DIGITIZATION PROJECT DECISION-MAKING:
STARTING A DIGITIZATION PROJECT

Once you have decided that a digitization project *should* be carried out, and that your department or organization *can* support all the steps needed in the project (**Digitization Project Decision-making: Should We Digitize, Can We Digitize?**), the next steps are deciding on the specifics of the individual project. To start your digitization project, follow each of the following steps.

Step One

Define the materials to be digitized

➤ What types of materials?
   o How many of each type.
      ▪ For example: Photos, documents, audio formats, video, film, etc.
   o How many of each format do you have to digitize?
      ▪ For example: Glass plate photograph negatives, cassette tapes, reel-to-reel tape, VHS tapes.
➤ Define material specific concerns for the digitization process—these are not preservation concerns, these are time/workflow issues. For example:
   o Are documents two sided?
   o Do you have oversized materials?
   o Do your cassette tapes have two sides (side A, side B)?

Step Two

Decide on the method of digitization and technical specifications for the project

➤ Will you perform the work in-house or use contractors? Or a mixture?
   o Take into account costs, time, and the capabilities of your organization. Outsourcing digitization work can be the better option in some situations.
   o For example, if digitization of a set of U-matic tapes will only happen once, or just a few times, and the cost of equipment is more than the cost of outsourcing, this may be a situation where outsourcing is preferable.
   o Consider this question for all parts of the digitization process: conversion, metadata creation, preservation/conservation, etc.
➤ If you will do all digitization steps in-house, gather all needed technology and equipment.

- Decide what file types, formats, and quality you will save files.
  - Follow standards and best practices based on format.
  - Specify each of these technical specifications for the preservation master copies, access copies, and any derivatives, as they will serve different purposes.

Step Three

Decide how you will provide access to materials

- What technology or platform will you use?
  - Will you use a website, Content Management System, computer station, provide access by request, or another type of sharing platform?
  - Is there any training that you or your staff needs to use this platform?
- Define steps for how materials will be uploaded, saved, or transferred to provide access.
- Make sure that the other steps in your digitization process make it easy to provide access. For example:
  - When you are creating metadata, make sure that the metadata scheme you are using will fit well with your sharing platform.
  - When you are deciding on which file formats to use for access copies, make sure that your sharing platform can adequately store and display the format.

Step Four

Define a metadata scheme and workflow

- Choose a consistent metadata scheme and define each field according to your institution or project parameters.
- Decide how metadata will be entered, created, or collected.
  - Will you use spreadsheets, a database, a Content Management System, or another method?
  - Who will be carrying out metadata creation? Does the person need specialized knowledge or training?
- Decide when metadata will be created. For example: will it be done before digitization, during, or after?
- What information can your community add, beyond basic metadata?
  - Is there more knowledge that you can gather from community members? How will you record and incorporate this metadata?

Step Five

Define a file naming convention and folder structure for the project

- A naming convention is a meaningful system of naming digitized files, descriptive and easy to understand, consistent across projects.
- A naming convention should be unique to each institution, collection, and file.
- File names should link the digital file that is created through digitization to its original physical item.

- ➢ Define resources needed to create a naming convention, or use an existing naming convention.
  - ○ Do you need to collaborate with others in your department? Do you need outside assistance?
  - ○ Does this project's naming convention fit within your overall collection naming conventions?
- ➢ Create a folder structure that will keep files organized as the project grows, this can also mirror the arrangement of the physical collection, if helpful for digital organization and management.

Step Six

Define steps for quality control in the project

- ➢ Quality control (QC), or quality assurance, is the process of checking results (files, metadata) to make sure they are in line with the standards and technical specifications that you have set for the project.
- ➢ QC should take place during all steps of the digitization process: not only for reformatting, but also for saving, editing, creating metadata, uploading or preparing for access, and any other steps.
- ➢ More than one person can and should be responsible for QC.
- ➢ Establish QC procedures before beginning a project and adhere to them throughout.
  - ○ Create a regular schedule specifying who does the QC work, at what time intervals, and what percentage of materials are checked.

Step Seven

Establish a digitization log or tracking sheet(s) for documentation purposes

- ➢ It is important to document what is being digitized. Typically, you want to track:
  - ○ What is digitized
  - ○ By whom
  - ○ When
  - ○ What files were created
  - ○ Where the files are stored
- ➢ Use the log or tracking sheet once the project starts, make sure any staff involved where project files are stored and how to access and use them to track the progress of the project.

Step Eight

Gather and define written procedures for the project

- ➢ No matter who will be completing the work of the steps in the digitization process, it is important that each step is clearly explained and documented.
- ➢ A project manual or workflow is a good starting point. Typically this includes:
  - ○ All the necessary steps or instructions in the project's workflow
    - • Digitization (for all material types)
    - • Saving

- Metadata
- Editing
- Uploading or preparing for access
- Quality Control
  - Easy-to-understand explanations of each stage of the project and each process involved.
  - List of who to go to with more questions, staff contacts.
  - Guidelines for troubleshooting.
- Share your documentation with the appropriate staff.