

scholaris

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

Building Scholaris Together: Reflections from Developing a Shared Repository Service through an Early Adopter Program and a Network of Experts


CRKN 2026

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scholaris.ca

Laying the groundwork

- Provincial and national feasibility studies
- Demonstrated interest in shared repository infrastructure
- Pilot project with 2 OCUL institutions (Summer 2023)
- Agreement to develop shared service model (Fall 2023) 



Service Provider:
Scholars Portal
(UTL)

Support: CARL,
SRIAC, regional
consortia, expert
groups



Software:
DSpace

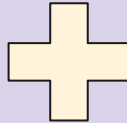
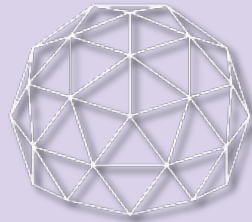


Development:
Pilot Project, Early
Adopter Program

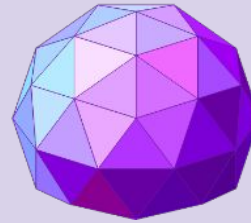
A brief overview of Scholaris



Technical
Infrastructure



Community
Infrastructure




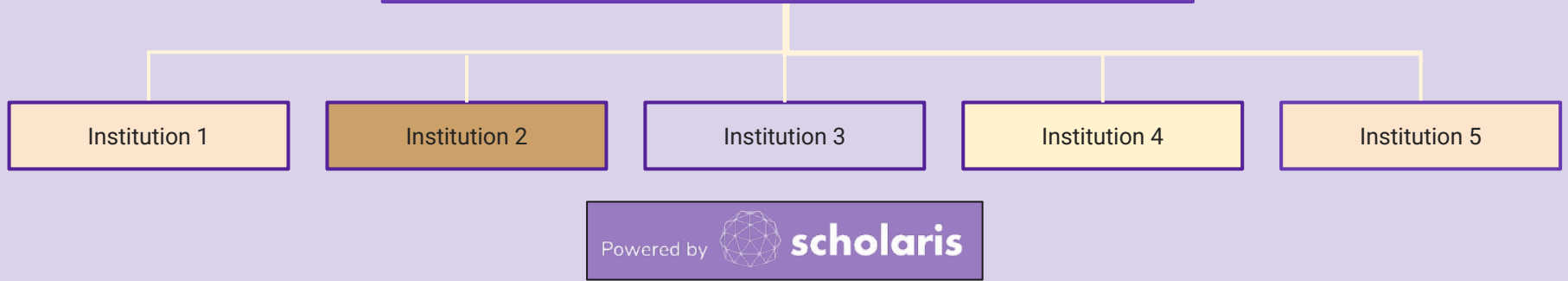
- Parallel instances of DSpace
- Centrally hosted and managed by Scholaris (Scholars Portal)
- Focus: building a scalable, efficient, affordable & flexible service model

- Early Adopter Program
- Scholaris Network of Expert Groups
- Participation in Canadian, international, DSpace repository communities and initiatives



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 **Scholaris as a Service:**
Centralized Service Delivery, Hosting, Technical and Community Support



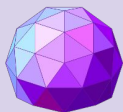
Key Points

- Scholaris provides technical and community infrastructure to subscribing institutions.
- Scholaris helps repository teams support their scholarly communities.
- Scholaris is a repository service, not a single repository platform or discovery layer.
- Local repository teams manage the daily operations of their repository and have flexibility to add desired customizations and integrations (supported within the service model) to meet the needs of their own communities.

More information: [Scholaris Communications Kit \(EN | FR\)](#) on SPOTDocs

Developing the Service

- a. Early Adopter Program**
- b. Network of Expert Groups**



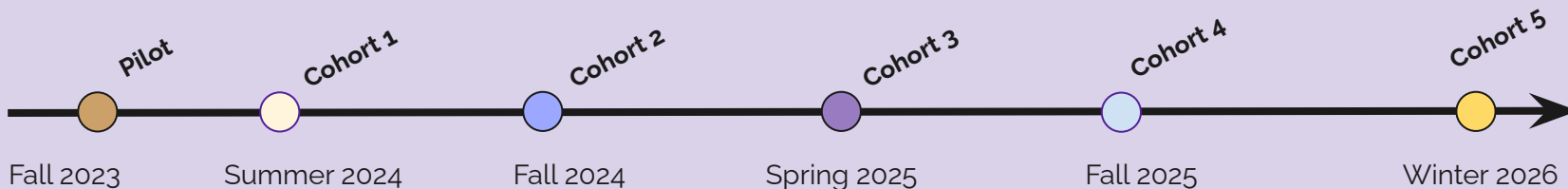
Early Adopter Program (2024-2026)

Program Eligibility

Open to Canadian academic universities representing various repository use cases.

Goals and expected outputs

- Migrate institutions to Scholaris infrastructure
- Define workflows and roadmaps for efficient migrations and on-going service delivery
- Define service offering (features, available customizations, etc.)
- Estimate costs and resources to establish cost-recovery pricing model
- Develop Scholaris community infrastructure 🌸



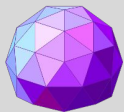


Highlights from the Early Adopter Program



- 28 institutions participating in the program - 22 are live on Scholaris infrastructure
- Hosting almost 700,000 items across Scholaris instances
- Completed 3 DSpace version upgrades (most recently: DSpace 8.3)
- Configured customizations, integrations, and crosswalk updates to support access, discovery, and streamlined repository management
 - SSO, DOIs, Entities, ORCID, LAC harvesting, OpenAIRE, etc.
- Hosted Scholaris Community Calls and Configurable Entities Working Hours
- Published a lot of documentation! [SPOTDocs > Scholaris](#)
- Developed service pricing model and policies (Terms of Use, Privacy Statement)

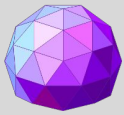




Scholaris Network of Experts

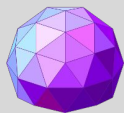
- **Scholaris Metadata and Discovery Expert Group (S-MDEG)** [Terms of Reference](#)
 - Focuses on developing metadata strategies and standards to enhance the discoverability of repository content
- **Scholaris Electronic Theses and Dissertations Expert Group (S-ETEG)** [Terms of Reference](#)
 - Works on the migration and integration of Electronic Theses and Dissertations (ETDs) into the shared infrastructure
- **Scholaris Digital Preservation Expert Group (S-DPEG)** [Terms of Reference](#)
 - Concentrates on establishing digital preservation protocols ensuring long-term access to digital assets

The Expert Groups operate under the aegis of CARL's Shared Repositories Infrastructure Advisory Committee (SRIAC).



Scholaris Network of Expert Groups

- **Composition of the Groups**
 - 8-10(ish) members of the Canadian repository community with specialized expertise related to the group's area
 - Representation from institutions that are currently or planning to be part of Scholaris
- **Meeting format and communication approaches**
 - Monthly 1 hour meetings
 - Communication via mailing list or emails
- **Common working styles**
 - Sub-groups created to tackle specific deliverables
 - Google project folders
- **Feedback mechanisms**
 - Recommendations circulated to CARL's Shared Repositories Infrastructure Advisory Committee (SRIAC) then Early Adopters and broader community for feedback



Recognizing the Experts

S-MDEG ([Terms of Reference](#))

Co-chairs

Robin Desmeules (McGill University)
Mike Nason (University of New Brunswick)

Committee Members

Caitlin Bakker (University of Regina)
Teresa Bascik (Université de Montréal)
Carl Brouillard (Université de Sherbrooke)
Pascal Calarco (University of Windsor)
Sharon Farnel (University of Alberta)
Laura Smart (Western University)
Carolyn Sullivan (University of Ottawa)

Past Members:

Jordan Pedersen (University of Guelph) - former co-chair
Cindy Beauchesne-Jolin (Université de Sherbrooke)
Kathryn West (National Research Council Canada)

Ex officio

Julia Gilmore (Scholars Portal)
Geoff Harder (University of Alberta)
Elizabeth Kalbfleisch (CARL)
Gabriela Mircea (University of Calgary | VPO, Metadata Strategies & Scholaris)
Michael Vandenburg (CARL)
Susan Haigh (Past Director, CARL)

S-ETEG ([Terms of Reference](#))

Co-chairs

Carrie Breton (University of Guelph)
Pascal Calarco (University of Windsor)

Committee Members

Laurence Charest (Université de Montréal)
Émilie Chouinard (Érudit)
Matt Dumouchel (Western University)
Sean Mclaughlin (Library and Archives of Canada)

Past Members:

Leah Vanderjagt (University of Alberta) - former co-chair
Nicole White (Simon Fraser University) - former co-chair
Annie Candeias (Université de Sherbrooke)
Jennifer Whitney (Carleton University)

S-DPEG ([Terms of Reference](#))

Chair

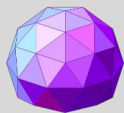
Julie Shi (Scholars Portal)

Committee Members

Corey Davis (University of Victoria)
Kenton Good (University of Alberta)
Steve Marks (University of Toronto)
Leanne Olson (Western University)
Andrea Sz wajcer (University of Manitoba)
Victoria Volkanova (Université de Moncton)

Past Members:

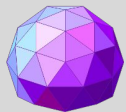
Kate Langrell (University of Saskatchewan)
Amelia Ritchie (University of Windsor)



Expert Groups' Outputs

Expert Group	Published Guidance and Outputs	Forthcoming
Scholaris Metadata & Discovery Expert Group (S-MDEG)	Cleaning Metadata for Migration Minimum Viable Metadata (MVM) Multilingual Metadata Entities Guidance and Advice Briefing Document on Persistent Identifiers	Entities Guidance v2 Submission Forms Guidance
Scholaris Electronic Theses and Dissertations Expert Group (S-ETEG)	Addressing Alternative Format Theses Guidance on LAC Requirements for Harvesting Theses & Dissertations ETD Needs Assessment Survey	ETD Needs Assessment Summary Report ETD Workflows
Scholaris Digital Preservation Expert Group (S-DPEG)	Risk Management Matrix (internal) Digital Preservation Explainers ++ DP Needs Assessment Survey DP Policy Environmental Scan	DSpace/Scholaris Preservation Features Sheet and Glossary DP Toolkit DP Needs Assessment Summary Report Scholaris Preservation Plan ++ Guidance on Preservation Service Offering

Find published recommendations on TSpace (utoronto.scholaris.ca): [Scholaris Network of Expert Reports](#)



Expert Groups - Scope and Scholaris Framing

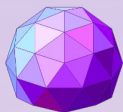
- Work has been intentionally anchored within the Scholaris implementation as a practical and strategic framework
- Scholaris is the starting point, but aspects of the work and outcomes have broader value
- Balance specificity (Scholaris-focused) and generality (broader community applicability)
- The conclusion of the expert groups' second and last term, providing a natural point for reflection and evolution



Outcomes of the Early Adopter Program and Expert Groups

- Understanding **repository interests, pain points, and opportunities** across institutional contexts
- Identifying platform **feature requests** and **desired functionality** to enhance/streamline repository management
- Identifying opportunities to provide **additional support and resources** (within Scholaris/DSpace)
- Identifying opportunities for greater **alignment** and **leveraging** of **global best practices and scholarly publishing initiatives**
- Informing roadmap and priorities for **future service development** and **governance structure**





What's next on the Scholaris roadmap?

Upcoming service development areas

- **Governance** modelling
- Understanding requirements for **ongoing service delivery**
- **Preservation** offering
- **Bilingual service** offering
- Increased involvement with **DSpace community**
- Support for implementation of **Tri-Agency Open Access Policy**
 - Contributing to community-informed initiatives, development projects
 - Providing configuration support for Scholaris institutions



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Thank you to our Early Adopters



- Algoma University
- Athabasca University
- Bishop's University
- Brock University
- Cape Breton University
- Carleton University
- Dalhousie University
- Laurentian University
- McGill University
- Memorial University
- Mount Allison University
- NOSM University
- NSCAD University
- Ontario Tech University
- Queen's University
- St. Francis Xavier University
- Toronto Metropolitan University
- Université de Moncton
- Université de Montréal
- Université du Québec à Montréal
- University of Alberta
- University of Calgary
- University of Manitoba
- University of Regina
- Université de Sherbrooke
- University of Toronto
- University of Windsor
- Western University

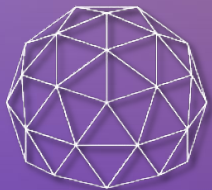




...and everyone!

- **CARL**
 - Michael Vandenburg (Director), Elizabeth Kalbfleish (Senior Program Officer), Taleen Aktorosian (Communications and Project Officer)
 - CARL VPO for Scholaris and Metadata Strategies: Gabriela Mircea
 - SRIAC and Network of Expert group members
- **Scholaris service team at Scholars Portal, particularly:**
 - Mohana Sarmiento (technical service lead)
 - Rachel Wang
 - SP Systems team
- **Developing partners**
 - University of Toronto Libraries
 - Regional consortia
- **Broader repository community members and stakeholders across Canada and internationally**





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Thank You!

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Gabriela Mircea: gabriela.mircea@ucalgary.ca

Questions about Scholaris? info@scholaris.ca