Scholars Portal
Report to the OCUL Directors

2021/2022

Scholars Portal 2022
Report to the OCUL Directors

INTRODUCTION

The following report describes the activities of Scholars Portal over the period of May 2021 to April 2022

Scholars Portal can be described in many different ways, but above all, it is a shared library technology infrastructure. When we talk about infrastructure, we tend to imagine something big and stable, something tangible and enduring, like a bridge or a highway. But these images imply something unmovable, inflexible. The fact of the matter is that technology is always changing, and so are the needs and the goals of libraries and their users. Scholars Portal, too, adapts to meet the moment. A river itself doesn't move, but the water in that river is constantly in motion. And sometimes, the river isn't quite deep enough naturally for our needs, so we need to lend it some assistance and dig out a canal and occasionally, build a lock station or two along the way to facilitate the course of the water.

The past year, Scholars Portal has worked closely with all levels of OCUL to deepen collaboration. In particular, SPOD has emerged as a venue where ideas that flow up from the OCUL Communities and other ground-level / front-line groups can be shaped into a vision we can act on, allowing us to move forward on some long-percolating ideas. This continued collaboration, with OCUL Communities, with SPOD, and with OCUL-SP, has laid the groundwork for successful next steps on a number of projects, including the Shared Repository Infrastructure Working Group, the GeoPortal Refresh, and the Future of Collections & Resource Sharing Working Group.

What follows is a report on Scholars Portal's work during the 2021-2022 year. We have chosen to frame our efforts using water metaphors: the rushing rapids of new and exciting services, the continually flowing streams of robustly-sustained core services, the turning tides of services in need of a major overhaul or a sunsetting, and of course the bridges of partnership, which connect and support all of the work done at Scholars Portal. Looking ahead, we will need to continue to work together to push these important projects forward.

REPORT FROM SPOD

In late 2019, OCUL re-established the [Scholars Portal Operations and Development committee](#) (SPOD) to oversee and guide Scholars Portal program and service development for the OCUL membership. SPOD works with Scholars Portal to establish priorities, make recommendations, and identify opportunities related to the services that Scholars Portal develops and sustains for OCUL. SPOD provides input and direction on the nature, structure, and scope, as well as on staffing, funding, sustainability, and assessment. The SPOD Committee meets monthly, and it communicates regularly with OCUL Directors about key issues and opportunities relevant to Scholars Portal's work.

Scholars Portal develops and sustains many OCUL services. During 2021-22, SPOD worked closely with Scholars Portal on a number of activities, including: developed ToR for a Shared Repository Infrastructure Working Group; advised on the OLRC storage pricing framework for non-OCUL subscribers; engage in discussion and provide ongoing advice in the review and re-development of the GeoPortal and the ODESI services; discuss and make recommendations on OCUL engagement with PKP.

SPOD membership (2021-22):

- Beth Namachchivaya (University of Waterloo) - Committee Chair
- Rebecca Graham (University of Guelph) - Director-at-large
- Talia Chung (University of Ottawa) - Director-at-large
- Kate Davis - Interim Director of Scholars Portal
- Amy Greenberg - Interim Associate Director of Scholars Portal

Ex officio:

- Sian Meikle (University of Toronto) - Associate Chief Librarian for Digital Strategies and Technology
- Ed Driedger (Nipissing University) - OCUL-SP Committee Co-Chair
- Karen Pillon (University of Windsor) - OCUL-SP Committee Co-Chair
- Michael Vandenburg - OCUL Interim Executive Director

NAVIGATING THE CURRENTS OF CHANGE

The Scholars Portal Journals platform first launched as an OCUL service in 2002. In the intervening two decades, the ecosystems of collections, scholarly publishing, library technology, and consortial collaboration have all evolved significantly. The currents of change have brought us to where we are today, and they are pulling us ever forward.

The last few years have seen all of us navigating choppy waters, frequently moved by forces outside our control. Some Scholars Portals services are navigating into new and uncharted waters; others are making regular updates in order to maintain their usefulness and relevance; while still others are seeing the currents pass them by.
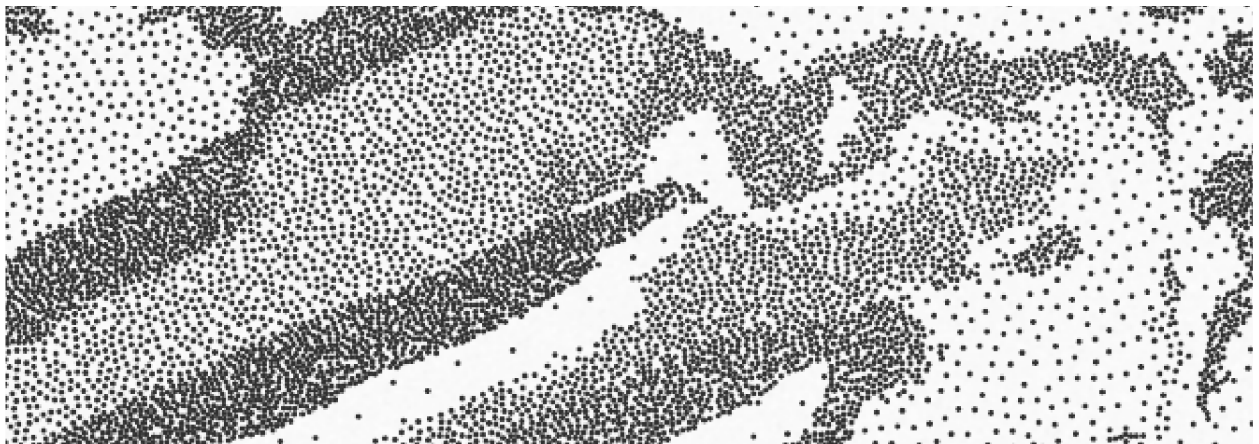
WHITEWATER RAPIDS

Like the swirling currents of a fast-moving river, some of our services saw exciting new developments in 2021-22, and have more expected in the years ahead.

Ontario Library Research Cloud (OLRC)

Preservation & Cloud Services

The OLRC is entering its fifth year as a production service. In 2021, the service expanded to welcome subscribers outside of OCUL, including Concordia University and St. Francis Xavier University. At the same time, pricing was lowered for all subscribers, making storage in the OLRC even more cost-effective. The OLRC now has 15 subscribers across Canada, with over 50 million objects uploaded and 130 TBs of data in use.

Throughout 2021, the team continued to work with subscribers to migrate their data to the new "OLRC 2.0" cluster. The cluster leverages new hardware and software for improved performance and security, and brings several new features to the service, including a new web dashboard (Horizon), and the ability to connect more applications to OLRC's object storage system through S3 emulation. S3 emulation has also enabled us to move the Dataverse service to use OLRC for data storage, and has enabled the use of DuraCloud.

What's DuraCloud?

As a hosted application that sits on top of the OLRC, DuraCloud enables more effective preservation storage management for uploaded files, including the ability to create and sync independent copies in additional storage locations, perform regular independent fixity checks, and automatically upload files from local storage locations. DuraCloud is ideal for managing preservation copies of digital collections data that is infrequently accessed or changed and doesn't need the level of metadata extraction and format conversion that the Permafrost service provides. Use cases include the outputs of digitization projects, web archives, and exports from digital repositories. DuraCloud will

also be offered in conjunction with the Permafrost service for the storage of archival packages. The ability to use DuraCloud with the OLRC was developed with funding from CANARIE in 2019-20.

Along with the migration, we developed new features to improve the functionality of Horizon, the web dashboard for the OLRC. Large file and directory uploads give users the ability to more seamlessly upload larger amounts of data with Horizon, and the new "protected containers" feature reduces the risk of accidental deletion of data. A new usage statistics panel allows subscribers to easily track their storage usage, and a new IP-limiting middleware is in testing that gives subscribers more control over access to their data.

Large Object Upload To: container 1

File *
Browse... No file selected.

File Name

Note: This upload tool is recommended for file sizes from 100MB to 5GB. If your files are larger than 5GB, please use a different upload tool or contact us for support.

Delimiters ('/') in the file name will place the file into a folder, which will be created when the file is uploaded (to any depth of folders).

Do not close this window while the upload is in progress.

✖ Close   ⬆ Start Upload

The "Large Object Upload" feature in Horizon.

Lastly, improvements were made to centralize and update documentation for the service, and a new email list was set up to improve communications with subscribers. The first community email update on service and tool upgrades was sent in December 2021.

Permafrost

Preservation & Cloud Services

September 2021 marked the third year Permafrost has been running as a production service. In 2021-22 we saw the growth and maturation of the service as our twelve subscribing members continued to provide safe processing and storage for their irreplaceable born-digital and digitized collections. Our members use Permafrost to gather technical metadata to inform preservation management over time, create copies for access, and to place materials in the OLRC as a reliable storage environment. From May 2021 to March 2022 members processed

over 1.3 TB of data across 200 archival packages, making for over 4 TB of archival data in storage.

User support has been key to the success of the service. This year, this has included hosting ongoing onboarding training sessions and community webinars for the 70 staff members at subscribing institutions with Permafrost accounts and publishing new resources, including a [video introduction to the service](#) and troubleshooting guide.

Most importantly, we have been preparing for a large-scale migration of the service to the new OLRC infrastructure, which involves ensuring that all stored data is safely transferred and continues to be accessible to users. In preparation for the move, we first upgraded production instances to Archivematica 1.13 in February 2022. The new service will make use of the DuraCloud application on top of the OLRC, providing more effective preservation management for stored archival packages (see "What's DuraCloud?" above). Users will also have access to the Horizon interface for transferring data and downloading access copies, and planning is underway to integrate Globus as an additional ingest option for large data packages.

Government and Related Literature

Content Services

In the past year, Scholars Portal continued to work closely with the OCUL Government Information Community (OCUL-GIC) to identify and prioritize the local loading of government content.

We are currently working with the OCUL-GIC Digitization Working Group on the digitization of Government of Ontario Telephone Directories, the Ministry of Labour's Occupational Disease Reports, and other health-related content. We have also continue our long-standing collaboration with the Legislative Assembly of Ontario, loading updates and working together to digitize vital and at-risk documents related to the provincial parliament.

Scholars Portal also participated in a collaborative project with the Archives of Ontario and UTL to archive online COVID news and information, capturing content from over 100 community newspapers.

With our easy-to-use and secure metadata editor, developed in-house, we have collaborated with staff across OCUL on updating and enriching metadata for the government information collections already loaded onto Scholars Portal Books. Metadata creation for our Canadian Think Tank collection is almost complete, thanks to our diligent team of metadata experts from across OCUL, who have created almost 8000 records to date!

We will soon be supplying the enriched metadata from some government and grey literature collections to ProQuest's Central Discovery Index (CDI) for improved discoverability in Alma/Primo and other Ex Libris products, starting with the Think Tank collection.

Finally, the Books team has continued to meet regularly with stakeholders from the OCUL-GIC, who offer feedback on our government info metadata, as well as the platform as a whole for searching government info. The feedback group is currently finalizing its work by putting all the input into a final report that will be highly beneficial for future metadata creation for government publications, improving access and discoverability. We are grateful to all of our partners from the Government of Ontario and their input on the unique challenges that metadata for government information may pose.

FLOWING STREAMS

Even a gentle stream is always in motion – and it can host the occasional whirlpool! In 2021-22, some of our long-running services were updated or revitalized to ensure their continuing usefulness to the community.

Scholars Portal Journals

Twenty years after it first launched as an OCUL service, the Scholars Portal Journals platform continues to grow and innovate.

The Journals team continues to load both licensed and Open Access content from more than 40 publishers, adding on average 10,000 articles per day. With this much loading comes plenty of QA, and we have also done some major duplicate cleanup work on the platform this year. This has involved running deduplication checks based on DOI, so that we can remove preprint or online first articles once the formal publication has been loaded. We've also updated our deduplication processes to ensure that when there is a duplicate article, we always keep the version with better metadata. We have also implemented a new program to manage journals that are sent to us under more than one ISSN.

Innovations in Accessibility

Most of the Journals content coming from publishers is now available XML, which can be transformed into more accessible formats. This allows us to overcome the accessibility limitations of the PDF format, which we also continue to receive . The image on the left displays the properly nested heading structure of an article page, making the content easier to use with assistive technologies.
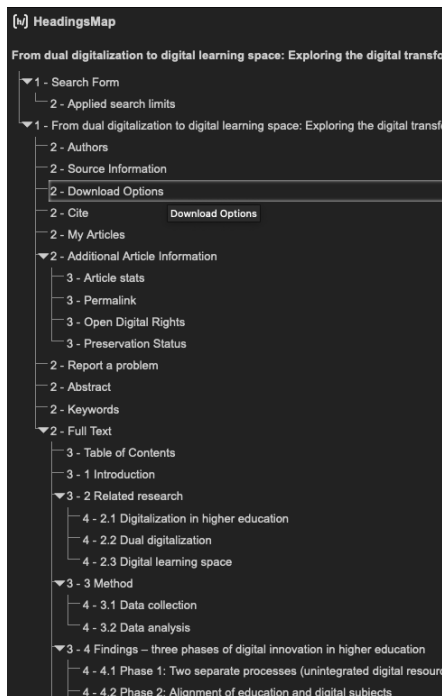
Publishers have also been using markup formatting like HTML as an accessible alternative to PDF, but this is also limiting, as HTML must be read in a browser. To make this content more flexible, we have created an EPUB generator for all of the HTML content, allowing users to save and store accessible copies of articles to be easily retrieved and used with whatever reading environments or assistive technologies they require.
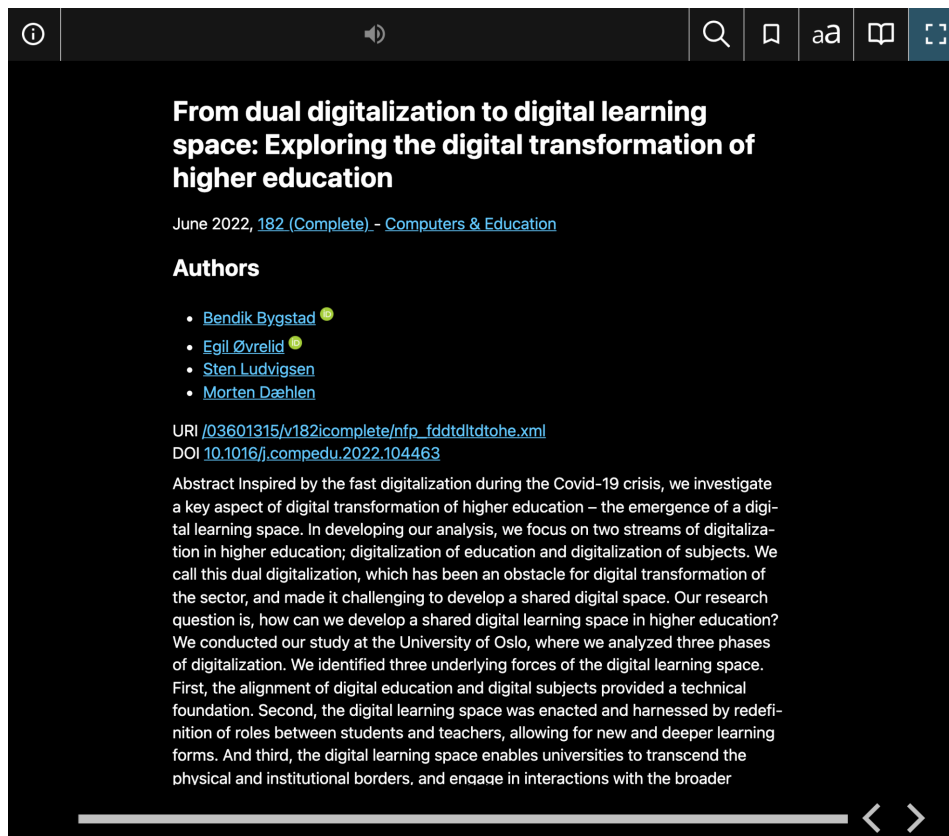
Computers & Education / 182(Complete)

From dual digitalization to digital learning space: Exploring the digital transformation of higher education

Bendik Bygstad, **Egil Øvrelid**, **Sten Ludvigsen**, **Morten Dæhlen**

June 2022, 182(Complete) - Computers & Education
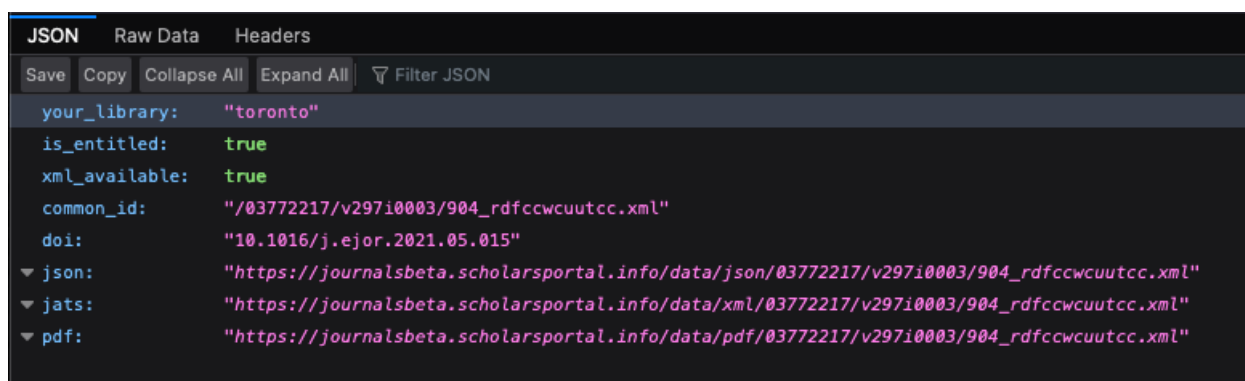

EPUB now being offered as a download option.

EPUB file being displayed in Thorium.

Beta interface for text mining projects

With over 60 million articles aggregated, Scholars Portal Journals platform offers a lot of possibilities for text mining. In response to a request from a researcher at McMaster, we have created a data service that extracts full text from articles on the fly. This service is limited to publisher collections where text mining rights have been obtained.

We are now looking to create tools and tutorials to help researchers get started with their datasets.

```
JSON    Raw Data    Headers
Save  Copy  Collapse All  Expand All   ⊽ Filter JSON
  your_library:     "toronto"
  is_entitled:      true
  xml_available:    true
  common_id:        "/03772217/v297i0003/904_rdfccwcuutcc.xml"
  doi:              "10.1016/j.ejor.2021.05.015"
▼ json:             "https://journalsbeta.scholarsportal.info/data/json/03772217/v297i0003/904_rdfccwcuutcc.xml"
▼ jats:             "https://journalsbeta.scholarsportal.info/data/xml/03772217/v297i0003/904_rdfccwcuutcc.xml"
▼ pdf:              "https://journalsbeta.scholarsportal.info/data/pdf/03772217/v297i0003/904_rdfccwcuutcc.xml"
```

Browser view of the data API for an article.

Accessible Content ePortal

User Services

The Accessible Content ePortal (ACE) navigated choppy waters in 2021-22, with changing pandemic restrictions and limited access to physical spaces and collections.

As the Scholars Portal service with the greatest reliance on physical spaces and physical collections, ACE has had to pivot multiple times in the past two years. Changes regarding access to physical collections, shipping, and the Internet Archive Canada digitization spaces meant a large variation in turnaround times for digitization material, and changes internally at the University of Toronto Libraries have involved regular adjustments to ACE staff workflows and documentation. In addition, we saw an almost complete turnover of our ACE team. However, our new student employees have demonstrated agility and adaptability and we were able to keep the service going with almost no interruptions.

In general, digitization requests have been quite low since the beginning of the pandemic, as many instructors are choosing to set assignments that rely on born-digital materials. However, the volume of requests began to rise again in early 2022, and ACE staff are transitioning to a new workflow that will see a more streamlined delivery of materials for digitization.

A major metadata cleanup project is also underway to remove duplicates in the ACE collection and disambiguate books with similar titles, such as multi-volume sets or different editions of a work. Before 2019, our system was not able to perform an automatic duplicate check when submitting a new digitization request, so we relied on individuals searching the collection before submitting. While we're now able to do this, there are a lot of legacy duplicates, and the metadata imported from the previous Books platform did not always include volume or edition information. This cleanup project will improve the searchability and discoverability of accessible texts on the platform.

Ask a Librarian

User Services

A decade into its operations, Ask a Librarian continues to handle a large volume of research and library help questions.

The volume of questions increased significantly after March 2020, when many libraries closed their physical spaces and reference services moved online. These gains were primarily maintained in 2021, with just a 3% decrease from 2020 — still 41% higher than 2019!

Number of Questions answered by Ask a Librarian

2019: 28713

2020: 41791

2021: 40594

Throughout the pandemic, we have offered extended hours, beyond what was scheduled pre-2020. Over the summer we were open later on weekday evenings and weekends, and during the intersession periods, when Ask would normally be closed, we maintain a reduced schedule.

Coordinators continue to update the Ask a Librarian COVID pages for their schools, so that operators can see the status of each library at a glance.

In September 2021, the University of Ottawa joined our texting service, another great avenue for students to contact the library for help. In the Fall 2021 term, UOttawa received the second-most texts, after Carleton University.

Total answered texting chats per school - Fall 2021
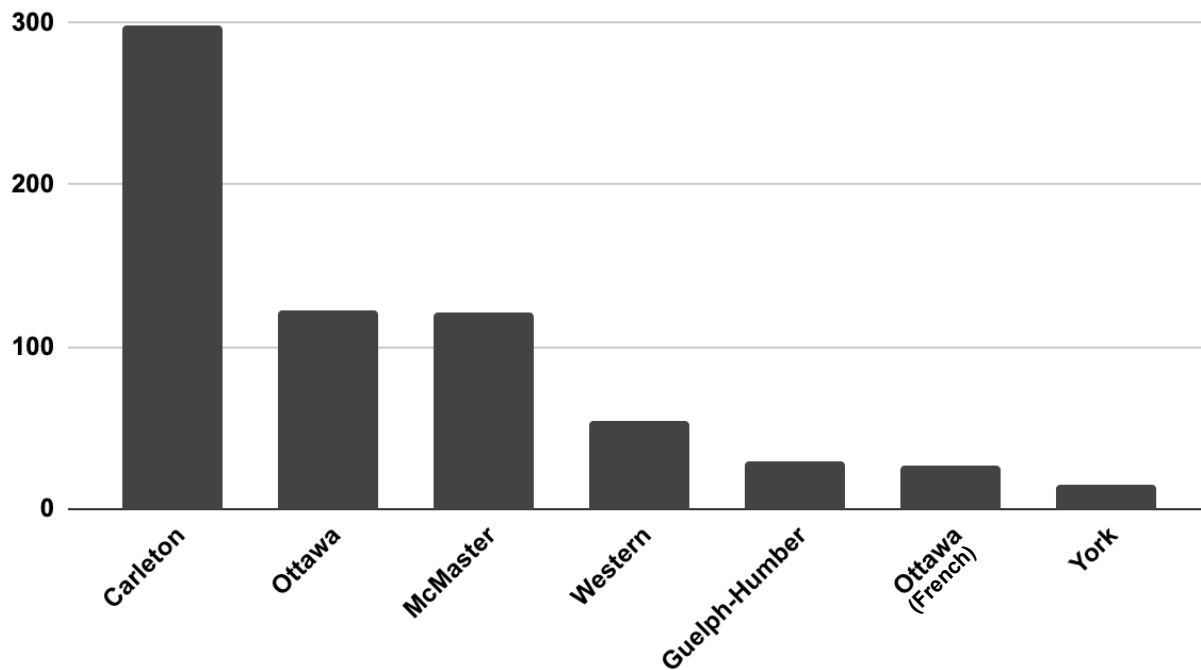
In 2021, a Quality Assurance Working Group (QAWG) was formed. The group, composed of local Ask coordinators and operators and the VR and Assessment librarians at Scholars Portal, is tasked with developing a quality assurance (QA) tool that can be used to evaluate chats and ensure that they are meeting our service standards. The working group developed a rubric and codebook based on ALA RUSA guidelines to assess the quality of chat responses in 5 categories: approachability, interest, teaching (reference questions only), answering, and wrapping up. For each category, the working group considered the RUSA guidelines, our training materials, the user experience of chat, and other factors to set a service standard. In our first round of QA, we reviewed a random sample of de-identified transcripts, and found that the vast majority of chats met our standards in each category, and identified a few specific areas to target in training in order to bring that number even higher. A complete report will be published in 2022, and we plan to do a QA review every two years.

During the month of April 2021, we organized a mini-webinar series where, in addition to the core Ask training, we covered topics such as dealing with difficult users and an overview of specific features in LibraryH3lp, our chat software provider. The complete training archive is available on SpotDocs.

Scholars Portal Books

We continue to grow and steward the collections – commercial monographs, special collections, and otherwise – on our books platform.

In 2021, we added a number of new publishers, including Bloomsbury Publishing and De Gruyter partner presses. We partnered with the Azrieli Foundation to provide access to their special collection of Canadian Holocaust survivor memoirs, free of charge to educational institutions. We also developed new workflows to allow for easy deposit of individually-purchased titles by individual institutions. This will expand our ability to host and preserve content for which our member libraries have purchased rights.

A major project in 2021-22 was reviewing Open Access entitlements. Many publishers, especially university presses, sometimes make their titles available openly on their own platforms, but don't necessarily flag the content as open when they send it to us. We verified the status of open titles and made them Open Access on our platform when we could. A new electronic collection in the Alma Community Zone, Scholars Portal Books: Open Access, includes all of these Open Access monographs and can be activated by any Alma subscribers.

Preservation: Towards an ebook TDR

In 2021, we began processing the first of our book collections for long-term preservation in the Trustworthy Digital Repository (TDR). Processed titles now include visible preservation metadata within the metadata tab (see below). Twenty-six collections have been completed to date, including: ACUP, APA, Brill, Cambridge, Duke, Emerald, IEEE, Karger, Morgan & Claypool, Pharmapress, Taylor & Francis, and Wiley. All eligible collections will be processed by Summer 2022, and our efforts will then turn to ensuring that incoming titles are automatically staged for preservation.

Preservation status link on a book's details page.

Details:	Durham: Duke University Press, 2019
Pages:	xiii, 231 pages
ISBN:	9781478003243 (Print) 9781478003885 (Print) 1478004509 (Unknown) 1478003243 (Unknown) 147800388X (Unknown) 9781478004509 (Unknown)
DOI:	10.1215/9781478004509
Permalink:	https://books.scholarsportal.info/uri/ebooks/eboo
Metadata:	View metadata (BITS)
Preservation:	View status
Collections:	/DUKE/DUKE /DUKE/DUKE/2019 /DUKE

Preservation Metadata   ✕

These tables contain metadata related to the long-term preservation of this book. As part of our commitment to maintaining a Trusted Digital Repository, Scholars Portal provides this information to help our users verify the history and integrity of our digital objects.

Event Log

Event Type	Event Date	Event Detail
Ingest	2021-12-20	

PDF Details

| Property	Value
Identifier	/ebooks/ebooks4/duke4/2019-05-20/1/9781478004509/pdf_fulltext/1640038010493
Preservation Level	full
Format	Portable Document Format v.1.4
Format Registry Link	http://www.nationalarchives.gov.uk/pronom/fmt/18
Size	4592547
MD5	3696a18f1fdac713173161f572ca4f97
SHA-1	493b38a114503740457a838fdbf320020c875a4b
CRC32	3914352455

Object Event Log

Event Type	Event Date	Event Detail
validity check	2021-12-20	Pass

View source XML

Close

Preservation metadata table.
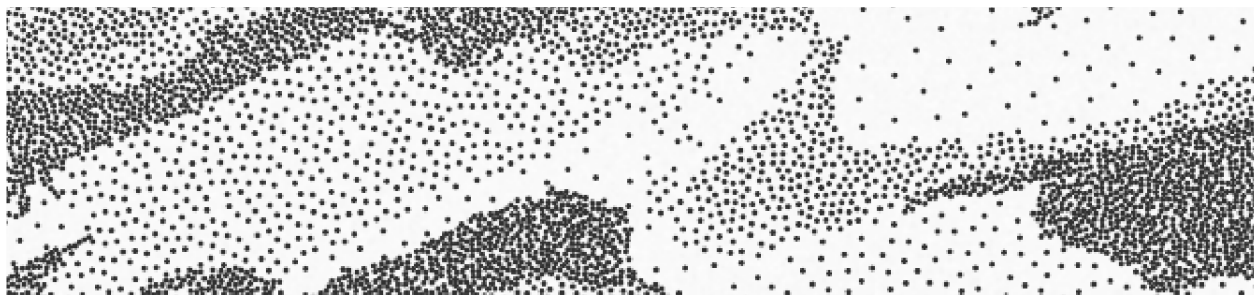
TURNING TIDES

Just as tides turn and recede back into the ocean, so technology may reach the end of its natural life. Services that have made a vital contribution to research and teaching across OCUL may reach a point where the software can no longer keep up with current needs. The functions and collections supported by these services are still necessary, but there are newer and better technology solutions on the horizon.

RACER

In 2021-2022, as universities navigated the turbulent waters of rapidly changing public health restrictions and campus statuses, RACER staff supported member libraries by helping to manage their status for physical interlending of materials, updating the text of user alert messages, and assisting with configuration changes to streamline workflows.

This year we added a new RACER participant – the Université de l'Ontario français – and worked with the consortium of Quebec universities, BCI, to ensure that RACER participants can continue to partner with them for resource sharing.

In order to ensure that RACER can keep providing reliable service until the software's end-of-life in 2024, RACER staff and the Scholars Portal Systems Team performed a major database and hardware upgrade in Fall 2021. RACER's underlying database was upgraded to a new version of Oracle, and the system was moved off an old physical server onto a new virtualized server. This upgrade was completed successfully and with no major difficulties.

RACER & Alma

By summer of 2022, 19 of the 21 OCUL institutions will be using Ex Libris's Alma as their library services platform, either individually or as part of the Omni group. The RACER team has invested time in learning about Ex Libris's resource sharing products and how they interact with

RACER and other OCLC systems. We are also working with outside libraries that have adopted Rapido, Ex Libris's dedicated ILL application, to test compatibility between the systems.

The Omni fulfilment network was launched in June 2021, reducing the volume of loan requests for physical items within RACER as more were placed through Alma. During the Fall 2021 academic term, RACER requests for returnable items at Omni participants were down by 61% compared to Fall 2019. Some of this is attributable to the pandemic; non-Omni partners also saw a decline in requests for returnables, by a more modest 55%. As library users become used to the fulfilment network workflow, and more requests are able to be filled within Alma, this number will continue to drop for Omni libraries.

Several Omni members are also using the Resource Sharing module within Alma to make ILL requests to libraries outside of Omni (including non-Omni OCUL members who use RACER exclusively). However, for Omni libraries that have not yet implemented Alma Resource Sharing, the process of handling requests that were made in Alma but cannot be fulfilled through Omni partners can be onerous, and it often involves staff manually shifting the request from Alma to RACER, sometimes creating a new RACER account for the patron at the same time. The RACER team provides support where possible. More Omni libraries plan to enable Alma Resource Sharing for their requests in summer 2022, and then to set up configurations so that ILL requests from other libraries can be sent directly to Alma Resource Sharing, bypassing the need for RACER altogether. We expect this to be a slow transition, and making these configuration changes will take some investment of RACER staff time.

Scholars GeoPortal

Data Services

Scholars GeoPortal is also facing the sunsetting of the back-end software that powers it, and we're currently working through the second phase of a redevelopment plan. In the meantime, the GeoPortal team continues to be busy receiving and loading geospatial datasets from and for the OCUL community, with several new collections acquired and distributed in 2021-2022. This year, Scholars Portal received nearly 20TB of new imagery including DRAPE 2019 (covering Eastern Ontario), and SWOOP 2020 (covering South Western Ontario).

We continue to stay in regular communication with the Government of Ontario's Land Information Ontario, which provides Scholars Portal with regular updates of Ontario land-based imagery and vector datasets that are not distributed openly through the government's open data portal. These large imagery and derivative datasets are used by many researchers looking for low-cost, high-resolution imagery data in a variety of disciplines. This year we transferred over 30TB of imagery data to researchers across Ontario, using both the GeoPortal's custom clip and ship download option, and the Scholars Portal Globus endpoint transfer option which provides direct download to library staff and researchers.

We have also embarked on a project with partners at the University of Ottawa and Carleton University to load legacy transit route datasets, and a set of digitized and georeferenced Fire Insurance Plans (FIPs) for the City of Ottawa. This pilot reviewed data formats, standard symbology for the collection, metadata requirements, and setup and display options for geospatial data resources held by the two libraries. Developing a standard workflow for local loading of legacy datasets, including historical maps and FIPs, is of great interest to Scholars Portal and the Geo community, especially as we embark on technology renewal and reinvestment this year.

Additionally, Scholars Portal partnered with the University of Toronto Libraries to load a batch of digitized and georeferenced historical maps from the National Topographic System (NTS) series at the 1:50,000 scale (originally scanned by McGill Libraries). The collection includes all map editions covering Ontario and urban area first editions for all of Canada.These maps were georeferenced by funding provided by a partnership between Compute Ontario and UTL. In addition to loading the maps in the Scholars GeoPortal, the group created a Dataverse collection to provide broad access to the maps and to mint DOIs for the image and geospatial datasets. We will continue to build this collection as more georeferenced maps are received from the vendor, in partnership with UTL, McGill Libraries, Canadiana, and others in the larger national historical maps community.

Following up on the OCUL Scholars GeoPortal Phase 1 Upgrade Project (2021-2022), Scholars Portal has been preparing for the full backend server upgrade from ArcGIS Server 10.4.1 to 10.8.1. SP staff have been migrating data and services to the new server environment, conducting performance testing, and evaluating potential integration with new and future front-end catalogue systems to replace the current ageing GeoPortal application. In addition to the data migration and new servers, we plan to release a series of final upgrades to the current GeoPortal application to enable HTTPS for browser end-user security, and fix an outstanding issue with account login. The final release of the migrated and upgraded server will proceed in Spring 2022.

Scholars Portal continues to work with OCUL SPOD and the GeoPortal Business Case Working Group to gather key functional requirements and systems investigations for a funding proposal to OCUL in Spring 2022 for the second phase of GeoPortal development work.

ODESI

Data Services

ODESI continues to serve the needs of researchers looking for Canadian survey microdata in the social sciences, as it has for many years. This year, the ODESI Markit Program had four participating schools (McMaster, Queen's, UofT, and uOttawa) that loaded data onto the platform.Newly released datasets added this year include monthly Labour Force Surveys,

Survey of Financial Security, Canadian Income Survey, Canadian Business Counts, Canadian Alcohol and Drug Survey, and more quality control provided for the collections.

Nesstar and Dataverse

While Odesi continues to be of use, its repository piece, Nesstar, is almost end-of-life. Over the past year, an OCUL ODESI Nesstar Replacement Working Group has been reviewing and assessing technology options to replace Nesstar. In early 2022, the working group presented its final recommendation to select the Dataverse repository software as the replacement for the Nesstar repository system. Preliminary steps are being taken to develop appropriate workflows for the migration of metadata and data between the two systems.

Replacing Nesstar has not been an easy decision, as no single solution fully replaces all the functionality and behaviour of the existing ODESI Nesstar. Moving forward, we will work closely with a new migration working group and OCUL SPOD, to develop a migration and development plan.

Scholars Portal will work closely with the community to ensure a smooth transition for end-users. We are developing migration workflows, and will begin by setting up new collections in Dataverse this spring 2022. Migration of the Canadian public opinion polls will be initiated first, since these collections are distributed and archived by many OCUL libraries including Queen's University, Wilfrid Laurier University, Carleton University, University of Ottawa, and the University of Toronto, who are already using Dataverse for their institutional research data collections. Moving forward ODESI will use Dataverse.

As Dataverse is now a national service, under the governance of the four regional library consortia, SPOD has started to consider if and how the governance and funding of ODESI will need to evolve once the data has been moved to that platform. To that end, OCUL SPOD members have initiated conversations at the Dataverse governance group and will develop a sustainability plan for approval by OCUL Directors by Fall 2022.
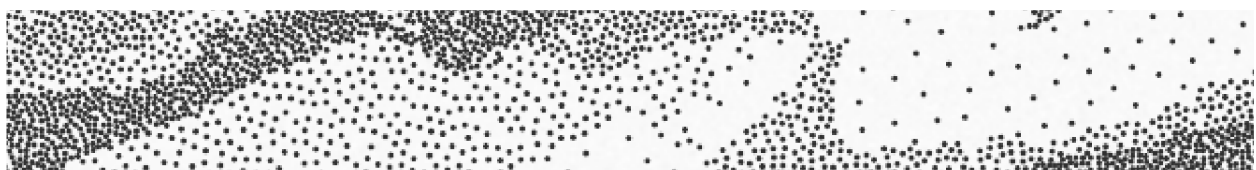
BUILDING BRIDGES

No service at Scholars Portal is an island. Many bridges hold us together, connect us with our member libraries and our end users, and help us develop partnerships that move our services forward.

Systems

The Systems Team continue their never-ending task of ensuring all services are secure, up-to-date and functional. In addition to supporting every single one of the upgrades, migrations, and new features mentioned above (particularly with regards to the OLRC), the Systems Team has led several behind-the-scenes upgrades of our technology infrastructure.

In 2021-22, we migrated to Chef-controlled systems, to allow us to more quickly spin up new virtual machines and increase reliability and visibility of our services. We migrated all of our virtual machines from old to new hardware, and provided continuous upgrading of software and the underlying operating systems.

In addition, we mitigated security vulnerabilities with Samba and Log4j. We spent long hours on evenings and weekends fixing the Log4j zero-day vulnerability, patching all of our systems with minimal impact on services. Recently we also added Multi Factor Authentication to SP services with public account access, including NextCloud and our internal messaging Mattermost platform.

In addition to security and functionality updates, we also monitor potential cost implications of services. In 2021-22 we mitigated usage cost increases for the SPOTDocs Confluence license by identifying and deactivating user accounts with no activity in the past 2 years.

Web & Publishing Services

User Services

The OJS upgrade to 3.3.x was finally completed for all twelve members. The new server setup and deployment workflows proved themselves a few weeks ago when PKP announced a

security upgrade (3.3.0.10) and all instances were upgraded in approximately two days with hardly any downtime.

Our OJS harvesting and preservation efforts continue to grow. Almost 180 library-published OJS journals from across Canada are now included in our Journals TDR.

This year we continued to work on accessibility improvements across several of our front facing sites and services. In addition, we've made improvements to our IP filtering. When a user on an unrecognized IP tries to access a Scholars Portal resource which has IP address restrictions for access, they are now redirected to a page indicating the IP restriction for an improved user experience. This primarily affects staff-facing websites, such as our Admin Tool for ebooks and the SPUD usage data tool for journals.

Communications

Scholars Portal Day(s) 2021

After the success of the online Scholars Portal Roadshow in spring of 2020, Scholars Portal and OCUL-SP decided to experiment with a new kind of Scholars Portal Day in 2021. While SP Day is normally a one-day, in-person (and live-streamed) event in December, in May 2021 we held an online event with the same kind of content, spread out over two days.

SP Day(s) 2021: Unearthed Infrastructure took place on Zoom over two half-days, May 6 and 7. Presentations focused on the ways that social, physical, and technological changes have forced us to uproot our familiar ways of working, exposing both hidden faults and buried strengths. The event saw 276 unique attendees – almost twice as many as the number that are usually able to attend an in-person SP Day event.

Feedback, about the spring date, the online mode of delivery, and the content itself, was extremely positive. While some attendees missed the informal networking that happens at in-person SP Day, many reflected that they are rarely able to travel to attend.

In May 2022 we will be holding another online SP Day(s) event. Once pandemic restrictions are fully lifted we will consider switching between in-person and online events, but we know we will have to improve the livestream quality for our in-person events.

Scholars Portal Newsletter

In September 2021 we launched the new Scholars Portal Newsletter. Developed under the guidance of the OCUL-SP committee, this tri-annual newsletter is targeted to those who use SP services in the course of their work, but aren't necessarily heavily involved with us. The

newsletter highlights new collections, bug fixes, features and enhancements, and any major developments in services. Each newsletter also includes a spotlight section contributed by a member, describing how a Scholars Portal service is used in their work. The response to the newsletter so far has been positive, although we anticipate that it will take a few more issues before it builds up a regular audience.

https://learn.scholarsportal.info/news

Learn with Scholars Portal Webinar Series

A new webinar series, "Learn with Scholars Portal", draws on the specialised skills developed by Scholars Portal staff to help OCUL library staff develop practical, technical skills and expertise in new areas.

Scholars Portal staff have developed an incredible wealth of technical skills and domain knowledge in the course of maintaining shared library technology infrastructure, but by and large our communications focus on updating the OCUL community about the state of our services and projects. This series gives us the opportunity to share our skills and knowledge, while providing a PD opportunity to our member libraries.

The first four webinars in this series have received extremely positive feedback and the recordings have been viewed and shared widely. As of April 2022, these recordings have been viewed over 400 times. We intend to continue this series and anticipate running 4-5 webinars a year.

Learn with Scholars Portal topics to date:
- Digital Preservation
- Web Accessibility
- Usage Statistics & Web Analytics
- Linked Data

https://learn.scholarsportal.info/webinars

External Partnerships

Shared Repository Infrastructure Working Group

With support of SPOD and the OCUL-SP committee, we are moving forward with investigating the feasibility of a shared institutional repository infrastructure across OCUL. Since other groups are involved in similar conversations, we are liaising with CARL's repository working group and the other Canadian consortia to ensure that we aren't duplicating any efforts, and to potentially leverage work that is happening in those venues.

Cloud Services

While the Ontario Library Research Cloud (OLRC) service model has allowed for subscribers outside of the consortium since the first pricing model was introduced in 2017, the high pricing differential between OCUL and external subscribers was a deterrent to institutions outside of Ontario joining. As part of the OLRC upgrade, which also included increased storage and the ability to use the old hardware for testing and development, Scholars Portal staff and SPOD worked together to develop a new pricing model that better aligned external subscriber fees with OCUL subscriber fees. This new pricing model was approved in 2020, and it allowed us to welcome Concordia University in Quebec and St. Francis Xavier University in Nova Scotia to the service in 2021. This successful expansion opens the door for additional universities across the country to subscribe to the OLRC, supported by CANARIE and local computing networks.

CRKN and TDR

Scholars Portal's Trustworthy Digital Repository (TDR) provides the preservation services for the Scholars Portal Journals platform, which includes journals licensed through OCUL, but even more journals licensed through CRKN. In 2017, a task group was formed to investigate the possibility of expanding the scope of the TDR to encompass CRKN libraries. This partnership would involve the development of an admin tool for Scholars Portal Journals, extending local loading rights to institutions outside of OCUL and possible changes to the governance of the TDR. A formal proposal for this work will be voted on at the CRKN Meeting of the Members in Fall 2022.

FRAME

In 2022, Scholars Portal was approached by the University of Virginia to participate in the second phase of the Mellon-funded FRAME project (Federated Repositories of Accessible Materials for Higher Education). The FRAME grant aims to develop a federated index and search of remediated accessible content, typically transformed by a disability services office at the initial requestor's home institution. There is much interest in adding ACE to this federated search, and in doing so exploring the procedure for sharing internationally under the Marrakesh framework. For OCUL, this partnership may provide another tool for local accessibility offices to locate and request remediated items for students and faculty.

STAFFING

Welcomes:

Yuriy Czoli - Programmer/Analyst
Jessica Hymers - Metadata Production & Electronic Access Specialist
Alicia Urquidi Díaz - Metadata & Data Services Librarian

Welcome back:

Meghan Goodchild - Research Data Management Systems Librarian
Jacqueline Whyte Appleby - Scholarly Resources Librarian

Farewells:

Amaz Taufique - Currently at the University of Toronto
Andy Foster - Currently at the University of Toronto
Kara Handren - Currently at the University of Toronto
Katya Pereyaslavska - Currently at Western University
Alicia Cappello - Currently at Queen's University