



**scholaris**

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

**Scholaris Information Session**  
**[scholaris.ca](http://scholaris.ca)**

**January 21, 2025**

# Housekeeping

- Thanks for joining us for another round of Scholaris updates 😊
- 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](mailto:info@scholaris.ca)

# Land acknowledgement



Photo credit: Matteo, Life @ U of T blog.

*We wish to acknowledge this land on which Scholaris Portal operates at 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

- Scholaris Updates
  - Overview of the service
  - Updates from the Early Adopter Program
  - Projected roadmap for 2025
  - Updates from the CARL Expert Groups
- Q & A



Service  
Provider:  
Scholars Portal  
(University of  
Toronto Libraries)



Governance,  
Expert Groups:  
CARL, SRIAC



Software:  
DSpace



Pilot Project and  
Early Adopter  
Program

# The Scholaris Team at Scholars Portal

- Mohana Sarmiento, Systems Administrator - Devops (Service lead)
- Julia Gilmore, Digital Projects Librarian (Service lead)
- Rachel Wang, Systems Administrator - Devops
- Harpinder Singh, Associate Director, Systems and Technical Operations
- Bikram Channa, Senior Systems Administrator
- Kate Davis, Director, Scholars Portal



Mohana



Julia



Rachel



Kate



Harpinder



Bikram

*...with support from many other SP staff members, CARL staff and the CARL VPO, Gabriela Mircea*



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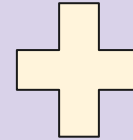
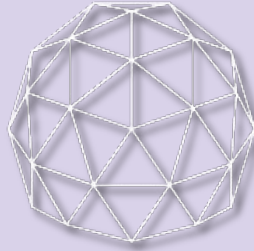
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# A brief overview of Scholaris

## Technical Infrastructure



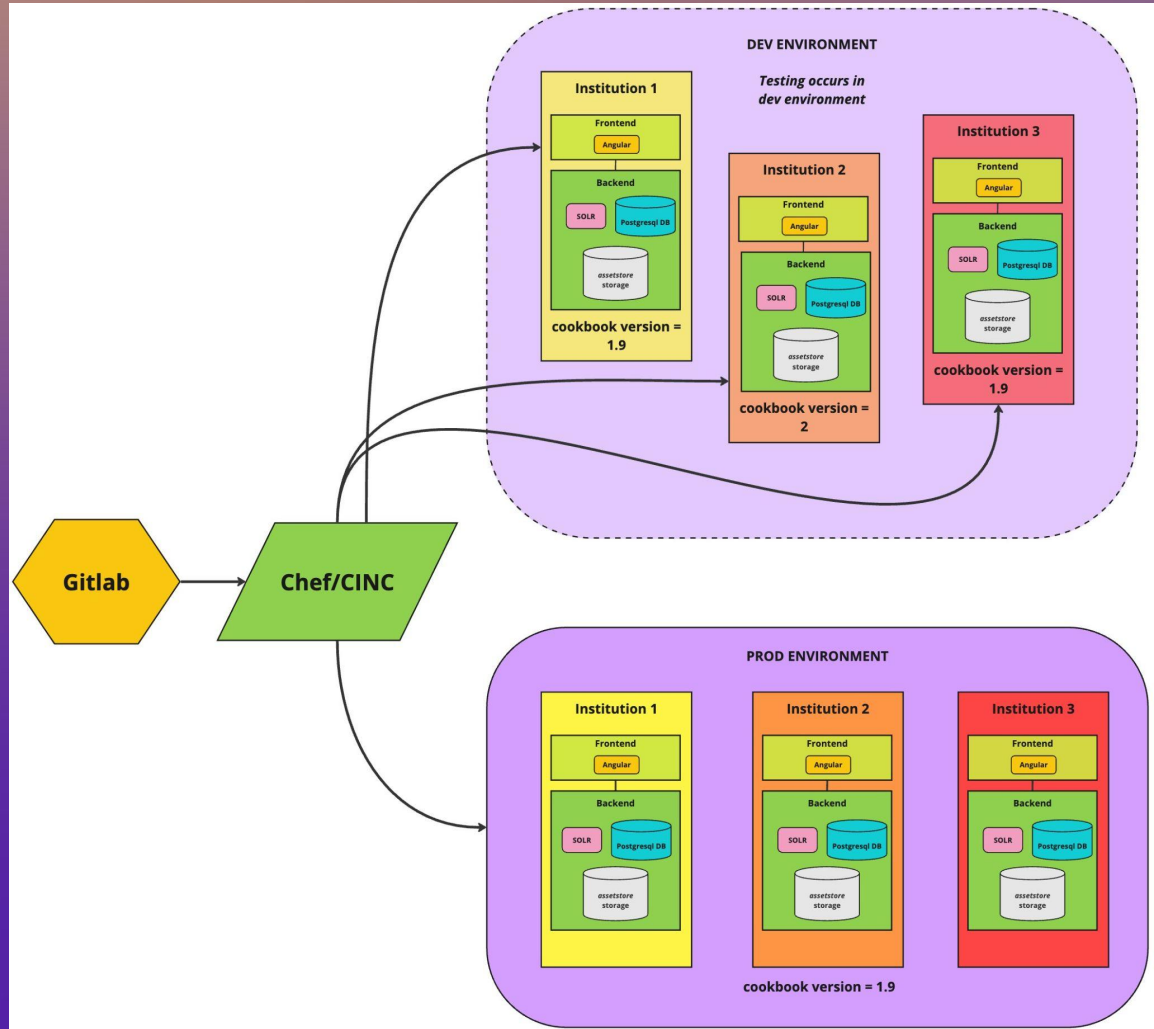
## Community Infrastructure

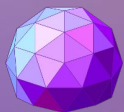


- *Scalable, Efficient, Affordable & Flexible*
- **Informed by community needs, expert group recommendations and shared resources**



Let's revisit this beautiful diagram of the Scholaris architecture >>>





## Scholaris updates and outreach (aka hello world 🙌)

- **Scholaris Information Sessions**
  - Open to Repository Community
  - Schedule: Quarterly
- **Scholaris Community Calls**
  - Open to Early Adopters
  - Schedule: Monthly, every 2nd Wednesday of the month
- **Scholaris Special Interest Sessions** (Early Adopters)
- **Scholaris mailing list** (Early Adopters)
- **Scholaris channel on ScholComm Canada Mattermost** (Repository community)
- **Upcoming presentation:** OLA Conference 2025 - January 30, 2025



# Updates from the Early Adopter Program



# Early Adopter Program (2024-2026)

- **Pilot schools - Fall 2023**
  - 🎮 Live: Ontario Tech, University of Toronto
- **Early Adopters Program: Cohort 1 - Summer 2024**
  - 🎮 Live: Laurentian, St. Francis Xavier, Mount Allison, Cape Breton
  - In progress: Bishop's, Université de Montréal, Université de Moncton, NSCAD
- **Early Adopters Program: Cohort 2 - Fall 2024**
  - In progress: Alberta, Calgary, Memorial, Université de Sherbrooke
- **Early Adopters Program: Future cohorts - 2025**
  - In progress: Brock, Carleton, Western, Windsor
  - Scheduled for Fall 2025: TMU
  - ...more to come!

## Technical Specs

**Current version:** 7.6.2

**Architecture:** Parallel instances - each school has its own database, SOLR, assetstore on own VM

**URL:**  
[institution.scholaris.ca](https://institution.scholaris.ca)

**"Powered by Scholaris"**  
footer



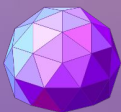
Applications for the program are open for schools wishing to start their migration by Q2 2026.



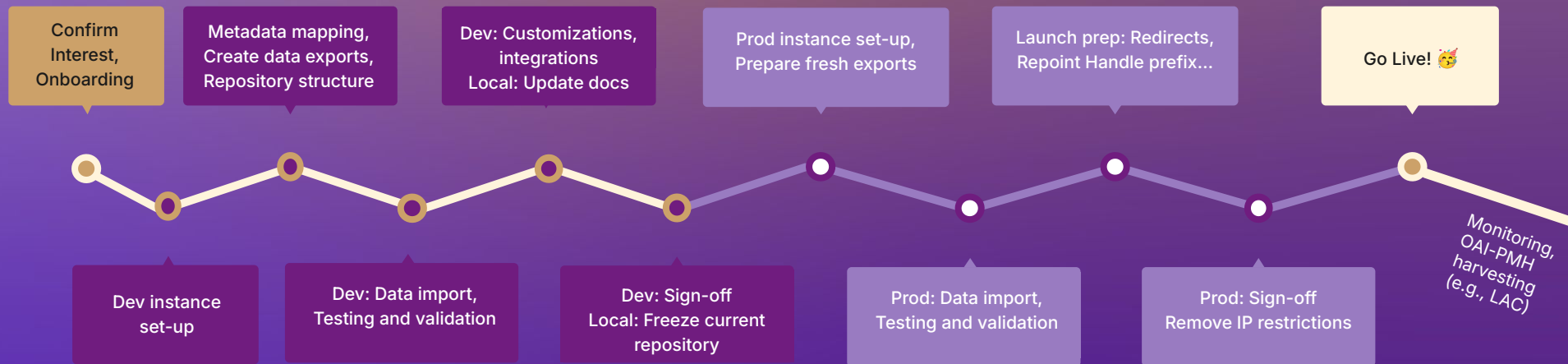
# Early Adopter Program (2024-2026)

**We're interested. What can we expect?**

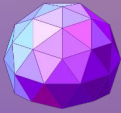
- SPOTDocs - [Onboarding and Migration Process](#)
- SPOTDocs - [Data Migration Overview](#)
- **Scholaris Service FAQs** (email us!)
  
- Migration Readiness Checklist (coming soon)
  
- Pricing (available on our website: **[scholaris.ca](https://scholaris.ca)**)
  - Ongoing service fees to be finalized mid-2025.



# General migration sequence



- **Service agreement and billing**
  - Agreement signed by regional consortia. Invoicing and payment through regional consortia.
- **Timelines for migrations**
  - It depends! We recommend budgeting at least 3 months from Onboarding > Launch.



# Some of our Early Adopter FAQs

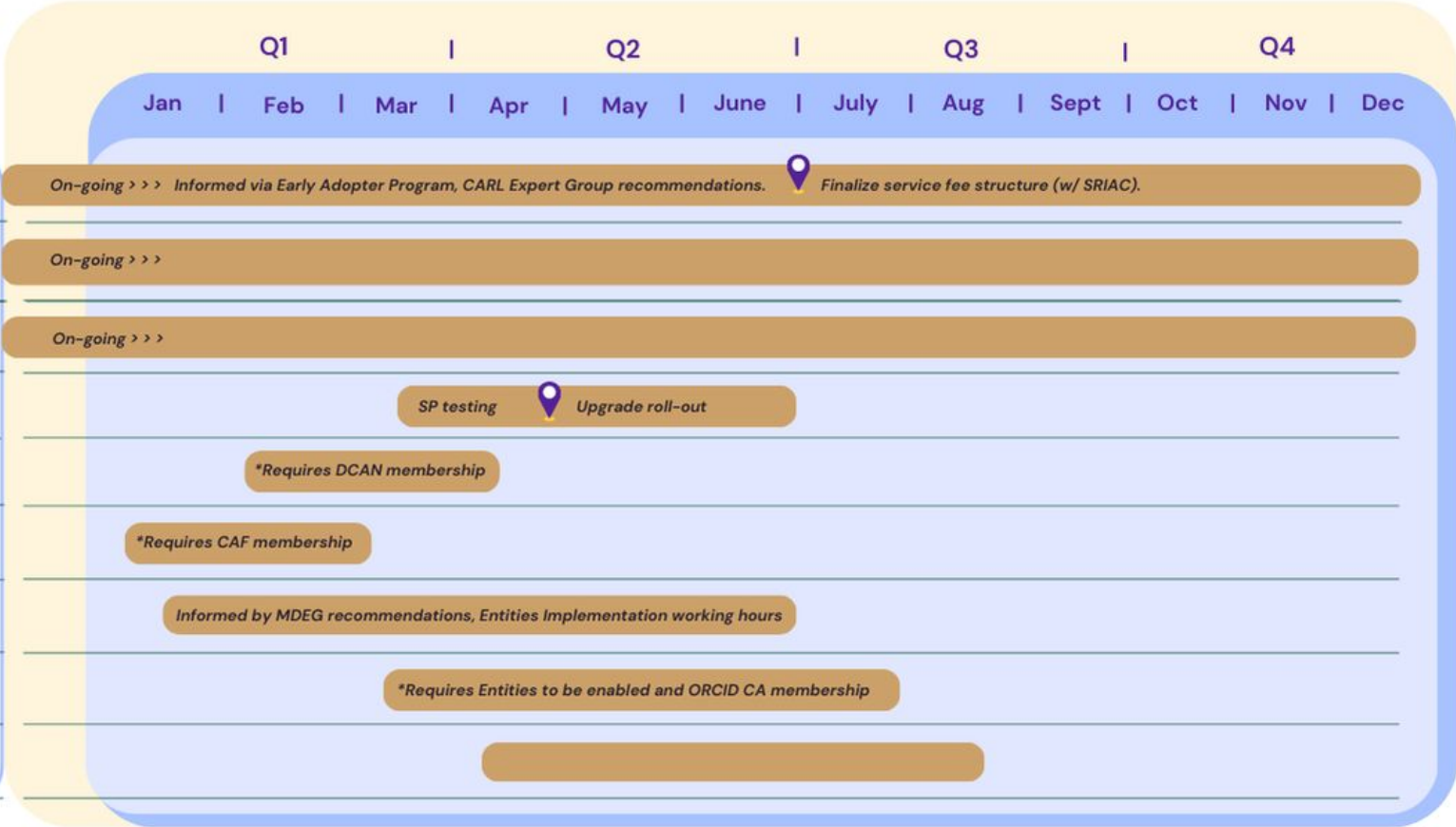
- **Data exports?**
  - Globus file share for uploading exports (imported by SP through the back-end)
  - Non-DSpace export/import options: SAF packages, DSpace API, AIPs (not tested yet)
  - Non-DSpace: repository hierarchy can be (re)structured and imported using Structure Builder Tool
- **Metadata cleaning?**
  - In most cases, performed by the institution (you know your metadata 😊)
  - Recommendations from the expert groups can and do help!
  - Can be done pre-, during, or post-migration.
- **Submission forms?**
  - Options: request changes to SP, edit template sheet, edit DSpace config files and send back to SP.
  - Less forms = less maintenance 😊.
  - ETDs are a good use case for a custom form.
- **Customizations**
  - Config changes? Yes. Core code changes? No.
  - What are your show stoppers? Maybe they are already on the DSpace/Scholaris roadmap.

# Looking ahead for 2025: Scholaris Road Map

# Scholaris Projected Roadmap for 2025

 Key areas of focus

- Task
- Service development
- Early Adopter migrations
- Technical support
- Upgrade to DSpace 8
- DOIs via DataCite API
- CAF Shibboleth integration
- Configurable Entities
- ORCID Integration
- D8 Features, Integrations (e.g., ROR, COAR Notify)



# In progress and/or on our radar

- DSpace community contributions
- Collaboration with harvesting platforms and international initiatives (LAC, Érudit, Ex Libris CDI, OpenAIRE, COAR, etc.)
- Consultations with Tri-Agencies re: OA Policy updates
- Git repository
- Discovery layer
- Preservation within the service model



# Updates from the Scholaris Network of Experts



## CARL Network of 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](mailto:gabriela.mircea@ucalgary.ca) or the chairs



## S-MDEG: Metadata & Discovery Expert Group

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

- Thank you to everyone who gave us feedback on the working recommendations documents
- We are now responding to feedback, and you can expect to see the version 1 release of those documents in early March



Mike: [mnason@unb.ca](mailto:mnason@unb.ca)

Jordan: [jpederse@uoguelph.ca](mailto:jpederse@uoguelph.ca)



# S-ETEG: Electronic Theses & Dissertations Expert Group

Co-Chairs: Leah Vanderjagt (Alberta), Nicole White (SFU)

([link to ToR with deliverables listed](#))

- Thank you for your feedback on the [Library and Archives of Canada Harvest Requirements](#) deliverable
- Huge thank you to everyone who completed our Needs Assessment survey. More than 40 institutions responded! Your responses are essential to our ability to complete our deliverables.
- We are aiming to complete all our deliverables by mid-March and anticipate about 1 month consultation period subsequently.



Leah: [leahv@ualberta.ca](mailto:leahv@ualberta.ca)

Nicole: [ngjertse@sfu.ca](mailto:ngjertse@sfu.ca)



# S-DPEG: Digital Preservation Expert Group

## Chair: Julie Shi (Scholars Portal)

### Supporting the Scholaris service team

- Finalizing draft of risk management matrix to support identification and mitigation strategies for both near and long-term planning

### Supporting Scholaris participants

- Developing a survey to better understand the preservation practices and needs of institutional repositories across Canada
- Conducting an environmental scan of existing preservation policies and repository documentation
- Outlining recommendations for a service model to meet various institutional preservation needs



Julie: [juli.shi@utoronto.ca](mailto:juli.shi@utoronto.ca)

Thank you for joining us today. Any questions?



You can also send your questions to:

✈️ the Scholaris team: [info@scholaris.ca](mailto:info@scholaris.ca)