



PORTICO

What's it all about, Portico?

The how, the now, and future directions of Portico preservation

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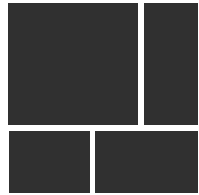
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Portico is committed to the preservation of scholarly literature published in electronic form to ensure that these materials remain accessible to future generations of scholars, researchers, and students.





At ITHAKA, our passion drives us to make the world smarter. Our mission comes to life in four service areas.



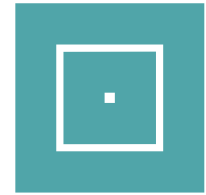
ARTSTOR



ITHAKA S+R



JSTOR



PORTICO

WHAT WE DO

Portico is a digital preservation service for e-journals, e-books, and other scholarly electronic content

Portico was started by JSTOR in 2005 with funding from the Library of Congress and the Andrew Mellon Foundation.

Emerged as a solution to issues raised by the transition from print to digital content (ensuring future usability of files, ensuring institutional access to content)

Portico is based on collaboration between libraries and publishers.

Portico was the first digital preservation service to be audited and certified as a Trustworthy Digital Repository by the Center for Research Libraries

We receive content directly from the publishers. This content is held in a “dark archive”: it is stored until a specific event occurs that causes content to become accessible (trigger events, perpetual/post-cancellation access)

Trigger events. They do happen.

- Why does content trigger? Multiple scenarios but mostly:
 - Publisher decision to no longer host
 - Publisher decision not to migrate ceased titles
 - Publisher goes out of business and some or all titles not picked up (less frequent)
- Portico has triggered 119 titles
 - 117 e-journals, 97 are OA
 - 1 reference work (New Partridge Dictionary of Slang . . .)
 - 1 abstracts database (PsycCRITIQUES)



PORTICO

Access

What happens when Portico triggers content?

- Work with publisher to ensure all content is in house and ingested/coordinate time frame
- Content opened according to agreement terms
 - For subscriptions/purchased content, institutions of Portico participating libraries receive access
 - For Open Access content, content is broadly available
- Linking vendors are notified so that they can update their databases to point to Portico
 - Updated KBART files provided via link/attachment
- Metadata file is sent to CrossRef so that DOIs are redirected to Portico

Perpetual/Post-cancellation Access

Publishers may opt in to Portico's post-cancellation access service.

- customers can request access to previously subscribed to/purchased material via Portico
- must be Portico participant in addition to publisher customer
- for some publishers, Portico is only perpetual access option; others also offer it through their platforms
- libraries are encouraged to investigate all options, request from publisher first
- perpetual access stats:
 - 444 e-journals
 - 404 e-books
 - 271 institutions



PORTICO

Access

PORTICO'S SERVICES



**E-JOURNAL
PRESERVATION SERVICE**



**E-BOOK
PRESERVATION SERVICE**



**D-COLLECTION
PRESERVATION SERVICE**

PUBLISHER & LIBRARY FEES

PUBLISHER FEES, NO LIBRARY FEE

Global Library Participation

1,033 participating libraries
22 countries



Global Publisher Participation



625 participating content providers
+2000 publishing entities*
61 Countries

* Small publishers added through their arrangements with Portico participants.

Publisher Participation

E-journal service

- 486 publishers participating, 19 agreements YTD 2019
- 196 have at least some OA titles and on an agreement that ensures content remains OA
- 2015-2019, majority of signings = small OA publishers

E-book service

- 176 publishers participating, includes OA
- Increasingly, publishers also committing non-standard e-books (e.g., reference works)

D-collections service

- 5 publishers participating + CrossRef
- 221 collections committed
- new interest from smaller players and traditional publishers launching primary source collections



HOW DOES IT WORK?

Portico is a centralized and replicated repository and uses migration as its primary long-term archival approach, as part of a managed preservation strategy.



Portico defines fully managed digital preservation as the series of policies and activities necessary to ensure the usability, authenticity, discoverability, and accessibility of content over the very long-term.



USABILITY



DISCOVERABILITY



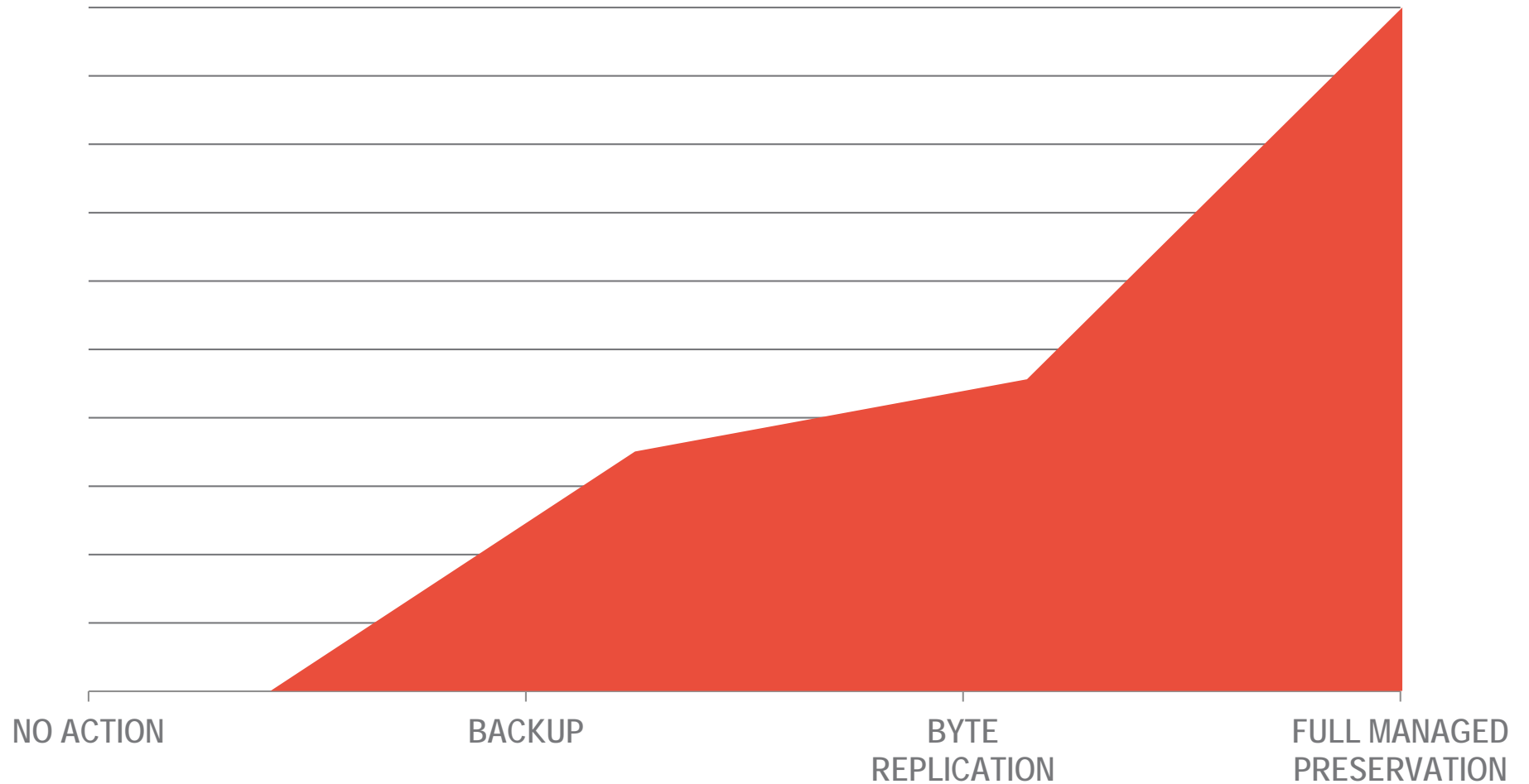
AUTHENTICITY



ACCESSIBILITY

CONTENT MANAGEMENT ACTIVITIES

Portico provides preservation at the far end of the scale.
We manage the content in our care very closely. The primary preservation methodology is migration—transitioning content from one file format to another as technology evolves.





Two Initial Transformations

1. Metadata into JATS or BITS

2. Packaging





Post-archiving Activities

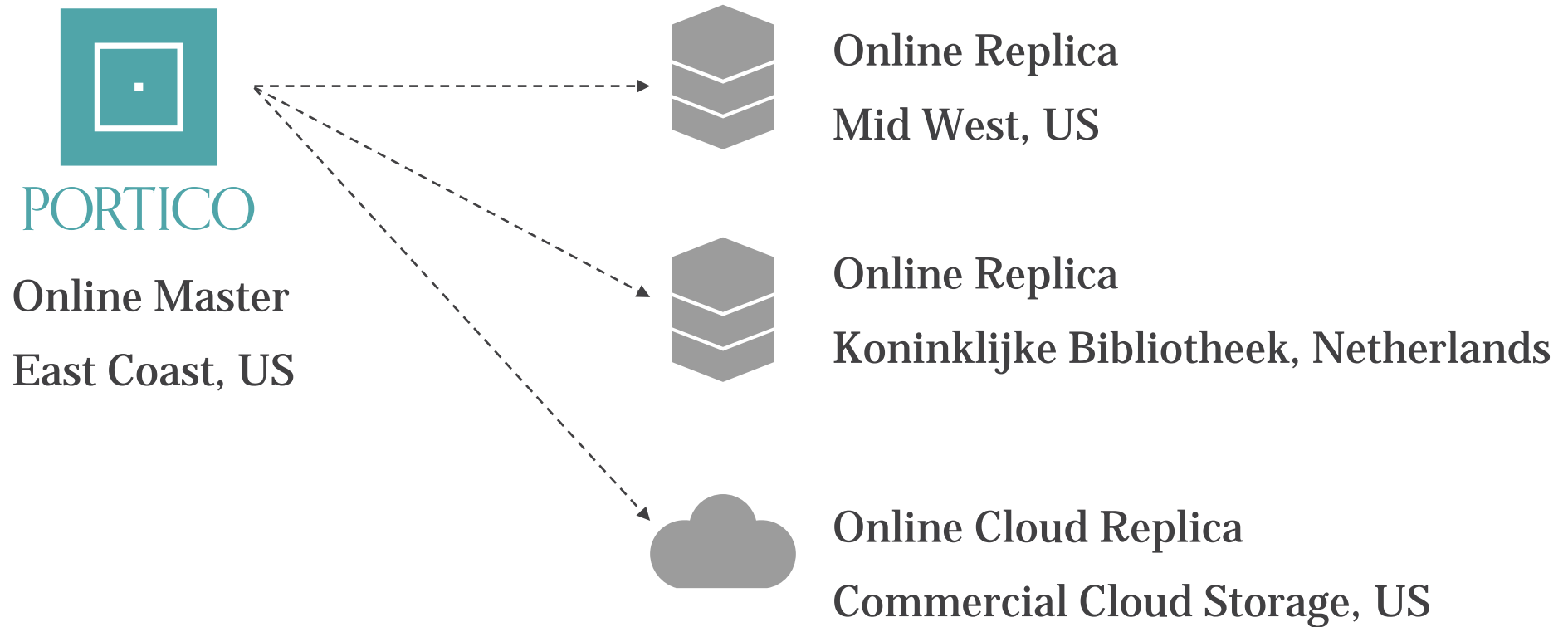
Regular activities:

- Replicate archive
- Perform fixity checks
- Repair or replace content if it becomes corrupted
- Reprocess content as tools are improved
- Deduplicate the archive
- Audit content
- Report on the content to participants
- Refresh hardware
- Monitor the preservation and academic community for changes in preservation needs

As needed activities:

- Validate or revalidate files as new tools are developed
- Migrate files to new formats as necessitated by the changing technological environment
- Update preservation plans
- Receive preservation accreditation

Replication Strategy





Engagement, Partnerships & Projects

Portico in the Community

Portico is engaged with the digital preservation and scholarly publishing communities to ensure we contribute to, share, and learn from the efforts of others.



Our Work with National Libraries

- Since 2013—working with the British Library to Assist with legal deposit of e-content
 - Currently supplying content for 27 publishers
 - 8K journals/more than 5.5M articles delivered
- Long-time partner with the KB (Dutch National Library)
 - collaborated to create digital preservation best practices
 - offline replica of the Portico archive at the KB starting in 2010
 - in 2018 finalized an agreement for them to act as an online replica for the Portico archive

BRITISH
LIBRARY

KB } nationale
bibliotheek





Enhancing Services to Preserve New Forms of Scholarship

Andrew W. Mellon Foundation grant to NYU for collaborative project focused on preservation of enhanced e-books/complex digital scholarship

Scope of Work

- Preservation institutions will test their capabilities for preserving new forms of scholarly works using tools currently available.
- Develop guidelines and best practices to identify material and workflows most likely to lead to successful preservation.

Areas of Investigation

- New formats will include EPUB3 with embedded content, self-contained HTML5; works that include data and software, versioning, user-generated content, external media/code, etc.
- Solutions include emulation as a service and web capture via Web Recorder.

Project Partners



Thank You!

Questions/more info?

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