Step Zero – Creating a Preservation Inventory

This quick guide will help you think broadly about all the content created by your publishing unit, whether it is available for the public or only internal, and whether it is meant to be retained for the long term or is more ephemeral. It is part of ***a series of short guides****, created by LPC's Digital Preservation Working Group, intended to support the community of library publishers in preservation activities.*

Why do an inventory as the first step in a digital preservation workflow?

- Inventorying is exploration. It's an illumination into your current practices and your past endeavors.
- Inventorying is needed to answer the question: What's under the publishing house's umbrella? An inventory is a snapshot in time.
- Inventorying is needed to understand: What do you have? When you consider your portfolio at this high level, what similarities and differences do you immediately start to consider?
- Remember that everything inventoried will not be preserved nor treated in the same way. This is a necessary step needed to determine what materials rise to the level of requiring preservation.

What kinds of documents are included in an inventory?

- Formally published materials such as:
  - Journals (and journal articles), monographs, textbooks, Digital Humanities (DH) projects, bibliographies
- Supplemental materials such as:
  - Datasets
  - Audiovisual materials & their transcripts
- Internal supporting documents such as:
  - MOUs/MOAs with partners
  - Licensing agreements between publishers (or publications) and creators. This includes both affiliated partners and external creators when content (such as images) is reused by our publications.
  - Production files (i.e., drafts, InDesign files, etc.)
  - Rejected manuscripts
  - Peer reviews and communication from editors to authors

What kind of information do we want to capture in an inventory?

- Depending on whether the documents are formally published, supplemental, or internal, different information will be needed.
- Are there permissions associated with documents? For example, are they available only internally? Only to campus affiliates or on-campus users? Open access?
- Why do you keep these materials currently? (As in, needed for public access, potential legal dispute resolution, disaster recovery need, ease of cross-walking a publication to a new platform, going to university archives, etc.)
- Are the materials digital or physical? Are they born-digital or digitized?
- Where are the documents (and any copies) located? Consider that there may be multiple copies in different locations.
    - Different considerations are needed for physical versus digital items
    - Who maintains the documents and their storage? (i.e., someone's local machine, library infrastructure, externally managed storage, or something else entirely?)
- What digital platforms are being used to enable the production or distribution of the content? (e.g., OJS, Janeway, bepress, YouTube, Vimeo)
- What formats are the documents in? (e.g., PDF, HTML, EPUB/XML)
- How are the works licensed?
- Are there identifiers associated with these works, such as ISSNs or ISBNs?

Inventory Template

- Make a copy of this spreadsheet and use it to inventory your files.
- You may want to think about your publications at broad levels, such as by platform or format, or you may wish to think of them title by title. There is no one way to do this; it is a tool for you to think about what you have, and you should adjust it in ways that make sense for your publishing program. Rearrange the rows as needed and make as many copies as you need to structure the inventory in a way that makes sense to you.
- You may also want to identify things you explicitly do not want to retain.

Next Step

Continue on to **Step One: Understanding the Preservation Landscape**, which you can access via the **full list of guides**.

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