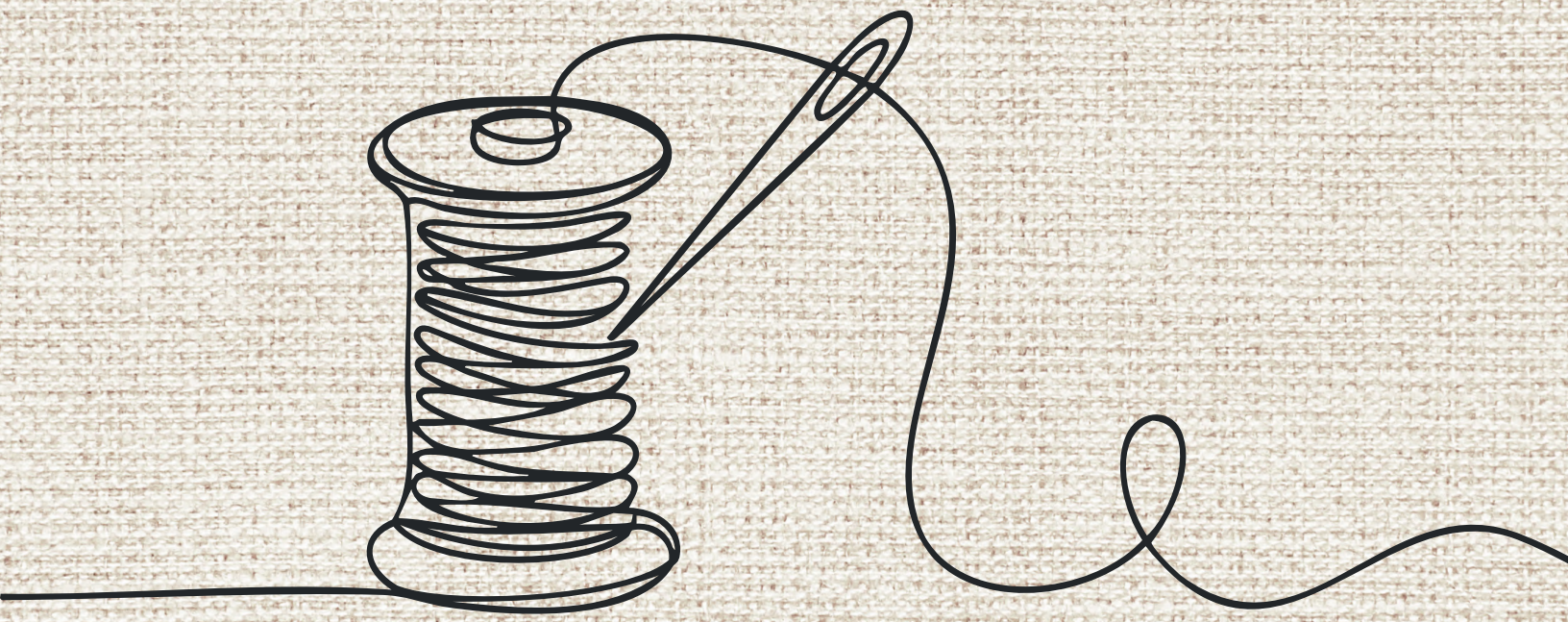
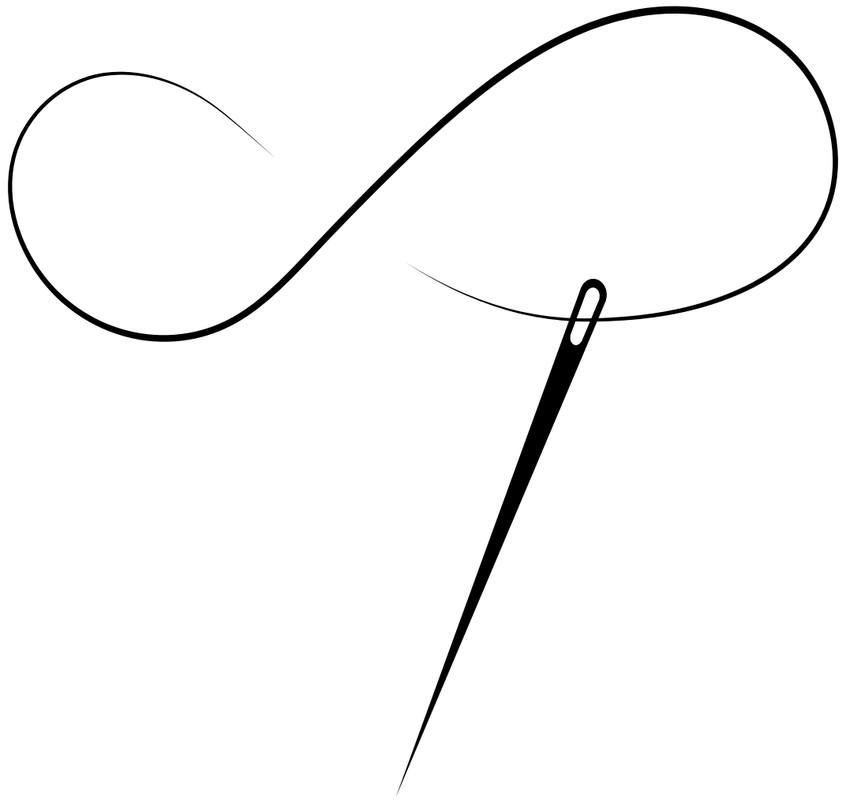
Scholars Portal



Annual Report to the OCUL Directors

2025-2026



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A Message from SPOD

Reflecting back on the work of the Scholars Portal Operations and Development (SPOD) Committee this past year, I am very proud of what we have accomplished. This year we set out with renewed direction from the OCUL Strategic Plan for 2025-2028, a common thread connecting us as library workers and weaving together the strong fabric of our profession. During this period, SPOD has worked closely with Scholars Portal on several important initiatives.

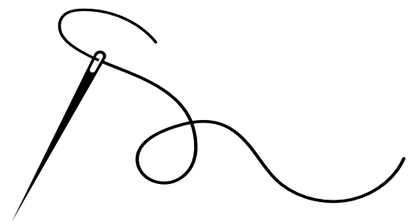
Together we began a regularization process for Ask the Library, the newly renamed virtual reference service, which involved reviewing staffing and cost models and a fair distribution of hours for greater stability of the service. The second implementation of the Scholars Portal Assessment Framework produced an evaluation of the Odesi MarkIt Program, a distributed data markup program supported by a student staffing model. I encourage you to look at the recommendations to strengthen the program in the final assessment report. The Scholars GeoPortal Redevelopment Project is an ambitious initiative to renew the GeoPortal's underlying infrastructure so that we can meet the growing expectations of OCUL's community of learners. SPOD continues to provide oversight on project timelines and resources.

SPOD's purpose is to establish priorities, identify opportunities and provide direction related to Scholars Portal services. As SPOD chair, I am continually impressed at the scale of collaborative work accomplished by so many OCUL library colleagues, grateful to the dedicated members of SPOD, and humbled by the impressive work carried out by the talented team at Scholars Portal. Thank you for all of your work.

La mission de SPOD est d'établir des priorités, de cerner des occasions et d'orienter les services de Scholars Portal. En tant que présidente de SPOD, je suis constamment impressionnée par l'ampleur du travail de collaboration qu'accomplissent tant de collègues des bibliothèques membres de l'OCUL. Je suis reconnaissante envers les membres de SPOD pour leur dévouement et j'admire profondément le travail remarquable de la talentueuse équipe de Scholars Portal. Merci à toutes et à tous pour votre excellent travail.

I look forward to continuing our work together. Au plaisir de continuer à travailler ensemble.

Talia Chung (elle/la | she/her)
Bibliothécaire en chef et doyenne des bibliothèques / University Librarian and Dean of Libraries
Chair / Présidente, Scholars Portal Operations and Development Committee



A Message from Scholars Portal

We have come to the end of another year, and I'm proud to celebrate everything the Scholars Portal team has achieved.

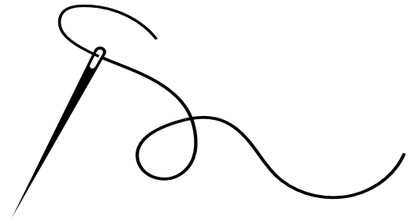
This is a challenging time for libraries as we navigate increasingly finite resources and a broadening scope of user needs. Amidst evolving trends in areas like Open Access, digital sovereignty, and artificial intelligence there is an underlying sense of urgency to adapt and innovate quickly. As we rise to meet these challenges, I find myself reflecting on Scholars Portal's unique position in academic libraries and how we can weave our way forward together.

At Scholars Portal we value the process equally to the end product, with the understanding that quality and intentionality support longevity. There is a necessary balance to maintenance and development, knowing when to prioritize patchwork and tailoring and when to cast on with something new. Scholars Portal Journals is our longest running service, now operating with national governance under CRKN. The Journals team's commitment this past year to metadata clean up and entitlements review has been instrumental to ensuring a smooth user experience for members within OCUL and now across Canada. Our Systems and Preservation Services teams have begun projects to provide increased storage capacity and security for the OLRC.

At the same time, we are growing alongside our colleagues and community needs. Over 20 schools are now live on Scholaris infrastructure. The new GeoPortal will leverage AI text extraction tools for enriched metadata and enhanced discovery of geospatial data collections. We are exploring a consortial audio to text processing pipeline using Whisper and Globus.

I encourage you all to take a moment to read this report in recognition of the hard work the Scholars Portal team has dedicated to our services and community over the past year. As we look to the year ahead, we remain committed to writing our own patterns, building locally, and working together as stewards for sustainable library futures.

Sincerely,



Kate Davis
Director, Scholars Portal

A Shared Tapestry of Resources:
Scholars Portal Journals

After a three-year transition period, Scholars Portal Journals is now a national service, governed by CRKN. CRKN is currently putting in place a new group, the Scholars Portal Journals Committee (SPJC), a standing committee of the Board that will provide direction and strategic oversight for the service. Over the next year, this group will come together, and we will onboard CRKN members to Scholars Portal Journals as licenses allow. In line with this transition, our team has built a new entitlements application for Scholars Portal Journals which will be available this spring. Using this new app, eresource staff will be able to view and verify their own collection and ISSN-level entitlements, as well as download title lists that match CRKN entitlements and knowledge-base provider collections. The application is currently being tested with a few schools, and we look forward to rolling it out nationally soon.

Just as important as what is changing is what isn't changing – the running stitch keeping things together through this transition. Scholars Portal Journals continues to be a service run by the Scholars Portal team, with staff and data housed at the University of Toronto Libraries. OCUL members will continue to receive the same level of support from the same support team.

As Scholars Portal Journals expands to serve users across Canada, our team has been working to ensure collections and entitlement records are as complete and up-to-date as possible. As part of this work, we've identified and loaded 1,806 missing journals from seven different publishers. This process has involved license research and matching, data cleanup from older CRKN and OCUL lists, and many extensive conversations with OCUL, CRKN, and vendors to ensure approval for previously held-back or missing content for delivery and local load. We have also been focused on remediation for data integrity issues, like cleaning up invalid and duplicate ISSNs, as well as journal integration and affiliation across title and publisher changes. These nitty-gritty projects have been very important in troubleshooting and finalizing our journal integration workflows, which in turn allow for cleaner entitlements records, Alma portfolios, and platform display. We have developed a new program that uses CRKN KBART files to update more than three thousand journal links to properly reflect publisher changes, ensuring each journal on our platform is correctly linked to the official journal website.

As a result of these extensive efforts over the past year, we have resolved and closed 87 per cent of all open data cleanup tickets. These improvements will benefit not only the OCUL community but the new, national Scholars Portal Journals readership as we welcome new institutions through this transition to CRKN governance.

SPOTlight: Qinqin Lin and Monika Kilic

Qinqin Lin is a Programmer with the Books and Journals Team at Scholars Portal.

Monika Kilic is the Metadata Production and Electronic Access Specialist with the Books and Journals Team.

Over the past year, Monika and Qinqin have been working on analyzing and resolving duplicate or missing Digital Object Identifier (DOI) issues in the Scholars Portal Journals database. These issues range from invalid DOIs, redirects, and duplicates, all of which can be significant barriers at the point of access and citation for users. Qinqin has been writing programs to query the DOI.org API to retrieve information about how DOIs are resolving. Monika has run this program across our entire database to gather data for analysis and cleanup, and she has also written python programs to parse the log files from this program. Fixing these DOI issues will mean that we have fewer duplicate articles loaded, we will be able to more accurately enrich our metadata from other sources, and we will be able to properly re-direct users to the publisher's webpages. As persistent identifiers like DOIs become increasingly valuable for long-term access and discovery, we're grateful to have Qinqin and Monika on our team to ensure our DOIs are in good shape for our users.

Writing our Own Patterns for the OLRC

Interest in and use of the Ontario Library Research Cloud (OLRC) has grown rapidly over the past few years, both through direct subscriptions and through connected services like Permafrost and Borealis. As a result, the current OLRC is close to storage capacity and we are in the process of expanding. With a continued focus on homegrown and locally hosted infrastructure, we are committed to building increased capacity within our existing service infrastructure to better support preservation.

A pilot infrastructure project is underway to increase OLRC storage capacity by 320TB to meet our community's anticipated needs for the next few years. The processes developed will directly inform our plans for a full hardware refresh in the coming years.

Alongside additional storage capacity, we are also conducting a series of upgrades of the OpenStack software and Ubuntu operating system to bring our OLRC infrastructure up to date and in line with enhanced security policies. Beginning with firmware upgrades for all OLRC servers and one software upgrade in December, work is planned for eight further upgrades in the coming year.

These projects represent our first in-place hardware and software updates in the live OLRC production environment. Previously, these upgrades were managed by building a new cluster and migrating stored data. Now, we look to upgrade within our existing environment with more streamlined and secure processes. This shift to an in-place approach will also lay the groundwork for more flexible and responsive maintenance and improvements for the OLRC moving forward.

SPOTlight: Meghan Xu

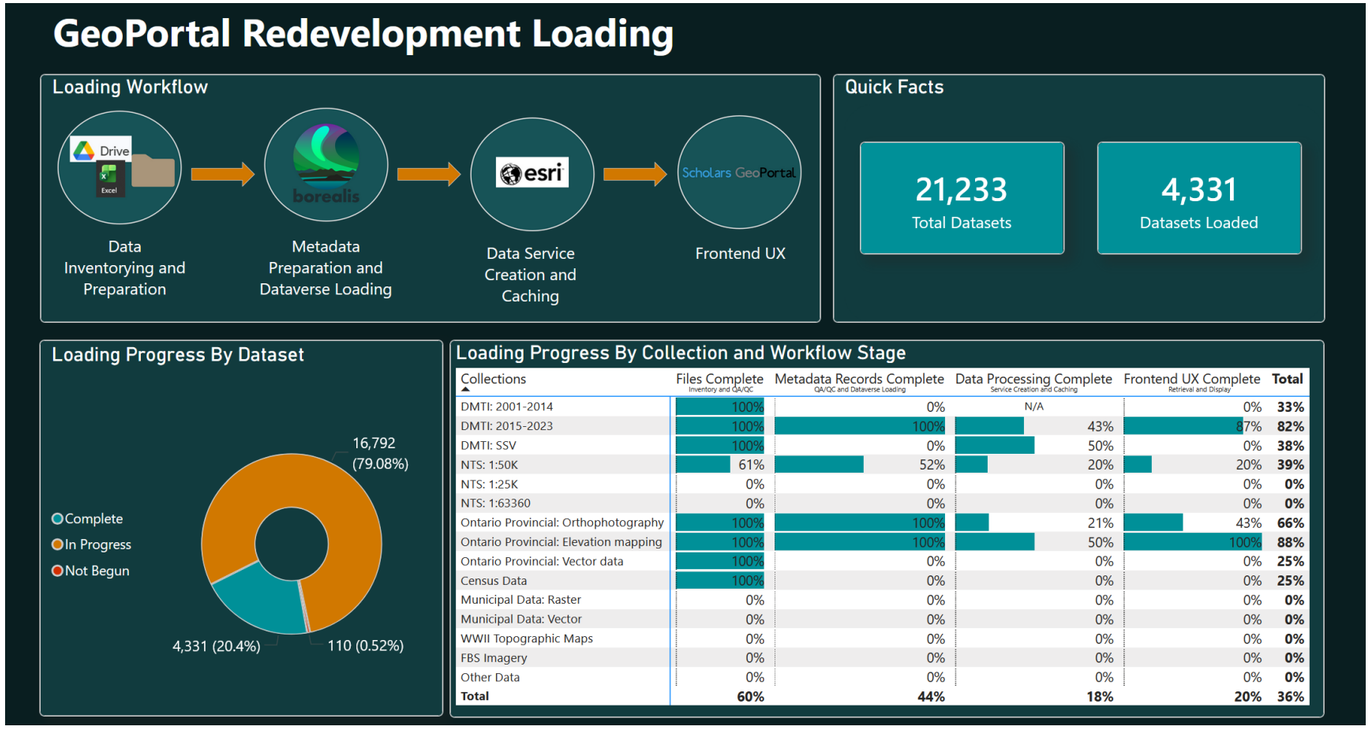
Meghan Xu is a Programmer/Analyst and key contributor to the development and maintenance of the OLRC. Her eagerness to learn and adopt new deployment patterns is evident in her contributions to the Chef cookbook for our OpenStack Swift upgrades and the development of GitLab CI pipelines that enable automated testing of service functionality and performance. Meghan's strong analytical skills and full-stack knowledge support the team's ability to adapt quickly to shifting requirements and evolving technical constraints. Her infrastructure-as-code (IaC) expertise makes her the clear leader of the OLRC's maintenance and development, improving reliability, reducing risk, and boosting the team's confidence. Maintaining and expanding the OLRC is a highly technical undertaking, and we're grateful to have Meghan's skillset and leadership guiding us.

Casting On:
A Fresh Start for the Scholars GeoPortal

We've been making steady progress on the GeoPortal Redevelopment this past year, stitching together the different pieces and seeing the project as a whole begin to take shape.

Last spring, we debuted wireframes for the new look and feel of the refreshed Scholars GeoPortal, highlighting features that would improve accessibility in navigation, discovery, search, and download. We were also in the early stages of testing new migration and loading workflows with our Historical Topographic Maps collections and working towards an internal Alpha test release. This past fall, the project team presented a successful Alpha test environment to the GeoPortal Redevelopment Working Group, and we are now working towards a Beta test release for community feedback later in 2026.

The project team has made significant progress in migrating collections and metadata to ArcGIS Portal and Dataverse for testing in the new GeoPortal infrastructure. To date, over 5,000 historical topographic maps from the NTS 1:50k series, 1,379 datasets for DMTI 2015-2023, and 81 raster datasets, including 45 mosaics of orthorectified aerial imagery of Ontario, have been migrated for testing. The team has been tracking our process across the workflow, and as of early April 2026 over 99 per cent of GeoPortal datasets are in the loading pipeline, ranging from in-process inventory review to fully visible on the development frontend.



Collections	Files Complete (Inventory and QA/QC)	Metadata Records Complete (QA/QC and Dataverse Loading)	Data Processing Complete (Service Creation and Caching)	Frontend UX Complete (Retrieval and Display)	Total
DMTI: 2001-2014	100%	0%	N/A	0%	**33%**
DMTI: 2015-2023	100%	100%	43%	87%	**82%**
DMTI: SSV	100%	0%	50%	0%	**38%**
NTS: 1:50K	61%	52%	20%	20%	**39%**
NTS: 1:25K	0%	0%	0%	0%	**0%**
NTS: 1:63360	0%	0%	0%	0%	**0%**
Ontario Provincial: Orthophotography	100%	100%	21%	43%	**66%**
Ontario Provincial: Elevation mapping	100%	100%	50%	100%	**88%**
Ontario Provincial: Vector data	100%	0%	0%	0%	**25%**
Census Data	100%	0%	0%	0%	**25%**
Municipal Data: Raster	0%	0%	0%	0%	**0%**
Municipal Data: Vector	0%	0%	0%	0%	**0%**
WWII Topographic Maps	0%	0%	0%	0%	**0%**
FBS Imagery	0%	0%	0%	0%	**0%**
Other Data	0%	0%	0%	0%	**0%**
Total	**60%**	**44%**	**18%**	**20%**	**36%**

Dashboard created by Sarah Reeser, GIS Analyst with Scholars Portal

This large-scale infrastructure redevelopment has been an exciting opportunity for exploration and innovation, particularly with regards to metadata. Earlier this year, the decision was made to use Borealis (Dataverse) as the backend repository system for the new GeoPortal, leveraging existing metadata editing and data publishing features. As a part of this migration, the GeoPortal Redevelopment team is working closely with the Borealis team to expand the geospatial metadata block in Dataverse, based on the international ISO 19115 metadata standard. This expanded metadata block will better support curation and international alignment of geospatial metadata for enhanced discovery, sharing, and reuse. To learn more about how the Scholars GeoPortal and Borealis are leading this initiative for the broader geospatial data community, see our blog post on SPOTDocs.

To learn more about the GeoPortal Redevelopment Project workflows and priorities, check out this interview with our Metadata and Data Services Librarian, Alicia Urquidi Díaz, with the Western Association of Map Libraries, or visit the project page on SPOTDocs.

SPOTlight: Jo Ashley

Jo Ashley is a GIS Analyst with the GeoPortal team at Scholars Portal where she is responsible for processing and loading data to the GeoPortal. During the GeoPortal Redevelopment Project, Jo has been a leader in redeveloping workflows for data processing and publishing, as well as in testing these new workflows within the new GeoPortal architecture. Jo's deep domain expertise and familiarity with the history of GeoPortal data holdings have been foundational in creating a newly revised and harmonized naming convention for datasets. These new naming conventions have become the backbone of the data migration part of the GeoPortal Redevelopment Project, ensuring an accurate and efficient transfer of data from the legacy system to our new environment.

Patchwork & Tailoring:
Strengthening Odesi through Review & Repair

After spending several years focusing on the technological infrastructure, this year the Odesi team turned to the content, metadata, and loading processes. Specifically, we turned our attention to the MarkIt Program. Datasets are typically added to Odesi by student staff who take part in this program, under the direction of participating supervisors at institutions across OCUL. Students must "mark up", or add variable level metadata, to each dataset so that it can be visualized and analyzed using the Data Explorer. Doing this work in a distributed way, with students and supervisors at multiple institutions coordinated by the Odesi team at Scholars Portal, allows us to leverage the deep data expertise across the consortium, as well as fostering that expertise in MarkIt students as future data librarians and specialists.

Following the Odesi migration to Borealis, and given other shifts in the Canadian data landscape, SPOD called for a comprehensive assessment of the MarkIt Program and its role within Odesi. An assessment working group was charged with evaluating how effectively MarkIt supports data curation and discovery and with identifying opportunities to strengthen its contributions to Odesi's long-standing value for researchers in Ontario and across Canada. The assessment revealed that Odesi remains valued by libraries, particularly for the depth of its Statistics Canada PUMF collection, strong metadata quality, and intuitive search and browse tools. However, many are unaware of the role MarkIt plays in enabling these features, and MarkIt itself faces challenges related to administrative coordination, training, consistency, and capacity. The migration to Borealis has eased some aspects of participation, reducing technical barriers and creating new opportunities for cross-institutional collaboration.

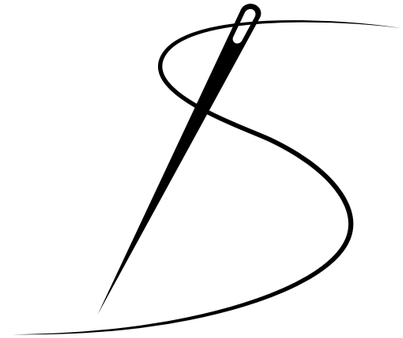
Since the release of the final assessment report in August 2025, substantial progress has been made on improving coordination and communication across the MarkIt Program. We've developed new training materials for recurring series and complex collections and introduced new communication channels to bring together student staff, supervisors, and Scholars Portal and Borealis staff to share updates and troubleshoot challenges. We are improving metadata consistency checks, both with dataset review checklists to support more consistency in manual quality checking and with scripts and bulk-processing tools to perform automated checks. Parallel efforts are underway to document automated workflows, explore file-preparation standardization, and develop scripts and APIs that will support greater efficiency across the service.

Progress on these recommendations has already strengthened collaboration between Scholars Portal, MarkIt supervisors, and partner projects such as Global Affairs Canada pilot and the Canadian Data Rescue Project supported by the OCUL New Initiatives Fund. We are also considering potential ways to strengthen Odesi by expanding MarkIt beyond Ontario. This assessment has set a clear path toward a more resilient and coordinated data curation program, ensuring that Odesi continues to evolve as a trusted and comprehensive data service.

SPOTlight: Thierry Letendre

Thierry Letendre is a UofT iSchool student working with the Scholars Portal Data Services Team. Thierry has been a key contributor to improving Odesi metadata, particularly with French datasets. Over the past year, he has worked through a significant data backlog, loading dozens of new French datasets to Odesi and revising over 230 existing French datasets for Quality Assurance/Quality Control (QA/QC). Throughout this project he has created an updated controlled vocabulary list for French data in Odesi with recommendations for improving metadata quality and ensuring greater consistency moving forward. We're fortunate to have Thierry on the Odesi team and we're grateful for all the work he has done to improve access and discovery for bilingual users.

The Crafter's Guild:
Building Scholaris Together



From the beginning, Scholaris has been rooted in community expertise and collaboration. As a national initiative, shared governance is essential for success, and the technical work behind the scenes has also been supported by many hands, both within the Scholars Portal team and beyond through the dedicated support and expertise of the Canadian library and repository community.

Here at home, the Scholars Portal team completed the first major version upgrade for all Scholaris production instances to DSpace 8.2 in fall 2025. This upgrade brought performance improvements, bug fixes, and enhancements including display of Creative Commons license badges on item pages, label translations, and added search features. A further minor upgrade of all instances to DSpace 8.3 was completed in January 2026. From onboarding to ongoing repository management, the Scholars Portal team has provided tailored guidance, training, and resources to support participating institutions of varying size and capacity. This work has also involved implementing configurations to meet local needs and increase the broader discovery of Canadian research in institutional repositories, such as interface customizations and integrations for external authentication, automated DOI registration, and ORCID syncing.

The Scholaris Network of Expert Groups continue to provide vital guidance for the service and the Canadian repository community. The Metadata and Discovery Expert Group has been working closely with the Scholaris team to test Configurable Entities and expand documentation to support Early Adopters with implementing this feature. The Electronic Theses and Dissertations Expert Group published recommendations for Alternate Format Theses, and the Digital Preservation Expert Group created a set of digital preservation explainers, offering a practical overview of digital preservation priorities and challenges in the institutional repository landscape. All documentation produced by the Scholaris Network of Expert Groups is available in TSpace with more reports forthcoming as these groups continue their work.

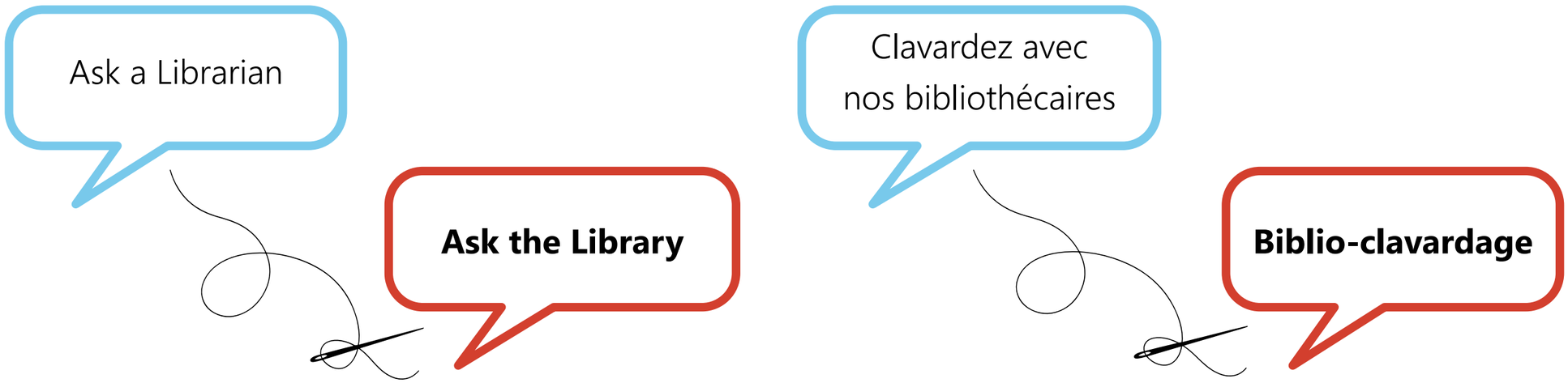
As we approach the end of the two-year Early Adopter program and move into a new phase of service development, we are excited to have 22 institutions live on Scholaris infrastructure with more to come as we work towards a fully operational service.

Checking our Gauge & Adjusting to New Contexts with Ask the Library

This year, we led a collaborative initiative to rename our long-standing virtual reference service, Ask a Librarian. The new name signals a refresh to the service and reflects that the highly skilled operators delivering virtual reference include both librarians and library staff.

The renaming process was grounded in shared principles: the new name needed to align with the service's trusted brand, avoid referring to specific job titles, work well in both English and French, and clearly distinguish the human-centred service from automated tools. After testing a longlist of names with local coordinators and members of the OCUL-Scholars Portal Subcommittee, we hosted multiple focus groups to test our shortlist of names with Ask operators from institutions across Ontario. This approach ensured that feedback from operators directly shaped the final recommendation.

Based on strong and consistent feedback, Scholars Portal staff and local virtual reference coordinators recommended renaming the service Ask the Library in English. Participants valued the name's clarity, action-oriented language, and continuity with the existing brand, while also recognizing the collective expertise behind the service. For French, additional consultation with bilingual institutions led to the adoption of Biblio-clavardage, a concise and user-friendly alternative that better reflects francophone language use. Both names were formally approved through OCUL governance processes in late 2025.



The new service name will be rolled out in summer 2026, ahead of the academic year. Alongside the renaming, the project has prompted broader conversations about branding, accessibility, and the visibility of virtual reference services across member libraries. This is especially important because usage of Ask is directly correlated with how visible and understandable the service buttons are on library websites.

This work underscores our commitment to inclusive service design, meaningful consultation, and continuous improvement in shared library services.

SPOTlight: Guinsly Mondésir

Guinsly Mondésir is the Virtual Reference Services Librarian at Scholars Portal and the service lead for Ask the Library. It's been a busy year for Ask, with governance changes, new working groups, and a service rebrand in progress. Throughout this time of change Guinsly has served as a steady, well-known, and trusted representative for the Ask community, acting as the key liaison with LibraryH3lp — the vendor of our chat software — to surface questions, concerns, and technical glitches, and to maintain clear communication with participating schools. A founding member of the Canadian Collaborative Virtual Reference Group, he is consistently working to share knowledge and expertise with others and to ensure that the training, policies, and service expectations for Ask meet best practices and industry standards.

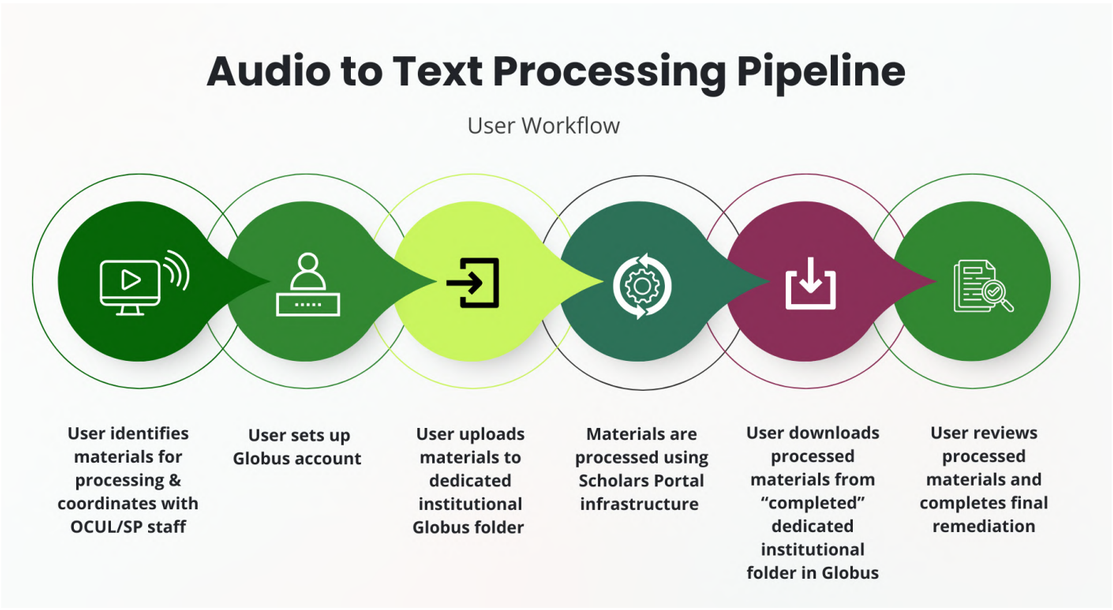
The Sewing Kit:
Leveraging AIML Tools for Metadata & Accessibility

As the technology landscape continues to evolve and bring forth new artificial intelligence software and tools, we are actively exploring opportunities to integrate these tools into our own processes and workflows. Our exploration of these emerging technologies is rooted in our commitment to open source and our curiosity about how they can support and enhance existing priorities like reliable metadata records and improving the discoverability and accessibility of our resources. Over the past year, Scholars Portal staff have been exploring the opportunities afforded by AI integrations in three areas: government documents, geospatial data, and audio to text software.

Audio to text transcription

Over the past year, Scholars Portal has been working with the audio to text model Whisper to consider the feasibility of a new service offering in this area. Through a consortially-hosted Whisper pipeline, Scholars Portal could support OCUL member libraries with improving accessibility of their audiovisual (AV) collections using Whisper to generate transcripts. Working with the OCUL AIML Program Team to test Whisper's capabilities using a test corpus allowed us to trial a service workflow and evaluate resource needs for a project like this.

The Scholars Portal instance of Whisper uses Globus, a secure file transfer system, for file upload and retrieval. Users upload AV files to an institutional input folder in Globus, automatically triggering a script created to check for new content and begin processing the materials. Users can then access both the original recordings and the generated transcripts in the corresponding output folder. Processing time varies based on file size and the number of files. While a specific turnaround time cannot be guaranteed, our test corpus shows that users were typically able to access transcripts within a 48-hour period. The process is designed to allow libraries to use the pipeline independently with minimal reliance on Scholars Portal staff while still having ready access to support where needed.



Created by Kari D. Weaver, Program Manager for the OCUL AIML Program

Geospatial Metadata

The GeoPortal Redevelopment Project team is also exploring AI and Machine Learning opportunities for metadata enhancement, specifically through OCR image-to-text extraction with our historical topographic map collections. In order to improve search and discovery of these maps we are using Tesseract OCR — one of the models tested for the Government Documents Project — to extract raw, georeferenced text elements from the scanned map images. The extracted text is then fed to an LLM which outputs the information as tabular data reflecting specific metadata fields. You can view examples of this text extraction process and learn more about how this approach supports streamlined QA/QC work in our Love Data Week 2026 blog post on Expanding discovery and access to Canada's topographic maps at Scholars GeoPortal.

Government Documents

As part of the OCUL AIML Program's Government Documents Project, Scholars Portal staff have been exploring the use of different OCR and generative AI models to improve metadata quality for a set of 50,000 government documents. To date, we have tested 10 generative AI models, developing and refining prompts to pull metadata elements from the OCR'd documents. With support from the OCUL Government Information Community we have narrowed our focus to a specific model and prompt, and we will be wrapping up the project in summer 2026. As members of the HEQCO Generative AI Consortium, we received a grant to support this work, allowing us to move all documents through the OCR pipeline and generate metadata for much of the collection. This metadata will be exposed via Scholars Portal Books and made available for other members who would like to explore the dataset.

SPOTlight: Stefania Kuczynski

Stefania Kuczynski is a UofT iSchool student working on the Government Documents Project. Her research and understanding of government information and metadata standards used to catalogue government materials have been invaluable in helping us prioritize metadata elements for this project. Stefania has conducted extensive testing of OCR tools and LLMs and has taken the lead in community engagement, giving project updates and requesting feedback from subject matter experts. She has co-authored blog posts for the HEQCO AI consortium and presented on the initiative at Government Information Days 2025. Stefania brings a wonderful combination of curiosity and optimism to all of her work, and we're very glad to have her on our team.

Staffing Update

New Staff

Meghan Xu - Programmer/Analyst

Farewells

Carlos McGregor - Formerly Senior Systems Administrator – Devops

Niranjan Bhimavarapu - Formerly Systems Administrator - Devops

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