Document Review Procedures

Overview:

The Conrad Blucher Surveying Collection contains field books, land surveys, maps, and indices, as well as documents from three generations of the Blucher family. The documents are currently held and maintained by the Special collections and Archives department of the Texas A&M University – Corpus Christi Library. These documents are scanned, uploaded, and cataloged by employees of the Spatial {Query} Lab. In order to maintain a high quality product, we subject every document to a review process before clearing it for publication to the Texas Digital Library. This review process is completed by senior member of the S{Q}L team.

Document Review Procedures:

Step 1: Scan Quality Assessment

The document review process begins with a thorough assessment of the quality of a scan. It is important that the scan is acceptable because any metadata will be lost if a scan has to be re-uploaded.

1. **Artifacts** – These are the most common sources of error on a scan. Dust on the document or scanner glass can result in long colored lines on the scan. These artifacts are generally unacceptable and require a rescan. Steps 1 & 3 of the Large Map Scanning Procedures outline how these can be avoided, refer scanners to these steps.
2. **Duplication** – This is an uncommon source of error, but when it does occur the scan is always deemed unacceptable and requires a rescan. This error is a product of high-latency between the scanner and the computer. Step 6 of the Large Map Scanning Procedures instructs what to do when a scan has a major error, refer scanners to this step.
3. **Cut-off edges** – If scanning software auto-clips the edges of a document during scanning the document needs to be rescanned. Any information on the document that is not captured in the scan is unacceptable. Step 6 of the Large Map Scanning Procedures instructs what to do when a scan has a major error, refer scanners to this step.
4. **Poor readability** – If a scan's readability is poor enough at 300dpi (200dpi for old scans) that interpretation of the document is highly degraded, it can be scanned at a higher resolution. This is not common practice, alert scanners if you think a higher resolution is needed. However, they should seek approval from their team leader.

Step 2: Metadata Review

The metadata review is the most important part of the document review process, as well as the most time consuming. Extreme attention to detail and hypervigilance is necessary during this step.

1. **Supplied Title** – If a document does not have a title it must be supplied. Refer to the Supplied Titles Procedure for instruction.
2. **Spelling** – This is the most important error to correct, thoroughly check all spelling, especially in searchable fields. (Titles, authors, customers, companies) When spelling is no decipherable, refer to the map, all spelling should match the spelling on the document.
3. **Coordinates** – The most common error stems from the fact that many scanners are not experienced students of surveying. Most scanners will interpret distance-and-bearing as coordinates. Remember, GPS surveying was not around before 1978, and was still not common before the mid-to-late 90's. Unless the map is a quadrangle or military map, it likely does not bear coordinates. Direct scanners to coordinate notice posted in the lab.
4. **Rectification & Readability** – After the scan quality and general metadata has been assessed, decide whether the rectification & readability of the document is poor, fair, or good. This evaluation will be critical during the rectification process that follows the review process.
5. **Needs Review Toggle** – Once the document has been reviewed and any necessary correction have been made, toggle the 'Needs Review' button to 'No.'

Step 3: Tracking sources of repeated errors

Over the course of tens of thousands of documents, mistakes are going to be made. The occasional typo or misclassification of a document is acceptable, that is why the Document Review process is in place, but when errors become frequent it is up to the designated QA/QC employee to identify the source of the errors so that retraining or procedure updates can stop the frequent error.

1. **Scanning Log** – If the frequent errors are coming from the scan quality assessment, use the scanning log to identify who was operating the computer during those scans. Inform the team lead on that scanner what the error is and instruct them to retrain the individual making the errors.
2. **Admin Activity Log** – If the frequent errors are coming from the metadata, use the Activity Log in the Admin section of BandoCat to identify which employee is making the errors. Inform the team lead on the issue and instruct them to retrain the individual making the errors.

*If errors persist after retraining, inform Dr. Smith on the issue.