The Rise and Fall of Favor-Based Digitization: 🍰 Workflows Taste Better on a Cake 🍰

Pat Lawton, Special Projects Librarian
Mikala Narlock, Digital Collection Librarian
Patrick Rader, Media Digitization Specialist

University of Notre Dame Hesburgh Libraries
The Team

- Aedin Clements (RBSC)
- Hye-jin Juhn (Subj Spec)
- Rob Kusmer (RAD)
- Patrick Milhoan (SCS)
- Kevin Cawley (University Archives)
- Patrick Rader, Mikala Narlock (Digital Production)
- Helen Hockx-Yu (Lib/OIT)
- Jeremy Friesen (Note Taker)
- Pat Lawton (Facilitator)
- Laurie McGowan (Project Manager)
Focus

“How do I move my item from selection through digitization to being accessible to library patrons (e.g., in CurateND, the library catalog, DEC, etc)?” -- DCW Team Charge
Problem to Solve

"You sometimes feel like you're asking for favors instead of going through a workflow process."
Process

- Tap resident knowledge
- Create venue for transfer of knowledge among people and units
- Create new knowledge
**Use Case 1: Mixed-media archival collection**

RBSC has identified a mixed-media collection they wish to purchase from a private seller. The seller is a noted scholar with an emphasis on Catholicism in the American South and the collection consists of approximately 40 cubic feet of materials. Material types include manuscripts (unpublished paper-based materials), posters, brochures, and pamphlets - approximately 2 cubic feet of which are marked for digitization. Also included within the accession are floppy disks, compacts discs, digital versatile discs, thumb drives, one 2TB external hard drive, email, an iPhone, various artifacts and realia - including a tea set, and the seller’s collection of out-of-print books from his own personal library. The scholar was also an advocate of using social media and the web to promote his own scholarship. This includes his own personal website and numerous social media accounts. In addition, part of the collection may be of less interest to RBSC, but would be of interest to University Archives.
Marathon Sessions
Mixed Media
Archival Collection
Summer 2018
<table>
<thead>
<tr>
<th>Name</th>
<th>Last modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Case 1 - Digitize Analog Materials Held by Library</td>
<td>Nov 27, 2018</td>
</tr>
<tr>
<td>Use Case 2 - Purchase Datasets</td>
<td>Nov 27, 2018</td>
</tr>
<tr>
<td>Use Case 3 - Preserve PDFs from Publishers and Organizations</td>
<td>Nov 27, 2018</td>
</tr>
<tr>
<td>Use Case 4 - Add Commencement Programs to CurateND</td>
<td>Jan 29, 2019</td>
</tr>
<tr>
<td>Use Case 5 - Migrate Born-Digital Media</td>
<td>Nov 19, 2018</td>
</tr>
<tr>
<td>Use Case 6 - Acquire Mixed Media Collection</td>
<td>Nov 19, 2018</td>
</tr>
<tr>
<td>Use Case 7 - Process Regularly Received Resources (ULRA)</td>
<td>Nov 27, 2018</td>
</tr>
<tr>
<td>Use Case 8 - Digitize Brittle Books for HathiTrust Ingest</td>
<td>Nov 29, 2018</td>
</tr>
<tr>
<td>Use Case 9 - Catholic Pamphlets</td>
<td>Jan 24, 2019</td>
</tr>
</tbody>
</table>
Deliverables

- Nine Workflows
  Each workflow represented a different common need from the departments involved. They were then simplified & generalized to be used for future cases.
Deliverables

• Acronyms and Glossary of Terms
## Deliverables

Identified and shared Description of Discovery and Storage Solutions at HL (or, where do I put my stuff?)

<table>
<thead>
<tr>
<th>If you have...</th>
<th>It may be hosted on....</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books and other bound materials</td>
<td>HathiTrust</td>
</tr>
<tr>
<td>Out-of-Copyright materials</td>
<td>Internet Archive</td>
</tr>
<tr>
<td>Individual photos, maps, papyri, or other image collections</td>
<td>CurateND</td>
</tr>
<tr>
<td>Photos, maps, papyri, or other images for use as a comprehensive exhibit</td>
<td>Digital Exhibits and Collections (DEC)</td>
</tr>
<tr>
<td>Cultural items (e.g. photographs, letters, maps, etc.) related to the history of Indiana</td>
<td>Indiana Memory</td>
</tr>
<tr>
<td>Cultural items (e.g. photographs, letters, maps, etc.) related to Catholicism</td>
<td>CRRA</td>
</tr>
<tr>
<td>Audio or Video materials converted for preservation storage</td>
<td>AP Trust (Dark Archive)</td>
</tr>
<tr>
<td>Audio or Video materials converted for access for a particular class</td>
<td>Notre Dame Reserves</td>
</tr>
<tr>
<td>Sensitive materials</td>
<td>AP Trust (Dark Archive)</td>
</tr>
<tr>
<td>Notre Dame faculty or student work, including text, images, audio, or video</td>
<td>CurateND</td>
</tr>
</tbody>
</table>
Deliverables

Identified and shared Description of Discovery and Storage Solutions at HL (or, where do I put my stuff?)

HathiTrust
Trusted digital repository

Scope: Digitized library materials from member libraries
Formats/Types: Primarily books, but can include other print materials
Copyright: Mixed, some are and some are not under copyright
Primary Function(s): Preservation, distance reading through HathiReader
Access: Anyone can access public domain materials. Access copyrighted materials for research purposes

Why would I put my digital objects here?
- HathiTrust is a trusted digital repository
- Long term preservation

AP Trust
Scope: Long term preservation in a secure environment and soon to be Trusted Digital Repository
Formats/Types: Any Format, Prefer to be in preservable format like TIFF or WAV
Copyright: This is a dark archive so copyrighted materials are safe and can not be viewed
Primary Function(s): Dark archive for long term preservation
Access: Limited to ingest only

Why would I put my digital objects here?
- Long term preservation that will soon be a Trusted Digital Repository for any materials

Curate ND
CurateND is a research repository designed to help manage and preserve original academic work, collections, and related content produced by members of the University of Notre Dame community and to facilitate global discovery, access and sharing. To this end, CurateND welcomes the contribution of any scholarly works and supporting materials created by individuals or collaborations affiliated with Notre Dame that can advance research for the greater scholarly community, regardless of digital format (text, data, image). In addition, CurateND welcomes scholarly materials curated and/or digitized by the University Libraries or University's Records Office, the Archivist, or endangered works and materials that may not be available to future updates.

How do I put my digital objects here?
- DAPO and DAS submit the records
- HathiTrust and AP Trust are available to submit
- CurateND accepts a wide range of formats, from text to audio, video, images, and more to just the papers

Contact: DAPOS: dapos-list@nd.edu

Contact: AP Trust: digitalrepository@nd.edu

Contact: CurateND: curate@nd.edu
Deliverables

Preliminary work on Forms

Project Name *

Please describe the project, including the scope and purpose. *

Please estimate the amount of content to be digitized (number of pages/items, etc.). *

Type(s) of Material(s)

- Books
- Images (Prints, drawings, etc.)
- Maps
- Slides/Negatives
- Large, rigid items (e.g., mounted art)
- Audio
- Video (Note: To request video reserves, go to http://reserves.library.nd.edu)
- Other

Copyright Status

- In copyright
- Out of copyright
- I don't know
- Other

Project name *

Your answer

Project Description (What is the problem you try to address? What do you want to accomplish?) *

Your answer

Why is it important? *

Your answer

Customers? *

Your answer

Product/Process/Service Owner

Your answer

Who is responsible for the work?

Your answer

Is there a "Must Complete By" Date for this project? If so, what is it?

Only enter a date if there is a hard date the project must be completed by.

Date
Fall 2018
How to Work with Selectors/Requestors?

Workflows as blueprints, “architectural drawings”
- Behind the scenes, helpful to units doing the work
- Can’t just hand requestor a workflow
How to Work with Selectors/Requestors?

Requestors want to know that their materials will be processed by an approximate date, and that they will be in the loop each step of the way; they need someone - a person - to help think through projects - at any point in the process, from concept to completion.
Case Managers

n. ~Facilitator; Liaison. Provides guidance and support for digitization, including born-digital, projects; serves as liaison between units and selectors; manages and customizes the workflow for each project as necessary. This person will be the primary contact for the Selector, and will keep the Selector apprised of progress and consult the Selector prior to making any decisions.
Case Managers

- Facilitator and liaison
- As workflow designers (in collaboration with units)
- Oversees the entire process
“Case Managers”
Sustaining and extending the work through a community of practice
A Team of Case Managers

• Comprised of individuals from units doing the work

• Assist in or be responsible for shepherding cases through the process, from request to discovery/storage

• Better understand problems and develop solutions organically and collaboratively
Recruiting New Members

• Institutional buy-in from units across the library
• Promotes transparency between departments
• Better understanding of unit capacities, unit processes, library wide-workflows
Additional Roles

- Full Case Managers
- Supplemental Case Managers
- Unit Liaisons/Representatives
- Assessment Team
# Project Tracking

<table>
<thead>
<tr>
<th>Key Title</th>
<th>Selector</th>
<th>Unit</th>
<th>Case Manager</th>
<th>Current Status</th>
<th>Next steps, Date, Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rossignol Letters and Photographs</td>
<td>Julie Tanaka</td>
<td>RBSC</td>
<td>Mikala</td>
<td>Digitized and described; waiting for Universal Viewer.</td>
<td>03/8/19: Per Sara W and C (approx. one month) while Image Viewer. This is so that collection first in DAVE and timeline back three months.</td>
</tr>
<tr>
<td>Reel to Reel Oral Histories</td>
<td>Erika H.</td>
<td>RBSC</td>
<td>Mikala/Pat</td>
<td>Digitized by Erik Dix, rights may be a question. wants preserved and discoverable</td>
<td>Feb. Mikala meeting with Pat, put Mikala and Erika in the loop. Mikala followed up with options. 1/11/19 pat meets Erika and Monica on rights questions arose concerning the collection. Keep track. Per Mikala. 12/13/19 with Monica and Erika on <a href="https://drive.google.com/drive/folders/1WyTcsU2cULW7?usp=sharing">https://drive.google.com/drive/folders/1WyTcsU2cULW7?usp=sharing</a>. Again about status of digitized objects.</td>
</tr>
<tr>
<td>CD of Old Images</td>
<td>Marsha S</td>
<td>CSSS</td>
<td>Patrick R</td>
<td>Rights cleared; status of CD and files unknown. Wants preserved and discoverable.</td>
<td>12/05/18: Meeting with Patrick R. Deadline on this, so the new CD looks like before the image will be made.</td>
</tr>
<tr>
<td>Massey Memorial Collection</td>
<td>Carol Brach</td>
<td>Engineering</td>
<td>Mikala</td>
<td>Items digitized; description ongoing. Wants accessible.</td>
<td>03/29/19: Waiting on copy. 4.16.19 Let the digitizing begin. Harzier, Steve Mattson - J out a contextualized exhibit. Propose meeting with Julia. Ping Mikala. Needs another Case Manager. 11.29.18 Timeline for holiday. She will calendar. Calenda.</td>
</tr>
<tr>
<td>Gabriel Collection</td>
<td>Julia Schneider</td>
<td>Medieval Institute</td>
<td>Pat</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Project Tracking
Outreach

Overview

Digitization at Hesburgh Libraries is facilitated by a team of Case Managers.

After the Digitization Request Form is submitted, the request is triaged and a Case Manager is assigned based on the nature and scope of the project. The Case Manager serves as the primary point of contact for the duration of the project. From the first consult with the Selector, through coordinating efforts with affected units, and to promoting the materials, the Case Manager acts as both an intermediary between the Selector and the process, and as a guardian, shepherding the collection through the appropriate workflows.

If you are interested in contacting the team to initiate a project or consult, please send an email to casemanager-list@nd.edu.

Steps towards starting a digital collection

1. Read the the Digital Collections FAQ. This document is designed to help you answer questions posed in the Digitization Request Form.

   a. There is also a Legal Glossary (hosted by the University of Michigan) that includes some basic information on legal terminology.

2. Look at some of our sample workflows (LINK) to learn more about the digital collection proposal process at...

https://libguides.library.nd.edu/building-digital-collections
A Resolution Revolution

Do you hear the people sing?
Let them eat cake

All workflow participants know their roles
Projects can be finished quickly

Subject selectors receive prompt replies

More aware of our pain points
Can celebrate our successes!
Thanks to our teammates!

- Aedin Clements (RBSC)
- Hye-jin Juhn (Subj Spec)
- Rob Kusmer (RAD)
- Patrick Milhoan (SCS)
- Kevin Cawley (University Archives)
- Helen Hockx-Yu (Lib/OIT)
- Jeremy Friesen (Note Taker)
- Laurie McGowan (Project Manager)

- Tracy Bergstrom (SCCS, Cabinet Sponsor)
- Amanda Gulley (DAPOS, CM)
  - Jira expert
  - Title contributor
- Peggy Griesinger (RAD, CM)
- Alex Papson (DAPOS, CM)
Thank you

Questions?
Pat Lawton: plawton@nd.edu
Mikala Narlock: mnarlock@nd.edu
Patrick Rader: prader@nd.edu