

Portico Roles and Responsibilities

1. Policy Statement

- 1.1. Portico staff has delineated roles and responsibilities related to implementing changes within the system.

2. Implementation Examples

2.1. Move files within Portico content storage area	Designated Systems Team Member
2.2. Approve exclusions of content from archive ingest	Data Team Leads Data Team designee
2.3. Make changes (additions, corrections, deletions) to Portico business documents (BDO)	Publisher Content Coordinator
2.4. Modify profiles	External development partners Data Team Production Team
2.5. Review/approve profiles and profile modifications prior to deployment to ingest	Data Team Leads Data Team designee
2.6. Review/approve Turnover Documents and format action plans	Designated Data Team Members
2.7. Report needs for tool changes (other than profile) through JIRA system	Production Team Members
2.8. Modify tools (other than profile)	Designated Data Team Members External development partners
2.9. Request deployment of tools to setup	Designated Data Team Members External development partners
2.10. Request deployment of tools to ingest	Designated Data Team Members
2.11. Deploy tools to setup	Designated Data Team Members External development partners
2.12. Deploy tools to ingest	Designated Systems Team Member
2.13. Write documentation outlining reasons for request to delete content from archive/delivery site	Publisher Content Coordinator Production Team

2.14. Approve content deletions from archive and/or delivery site	Lead Research Developer
2.15. Delete content from the archive	Designated Systems Team Member
2.16. Write documentation outlining reasons for request to delete content from Portico file system	Production Team
2.17. Approve content deletions from Portico file system	Lead Research Developer
2.18. Delete content from Portico file system	Designated Systems Team Member
2.19. Review Portico policy statements	Lead Research Developer

3. Document History

3.1. Approved by: Kate Wittenberg

3.2. Last Review Date: 10/9/2025

3.3. Reviewed by: John Meyer, Kate Wittenberg

3.4. Change history:

Version	Date	Change	Author
0.1	6/19/2009	Drafted.	Stephanie Orphan
0.2	7/23/2009	Added title to "delete content from delivery site" role.	Stephanie Orphan
0.3	7/27/2009	Added profile approval role.	Stephanie Orphan
1.0*	7/28/2009	Updated to make it look more like a policy.	Amy Kirchhoff
1.1*	8/5/2009	Added reviewed by line and copy edited	Amy Kirchhoff
1.1.1	4/4/2011	Updated the logo	Amy Kirchhoff
1.2*	3/27/2016	Addressed changes in teams and vendors	Amy Kirchhoff
1.3	8/7/2023	Addressed changes in teams and structure	John Meyer
1.4*	10/9/2025	Updated roles, workflow. Replaced vendors with "external development partners" for clarity.	Karen Hanson

* An approved version of this document.