

Scholars Portal
Report to the OCUL Directors
2022/2023

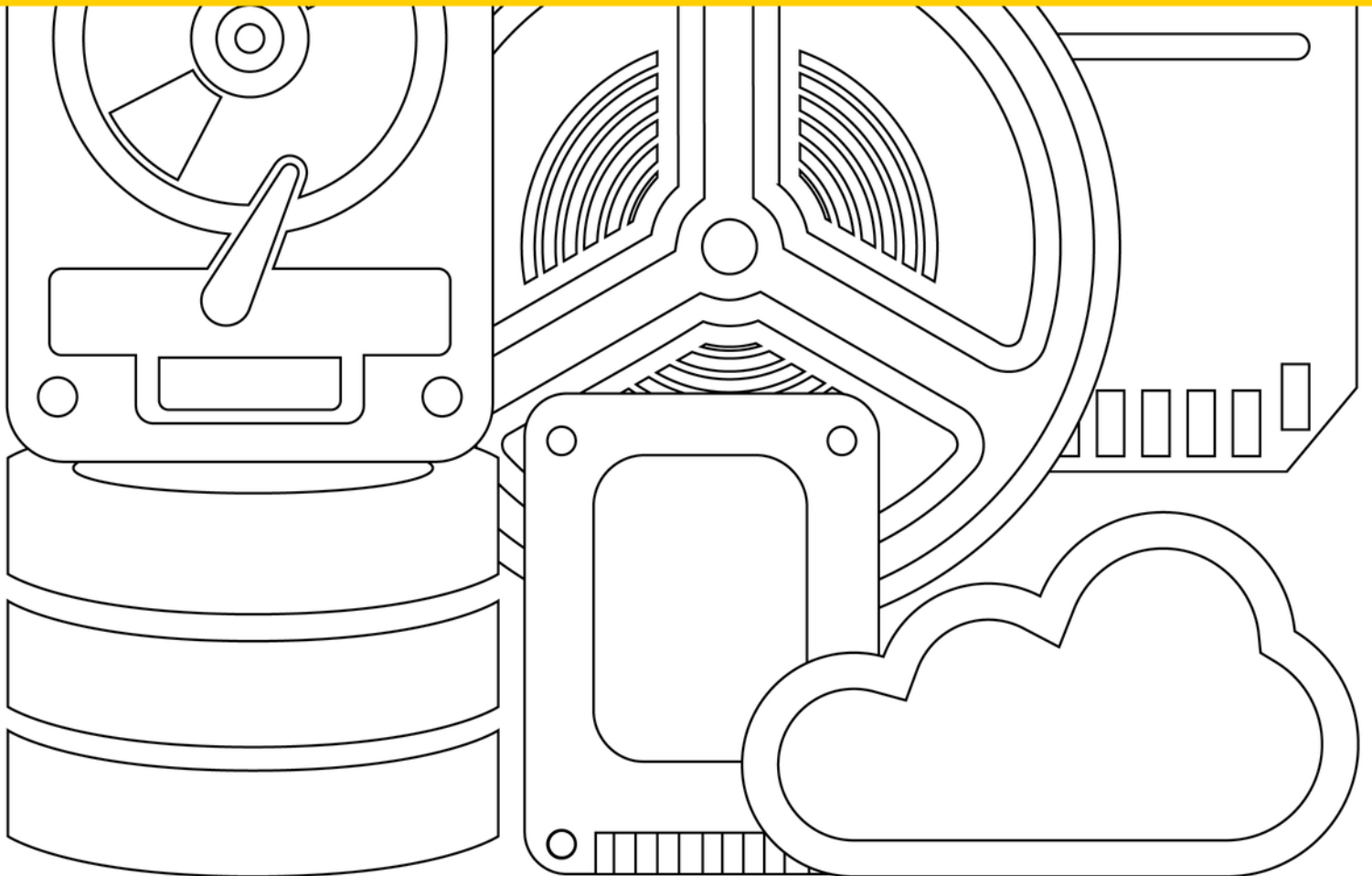


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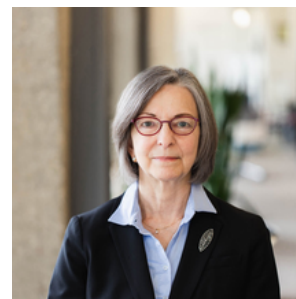
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Message from SPOD



As the chair of the Scholars Portal Operations & Development (SPOD) Committee over the past three years, I've been consistently impressed by the breadth and quality of Scholars Portal's work. 2022-23 was a year of planning and fostering new ideas, adapting, and initiating several transitions to new systems and platforms. This year, SPOD really came into its own in its role in providing support, input, and direction for the work of Scholars Portal. I particularly want to highlight the contributions of our working groups.

The idea of a shared repository infrastructure arose from discussions at the OCUL-Scholars Portal (OCUL-SP) Committee, as representatives from multiple institutions identified a need for upgraded repository software and the potential for creating efficiencies by centralizing the service and support. SPOD, working with OCUL-SP, formed the Shared Repository Infrastructure Working Group to investigate the current landscape, including coordinating with similar projects going on at the national level, and making recommendations about next steps towards such a service. This working group issued a final report in winter 2023, and we anticipate moving forward with a pilot project later this year.

After 15 years, the Odesi social science research data platform is moving to a new home in 2023. Odesi's collections will be migrated to Borealis, the Canadian Dataverse Repository. This migration is the culmination of the important work that Scholars Portal has been conducting over the past few years to replace Odesi's end-of-life data repository. Scholars Portal has established a robust set of workflows to ensure an effective migration, cementing OCUL's commitment to open data and enhanced access. The move to Borealis marks a journey to a national data infrastructure that will support the ongoing sustainability of the service for future generations of users. The Odesi Futures Working Group has been charged with examining the service models and sustainability needs of the service in order to help shape that vision, looking for ways of working that encompass open access, distributed curation models, and building connections with the wider research data community in Canada.

Finally, we're looking forward to the creation of at least one new working group in 2023-2024. In keeping with our goal of providing proactive, user-focused, and evidence-based services, SPOD and Scholars Portal are piloting a framework for establishing community-driven assessment of Scholars Portal services. This service assessment framework explicitly takes into consideration viewpoints from all levels of OCUL member libraries when reviewing Scholars Portal services. The Accessible Content ePortal (ACE) service will be the first to undergo this process later this year.

As I complete my last as SPOD Chair, I take my hat off to the Committee and the Scholars Portal team. I'm extremely proud of the work that we've accomplished and of our development into a strong and effective committee within the OCUL structure. Please join me in appreciating all of the achievements laid out in this report, and looking forward to what comes next.

Sincerely,
Beth Namachchivaya
University Librarian, University of Waterloo
Scholars Portal Operations & Development Committee Chair, 2019-2023

Introduction

Message from Scholars Portal



Here we are at the end of another year, and I'm delighted to share the highlights of Scholars Portal's work with you. We've organized this report on two structures. The first is OCUL's core principles, reaffirmed in the strategic plan refresh in fall 2022: advancing research, advancing teaching and learning, advancing academic libraries as leaders in social change and inclusivity, developing and supporting robust infrastructure, and demonstrating value. As OCUL's technological infrastructure arm, Scholars Portal's work is guided and framed by these principles.

The second structure is the theme that the OCUL-Scholars Portal Committee selected for Scholars Portal Days in May 2023: Refresh/Reframe/Renew.

Library infrastructure is dynamic, and so are the collaborations that support it. Each moment of change represents an opportunity to reflect on what we do and how we do it, to learn from what's come before and consider how we can improve going forward. We rethink the framing and structures that support our work, revitalize the user interfaces we rely on, and sunset software and service models to make room to sunrise something new.

This is a particularly relevant theme for us as many of the services we initially launched in the 2000s are reaching a stage of maturity. Some, like Odesi and the Scholars GeoPortal, are facing full-scale redevelopments, while others, like RACER, are heading towards the sunset. Meanwhile, new services continue to grow and expand to meet libraries' technological infrastructure needs.

As we reach these decision points, we are able to align our services to make better use of underlying technologies and leverage existing infrastructure. We're increasingly working across platforms, which allows us to find efficiencies and develop new connections between content types, workflows, and functionalities. We are also continuing to evolve our collaborations, creating new partnerships and deepening existing partnerships in Ontario, across Canada, and even internationally.

The Odesi renewal is a result of all of these forces in action, and a successful example we would like to follow with future projects. Working with the OCUL data communities and supported by Compute Ontario, we have been able to migrate the backend data collections from the old, end-of-life repository software that has been powering Odesi since 2008. The Odesi collection's new home is in Borealis, the Canadian Dataverse Repository, which began life as a Scholars Portal service and has now moved up to a national collaboration. Taking advantage of the new functionalities that Borealis offers, we're redeveloping the front-end Odesi search site with enhanced features and an ideal user experience.

We have a lot to look forward to in 2023-24, with the Scholars GeoPortal redevelopment on the horizon, the expanding partnership between ACE and the US-based EMMA repository, the winding down of RACER, the migration of our SPOTDocs wiki site, the institutional repository pilot, and so much more.

But for the moment, please take a moment to read this report and reflect, as I have, on the amazing accomplishments of Scholars Portal staff, OCUL committee and community members, and our many partners. We are a technological infrastructure organization, but we can never forget that our infrastructure is envisioned, built, and maintained by collaborations of talented and dedicated people.

Sincerely,
Kate Davis
Interim Director, Scholars Portal

Scholars Portal Journals: Continual Innovation and Improvement

The excellence of the Scholars Portal Journals platform is driven by continual innovation and improvement. This year, we made several changes to improve the user experience.

As more conferences are streamed digitally, we've started to receive video recordings of conference talks as supplementary materials for conference papers. Having access to the original presentation itself, rather than just the conference paper or slides, is incredibly valuable for researchers as it allows them to engage with the content in its original form, as presented by the authors. We're working to alter our loading processes to accommodate the larger file size and make these videos available to users from our platform.

We've also improved our handling of related articles. Retraction notices and retracted articles are linked directly to each other. Other related articles are also linked, such as addendums, corrections, and expressions of concern.

[Lebende Sprachen / 62\(1\)](#)

Translation Difficulty: How to Measure and What to Measure

[Alireza Akbari, Winibert Segers](#)

April 2017, 62(1), p.3 - 29 - [Lebende Sprachen](#)

⚠️ This article has been retracted: [/00239909/v66i0001/197_tdhtmawtm.xml](#)

Persistent Identifiers

A persistent identifier (PID) is a long-lasting reference to a digital resource. It reliably points to a digital entity. An ORCID iD is an example of a persistent identifier for a person and a DOI (digital object identifier) is a persistent identifier for entities such as journal articles, books and datasets. PID is key for citing and linking in scholarly communication, therefore it's substantial to include PIDs in metadata. The Scholars Portal Journals team developed programs to obtain the DOI and ORCID iD from the Crossref database and ORCID public data files when PIDs are not in the publishers' source data. Over the past year, 205,695 DOIs and 508,649 ORCID iDs have been added to Scholars Portal's journal article metadata.

Text and Data Mining

With so much carefully curated metadata in one place, Scholars Portal Journals is a wealth of data with incredible potential for analysis. Since May 2022, we added text mining capabilities to the platform to help support researchers in building datasets. Documentation and sample harvesting scripts are [available on GitHub](#). The API allows for corpus building and harvesting of metadata and full-text data, while maintaining entitlements.

Advancing Research

Scholars GeoPortal: Partnerships for Access and Preservation of Historical Maps

This year, we were excited to partner with a variety of stakeholders across the library and computing sector to add an Open Access historical map series to the Scholars GeoPortal.

The [Historical National Topographic System \(NTS\): 1:50,000 Scale Maps](#) series includes more than 15,000 maps and stretches across Canada and across time, covering the period of 1948 to today, providing an invaluable record of changes to the natural and human geography of the country. Digitization for a large portion of the series was completed by the McGill University Library and released as part of the online Canadiana collection. The University of Toronto Libraries, with funding from Compute Ontario, are georeferencing the maps in order to create geospatial datasets to download from Borealis or to view and explore on the Scholars GeoPortal.

The Scholars GeoPortal is a platform built on the collaboration between Ontario's university libraries, and we're thrilled to be part of projects like this that rely on the collaboration of libraries and library organizations Canada-wide. Today, the most popular collection on the GeoPortal is [another set of historical topographic Ontario maps](#), previously digitized and georeferenced by OCUL. This broader, national collaboration adds an even larger map series covering a wider geographic area and timespan to the GeoPortal's collections. We look forward to continuing to strengthen the relationships made through this work.

Read more about this initiative: [Building Digital Research Tools for Open Access to Canada's Historical Topographic Maps and Data](#)



Odesi: New Beginnings

After 15 years, Nesstar, the backend repository that supports Odesi, is reaching its end of life. Borealis, the Canadian Dataverse Repository, was selected as the replacement repository to provide backend support to Odesi collections. Borealis provides extensible features for Odesi collections and data users, with a bilingual interface, including:

- Data Documentation Initiative (DDI) standard metadata
- DOIs for persistent data citation
- Collaborative workflows, including file versioning, curation, and built-in preservation for library administrators

Once the migration is complete, the Nesstar repository will be phased out and we anticipate a final sunset date in early 2024. This work is supported by a grant from Compute Ontario.

We're working with our partners to integrate the new repository with an updated, modernized and accessible Odesi search interface in order to ensure the continued support for features such as full-text searching, data download, and statistical analysis by end-users.

Upon the new release, much of the data in Odesi will be open and accessible to all researchers, in the spirit of the FAIR principles (Findable, Accessible, Interoperable, and Reusable). Moving forward, OCUL is working with a variety of stakeholders and partners to develop a model for the service's ongoing sustainability.

The screenshot shows the Odesi search interface. At the top, there is a navigation bar with 'ODESI' and 'Français' on the left, and 'My List 0', 'Browse', 'How To', 'Contact', and 'Deposit Data' on the right. The search area includes a 'Find data:' section with a text input containing 'Smoking' and a dropdown menu set to 'Anywhere'. Below this are 'Collection:' (set to 'All'), 'Sort:' (set to 'relevance'), and 'Date (YYYY):' fields. An 'Include:' section has a checked radio button for 'Research datasets'. A blue 'SEARCH' button is at the bottom of the search area. To the right of the search area, a text box states: 'ODESI contains over 5,700 datasets for the social sciences, with more than 22,700 additional dataset descriptions available for searching.'

Results page 1 of 43
Showing 1 to 20 of 851

Current Population Survey, February 2002: Tobacco Use Supplement (TUS), 2001-2002 Wave

smokingsmoking cessation...the entire supplement, whereas proxy respondents were only eligible for questions on the topics of **smoking** status (Items PES32-PES34) and the use of other tobacco products; for example,.....depending on their **smoking** status -- former, everyday, or occasional (Items...

EXPLORE VARIABLES

Limit your search:

Keyword

- Social Sciences 343
- smoking 269
- tobacco use 130
- health 120
- mental health 114
- alcohol consumption 112
- Income 112
- Age 110

Census Data

Some of the most popular datasets on Odesi are the census microdata. We're happy to be working with the Canadian Census Data Discovery Project to improve discovery of and access to census data. Read more in our newsletter spotlight: [Improving Discovery of Canadian Census Data, Pre-Confederation to Today.](#)

Scholars Portal Books: Enhancing Discoverability and Access

To keep our books discoverable, we work closely with knowledge base partners to make sure our collections are available for activation in Alma, SFX, and Serials Solutions 360. Beginning in 2023, the Canadian University Press collections will also be available for activation in OCLC's WMS knowledgebase (KB), used by many schools in the BCI consortium.

A presence in these different knowledge bases is essential now that Scholars Portal Books is an access point for many additional schools outside of OCUL, who use a variety of KBs. This expansion is the result of the new CRKN-De Gruyter Association of Canadian University Presses (ACUP) deal, which offers the full catalogue of the ACUP presses with new terms, including multi-user access for every single title. This deal represents a true partnership, with content being shared back and forth between De Gruyter and Scholars Portal as we work to ensure exact parity between our collections.

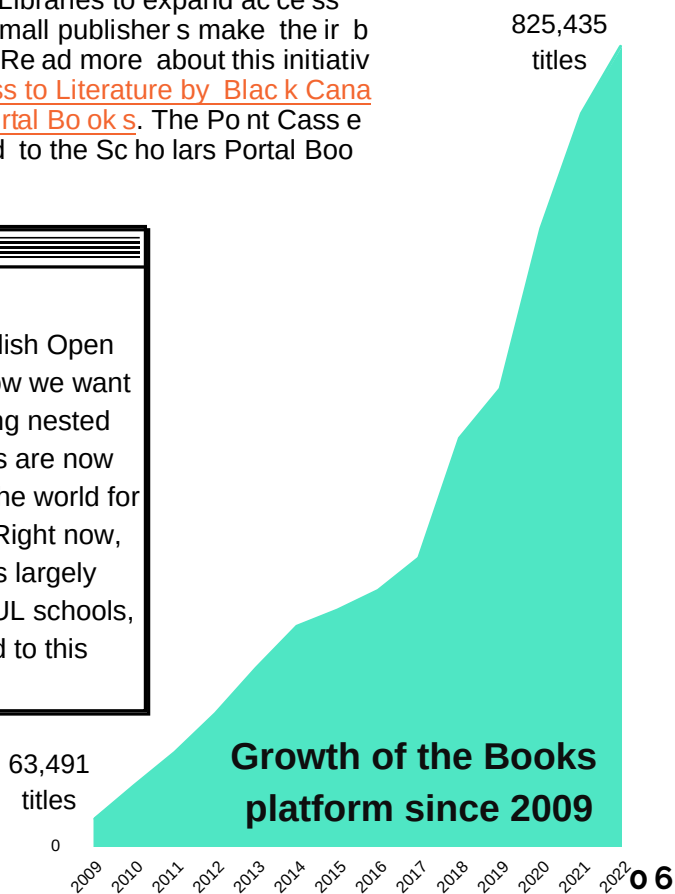
All participating schools will have dual-access on the De Gruyter and Scholars Portal platforms, but with in-browser reading and a bilingual interface, Scholars Portal Books may remain the platform of choice for many CRKN schools.

As the ebook landscape continues to evolve, the use cases for the Scholars Portal Books platform are evolving, too. Over the last year, we've worked with individual libraries to load one-off titles and small collections that do not otherwise have a home online.

For example, an initiative at the University of Toronto Libraries to expand access to literature by Black Canadians has helped several small publishers make their back catalogues available as ebooks for the first time. Read more about this initiative in our new sletter spotlight: [Expanding Digital Access to Literature by Black Canadians with the University of Toronto and Scholars Portal Books](#). The Point Cassé collection is available to everyone and has been added to the Scholars Portal Books: Open Access Alma collection.

Open Access

As presses, particularly university presses, increasingly publish Open Access (OA) monographs, we're putting more thought into how we want to ingest, manage, and share these titles. In addition to being nested within individual publisher collections, all open access books are now included in a platform-wide OA books collection, available to the world for activation in Alma as Scholars Portal Books: Open Access. Right now, we have over 750 fully OA academic titles! While our focus largely remains on loading commercial publishers purchased by OCUL schools, we welcome suggestions for open academic books to add to this collection.



Clavardez avec nos bibliothécaires Awarded

Le Prix Micheline-Persaud is awarded by ABO-Franco, the Francophone division of the Ontario Library Association, based on evaluated nominations from the academic library community and honours an individual, group or institution that has distinguished itself in the development and promotion of French-language library services in Ontario. Scholars Portal was nominated by Annie N'tula Mankeni, User Engagement Coordinator at the University of Ottawa Libraries and the local area chat coordinator.

Clavardez first launched in 2014 as an OCUL collaboration with the libraries at the University of Ottawa, Laurentian University and Glendon Campus, York University, to provide equal access to reference help for French speakers. Today, Clavardez has merged with Ask a Librarian into one seamless, virtual reference service and more than 30,000 chat inquiries were answered from across Ontario in 2022.

This service has extended hours; it's available from anywhere, on the web or by text message; help is immediate and the experienced personnel are trained to provide local and reliable answers to library and research questions. We can see that the service was highly used during the pandemic, which shows that it's an essential service. Additionally, numerous messages and statistics tell us that it's a service our students appreciate enormously.

–Catherine Lachaine, University of Ottawa and Chair, ABO-Franco

For my part, as both an employee at the University of Ottawa library and as a student, I find it compelling, beneficial, and remarkable to have a service so widely available outside of business hours; in the evening and even during weekends.

–Annie N'Tula Mankeni, University of Ottawa



Text a Librarian!

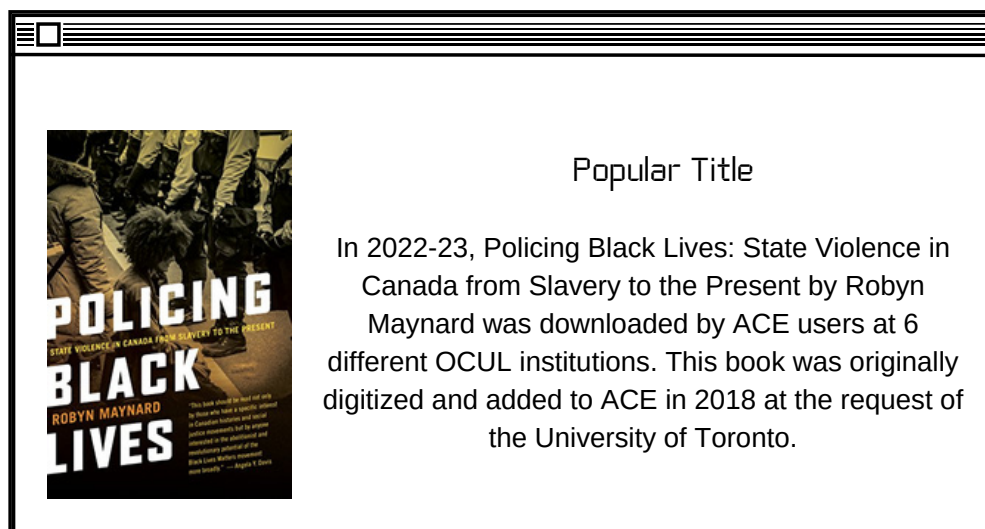
Since we first piloted offering Ask services by text message in 2019, five of our 16 Ask participants have signed up. Texting is most popular at Carleton University, thanks to a successful promotional campaign. Read more about their success in our newsletter spotlight: [The True Story behind Carleton's Texting Success with Ask a Librarian, from Zero to Hero.](#)

Collaboration and the Accessible Content ePortal

In 2022, the Accessible Content ePortal — better known as ACE — became the first repository outside of the US to participate in the Federating Repositories of Accessible Learning Materials for Higher Education (FRAME) initiative. FRAME is a two-year project funded by a \$1,000,000 grant from the Andrew W. Mellon Foundation to the University of Virginia, and aims to address challenges faced by students with print disabilities when accessing academic materials.

The project is a collaboration between eight universities' libraries and disability services offices, along with four major repositories of content: Benetech's Bookshare, the Internet Archive, HathiTrust, and now ACE. FRAME aims to create a system to enable the sharing of content that has been remediated by any of the members with qualified recipients at any other member institution. The project has resulted in the creation of a [fifth repository, EMMA](#), which stores remediated content not originating in one of the member repositories and provides a unified search across all the repositories, employing a sophisticated user interface based on a new metadata model describing remediated content. All ACE records will be uploaded to EMMA in spring 2023.

As the first participant beyond the US, ACE is able to test the issues involved in sharing content across countries that are signatories to the [Marrakesh Treaty](#). Signatories to the Marrakesh Treaty have harmonized their copyright laws around the creation of alternate format materials for people with print disabilities, but they may still have very different regulations or requirements about things like privacy, which impacts the dissemination of accessible content.



Collaboration and the Accessible Content ePortal

ACE coordinators from all OCUL institutions can access EMMA and search for accessible and remediated texts from all partner repositories on behalf of library users with print disabilities. Search can be limited by remediation date, various accessible formats, features and accessibility level.

Another feature of EMMA is a bulk upload tool allowing OCUL members to share remediated content straight to EMMA. This will enable OCUL members, for the first time, to share the work they put into remediation with other institutions and users. The EMMA development also includes work on metadata for remediation that we hope to adopt for locally scanned and remediated texts on ACE.

The EMMA project is an important initiative for lowering barriers on behalf of students with print disabilities. It is exciting that ACE is involved in this project and is working with an impressive set of partners, including Bookshare and the Internet Archive. Creating fully accessible content is a challenge which crosses geographic and organizational boundaries, and EMMA is a good example of leveraging partnerships to achieve a common goal.

– Art Rhyno, University of Windsor

We use Bookshare quite extensively during the academic term. If we were not able to access the Bookshare collection, we would need to scan these materials in-house, which would delay access for the students. The ability to access items immediately in multiple formats is incredibly beneficial to my students' academic progress. The search function is easy to use, and books are often provided in the format the student has requested, so there is no need to remediate.

– Nancy Waite, McMaster University

Using EMMA as a federated search tool that searches across multiple repositories has streamlined our staff workflows and saved processing time and effort. This has resulted in substantially improved service to our users, since books found through this partnership can be made available to students immediately rather than waiting for the book to be digitized. We are looking forward to future enhancements to the partnership which will allow for even more streamlined and efficient service.

– Joanne Oud, Wilfrid Laurier University

Streamlining & Efficiency

Most of the content that we digitize for ACE is drawn from the University of Toronto Libraries (UTL). This year, we worked with the library services platform team at UTL to streamline our ability to request and receive the titles we need to digitize. Instead of physically visiting libraries across the St. George campus to find books, we're now integrated with UTL's existing systems for retrieving and transiting materials across many campus libraries, saving time and creating efficiency in the process.

Accessibility Improvements at Scholars Portal Journals

Thanks to some exceptional community feedback from Wilfrid Laurier University, we've made several changes to make the Scholars Portal Journals platform more accessible. Our page structures are now easier to navigate for screen reader users, and we've made articles available as EPUB and HTML downloads when possible. We're also working towards improving the platform to better facilitate a "PDF Pitstop," a method for blind users to quickly and easily request alternative formats, remediation, or other help with inaccessible articles. Read more about this initiative in our newsletter spotlight: [Laurier Library, the CNIB, and Scholars Portal Journals](#).

 PDF Download	 EPUB	 HTML	 Save Citation
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URI https://resolver.scholarsportal.info/resolve/00489697/v717icomplete/nfp_agsossgtiso2.xml 

DOI <https://doi.org/10.1016/j.scitotenv.2020.137188> 

Open Digital Rights	Preservation Status	Report a problem
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Developing and Supporting Robust Infrastructure

Building Towards a Scholars GeoPortal Redevelopment

The Scholars GeoPortal turned 10 in 2022. It's an exciting milestone but also means that we need to renew some of the technological infrastructure that supports the GeoPortal. As part of this project, we upgraded to the latest Esri ArcGIS Enterprise software (version 10.8.1) and enabled HTTPS security for web access to the GeoPortal, which will support required maintenance updates and set up a new environment for future enhancements.

Meanwhile, a working group was assembled to draft a formal business case and list of functional requirements for the future of the GeoPortal's frontend interface. The working group laid out functional requirements and specific recommendations for the GeoPortal redevelopment, such as modernizing the frontend of the GeoPortal application using the latest web frameworks and technologies, and the integration of a data loading tool that would enable our member libraries to upload their own local GIS data collections to the portal.

Survey of the OCUL Geo Community

I have found the GeoPortal a particularly useful resource for developing engaging lab assignments for my GIS students. Not only the data themselves, but also the help files and explanations of geospatial topics.

– Faculty at York University

I refer undergrad and graduate students to the Geoportal as a main source for authoritative data of Ontario.

– Faculty/Staff at Wilfrid Laurier University

I still refer to GeoPortal regularly to try and identify useful data layers to my locations of interest. Although municipalities and the Province have gotten much better in recent years at how they share their data, the GeoPortal has the advantage of being one-stop, and sometimes contains interesting layers from databases I may be unaware of.

– Faculty/Researcher at the University of Toronto

75%

report that librarians/library staff use the GeoPortal often or very often to **support users**

88%

report that **librarians/library staff** use the GeoPortal for **instruction**

56%

report that **faculty** use the GeoPortal for **instruction**

The feature of the GeoPortal that was identified by a majority of respondents as most integral to supporting library services was the Search and Discovery of Geospatial Datasets, followed by Downloading of Data (including subsets of large files via “clip and ship”), and the ability to Explore and Visualize Data on the map viewer.

Storage and Preservation Infrastructure

Increased Functionality and Security

This year, we made some technical upgrades to increase functionality and improve the security of preserved items on Permafrost and the Ontario Library Research Cloud (OLRC). Permafrost was migrated to OLRC 2.0, allowing us to make full use of the preservation features of DuraCloud, including independent integrity checks, automated ingest, and synchronization of additional copies with separate storage providers.

To support large file ingest for Permafrost, we've also developed an integration with Globus. Globus supports the transfer of very large files, or complicated file structures, and is a tool also used by the Scholars GeoPortal and several other services.

Supporting the Permafrost Community

To support Permafrost users, we've introduced community calls, where we can share our expertise and discuss issues of interest to the digital preservation community, including workflow development and approaches to various file formats. We're also supporting Permafrost and OLRC clients with [new user guides](#) to facilitate their work and new scripts to provide more advanced statistics.

Coast to Coast

In 2022, a new external pricing model was approved, allowing institutions outside of OCUL to subscribe to Permafrost. We already have two new subscribers to welcome into the Permafrost community: the University of Alberta and the National Gallery of Canada. The OLRC also welcomed three new subscribers, the University of Victoria, the University of Alberta, and the National Gallery of Canada, meaning that our cloud network now stretches across the entire country from Atlantic to Pacific.

AIP Milestone

We've passed a significant milestone this year: we now have over 1000 archival information packages (AIPs) processed in storage! This represents a huge amount of work to preserve specialized content at libraries and archives across the province (and now, across the country). Read more about one institution's archival use case in our newsletter spotlight: [Telling Her-Stories with Permafrost at the University of Ottawa](#).

Winding Down and Ramping Up

RACER

With the end-of-life date for the backend VDX software coming up in 2024, the work in RACER this year has mostly been focused on transition.

Other libraries and library consortia across Canada are also in transition, especially those that are moving from VDX to another interlibrary loan solution. We've been working closely with OCUL, with our colleagues in Quebec and across Canada, and with the major interlibrary loan system vendors, to test and troubleshoot communication between systems and advocate for greater interoperability.

This year has also seen the rise of Alma-to-Alma (A2A) resource sharing between the 19 Alma clients in OCUL, and several Canadian Alma subscribers outside of Ontario. As a growing number of resource-sharing requests at these institutions can be filled by other Alma subscribers, we've worked with several institutions to block their patrons from accessing RACER. Staff can still submit requests in RACER for items that cannot be fulfilled by other Alma partners, taking advantage of the wide network of partners that have been added over the course of two decades.

Project RAMP: Records Assessment and Migration Project

We're currently undergoing a migration project for SPOTDocs, the wiki instance that serves as a knowledge base for various services, committees and working groups across OCUL and Scholars Portal. This work has been prompted by an upcoming change to the licensing model and pricing structure for Confluence, which has served as the home of SPOTDocs since 2006. Given the long history of SPOTDocs, its extensive user community, and the significant amount of content that resides on the platform, [Project RAMP](#) presents a valuable opportunity to refresh, reframe, and renew how we create and share knowledge about our services, projects, and collaborative initiatives.

Demonstrating Value

Ongoing Excellence at Scholars Portal Journals

In November 2022, the Scholars Portal Journals team received the Ongoing Excellence award from the University of Toronto Libraries' annual Staff Team Appreciation & Recognition (STAR) Awards. Coming at the 20th anniversary of the Journals platform, this award recognizes the ongoing excellence of both aspects of our service – our focus on positive user experience and our commitment to long-term content preservation. The platform is designed to provide an accessible, bilingual interface for finding academic journal content essential for teaching, learning and research. Additionally, our commitment to long-term, large-scale preservation ensures that the articles on our platform will remain reliably valid and accessible into the future, maintaining the scholarly record for future generations.



Photo courtesy University of Toronto Libraries

Scholars Portal Journals by the numbers

66,534,967	articles	3,647,266	Open Access articles
26,381	journals	4,637,213	total 2022 downloads
12,000	new articles added per day (average)	539,468	student population served

Demonstrating Value

Maintaining our High-Quality Chat Service

To ensure the continued high quality of the Ask a Librarian service, the Virtual Reference Committee has embarked on several efforts to ensure the continued high quality of the chat service. In 2021, a Quality Assurance Working Group reviewed a random sample of chat transcripts for compliance with the Reference and User Services Association (RUSA) guidelines for reference performance. The group found the vast majority of chats met the standard, but identified some specific areas where we could offer more training.

Ask Transcript Review Results

Percentage of reviewed chats that met our service standards in each category

93%

approachability

94%

interest

89%

teaching

98%

answering

96%

wrapping up

64%

invitation to return

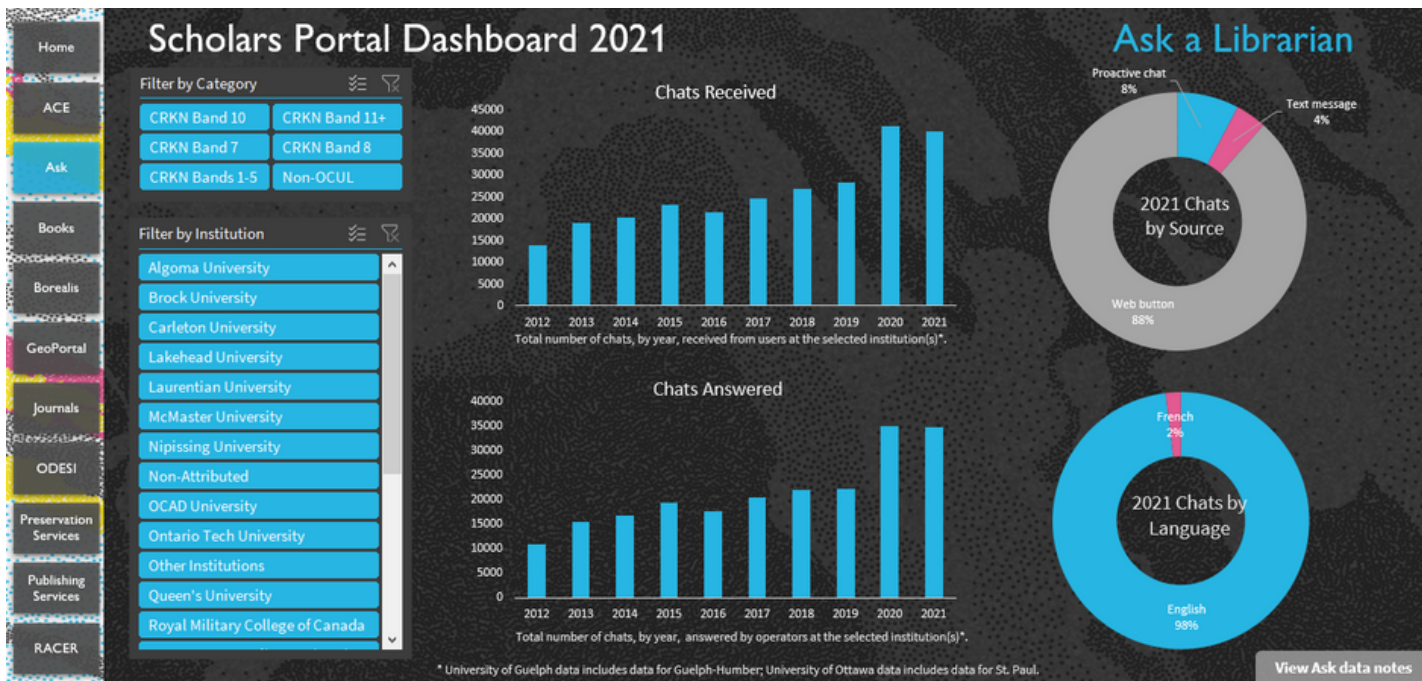
We also surveyed operators about their usage of our current chat software and identified several features that are underused, such as screen sharing. In order to increase usage of some of these features, keep operators up to date on best practices in chat, and emphasize points the Quality Assurance Working Group identified as requiring extra attention, we've introduced some new training opportunities.

In the fall, we held a webinar series with 10 sessions for both new and returning operators. We've also been sharing regular blog posts with Ask operators to share chat tips and tricks.

Demonstrating Value

New Scholars Portal Usage Dashboard

This year, we piloted a new dashboard to visualize usage of Scholars Portal services across OCUL and over many years.



Rather than simply looking at usage statistics for one institution, the new dashboard gives OCUL members a complete picture of the use of Scholars Portal services, including usage by non-OCUL subscribers and public usage of Open Access content. This holistic view of Scholars Portal helps underscore the impact of our services to the nearly half-million students across OCUL, and many others beyond the consortium's membership.

New & Expanding Partnerships



borealis

The Canadian Dataverse Repository
Le dépôt Dataverse canadien

In June 2022, Scholars Portal Dataverse became Borealis, the Canadian Dataverse Repository. The new name evokes connections to the Canadian landscape and reflects the growth into a national service used by more than 60 academic libraries and research institutions across Canada, and governed by the regional library consortia. [Read more in our press release.](#)

We are very pleased to have partnered with Compute Ontario on two exciting projects over the past year: the [georeferencing of historical maps](#) (see GeoPortal on page 4) and the [migration of Odesi data into Borealis and development of a new Odesi search site](#) (see Odesi on page 5).

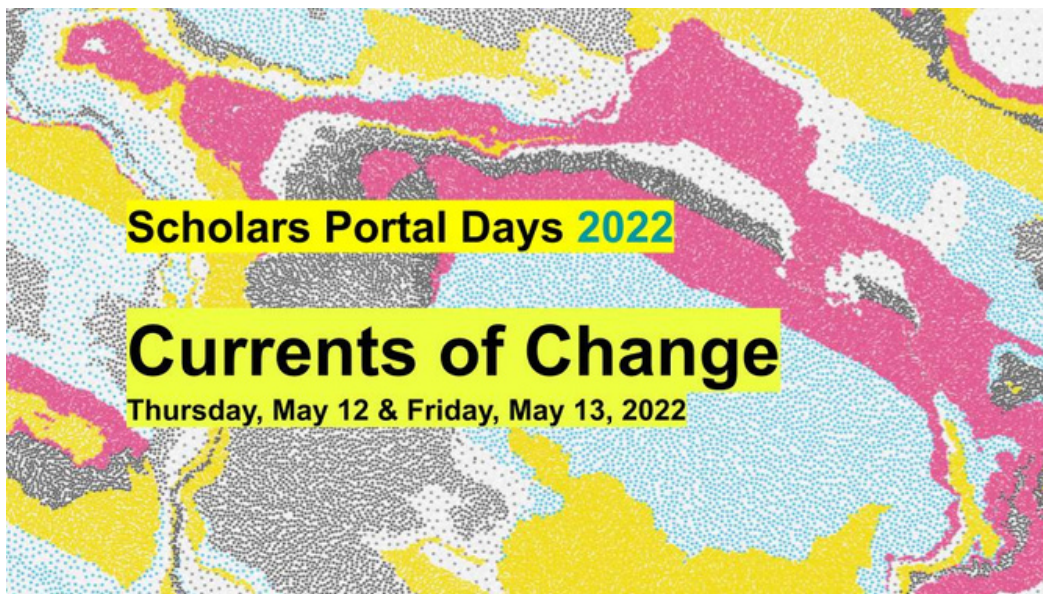


Canadian Research
Knowledge Network

Réseau canadien
de documentation
pour la recherche

We've always enjoyed a positive collaborative relationship with CRKN, most notably with the agreement offering access to Canadian University Presses to all CRKN members. Now that relationship has deepened. In fall 2022, CRKN voted to adopt the governance of the Scholars Portal Journals Trustworthy Digital Repository. A three-year transition period will begin in the 2023-24 academic year.

Scholars Portal Days 2022: Currents of Change



In May 2022, we held a successful virtual event for Scholars Portal Days. Because of its online format, we could invite attendees from outside of the OCUL membership to attend and view parts of the event relevant to them. A number of our services, including ACE, Books, Odesi, and OLRC, have subscribers or participants outside of OCUL.

The keynote speaker, Leslie Weir, Librarian and Archivist of Canada and one of the original founders of Scholars Portal, spoke about the early days of Scholars Portal and the collaboration across OCUL that made it happen.

For the first time, we offered a portion of programming in French. "Scholars Portal Day: en Français!" had a small but very engaged audience, and we hope to support our bilingual institutions with future French-language events going forward.

[The full event is available on YouTube.](#) Scholars Portal Days 2023 will be held on May 4-5, 2023.

Staffing Update

New Staff

Niranjan Bhimavarapu, Systems Administrator - Devops

Nana Boateng, Programmer/Analyst

Julia Gilmore, Digital Projects Librarian

Hafsah Hujaleh, Early Career Resident in Digital Preservation

Anugra Shah, GIS/Data Programmer/Analyst

Julie Shi, Digital Preservation Librarian

Farewells

Yuriy Czoli

Amy Greenberg, now with OCUL

Grant Hurley, now with the University of Toronto