

Learning by Doing:

Early Operation of the Portico Archiving Service

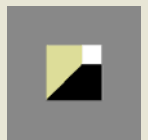
Eileen Fenton  
Executive Director, Portico

CNI  
December 5, 2006



## Portico's Mission

To preserve scholarly literature published in electronic form  
and to ensure that these materials remain available  
to future generations of scholars, researchers, and students.



## Portico's History

- In 2002, JSTOR initiated a project known as the Electronic-Archiving Initiative, the precursor to Portico.
- The goal was to facilitate the community's transition to secure reliance upon electronic scholarly journals by developing a technological infrastructure and sustainable archive able to preserve scholarly e-journals.
- Portico was launched in 2005 by JSTOR and Ithaka, with support from The Andrew W. Mellon Foundation.
- Portico is a not-for-profit organization with a mission and singular focus to provide a permanent archive of electronic scholarly journals.



## Portico's Approach: Content Scope

### In scope:

- Electronic scholarly, peer reviewed journals
- Intellectual content of the journal, including text, tables, images, supplemental files
- Limited functionality such as internal linking

### Out of scope:

- Full features and functionality of publisher's delivery platform
- Ephemeral look and layout of today's HTML rendition of a journal



## Portico's Approach: Migration Supplemented with Byte Preservation

- Publishers deliver “source files” of electronic journals (SGML, XML, PDF, etc.) to Portico.
- Using specialized software Portico converts proprietary source files from multiple publishers to an archival format suitable for long-term preservation. Portico's preservation format is based on the NLM Archiving DTD.
- Source and normalized files are deposited in the archive. Once deposited, content must remain in the archive. To date more than 260,000 articles are archived.
- Portico migrates files to new formats as technology changes.



## Portico's Approach: Access

- Portico offers access to archived content to only those libraries supporting the archive.
- Portico's delivery infrastructure leverages JSTOR's existing technology and investment.
- Access is offered only when specific trigger event conditions prevail **and** when titles are no longer available from the publisher or other sources.



## Portico's Approach: Access

- Trigger events include:
  - When a publisher ceases operations and titles are no longer available from any other source.
  - When a publisher ceases to publish and offer a title and it is not offered by another publisher or entity.
  - When back issues are removed from a publisher's offering and are not available elsewhere.
  - Upon catastrophic failure by publisher delivery platform for a sustained period of time.



## Portico's Approach: Access

- Trigger events initiate campus-wide access for all libraries supporting the archive regardless of whether a library previously subscribed to the publisher's offering.
- Until a trigger event occurs select librarians at participating libraries are granted password-controlled access for archive audit and verification purposes.
- Libraries may rely upon the Portico archive for post-cancellation access, **if** a publisher chooses to name Portico as one of the mechanisms designated to meet this obligation.
- To date 70% of participating publishers have elected this option.





## Sources of Support

- Support for the archive comes from the primary beneficiaries of the archive - publishers and libraries.
- Contributing publishers supply content and make an annual financial contribution ranging from \$250 to \$75,000 depending upon journal revenues.
- To date more than 5,300 journals have been promised to the Portico archive. Participating publishers come from across the spectrum, for example:
  - Elsevier (commercial)
  - Oxford University Press (university press)
  - American Institute of Physics (scholarly society)
  - The Berkeley Electronic Press (e-only publisher)



## Sources of Support

- Libraries make an Annual Archive Support (AAS) payment based upon total library materials expenditures. AAS payments range from \$1,500 to \$24,000 annually.
- All libraries that initiate support for Portico in 2006 and 2007 are designated "Portico Archive Founders" and make a significantly reduced AAS payment.
- To date more than 130 libraries are Portico Archive Founders. Participants range from Grove City College to the University of California system.



## Emerging Themes and Lessons: Publishers

- Publishers understand the library market now demands robust preservation arrangements.
- Publishers want to be a part of the archiving solutions that libraries support.
- Publishers are developing multi-layered strategies.



## Emerging Themes and Lessons: Libraries

- Libraries are actively evaluating the scope of their archival responsibilities and options for meeting these.
- Multi-layered strategies responding to library needs to preserve a wide array of e-content are beginning to emerge.
- Breadth of archival strategy varies with institutional size.
- E-preservation strategies and print collection management strategies can usefully inform one another.



## Emerging Themes and Lessons: Implications

- Libraries should continue to make their preservation needs and preferred strategies known to publishers.
- Publisher and library preservation strategies benefit from being informed by one another.
- Overt communication of archival strategies or intentions assists both parties.



## Emerging Themes and Lessons: Archive Operations

- Like digital preservation, electronic publishing is still evolving. Best practices are still emerging.
  - Publishers' platforms, formats and data structures are shifting.
  - E-journal content is now frequently in 3 formats: current e-formats, early e-formats and digitized print.
  - Archives must be prepared to respond to – and influence - the complexity of this still shifting landscape.



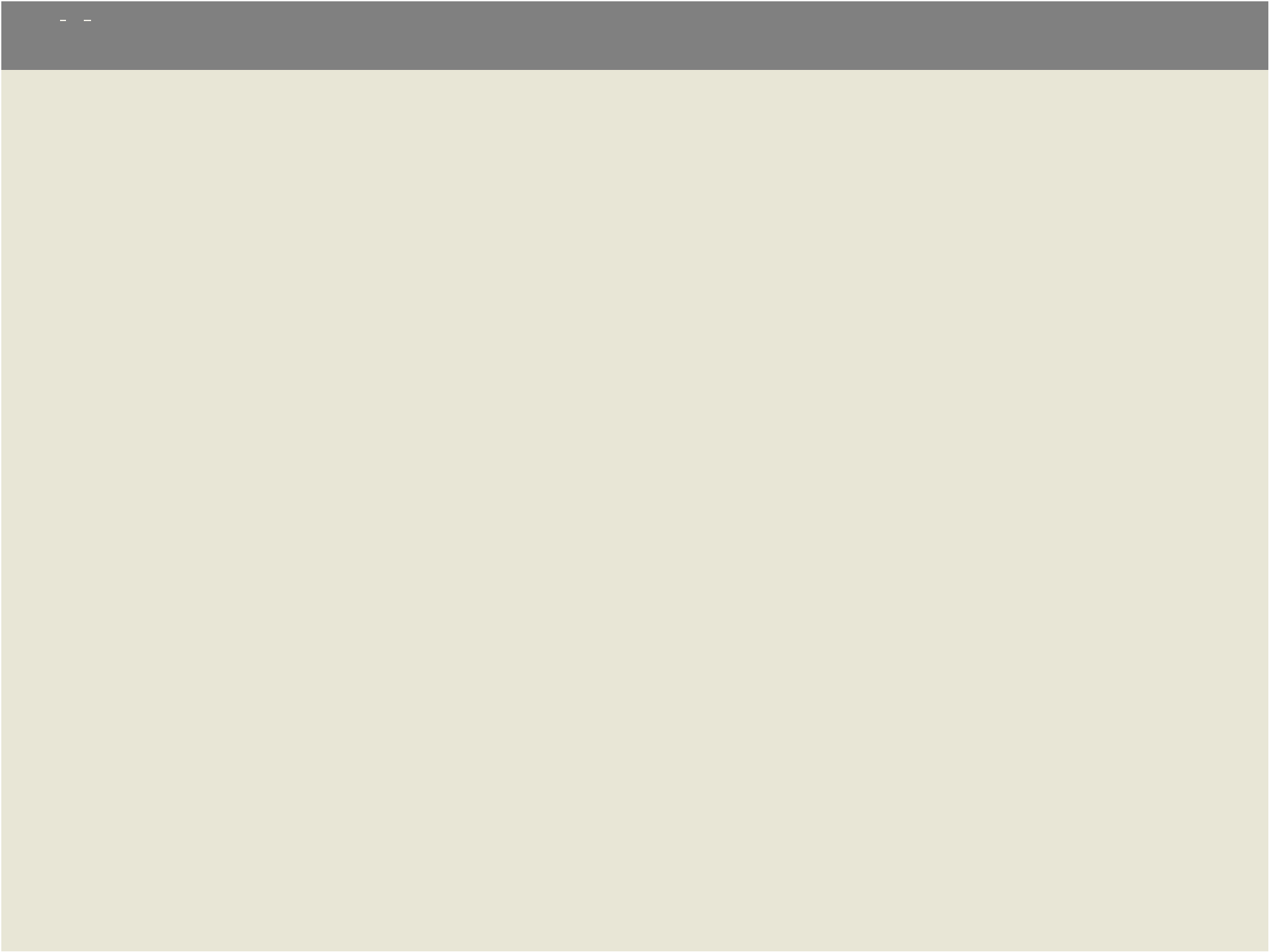
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## Emerging Themes and Lessons: Archive Operations

- Gathering and communicating holdings information is challenging.
  - Publishers do not have readily available publication histories or inventories.
  - Gathering holdings information in a machine-readable way is a challenge.
  - Absent solid holdings data, affirming completeness of the archive is difficult.
  - Communicating holdings data across all interested parties – publishers, libraries, archives – extremely difficult.
  - This is a fruitful and important research area.







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## [Journal of Gene Medicine](#)

Currently published by [John Wiley & Sons, Inc.](#)

**Volume 8, Issue 5, May 2006**

**In this issue**  
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## Article Information

### Bibliographic Information

**Current Journal Title:** Journal of Gene Medicine  
**Compilation Copyright:** 2006; John Wiley & Sons  
**Current Publisher(s):** John Wiley & Sons, Inc.  
**Article Title:** Pharmacologic transgene  
**Author(s):** Wilfried Weber, Martin Fu  
**Citation:** Volume 8, Issue 5, May 2  
**Publisher Copy:** [10.1002/jgm.903](#)

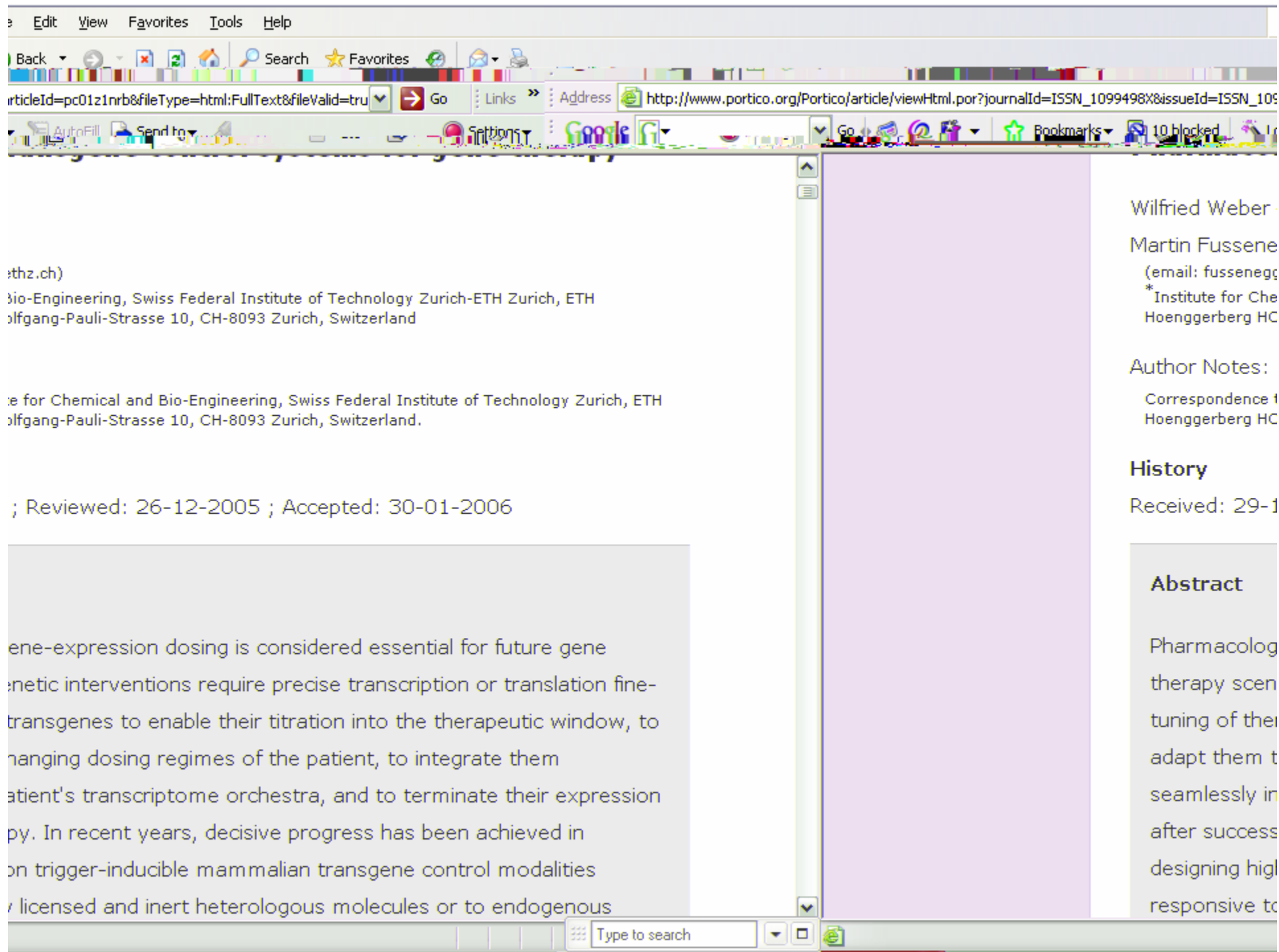
### Archival Information

**Archival Identifier:** ark:/27927/pc01z1nrb  
**Content Type:** E-Journal Content  
**Content Set:** ISSN: 1099498X, E-ISSN  
**Available Renditions:** [HTML](#) (Full Text) | [PDF](#) (3

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xpression; viral vector; gene regulation

631-065946; Swiss National Science Foundation

EC Framework 6; Swiss State Secretariat for Education and

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Cistronics Cell Technology GmbH

**Keywords**

Geneswitch; in

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**Introduction**

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Destinations [140] and Food and Admin [141]

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insgene regulation systems was supported by the Swiss National  
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network 6, and Cistronics Cell Technology GmbH, Einsteinstrasse 1-5,  
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Acknowledge**

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CH-8093 Zurich

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