Conway Hall

Digitisation Operational Manual

A How-To Guide to Digitisation

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Digitisation Operational Manual

A how-to guide to digitise at the Humanist Library and Archives.[1]

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[1]Using the *Architecture & Place* project as a template.

Introduction

This operational manual documents the entire process at the Humanist Library and Archives to digitise a collection from project planning, through platform configuration, content ingest and finally to the reflection steps. This process is outlined in the figure below (Fig. 1).

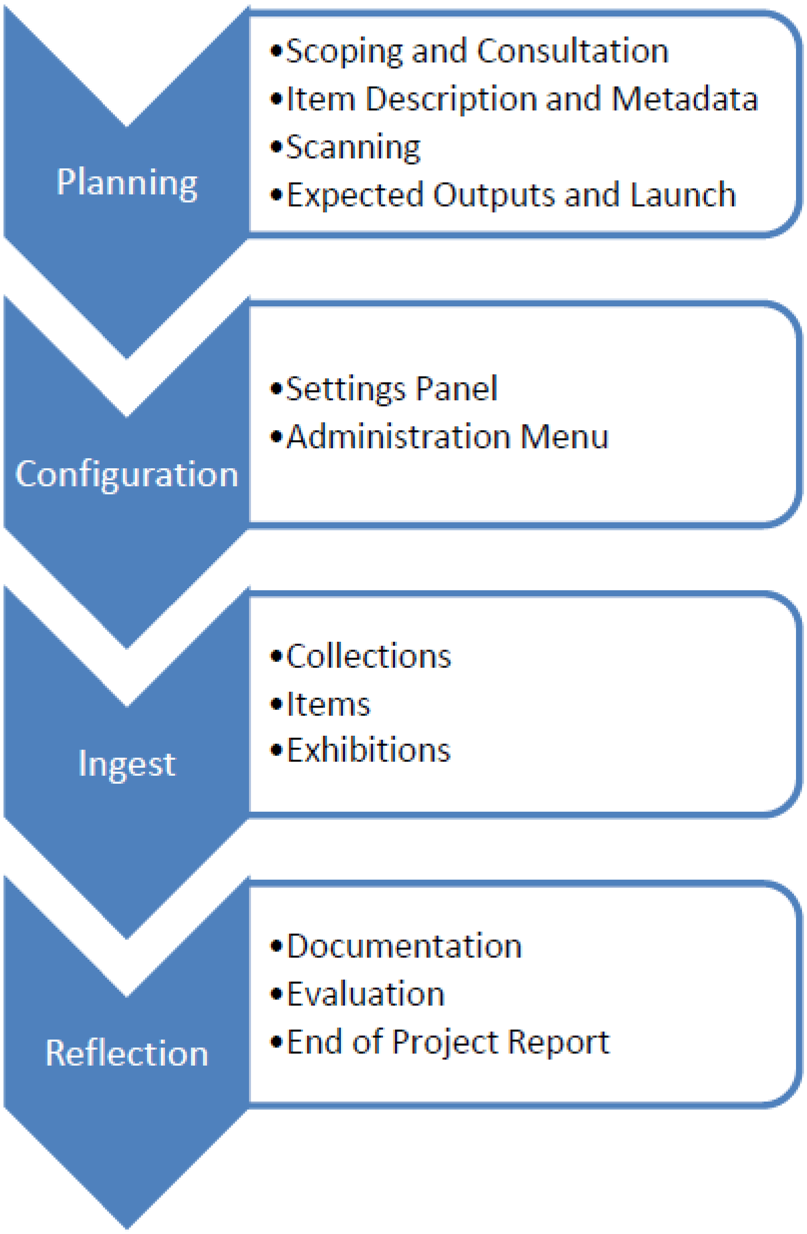

Fig. 1 Digitisation Process

The Planning Process

There are a number of steps that take place during the planning stage. How many are included or how extensive they might be is driven by the nature of the project. The *Architecture and Place* digitisation project was a pilot project and so was not as extensively planned as a larger or more complex project might be. A pilot allows for the development of institutional knowledge which can be documented to guide future projects; a too strict planning process does not allow for the agility to respond to unexpected or not yet fully understood issues encountered throughout the duration of the pilot.

From the outset it is important to develop and set timelines for the project so that you can be clear when each step, including those dependent on previous steps, are expected to be started/completed. Frequent reviewing of the timeline can help prioritisation of tasks to ensure that the project is completed in a timely fashion.

In addition, for a larger or more complex project, you can develop a digitisation plan to cover more thoroughly the steps outlined in the project timeline. If undertaking stakeholder consultation then a plan can be a very useful document to circulate for feedback; a plan may even be developed to offer different paths to digitisation dependant on the feedback on the needs of existing and potential users. This is covered more thoroughly below.

Other steps included in the planning process include:

- Collection scoping;
- Stakeholder and audience consultation;
- Item description and metadata;
- Scanning vendor selection;
- Platform scoping[2];
- Expected outputs – public and administrative; and,
- Project launch, resources and promotion.

Scoping

Digitisation projects are predominantly dependent on the content of your institution's collections; unless you are working with other GLAM[3] sector partners on a joint project. Therefore it is critical to develop a thorough understanding of the collections you hold.

Scoping a possible digitisation project requires not just an understanding of your collections but also:

- the themes you may want to develop;
- whether you'll be undertaking consultation;
- your budget;
- the timeframe for project development (copyright may be an important factor here); and,
- how your possible project aligns to relevant organisational strategies and plans e.g. Conway Hall Centenary Strategy and the learning strategy and its outlined aims.

This last point is to ensure that the digitised material is integrated into the learning that is offered by Conway Hall. This is to minimise the risk of the digitisation project becoming 'siloed' and therefore unsustainable in the long term.

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[2] This need only be undertaken once at the beginning of your digitisation programme unless you are undertaking a very different type of digitisation from projects you previously completed.
[3] Galleries, libraries, archives and museums

During scoping you will develop a scoping document to outline possible projects discovered in an initial investigation of the collection/s. When a decision is made for a particular theme or collection to be developed into a digitisation project then you can create a selection criteria document to assist in selection as well as a scoping spreadsheet. In this spreadsheet you can capture details of the selected items for the project identified after an in-depth look for material. Versions of this spreadsheet may be shared with scanning vendors to get quotes, to capture condition reporting information or developed into copyright due diligence tracking documents.

It is important to recognise that the shape of your project may change during the course of its development. For example, your project might grow after discovering suitable items that are not yet catalogued or there might be material that you wish to include that you are unable to due to being denied copyright permission. With this in mind it may be recommended that you set aside some of your budget for any unexpected scanning needs and/or look for projects that are not as complicated regarding copyright.

Stakeholder/Audience Consultation

Architecture and Place was a pilot project; decisions around what would be appropriate as a pilot project were made from scoping possible projects, looking at which had the broadest appeal and range of media to help determine a platform that could meet the widest needs of Conway Hall.

It is not uncommon, such as with the above pilot project, to derive the shape of digitisation projects from the collections held. However, it can be of great benefit to undertake consultation with stakeholders (such as collection generators) and existing and potential audiences to drive the project shape and outputs, which might include volunteer and community engagement, learning or other opportunities.

The choice of whether to undertake consultation is institution and collection dependent. If you are looking for external funding then consultation can be a factor in a successful funding bid. If choosing to undertake consultation then you will need to:

1. Identify stakeholders/audiences
    a. If you are looking to consult the general public then a survey is useful. But how will you administer it? At the launch of *Architecture and Place* at the Open House London Festival 2016 we used print versions of a survey to canvass public opinion as to which material by topic they would be interested in seeing digitised. This survey is also available on the digitisation platform website.
    b. If specific audiences or stakeholders are of interest then creating focus groups can be an especially useful way to engage with these communities and identify their information needs.
2. Identify potential partners and their audiences if you are looking to undertake a joint project.
3. Undertake the consultation process.
4. Analyse the results.

Consultation may be risky if you're looking for confirmation of a digitisation choice rather than being open to the feedback you will receive. It is also not recommended to undertake consultation if there is little to no flexibility in the shape of your proposed project. Consultation should only be undertaken if you are willing to allow the feedback received to shape the project.[4]

Despite the risks, consultation can be a worthwhile exercise to encourage community engagement early on in a project and also provide opportunities for relationship building.

Item Description and Metadata

Firstly, all items being considered for digitisation should already have been catalogued. If a small number have not been catalogued or fully described then the project can still go ahead but if a large number of items to be digitised have not been catalogued or fully described consider putting off the project until cataloguing has been undertaken. A lack of description can be a sizeable threat to any timelines you set for the digitisation project and so it is not advisable to go ahead until description is complete.[5]

Secondly, consider your metadata standard. The standard used by the Humanist Library and Archives is Dublin Core (DC)[6]. This is because it is the standard supported by the Omeka platform. Not all of the information included in an item's description that appears on the library catalogue and/or in the archival finding aids, will be used on Omeka; only some descriptive and administrative metadata[7] is captured, partially due to the 'flat' nature of DC itself. As it is 'flat' it is difficult to capture structural metadata and only a little easier to capture certain types of administrative metadata. Some of this metadata is captured elsewhere in other documents or encoded within the digital items themselves.

In some use cases the 'Source' field has been used to capture administrative metadata but there is little consistent usage of this field across all DC collections and so it is not currently used in this fashion at the Humanist Library and Archives. If, in the future, a decision is made to change this then retrospective cataloguing may be undertaken as required.

Look to the metadata guide[8] for a profile of how DC is used by the Humanist Library and Archives.

Scanning

Scanning is an essential component of the majority of digitisation process and is often a stage that is critical to meeting deadlines. It is not uncommon to encounter issues during this stage. It can be broken down as follows:

1. Create item spreadsheet which can be developed from the scoping spreadsheet; this will be sent to the scanning vendor to assist them

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[4] An example of consultation undertaken by the Library, Archive and Digitisation Assistant in a previous role: http://nzetc.victoria.ac.nz/tm/scholarly/tei-MokoDiscussionPaper.html.

[5] This is based on personal experience and advice from staff at UCL who worked on material for the Wellcome Digital Library.

[6] http://dublincore.org/

[7] Metadata falls broadly into three categories: administrative, structural and descriptive. Descriptive metadata captures similar information to that included in a library catalogue, e.g. title, author, abstract and so on. Structural metadata captures the structure of an item; for a book this might include title page, contents, chapters, chapter subdivisions and so on. This type of metadata is generally only captured if the digital item is complex and there is a mechanism to present the interrelated digital scans/objects. Administrative metadata covers technical, preservation and rights metadata.

[8] 20160817 Conway Hall Digital Collections metadata guide: http://conwayhallcollections.omeka.net/items/show/185

    a. Write condition reports - photograph and describe existing damage for each item
    b. Include item dimensions (if required)
2. From condition reports note where conservation work is required before an item can be sent out for scanning - note costings and timelines
    a. Currently we use the conservation services of National Conservation Services
3. Develop naming conventions; this has been completed for the *Architecture and Place* project and so the naming conventions document for that project can be used as a guide for future projects
4. Define scanning requirements; again this has been completed for the *Architecture and Place* project and so there is guidance there
    a. Minimal requirements
        i. TIFF for master images; JPG for presentation images
        ii. 400dpi
        iii. Full colour
        iv. With border (at least for archival material; may be required for print also)
5. Vendor
    a. Experienced dealing with archival material? Ask for referrals
    b. Costs
    c. Transport
    d. Timelines
    e. Ensure that they hold onto items until we are full satisfied with delivered digital images (nb. This did not happen with *Architecture and Place* therefore lesson learnt!)
6. Undertake quality assurance (QA) for scanned digital items
    a. For archival projects that are reasonably sized (a few hundred items) – check all scans
    b. For large (several thousand scans) print collection projects – check 10% of scans
7. Check physical items on return against condition reports, note damage and feed back to scanning vendor
8. Store digital master images (TIFFS) in restricted harddrive or server space (S:\Digital) that is backed up regularly

Expected Outputs

Obviously the main expected output is the digitisation project itself. However there are other outputs such as:

- Scoping documents (collection, metadata, platform)
    - Selection criteria document
- Project plan with stated aims and objectives
- Timeline, or perhaps Gantt chart for large projects
- Condition reports
- Scanning technical specifications and naming conventions document
- Summary of consultation document - if undertaken
- Metadata guide
- Operational manual

- Due diligence forms (when searching for copyright holders)
- Update reports for trustee meetings and blog updates
- An end of project report
- Marketing material (detailed further below in the Launch section)
- Learning resources
- Volunteer guides
- Policy documents

Not all of these have been created for the *Architecture and Place* project, as yet at least. For other projects there may be additional outputs. Some of these outputs may be shared with Information Management colleagues or the public to share learning and show the decision making process. As there is little standardisation of the digitisation process across the field it is best practice to share what you have learned so those grappling with similar issues to you may benefit from your knowledge.

Many of these documentary outputs allow you to demonstrate your decision making rationale to trustees and others. In addition, they are invaluable when writing articles for scholarly or professional journals.

Launch

The launch of a digitisation project is dependent on several factors: the content; size of project; what partners are involved; how it can be tied to learning activities, a festival or some other public event; budget; and many others.

For *Architecture and Place* we initially brainstormed several launch ideas (including holding a minecraft competition) which were pared down when we considered actual and time costs. We tied the launch to the Open House London Festival in September 2016 which gave a timeline of around a year to complete the pilot project. The festival offered us the opportunity to promote the project as well as gain feedback on possible future digitisation project topics. Over the festival weekend we offered:

- Access to the digitisation project
- Images from the project projected onto a screen
- A physical exhibition to complement the online project as well as display of several plans (that could not fit in our exhibition cases)
- A rehung light fitting that had previously lit the main hall including the plan for the fitting and a photograph showing it in use
- Project bookmarks and an exhibition pamphlet to promote the architecture of Conway Hall and the digitisation project
- Tours of the building focusing on the architecture as well as the society's history
- Family Trail Pack, again focusing on the architecture of the building

Generally, what needs to be prepared in advance of the project launch date?

- Completed online collection
- Contextual information (in the form of exhibits on Omeka)
- A complementary physical exhibition in the library (if appropriate)

- Physical marketing items
- Room bookings (as required)
- Blurb to accompany online promotion of project (plus an idea of where to promote)[9]
- Associated activities to be delivered for launch such as family/community workshops, tours.

Omeka

Introduction

Omeka was the platform chosen on which to build our digitisation projects as it best met our needs when compared to other platforms during our platform evaluation process.[10] Help pages for the Omeka platform can be found at: http://info.omeka.net.

Settings Panel Configuration

The setup of Omeka is relatively straightforward. Doing so requires your own account (which you can set up for free) and 'Super' access to the Conway Hall Omeka website/s.

From the 'manage website' Dashboard page you can see the Settings panel at the top with four menu headings:

1. Plugins
2. Appearance
3. Users
4. Settings

Fig. 2 Settings Panel

Plugins

Plugins that are available for use on Omeka.net are listed on this menu. First a plugin must be installed and then activated (using those respective buttons) before they can be used on the

[9] We promoted the *Architecture and Place* digitisation project on Conway Hall's social media; Twitter and Facebook. To email lists: ARA, the UK discussion list for archivists, conservators and records managers; the History and Digitisation as well as the Digitisation Strategy lists hosted by JISC; NZ-LIBS; as well as the Digital Curation Interest Group and the Digital Content and Libraries Working Group (both US ALA lists). We contacted the New York Society of Ethical Culture, Omeka.net to ask for project to be included on their Showcase page and all the copyright holders who gave us permission to digitise. We asked for a blurb on the project to be included in the Historic Libraries Forum newsletter and have been invited to submit an article relating to the project to *Archives and Records*, an ARA journal for their autumn issue.

[10] See 20160426 Scoping Platforms.docx (http://conwayhallcollections.omeka.net/items/show/186) for more details.

platform. Some plugins require configuration and where this is possible/required there is an additional ‘Configure’ button. The plugins that have been installed and are currently in use are:

Plugin name	Configuration details
COinS	No configuration required
CSS Editor	Clicking on the configure button here allows addition of CSS code to make changes to how the live page displays beyond that set in the theme. A fuller description of what the current CSS includes is detailed in figure 3 below. Please note that the CSS editor for Omeka is somewhat restrictive; once saving make sure to check that the editor hasn’t deleted any elements or attributes. Also note that you are currently unable to include comments with your code.
Exhibition Builder	Set to Alphabetical
GoogleAnalytics	The ID included here is from the account set up for the Conwayhallcollections.omeka.net website on the Conway Hall google analytics account
Hide Elements	Title is currently hidden on the public website because of the CSS changes to the layout. If further changes are made to the CSS then this may need to be reconsidered. It might be opportune to consider suppressing certain fields from the Item type metadata to be hidden from the public in the future.
LC Suggest	This plugin is configured in the left hand menu
PDF Text	No configuration required
Simple Pages	No configuration required
Simple Vocab	This plugin is configured in the left hand menu

```
/* Changes the order of display in item pages – ensures files display at top of page
and the rest of the table in order. This is done by forcing each div into a table format
to be organised. Width set to 70% to make sure content fitted well within page. */

div#content {
display:table;
width:70%
}

div#itemfiles {
display:table-header-group
}

div.element-set {
display:table-row-group
}
```

```
div#item-citation {
display:table-row-group
}

div#collection {
display:table-footer-group
}

/*  Suppresses pagination of files. */
ul.item-pagination {
display:none
}

/* Suppresses the display of the file header. */
div#itemfiles h3 {
display:none
}
```

Fig. 3 CSS code for ‘Thanks, Roy’ theme

There are several other plugins that may be of use in the future (especially the API plugin so material can be exported) but only those absolutely required have been implemented at this time.

Appearance

The appearance menu has 3 tabs; Themes, Navigation and Settings.

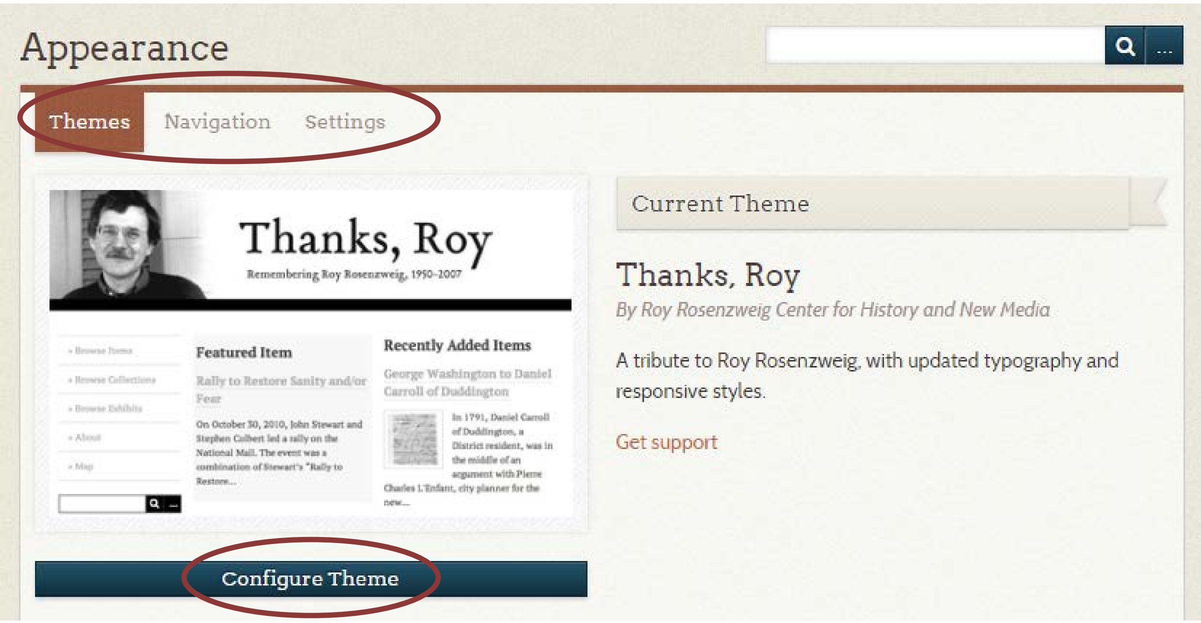


Fig. 4 Appearance Configuration

Themes

Themes are the main way to change the look of the website. The theme currently used is called “Thanks, Roy.” Changing the theme will not only impact the look of the website but also will cause the CSS that has been written and included to probably break. For this reason if the theme is changed be sure to check what impact this has on the way fields are ordered on an item page and recode the CSS as required to ensure that the item files (images etc) are at the top of the page. Changing the theme will also affect which theme aspects can be changed as well so those discussed below are specifically for the "Thanks, Roy" theme.

When you click on the 'configure theme' button you may change the following aspects:

Theme aspect	Configuration details
Colors	The buttons and site title are set to #0292CE which is the colour of the Conway Hall logo. Other colours used were default from the theme.
Logo file	Use the Conway Hall colour logo - pay attention to the height limitation (max. 150 pixels).
Header background	This is currently set to a cropped image from the *Architecture and Place* project. This should be changed when a new collection/project is added. Don't use an image which is too large as this may cause it to display oddly on mobiles (this should be picked up in the browser checks undertaken prior to project launch).
Footer text	Currently set to our address. Any changes there may cause movement to other footer text (such as the copyright statement) so be sure to check this as you edit.
CSV Import	No configuration required
Display copyright in footer	Ticked
Use advanced site-wide search	Ticked
Display featured item	Ticked
Display featured collection	Ticked
Display featured exhibit	Ticked
Home page recent items	Set to 5 currently (as more or less matches length of 'display featured…' column).
Home page text	Currently includes introduction to website and library's physical and digital collections.
Item file gallery	Leave unticked! Suppresses full sized image display which is why we do not use it.

Navigation

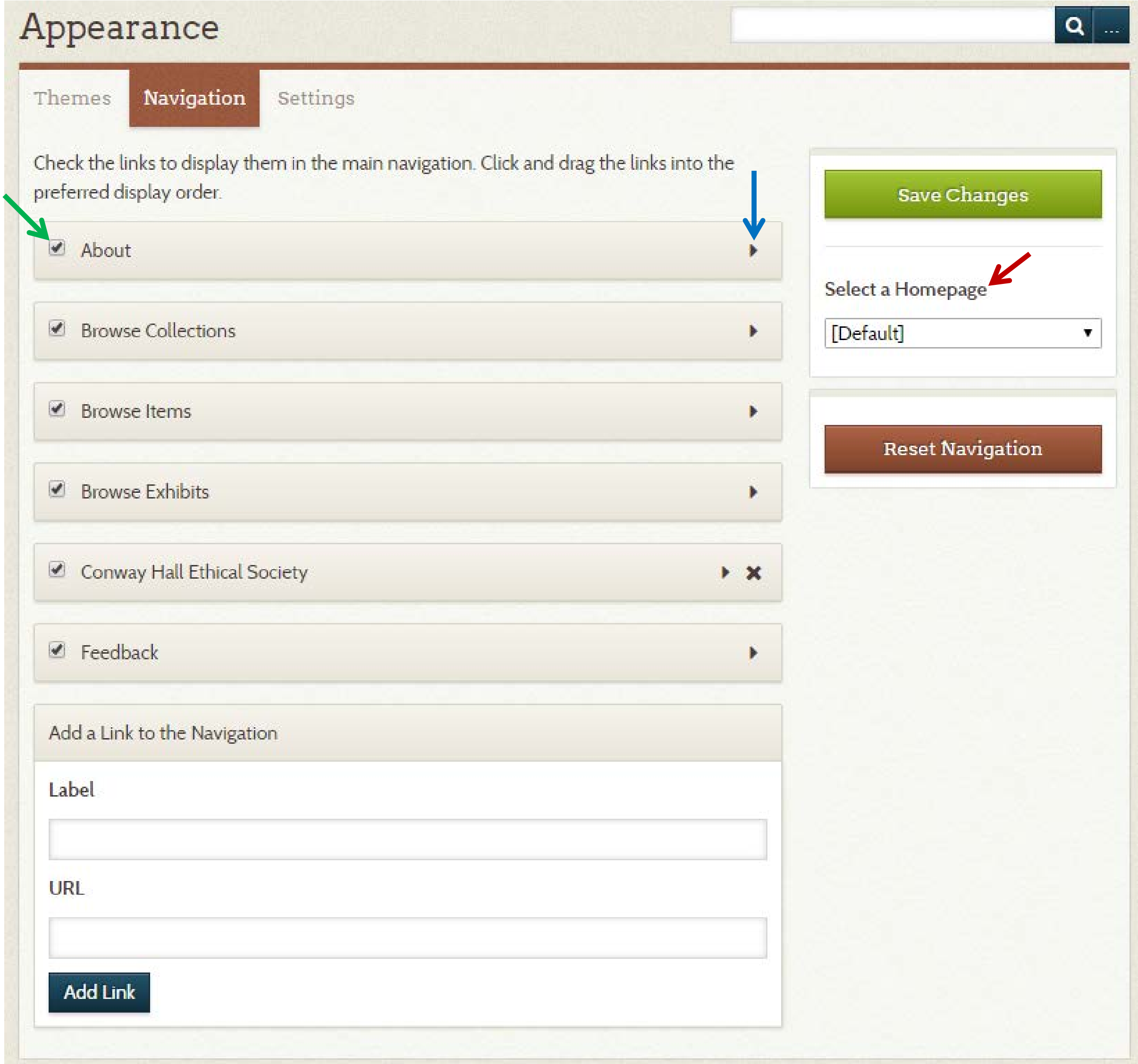


Fig. 5 Navigation Configuration

In the navigation menu you can:

- Select the home page (in the drop down menu at the right – red arrow in diagram)
    - This is currently set to [default]
- Set the order of the left hand (navigation) menu on the live website by dragging and dropping the links into the preferred display order (see figure 6 below for live site example)
- Set which of these navigation pages appear in the left hand menu by ticking or unticking the checkboxes (green arrow in diagram)
- Add links to the left hand menu (include URL and label and click 'add link')
- Change labels on links (click on small arrow at right [see blue arrow in diagram] and edit 'Label' field)

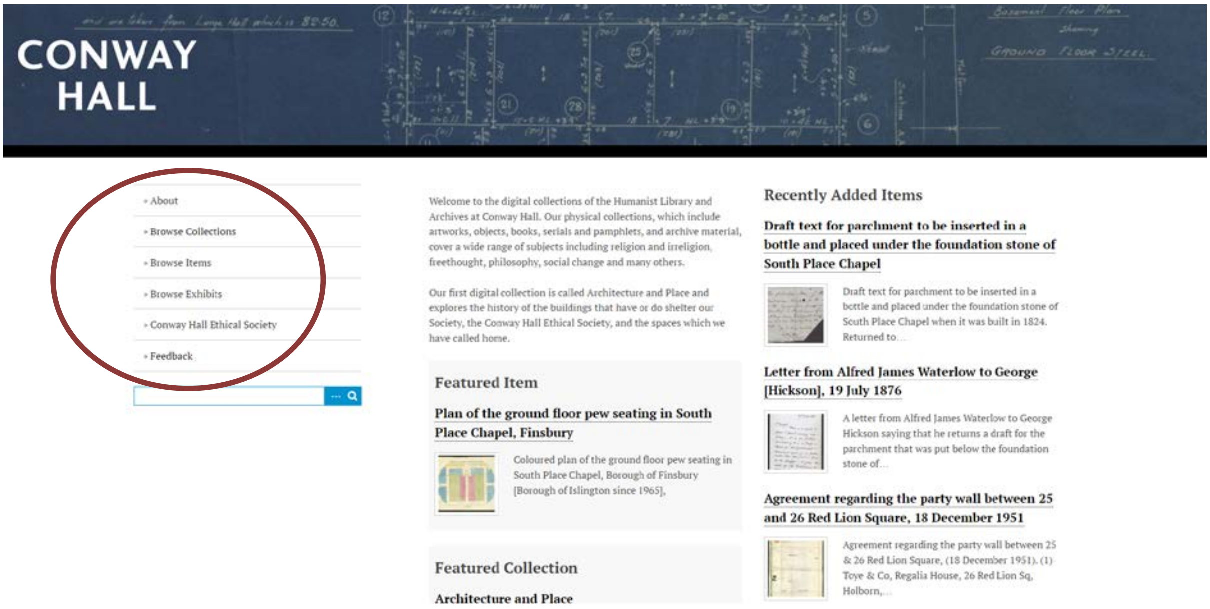


Fig. 6 Navigation Menu on Live Site

Browse pages ('browse items' etc) are created automatically and are included here. Other links are for simple pages that have been created or links directly added to the navigation menu (such as the Conway Hall link).

Settings (Appearance menu)

The 'Settings' tab of the 'Appearance' menu includes details around derivative size constraints and display settings.

Setting	Configuration details
Fullsize image size	Set to 600 pixels
Thumbnail size	Set to 200 pixels
Square thumbnail size	Set to 200 pixels
Results per page (admin)	Set to 20
Results per page (public)	Set to 10 (any more requires quite a bit of scrolling by the user which is to be minimised)
Show empty elements	Unticked
Show empty set headings	Unticked

Users

The user configuration menu is relatively small. Currently the site administrator (Library, Archives and Digitisation Assistant) is the only 'Super' user. Both Sophie (Library and Learning Manager) and Olwen (Cataloguer) are set as 'Admin.'[11] 'Super' access is required to access the Settings panel at the top of the manage website Dashboard page and thus be able to edit the plugins, appearance, user or settings menus. Changing the roles of users can be done by using the drop down menu to the right of their name and clicking submit.

Deleting users is done by checking the remove box to the right of their name and clicking submit. Adding a user requires the person's email address and setting their role/level of access and clicking

[11] https://omeka.org/codex/User_Roles

invite at the bottom of the page. Be sure to let people know that they will need to create their own (free) omeka account before the link they are emailed will work.

API keys (found below users' names) are currently unused.

Settings

This general settings menu includes five tabs including:

1. General
2. Search
3. Element Sets
4. Item Type Elements
5. API

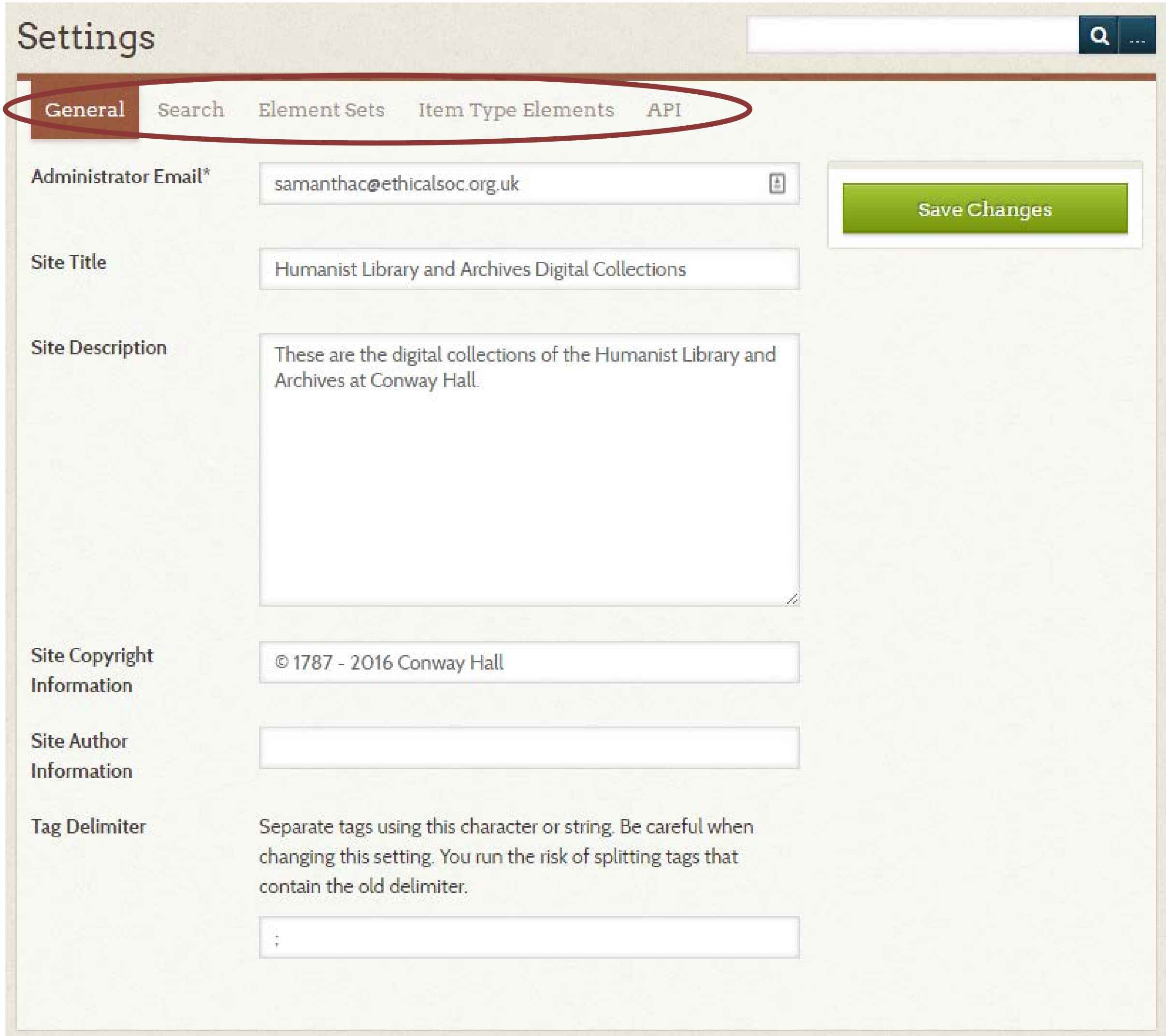


Fig. 7 General Settings Menu

General

Setting	Configuration details
Admin email	Currently set to Library, Archives and Digitisation Assistant's email address. Be sure to change this if the admin person changes.

Site title	Set to Humanist Library and Archives Digital Collections
Site description	Brief description of website
Site copyright information	Set to © 1787 - 2016 Conway Hall. Be sure to change at the end of each year.
Site author information	N/A – leave blank
Tag delimiter	Set to ';' rather than the default comma as we use commas in our tags. Do not change.

Search

Tick all the search record types to be searched at this point. If, because of the quality of the PDF OCR, you do not want files to be indexed for searching and thus viewed then untick this option.

After adding new items to the collection/s click on 'Index Records' to ensure they are findable when searching.

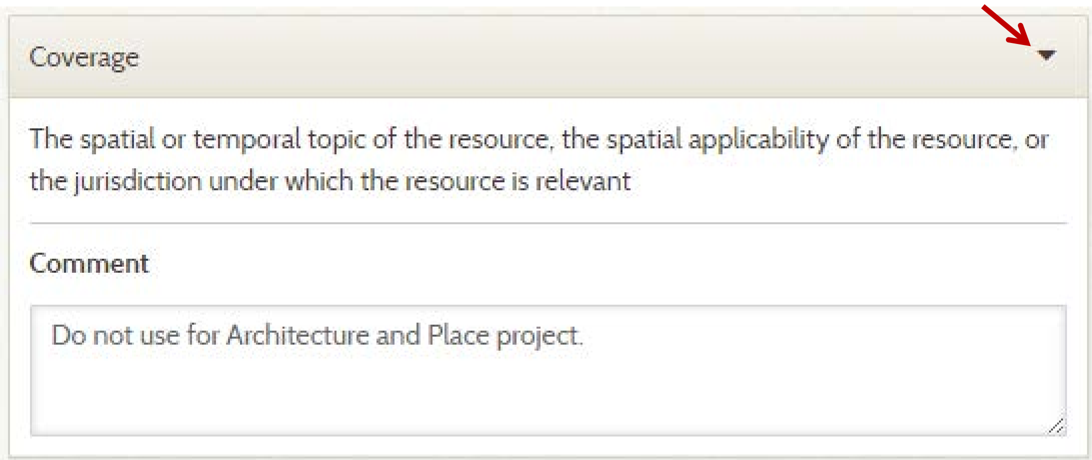
Element Sets

Currently there are two sets included in the element sets; Dublin Core and PDF Text. Dublin Core is likely the only set you will need to edit.

In this menu you can do two things:

- Change the order of the elements by dragging and dropping the links
    - The order of the element set is the order they appear on the item/collection description pages. This is unlikely to need changing.
- Add comments to particular elements
    - Currently only the final three elements (Coverage, relation and source) have comments that principally say do not use or do not use for the *Architecture and Place* project. These comments appear nearby to the elements on the ingest pages on Omeka (see figure 8 below).

To be able to do either of these actions, click on 'Edit' below the element set name. To add comments click on the arrows to the right of each element name you intend to edit (see figure 8). Be sure to click the 'Save Changes' button when you have finished editing.



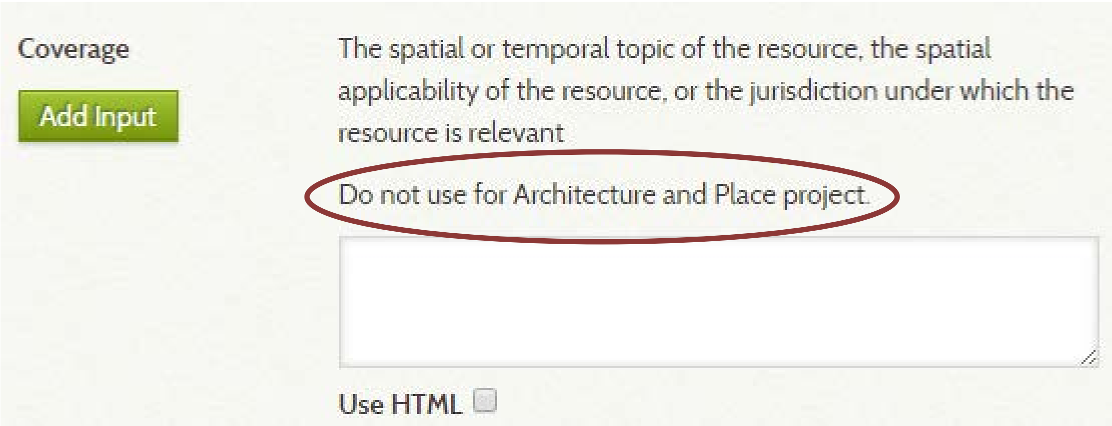


Fig. 8 Example of a comment added to an Element via the Element Sets Menu and how the comment appears on an ingest page

Item Type Elements

These have not been currently edited at all by us and are unlikely to require editing in the future. Please note from the description at the top of the page what is required to reorder the item types.

If changes are required, the elements may be deleted (by clicking on the X at the top right of the element name and then clicking on 'Save Changes') or have their descriptions changed (by editing the current description and clicking on 'Save Changes').

API

This menu allows you to configure the API. We do not currently need this functionality so the 'Enable API' option is unticked. If migrating the data to a new platform then this option will most likely need to be implemented.

Administration Menu

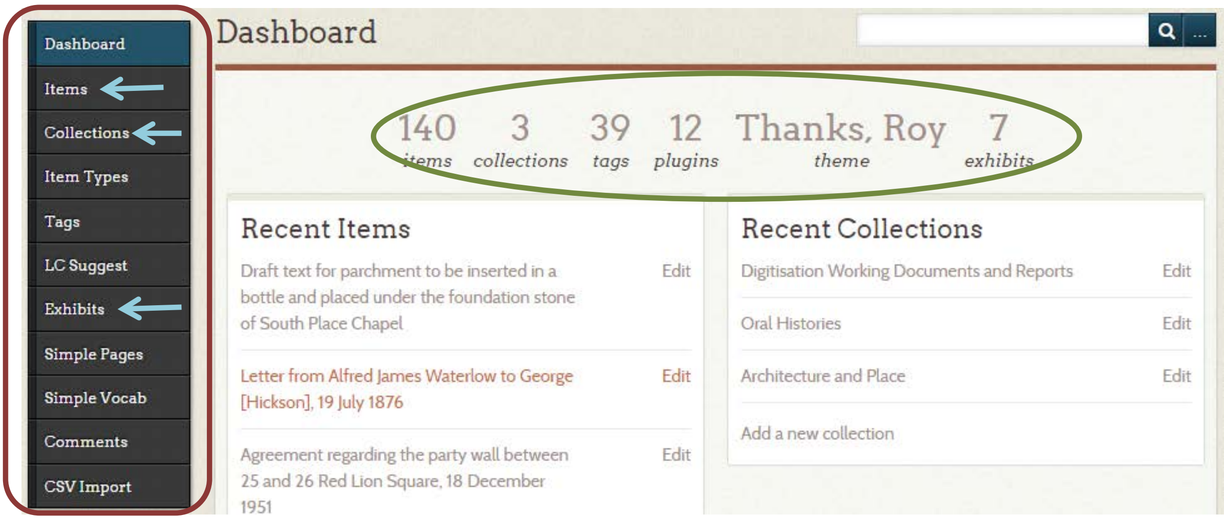


Fig. 9 Administration Menu

On the dashboard the left hand administration menu currently contains a number of links that allow you to: see an overview of the website (dashboard); browse, search and add material (items, collections and exhibitions); explore, add and edit metadata (item types and tags); view and edit controlled vocabularies (LC suggest and simple vocab); create and edit simple pages; as well as import files (CSV import). Several of these will be explored in fuller detail in the ingest process section below (items, collections and exhibitions, indicated by light blue arrows in figure 9) but the rest are described here.

Dashboard

This page gives an overview of the content and backend of the website such as the number of items, collections, tags, plugins and exhibitions that it contains or uses (see green oval in figure 9). It also shows recent items and collections (with edit buttons) and you can add a new item or collection by clicking on the appropriate button below each recent item or collections list.

Item Types

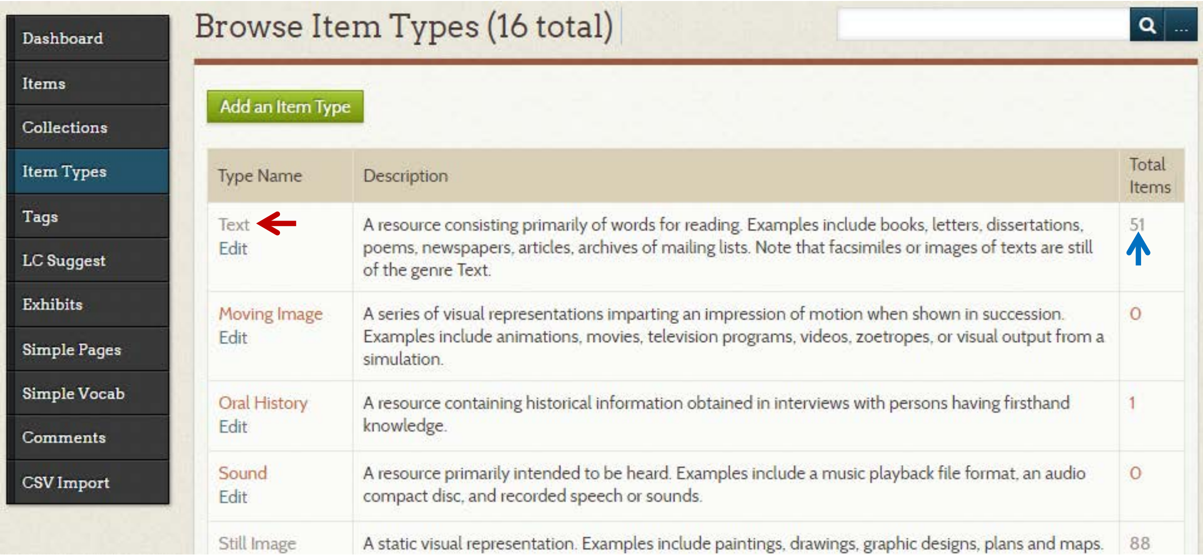


Fig. 10 Item Types Menu

There are sixteen default item types in Omeka that are used to describe items, collections and so on. By clicking on an item type (red arrow in figure 10) you will see the item type description, elements included in the type, recently added items of that type and the total number of items of that type (see figure 11 below). From the main item type page, you can click on the total items number on the right of an item type (blue arrow in figure 10) and browse all items of that particular type.

There is the functionality to add more items types if they are required but we do not foresee this being needed. If this functionality is required then help can be found on the Omeka.net website.[12]

[12] http://info.omeka.net/manage-item-types/

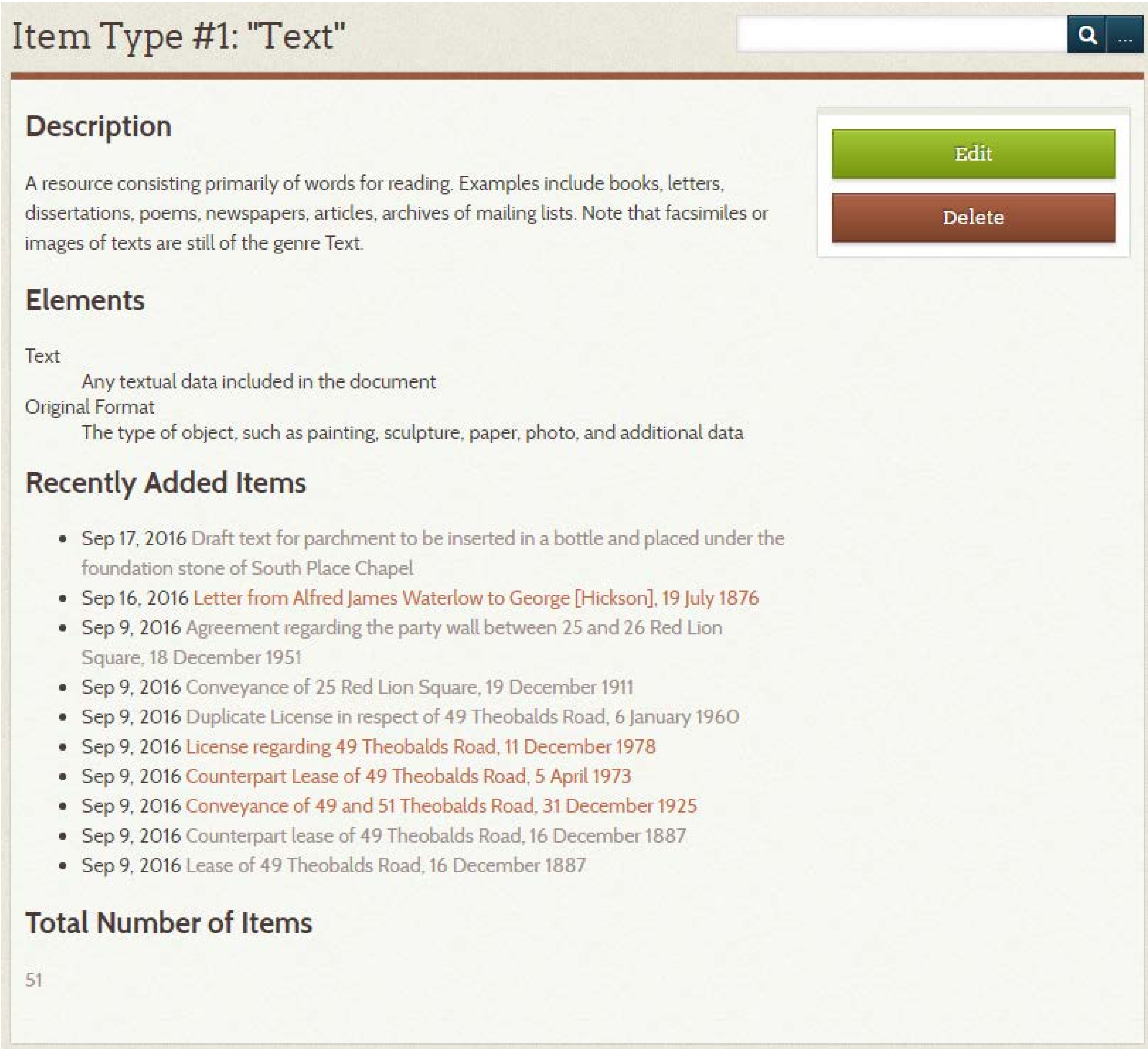


Fig. 11 Example of an Item Type summary page

Tags

The tags page (see figure 12 below) shows you the tags used throughout the website and the frequency of that usage. You can sort the tags by most frequent, least frequent, alphabetical order or by most recent by using the buttons at the top of the page. You can also limit the tags shown by record type by using the drop-down menu (only items are tagged at the moment but this may change in the future).

A description of how to edit tags (for misspelling, deletion etc.) is also included on this page. Be careful with deletions as deleting a tag here deletes it site wide. If you want to remove a tag from an item or collection then remove it from the tag tab for that particular item/collection.

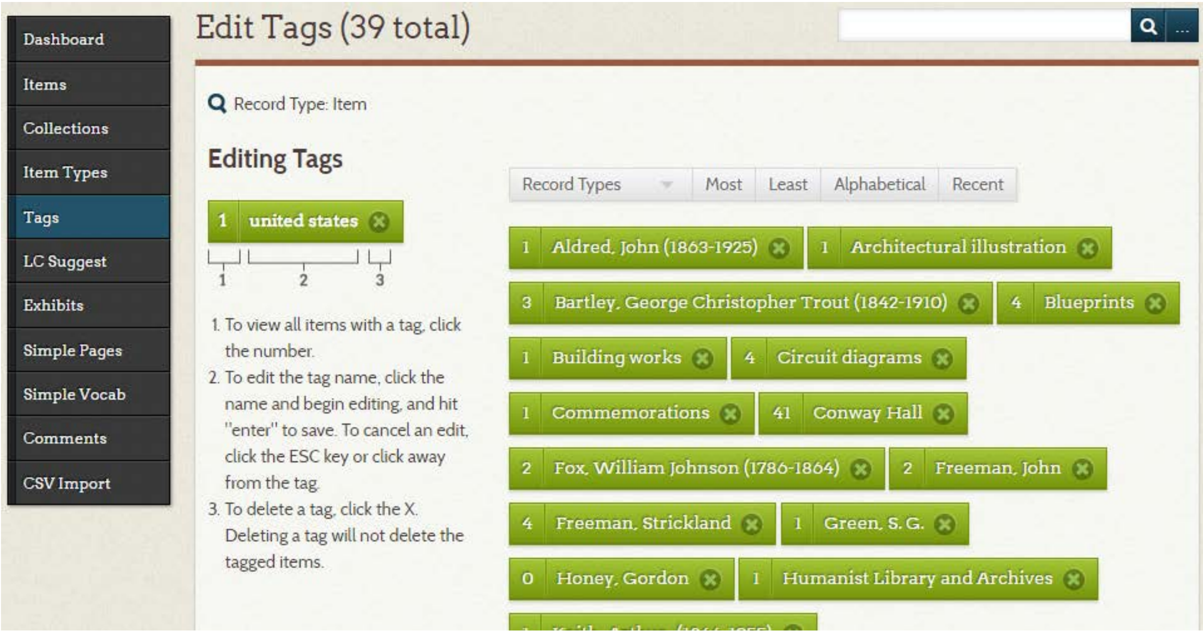


Fig. 12 Tags

LC Suggest

This menu item was added by the LC Suggest plugin. You can choose an element from the drop-down menu and then set an authority or vocabulary/ies to that element using the lower drop-down menu. Click ‘Edit Suggest’ when done to save. The current assignments are show in the table below the authority/vocabulary menu.

LC Names are used for the creator, contributor and publisher fields. LC Subject Headings is used for the subject field. The MARC List for Languages is used for the language field.

You cannot add new authority/vocabulary terms to these authorities either in this menu or in the appropriate field when editing an item or other content page.

Simple Pages

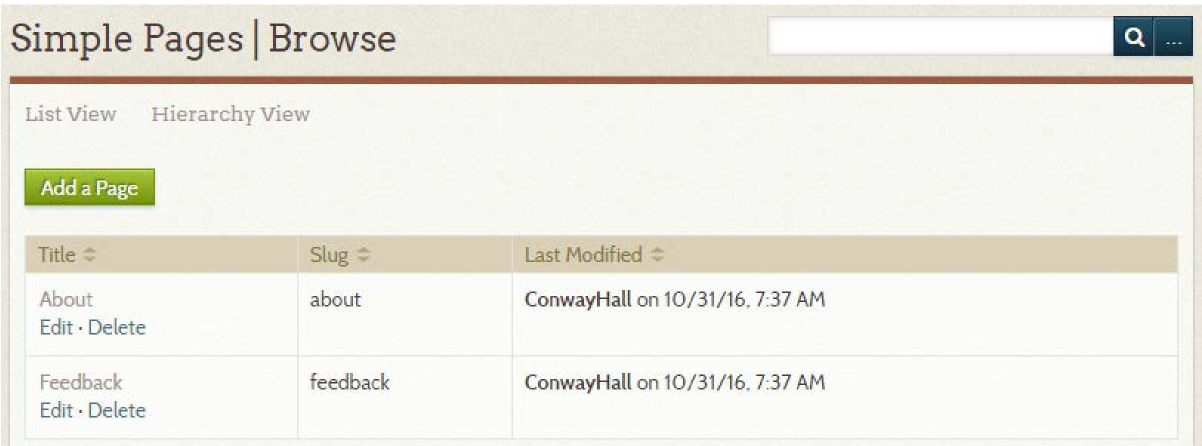


Fig. 13 Simple Pages

This menu item was added by the Simple Pages plugin. The Simple Pages Menu shows the current list of simple pages (presently this includes ‘About’ and ‘Feedback’) in List view or Hierarchy view.

You can add a simple page by clicking on the ‘Add a page’ button or delete an existing page by clicking on ‘Delete’ below the appropriate page.

For simple pages you can add:

- Title – required
- Slug – part of the URL for this simple page. Make sure it’s all in lower case and uses dashes for spaces
- Use HTML editor – tick the checkbox if you need to include HTML code
- Text – click on HTML to edit in HTML view

On the right hand side of the simple page edit page there are buttons for saving, viewing (to preview) or deleting. You can set the parent page and the order (if there are several simple pages with the same parent page). To publish the page you must tick the ‘Publish this page?’ checkbox and then the ‘Save Changes’ button.

Simple Vocab

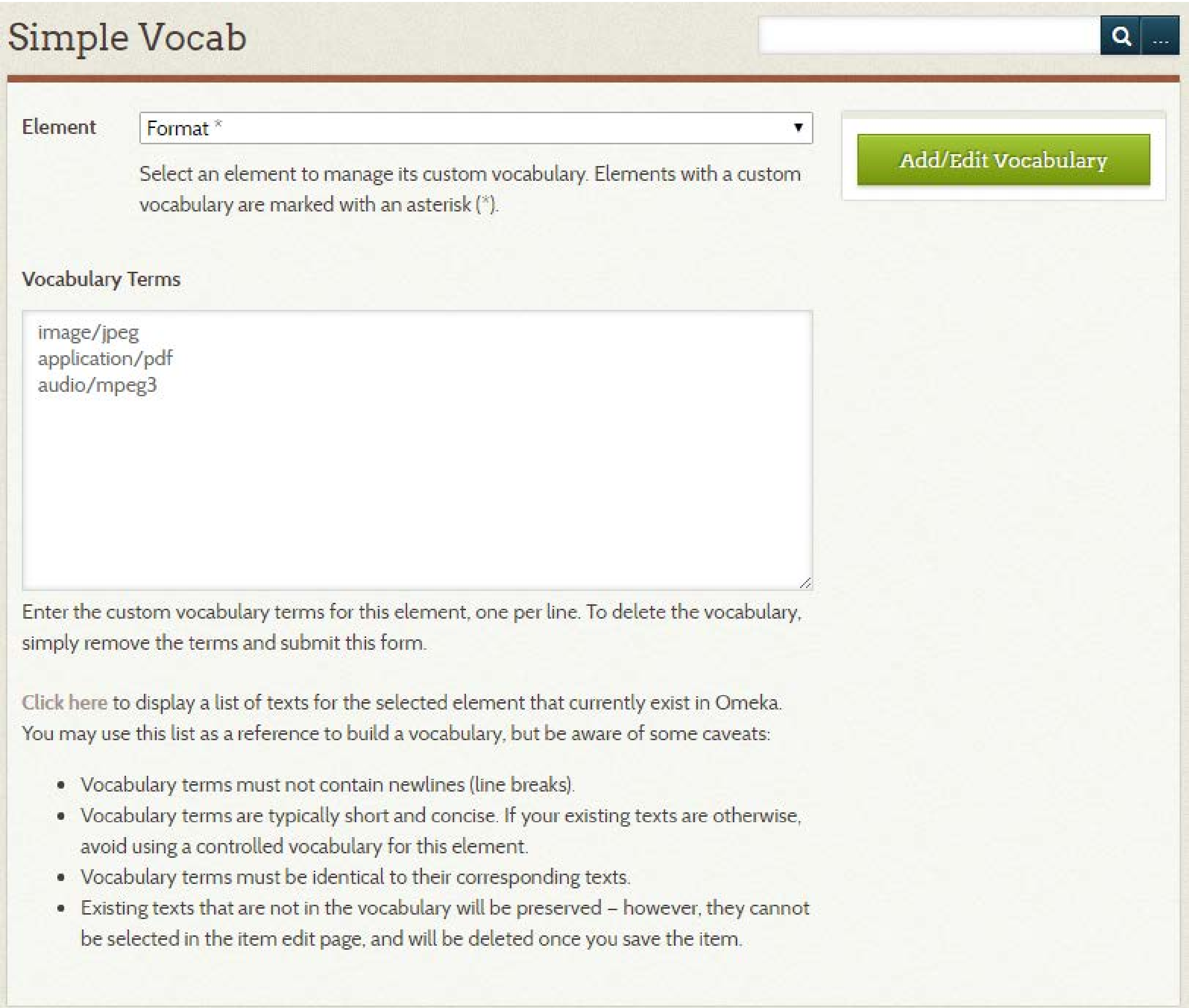


Fig. 14 Simple Vocab example showing terms for Element ‘Format’

This menu item was added by the Simple Vocab plugin. On this page you can add or edit your own controlled vocabulary terms for elements. Instructions for adding/editing a controlled vocabulary for an element is given on the page and you can click on the 'Add/Edit Vocabulary' button to save changes. You can also click on a link ('Click here') to display how many times terms have been used for the selected element.

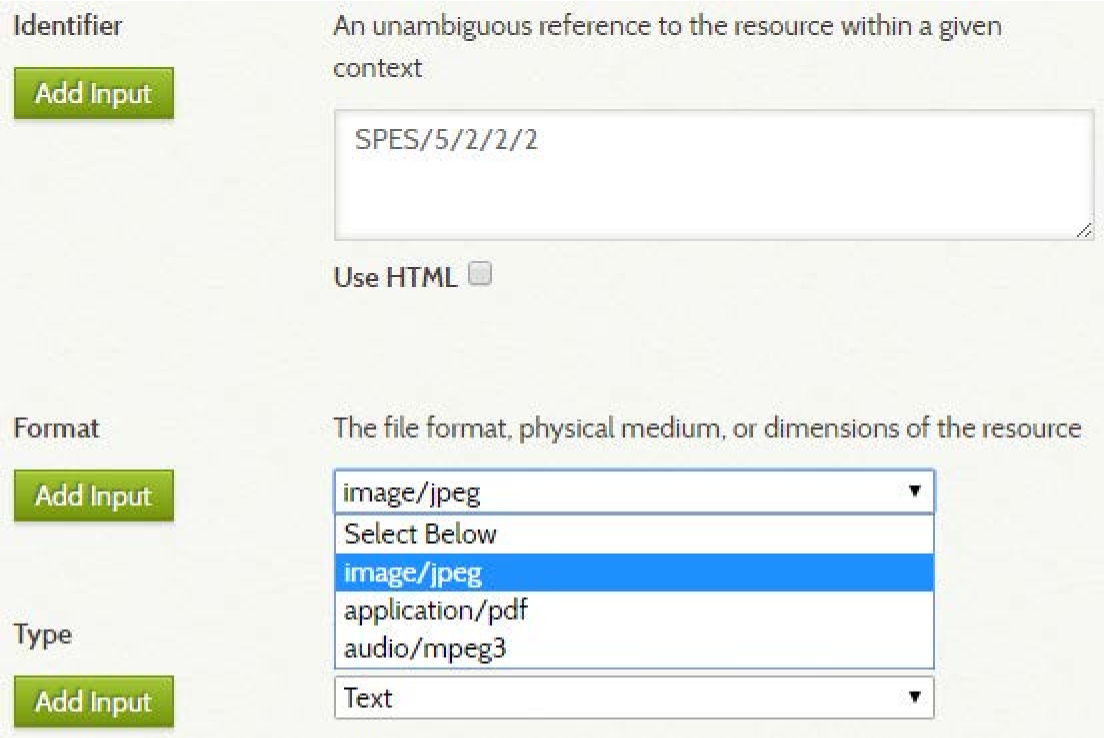


Fig. 15 Example of Simple Vocab use

Please note that when Simple Vocab is used that the text box for the relevant element in the item or collection DC edit page disappears and is replaced with a controlled vocabulary drop-down menu so only use this for elements with a very few set terms (see figure 15 for an example). For our installation of Omeka Simple Vocab is used for the fields 'format' and 'type' only. The terms for these fields come from well-established vocabularies.[13] Currently there are only three in 'format' but more can be added if they are required (see Miller textbook and the metadata guidance document).

Also note that Simple Vocab supersedes LC Suggest so if you have both in use for a field only the Simple Vocab options will appear (in a drop-down menu).

CSV Import

This menu item was added by the CSV Import plugin. It has not been used as yet but may be used if migrating records from Heritage to Omeka. More details on this plugin can be found online.[14]

Ingest Process

The ingest process for Omeka is as follows:

1. Create collection/s;
2. Add items; and then
3. Create exhibits drawing on collection items.

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[13] Miller, Stephen J. *Metadata for Digital Collections: A How-to-do-it Manual*. London: Facet Publishing, 2011.
[14] http://info.omeka.net/csv-import/

It is **absolutely important** to undertake browser testing (in both desktop and mobile browsers) to ensure that everything displays correctly and as expected. This can be done as each step is undertaken and is it also recommended to browser test a sample of items and exhibitions at the end of the ingest process as a final test before launching the project online.

Collection Creation

The collections menu can be accessed via a link on the left hand administration menu in the dashboard view of the Conway Hall Digital Collections website. From here you can edit existing collections by clicking on the 'Edit' link below the collection name or you can add a new collection using 'Add a Collection' button.

Each collection has its own associated DC metadata and so the metadata guide may be used to determine how each field should be formatted and used. A collection requires:

- Title
- Description
- Creator (for Collections this will be 'Humanist Library and Archives')
- Date (year of digital collection creation)
- Publisher ('Conway Hall Ethical Society')
- Subject (If LC Suggest does not work for collection creation then you can find LC Subject headings elsewhere).[15] For multiple subjects, click on the 'Add Input' button below the Subject field heading to add a new subject (see figure 16 below). For each new subject click on the 'Add Input' button and add the subject to its own textbox

A collection may also have contributor/s, perhaps partners or other creators, and this information may also be included. Collection rights are unlikely to be defined; most collections will be made up of diverse items with different rights in use. Other metadata fields may be used as appropriate (such as language for a text collection) but the 6 fields listed above will certainly be adequate for the majority of collections.

To the right of the metadata there are two checkboxes below the 'Add Collection' or 'Save Changes' button; the 'public' and 'featured' checkboxes (see figure 16 below). With these unticked the collection is saved in draft form. 'Public' is self-explanatory; 'featured' adds the collection as an option for content in the featured collection box on the website homepage.

[15] http://id.loc.gov/authorities/subjects.html

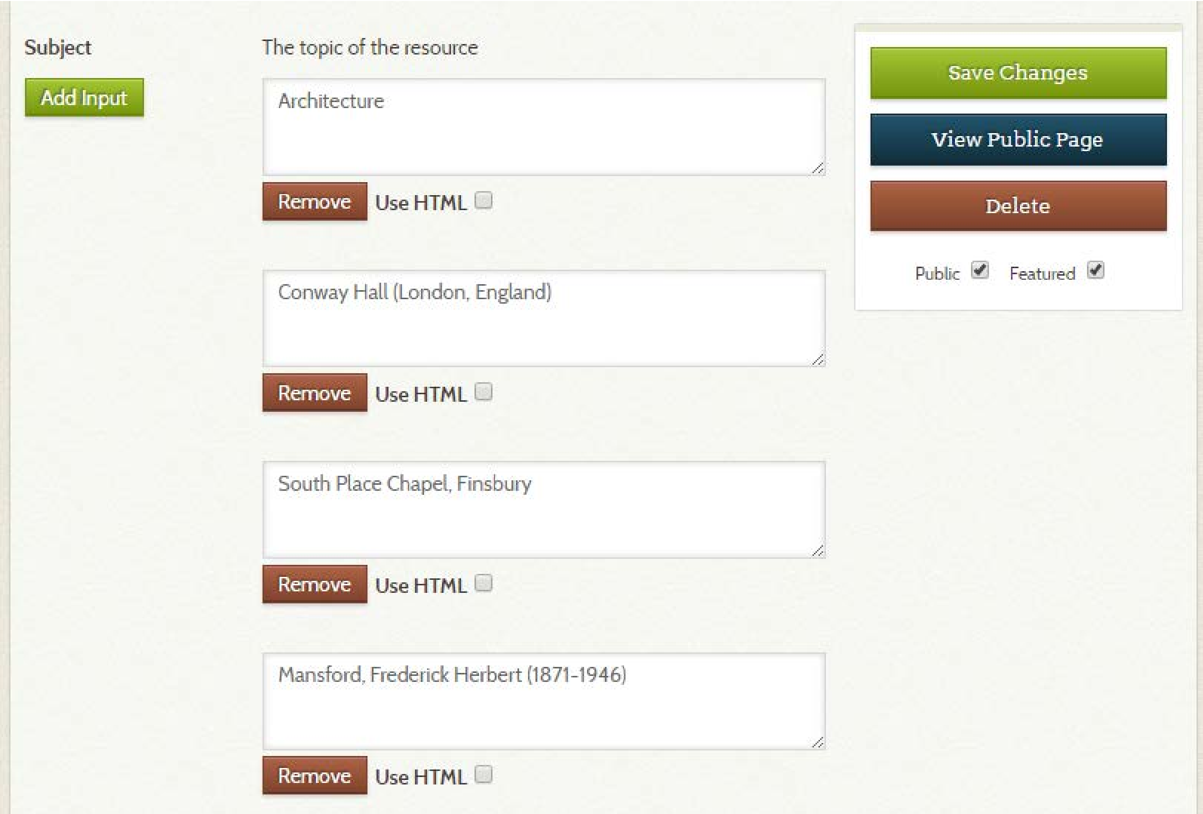

Fig. 16 Example of multiple Subjects applied to a Collection; also shows Save/View/Delete buttons and Public and Featured tickboxes

Add Items[16]

Fig. 17 Browse Item Page

[16]See http://info.omeka.net/add-items/ for a step by step general guide.

The ‘Browse Item’ page (see figure 17 above) can be accessed via the left hand administration menu by selecting ‘Items’. On this page you can use buttons at the top of the page to:

- Add an item
- Show details of items on the page (the details shown include the item description, the collection to which an item belongs and the tags assigned to it)
- Search items

You can also select some or all of the items shown on a page using the tickboxes to the left of an items title and use a number of buttons at the top of the page to:

- Batch edit
- Delete
- Quick filter to show only public, private or featured items.

Using the ‘Edit’ button after selecting the items you want to batch edit (see figure 18 below) will allow you to set items:

- To public or private
- To be featured
- To a particular item type (drop-down menu) or to remove that item type from selected items using a checkbox
- To a particular collection (drop-down menu) or to remove that collection from selected items using a checkbox
- To include particular tags
- To be deleted

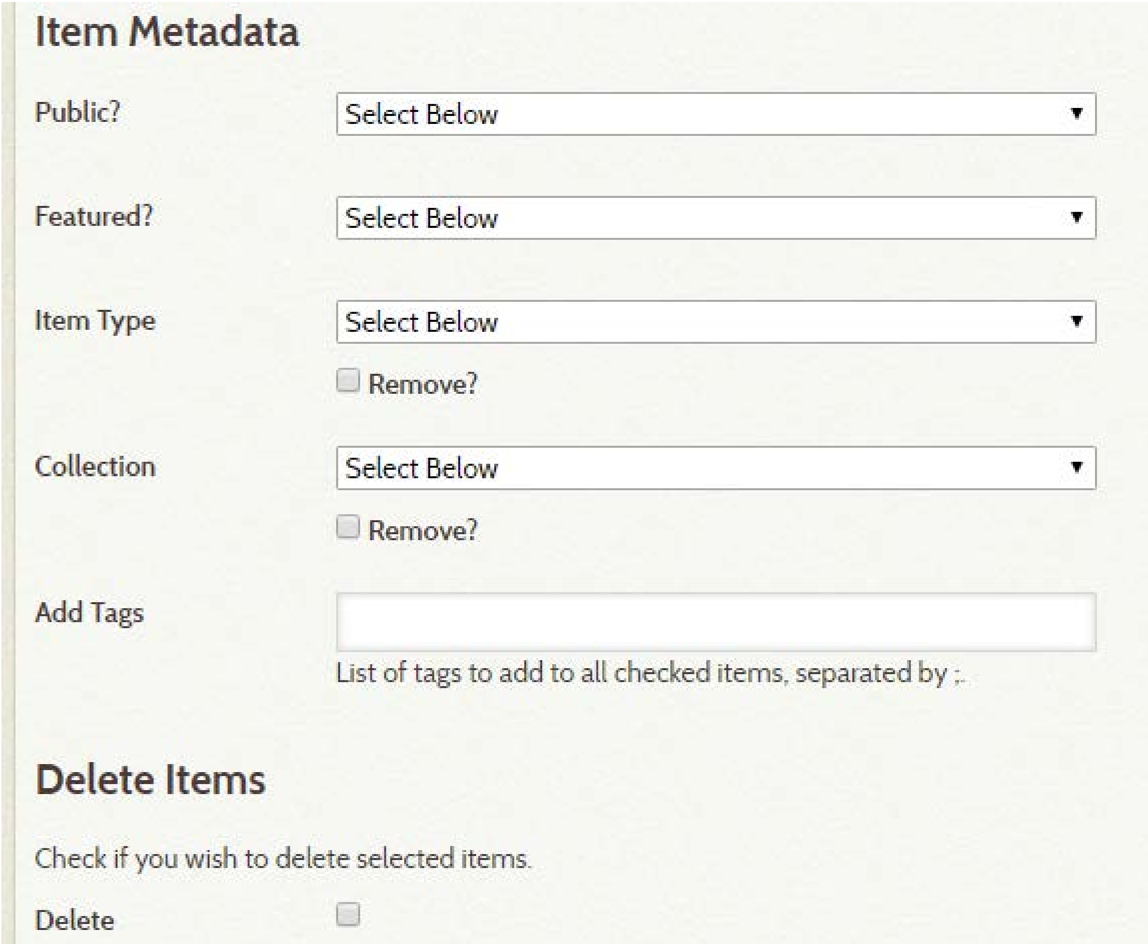

Fig. 18 Batch Item Editing

From the browse page you can also edit and delete existing items by clicking on the links below the item title.

Fig. 19 Add an Item Editing

The following description is to add a new item but much will be applicable to editing an existing item. After clicking on the ‘Add an Item’ button at the top of the ‘Browse Items’ page you will be taken to the ‘Dublin Core’ tab (see figure 19 above). This metadata can be created using the metadata guide.

The ‘Item Type Metadata’ tab is also included in the metadata guide. Choose from the drop down menu the appropriate type you wish to use and then use the guide to assist in filling in the associated elements. Currently the number of Item Types used are very few and so there is limited guidance given in the metadata guide. If using an Item Type not included in the metadata guide, consider the fields that exist for that item, the items you wish to include and use those fields that are the most appropriate for those items. Ensure consistency in field usage and document this in the metadata guide for future administrators.

The ‘Files’ tab is the next in the sequence. You may add multiple files to an item record and they will appear in sequence in the order in which you added them. Choose a file using the ‘Choose File’ button and navigating to the file you wish to use. If you wish to add multiple files then click on ‘Add Another File’ and repeat the process. You must click on ‘Add Item’ (or ‘Save Changes’ when editing) to save the files to the record.

Once a file has been added and saved you can drag and drop the file to change the sequence in which the files will appear on the item’s webpage, edit a file (meaning add DC metadata to it) or delete a file. We do not currently include DC metadata for files as this was not deemed necessary (much of it would just duplicate information held in the item’s DC metadata). If you click on a file link it will take you to a page where a large amount of technical and administrative metadata (see figure 20) is displayed down the right hand side. All of the technical metadata is encoded in the file itself when it was created and then displayed here; the administrative metadata is created by Omeka when the file is added.

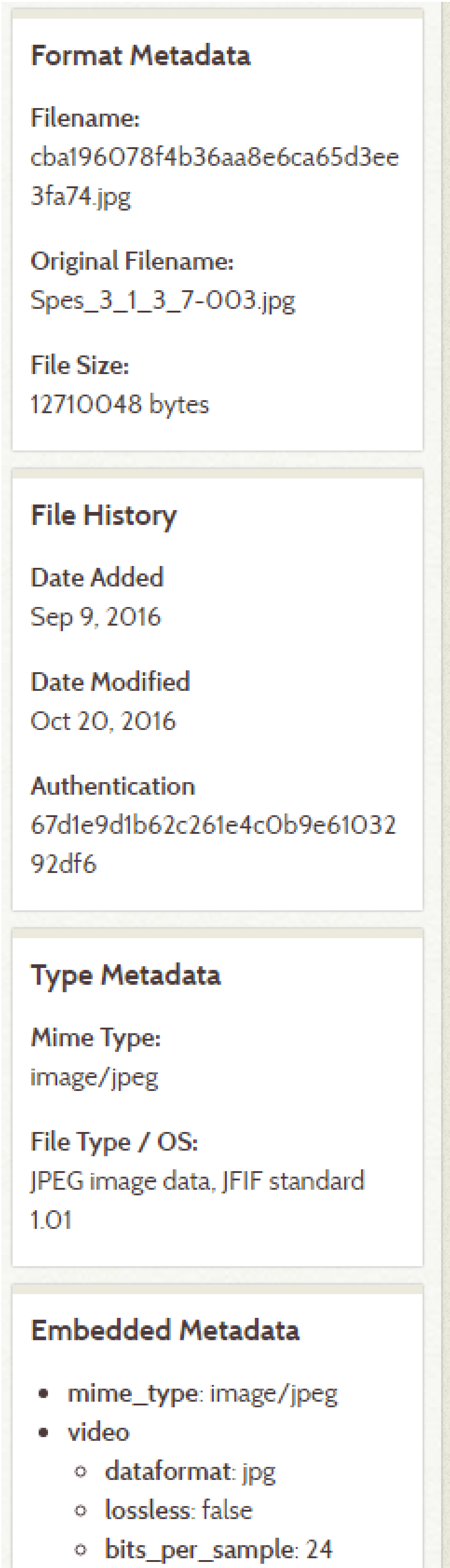

Fig. 20 Example of File Technical and Administrative Metadata

Although adding DC metadata to each file has not been done in the case of the *Architecture and Place* project (see figure 21 – solid arrows indicate what has been included; dashed-lined arrows indicate what has not) this functionality may be useful for future projects.

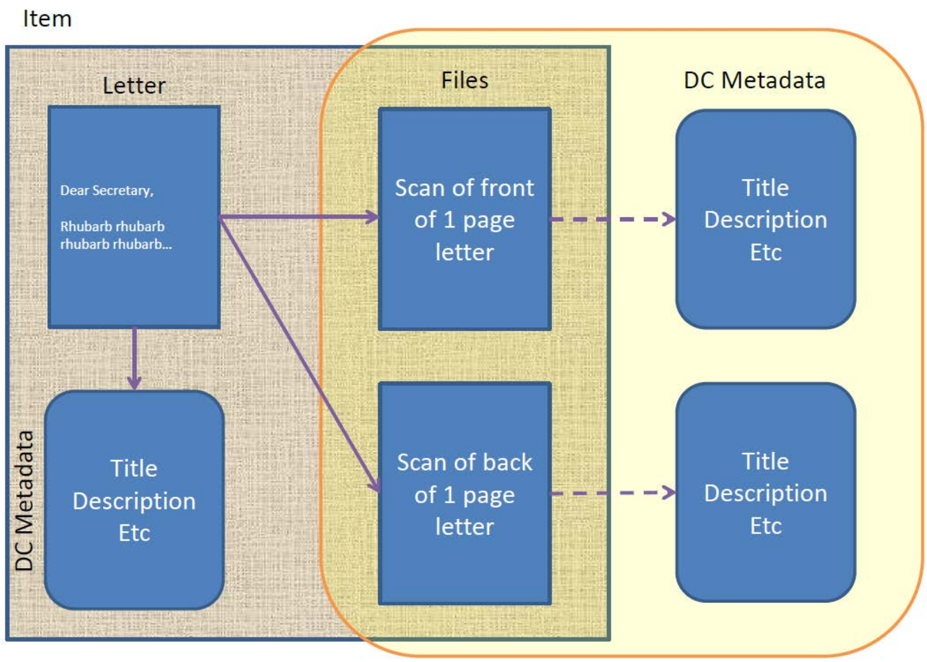

Fig. 21 Metadata included in *Architecture and Place* project

The 'Tag' tab allows the addition of tags using a semi-colon (;) to separate each tag. Click 'Add Tags' to save tags. Guidance for tagging can be found in the metadata guide.

For each item, you may then make them public and/or a featured item using the checkboxes found at the top right of the editing pages underneath the 'Add Item' button (or 'Save Changes,' 'View Public Page,' and 'Delete' buttons when editing an existing item). Lastly be sure to assign each item to a collection using the drop-down menu below the checkboxes. Make sure to save often while editing so you do not lose your work if the browser crashes.

Finally, when adding a new collection be sure to consider changing which collection/s, items and exhibits are featured. Also consider changing the background header.

Exhibit Creation

Exhibits within the Omeka platform can be used to provide contextual information on the collections hosted therein. Simple pages may be used for this too but they do not take advantage of the display options for selected items that can be used within the exhibit pages. The Exhibits page is accessed via the left hand administration menu.

Like the collection and item browse pages, you can edit, delete and create exhibits on the exhibit browse page.

The metadata for Exhibit pages is quite different to that used for collection and item pages – it is not in DC form.

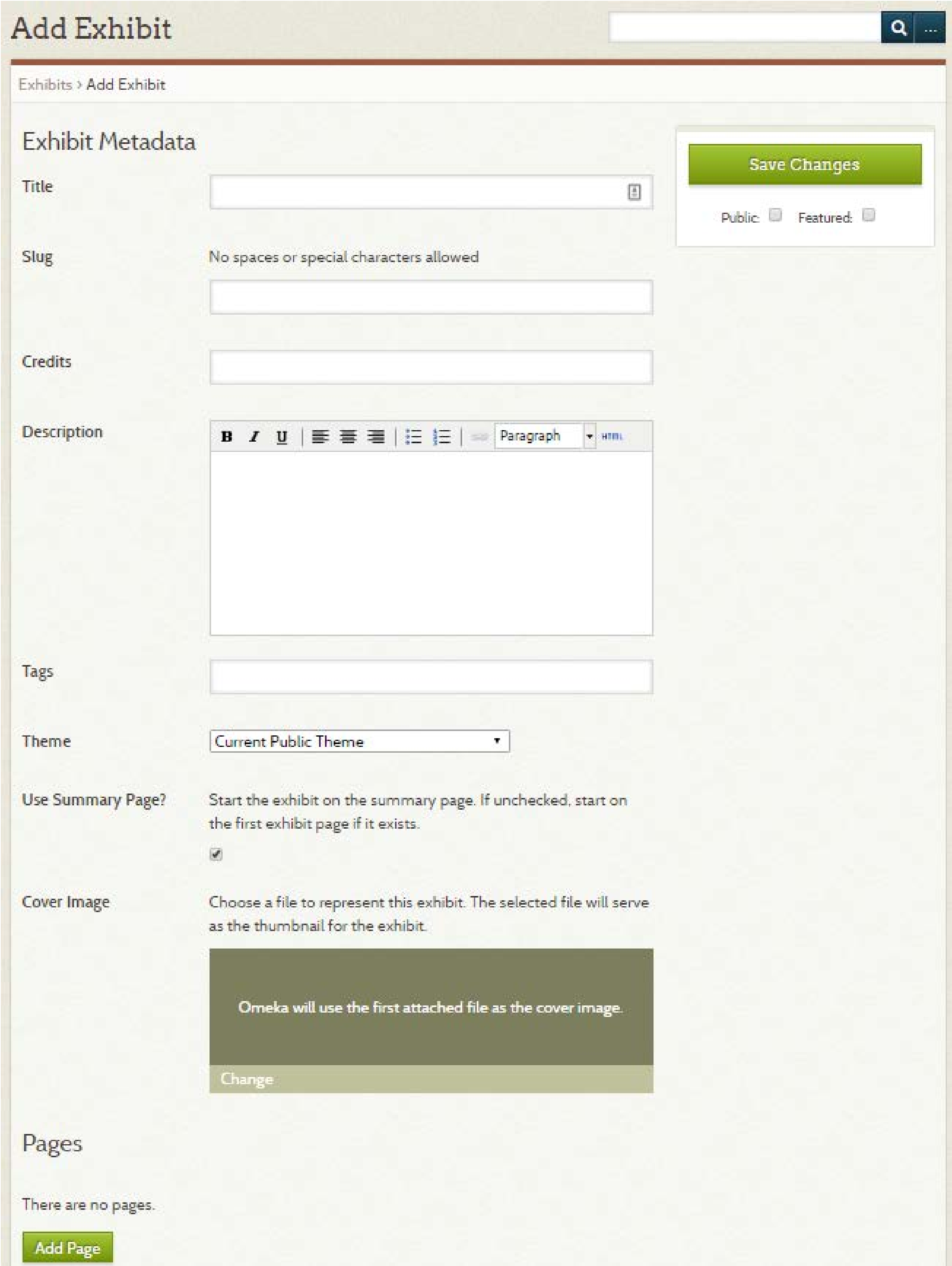

Fig. 22 Creating an Exhibit

The 'fields' used for exhibits include:

- Title - required
- Slug (use lowercase letters and dashes for spaces) - required

- Credits (use your full name in normal order ie. first name last name [rather than the order for names used for the DC fields)
- Description (exhibit summary, can use HTML if required by clicking on HTML button in textbox) - required
- Tags
- Theme dropdown menu (leave this set to 'Current Public Theme') - required
- Use Summary Page? Checkbox (untick this as the current theme makes navigating from the summary page unclear. The summary page then is used to provide information on the browse exhibit page) - required
- Cover Image (if you don't want your exhibit to default to use the first image included in the exhibit, then you can set the Cover Image to another image by clicking on 'Change')

Below these fields there is the 'Pages' section. It will contain pages already created as well as an 'Add Page' button. You can reorganise existing exhibit pages by dragging and dropping a page to change the order.

Finally there are the 'Save Changes', 'View Public Page' and 'Delete' buttons at the top right of the create/edit exhibit page with the 'Public' and 'Featured' checkboxes which have been outlined above.

Adding Pages to Exhibits

The following description is for adding an exhibit page to an exhibit but much of it can be used as guidance for editing existing exhibit pages.

Each new page (see figure 23 below) has:

- A page title;
- A page slug;
- And content.

Content is organised into blocks. In this way you can choose (select layout) to have a block which is a mix of selected items and text, a gallery of items, just text or a singular file. As you create you can add blocks of content as required if you want to change format (from text to a gallery and so on). You could do this too for other types of formatting changes (such as significant changes in font type, size, etc).

Layout	Usage
File with Text	Can add any number of items (and include captions), text (and use HTML [HTML button next to dropdown menu above text box] for formatting) as well as set layout options at the bottom of the block – file position, file size and caption position. N.B. that these layout options will affect all items in this block. If you want to align an item to the opposite side then you will need to start a new block.
Gallery	Can add any number of items (and include item captions), gallery description (and use HTML).

	Layout options for gallery blocks include: Showcase file position, gallery position (only used if there is a showcase file), gallery file size (square thumbnail and thumbnail), and captions position.
Text	Text blocks have the text box only with the opportunity to edit in HTML.
File	Can add a number of files (including captions) but unlike Gallery layout cannot add a gallery description. Also images default to display as full size rather than square thumbnails. Layout options for file blocks include: file position, file size (full size, square thumbnail and thumbnail) and captions position.

While editing an exhibit page you can also use the Expand All or Collapse All links to the right of the Content heading to assist you when organising your exhibit page. When the page is completed it can be saved using either the 'Save Changes' or 'Save and Add Another Page' buttons at the top right of the page.

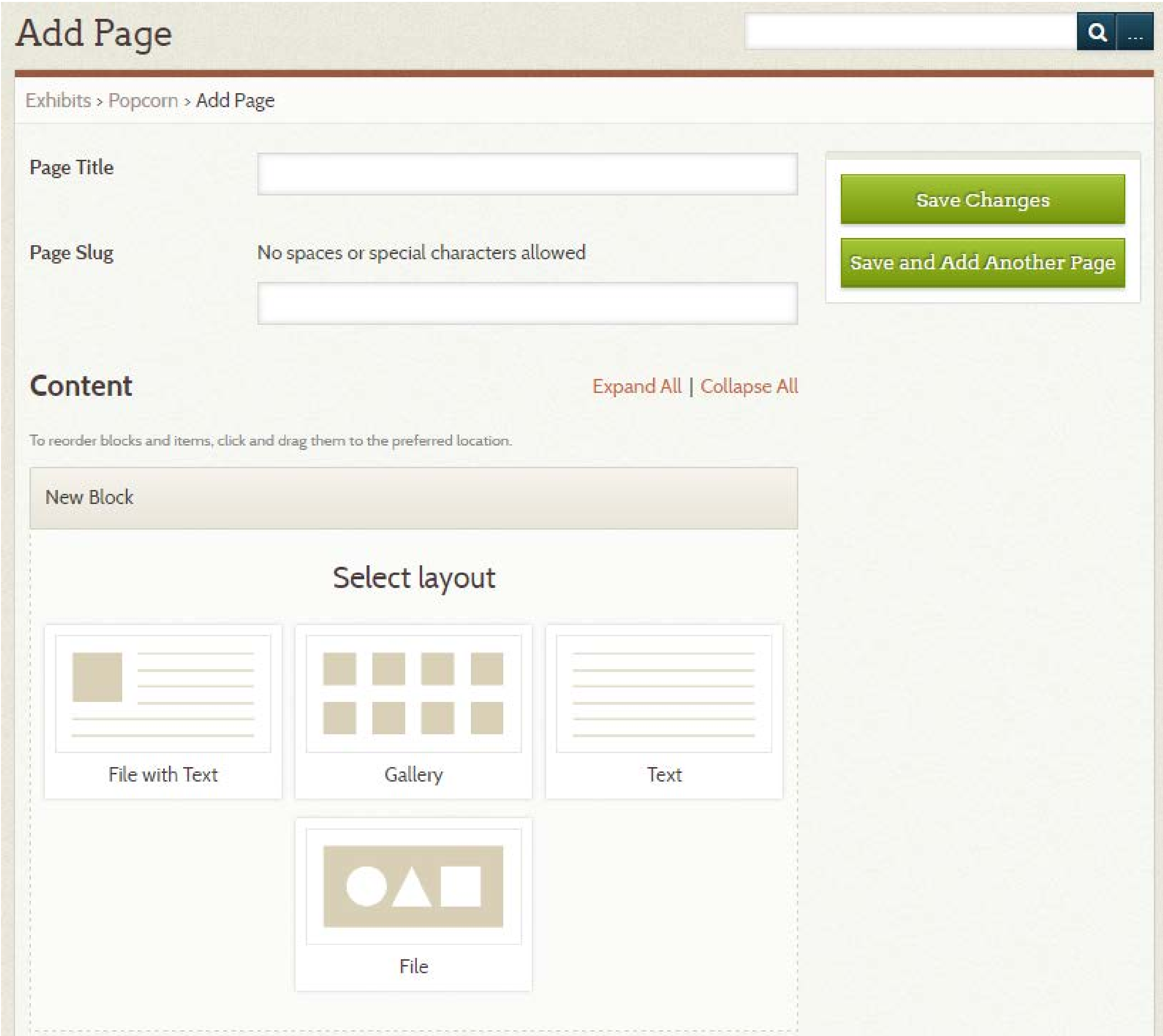

Fig. 23 Adding a Page to an Exhibit

Reflection

Reflecting on the digitisation project occurs throughout the project and beyond its public launch. Documenting the process and decision making while developing and implementing the project is to be recommended; do not wait until the project is launched to begin documenting as it can be difficult to recapture your thinking clearly at the time.

At project launch user evaluation can begin and be monitored. Evaluation of the project itself can begin after launch and the results of both sets of evaluation can be analysed while you develop your end of project report which summarises the digitisation process, issues and barriers encountered, decision making, lessons learnt and recommendations for future projects.

Documentation

The documentation to be undertaken throughout the project is covered thoroughly in the Expected Outputs section of this operational manual.

Ensure, by the end of the project, that your documentation covers:

- Decision making
- Process
- Reflection
- Any benchmarking set or followed
- Policy development

Evaluation

For the Humanist Library and Archives, when we considered evaluation:

- We wanted to build it in to our projects from launch, if not before
- We asked:
    - What do we want to get from it?
    - What do we do with it going forward?

User - Direct

User evaluation is still relatively uncommon within the digitisation field despite UX (User Experience) testing being prevalent in the field of IT and so it is somewhat surprising that it is not more fully utilised in the development of digitisation projects.

For our digitisation programme we have chosen to integrate direct user evaluation into our digitisation project/s from launch via an online survey requesting user feedback on the project. We will use this information to improve our website (where possible) in response to feedback, either positive or negative, as well as develop future projects around the themes approved of in the included consultation questions.

User - Indirect

In addition to directly gaining feedback from users we are able to use Google Analytics to undertake the more common evaluation used by digitising institutions and look at:

- Number of page views
- Number of new visitors

- Average duration of sessions
- Distribution of users

As well as other indicators of use to gain a better understanding of how the website is used.

As collections are added you will be able to use Google Analytics to evaluate your different digitisation projects collectively on the platform easily or page by page which will take quite some time. A collective comparison of new data post project launch may be compared to previous data but it may not be indicative of the impact of the new project and this must be stated in a disclaimer if this is the only statistical method used when reported.

Internal

To measure the success of the project you must check to see how well the project met the stated aims and objectives noted in the project plan.

As the *Architecture and Place* project was a pilot project with only a digitisation project timeline as a guideline it still had a number of general aims and objectives to be met and this is outlined in full in the end of project report. If writing a project plan, then in addition to general objects, such as scan selected items in a timely manner, you can include more specific goals such as: promote project to X number of electronic mail lists, have X number of new users to website within first two weeks of project going live, push students from integrated learning courses to new digitised collection and so on.

How well you meet these goals therefore can be evaluated to gain a fuller understanding of the success of the project and what could be done to improve projects in the future.

Both the documentation and evaluation is useful information to include when making grant applications to funding bodies; it demonstrates responsiveness to learning and to your audience which is often considered important by funders. It can also demonstrate your commitment to completing projects which can also be fundamental in successful applications.

End of Project Report

The final part of formal reflection is in producing an end of project report. This report will most likely be kept relatively private as this is the point where honesty is paramount; no glossing over errors or problems. Instead these must be highlighted along with the successes to ensure the opportunities afforded for learning are taken.

Outline:

- Your aims and objectives
- Summarise your project scope (and consultation if undertaken)
- Summarise scanning costs, timelines, quality and any damage caused by vendor
- Summarise item description work required and metadata details
- Expected outputs and how these were met
- Implementation of project
- Launch details

Answer the following:

- Did you meet your deadlines? If not, why not?
- Were you within budget? If not, why not?
- Did you meet your aims and objectives? If not, why not?

Summarise the problems or barriers encountered and how these were dealt with. Explicitly state any lessons learned from these experiences and make recommendations for future projects. For a pilot project there will be a number of lessons learned to be described.

Finally, summarise your project successes, any future activities and include your conclusions.

Final Notes

This document may be updated as needed but make sure to update the version number and save as a new file. In the new version of the document include a summary of changes made so these can be easily tracked across the versions.

Glossary

Term	Definition
Element	An element (also known as a field or property) captures an aspect of metadata about an item. For example, name, creator and so on.
Ingest	The process of adding content (including digital objects, metadata and so on) onto a digitisation platform.
Slug	A part of the URL that identifies a page in human-readable keywords.[17] In Omeka a large part of a page's URL is automatically generated; the slug however is editable.

[17] https://en.wikipedia.org/wiki/Semantic_URL#Slug