scholaris

A Canadian Shared Institutional Repository Service
Un service partagé national de dépôt institutionnel

Scholaris Information Session
scholaris.ca

September 11, 2024

Housekeeping

- Welcome to the wonderful world of Scholaris!
- This session, including the Q&A is being recorded
- Recordings and slides will be emailed and posted to SPOTDocs
- Captions (en) are available
- Use the Q&A tab to type questions during the presentation or unmute during the Q&A period
- Use the chat for conversations with your fellow attendees
- Questions after the session? Send them our way! info@scholaris.ca

Land acknowledgement

Photo credit: Romi Levine, courtesy of University of Toronto

We wish to acknowledge this land on which Scholaris Portal operates, through the University of Toronto. For thousands of years it has been the traditional land of the Huron-Wendat, the Seneca, and the Mississaugas of the Credit.

Today, this meeting place is still home to many Indigenous people from across Turtle Island and we are grateful to have the opportunity to work on this land.

Outline for Today's Session

- Background on Scholaris
- Technical Infrastructure
- Community Infrastructure
  - Update from the Early Adopters Program
  - Updates from the CARL Expert Groups
- Future directions

- Q & A

Scholaris: Developing a National Shared Repository Service

Background

- OCUL and CARL
  - Investigations on feasibility of shared repository infrastructure
  - Was there interest? Yes!

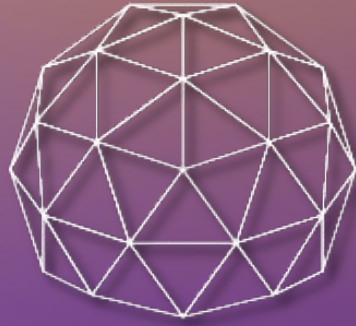- Recommendations

| Service provider: Scholars Portal (UTL) | Platform: DSpace | Governance and Expert Groups: CARL, SRIAC | Pilot Project ↓ Early Adopter Program |

Technical Infrastructure
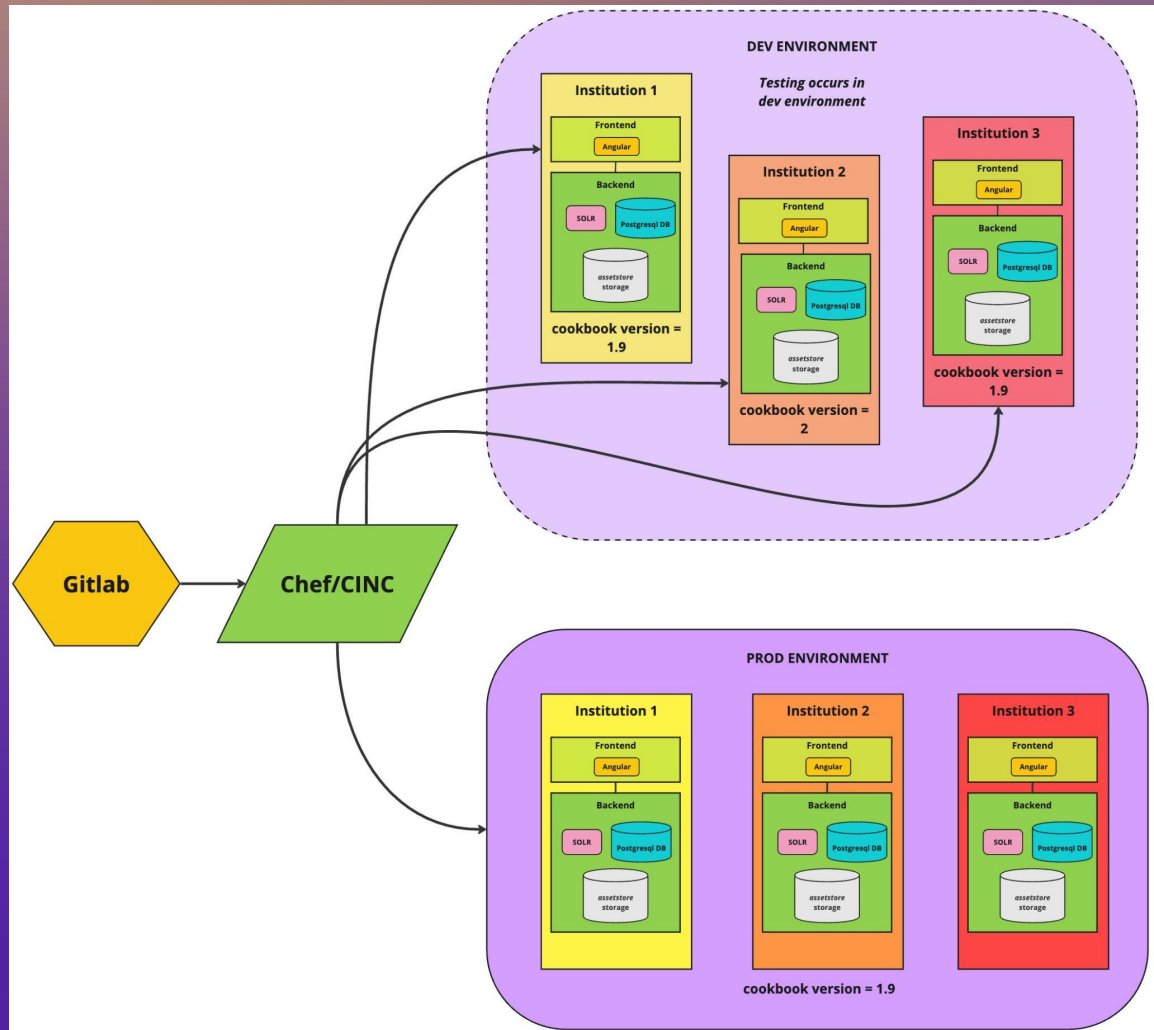
Community Infrastructure

Technical Infrastructure

- Scholaris is a repository service not a single repository platform
  - Parallel DSpace instances
  - No multi-tenancy in DSpace

- Institutionally-branded DSpace instances (dev and prod) for each institution
  - URL: [institutionidentifier].scholaris.ca
  - "Powered by Scholaris" logo

- Centrally hosted and managed by Scholars Portal through SaaS model
  - Chef-automated workflows using cookbooks, centralized codebase with changes quickly deployed across instances
  - Building on SP experience with IaC - Infrastructure as Code

Diagram break!

Scholaris architecture →→

Technical Infrastructure

Currently:

- Migration / set up of DSpace 7.6 instances
- Developing Chef cookbook and automated workflows
- Early Adopters have repository admin access to dev and prod instances through the UI
- Upgrade to 7.6.2 in progress

In the future:

- Institutional access to git repository for specific config files
  - Institutions can create pull requests to have changes applied to their instance

- National discovery layer
  - Searching across repositories (including non-Scholaris repositories)

Community Infrastructure

1. **Early Adopter Program (2024-2026)**

    First Call for Expressions of Interest - March 2024

    Desired use cases:

    a. New repositories
    b. Existing DSpace repositories
    c. Non-DSpace repositories

    - Repositories operating in French / bilingual component
    - Repositories of varying size and complexity

Early Adopter Program (2024-2026)

- **Pilot schools - Fall 2023**
  - University of Toronto (in progress), Ontario Tech (live!)

- **Early Adopters Program: Cohort 1 - Summer 2024**
  - Going live this month: Laurentian
  - In progress: Bishop's, UdeM, CBU, Mount Allison, StFX, Université de Moncton

- **Early Adopters Program: Cohort 2 - Fall 2024**
  - Onboarding this month: Alberta, Calgary, Memorial, Université de Sherbrooke

- **Early Adopters Program: Future cohorts - 2025**
  - Western, Windsor, TMU

Early Adopter Program: ⚡Lightning Round ⚡

- **Can we still join?**
  - Yes! We are accepting applications for migrations beginning Q2 2025 - Q2 2026
  - Participation is open to research libraries at Canadian universities and CARL members
  - [Expression of Interest form](#) (also available on our website - **scholaris.ca**)

- **Pricing?**
  - See Call for Early Adopters
  - Ongoing fees to be based on CRKN Banding System

- **What can I expect as an Early Adopter?**
  - Upcoming info session or send us an email: info@scholaris.ca

- **Lessons learned so far?**
  - Planning at the institutional level ahead (conversations with central/library IT, vendors, stakeholders)
  - Understanding historical customizations (e.g., rationale for previous decisions)
  - Common requests from Early Adopters
  - Tapping into the repository community - we don't have to reinvent the wheel but we can help polish the spokes

Service FAQs ⚡ Lightning Round ⚡

- ⊗ **Back-end access?**
- ⊘ **Custom submission forms?**
- ⊘ **DOIs?**
- ⊘ **External authentication?**
- **Core code changes?**
- ⊘ **Upgrade to DSpace 8?**
- ⊘ **Configurable Entities?**
- ⊘ **ORCID integration, OpenAIRE integration?**
- ⊘ **Storage?** - Currently: U of T data centre. In future: Explore OLRC options
- ⊘ **Preservation options?** - In progress with support from the DPEG Expert Group

⊘	Now
⊘	Soon!
⊗	No
◯	TBD

Community Infrastructure

2. CARL Expert Groups

- **S-MDEG: Metadata & Discovery Expert Group (est. March 2024)**

- **S-ETEG: Electronic Theses & Dissertations Expert Group (est. March 2024)**

- **S-DPEG: Digital Preservation Expert Group (est. August 2024)**

Questions about the groups? Contact Gabriela: gabriela.mircea@ucalgary.ca or the chairs

S-MDEG: Metadata & Discovery Expert Group

Co-Chairs: Mike Nason (UNB), Jordan Pedersen (Guelph)

Sub-groups:

- Minimum Viable Metadata
- Metadata Cleaning for Migration
- Multilingual Metadata
- Configurable Entities
- Light recommendations for Persistent Identifiers

Mike: mnason@unb.ca
Jordan: jpederse@uoguelph.ca

S-ETEG: Electronic Theses & Dissertations Expert Group

Co-Chairs: Leah Vanderjagt (Alberta), Nicole White (SFU) ([link to ToR](#))

Sub-groups/deliverables:

Near-term:

- **Needs assessment survey**
- **LAC harvest requirements**
- **ETD review in DSpace**
- **ETD standards adherence**
- **"Non-traditional/alternative format" theses**
- **Tools for effectively managing ETD migration (e.g. checklists)**
- **Recommended ETD migration references and resources**

End deliverables:

- **STANDARDS RECOMMENDATIONS**
- **WORKFLOWS MANUAL**
- **COMMUNITY RECOMMENDATIONS**

Leah: leahv@ualberta.ca
Nicole: ngjertse@sfu.ca

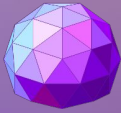# S-DPEG: Digital Preservation Expert Group

Chair: Julie Shi (Scholars Portal)

Providing guidance, recommendations, and advice on digital preservation planning requirements and pathways for the Scholaris service team

- Defining the preservation offering in the Scholaris service model
  - Technical workflows
  - A risk management matrix
  - Roles and responsibilities
  - A Scholaris preservation plan

- Establishing a shared understanding of digital preservation in the Canadian repository and Scholaris contexts
- Developing a toolkit to support institutional preservation practices

Julie: juli.shi@utoronto.ca

Community Infrastructure

3. The (Inter)National Repository Community

- **SP and CARL platforms**
  - scholaris.ca
  - SPOTDocs, CARL website

- **Information Sessions and Community Calls**
  - Information Sessions (repository community)
  - Community Calls (Early Adopters) - Monthly
  - Outreach via Scholaris listserv
  - Outreach via CARL E-lerts and listservs, ScholComm Mattermost, SPOTDocs

- **Conversations with international repository organizations, consortia, similar shared repository services, etc.**

Planning for a bright Scholaris future

Shaped through our work with Early Adopters, advisory and expert groups, and the broader repository community:

Areas of focus

- Recommendations from expert groups - to be reviewed by SP and SRIAC
- What is feasible from resource/capacity, security, technical service standpoints?
  - Default vs. optional vs. not supported
  - Recommended vs. baseline
- Striking that balance - streamlining service delivery while accommodating varied repository use cases/needs for customizations and support
- Service roles and responsibilities (for SP, for local institution)
- Bilingual service development
- Cost estimation for on-going, optional services

Questions?

You can also send your questions to:

✈️ **the Scholaris team: info@scholaris.ca**