

# Digital Preservation Coalition

## Interactive Assessment: Selection of Digital Materials for Long-term Retention

[www.dpconline.org/handbook/dec-tree.html](http://www.dpconline.org/handbook/dec-tree.html)

**Selection** > **Rights & Responsibilities** > **Technical / Costs** > **Documentation & Metadata / Costs**

**Selection > Rights & Responsibilities > Technical / Costs > Documentation & Metadata / Costs**

**SELECTION OF VERSION AND CONTENT**  
**Selection 1**  
 Does the content of this resource fall within the institutional remit/collection development policy?  
 YES Go to S4      NO Go to S2

**SELECTION OF VERSION AND CONTENT**  
**Selection 2**  
 Does assessment of long term value justify preservation?  
 YES Go to S4      NO Go to S3

**Help with Selection 2**  
 Decisions on long-term value will include consideration of the following:  
 Is there a legal requirement associated with the material?  
 • Is the material of high value to your institutions' business/mission?  
 • Is the information content of high quality?  
 • Do you have or can you negotiate acceptable access arrangements?  
 • Could it reasonably be considered to be an important example of its type?  
 • Is it likely to be required for future research?  
 Answering 'yes' to one or more of the above questions should automatically mean selection for long-term preservation if no one else has accepted preservation responsibility.

**SELECTION OF VERSION AND CONTENT**  
**Selection 4**  
 Does the resource exist in multiple media formats (e.g. print and digital)?  
 YES Go to S5      NO Proceed to Rights and Responsibilities

**SELECTION OF VERSION AND CONTENT**  
**Selection 3**  
 Do you need to acquire for other purposes, e.g. reference?  
 YES **See Advice 2**      NO **See Advice 1**

**Advice 1:** Don't acquire.  
**Advice 2:** Acquire for use but not preservation.  
 For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

**SELECTION OF VERSION AND CONTENT**  
**Selection 5**  
 Should the digital version be selected for preservation?  
 YES Proceed to Rights and Responsibilities      NO **See Advice 2**

**Help with Selection 5**  
 Decisions will include consideration of the following factors:  
 • Predicted preferred format of users;  
 • Technical considerations regarding ease of use and ability to maintain over time;  
 • Whether the resource is required short-term only;  
 • Whether there are significant variations between formats for them to be considered different versions.  
 • Whether functionality of one version offers greater scope for use.

**Advice 2:** Acquire for use but not preservation.  
 For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

**RIGHTS AND RESPONSIBILITIES**

**Rights 1**

Does acquisition automatically confer a preservation responsibility (e.g. legal deposit acquisition /evidential requirements) ?

**YES**  
Go to R4

**NO**  
Go to R2

**Help with Rights 1**

See: 2.2.2 *Organisational issues: Roles* on the DPC website at <http://www.dpconline.org/graphics/digpres/presissues.html#roles1>

**RIGHTS AND RESPONSIBILITIES**

**Rights 2**

Has preservation responsibility been accepted elsewhere?

**YES**  
Go to R3

**NO/Don't Know**  
Go to R4

**RIGHTS AND RESPONSIBILITIES**

**Rights 3**

Do you require a higher degree of preservation commitment or access to this resource than offered elsewhere?

**YES**  
Go to R4

**NO**  
See Advice 2

**Help with Rights 3**

If preservation responsibility has been accepted elsewhere, decisions on whether you might also wish to take on preservation responsibility will include consideration of the following:

- Has preservation responsibility been undertaken only for the short-term?
- Does the infrastructure of the organisation elsewhere pose any doubts as to the ability to guarantee long-term access to the resource?
- Are there any access conditions imposed which your organisation would consider unacceptable?
- Has responsibility elsewhere been taken only to mirror the resource, i.e. to provide access but not necessarily to guarantee long-term preservation?

**Advice 2:** Acquire for use but not preservation.  
For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* on the DPC website at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

**RIGHTS AND RESPONSIBILITIES**

**Rights 4**

Do you have (or can you negotiate) acceptable arrangements for acquisition and/or transfer, including frequency of ingest appropriate to the resource and your business model?

**YES**  
Go to R6

**NO**  
Go to R5

**Help with Rights 4**

See: 3.4 *Rights management* on the DPC website at <http://www.dpconline.org/graphics/instrat/rights.html>

**RIGHTS AND RESPONSIBILITIES**

**Rights 5**

Re-evaluate acquisition. Is the resource worth acquiring and preserving even if there are undesirable restrictions on accepting the material?

**YES**  
Go to R6

**NO**  
See Advice 3

**RIGHTS AND RESPONSIBILITIES**

**Rights 6**

Do you have (or can you negotiate) the rights to transfer to different carriers and/or different formats for the purposes of preservation?

**Yes**  
Proceed to Technical/Costs

**NO**  
See Advice 3

**Advice 3:** Acquire the resource but document that long-term preservation may not be feasible.  
For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* on the DPC website at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

**TECHNICAL**  
**Technical 1**  
 Is the resource in a file format you can manage now and in the future, or can you negotiate for the source to supply the resource in a manageable file format?  
YES  
 Go to T3

**Help with Technical 1**  
 See: 5.2 File formats and standards on the DPC website at <http://www.dpconline.org/graphics/medfor/formats.html>

**TECHNICAL**  
**Technical 2**  
 Is it technically feasible for you to transfer the material to a more manageable file format?  
YES  
 Go to T3

**TECHNICAL**  
**Costs 1**  
 Are you willing and able to accept the costs and risks of trying to manage the resource in this file format?  
YES  
 Go to T3

**Help with Costs 1**  
 See: 2.1 Strategic Overview: How much does it cost? on the DPC website at <http://www.dpconline.org/graphics/digpres/stratoverview.html#how2>

**TECHNICAL**  
**Technical 3**  
 Is the resource available to you online or on a physical carrier?  
Online  
 Go to T4

**Advice 3:** Acquire the resource but document that long-term preservation may not be feasible. For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* on the DPC website at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

**TECHNICAL**  
**Technical 4**  
 Are you able to collect or receive the resource via a suitable and secure method (i.e. to acquire a copy of the resource not just access rights to their copy)?  
Yes  
 Go to T5

**TECHNICAL**  
**Technical 5**  
 Can you store and manage the material with a suitable online or offline storage and management system including enough available storage space?  
YES  
 Proceed to Documentation

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**TECHNICAL**

**Costs 2**

Is it cost effective for you to develop an online or offline storage and management system?

**YES**  
Proceed to Documentation

**NO**  
See Advice 3

**Help with Costs 2**

See: 2.1 Strategic Overview: How much does it cost? on the DPC website at <http://www.dpconline.org/graphics/digpres/stratoverview.html#how2>

**Advice 3:** Acquire the resource but document that long-term preservation may not be feasible.

For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* on the DPC website at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

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**TECHNICAL**

**Technical 6**

Is the resource on a carrier that is acceptable for transfer and/or storage, or can you negotiate for the source to supply an acceptable carrier?

**YES**  
Proceed to Documentation

**NO**  
Go to T7

**Help with Technical 6**

See: 5.1 Media on the DPC website at <http://www.dpconline.org/graphics/medfor/media.html>

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**TECHNICAL**

**Technical 7**

Is it technically feasible for you to transfer the resource to an acceptable carrier?

**YES**  
Go to Costs 3

**NO**  
Go to Costs 4

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**TECHNICAL**

**Costs 3**

Is it cost-effective for you to transfer the resource to an acceptable carrier?

**YES**  
Proceed to Documentation

**NO**  
Go to Costs 4

TECHNICAL

**Costs 4**

Are you willing and able to accept the costs and risks of trying to manage the material on this carrier?

**YES**  
**Proceed to**  
**Documentation**

**NO**  
**See Advice 3**

**Advice 3:** Acquire the resource but document that long-term preservation may not be feasible.

For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* on the DPC website at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

**Help with Costs 4**

Assessment of the cost-benefit of reformatting standard storage media will vary from institution to institution. The following issues indicate factors which may be taken into account before deciding whether it is cost-effective:

- Stability of format (e.g. optical disks tend to be more stable than floppy disks\*)
- Storage capacity of the media
- Volume of material
- Ease of access if high use is anticipated.
- Copyright. Whether permission has already been received from the owner to reformat to other offline or online storage.
- Operational considerations (e.g. it may be more efficient to re-format all onto a common carrier rather than selecting only certain categories)

\*For advice on reformatting floppy disks see *“Practical Advice for Preserving Publications on Disk”*, 1999, <http://www.nla.gov.au/nla/staffpaper/woodyard2.html>  
See also: *National Archives UK, Digital Preservation Guidance Note 2: Selecting Storage Media for Long-Term Preservation (PDF) Jun 2003*  
[http://www.nationalarchives.gov.uk/preservation/advice/pdf/selecting\\_storage\\_media.pdf](http://www.nationalarchives.gov.uk/preservation/advice/pdf/selecting_storage_media.pdf)

See also:  
*2.1 Strategic Overview: How much does it cost?*  
on the DPC website at  
<http://www.dpconline.org/graphics/digpres/stratoverview.html#how2>

Selection > Rights & Responsibilities > Technical / Costs > Documentation & Metadata / Costs

**DOCUMENTATION & METADATA**

**Documentation 1**

Has sufficient documentation been supplied (including metadata)?

**YES**  
See Advice 4

**NO**  
Go to D2

**Help with Documentation 1**

See: 4.4 Metadata and Documentation on the DPC website at <http://www.dpconline.org/graphics/orgact/metadata.html>

**Advice 4:** Acquire the resource for long-term preservation.

For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* on the DPC website at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

**DOCUMENTATION & METADATA**

**Documentation 2**

Can you negotiate for the source to supply the required documentation?

**YES**  
See Advice 4

**NO**  
Go to D3

**Help with Documentation 2**

Consider development of guidelines. See "Information on depositing digital resources with the AHDS", April 2004, <http://www.ahds.ac.uk/depositing/index.htm> for an introduction to suggested best practice, including the "AHDS Data and Documentation Transfer Form", November 2003, <http://www.ahds.ac.uk/depositing/how-to-deposit.htm>

**Advice 4:** Acquire the resource for long-term preservation.

For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* on the DPC website at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

**DOCUMENTATION & METADATA**

**Documentation 3**

Is it technically feasible for you to construct the required documentation?

**YES**  
Go to Costs 5

**NO**  
Go to D4

**DOCUMENTATION & METADATA**

**Costs 5**

Can you commit adequate staff resources to construct the required documentation?

**YES**  
See Advice 4

**NO**  
Go to D4

**Help with Costs 5**

See: 2.1 Strategic Overview: How much does it cost? on the DPC website at <http://www.dpconline.org/graphics/digpres/stratoverview.html#how2>

**Advice 3:** Acquire the resource but document that long-term preservation may not be feasible.

**Advice 4:** Acquire the resource for long-term preservation.

For further help in developing a policy on selection of digital materials for long-term preservation please go to *Guidance* on the DPC website at <http://www.dpconline.org/graphics/handbook/dec-tree-end.html>

**DOCUMENTATION & METADATA**

**Documentation 4**

Is the material so valuable that you will accept it without adequate documentation?

**YES**  
See Advice 4

**NO**  
See Advice 3