

Shared Repository Content and Format Guidelines

MD-SOAR is provided through the USMAI consortium as a centrally managed underlying platform, on which participant institutions can build and deliver local library-based institutional repository services. Because each participant library's mission, customers, and capabilities are different, each participant library must develop local collection content, format, and metadata policies that best meet campus needs.

However, those local policies should reflect and conform to the general parameters of the MD-SOAR shared-use platform. Any use of MD-SOAR that does not conform to the guidelines below must be approved in advance by the MD-SOAR joint governance group.

- MD-SOAR will serve as a platform for openly discoverable and accessible digital content, but may also contain content with access and use restrictions that align with the internal needs of some participating libraries.
- Participant libraries may use MD-SOAR as a discovery and access platform for digital objects and metadata uploaded directly into the system, or for uploaded metadata that describes and links to digital objects stored and accessible via other networked locations.
- Digital objects ingested into or discoverable through MD-SOAR should be created or co-created by current or former faculty, staff, students, or academic and administrative units of the participating college or university; or should be materials held in the library's collection or closely related to the library collection where the library has permissions to distribute electronically.
- When necessary, participating libraries will require the appropriate permissions from copyright holders for items deposited in MD-SOAR, or otherwise be able to verify that such works can be made accessible via the library's institutional repository. For items that do not require the library to obtain permission, participating libraries must adhere to generally accepted library best practices regarding copyright and intellectual property rights.
- Resources in MD-SOAR collections should be academic and/or scholarly in nature or part of or related to existing library collections.
- Resources discoverable through MD-SOAR should be completed, not works-in-progress, unless the work will never be completed. Pre-prints are considered completed works.
- MD-SOAR runs on the DSpace technical platform. DSpace can ingest and retrieve a wide range of digital file formats or "bitstreams". However, participant libraries should develop more specific local policies and guidance regarding technical file formats that will be accepted as part of local repository services. Some suggested topics for consideration while developing these policies include:
 - Standardized vs. proprietary technical formats;
 - Clear identification and validation of formats to assist with long-term management and use of digital objects;
 - Emphasis on access formats;
 - Format conversion or migration services a library may offer (as appropriate);

- Clear communication that MD-SOAR should be considered a discovery and access platform, and is only part of a necessarily larger institutional digital preservation strategy.