1 Introduction

The Digital Repository Service (DRS) is the Harvard Library’s centrally-supported technical service platform for the long-term preservation of, and access to, the University’s rich and often unique digital collections. Digital preservation is a complex of people, policies, procedures, and technologies that ensure the ongoing archival integrity, authenticity, accessibility, and usability of digital content across time and accompanying technical and cultural distance. Business ownership of the DRS is exercised by the Digital Preservation Services team (DPS) of HL Preservation Services (HLPS).¹ Technical and operational control is the responsibility of HUIT Library Technology Services (LTS).²

1.1 Purpose and Scope

This Guide provides information useful to Library and University content curators for the effective stewardship of their digital collections in the DRS. In this context, “curator” should be interpreted expansively to encompass anyone – librarians, archivists, curators, collection managers, and others – exercising significant intellectual or administrative control or oversight over digital collections contributed to, preserved in, or accessed from the DRS.

The Guide is a living document; over time, it will be expanded to include pertinent discussion of all considerations of curatorial interest and concern across the full lifespan of stewarded digital collections.

1.2 Glossary

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>CM</td>
<td>Content model</td>
</tr>
<tr>
<td>CoA</td>
<td>Chart of Accounts</td>
</tr>
<tr>
<td>DPS</td>
<td>HLPS Digital Preservation Services</td>
</tr>
<tr>
<td>DRS</td>
<td>Digital Repository Service</td>
</tr>
<tr>
<td>HL</td>
<td>Harvard Library</td>
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<tr>
<td>HLPS</td>
<td>HL Preservation Services</td>
</tr>
<tr>
<td>HRCI</td>
<td>High-risk confidential information</td>
</tr>
<tr>
<td>HU</td>
<td>Harvard University</td>
</tr>
<tr>
<td>HUIT</td>
<td>Harvard University Information Services</td>
</tr>
<tr>
<td>LTS</td>
<td>HUIT Library Technology Services</td>
</tr>
</tbody>
</table>

¹ https://preservation.library.harvard.edu/digital-preservation
² https://staff.library.harvard.edu/lts
2 What Is (and Isn’t) the DRS?

The DRS is the core component of an evolving ecosystem of technical and service infrastructure (see Figure 1) for the effective, efficient, and sustainable long-term stewardship and preservation of the University’s deep, broad, and often unique digital collections.

![Figure 1 – Digital Repository Service ecosystem](image)

All of these individual components have been carefully designed and implemented to provide a seamless online experience. However, they are subject to distinct product ownership, governance, and support regimes. The core DRS system is the joint responsibility of DPS (business ownership) and LTS (technical and operational ownership). The systems supporting DRS deposit and mediated access are outside the strict boundaries of the DRS and the business ownership responsibility of DPS. However, DPS does consult and collaborate routinely with the responsible HL and LTS units regarding those external systems’ operation and future direction.

2.1 Modeling Digital Content

The primary unit of DRS managerial attention is the digital object, an intellectual or aesthetic work with coherent cognitive or affective meaning.\(^3\) An object is an abstract content-containing entity that is tangibly represented by one or more files each capturing, presenting, or describing some significant aspect of the parent object (see Figure 2). All digital objects and their constituent files managed in the

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\(^3\) The term “work” is adopted here from the IFLA Library Reference Model (LRM), which encompasses and extends the IFLA Functional Requirements for Bibliographic Records (FRBR) conceptual model (Riva et al., 2017).
DRS receive the highest level and longest term of preservation service consistent with:

1. Their intrinsic and extrinsic characteristics
2. Their curatorially-appraised value, as determined by:
   (1) Intellectual, aesthetic, historical, artifactual, evidential, and economic importance as may persist or evolve over time
   (2) Ubiquity or uniqueness
   (3) Risk of damage or loss
   (4) Ease or difficulty of re-creation or reacquisition
   (5) Alignment with HL and University collection development policies and priorities
3. Relevant DPS and LTS expertise and programmatic capacity
4. Competing demands of other HL and LTS priorities

These factors are not constant, but rather, may fluctuate during the service term of managed DRS content.

![Figure 2 – DRS content modeling hierarchy](image)

### 2.2 Content Aggregation

In addition to the digital object/file data modeling hierarchy described in Section § 2.1 (see Figure 2), the DRS supports two broader mechanisms for content aggregation identified in terms of owner codes and billing codes. An owner code represents the responsible agency for persistent administrative and curatorial control and obligations. Similarly, a billing code represents the responsible agency for financial control and obligations. A given DRS-managed digital object and its constituent files are associated with a single owner at any point in time. These associations can be updated through the DRS Web Admin interface, as described in the Web Admin User Guide (Harvard Library Information)...
Technology, 2017b), to reflect changes in administrative or curatorial conditions. In general, owner codes are requested and assigned at the level of a contributing HL or other HU administrative repository or unit. However, codes can be requested at finer granularity to reflect legitimate curatorial and administrative needs. Within the umbrella of a given owner code, multiple billing codes can be established. A given DRS-managed object and all of its constituent files are associated with a single billing code at any point in time. Again, this association can be updated to reflect changing financial needs. The primary purpose of billing code aggregations is to support the DRS’s quarterly cost-recovery billing, as described in Section § 6. For this purpose, each billing code is associated with an owner-designated 33-digit Chart of Accounts (CoA) code.

3 Curatorial Roles, Privileges, and Responsibilities

The privileges and responsibilities of curators are distributed across five roles (see Table 1):

<table>
<thead>
<tr>
<th>Role</th>
<th>Scope</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Director</td>
<td>Owner code</td>
<td>The administrative head of the University or HL unit associated with a given owner code</td>
</tr>
<tr>
<td>2. Director proxy</td>
<td>Owner code</td>
<td>Optional contact with authority to act in lieu of an owner code’s director</td>
</tr>
<tr>
<td>3. Owner</td>
<td>Owner code</td>
<td>The primary curatorial contact for the owner code</td>
</tr>
<tr>
<td>4. Billing contact</td>
<td>Billing code</td>
<td>The primary billing contact for a billing code</td>
</tr>
<tr>
<td>5. Project contact</td>
<td>Billing code</td>
<td>Additional optional contacts receiving DPS communications regarding the billing code</td>
</tr>
</tbody>
</table>

Table 1 – DRS curatorial roles

More information about the scope and responsibilities of DRS roles is outlined in the DRS Web Admin User Guide. It is important that contact information for these roles is maintained in an up-to-date fashion to ensure appropriate and timely messaging between DPS and curators. If you have an online account with the DRS Web Admin, you can make updates directly following the instructions in the User Guide. Otherwise, you can submit a ticket to the DRS Support Team to make the changes on your behalf, following the directions outlined on the LTS support website. Curators will receive a periodic reminder to review and revise as necessary role assignments and contact information prior to the quarterly DRS billing cycles describe in Section § 6.

Collectively, the various curatorial roles exercise various administrative, financial, intellectual, and legal obligations regarding their content, including:

1. Creation or acquisition and description of digital objects in the most preservation-amenable

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4 https://wiki.harvard.edu/confluence/x/wYleC  
5 https://wiki.harvard.edu/confluence/x/AopeC  
6 https://harvard-lts.libanswers.com/drs/faq/374206
form practicable.

2. Curatorial appraisal and selection for deposit of those objects conforming to professional collection development best practices, HL policies and priorities, and DRS eligibility and appraisal criteria as introduced in Section § 4.

3. Timely payment of fees assessed for preservation stewardship of objects under the DRS cost model, as discussed in Sections § 5.2 and § 6.

4. Deaccessioning objects and files from the DRS only as the result of analysis conforming to professional collection development best practices and HL policies and priorities, or to remedy obvious errors affecting representational or functional integrity or authenticity.

An inability or unwillingness to meet these obligations may result in the re-designation of ownership and curatorial responsibilities or deaccessioning of affected objects at the discretion of DPS managers.

4 Content Acquisition

The single most important event in the successful long-term stewardship of a digital object is its submission to and acceptance by a responsible proactive program of preservation management. While preservation success is not a guaranteed outcome of such management, preservation failure – including potentially irretrievable damage or loss of data integrity, authenticity, accessibility, or usability – is almost certainly the inevitable result of an absence of that management. Consequently, DRS policy and operational guidelines explicitly promote the most open, expansive, and inclusive opportunities for object submission.

4.1 Eligibility

Any digital object of persistent value supporting the University's research, teaching, and learning mission as well as its ongoing administrative operation is eligible for contribution to and management in the DRS. Objects may be contributed by any University organizational unit or individual affiliate. In the latter case, that affiliate must ensure an express acceptance of controlling administrative responsibility for the objects by some organizational unit. This requirement is necessary to ensure continuity of appropriate curatorial oversight over time. The absence of such oversight may significantly impede efforts towards successful long-term stewardship and preservation.

The DRS operates on a partial cost-recovery basis, under which contributing or overseeing units are billed quarterly for the amount of storage capacity used, as described in Section § 6. Submission of objects to the DRS implicitly constitutes affirmative acceptance of the obligation to fulfill the financial responsibilities defined by the DRS cost model (Harvard Library, 2022b).

As defined in the DRS Policy Guide (Harvard Library, 2020), object eligibility also depends upon:

1. Conformance to the requirements and recommendations of DRS content models, as discussed in Section § 4.4 (Harvard Library, 2019).

2. Accompanying description (metadata) at a curatorially-appropriate level of detail at the time at which the object is made available for public access.
3. HL holding, or being granted in good faith, legitimate legal authority to store, copy, make derivatives, and redistribute the object subject to reasonable curatorially-designated access control rules.

The second criteria permits objects to be submitted and accepted with minimal accompanying metadata. This may be the case, for example, for objects that are still being actively processed or which are currently embargoed or otherwise unavailable for immediate patron delivery. However, metadata supportive of effective use of the objects must be provided whenever there is an expectation of public or restricted patron retrieval for use.

As noted above, the DRS is purposefully inclusive regarding the objects and files that it can accept. Note, however, that specific details regarding the form, structure, and description of a given digital contribution may impinge on the degree of its positive preservation outcomes as well as any future ability to render and (re)use. In cases where curators have discretion regarding the technical conditions of acquisition or creation of collections, DPS is available for consultation and recommendations on ways to ensure that those collections are most amenable to successful long-term outcomes.

4.2 Appraisal

Some of the critical factors that should be taken into account during curatorial appraisal of objects under consideration for deposit in the DRS include:

1. Curatorial mission and collection development policy
2. Inherent or imputed intellectual, aesthetic, historical, evidentiary, and economic value
3. Statutory, regulatory, or contractual obligations
4. Degree of ubiquity or uniqueness
5. Degree of ease or difficulty of reacquisition or re-creation
6. Sensitive information content and potential attendant harm from inappropriate access
7. Sustainable stewardship elsewhere by trustworthy external programs or institutions
8. Existing and anticipated stakeholder needs, goals, and aspirations
9. Prior and anticipated interactive modality as well as patterns and levels of use
10. Retention period
11. Cost, balanced against value and other curatorial factors
12. Environmental impact – see, for example, (Pendergrass et al., 2019), balanced against value and other curatorial factors

These factors are consistent with those previously identified as part of the Harvard Library Content Value Assessment Tool (Harvard Library, 2018). (While originally developed in the context of audio/visual collections, the framework is generic in scope and applicability.) The online Decision Tree tool from the Digital Preservation Coalition (DPC) provides a useful framework for systematically considering a similar set of criteria (Digital Preservation Coalition, 2015).  

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7 https://www.dpconline.org/handbook/organisational-activities/decision-tree
4.3 Acquisition or Creation

In distinction to the policies of many other digital preservation programs at peer institutions, the DRS does not have an enforceable concept of “acceptable” formats, which implies other formats as being unacceptable and therefore open to rejection for deposit. As mentioned in Section § 2.1, the DRS is explicitly open to digital objects in any format, albeit with the important proviso that the inherent characteristics of certain formats may impede future preservation efforts and outcomes. Whenever there is discretion regarding format choices, those choices should favor formats that are most amenable to long-term preservation efforts. DPS is available for consultation and recommendations regarding format decisions. These recommendations are based on prior practice (Harvard Library, 2023a), local experience and expertise, as well as conformance to recognized international best practices in this area, e.g., (Library of Congress, 2022a, 2022b; NARA, 2018, 2022; Open Preservation Foundation, 2022).

4.4 Packaging and Submission

The DRS makes use of the concept of object-level content models (CM) to define and document the structure and characteristics of objects (Harvard Library, 2019). In essence, content models provide a means of typing content at the object level analogous to what MIME formats do at the file level. Associating objects with their content model types facilitates preservation stewardship by permitting analysis and intervention activities to be planned and executed at an aggregate, rather than individual, level.

4.4.1 Content Models

Eighteen (18) content models are currently defined, although several of them are no longer active choices, as indicated in Table 2.

<table>
<thead>
<tr>
<th>Content Model</th>
<th>Object Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. AUDIO</td>
<td>Time-based sound, e.g., Broadcast WAVE, MP3</td>
</tr>
<tr>
<td>2. COLOR PROFILE</td>
<td>Still image color space calibration</td>
</tr>
<tr>
<td>3. COLLECTION</td>
<td>Collection of archivally-processed email messages</td>
</tr>
<tr>
<td>4. DOCUMENT</td>
<td>Page-oriented document with rich formatting, e.g., PDF, Word</td>
</tr>
<tr>
<td>5. EMAIL MESSAGE</td>
<td>Individual archivally-processed email message</td>
</tr>
<tr>
<td>6. GOOGLE DOCUMENT CONTAINER 1</td>
<td>Google Book Search monographic digitization –</td>
</tr>
<tr>
<td></td>
<td>NOTE: Since the GBS digitization activity is complete, this is no longer an active CM choice</td>
</tr>
<tr>
<td>7. GOOGLE DOCUMENT CONTAINER 2</td>
<td>&quot;</td>
</tr>
<tr>
<td>8. GOOGLE DOCUMENT CONTAINER 3</td>
<td>&quot;</td>
</tr>
</tbody>
</table>
9. **OPAQUE**  
Arbitrary digital content, for which no other CM is appropriate

10. **OPAQUE CONTAINER**  
Arbitrary digital content encapsulated into a single container for curatorial and managerial convenience

11. **PACKET**  
Archivally-unprocessed email

12. **PDS DOCUMENT**  
Page-turned document represented as constituent page images, OCR, and structural metadata

13. **PDS DOCUMENT LIST**  
Set of page-turned documents

14. **STILL IMAGE**  
Two-dimensional still image, e.g., GIF, JPEG 2000, TIFF

15. **TARGET IMAGE**  
Still image digitization calibration

16. **TEXT**  
Plain text, e.g., CSV, XML

17. **VIDEO**  
Time-based moving image and sound, e.g., MPEG

18. **WEB HARVEST**  
Web-published content captured by web archiving crawling – NOTE: Originally developed to support HL’s Web Archiving Service (WAX); as WAX is no longer in operation, this is no longer an active CM choice

Table 2 – DRS content models

DPS is available for consultation regarding appropriate content model selection. DPS and LTS are cooperating on the development of additional content models for explicit representation of newer content forms.

Recent enhancements to the OPAQUE and OPAQUE CONTAINER content models permits contributors to indicate the nature of the object’s otherwise opaque information content. This is done by the optional designation of one of six (6) newly defined descriptive roles for the object (see Table 3). A role is a descriptive tag that documents some aspect of the object to which it is assigned.

<table>
<thead>
<tr>
<th>Role</th>
<th>Content description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. CG_3D</td>
<td>Three-dimensional data, e.g., 3MF, STL</td>
</tr>
<tr>
<td>2. CG_AEC</td>
<td>Architecture, engineering, construction design data</td>
</tr>
<tr>
<td>3. CG_DATASET</td>
<td>Research dataset</td>
</tr>
<tr>
<td>4. CG_DISK_IMAGE</td>
<td>Forensic disk image</td>
</tr>
<tr>
<td>5. CG_EMAIL</td>
<td>Email</td>
</tr>
<tr>
<td>6. CG_VR_AR</td>
<td>Virtual reality/augmented reality data, e.g., glTF, USDZ</td>
</tr>
</tbody>
</table>

Table 3 – Descriptive OPAQUE/OPAQUE CONTAINER content model ROLES
The CG_EMAIL role is intended for email accessioned into the DRS from the new ePADD email archiving platform, which replaces the older EAS system.\(^8\) DPS and LTS anticipate future development of explicit content models for these content categories. The interim role tagging will facilitate future migration of objects from the OPAQUE/OPAQUE CONTAINER model to a new specific CM.

4.4.2 Object Submission

The primary supported option for individual object submission is the desktop BatchBuilder program (HUIT, 2017a). Modifications to existing DRS objects and files can be made through the online Web Admin interface (HUIT, 2017b). Documentation\(^9\) and training opportunities\(^10\) for these alternatives are available on the LTS wiki.

For digitized as well as born-digital still image and page-turned objects and time-based audio/visual objects, you may contact HL Imaging Services\(^11\) or HLPS Media Preservation Services (MPS),\(^12\) respectively, to act as depositing agent for you.

5 Preservation Storage

Secure, reliable, and performant preservation storage is a foundational component of the DRS. Beginning in FY23Q1, DRS incorporates new functional capabilities for multiple preservation storage service levels. This new technical capability allows HL to offer significant DRS price reductions relative to previous levels.

The DRS relies on a strategy of distributed storage replication under which the files for all managed objects are hosted independently at a number of geographically-dispersed locations on and off campus, and on a heterogeneous mixture of online, nearline, offline, and cloud storage media. The DRS supports dynamic (re)disposition of all managed digital files to storage targets according to their curatorially-designated storage classification. The benefits of this storage architecture include:

1. Avoidance of single-points of administrative or technical failure
2. Better alignment of storage conditions with curatorial assessments of value, intended use, and necessary level of preservation attention
3. More productive use of finite HL and HUIT resources
4. More flexibility to incorporate new storage opportunities as they arise in the future
5. Minimized operational costs, which are reflected in lowered DRS pricing billed back to contributing repositories
6. Maximized opportunities for effective, affordable, and sustainable preservation stewardship

All replicas are routinely audited to ensure that they remain faithful copies of each other. Should any

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\(^8\) The “CG_” prefix (“content genre”) is used to avoid lexicographic collision with existing or future role labels.
\(^9\) https://wiki.harvard.edu/confluence/display/LibraryStaffDoc/DRS+User+Documentation+Center
\(^10\) https://wiki.harvard.edu/confluence/display/LibraryStaffDoc/DRS+Training
\(^11\) https://imaging.library.harvard.edu/
\(^12\) https://preservation.library.harvard.edu/media-preservation
bit-level damage be discovered, damaged files are replaced with verified-correct replicas.

5.1 Classification

Storage classification is assigned at the individual file level. Note that the various files that constitute a given digital object may have different classifications. The DRS supports six (6) content classes, each defined by a unique combination of pertinent curatorial, administrative, and operational file characteristics (see Table 4).

<table>
<thead>
<tr>
<th>File class</th>
<th>File characteristics</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sensitive</td>
<td>(SE) Level 4 high-risk confidential information (HRCI) file (Harvard University, 2019)</td>
<td>Email with PII; forensic disk image</td>
</tr>
<tr>
<td>Repurposable</td>
<td>(RE) Non-Sensitive file suitable, or necessary, for patron discovery and delivery as well as long-term archival purposes</td>
<td>JPEG 2000 image</td>
</tr>
<tr>
<td>Deliverable</td>
<td>(DE) Non-Sensitive file suitable, or necessary, for patron discovery and delivery</td>
<td>Streamable MP3; audio playlist; PDS page image</td>
</tr>
<tr>
<td>Basic</td>
<td>(BA) Non-Sensitive, non-Deliverable/Repurposable file adjudged as low(er) risk/value</td>
<td>Digitized monographs also in HathiTrust</td>
</tr>
<tr>
<td>Large</td>
<td>(LG) Non-Sensitive, non-Deliverable/Repurposable, non-Basic file that is ≥ 5 GB in size</td>
<td>Archival MPEG-4 video</td>
</tr>
<tr>
<td>Archival</td>
<td>(AR) Non-Sensitive, non-Deliverable/Repurposable, non-Basic, non-Large file</td>
<td>Archival TIFF image</td>
</tr>
</tbody>
</table>

Table 4 – Content classifications

Absent explicit curatorial action, all object files accessioned into the DRS are assigned a default classification based on their pertinent characteristics:

1. If the file’s object defines a restrictive rights block (as is the case, for example, with email deposited from EAS or ePADD), then its class is set to Sensitive (SE)
2. Else if the file otherwise meets the requirements for the Deliverable class (DE) but also has a role of ARCHIVAL_MASTER or PRODUCTION_MASTER, then its class is set to Repurposable (RE)
3. Else if the file has an Access Flag of “P” (Public) or “R” (Restricted) and an associated FDS, IDS, or SDS delivery URN, or is a component of a page-turned object with a PDS delivery URN, then its class is set to Deliverable (DE)
4. Else if the file has a known curatorial designation as low(er) risk/value, e.g., files in the Google
Books collection, then its class is set to Basic (BA)

5. Else if the file size is greater than or equal to 5 GB, then its class is set to Large (LG)

6. Else the file’s class is set to Archival (AR)

However, curators have the capability to override these defaults and explicitly designate classifications at the point of deposit using BatchBuilder (HUIT, 2017a), or post-deposit using the online DRS Web Admin interface (HUIT, 2017b). Curatorial considerations regarding non-default storage classification should encompass the appropriate balance of curatorial needs and appraisals, ongoing cost, and environmental impact.

Note, however, that any files necessary for delivery service function (IDS, PDS, SDS) must be assigned to either the Deliverable (DE) or Repurposable (RE) classes in order to be visible to the services. This includes primary files, e.g., streamable audio MP3 and video MPEG, PDS objects, etc., as well as ancillary files such as audio playlists, video closed captioning, individual PDS page images and OCR, etc.

<table>
<thead>
<tr>
<th>File class</th>
<th>Online</th>
<th>Nearline</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Onsite</td>
<td>Offsite</td>
<td>Cloud</td>
</tr>
<tr>
<td>Sensitive</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Repurposable</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Deliverable</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Basic</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Large</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Archival</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

Table 5 – Replication policy and pricing

5.2 Replication and Pricing

Whenever a file’s storage class is (re)assigned, the DRS ensures that it is automatically replicated to all of the set of storage targets associated with that class (see Table 5). In some cases, reclassification may result in the removal of replicas from targets no longer needed for the underlying class. The DRS continues to operate on a partial cost-recovery basis, with quarterly billing of contributing repositories for the amount of storage capacity used by their collections. Current DRS policy associates between three to five replicas to each of the storage classes. The five storage targets hosting these replicas (online onsite/offsite/cloud; nearline; offline) each are based on a specific underlying technology and media. As the cost to HL and LTS for provisioning these targets varies, each storage class has its own specific price point.

The rightmost Price Reduction column is relative to the previous uniform DRS price point of $1.25/GB/year, indicative of an overall 28 to 56% lowering of DRS pricing. An online pricing calculator is available.
Historically, the cost of storage decreases over time. HL and HUIT monitor these costs on an annually basis to determine if any price adjustments are necessary. If so, these will be planned to go into effect on a fiscal year boundary.

Although Table 5 specifies pricing on an annual basis, internal billing of the contributing repositories occurs quarterly via an internal billing journal. The digital content from a given repository is associated with one or more DRS billing codes, each mapped to a 33-digit Chart of Accounts (CoA) code. The cost assessed to each billing code is calculated by summing the size of all files associated with that billing code in each storage class times the pro-rated quarterly price for that class as of 11:59pm on the last day of the quarter.

6 Quarterly Billing

The billing process for a given quarter executes early on the first day of the next quarter, e.g., the process runs on October 1 to calculate the billing amounts for a fiscal year’s Q1, July 1 – September 30. This results in a report sent to HL Finance to initiate the journaling activity. Each contributing repository also receives a similar report documenting the amounts for each of that repository’s billing codes. This report is emailed to the repository owner (also known as a DRS “Owner”) and billing contacts (DRS “Billing Contact” and “Billing Project Contact”) for each of the repository’s billing codes. The individuals filling these roles and their contact information as well as associated 33-digit Chart of Accounts (CoA) codes can be managed in Web Admin. It is important that this information is kept up to date for accurate reporting and to ensure that the correct local funds are properly debited during the billing process.

7 Analytics and Reporting

DPS has instituted a process of annual reporting to DRS owners on the state of their holdings. These reports include both quantitative and qualitative summaries and assessments. Reports covering state and activity in a given fiscal year are generated and distributed early in the next FY.

References


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