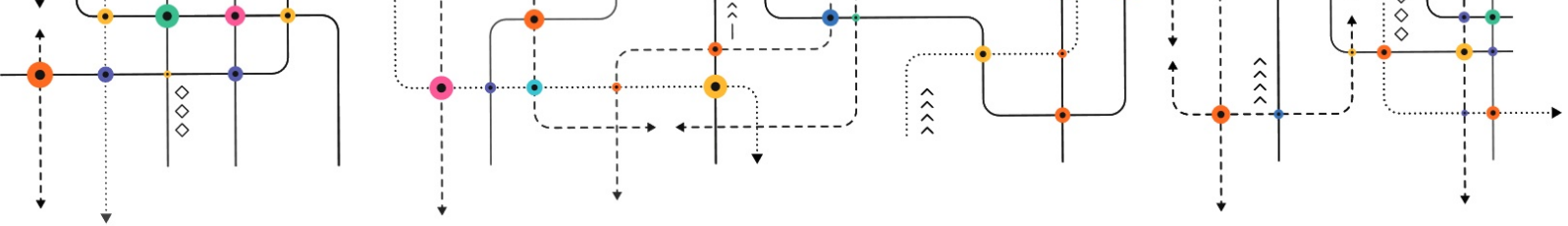


# Scholars Portal

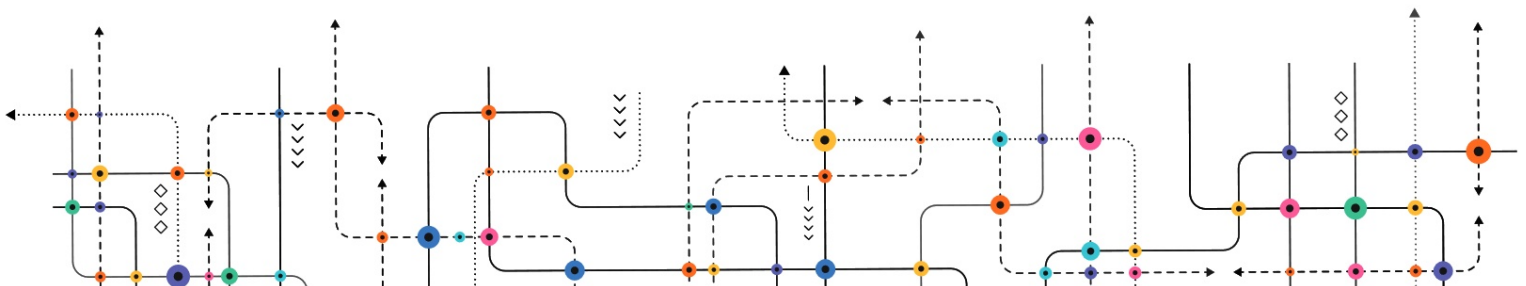
Report to the OCUL Directors

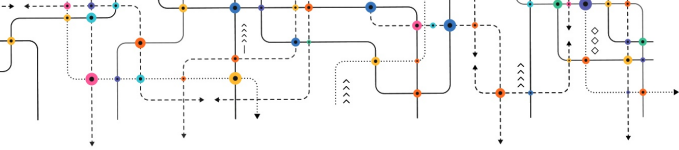
2023/2024



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## ○ Message from SPOD



As I approach the end of my first year as Chair of the Scholars Portal Operations & Development (SPOD) Committee, I reflect upon the close collaborations that have been a hallmark of this work within OCUL. Firstly, the outstanding Scholars Portal colleagues whose unwavering energy and dedication are integral to advancing initiatives with far reaching benefits within and beyond OCUL. The OCUL-SP community serves as a vital conduit, bringing forward thoughtful questions and ideas to inform further discussion and exploration. It has also been a privilege to work alongside my fellow SPOD members who have been unstinting of their time and thoughtful contributions. This dynamic ecosystem has resulted in many pivotal achievements to celebrate as we reflect on some of the highlights of the past year and look forward to the year ahead.

OCUL-SP, Scholars Portal, and SPOD have all closely followed the work of the Artificial Intelligence/Machine Learning Task Force, participating in the Hackfest hosted by McMaster (with hands-on exploration of the Whisper AI tool), joining the Community of Practice, and providing feedback on the Interim Report. The scope of possible applications is exciting; certainly the Whisper example poses great potential for transcription and captioning work.

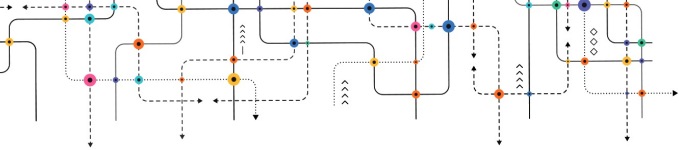
Following in that accessibility thread, last year's annual report announced the creation of a community-driven working group to seek input from all levels of OCUL member libraries on the efficacy of the ACE service. The working group took on an ambitious timeline, conducting an ACE coordinator survey, a quality check of ACE content, and an assessment of comparator platforms. SPOD looks forward to implementing the working group's recommendations and growing this valuable service to its full potential.

Originally stemming from OCUL-SP discussions, the shared repository infrastructure pilot has grown from the germ of an idea to a named project! Scholaris is still in the development stages, but Scholars Portal staff are working with two pilot institutions to implement DSpace software, while the Canadian Association of Research Libraries (CARL) takes the lead on developing a community of practice and collaborative governance model. As one of the pilot libraries, Ontario Tech is very excited to partner with Scholars Portal on the development of a new national service, building a new model of collaboration from the ground up.

These highlights only begin to capture the scope of Scholars Portal, OCUL-SP, and SPOD discussions and work this year. Coming from a smaller OCUL institution, I can attest that Scholars Portal's collaboratively-run services and shared infrastructure are extremely beneficial. These hosting services allow us to more optimally direct our limited human resources so that we can realize the greatest impact for our community. Scholaris, ACE, and AI applications are all things we are able to offer to our users, even during times of fiscal restraint, by working collaboratively and pooling our resources to support common interests.

I will close by expressing my appreciation and thanks for the many accomplishments of such talented individuals – the results of those collaborative efforts are reflected in the rest of this report.

Sincerely,  
Catherine Davidson,  
University Librarian, Ontario Tech University  
Chair, Scholars Portal Operations and Development Committee



## ○ Message from Scholars Portal



As another busy year comes to a close, I am proud to look back at the work from Scholars Portal in 2023-2024 and to share these highlights with you.

We are approaching the end of a time of transition at Scholars Portal. In the past year we have seen long-term projects come to fruition, solidified exciting new partnerships, and developed our leadership team. As Director, I'm thrilled to announce that Jacqueline Whyte Appleby and Harpinder Singh have accepted positions as Associate Directors of Scholars Portal.

Building capacity within our team and across OCUL institutions is more critical than ever as we navigate budget restrictions and increasingly limited resources, and we appreciate the role that a strong and supportive team plays in making the work that we do possible. With this in mind, I hope you will join me in reflecting on a handful of the incredible accomplishments we have seen at Scholars Portal this past year.

In 2023-2024, many of our long-term projects began to wrap up. We relaunched Odesi, the Project RAMP team successfully migrated SPOTDocs from Confluence to XWiki, and at the time of writing this message we are entering the final weeks of RACER – one of Scholars Portal's longest running services. These are significant infrastructural changes, both internally as a team and for our members who participate in these services. We are grateful for your support and enthusiasm throughout these transitions.

As we sunset older services and move on from past projects, we free up capacity to take on new initiatives and to move forward on long-standing obstacles. The Scholars GeoPortal redevelopment has begun, and work is now underway for a national shared repository service in collaboration with OCUL, CARL, and the University of Toronto Libraries (UTL).

We are also taking the plunge into the complex and ever-evolving landscape of Artificial Intelligence and Machine Learning in libraries. The interim report from the OCUL Task Force on Machine Learning and AI, as well as discussions and innovations from the AI/ML Community of Practice, have been instrumental in our early explorations for how we can mindfully, strategically, and sustainably integrate AI into our services.

Our theme for Scholars Portal Days 2024 was Collaborative Intelligence, with the intent to highlight both the potential of AI developments in libraries and our continued investment in collaborative work. This report is structured around the various forms of collaboration that underlie our services and infrastructure. Our resources are not unlimited. Our budgets are tight and there are challenges ahead of us, but the strong relationships that we have built allow us to think flexibly and creatively about how we can accomplish our goals. Our collective commitment to leveraging shared knowledge, insights, and skills as information and technology professionals is what makes Scholars Portal successful.

Thank you for working with us.

Sincerely,  
Kate Davis  
Director, Scholars Portal



## COLLABORATIVE INFRASTRUCTURE

At its core, Permafrost is a highly collaborative service, with partnership built directly into the service model. From a collaborative learning approach to onboarding and community consultations calls, knowledge sharing and relationship-building have informed the structure and delivery of the Permafrost service from the beginning. Since launching in 2018, the Permafrost community has grown rapidly, both provincially and nationally across Canada. This past year, we welcomed four new member institutions.

Throughout the onboarding process, the Permafrost team and member institutions work together to understand institutional context and collection needs, with a focus on how to adapt the Permafrost toolset to meet local priorities. These contexts and conversations inform critical structural decisions like naming conventions, preferred file and metadata formats, and developing workflows.

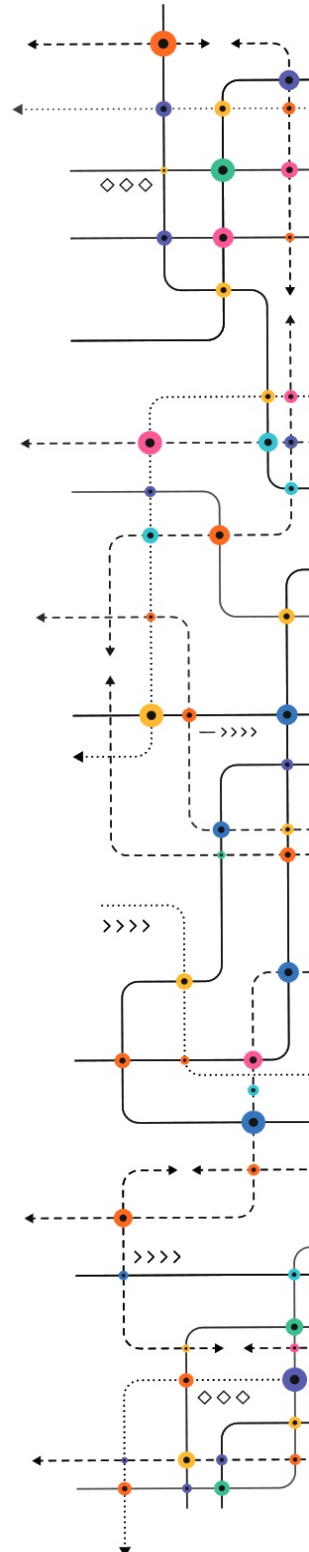
Workflows and metadata also took priority in the Permafrost community calls this past year. The Permafrost team worked closely with members of the Systems team to investigate and test a new metadata import feature, allowing users to include XML-formatted metadata in their packages to be incorporated into the final METS records for their archival packages. This new feature – which was introduced in v.1.14.1 of Archivematica following an upgrade in November – was rolled out in April of this year.

Digital preservation is work done by people. Over the past year, the Permafrost team has worked hard to build a resourceful community network across participating institutions, organizing community calls and hosting drop-in office hours. Fostering space for community consultation from the earliest stages allows for better understanding about upcoming projects, the thought processes behind them, and how the Permafrost team can best support members throughout the preservation process. Community conversations promote knowledge sharing and community-building among members and can help to identify areas where more testing, documentation, or discussion is needed.

### Five Years of Permafrost!

We're thrilled to celebrate the 5th anniversary of Permafrost with a vibrant and ever-expanding network of digital preservation experts.

As of the end of this fiscal year there are 3,308 archival packages (5.85TB) being preserved by the Permafrost community.





## SPOTlight! Julie Shi & Jenna Lemay

Julie is the Digital Preservation Librarian at Scholars Portal and the service lead for Permafrost. Jenna is the Permafrost Preservation Assistant with Scholars Portal, based out of Algoma University. This past year, Julie and Jenna hosted seven Permafrost community calls with over sixty participants. They also introduced monthly working office hours with six attendees across seven sessions. In addition to open discussions, community calls this year included lightning talks from participating schools, webinars on Archivematica software, and a presentation from the First Nations Information Governance Centre (FNIGC).



In addition to Permafrost, Julie is the service lead for the Ontario Library Research Cloud (OLRC), and Jenna is the Digital Archives Technician with Algoma University.

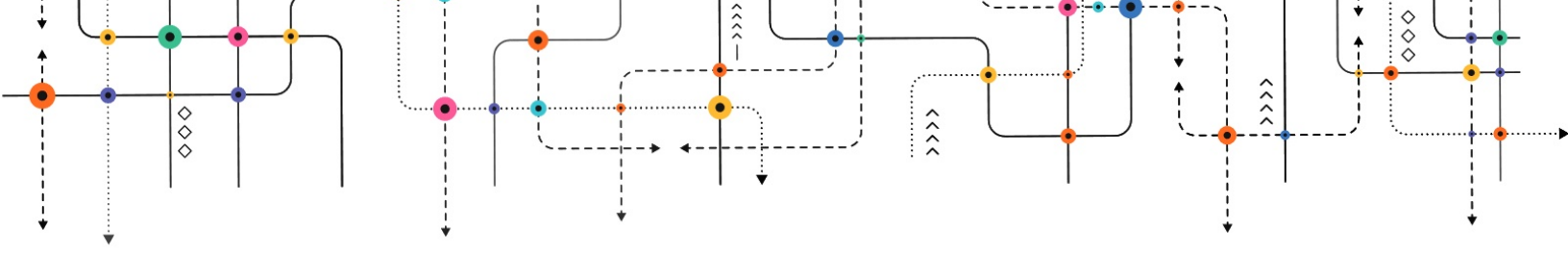
# The Ontario Library Research Cloud

The Ontario Library Research Cloud (OLRC) is a service that we offer to member libraries, providing secure and affordable cloud storage, and it is also an important part of Scholars Portal's own back-end storage.

About 36% of the OLRC's disk space, 183 Terabytes, is used for back-end storage of Scholars Portal services, with another 4% for Borealis. The OLRC is the backbone for our major content services, Scholars Portal Books and Scholars Portal Journals, and an important part of our overall preservation strategy.

The work that the Systems team does to maintain the OLRC infrastructure may not be very visible, but it truly provides the foundational support for all of our much more visible collaborations.





# Cyber Security

Cyber security and data security are always important, but this year several high-profile breaches at libraries and other public institutions have led us all to take it more seriously than ever. At Scholars Portal, we are working collaboratively to ensure our data and our systems are safe and protected.

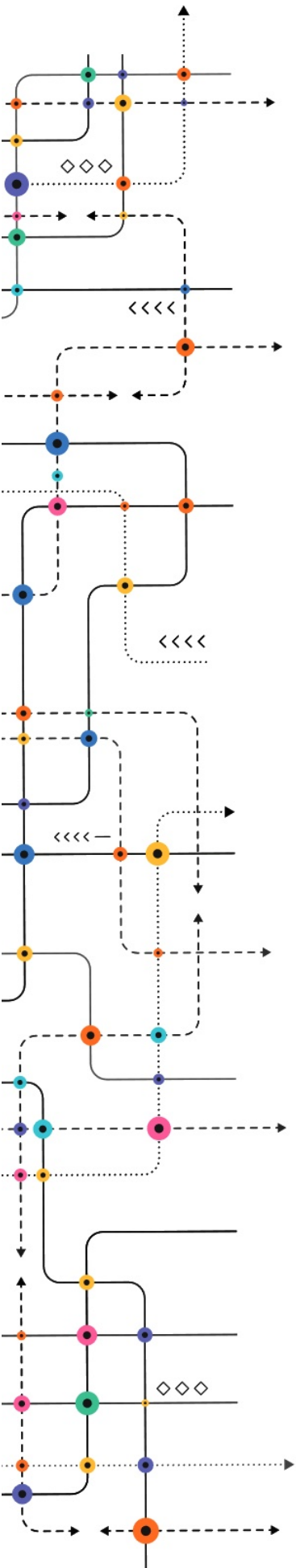
Scholars Portal's servers are located in the University of Toronto Libraries (UTL) data centre, along with the servers for Borealis and UTL's own digital assets. The Scholars Portal Systems Team, Borealis Team, and UTL IT Services work very closely together in the management and protection of these systems. In the past year, there has also been increasing collaboration with the central IT services at the University of Toronto, spurring us to complete an updated digital inventory, risk assessment, and risk mitigation plan for our data centre.



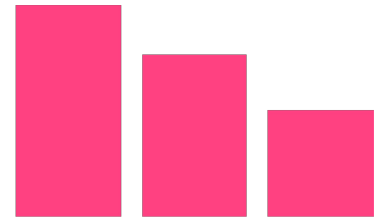
University of Toronto Libraries Data Centre

We have already made several changes, including installing and running enhanced cyber security enterprise software. UTL-based Scholars Portal staff are also participating in UTL's new cyberawareness and cyber security training.

The Borealis team has begun an analysis of security risks, with specific recommendations about policies, workflows, and systems to improve. This work will also benefit Scholars Portal and UTL because of the shared hardware infrastructure.



# Re-launching Odesi



In October 2023, we officially relaunched Odesi. With the former back-end repository, Nesstar, now end-of-life, the new Odesi is fully integrated with Borealis and has a re-developed front-end search catalogue.

The relaunched Odesi facilitates discovery and access with built-in features including a fully bilingual search interface, browsing by topic, full-text and variable searching with Odesi's Data Documentation Initiative (DDI) metadata, dataset DOIs for data citation, and file downloading.

Leveraging Borealis connected tools, Odesi's curation and deposit workflows are now integrated into the Data Curation Tool to enhance data files and variable metadata, as well as in Data Explorer to support user exploration, analysis, and reuse of data.

With the move to Borealis, much of the data in Odesi is now open, aligning with our support for the FAIR principles and open data licenses. As a result, Odesi metrics are now provided openly through Borealis for users to access at any time, rather than relying on institutional metrics updates from Scholars Portal.

The Odesi team has worked incredibly hard over the past couple of years to make this migration as secure, efficient, and user-friendly as possible. The work has not stopped here. As with any service, we are consistently working to maintain and improve the infrastructure.

We are grateful for the support and feedback from the Odesi community over the course of the migration, and we are in the process of implementing this feedback. Work is underway to develop the new features in the Data Explorer and Curation Tool, and Odesi users can look forward to enhanced data analysis and curation options in the near future.





# Redeveloping the Scholars GeoPortal

With the Odesi migration successfully wrapping up, we are eagerly looking ahead to the next system redevelopment on the horizon. The GeoPortal project team has begun to assess and prototype designs for the new front-end search catalogue and map interface of the GeoPortal, as well as strategies for the migration of all data and metadata into a new system.

In March 2024, OCUL released a call for nominations for the GeoPortal Redevelopment Project Working Group. This group will consist of eight members from across OCUL with a combination of experience in library GIS training, maps, geospatial metadata, ESRI products like ArcGIS Pro, web accessibility and user experience testing. The group is set to begin their work in summer 2024.

One of the primary goals for the project working group is the production of a more user-friendly interface for data discovery, access, and download, with this interface built in-house, integrated with ArcGIS Portal, and supporting accessibility principles.

Scholars Portal staff are already working to create and test early prototypes, including a front-end prototype for the new GeoPortal site using modern frameworks and design patterns from both ArcGIS and open-source repositories. These prototyping tools are a valuable resource for project planning, allowing us to test-drive new approaches in a controlled environment and predict their effectiveness and impact on user experience and functionality before making final decisions.

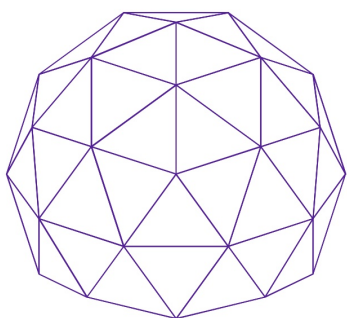
As we dive deeper into this work, the combined experience, direction, and skills of the GeoPortal Redevelopment Project Working Group and the project team at Scholars Portal will guide the process of developing the updated and improved GeoPortal infrastructure for libraries and researchers to use in the coming years. Regular updates and communications will be shared over the next year regarding migration of collections and prototype design.

## SPOTlight! Anugra Shah

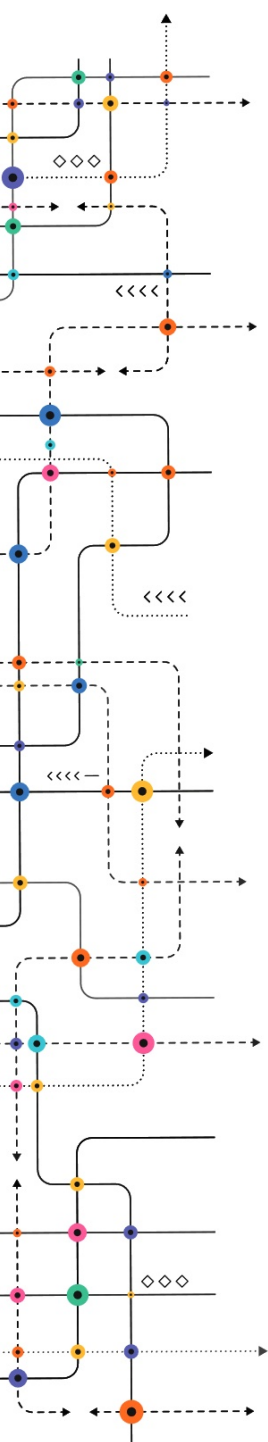


Anugra Shah is a Programmer/Analyst at Scholars Portal working with the Scholars GeoPortal. He regularly works with GeoPortal collections, like the Historical Topographic Maps, as well as GeoPortal infrastructure. Anugra recently designed and demoed a prototype for a new front end interface of the GeoPortal, which we are using as a test model for the GeoPortal Redevelopment Project.

For World GIS Days 2023 back in November, Anugra developed a time lapse animation of the Port Lands of Toronto using a number of maps from the Historical Topographic Maps Collection to show changes to this area over time.



# scholaris



2024 marks the ten-year anniversary of Scholars Portal's publishing services: Open Journals Systems (OJS) and Open Monograph Press (OMP). As we continue to work with OCUL schools to support local scholarly publishing, we are thrilled to be working with CARL, OCUL, and UTL to build Scholaris, a national shared repository service.

Institutional repositories play a vital role in the academic research environment by advancing scholarship and fostering Open Access to research. As a national shared repository service, Scholaris will facilitate knowledge sharing, foster collaboration, and increase the discoverability and impact of Canadian research excellence.

Our years of experience with OJS and OMP have shown us how impactful it can be for scholarly communications librarians when we can alleviate some of the technical workload involved in supporting scholarly publishing. We understand the importance of partnering with institutional staff to collaboratively support their local publishing endeavors from faculty publications to the Student Journals Forum, as highlighted by Scholarly Communications Librarians at Western in our [January newsletter](#).

As a service with collaborative governance, Scholaris both supports and is guided by the institutional repository community. Local repository managers can contribute to and benefit from shared expertise, join expert groups, and receive support from a national network of scholarly communication experts, librarians, developers, and fellow repository managers.

With a homegrown, national community developing Scholaris as a shared service, we can leverage capacity, knowledge, skill sets, and resources from across the country through community calls, shared documentation, bilingual service support, and more. These practices have been successfully implemented into existing Scholars Portal service models, including the Permafrost community calls and the [Odesi Markt! Program](#).



## SPOTlight! Mohana Sarmiento & Julia Gilmore

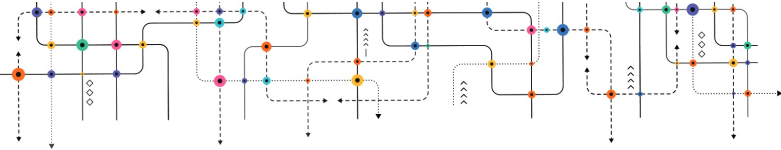
Mohana Sarmiento is a Systems Administrator - Devops and member of the Systems Team at Scholars Portal. Julia Gilmore is the Digital Project Librarian with the Web and Publishing Services Team. Together, Mohana and Julia are the service leads for Scholars Portal's newest project: Scholaris.



Over the past few months, Mohana, Julia and other systems team members have been working to write the configuration management code that is serving as the base for bringing up infrastructure for Scholaris. They have begun onboarding two pilot schools and are preparing to move forward with the first cohort of an early adopters program this summer.

## Developing a Shared Repository Service: Timeline

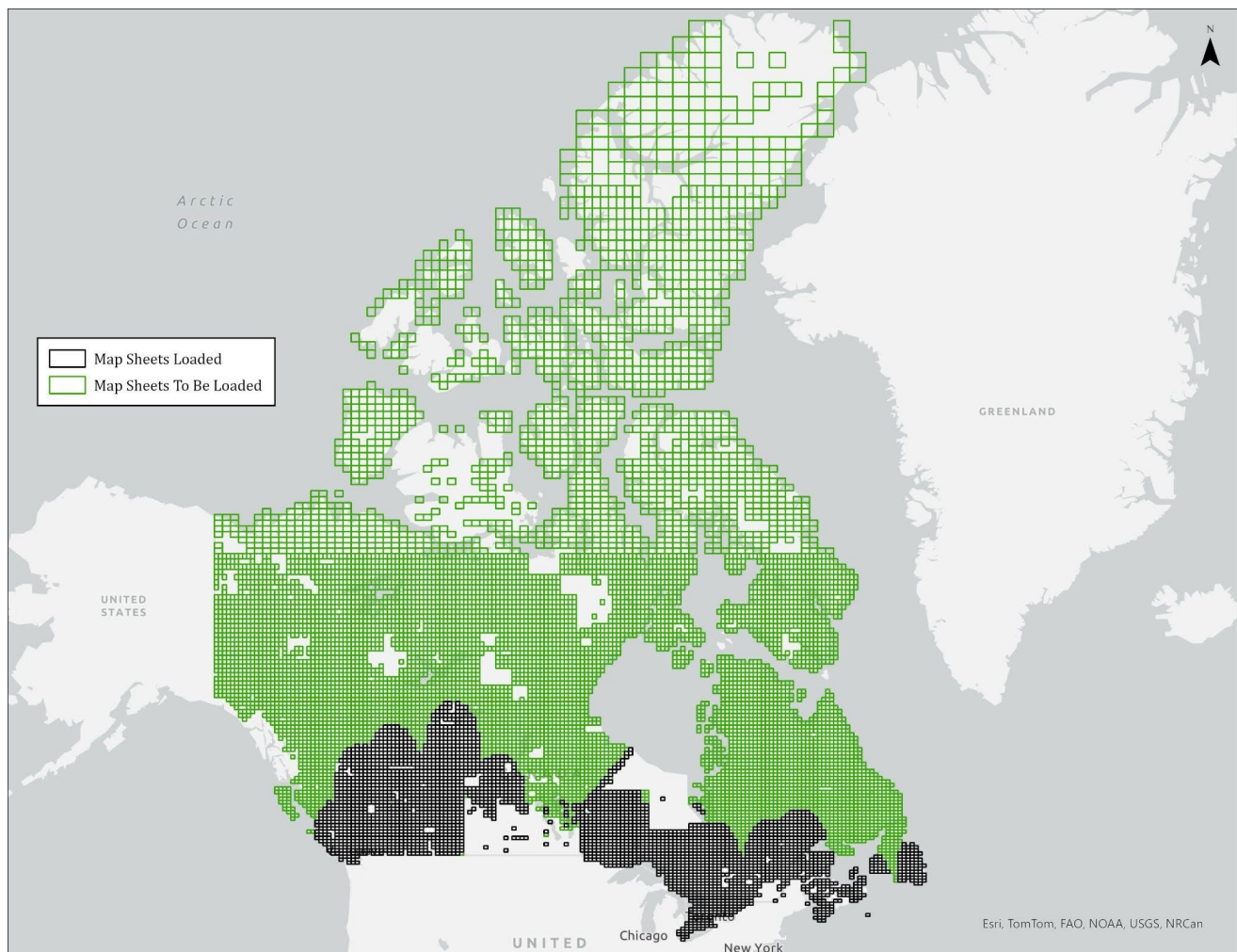




## The GeoPortal & Historical Maps

As we break ground on the GeoPortal Redevelopment Project, we are fortunate to hold such unique, valuable collections on behalf of the GIS library and geospatial data community. For the past several years, the GeoPortal's Historical Topographic maps have been among our most popular collections. These maps are available to researchers through the GeoPortal as a result of both OCUL and national collaborations.

Our Historical Topographic Maps collections come from two different digitization initiatives. The Historical Topographic Map Digitization Project, an initiative of the OCUL Geo Community, provides access to over 1,000 high-resolution map scans at the 1:63,360 and 1:25,000 scale, covering the province of Ontario for the period of the early to mid 20th century. The Historical National Topographic System (NTS) 1:50,000 scale series, inventoried by libraries across Canada and digitized by McGill University Libraries with support from Canadiana.org, and later georeferenced by the University of Toronto Libraries, includes Canada-wide coverage of more than 15,000 digitized and georeferenced maps for the mid-late 20th century period.





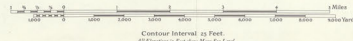
Revised and Reissued by the Geographical Section, General Staff  
DEPARTMENT OF NATIONAL DEFENCE  
Revised 1955, and reissued 1956 by S. G. L. P.  
Protrude 317

REFERENCE

Blue	Highways	Blue	Water
Black	Other roads	Blue	Swampy areas
Black	Other roads	Blue	Swampy areas
Black	Other roads	Blue	Swampy areas
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Black	Other roads	Blue	Swampy areas
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Black	Other roads	Blue	Swampy areas
Black	Other roads	Blue	Swampy areas

### GOLDEN LAKE ONTARIO

Scale 1 mile to 1 inch or 1:63,360



NOTE: The grid system, first used in 1911, provides a useful means of reference in the field. It is based on a rectangular system of lines, the intersections of which are marked with the letters of the alphabet. The letters are arranged in a grid, the letters of the alphabet being used in the order in which they appear in the alphabet. The letters are arranged in a grid, the letters of the alphabet being used in the order in which they appear in the alphabet.

REFERENCE

Blue	Highways	Blue	Water
Black	Other roads	Blue	Swampy areas
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Black	Other roads	Blue	Swampy areas

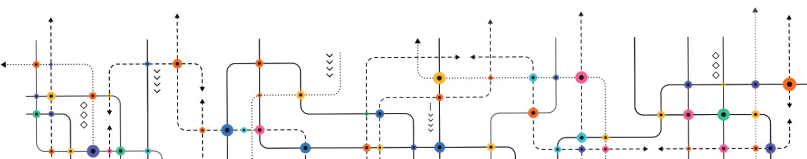


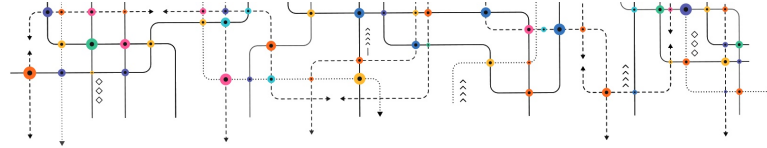
Copyright in this map is retained by the Geographical Section, Department of National Defence, Ottawa, P.O. Box 110.

(1957) 31 F 11

We are excited to share that we are now entering the final project phase for the NTS 1:50,000 series, as we have received the last batch of map sheets in this collection from the georeferencing vendor and they are ready for loading to the GeoPortal. These additional sheets will further expand our historical maps coverage beyond Ontario and provide maps for urban and rural areas of the rest of Canada, including the North.

This final stage has come at an opportune time, allowing the GeoPortal team to use this collection to test loading new metadata and data services on a testing instance of ESRI Portal for the Redevelopment Project. Through this testing process, the team will prioritize functionality in the new system, ensuring that researchers will benefit from modern infrastructure and tools for search, index browse, map display, and download of these unique historical map collections.





# Scholars Portal Books & Scholars Portal Journals

## Supporting Unique Collections

With over 900,000 texts on the Scholars Portal Books platform, we have a huge variety of materials. Some of our most unique collections come from small publishers. Building relationships with small presses is critical to developing our collections in a way that represents the broad scope of the Canadian publishing landscape, from poetry to historical government documents. Over the past year, we've collaborated with a number of small presses to support access and preservation.

In the fall of 2023, we worked with the Azrieli Foundation to load their Holocaust Survivor Memoirs collection to the Books platform, with over 70 titles now available. The publisher has agreed to make the collection available to all Scholars Portal Books subscribers by request, at no cost.

We are also pleased to now host over ten years of content from *The Eastern Door*, a community-based weekly newspaper serving the Kahnawake community since 1992. *The Eastern Door* is the first newspaper to be available on the Scholars Portal Books platform, marking the opportunity for us to continue to expand the kind of content hosted on the Books platform.

In 2022, the newspaper reached out to the University of Toronto Libraries about an opportunity for wider access and dissemination of the paper, as well as a reliable technical infrastructure for hosting and preservation. A partnership was formed whereby UTL would conduct the digitization work for back issues of the newspaper and Scholars Portal Books would host and preserve the content. The first 10 years of digitally available content has been loaded to the Books platform, with plans to digitize and load the full run of the newspaper over time. We just received the 2023 content and will be continuing to load new content going forward.

**THE EASTERN DOOR**  
 Celebrating 30 years!  
 KANIEN'KEHA:KA NA'KON:KE RONTEHNNHOHANONHNHA  
 KAHNAWAKE MOHAWK TERRITORY • www.easterndoor.com  
 Vol. 31 No. 22 Friday, June 3, 2022 \$2.00

## Children speak out on Bill 96

**MARCUS BANKUTI**  
 The Eastern Door

Outside, a downpour. Rain dampened a "day of action" against Bill 96 at Karohimashonha Ts'i Itonerhwasstahkwa, but the school community's indignation could not be extinguished by a little rain.

The Friday, May 27 event was moved to the gymnasium, where the school's staff and some 230 students assembled for the first time since the pandemic struck more than two years ago.

"I think it made it much more powerful," said Katsi'tashaw Spilcer, a counsellor at the elementary school, which is home to a Kanien'kha immersion program.

Youth have led the community's opposition to the new French-language law in recent weeks. However, the day of action stood out for giving the community's youngest a chance to have their say.

"It's very inspiring to watch the kids light up and be able to use their voice and actually be heard," said Spilcer. "I think it promoted exactly what we're looking for, a reminder of why our school exists and what we're fighting for and all the wonderful immersion teachers put in."

Not only do Karohimashonha-aged students substantially face the brunt of the law as they grow up, but they are the ones on whom the revitalization of Kanien'kha most depends.

Fittingly, the school's students boasted Kanien'kha posters they made to protest the law. Some even rose to make speeches in Kanien'kha in an effort to rally the other students.

"There was nobody else speaking, so I decided I wanted to speak," said nine-year-old Itoneshari LaLache, a fourth-grade student.

At first, she felt nervous, but she quickly steadied herself as she addressed her peers and teachers in her own words.

"We're Mohawk people. (Lagash) can't take away our language," she said of her motivation. "It's okay to learn French, but it's not our whole lives to learn French."

Her mother, Sondra Karahk-wenah-wi-Cross, is a third-grade teacher at the school, but she said the initiative to speak came from her daughter alone.

"I feel I've done my job as a parent to instill those values into her," said Cross, who tries her best to speak Kanien'kha at home despite not considering herself fluent.

"We're really proud they chose these words themselves," she said.

LaLache was not the only fourth-grade student to stand up and speak. Her friend Iehwas-ahura'ta Gilbert, 10, also had something to say.

"We need to address the situation, that they can't take away our language and they can't force us to learn French," explained Gilbert.

She, too, felt shy as she began; she was shaking and could feel her heart beating as she spoke, but these feelings subsided as she became absorbed in her message.

"Bill 96 is very important to talk about," she said.

While Cross acknowledged it can be challenging to speak to young children about a complex issue like Bill 96, she believes it is important not to shy away from communicating to the community's youth the history and circumstances facing Kanien'kha'kehronon in a colonial Quebec.

"We have to be blunt about things. We've been through a lot. That's why we're a resilient people," she said.

"They need to know these honest truths about us and our people and our paths."

She spoke about trying to balance educating children on the importance of putting Kanien'kha first with trying not to focus them on learning French. The need to take a stand against further encroachment from colonial languages can make this difficult, however.

According to Robin Delaronde, director of the Kahnawake Education Centre (KEC), the message is about choice.

"They speak English. We teach French," Delaronde said. "We want them to know that all languages are important, but their language is one that's dying, one that needs extra attention."

In addition to making French more central to business and public services in Quebec, Bill 96 puts enrollment caps on English CEGEPs and dictates that students who attend the institutions must pass an additional three French courses.

Local educators fear these measures could compromise student success and could undermine Kanien'kha due to an increased need for French proficiency.

Delaronde has vowed that KEC will protect efforts in local schools to fortify Kanien'kha among students. She pointed out that the day of action was also observed with songs and posters at Kaneri School, albeit in smaller groups.

"We affirm with them that their language is Kanien'kha, and we have to work hard in whatever way we can to revitalize and learn that language. That is what makes us who we are as Okauchewehwe people," said Delaronde.

In addition to the young speakers, the Karohimashonha

*Continued on page 7*

**We are LOOKING FOR ELDERS to share their stories so they can be printed in The Eastern Door in Kanien'kha.**  
 Our goal is to tell your stories and history and also to preserve and teach our language.  
 Call 450-635-0550 or email reception@easterndoor.com.

In addition to newspaper content, the Books platform also hosts an extensive collection of historical government documents in partnership with OCUL. The government documents collection includes over 45,000 items from various government bodies at both the provincial and federal level. We acquire these documents from partnerships with government organizations, in-house harvesting, and collaborations with the OCUL Government Information Community, who have supported digitization of a number of our subcollections over the past few years. With the aim of increasing access and discoverability of government documentation, subscribers to Scholars Portal Books can now search, read, and download materials critical to the Ontario public record in one platform with a unified search interface.

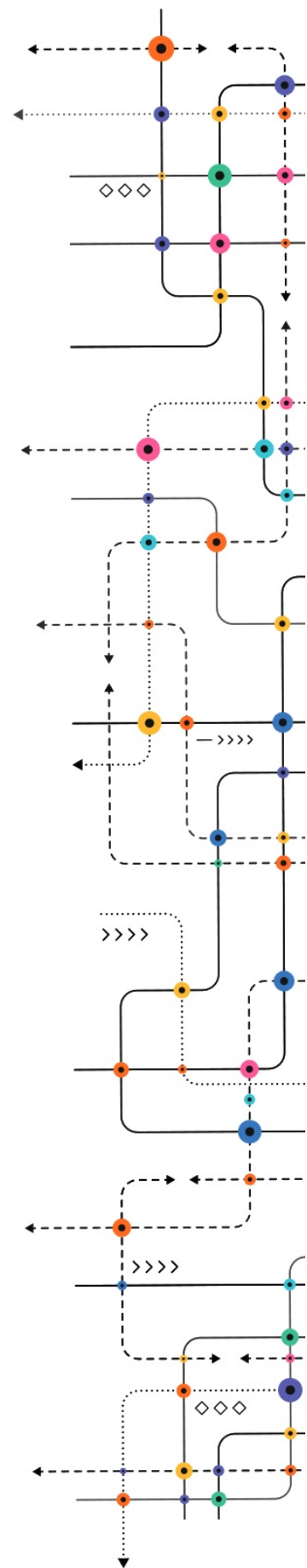
The Scholars Portal Journals platform, meanwhile, is home to over 67 million academic journal articles. The majority of these articles come from major scholarly publishers, but we have started to add more special collections to the Journals platform, as well. We archive around 200 journals published by Canadian university libraries on their OJS instances.

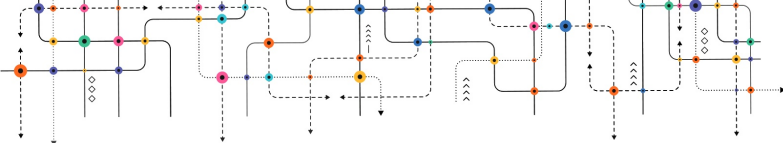
This year, we ingested the North Korean Journal, *Külloja*, a representative political and theoretical magazine of the Central Committee of the Workers Party of Korea. The comprehensive archive for this journal, dating back to 1946, is now hosted on the Journals platform and preserved in the Trustworthy Digital Repository (TDR). The Journals team also recently agreed to become the new archival host of BioLine International, a database of Open Access biosciences journals from developing countries, supported by the University of Toronto at Scarborough. We have received the BioLine data and will be working to convert the original database into a format we can load to the Journals platform throughout 2024.

## Preservation & Partnership

For larger, commercial presses, Scholars Portal Journals and Scholars Portal Books may be a secondary access point for users – after the publisher’s site. In the case of small, independent presses, however, this is not always an option. In collaborative collecting partnerships, Scholars Portal is the main – and sometimes only – online access point for these materials. With these documents hosted on our platforms, we can provide secure storage, preservation, and access to a wider community for historical record and future research.

This community is widening already. Last year, we began work to move governance of Scholars Portal Journals and its Trustworthy Digital Repository status to CRKN, bringing access to our preserved collections to a national audience. Work on the transition is already underway at CRKN. Scholars Portal has started work on an updated administrative interface, similar to the Admintool for Scholars Portal Books, which will allow OCUL and eventually CRKN members to access real-time entitlement information and title lists. The new interface will also bring our COUNTER usage reports into a more modern interface that will be built for compliance with the new COUNTER 5.1. This new tool will also facilitate the work required by Scholars Portal staff to add the entitlements for all CRKN members to the Journals platform and to enable a modern entitlement management experience going forward.





## 21 Years of RACER: Saying Goodbye & Moving Forward

For nearly 21 years, RACER has provided rapid access to collections across OCUL via electronic requesting. It launched in 2003 as one of Scholars Portal's first ever services and has been the backbone of interlibrary loan for OCUL ever since. With the end-of-life point of the back-end VDX software nearing, RACER will be sunsetting in 2024.

Resource sharing is one of the longest-standing forms of collaboration between libraries. It allows us to offer our users access to a larger collection than any one institution could manage on its own. But this process, which is so core to our library operations, relies on a complex web of policies and agreements, software programs with many moving parts and configuration options, standardized electronic communication protocols, shipping logistics, and above all people who know how to navigate this landscape. Moving from one resource sharing software to another is neither a simple nor a straightforward process.

In 2023-24, the RACER Seamless Wind-down and Transition Team (RACER SWAT), made up of staff from Scholars Portal and OCUL, worked to manage the transition from RACER to Alma Resource Sharing and complete the transition of resource sharing in OCUL from a Scholars Portal service to foundational building block of the Collaborative Futures vision. This has required significant communication within OCUL as well as with our resource sharing partners outside of OCUL, who need to be kept up to date with developments that impact our ability to interlend with them.

"You did a good job. Of all my 55 years in Interlibrary Loans, I cannot remember software that lasted this long."

--Bonnie Brooks, Queen's

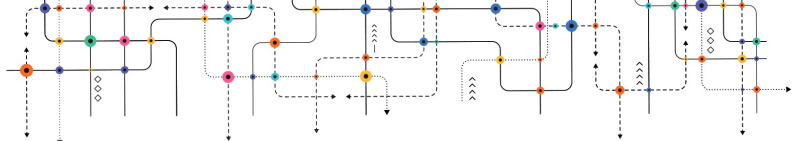
"A fond farewell to RACER. You brought ease and time saving to my ILL world."

--Anne Beaupre, Algoma

"I think the excitement is something that is hard to recreate in this world of instant access to everything on a smartphone, but it really had an impact, and seemed like the beginning of a lot of great Scholars Portal initiatives that make Ontario universities stand out in this regard."

--Anonymous RACER User

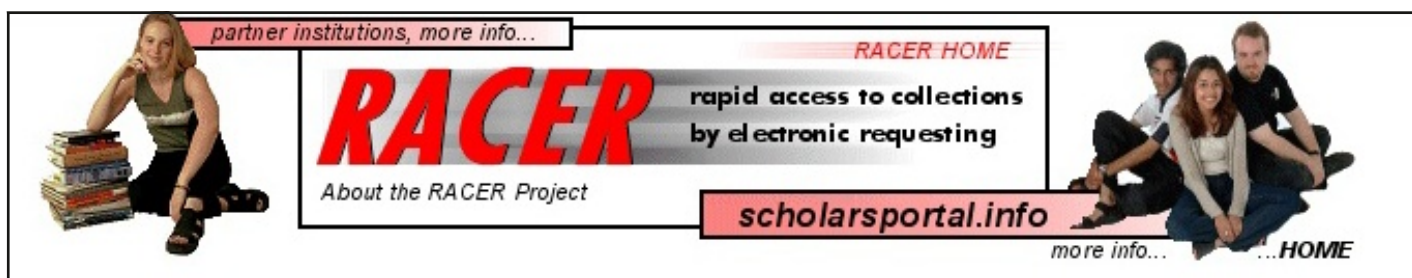




The monthly drop-in calls to talk about updates on RACER sunsetting regularly reach over 50 resource sharing, access services, and LSP staff across OCUL to hear about new configuration changes to Alma Resource Sharing, status of technical developments in Alma, and communications from our resource sharing partners outside of OCUL. To help facilitate information sharing, the RACER Transition Team also created a new collaborative space on SPOTdocs called the [Resource Sharing Hub](#), bringing together documentation about RACER and Alma, OCUL and Collaborative Futures resource sharing agreements and policies, contact details for resource sharing staff, tracking for technical support and development issues, FAQs, and more. The work and the uncertainty around the transition process have, ironically, brought the Resource Sharing community in OCUL even closer together than they were before.

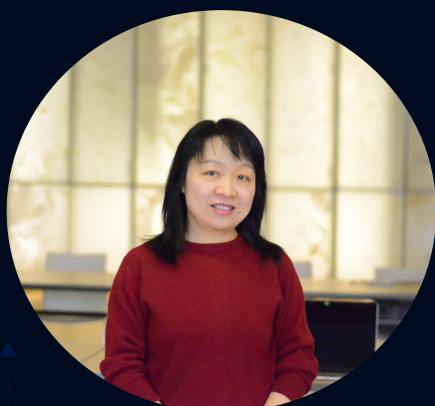
RACER officially sunsets on June 1, 2024, after nearly 21 years of faithful service and over six million requests filled.

Thank you, RACER, for everything.



RACER Home Page - 2003

## SPOTlight! Agnes Bai



Agnes Bai is a Systems and Web Analyst and a long time member of the RACER team. Agnes has been the primary support staff for RACER for years, helping OCUL libraries fix problems and bugs, adding new partner libraries from around the world to the RACER system, and maintaining the usage reports needed for CARL statistics reporting, Netting Out calculations, and more.

During this year of ILL transition, we took a phased approach to stopping our usage of different parts of RACER. Agnes tested and implemented all the configuration changes needed to block RACER usage in as smooth a manner as possible.

# Collaborating through ACE



The Accessible Content ePortal (ACE) provides a digitization service and shared repository of digitized texts for students, faculty, and staff at Ontario universities and colleges who have print disabilities. We are constantly seeking to improve access to these collections, and to implement ways for local staff to contribute to the shared repository.

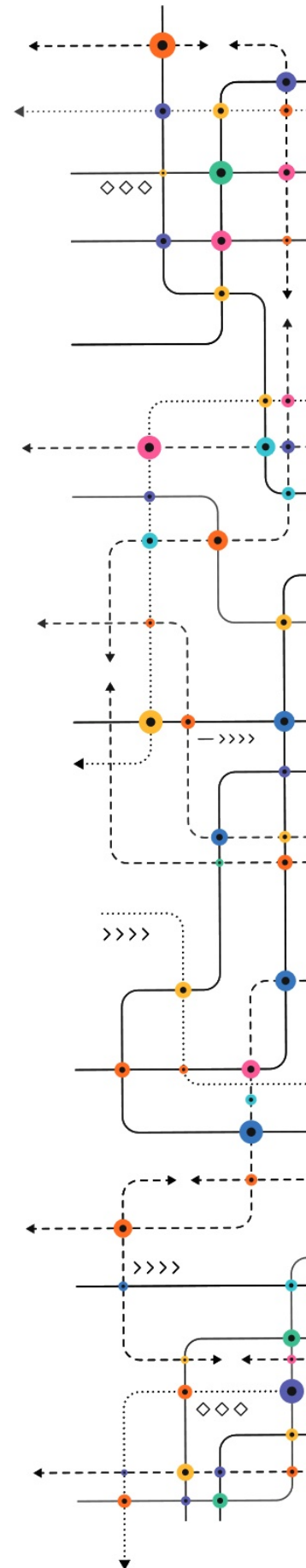
## Table of Contents Tool

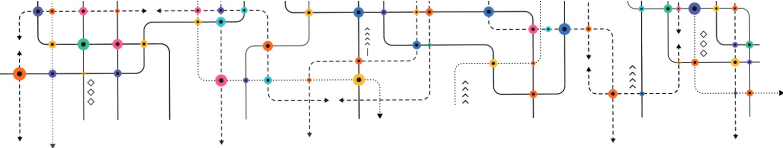
While ACE books are scanned as a single PDF, they often have an auto-generated table of contents (TOC) with page numbers that allow users to download individual chapters or sections of a book. As scans are quite large, and many assistive technologies do extensive processing on files, working on smaller sections of a book can save users a lot of time.

However, the TOC is only as useful as it is accurate, and the structure and layout of an actual Table of Contents page in a book varies greatly, making it a challenge to generate good quality metadata. This is especially true of academic texts with multilevel TOCs (such as part, chapter, and section headings listed in the TOC). Up to 30% of our TOCs are incorrect to the point of being unusable. Recently, Scholars Portal developed a tool that would allow both Scholars Portal and member library staff to make updates and corrections to the TOC right on the platform so that they can be quickly corrected and then made available to all future users.

## Education Materials Made Accessible (EMMA)

The Educational Materials Made Accessible (EMMA) project brings together alternate format text repositories and accessibility staff at academic institutions to reduce duplication of effort. EMMA recently implemented their own new in-house-developed authentication system, which allows each OCUL school to have a manager account. This manager account can create and manage all institutional accounts discreetly. EMMA has now invited ACE coordinators to bulk upload their remediated texts to facilitate sharing across EMMA members.





# COLLABORATIVE ASSESSMENT

## ACE Assessment

Over the past few years, as assessment has become an increasingly large part of OCUL’s strategic vision, we have been developing a service assessment framework for Scholars Portal services. This flexible framework will allow SPOD to quickly spin up an assessment working group, give them a mandate to assess a specific service, and provide recommendations or other deliverables like environmental scans or statements of value.

The first service to go through this framework, and in the process test the framework itself, is the Accessible Content ePortal (ACE). In summer 2023, SPOD called up a working group consisting of representatives from the ACE coordinators, the OCUL Accessibility Community, SPOD and its OCUL-SP subcommittee, Scholars Portal staff, and an end user of the ACE service. This group has been working to understand ACE’s strengths as a service and opportunities for its development, its place in the alternate format landscape, and potential barriers to the use of the service. A full report including recommendations for steps that Scholars Portal and OCUL can take to enhance the ACE service and bring it in line with new AODA requirements is under review at the spring 2024 Directors meeting. We expect that the report will become public, and we will begin to enact some of its recommendations in summer 2024.

## Project RAMP

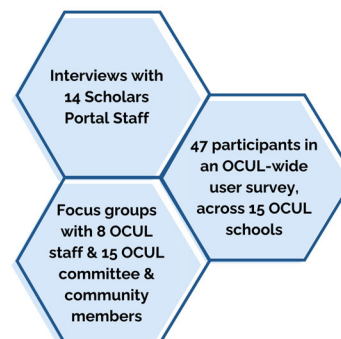
In February, the Project RAMP Team successfully migrated SPOTDocs from Confluence to its new home on XWiki. More than twenty years of use as the Scholars Portal and OCUL knowledge base led to the accumulation of over 7,000 pages and nearly 19,000 attachments. This extensive amount of content stored on SPOTDocs posed challenges for information retrieval, retention planning, and preservation.

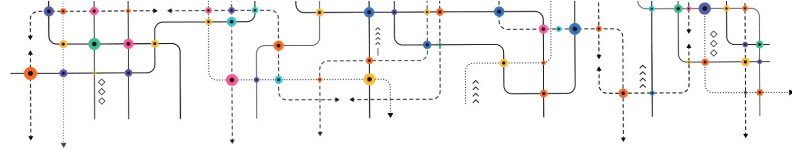
In addition to the selection and design of a new cost-effective platform for SPOTDocs, the migration project provided an opportunity to address the content accumulation, refresh the information architecture, and provide guidance and support for consistent content management practices. This multi-facted work supports the over-arching goal of meeting users’ needs of finding, creating, and managing information and addresses the recommendation for improved information flow across the organization from the 2022 OCUL Governance Review.

### RAMP by the Numbers

Category	Pre-Migration	Post-Migration
Active Users	1150	850
User Group	110	25
Wiki Spaces	120	39
Content Size (zipped)	18 GB	7 GB

### Community Consultation





To achieve these goals, the Project RAMP Team conducted community consultations with Scholars Portal and OCUL staff, OCUL governance groups, and the SPOTDocs user community. These consultations helped to identify functional requirements and preferences for a new platform, using a systematic approach to completing a full-scale content evaluation of the existing SPOTDocs.

The RAMP Team created workflows and tracking systems for reviewing content, developed OCUL Content Management Guidelines to provide a standardized approach to governance records, and constructed organizational Nextcloud file structures for longer-term storage of legacy content. With these frameworks in place, the RAMP Team worked collaboratively with Scholars Portal teams, OCUL staff, and OCUL governance groups to complete a coordinated review of their respective areas on SPOTDocs and identify which content should be migrated, moved to Nextcloud, or left behind on Confluence.

In addition to the content clean-up, the information architecture of the new platform was designed and customized to provide additional layers of navigation and attend to feedback from the SPOTDocs community. The move to XWiki sees Scholars Portal and OCUL hosting open-source wiki software for the first time in the organization's history. In addition to meeting our functional requirements, XWiki's regular release schedule and active developer community points to a bright future for SPOTDocs as a highly collaborative documentation space.

As we move forward with the new SPOTDocs on XWiki, content review will occur on a more consistent basis with scheduled transfers of legacy content to organizational Nextcloud repositories. This work to collaboratively assess our information workflows is ongoing and multi-faceted, since different services, projects, and communities have unique information needs. The information collected and the frameworks created during this assessment process provide a roadmap for secure and reliable content management strategies to support our ongoing collaborations.

## SPOTlight!

### Carlos McGregor Muro



Carlos McGregor Muro is a Senior Systems Administrator with the Scholars Portal Systems Team, and he is the XWiki technical service lead for Project RAMP. Throughout the migration phase of the project, Carlos provided technical guidance and support across both platforms. His knowledge and expertise ensured the successful and efficient migration of identified SPOTDocs content, user accounts, and version history from Confluence to XWiki.

Beyond the migration itself, Carlos performs dedicated monitoring and maintenance of the new platform, conducting regular upgrades, troubleshooting, and performance improvements.

# Artificial Intelligence & Machine Learning in OCUL Libraries

The information and technology landscape continues to shift rapidly, and libraries have had to adapt equally quickly. As AI and Machine Learning (AIML) technologies continue to evolve and develop at an increasing rate, this past year was a pivotal time for academic libraries to take the plunge.

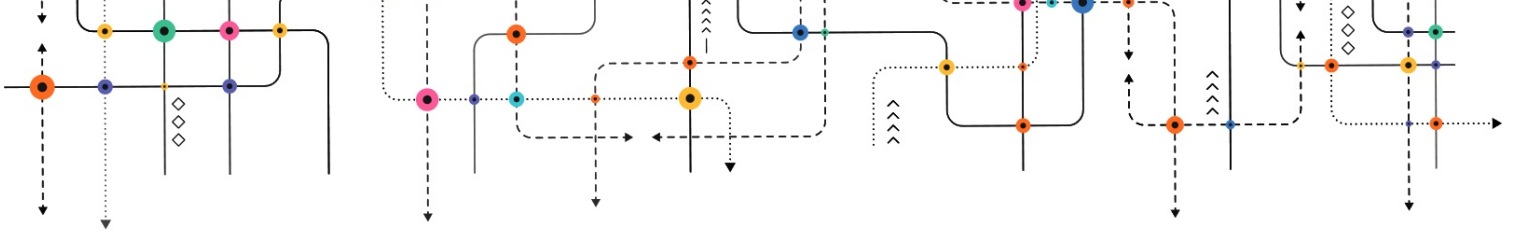
In March, the OCUL Task Force on Machine Learning released an interim report, highlighting a number of key areas for potential AIML integrations in libraries. We are glad to be involved in these early, strategic conversations and plans, with representation on the OCUL Task Force and as hosts of the Mattermost instance for the AIML Community of Practice, which includes over 350 library staff from across Canada.

In February, the OCUL AIML Task Force coordinated a Hackfest - hosted by McMaster - as an opportunity to explore use cases and implementations of AI tools in libraries while building community and capacity. The Hackfest focused on the OpenAI open source transcription tool, Whisper, and had more than thirty participants. The Whisper Hackfest provided an opportunity for representatives from the Scholars Portal team to collaborate with staff from across OCUL libraries, and to think creatively about how we can bring AI tools into our workflows and services. Ideas discussed at the Hackfest were included as recommended projects outlined in the AIML Task Force Interim Report. We look forward to future Hackfests to continue these collaborative explorations.

In line with our theme for Scholars Portal Days 2024, Collaborative Intelligence, we have always relied on collaboration, between people and between institutions, in order to create and support technologies and projects greater than what one person can do alone. This year we gathered virtually to leverage our knowledge, insights, and skills as information professionals to discuss developments and potential integrations of AIML in libraries. With a panel discussion on the academic library community's apprehensions and anticipations about AIML, as well as a number of lightning talks on specific tools and use cases, the event served as an incubator for ideas, projects, and partnerships across Scholars Portal services and member libraries.



We may still be feeling a mix of anticipation and apprehension at the road ahead, but we are looking forward to continuing conversations and piloting projects for AIML technologies and tools to improve existing workflows, open new doors for our services, and support OCUL institutions, both locally and as a wider community.



# Outreach & Communications

## Social Media & Mailing Lists

This past year brought new challenges to communication strategies in libraries, primarily a changing social media landscape. As Twitter has now transitioned to X, many features and functionalities are no longer available without a paid subscription. Amidst changes to the algorithm and increased concerns about misinformation, many library workers have left the platform, prompting us to explore alternatives.

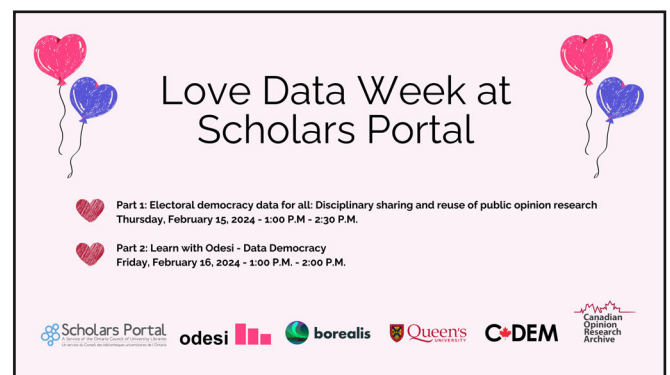
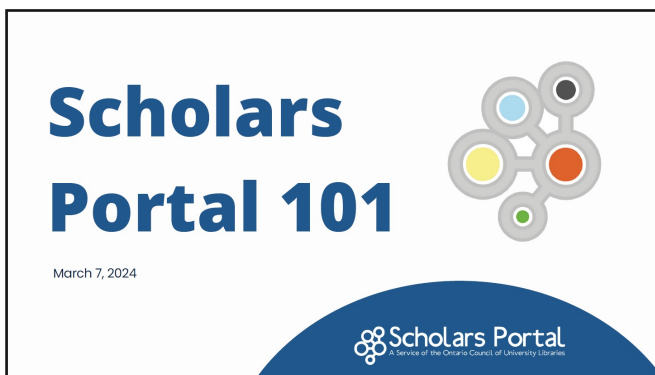
While we continue to share information [on X](#) for the meantime, we have broadened the scope of our communication networks in order to ensure that we reach as wide an audience as possible during this transition. Scholars Portal is now also active on [Mastodon](#) and [Bluesky](#).

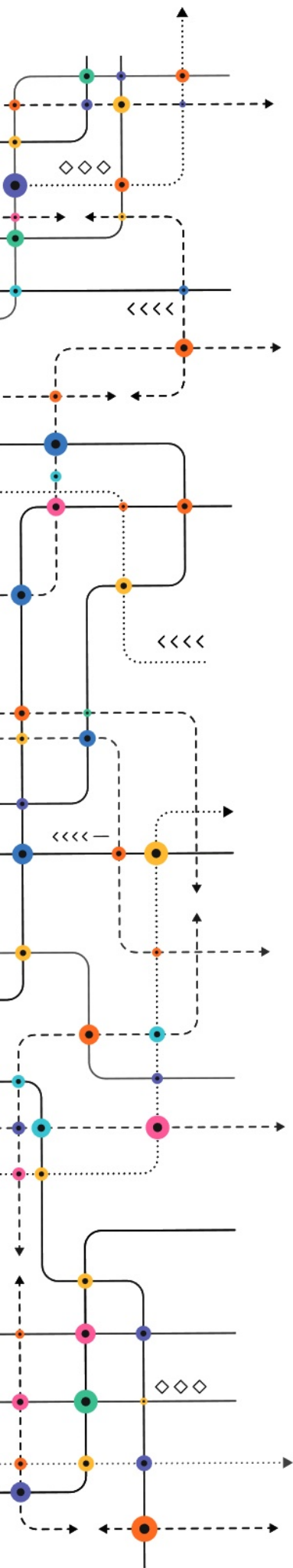
We also continue to make use of our listservs and have increased our long-form communications shared through these lists. We plan to continue exploring the shifting library communications landscape in the upcoming year and assess our various communication channels in order to make decisions about the most effective way forward.

## Webinars & Events

For Love Data Week 2024, Scholars Portal hosted a two part webinar series about democratic data and public opinion data in Odesi, in collaboration with Borealis, Queen's University, the Canadian Opinion Research Archive (CORA), and the Consortium on Electoral Democracy (C-DEM).

We brought back the Scholars Portal 101 webinar this year in early 2024, after a short break. With 150 attendees, this was an extremely successful webinar, and we plan to offer it on an annual basis to support new and long-term OCUL library staff in their work with Scholars Portal services.





# Staffing Update

## New Staff:

Gabby Crowley, Client Services Librarian

Sarah Reeser, GIS Analyst

## Leadership Update:

Kate Davis, Director

Jacqueline Whyte Appleby, Associate Director

Harpinder Singh, Associate Director Systems and Technical Operations

## Farewells

Kaitlin Newson, now with ACENET