

Title:	Recommended Steps for Digitizing Collections, University of Notre Dame, Hesburgh Libraries
Creator:	Digital Standards Team Alexander Papson, Metadata and Digital Services Librarian, (Chair) Julie Arnott, Manager, Preservation Tracy Bergstrom, Interim Co-Program Director, Digital Library Initiatives and Scholarship Curator, Italian Imprints and Dante Collection Dan Brubaker-Horst, Digital Library Applications Lead Susan Good, Webmaster and Desktop Consultant, Kresge Library Adam Heet, Library Assistant II, Architecture Library Rick Johnson, Interim Co-Program Director, Digital Library Initiatives and Scholarship – E-Research And Digital Initiatives Patricia Lawton, Catholic Research Resources Alliance Digital Projects Librarian Denise Massa, Curator, Visual Resources Center Joe Reimers, Technology Support Specialist, Kresge Library Sara Weber, Special Collections Digital Project Specialist
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Status of Document:	This is a Digital Standards Team recommendation.
Description of Document:	This best practices document recommends the implementation of a core set of recommended steps to follow for the digitization process. These steps will help the collection owner or contributor to organize the materials and aid in making the digitization process more efficient.
Change Log:	

This document is a set of guidelines to aid in the process of selecting collections and items for digitization. These guidelines will help to expedite the process and ensure the best results.

Digital items available

Are the items already available through another site or institution? If the items are available is there anything that is missing that we can improve on such making the text searchable or accessible. Are the scans easy to use and understand? If the items are already available and easy to locate through a common search then there is no reason to digitize the collection.

Type, size, scope of material

If the items are unique or mostly unique and digital copies are not available then the size, type, and scope of the materials should be reviewed and documented. Make a note of what materials are available and roughly how many are in the collection. How do the materials relate to each other and other collections that we have already digitized?

If there are text based documents what condition are they in? Are they bound and if so how tightly? Is the material copyrighted or protected?

If there are audio or video materials what format are they in? What condition are they in? Is there way to still play them or digitize them or do we need to look for a vendor that can handle the materials? Are transcripts available for the materials and if not is someone willing to create one if need be?

If the items are images what condition are they in? Are they stored in any container or are they loose? Are negatives available for any photographs or are the photographs the only images available?

If the items are computer programs or electronic files what format are they in? Is there a machine that can readily open the files still or do we need to look for a vendor that can transfer the items to a modern format?

Organized or not

The next step is to determine if and how the collection is organized. If the collection is not organized is someone going to be willing to get the items in a logical order if it is possible? Having the items in a logical order will help with the digitization and description process and help relate the items.

Described or not

Once it is determined if the items are organized then the next step is to see if any type of description or materials to aid in the description are available. The more information about the items that is available will help identify important facts that will aid in discovery and use of the materials.

Research needed or not

If descriptions are not available how much research is going to be needed to get an accurate and thorough description of the material? Remember the more information that is available about the items will aid in discovery and use.

Translations or transcriptions needed

If the materials are handwritten, audio or video files, or a foreign language then translations and transcriptions should be considered for ease of use and discovery. The typed translations and transcriptions can allow the items to be used by a broad audience and accommodate a variety of learning styles.

Materials needing digitization or format changes

If the materials that are being considered for digitization during the initial assessment of the collection the types of formats should have been reviewed. What would be required to get the materials from an antiquated format to the accepted formats for the repository? If the items are born digital what would it require to transfer them to a more readily acceptable format for the repository?

Level of authority control needed

Once the materials are reviewed it is important to determine the level of authority control that is needed for the items in the collection. This will vary from collection to collection and certain items will require more time and expertise to describe and apply subjects to. A general idea of the level and amount of authority control for the collection will help estimate the amount of time it will take to complete the descriptive metadata for the project.

Preservation

The next step is to determine if the items are in need of preservation consult and if the digital files will be preserved. If the items are damaged, brittle, or will become damaged during the digitization process then the Preservation Department should be consulted so that the materials can be protected.

If the digital files are going to be established for preservation purposes then it is important for Digital Programs to know this so that the necessary steps can be taken.

Meet with Digital Programs

Once the general information is documented about the collection a meeting with the Digital Programs department is needed to get the project off the ground. During this meeting the project guidelines, desired outcome of the project, and the project timeline can be discussed.

Bring the above information that has been gathered and if possible bring a few examples of materials from the collection for review. The more information and examples that are available will aid in determining the best course of action for the collection.

Meet with Metadata and Cataloging

Once the items are being processed by the Digital Programs Department the next step will be to get the metadata started. It is important to bring along any information that was discovered to aid in describing the materials and that will help with the discovery of the materials. Any research strategies should be discussed at this time as well.

If the metadata is being created by the collection owner or another source the elements will be reviewed in detail during this meeting.

Meet with subject librarians

As the metadata is being compiled it is important to take the information and review it with the subject librarians. The subject librarians will be able to reveal other possible search terms or related keywords for the project as well as resources. As the project is completed the subject librarians can promote the collection to the various groups that they interact with.

Storage of materials

The long term storage of the materials will be discussed during the Digital Programs meeting if the items are going to be preserved.

Launch of site

Once the collection is completed and the site is live it is important to advertise that the collection is available so that it can be used. This could be done through a blog entry, mass email to listservs or colleagues, and other announcement or marketing techniques.

Inbound links and citations

To aid in discovery it is important to create inbound links and citations to the collection or items. Review sites such as Wikipedia for related pages to the topic and cite to the collection, cite the collection in blogs or other related resources as well. Review other institutions or organizations for similar collections and request that a reference link be placed on the page to the new collection. In return a reference link could be added to the collection for the other organizations. The more links and citations that are available the better the chances are for discovery, use and higher rankings in search results.

Quality Control

Once the collection is posted and the site is live it is best practice to review the contents occasionally. Make sure that the links are all working properly, that files open properly and that all materials are working as they should. Review the metadata for accuracy and make sure that the records are clear and concise and still make sense. These checks will ensure that the collection continues to work properly and efficiently.