

Creating Preservation Sets

Preservation sets help institutions assess and manage risks. The sets are created for formats and risks. Users can add conditions to the sets to narrow search criteria. You can create a Preservation set based on any type of risk.

To create a Preservation set:

1. Access the risk report on which you want to base your set (for example, **Preservation > Risk Analysis > View Global Risk Report**).

Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾

Home / Preservation: View Global Risk Report

Report Date 17/08/2016 14:42:47

1 - 2 of 2 records

	Risk Name ▲	Risk Query	No. of Formats		
1	Obsolete	-	1	View	Research Set
2	Zero Applications	-	9	View	Research Set

1 - 2 of 2 records

Back

Create Set for View Global Risk Report

2. Click **View** for the risk for which you want to create a set. A list of formats of the risk appears:

Home / Preservation: View Global Risk Report / Details

Risk Type Zero Applications

Filter: All Find: in: All Go

	Format Name	Extension	Institution	No. of IEs	No. of Representations	No. of Files		
1	fmt/353	tif,tiff,ptif	Demo Institution	68	72	95	Create Set	Preservation Plans
2	x-fmt/16	txt	Demo Institution	5	5	5	Create Set	Preservation Plans
3	x-fmt/392	jp2	Demo Institution	2	2	2	Create Set	Preservation Plans
4	fmt/101	xml,dtd	Demo Institution	1	1	1	Create Set	Preservation Plans
5	x-fmt/110	txt	Demo Institution	1	1	1	Create Set	Preservation Plans
6	x-fmt/263	zip	Demo Institution	1	1	1	Create Set	Preservation Plans
7	x-fmt/266	gz,z	Demo Institution	1	1	1	Create Set	Preservation Plans
8	x-fmt/408	ps	Demo Institution	1	1	1	Create Set	Preservation Plans
9	x-fmt/62	log	Demo Institution	1	1	1	Create Set	Preservation Plans

Back Create Set for Selected Preservation Plans for Selected

Risk Formats

3. Select a format and click **Create Set** for the row.
4. If you filter the formats, you can select multiple formats:

The screenshot shows a web interface for 'Risk Formats'. At the top, there are navigation tabs: Deposits, Submissions, Data Management, and Preservation. Below this is a breadcrumb trail: Home / Preservation: View Global Risk Report / Details. The main heading is 'Risk Type' with a value of 'Zero Applications'. There is a search filter set to 'Image (Mix)' and a 'Find:' field. Below the search area is a table with columns: Format Name, Extension, Institution, No. of IEs, No. of Representations, No. of Files, Create Set, and Preservation Plans. Two rows are visible, both for 'Demo Institution'. The first row is for 'fmt/353' with 68 IEs, 72 representations, and 95 files. The second row is for 'x-fmt/392' with 2 IEs, 2 representations, and 2 files. At the bottom, there are buttons for 'Back', 'Preservation Plans for Selected', and 'Create Set for Selected'.

	Format Name	Extension	Institution	No. of IEs	No. of Representations	No. of Files	Create Set	Preservation Plans
1	fmt/353	tif,tiff,ptif	Demo Institution	68	72	95	Create Set	Preservation Plans
2	x-fmt/392	jp2	Demo Institution	2	2	2	Create Set	Preservation Plans

Risk Formats – Filtered

5. Select a format and click **Create Set** for the row or select multiple formats and click **Create Set for Selected**.

Note

Multiple formats can be selected only within the context of a single classification.

6. The Search Conditions page appears.

search_conditions.png

Create Set - Search Conditions

The Search Conditions page displays general information about the format and allows you to add conditions to a search for objects that make up a set in the Add Conditions section.

7. To create the Preservation set, click the **Save Query as a Set** button. The set is created:

The screenshot shows the 'Search Conditions' page. It has a search bar with 'Find:' and 'in: All' and a 'Go' button. Below the search bar, it says '1 - 3 of 3 Records'. There is a table with columns: Name, Format, Risk Code, Plan Name, Created By, and Creation Date. Three rows are listed, all for 'Zero Applications' and created by 'admin1' on '8/17/16'. Each row has 'Edit Results' and 'Delete' buttons. At the bottom, there is a 'Back' button.

Name	Format	Risk Code	Plan Name	Created By	Creation Date	Edit Results	Delete
1 fmt/353,x-fmt/392.Zero Applications - 176511	fmt/353,x-fmt/392	Zero Applications		admin1	8/17/16	Edit Results	Delete
2 fmt/353,x-fmt/392.Zero Applications - 176296	fmt/353,x-fmt/392	Zero Applications		admin1	8/17/16	Edit Results	Delete
3 fmt/353,x-fmt/392.Zero Applications - 176397	fmt/353,x-fmt/392	Zero Applications		admin1	8/17/16	Edit Results	Delete

Set List

8. To launch the Basic Preservation Plan workflow, click **Launch Basic Plan**. For more information, see [Basic Preservation Plan](#).
9. To launch the Advanced Preservation Plan workflow, click **Launch Advanced Plan**. For more information, see [Plan Configuration](#).