Digital Content Review -- Lifecycle Report Outline

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This document provides an outline for constructing a Lifecycle Report at ICPSR and offers a step towards identifying the core components of a Lifecycle Report to encourage common community practice for creating content review documents. The Lifecycle Report should not exceed 5-6 pages, not including appendices. The Lifecycle Report should reflect the results of an explicit environmental scan of the digital preservation community and other relevant sources specific to the digital content type.

Common Components for Lifecycle Reports

Lifecycle Report: [insert digital content type]
Prepared by: [insert name, title]
Date created: [insert date of first version or date of current draft until version 1]
Date last revised: [always enter date of last revision]

I. Overview

1. Document Structure
This section discusses how the document is organized and identifies the major sections of the report. The sections include an Overview providing a high level view, a section on the Implications for Lifecycle Stages that examines the considerations affecting the content type as it passes through distinct phases of the lifecycle, a section on Lifecycle-wide Implications that focuses on considerations affecting the content type throughout the lifecycle, and a section comprised of Appendices (if needed).

2. Background and Recommendations
This section includes a definition of the digital content type and a brief outline of how the content type was handled and processed in the past. The overview section concludes with a summary of long and short term recommendations.

II. Implications for Lifecycle Stages

1. Selection
Definition: This section provides a general summary of the digital content type. This section also identifies if any versions of the digital content type is covered in other Lifecycle Reports (e.g. a Qualitative Data Lifecycle Report may include a statement that qualitative data in the form of video are addressed in the Video Lifecycle Report).
Criteria: This section includes a statement of the current (if any) selection criteria in place at the institution, and a selection criteria recommendation for the digital content type.
Potential deposits: This section is based on an in-house survey to determine current and future deposits of the digital content type. The number of deposits, type of data, and the predicted trend of deposits of the content type are also included.

2. Deposit review and acceptance
Deposit Process: This section identifies any changes needed to the deposit process to accommodate the content type (e.g. a Qualitative Data Lifecycle Report may include a
statement requesting a field be added to the deposit form that indicates whether the data are quantitative, qualitative, or mixed, etc.).

Review: This section discusses the review process for the digital content type, including the completeness, documentation, sensitivity, detail, and possible access issues inherent in a submission. Any other challenges or possible future difficulties with the content type should be noted as well.

[Insert content type] Advisory Board: A standing [insert content type] board should be convened as needed to review potential deposits and address issues pertaining to processing, preserving, or making the content type available.

3. Processing

Training: This section includes a high-level outline of the personnel and procedures that will be involved in processing training for the content type.

Processing Workflow: A workflow for processing the content type is outlined in this section. If deposits of the content type will be relatively homogeneous (same relative size, content, etc.), a detailed outline can be included. If the deposits of the content type are heterogeneous, this section may only include a statement that a detailed plan should be created for each deposit of the content type.

Confidentiality: stresses the incorporation of measures to ensure confidentiality during processing of the content type.

Metadata: Specific instructions covering metadata creation and handling for the content type.

4. Access

Confidentiality: This section identifies any confidentiality issues associated with access to the content type. Any known or anticipated access restrictions are also noted.

Technical Issues: Any technical challenges or limitations associated with the content type (e.g. the use of proprietary formats is an access issue for qualitative data, as is file size for video).

Access Fees: Recommends the creation of user fees for expensive delivery procedures (e.g. making a DVD for delivery of video formats).

5. Preservation

Formats: This section recommends the types of formats best suited for the preservation of the content type. Any issues associated with creating these formats are also included.

Metadata: This section identifies what challenges may arise in the creation of metadata for the content type, and recommend a metadata type/schema where appropriate.

Preservation of confidential content: This section discusses any issues that may arise with the long term preservation of confidential data, and solutions to these issues (e.g. encryption, access restrictions, time-related identifiers, etc.).

Storage: Challenges in long-term storage of the content type (e.g. storage and backup space for very large files).

III. Lifecycle-wide Implications

1. Copyright

This section details copyright issues inherent in the content type. It also enumerates recommendations for the institution to mitigate risk associated with copyright and any recommended procedural changes, especially those related to ingest.

2. Tools
This section outlines special tools that are required to process, maintain, and deliver the content type. A discussion of the cost of associated software licensing and/or equipment costs is also included (e.g. video requires the conversion of analog formats to digital formats, as well as the equipment to complete this conversion).

3. Project management and costs

Project Management: This section identifies where management of the content type resides within the organization (e.g. centralized or distributed).

Processing Levels: The level of effort/time to devote to the processing of a content type balanced against the cost of processing. This balance may be defined for the content type as a whole, or defined to accommodate different levels of processing for different deposits of the content type (e.g. defining processing levels for video content from minimal processing to very intensive processing with edit lists and extensive metadata annotations).

Monitoring: This section outlines the need for an ongoing scan for new technologies, tools, best practice, funding, intellectual, and ethical considerations associated with the content type. The identification of staff to complete this scan may also be included.

Time allocation: This section identifies how much time processing may take, and identifies what factors could increase this time (e.g. extremely sensitive or detailed data will add to processing time).

Resources: A recommendation for any resources (e.g. publications, manuals, etc.) that should be created for the content type.

Appendices
One or more of the above sections may refer to an appendix with more detailed information regarding any aspect of the digital content type lifecycle.