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MASC Digitization Projects Checklist

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Below is a checklist of decisions and documentations required for every MASC digital project. The point of these requirements is to keep everyone working on a project on the same page. Having documentation keeps things clear for project team members by specifying who is responsible for each task, and what criteria and standards the team is following. If other staff need to be brought into the project, as part of the team or to help with troubleshooting, such documentation provides a record of what's being done and how they can help. By creating and keeping documentation for each digitization project, MASC will have a record of examples and experiences. This record can be used to improve and expand future projects.

Every digitization project is unique. Materials, deadlines, audience, and project team members effect policies and procedures, and the level of detail of both, needed for each project. However, the appropriate national, Orbis Cascade Alliance, and WSU standards must be followed in all projects where they apply. See the Bibliography/Reference list in the *MASC Digitization Projects Planning and Documentation* document for links to these standards as well as guidelines and examples that may be helpful in creating policies and procedures for individual projects.

Answers to these questions, policies and procedures documents, and references for the project team members will be saved in *lib2k\masc\Digitization\Digital Projects*. The folder should be named by Collection. If a collection has multiple projects, the projects will be kept in separate subfolders by project name and date. At the end of the project, all materials will also be archived in a metadata folder with the digitized images at *lib2k\masc2*.

- Decide and document who is responsible for various project stages. Include, at minimum:
 - o Project leader
 - o Processing management
 - o Quality control
 - o Processing work
 - o Metadata management
 - o Time slip supervisor

- Document overall decisions (Much of this may be found in the *MASC Digitization Projects Planning and Documentation* document, but should be clearly and separately documented for reference.) Include, at minimum:
 - o Availability, where and how
 - o Archiving, where and how
 - o Minimum processing standards for various materials
 - o Minimum metadata standards for various materials
 - o Specific software/hardware to be used, and, if appropriate, why.
 - o How materials and work will be tracked and coordinated (e.g. Spreadsheet, Google Docs, Microsoft Teams Planner)

- Create a complete and detailed document of all the processing steps. This should be complete, from shelf to digital file to public availability. Include, at minimum:
 - o File naming convention

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- Guidelines/instructions for handling physical material, including preprocessing and refiling steps
 - Guidelines/instructions for image processing, including quality and resolution requirements
 - Required and optional metadata, including rights/use information
 - Requirements and guidelines for each metadata element, including lists of fixed vocabulary, and commonly used names and terms
 - Guidelines for quality control steps, for images and metadata
 - Guidelines/instructions for media archiving, storage
- Create a separate document(s) for project team members, specifically time slip employees, if appropriate. Include:
 - Project overview
 - General guidelines and expectations for project work
 - Timecard instructions
 - Set up and login information for any needed software/hardware
 - Step by step instructions for specific workflow(s)
 - Guidelines and requirements for metadata
 - What to do/who to contact when there are problems and/or questions
 - Create a bibliography/reference list of materials used to make decisions and/or needed for processing.
 - Used to decide naming/spelling/translation conventions
 - Used for special material processing procedures
 - Used for biographical/historical information
 - Create an outline of the “landing page” for collection.