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# Why digitize?

We know what we're doing, don't we?

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# Why digitize?



- To unleash access to unique materials
- To enable history, sharing, collaboration, data mining
- To find out what you've got
- To reduce wear and tear on fragile artifacts
- As a temporary measure to capture information from a failing format: audio, moving images



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# Best practice, Harvard-style

- Ensure continued use of the reformatted material through:
  - Clearly defined goals
  - Open standards in selecting target formats
  - Robust metadata for intellectual control
  - Understand and control the allowable changes to artifact and its contents
- Do it right, but do it only once
- Create an ‘enduring copy’
  - Although nothing is permanent, it should last as long as technically possible
  - Media with known lifespans in controlled environment
  - Will you be a ‘preservation repository’?

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# Best practice, Harvard-style

- Surrogate should be appropriate to the purpose: restored? perfect copy?
  - ‘Look and feel’ – significant properties
- Guarantee the integrity and quality of the copies
  - Standards for quality control, including computer systems
  - Inspection of statistically valid samples (up to 100% of population if needed)

Does this sound like Lone Arranging?



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# Best practice, Lone Arranger-style

- Goals are flexible, along with changing priorities
- Does it once, realizing it may need to be done again
  - Keep the originals
- Handles policy issues on the fly, adapts as needed
- Handles a mixture of formats but knows best-practice targets
  - TIFF or JPEG2000 or JPEG
  - PDF
  - WAV?
- Errs on the side of access in copyright questions
- Does not make preservation claims; adequately informs users of risks
- Understands tradeoffs with hosted solutions



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# Best practice, Lone Arranger-style

- Champions access over other priorities. More product, less process
- Captures best possible content and metadata – under the circumstances
- Understands the pace of change
- Embodies the aphorism ‘Perfection is the Enemy of the Good’
- Ensures success by managing the expectations of users and patrons, evolving as necessary



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# Best practice, Lone Arranger-style



It's Halloween.  
Is that a nun  
costume or a  
real nun?



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- How's this for a skill set?
  - Photo editor
  - Caption writer
  - Metadata analyst
  - Workflow analyst

- Preservation officer
- Policy writer
- Social media maven
- Human factors engineer
- Clairvoyant

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# Managing user expectations

- Digitization policy protects the Lone Arranger!
  - Frees him or her to make appropriate decisions
- Digitization, thanks to Google, sets up expectations that objects will be available – discoverable – ‘forever’
- It is neither possible nor desirable to digitize everything
- Adherence to format standards protects library/archives from taking in material they can't sustain
- Managing user expectations is largely about educating them in the fundamentals of digital preservation
- It runs counter to much of what they are being told today by the market and culture



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# Managing user expectations

*'I want to keep everything forever.'*

<b>I WANT</b>	<b>Who is the “I” here? Who is doing the asking? Which contributors is he or she representing? Is he or she important to the institution?</b>
<b>TO KEEP</b>	How should it be kept? Can it be printed on paper? Can it be converted to a stable digital format like PDF? What are the properties of the item that have to be preserved? Must it be authenticated?
<b>EVERYTHING</b>	The whole collection? Is it duplicative or unique? What is in it? How much processing will it require? Every format? In original software?
<b>FOREVER.</b>	Is it in a format that will be around for awhile? What do you mean by forever? Are there legal issues with retention? Is long-term preservation possible?



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# Managing user expectations

- Protect yourself – don't agree to the impossible
- You CAN keep paper, you CAN'T keep email in proprietary formats (without building another email system)
- Ask users to help you reach their goals and take some responsibility

Depositor: **I have some student videos to archive.**

You: **I can't guarantee how long they'll last, but I can take them under certain conditions.**

Depositor: **Such as?**

You: **If you want to be able to search for them in our repository, I'll need full transcripts, shot lists, and they'll have to be in .WAV format. But whether they remain readable is up to you.**

Depositor: **Good enough. I can live with that.**



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# Managing user expectations

- Be gentle but firm.

Depositor: **I have some student videos to archive.**

You: **I can't guarantee how long they'll last, but I can take them under certain conditions.**

Depositor: **Such as?**

You: **If you want to be able to search for them in our repository, I'll need full transcripts, shot lists, and they'll have to be in the .WAV format.**

Depositor: **I want them saved in Final Cut so we can use them later.**

You: **Sorry, I can only take finished versions in .WAV. However, I can take them on disk and will hold them for 5 years. But I can't guarantee the integrity of the disks – that will be up to you.**



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# MSMC policy

## **Material ineligible for archiving**

Because of digital copyright issues and the current complexity and cost of preserving electronic materials, the following types of material are typically excluded:

- Digital video and photography
- Email unless printed and in file folders
- MSMC Web pages except printable PDFs
- Audio and multimedia tapes, DVDs, CDs and flash memory devices
- Documents or other content stored on third-party websites, including Facebook, Twitter, Flickr, Google Docs, blogs, etc.
- Any material to which MSMC does not hold clear copyright



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# Digital policy for Lone Arrangers

- Where is the push for digitization coming from?
- Is there **funding, infrastructure, knowledge**?
- Do you have to do the scanning in-house or can it be farmed out?
- Will the results be stored and maintained in-house or hosted elsewhere, including the Cloud?
- What level of perfection do you have to achieve, and who is making that decision?
- Are you in a governance or legal record situation?
- Is interoperability an issue? Are you required to use a standard metadata suite like MARC?



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# Digital policy for Lone Arrangers

## The honest self-assessment

1. T/F – I am comfortable developing and creating my own metadata
2. T/F – I know the basics of Dublin Core and why it's useful for electronic objects
3. T/F – I am familiar with common digital formats, and know which are robust and which to avoid
4. T/F – I am knowledgeable in my field and can enforce digital policy confidently
5. T/F – Technology does not scare me. Even if I can't do certain things myself, I know what to ask about and where to find answers, including whom to call



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# Digital policy for Lone Arrangers



## The honest self-assessment

1. T/F – I have a good idea going in which collections would be the best candidates for digitizing
2. T/F – I am not shy about promoting the archives
3. T/F – I am enthusiastic about digitizing and convey that to my colleagues and patrons
4. T/F – I am comfortable with social media – not just Facebook – and would be up to blogging and tweeting
5. T/F – I know enough about digital preservation to explain it to other people

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