

Preserving State Government Digital Information Minnesota Historical Society

Preservation Factors to Consider

The following are some main factors to consider when exploring preservation options. Use these questions to help determine if the repository you are considering will meet your current and projected future needs.

As when evaluating any system, it is helpful to identify use cases and determine if the system meets them at an acceptable level. Only then will you know which system will best fulfill your needs.¹

NOTE: This list is not complete as all organizations have individual requirements and available resources; however, the major concepts of access and ownership, costs, and aspects of the system itself are addressed.

Documentation

- What documentation is available about the system?
- Where is this documentation located?
- Is it readily available?
- Do you understand it?
- If desired, do you have access to the programming code driving the repository?

Access and Ownership Issues

- Consider how you hope to use the system.
 - Will the archive serve as a preservation repository?
 - Will the archive provide an access point to material?
 - Will the archive provide a secondary access point to material?
- Who has access to the records?
- Can you restrict access to master copies? For example, could access to high-level vs. low-level resolution images be differentiated?
- Who owns the content in the repository? Do you keep ownership of the content, or would the repository share or control the ownership?

¹ The Minnesota Digital Library Preservation Project has also been studying aspects of preservation repositories and is developing a similar matrix for evaluating repository options. Project Home Page February 13, 2012: <http://www.mndigital.org/projects/preservation/>

User Interface

- What type of interface is used to interact with the system? Is it web-based? Something else?
- If it is web-based, is a particular browser preferred or required for use?
- How can the system be accessed? Can it be accessed from anywhere or only certain locations?
- Is the interface easy to understand and use? Or, will users need to undergo moderate to extensive training to use the system?
- Consider how users interact with the records.
 - How do users find records?
 - Are there various entry points to records?
 - What types of search capabilities are available?
 - What types of search can be performed?

Depositing Material

- What formats does the system accept? Will files need to be reformatted before depositing?
- What metadata is required? Do you have this readily available?
- Can you customize or add to any required metadata? Are metadata-wrapped objects acceptable?
- How do you deposit material? Do you transfer files via hard driver or is there a web interface?
- What types of submission are possible (individual, batch)?
- How much work will need to be done in order to make objects ready for submission?

Managing Records in the Repository

- What record management services are available?
 - Can materials be updated?
 - Can materials be deleted?
 - Can rights to materials be restricted? How? By collection? Item? High-vs. low-resolution?
 - Can materials be removed automatically (based on retention schedules or other requirements)?
- What reporting functions are available?
 - Are there inventory reports available (e.g. number of collections, objects, etc...)
 - Is there an internal monitoring system present and accountable?
 - Are system and/or record audit reports available upon demand?
- Does the system have a method to handle version control?
 - What information is recorded about versions?

- Does it capture everything you need it to?
- Does it store new copies alongside old copies?
- Does the process flow smoothly or is a lot of work necessary to do this?
- Does the system have a way to relate files? Or combine related files?

Access to and Retrieval of Files

- How do people have access to the files?
- Who has permission to access the files?
- What types of or levels of permissions are available for different types of users?
- What methods are available for retrieval?
- Can files can be retrieved and downloaded? Can this be done for individual files and/or a in batch process? Can particular files be selected for retrieval?
- What is the complexity of content retrieval? What level of effort is required for retrieval?

Preservation

- What preservation methods are in place?
- How many copies are maintained in the archive?
- Does the system reliably monitor itself?
- Are formats migrated as necessary for preservation?
- Are older versions of material preserved in addition to migrated copies?
- Is there reliable bit preservation?
- Is there reliable metadata preservation?
- How are backups handled?
- What methods are in place to help monitor preservation activities?

Costs

- What is the general cost structure or pricing plan?
 - What is the annual cost?
 - What is the pricing system? Cost per item? Cost per gigabyte? Other?
- Is there a cost for the retrieval of objects?
 - How is this structured? By number of files, size, number of times per/month?
- What are the internal costs of staff to manage preparation, storage, and retrieval of records?
- How long is the contract?
- How predictable is the cost over time?
- What additional services are available from the repository? How are these costs determined?
- What types of customer service plans are available? How are these costs determined?