

10 THINGS TO CONSIDER BEFORE DIGITISATION





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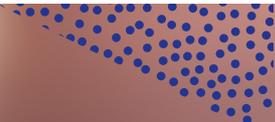
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Why are you digitising?

Access? Preservation? Research? Revenue or all four?

Access is a great reason to digitise your collections in order to disseminate the information more widely, the key area to consider is file format as users will not want to download large files or open large files on mobile devices. You will also need to consider if this is for local access or for publication on the web.



Preservation will be both a driving consideration as well as an added benefit. Reduced handling of the original item will save costs both in long term preservation and retrieval. However, long term preservation of the digital objects will also need to be considered along with the appropriate standards and ongoing costs required to maintain the integrity of the digital object.

Digitisation has become a cornerstone for online research and has transformed the way in which user's access collections from around the world. Collaborative working has become the norm and as such consideration should be given as to how you facilitate this activity.

Many organisations may want to generate a revenue opportunity from unique content. There are many models to expedite this including subscriptions and micro payments. Given the various options available, your portal choice is vital in achieving success.

What is the purpose of the project?

Consider the objectives of your project and how they will fulfil the needs of both your core audience and the funder. Is your project part of a wider corporate strategy and how will it meet those needs?

Will the project support innovative methods of research and how will you engage with users to facilitate this? Are you looking to generate income to support further digitisation and what financial models will be used? What will be the impact of your project and how will this be measured? Will the digital content require a dedicated portal or can your current website offer the functionality that may be required by end users?



Planning the Project

Start your project by identifying the Stakeholders, both internal and, where applicable, external.

Use your stakeholders to create a risk log that will allow you to identify risks, how likely they are, who the risk owner is and what the mitigating actions are.



Create a communication plan that will determine who you communicate to, how often and how. A monthly highlight report should be short, concise and cover only the major points.

Plan the timeline for your project by breaking down all the activities and using 80% capacity as a realistic throughput target, this will allow some contingency for the unexpected. If items need conservation prior to digitisation, then this needs to start early in the project. In the same vein ensure any catalogue information that may be required is fit for purpose.

Create a project schedule that includes all activities and identify areas that have interdependencies. Some tasks can be managed in parallel, however, this may mean co-ordinated approaches from different departments.

Plan your budget around the various activities and build in a 10% contingency, if this looks like it will not be spent towards the end of the project then the project board may wish to digitise additional content.

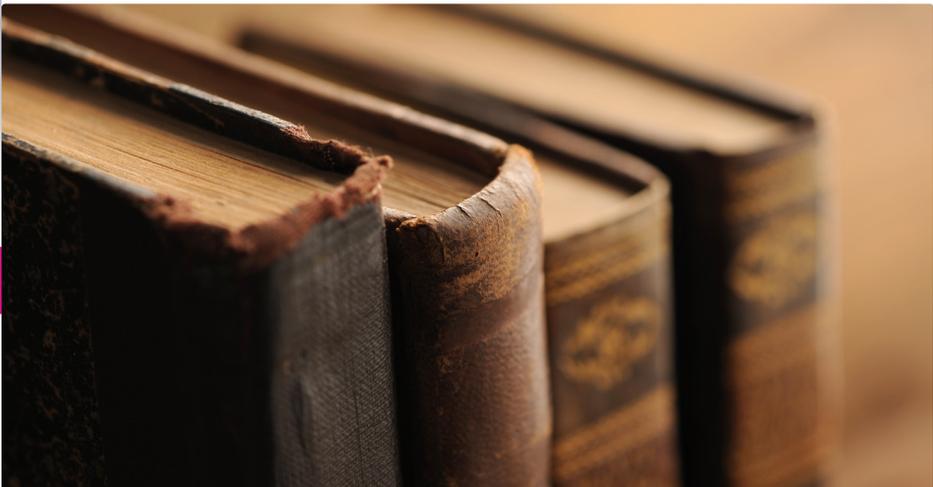
Material Selection

When selecting content, it is prudent to select more than is required for the project, in particular if you are working on a bulk project as you may find items that are unfit for digitisation without major intervention.

It's also useful to review the content selection with a user group to determine that their needs are being met. It's far easier to deselect content than identify new content once a project has started.

Carry out a condition assessment to identify items that need conservation prior to digitisation. This will allow you to produce a Traffic Light Report that will show "easy to do without preparation", "light preparation needed" and "major conservation". This report should be used to help plan your throughput and get your project off to a quick start.

Check your content selection carefully for any copyright or data protection issues, early identification will allow you to negotiate with copyright owners if needed.



Are You Portal Ready?

How will the content be delivered? On an internal website or a dedicated portal? What are the technical requirements of the portal?

Depending upon the original purpose of the project this will influence the configuration required. How much content will need to be archived? How much key wording and metadata is to be applied? Your assets will need to be accessed regularly so indexing and classification are key. Will the archive need to address a public audience or only internal staff? Is some of the content sensitive and requires permission controls? Are there any copyright issues that need to be managed? Is the content going to be available for sale? The original objectives and the audience requirement will determine what type of web interface should be designed. It is important to think of the objectives today but also future developments in terms of integration with other platforms as part of an overall strategy.



Preparation and Storage

If the content requires preparation prior to digitisation will you have a dedicated team for this?

If so what level of preparation is required, this could include basic tear repair, removal of staples or clips. Will any condition metadata be captured at this stage? How far in advance of digitisation will the preparation be completed and how will this be recorded and made available to the digitisation team? If content is managed by type and size the process will be more efficient. Ensure an adequate supply of materials to be used is always available.

How will items be stored during preparation and digitisation? Appropriate shelving and storage conditions will need to be considered along with a suitable tracking system to ensure all items can be traced to their work activity. Security of content during the process will also need to be considered. Content will need to remain with the digitisation team until images have passed through QA to avoid repeat retrieval.



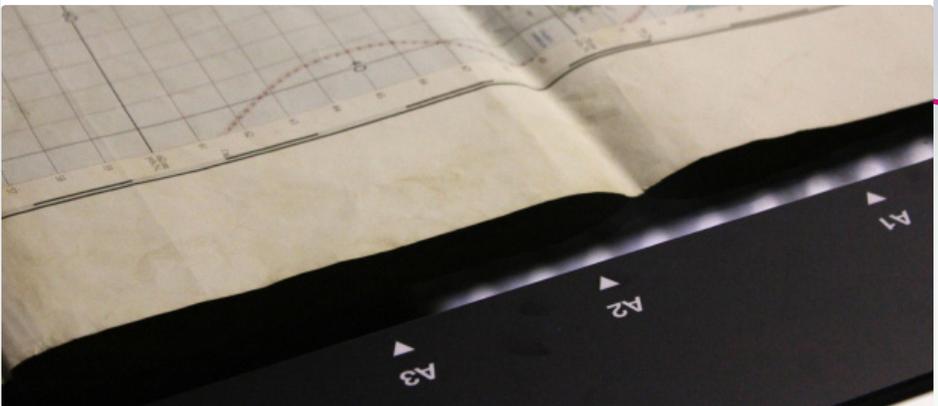
Choosing the Right Equipment

Equipment choice should be based on the size and type of content that is to be digitised.

All equipment has its pros and cons and it might be appropriate to have several different pieces of equipment to accommodate the scope of the project. However, where a small number of items require a specialist approach it might be more suitable to outsource the activity or rent for a short period. Different equipment will require different skills to operate and will almost certainly have different operating interfaces, so consideration should be given to having the in-house skills needed to get the best results.

Digitisation from surrogates will require specialist equipment and can very often be quite expensive to buy. The choice of suitable production equipment can be quite limited so try to get feedback from current users to determine what's right for your project.

You will need to get some accurate and realistic throughput rates for any equipment that you use and scale back from the stated manufacturers rate of production as these are only achieved in ideal conditions.



Define the Workflow

By defining and documenting your digitisation workflow you can record decisions, track issues and maintain a consistent approach.

The documentation should give you the status of an item and the stages it has progressed through to reach its current point in the process. Define in the workflow where you will add technical, descriptive and structural metadata and how this will be presented. Set standards for the digitisation to include file naming convention, file format of the master images, file format of the access copies, resolution, bit depth, colour space and colour management. State how often and when the equipment will be colour calibrated. Define what level if any of image manipulation is allowed and to what tolerance levels. Set the stages for each level of QA and define the standards. Set digitisation rules to handle the capture of blank pages and fold outs, background colour etc. Scope appropriate amounts and areas of storage for both original and back up files. Set controls on who can access the files and what rights they have to read and write.



Choosing What to Digitise

When faced by a huge archive, it may be better to scan by topic rather than from A to Z.

Topical subjects can be revenue earners. In this way you can work through the archive by tackling areas in order of importance or relevance. This also helps in terms of minimising the expense for key wording. Assets need to have the correct key words to ensure target audiences can find them. This additional expense can be managed over time by prioritising the most popular assets first. Managed this way additional key wording for new assets could be self-funding as well as show your stakeholders some firm ROI sooner rather than later.



Rights Checking

Is the content wholly owned by you or will you be working with other copyright holders?

With many archives there is still a need to add additional imagery by professional photographers or from third party agencies.

Make sure there is a process to record and manage rights, and handle royalty payments, to ensure the organisation remains compliant and doesn't breach copyright laws.



Make sure the licencing terms are recorded and managed as part of the DAM system. Ensure there are correct checks and balances in place to stop any contravention of content licencing terms such as saleability in only one country ... or exclusivity clashes with content that has already been licensed.

Capture VAULT is a free-of-charge product from Capture which represents our mission to always hold best practice in copyright at the heart of our operations and systems. It offers integration with the Copyright Hub to provide free registration and embeds keys into content to enable the tracking and prevention of misuse or evidence to charge penalties for unauthorised use. Capture VAULT will also embrace other asset security and registration services as they come on stream.

This tracking also lets content owners utilise an additional channel to monetise their content.





What to capture?

- ▶ In short: Everything!
- ▶ As much detail as you need depending on:
 - ▶ Available storage space
 - ▶ The smallest level of detail
 - ▶ To ensure you don't have to digitise the object again (within reason!)
- ▶ Don't forget recto and verso (front and reverse)
- ▶ Don't forget context
- ▶ Master files and surrogate files
- ▶ Capture results that will have the broadest possible use

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The Digitisation Workshop

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