM.

Total Chats Answered per month: 2019 vs 2020 vs 2021
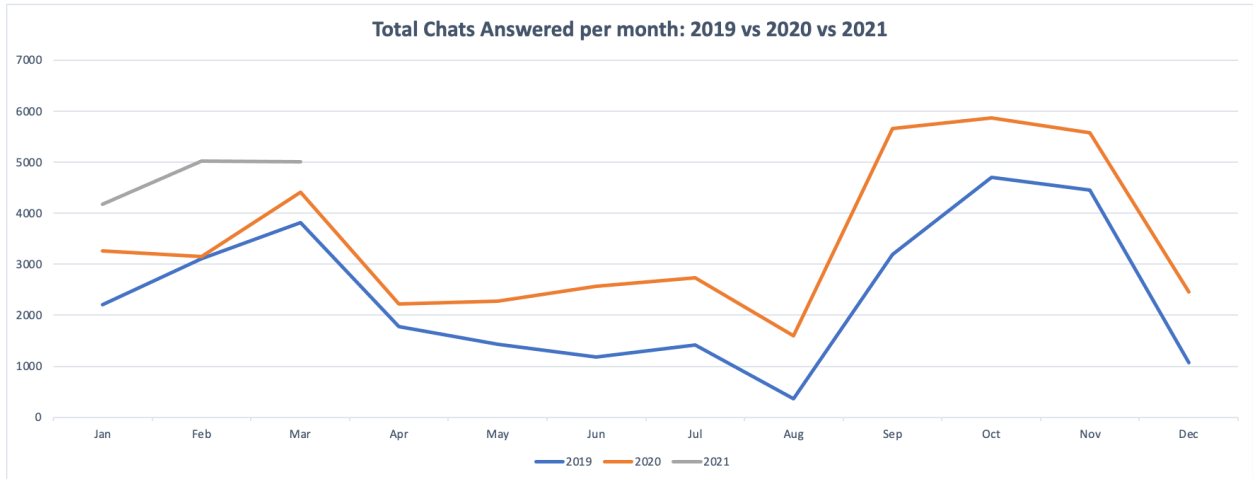
We offered five operator training sessions between April 2020-March 2021, a higher number than usual, to accommodate new staff who had been asked to fill shifts in response to the high volume of chats.

Comments from users:

"This is a fantastic service. With the campus and libraries closed, I am so glad the librarians are available to chat with us online and help us out. Thank you!!"

"This service is such an excellent feature during the uncertain times of COVID 19. The librarian was extremely helpful and pleasant. They were very understanding of the circumstances and offered the perfect solution. I am very thankful for this opportunity to chat with the librarian during this time of closure."

"Thanks so much to all of you, who are working in odd times and under very difficult circumstances. I really appreciated your help today!"

Quality service

To help provide up-to-date information on the many adjustments required by lockdown of certain areas in Ontario at various times, we set up a FAQ page on Spotdocs where chat operators can quickly find information pertaining to Ask participants, such as library hours, equipment loans, bookable study spaces, and curbside pickup information. Local coordinators edit this page when service changes occur to ensure that the information stays current.

In order to provide a standard high-quality chat reference across the consortium, and also to identify potential areas for future training, the Virtual Reference Steering Committee has formed an informal Transcript Review Working Group composed of local Ask coordinators. This group will regularly review a randomized anonymized sample of chats for quality assurance purposes.

Scholars GeoPortal

Approaching 10 years since its launch in 2012, the Scholars GeoPortal plays an important role in delivering high-quality geospatial data to researchers and connecting academic Map and GIS libraries across Ontario. This year, Scholars Portal, together with members from the OCUL Geo Community and Scholars Portal Operations and Development (SPOD), embarked on a renewal project that will seek additional one-time funding from OCUL for infrastructure updates. Phase 1 of the project has been drafted and is currently being considered by the OCUL Executive. This upcoming year will see members of the working group and SPOD continue to investigate infrastructure options and make recommendations about the future GeoPortal based on OCUL's needs.

Large data transfer

During the early months of the pandemic, it became increasingly clear that continued access to digital library data services was required for students and researchers. The GeoPortal was no exception, and in response to what would typically have been a lengthy request for large amounts of data delivered via harddrive or USB, the GeoPortal team decided to experiment and offer Globus (https://www.globus.org/) as a file transfer mechanism for large data delivery.

Prior to the use of Globus at SP, often an FTP setup or hard drive delivery was used to transfer large files. With Globus, a requesting school can receive terabytes of data in a fraction of the time it would take using FTP or by sending hard drives in the mail. In addition, we were able to set up the Globus connection and stage the data being requested for researchers directly, without the need to have an intermediary storage setup at the local institution/library.

The use of Globus for GIS data delivery across OCUL libraries has been extremely helpful in reducing the amount of time it takes to receive data from suppliers, and in providing large amounts of data to researchers on request. This year we delivered large swaths of data to over 15 individual projects using Globus. This is in addition to the collection that is available for regular download via the Portal, which had over 196,000 metadata views and 36,000 downloads this year.

New data for 2020-2021:

New imagery products including SCOOP 2018 (South Central Ontario), Lidar elevation data, and partial coverage for DRAPE 2019 (Eastern Ontario)

COVID 19 boundaries
City of London 2019
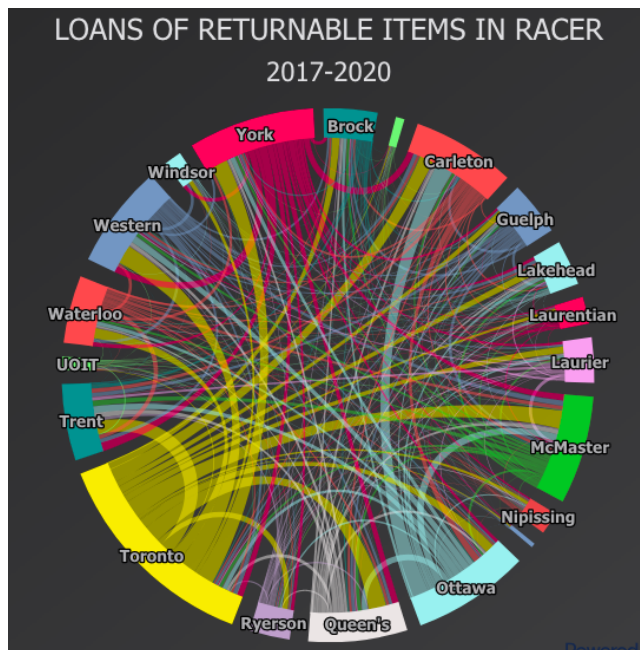**City of Mississauga 2019 and 2020**
City of Kingston (new participating municipality)

RACER

Omni/Collaborative Futures

In late 2019, the Collaborative Futures project launched Omni, a shared instance of Alma and Primo for a number of OCUL institutions. As of Spring 2021, 16 of OCUL's 21 members are on Omni. The RACER team supported this migration by updating each institution's catalogue configurations in RACER, as well as investigating, developing, and testing methods for communication between RACER and Alma. Most notably, with the help of York and the TUG schools, we have developed a process to forward user resource sharing requests from Alma to RACER using ISO protocols.

Omni partners are planning to launch an Automated Fulfillment Network (AFN) in June, which will manage requests of physical, returnable materials among participating institutions. Since loans between two Omni participants represent around half of requests for physical items within OCUL, the AFN launch will result in a significant reduction in RACER traffic.

All OCUL: https://api.everviz.com/share/vpZESqYjw
CF participants: https://api.everviz.com/share/1rd0E9tO5

Electronic and Physical Lending During COVID

Because of the physical nature of interlibrary loan, RACER is one of the Scholars Portal services most impacted by the COVID-19 pandemic. The RACER team has been able to customize the settings and configuration in the software, to allow each institution greater flexibility in terms of their local resource sharing approach. For example, some locations stopped resource sharing entirely for a period of time, while others allowed for electronic resource sharing only, and still others allowed requests for scans of print materials. When institutions began to restart physical resource sharing, we also customized user alert messages, modified pickup locations to provide options for curbside pickup, and changed mediation settings to control the volume of requests.

Consortial Partners

The four Canadian regional academic library consortia renewed their resource sharing agreement at the end of 2019. This new agreement standardized no charges for resource sharing requests and a six-week loan period for returnables among participating institutions, which includes all OCUL institutions except for the University of Toronto. RACER settings were updated in early 2020 for the new default six-week loan period and the removal of charges among participants.

Several of our consortial resource sharing partners have recently migrated to new systems, in part because of the forthcoming sunsetting of the VDX software (on which RACER also runs) in 2024. The national union catalogue, formerly Amicus, and the Quebec universities' BCI shared catalogue, formerly Columbo, have moved onto WorldShare Management Services (WMS) as Voilà and Sofia. WMS uses a different technology for catalogue searching than other interlibrary loan systems, so setting up these targets for discovery and requesting within RACER has involved an investment in configuration, testing, and troubleshooting by the RACER team.

The Ontario public libraries have also sunset their consortial VDX instance, INFO, which has been removed from RACER search. Individual public libraries must now be added to RACER for borrowing and lending requests.

Scholars Portal Books

Getting content into Alma

SP has worked closely with Ex Libris to make sure our ebook content is reflected in Alma, and most of our collections were available to activate by June 2020. Currently, around 600 collections on Scholars Portal Books are available for activation in Alma, and that number continues to grow as we add new content and load new annual collections. This process is not without issues, and we continue to be grateful to the Alma institutions that report problems and work with us to help troubleshoot them.

Books TDR

A pilot to bring ebooks into the Scholars Portal Trustworthy Digital Repository is nearly complete. The Association of Canadian University Presses collection was selected as our first group of books to process, and via a design and development project scheduled to wrap up in April 2021, team members completed a workflow for the safe preservation of this valuable collection. The project will continue to investigate additional collections over the coming year with the goal of processing all books eligible for preservation thereafter.

Emergency Temporary Access to print collections

The pandemic has brought with it a significant increase in usage and reliance on the Books platform. One of the key projects of the year was the design and implementation of an Emergency Temporary Access (ETAS) model, which facilitated the opening up the existing ACE collection for non-ACE users. This has entailed converting over 20,000 books in the ACE collection into viewable page images, developing a mechanism that will display the option to view the book if a library has chosen to open its ACE collection to all of their users and working with staff at libraries to ensure titles within the collection do not circulate.

Currently in use by Western and Queen's, the ETAS component of the Books platform also allows access to digitized copies of print materials that students would not be able to access otherwise. The system allows for usage terms to be applied at the title level in order to reflect the number of copies a library owns and is able to make available for concurrent use. Some of the element of this project include:

- Creating an ingestion workflow for library staff to submit scanned content and metadata, and then notifying them when the content is loaded.
- Developing a method for handling title specific usage terms that supplement the collection level terms to include the number of concurrent users allowed, as well as an expiry date for when the book will no longer be available online.
- Customizing the reader interface to present a library specific terms of use agreement that a person needs to accept before a book opens.
- Making the books in the ETAS collection unsearchable in the main index so that they can only be accessed through a direct link.

"This arrangement has worked fabulously for students and faculty, and while I recognize that it's labour-intensive on both our sides, I think the final product is seamless and usable (given the necessary limitations). I appreciate being able to offer this option to faculty when other means of access fall through, and they acknowledge the efforts we take to support their courses without costs to students."

Crystal Mills,
User Services Manager
Western Libraries, Western University

KEEPING AN EYE ON THE PRIZE

Even during unprecedented times, the cycle of innovation continues! This section focuses on services that are in the midst of major developments and enhancements.

Ontario Library Research Cloud (OLRC)

Moving to "OLRC 2.0"

In May 2021 the Ontario Library Research Cloud (OLRC) entered its fourth year as a production service. The OLRC is made up of 13 subscribing libraries, with nearly 250 TB of data stored and replicated across 5 partner storage nodes: Queen's University, University of Guelph, University of Ottawa, University of Toronto, and York University.

Beginning in April 2020, the OLRC team began the process of updating the hardware and software that power the OLRC. This involved acquiring new hardware storage, deploying this new storage cluster in coordination with partner storage nodes, configuring the OpenStack Swift software, testing the performance of the new cluster, updating user documentation, and migrating data to the new cluster. This upgrade will enable the continued replication and preservation of the nearly 1 billion objects* stored in the OLRC and will bring a number of performance enhancements and new features. Throughout 2021, the OLRC team will work with subscribers to migrate to the new cluster, as well as enhancing the applications used to connect with the OLRC.

* 980 million including SP objects; 10 million subscriber-deposited objects

Duracloud integration project

In October 2018, Scholars Portal, UTL, and COPPUL received CANARIE funding for the project "DuraCloud Canada: Linking Data Repositories to Preservation Storage". The aim of this project was to connect regional preservation storage networks, including the OLRC and COPPUL's WestVault, through a preservation management layer (Duracloud). Throughout 2019 and 2020, the project team worked to deploy the Duracloud software, remove its dependencies on Amazon Web Services (AWS), and connect the tool to the OpenStack Swift storage used by the

OLRC. This project has now been completed, and Duracloud will be available to use for OLRC subscribers once they migrate to the new OLRC cluster.
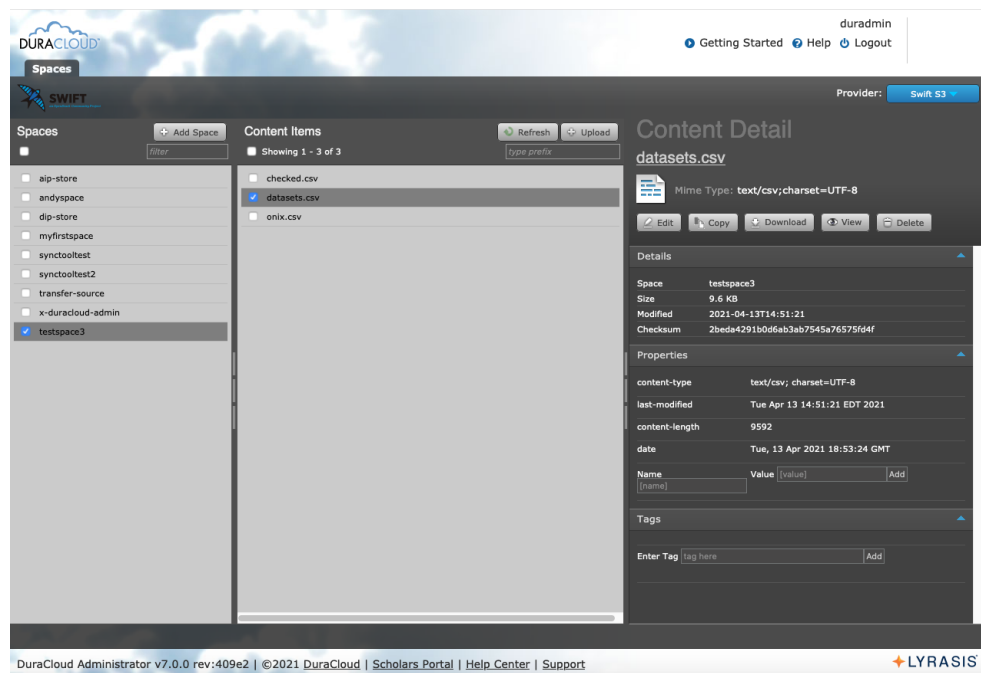
The Duracloud interface

Dataverse

In the fall of 2020, Dataverse (https://dataverse.scholarsportal.info) officially became a national service, with the four Canadian academic regional library consortia agreeing to co-sponsor the Scholars Portal/University of Toronto Libraries (UTL) service. Scholars Portal and UTL acknowledge OCUL as a pioneering partner and the role it has played in supporting Dataverse's growth and transition into a national repository option in Canada.

Building national connections with Portage/NDRIO and FRDR has meant that Dataverse is well positioned to be recognized as a trusted repository that is supported by academic libraries and RDM professionals across Canada. In the fall of 2020, Scholars Portal, UTL, and Portage announced the successful procurement of over 300TB of storage for deposits that led to an increase in the base storage for each subscribing institution (tiered to size). This support for storage is in addition to the ongoing support provided by Portage/NDRIO for the base Dataverse budget that goes to subsidize the overall cost of the service for institutions. This funding support has been instrumental in onboarding many institutions from outside of OCUL, including new schools from COPPUL and CAUL this year (total 59 schools now subscribed).
As part of this national service, a new governance board is being set up that will help to oversee the Dataverse service. A separate update report is planned for institutional members and the governing board in 2021.

COMMUNITY CONNECTIONS

The Scholars Portal team is leveraging both technology and our personal connections to stay in touch with each other, with the OCUL community, and with end users, while maintaining physical distance.

Focus on user experience and accessibility

Over the past year a lot of effort has been put into fine-tuning the Journals platform in order to improve the user experience of people using assistive technologies to interact with the interface. In addition to following best practices that ensure WCAG AA requirements are met, our work has focused on making it easier to navigate pages so that tasks can be done faster.

Every section of a page is now contained by landmark elements and the content of every landmark is broken up and structured using heading tags. This greatly reduces the number of keystrokes a person using a screen reader would need to use to skim through a list of results because they can now navigate by heading numbers. For example, on a results page, article titles are always at heading level 3 and corresponding author, source and snippet information can be accessed at heading level 4. In practical terms this means that an entire results list can be scanned using two keys without forcing the user to listen to information they might not want. Also, content that was once defined by the visual cues of the layout is now labeled for screen readers so that a person knows a list of names are the authors without needing to infer that after hearing them.

Other accessibility features that were added are contextual help aides that describe an unfamiliar page or landmark in order to create a mental model. This way a person using a screen reader can know the semantic structure of the content and how to navigate it, rather than having to waste time learning it through trial and error. And finally, we added a contact form for reporting accessibility problems so that there is a clear avenue for people to get assistance if they need it.

Our next step is to assess the usability of the Journals Platform with voice control software and then apply all of the same features enhancements to our other platforms, specifically Books and

the ACE repository. The end goal is to provide a consistent experience between platforms so that Scholars Portal becomes the first choice for people that have usability needs.

Zooming around the province

As a consortial service with stakeholders across Ontario and indeed across Canada, Scholars Portal has been making use of teleconferencing and videoconferencing technologies since its earliest days. In late 2020, the Client Services Team worked to archive old recordings from the Scholars Portal Adobe Connect server, which had been running since 2007, as part of our move to the more accessible and user-friendly Zoom for webinars and virtual events. As the members of our committees, working groups, and OCUL communities grew more comfortable with videoconferencing technology in 2020, Scholars Portal was also able to move away from our legacy teleconference line and hold most meetings over Zoom.
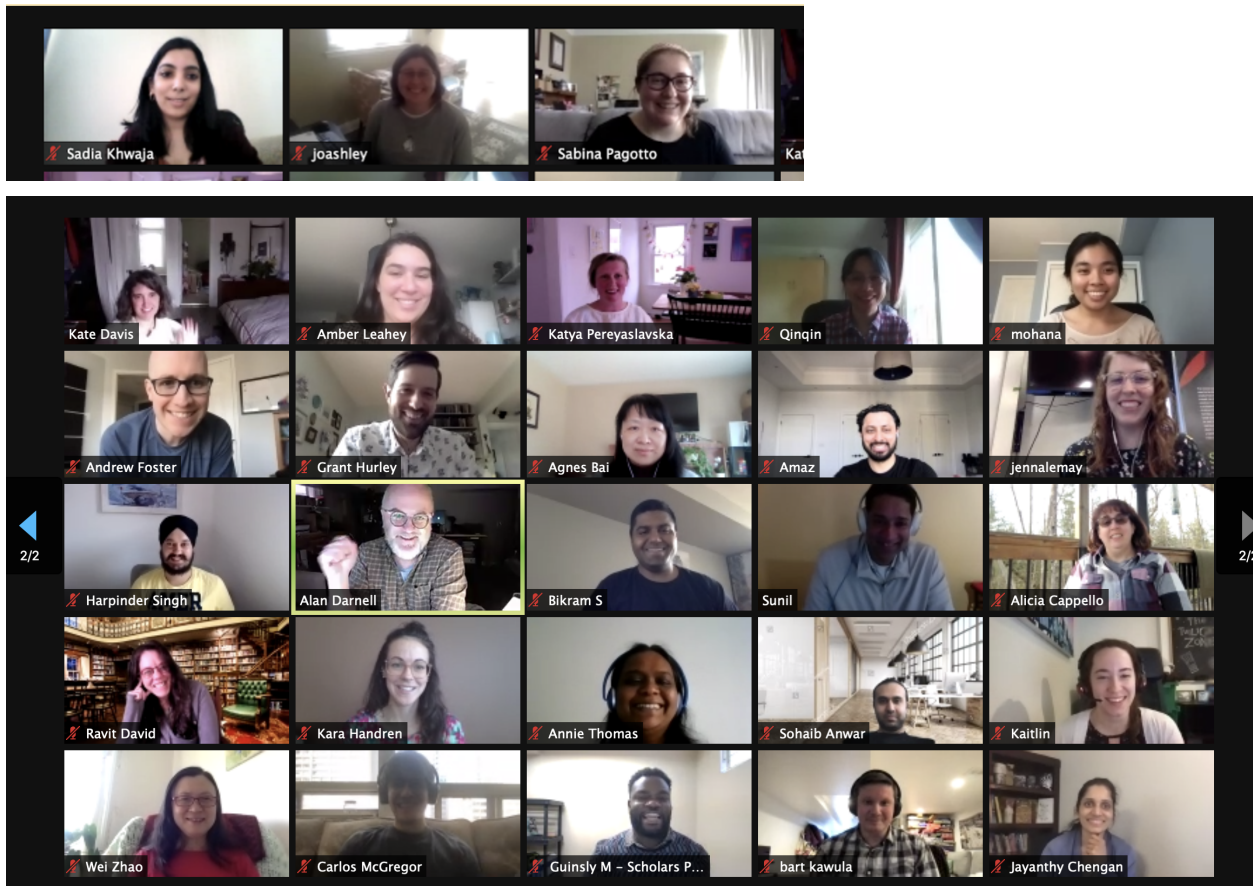
Scholars Portal Roadshow 2020

Traditionally, Scholars Portal hosts Scholars Portal Day, an annual communication and networking event for OCUL member libraries, every December in Toronto. In 2016-17, Scholars Portal tried a new experiment by holding a Scholars Portal Roadshow. Based on feedback from this Roadshow, Scholars Portal staff planned another Roadshow for winter and spring 2020, instead of holding a Scholars Portal Day in December 2019 amidst Alma migrations.

The tour kicked off in Toronto and the Greater Toronto Area in February 2020, with plans to travel to libraries in Southwestern Ontario in March, Eastern Ontario in April, and Northern Ontario in May. Due to COVID-19, all the events originally scheduled for March and later were rescheduled as virtual events between April and June.

While the pandemic meant that Scholars Portal staff were unable to travel to visit as many member libraries in-person as planned, hosting virtual events focused on the needs and interests of one or two institutions at a time allowed Scholars Portal staff to virtually "meet" more people and answer questions, discuss priorities, and learn about local situations at a more granular level than we can accomplish at a traditional Scholars Portal Day. The final Roadshow consisted of six in-person and nine online events, for a total of 15 events with over 350 librarians and library staff members.

Overall, feedback for the Roadshow was positive, particularly for the online events. Moving forward, we plan to continue to hold Roadshows every three to five years, and may consider a hybrid in-person/virtual model.

Communicating COVID Content

Preprints and open data have both seen a huge surge this year with the rise of COVID-19 research.

As of April 2021, over 85,000 articles related to COVID-19 or SARS-CoV-2 have been loaded to the Scholars Portal Journals platform (http://bit.ly/SPJCOVID19), many of which are available Open Access. To facilitate ease of access to these articles, we developed a Twitter bot that tweets a link to newly added articles on the Journals platform each morning. More information about this bot is available on our user guide.

The data from Statistics Canada's survey series, Impacts of COVID-19 on Canadians, has been added to ODESI as it becomes available, and 30 COVID-related datasets have been published publicly to Dataverse.

Communication en français

Scholars Portal continues to strive to serve all users at OCUL member libraries. In 2020, we launched a [French version of our website](#) and published [two](#) [articles](#) in Open Shelf magazine our journey towards providing bilingual service support.

LOOKING FORWARD

Team Comings and Goings

Since our last annual report, Scholars Portal has welcomed some new team members:

- Alicia Cappello, Dataverse Preservation & Policy Coordinator - January 2021
- Jenna Lemay, Permafrost Preservation Assistant - June 2020
- Mohana Sarmiento, Programmer/Analyst, Systems & Cloud Services Team - August 2019

We have sadly said goodbye to several colleagues who moved on to other adventures:

- Dawas Zahdi, Systems Support Specialist, Systems & Cloud Services Team - January 2020
- Andrew Hong, Application Programmer, Data & GIS Team and Systems & Cloud Services Team - July 2020
- Sunil Manikonda, Application Programmer, Books Team and Data & GIS Team - May 2021
- Alan Darnell, Director of Scholars Portal Services - July 2021

Improving Support

Our Web Services team has made great strides in improving several of the SP platforms' accessibility, and we plan to continue this work in the coming year, starting with Books. We are also looking at training opportunities for the entire team to build on the basic knowledge imparted by the mandatory University AODA training.
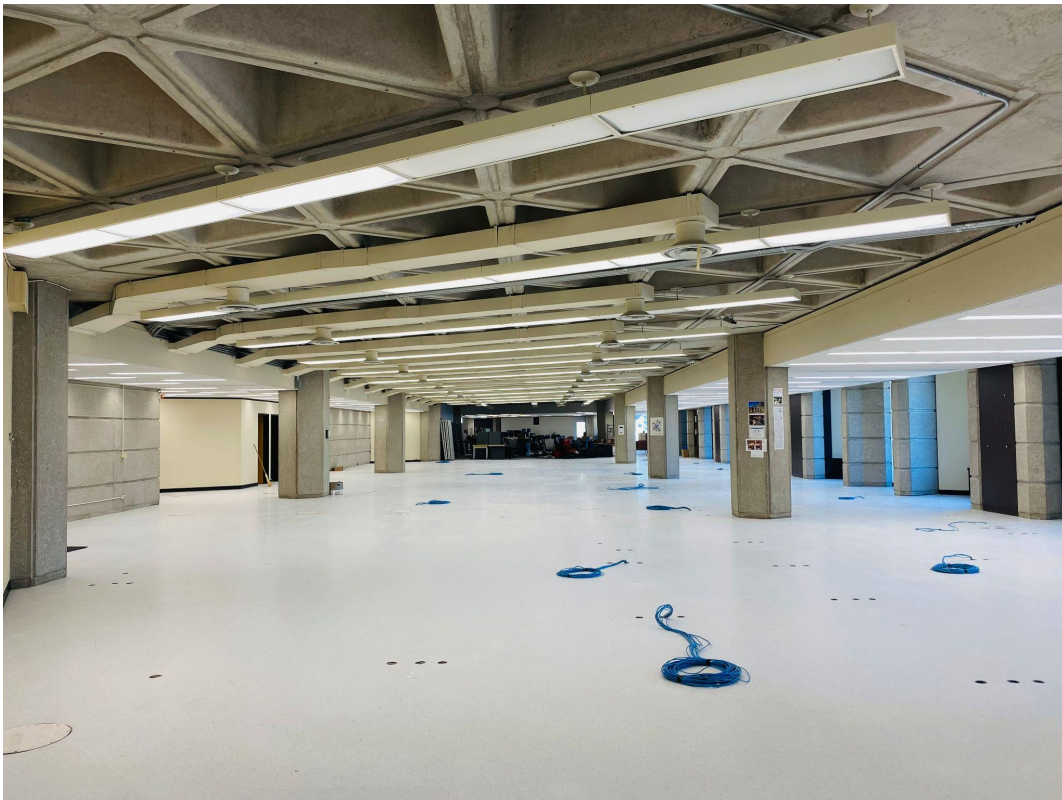
With the success of the Roadshows in reaching library staff across OCUL, we are working with the OCUL-SP committee to develop new communications strategies for increasing awareness of SP services. Currently a sub-group of the committee together with a few SP staff are working on a template, schedule, and distribution plan for a newsletter that will provide updates and highlight usage at member libraries.

Refreshing our Services

To ensure that we can continue to provide the high level of service experienced by users this past year, we are looking ahead to a few necessary platform upgrades. For the GeoPortal, we will be upgrading the ESRI software and migrating to version 10.8.1 to allow for continuation of core functionality while the longer-term development path is determined. Similarly, the locally-hosted VDX and ZPortal software which are the backend of RACER, require database and server upgrades for security and maintenance purposes. This upgrade is planned for the summer, so that we can continue to provide a consortial solution for resource sharing while discussions about the broader future of this service occur.

The Nesstar software used for odesi is nearing end of life and requires a replacement. Preliminary explorations have focused on the feasibility of using Dataverse for this purpose, and in 2021-22 in consultation with SPOD and the OCUL Data Community we will move ahead with a migration.

Looking further in the future, we anticipate that more progress will occur this year towards the goal of providing Journals as a Trusted Digital Repository for CRKN. We will also start working with COUNTER to develop certified usage reports for the Books platform.

Photo of the new 7th floor space.