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Digital Project Planning

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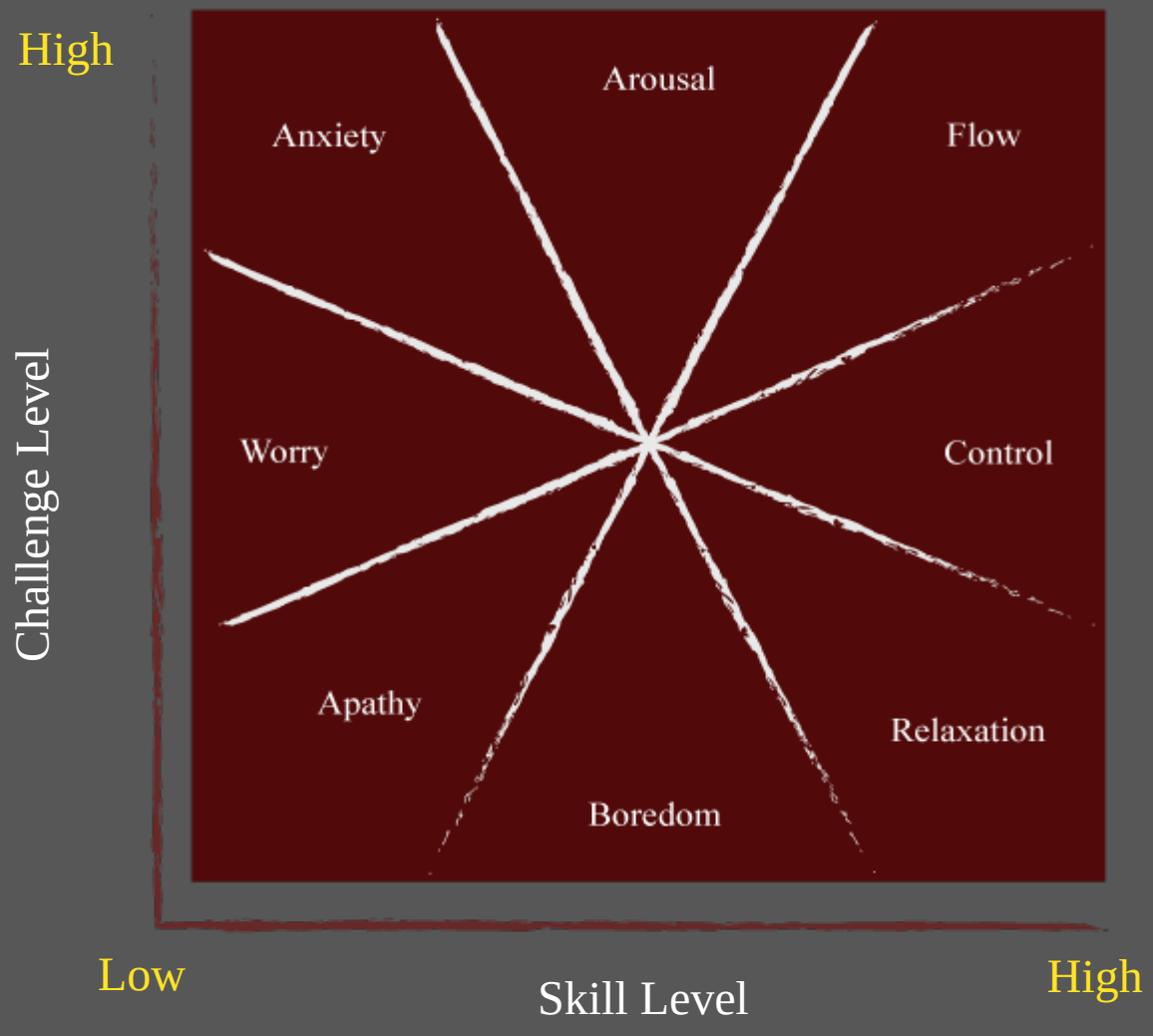
Project Planning

Tammy Troup, MHS Digital Services Manager

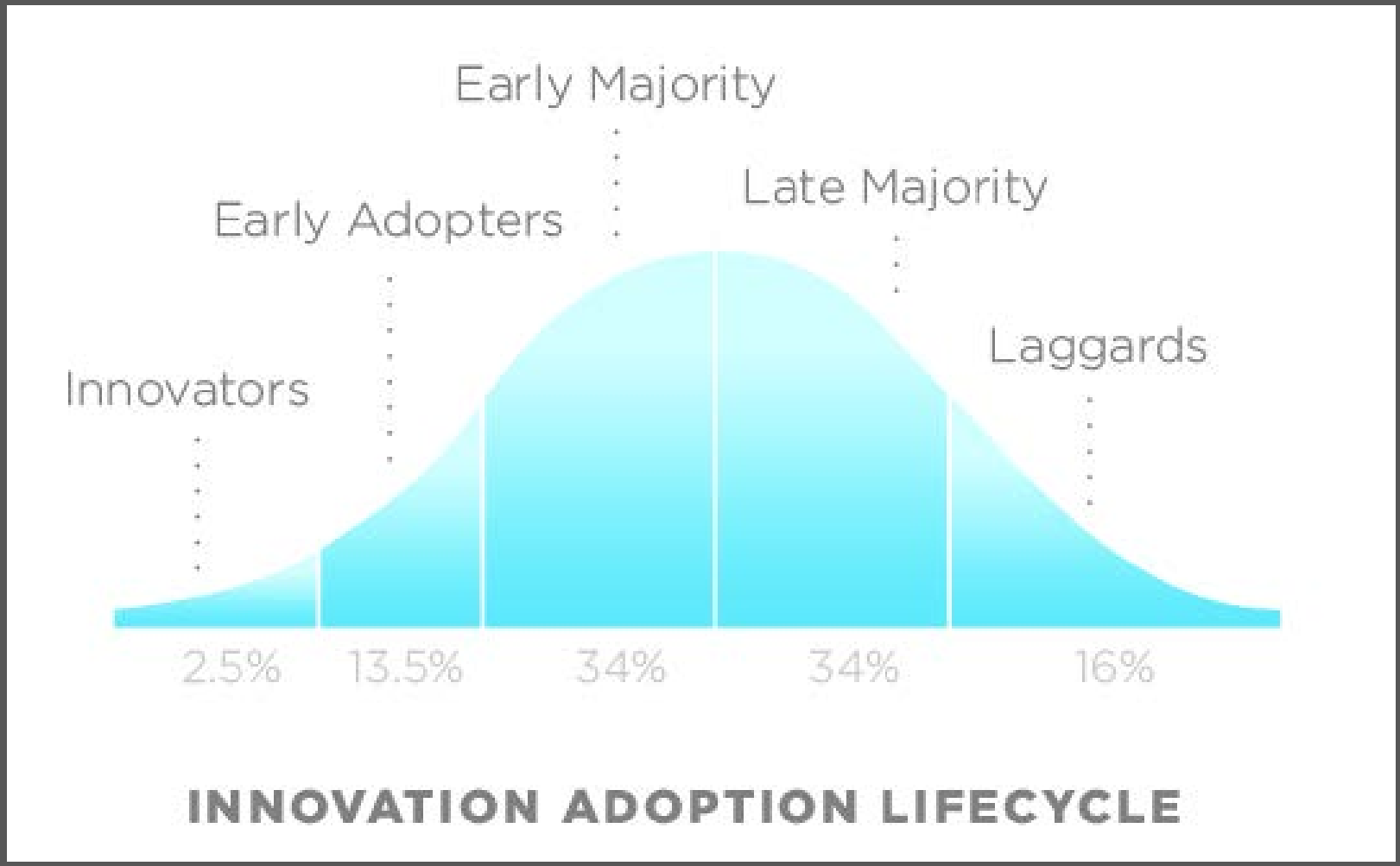
"Just Scan It… Digitization Dos and Don'ts"

SHRAB Workshop, September 22, 2016

Establish a shared vocabulary



Csikszentmihalyi, Mihaly. “Flow Model” *Flow: the Psychology of Optimal Experience.* Revised edition. New York: Harper & Row, 1997.



A graph of Everett Rogers Technology Adoption Lifecycle model. Drawn in OmniGraffle and then trimmed in Apple Preview. Retrieved 14 September 2016 https://en.wikipedia.org/wiki/File:DiffusionOfInnovation.png

Semantics

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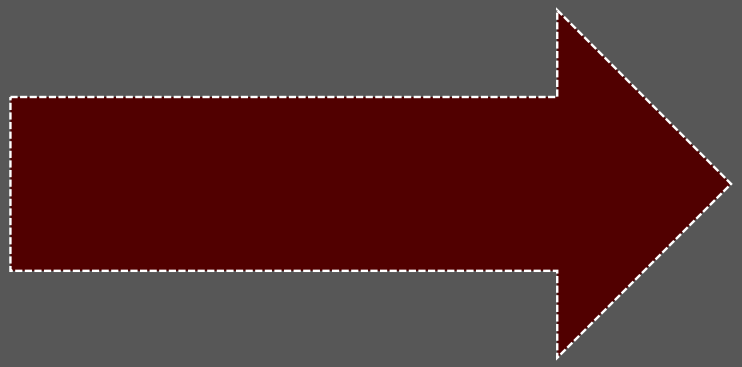

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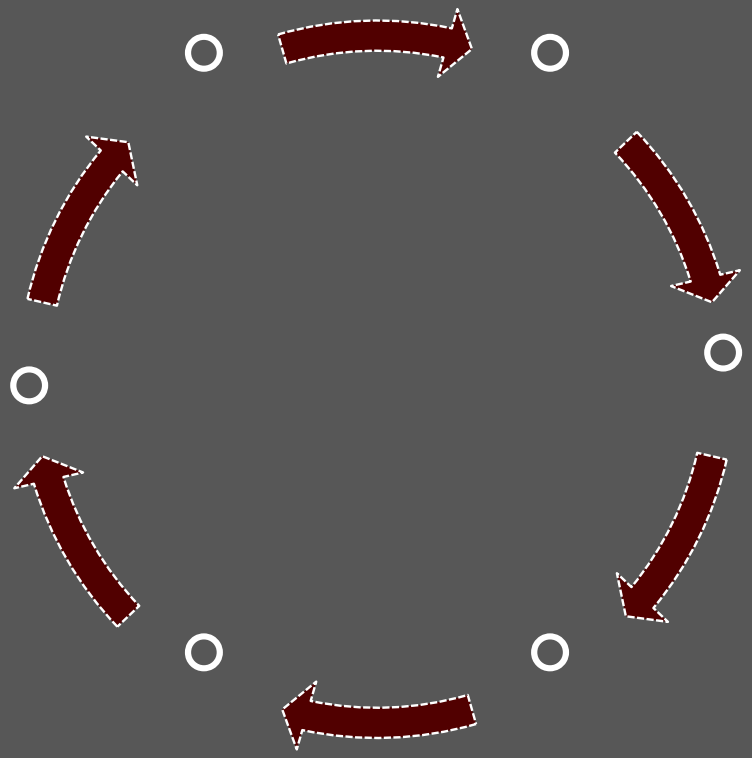

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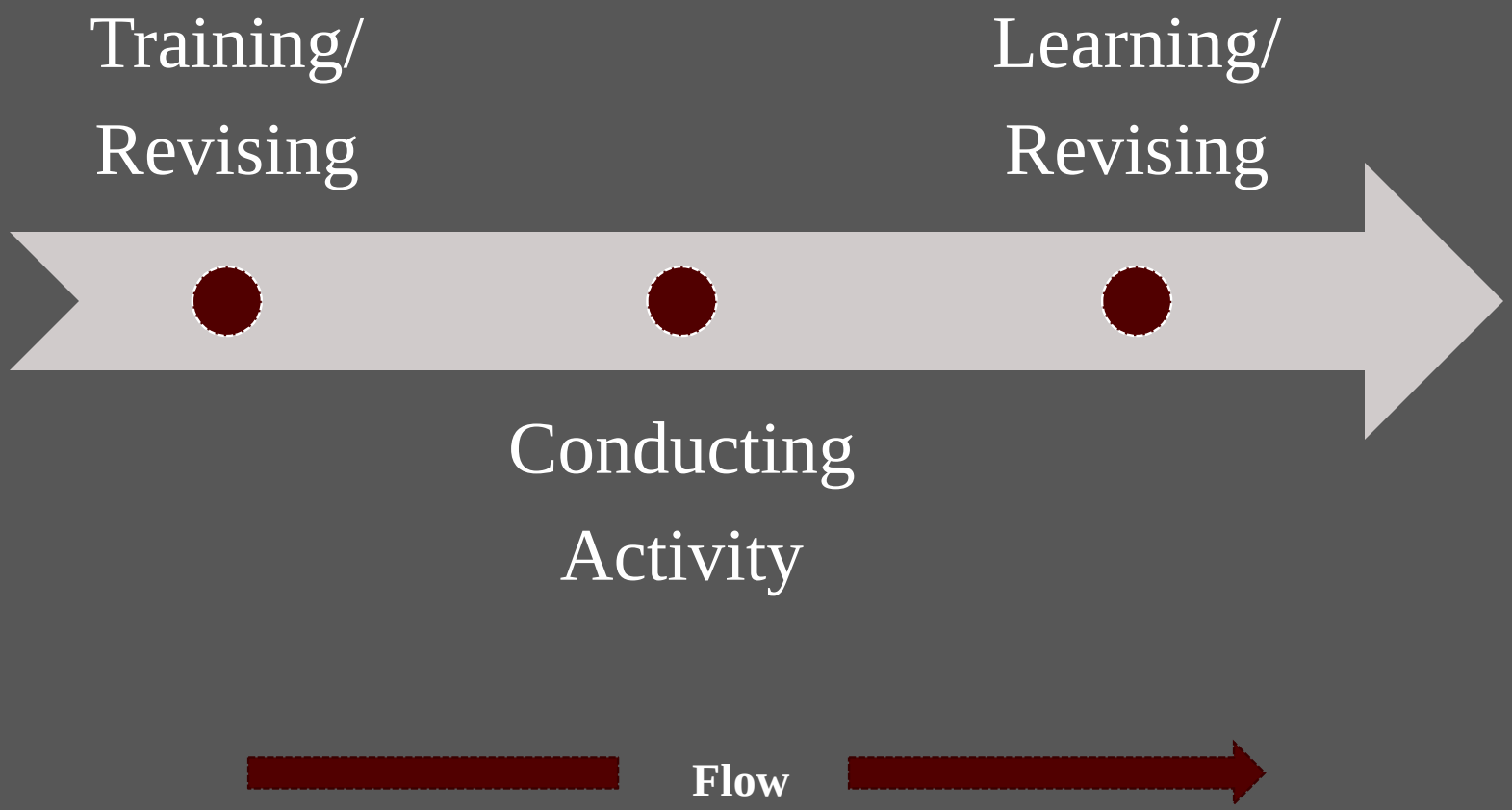


<project>Digital</project>

Planning + Processes =

PROJECT

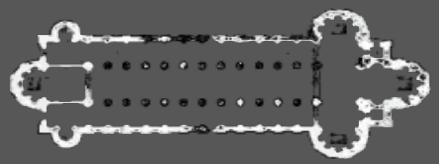
Planning for a project

/Plan/

An intention or decision about what one is going to do

Origin

Late 17th century: from French, from earlier *plant* 'ground plan, plane surface', influenced in sense by Italian *pianta* 'plan of building'.

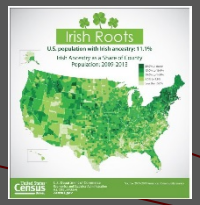


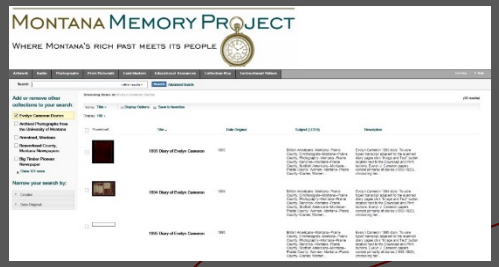
Basic Planning Steps

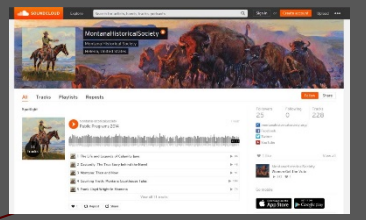
- Project Initiation
- Planning, Researching, and Documenting
- Project Implementation
- Project Conclusion
- Information and Knowledge Management

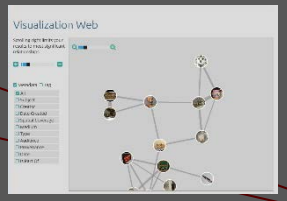
Project Initiation

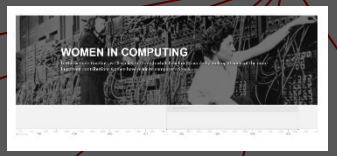
- Types of Projects

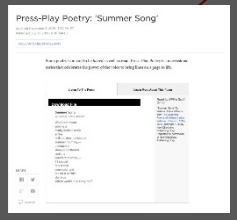


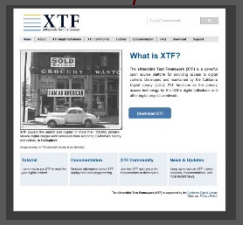


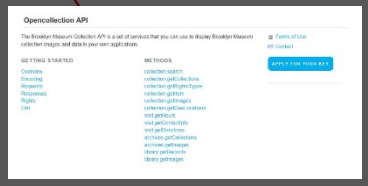






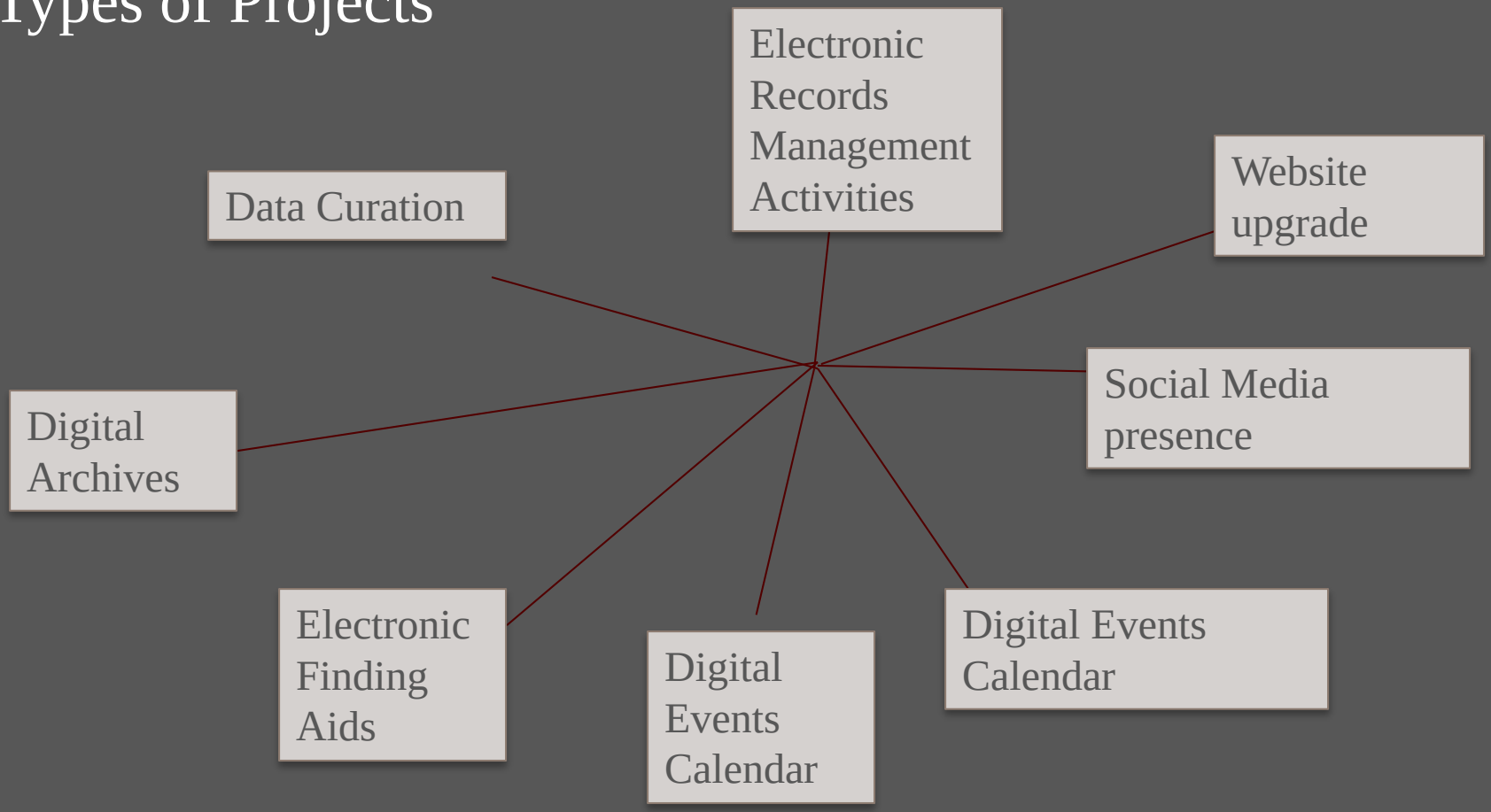






Project Initiation

- Types of Projects



Project Initiation

Refine

Project Initiation

Project Initiation

- Level of Commitment
  - Short-term exhibit or project
    - Establish a timeline
    - Determine level of documentation about information and knowledge management
    - Establish learning objectives and ways to measure success
  - Long-term exhibit or process
    - Ensure long-term institutional commitments are in place (staff, technological infrastructure, etc.)
    - Ensure projects are financially sustainable
    - Establish learning objectives and ways to measure success

Documenting

Administrative Info	**Title, Creator, Dates, Description, Purpose, Community Assessment, etc.**
Rights & Info Policy	Copyright, Risk Management, Scope & Domain, Selection
Tech & Information Management	Metadata schema, Folder hierarchy, File Naming Convention, File retention, Tech review
Project Management	Roles & Responsibilities, Communication, Workflow & Timeline, Launch, Marketing

Trobadours. German anonymous., s. XIV. Archiv für Kunst und Geschichte. Berlin.
https://commons.wikimedia.org/wiki/File:Troubadours_berlin.jpg

Implement the project

Construction of the dome. Catalog #952-636. ca. 1901. Montana Historical Society Research Center Photo Archives. Helena, Montana.

Project Conclusion

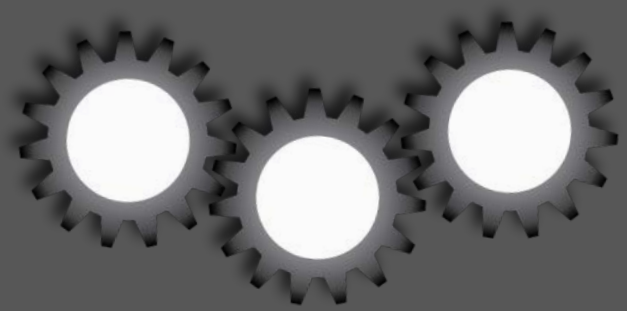
Processes of a Project

/ˈPRÄˌSES/

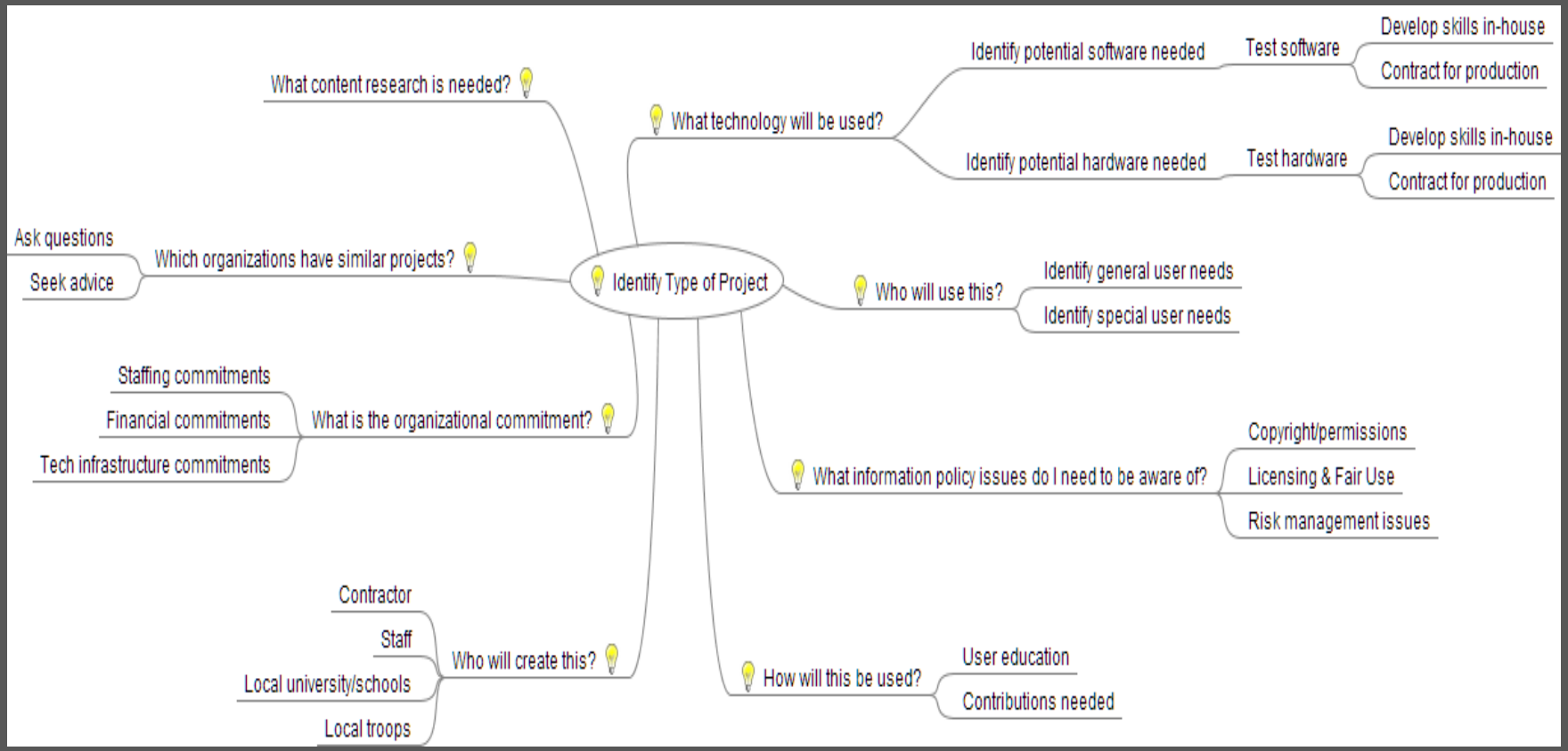
1. A series of actions or steps taken in order to achieve a particular end

Origin

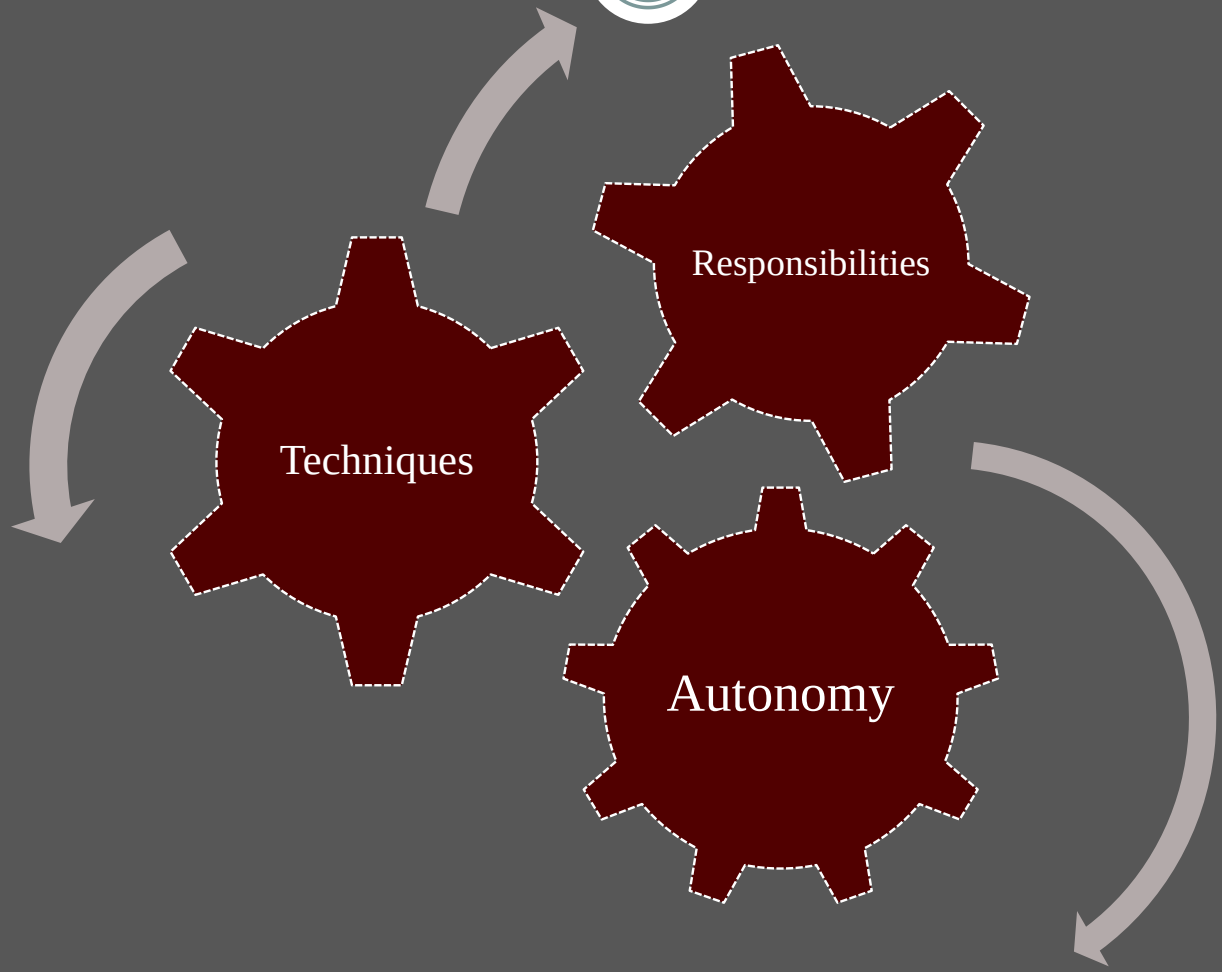
Middle English: from old French *proces*, from Latin *processus* 'progression, course', from the verb *procedere*. Current senses of the verb date from the late 19th century.



Outline Research Strategy



Training & Communicating

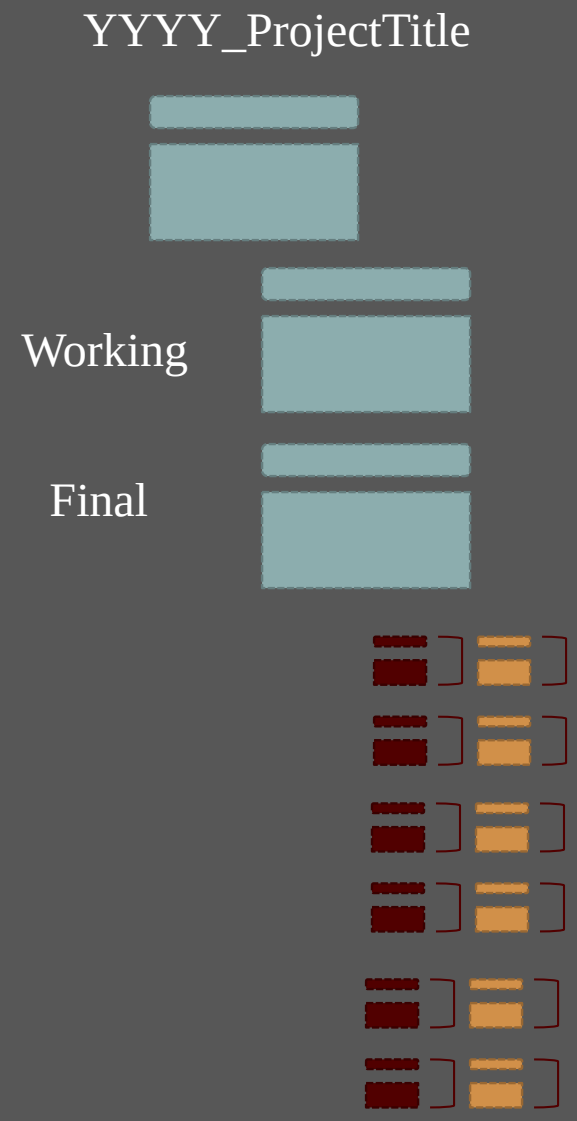


Knowledge Management

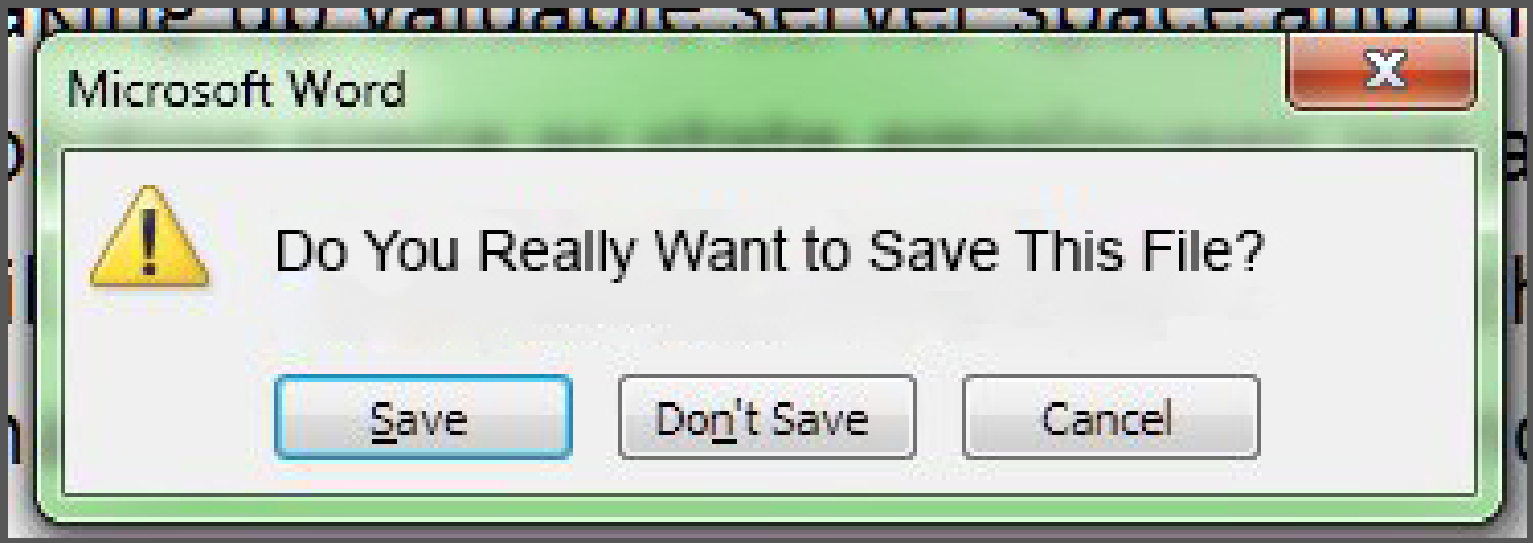
Directories

File Naming Conventions

Preferred File Formats (Access & Storage

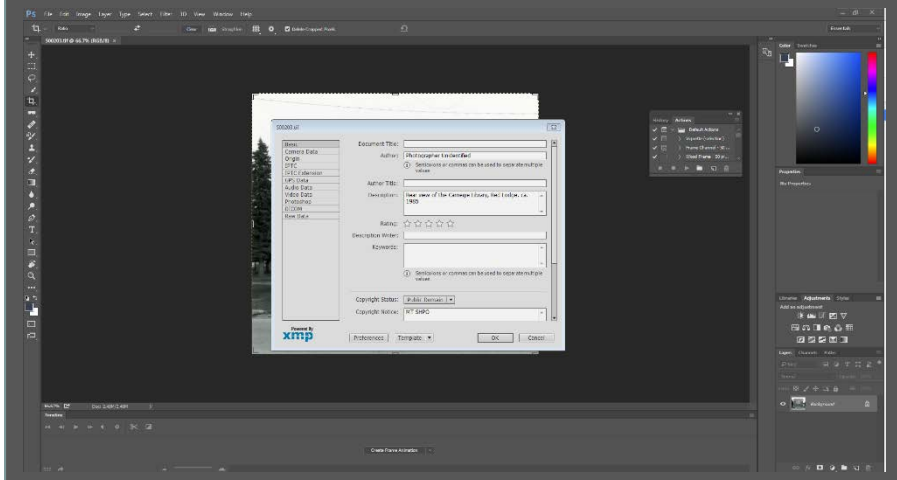


Curate Content

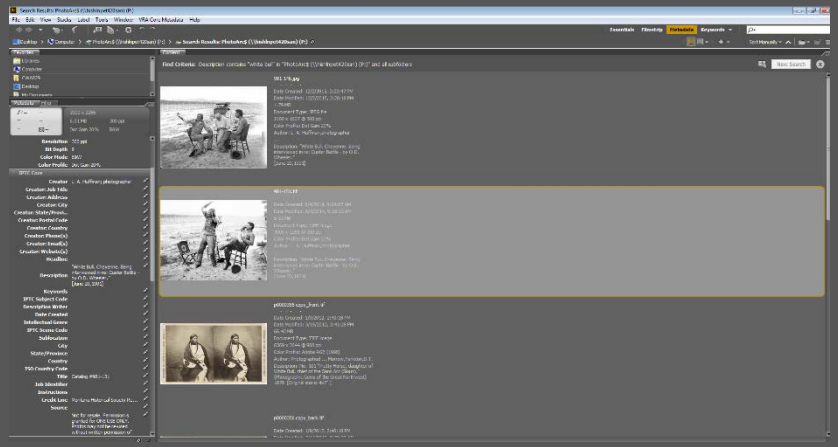


Storage & Management of Information

Adobe Photoshop

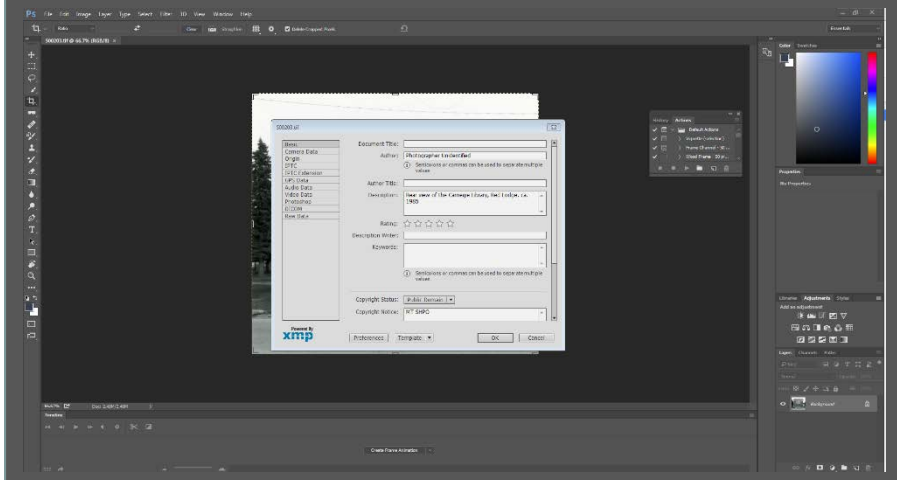


Adobe Bridge

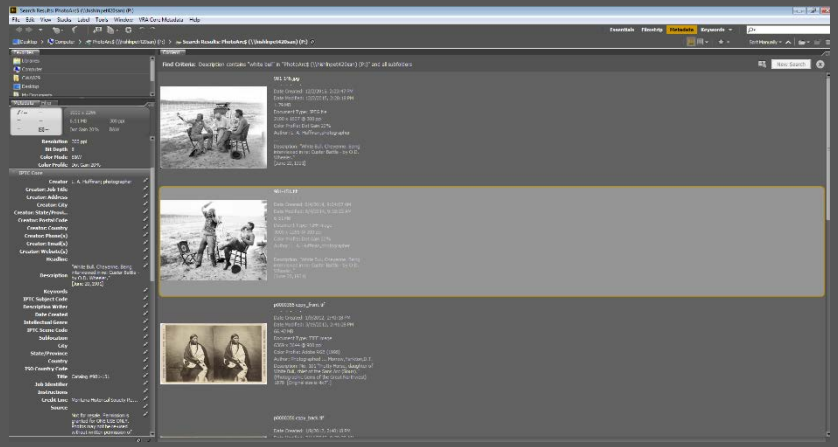


Storage & Management of Information

Adobe Photoshop

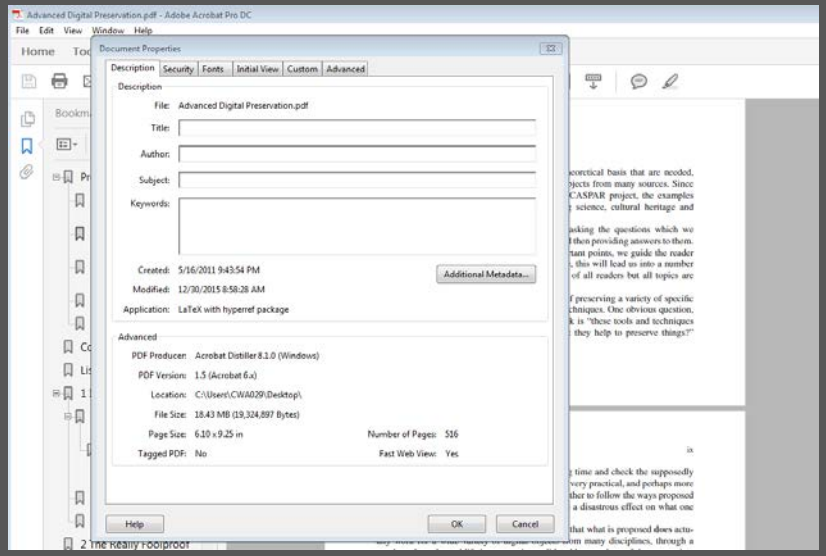


Adobe Bridge

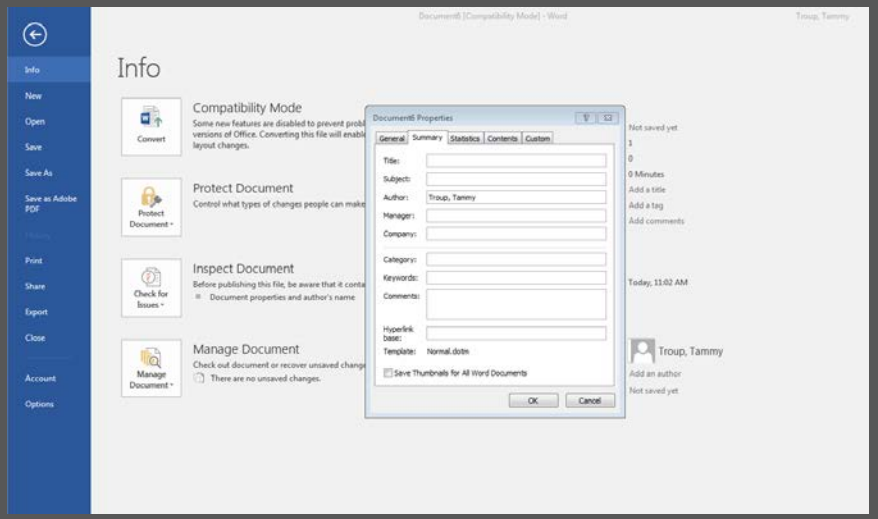


Storage & Management of Information

Adobe PDF

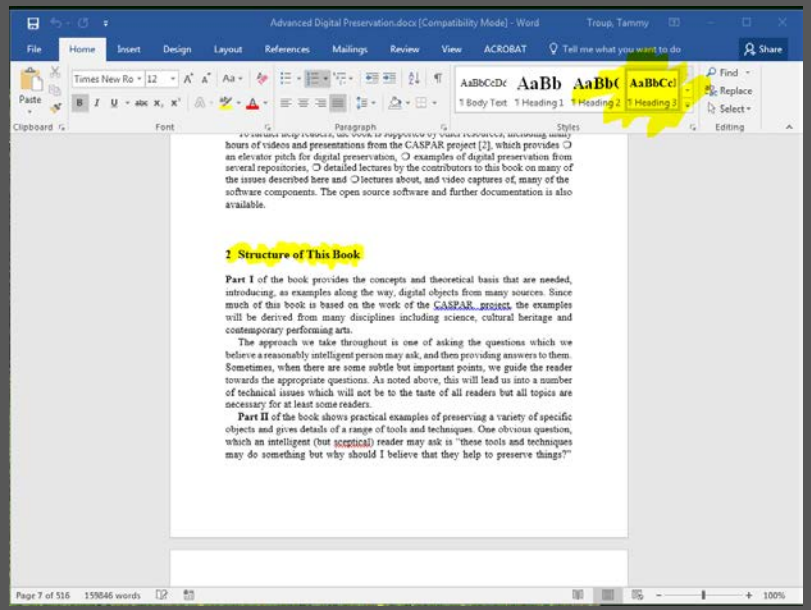


Microsoft Word

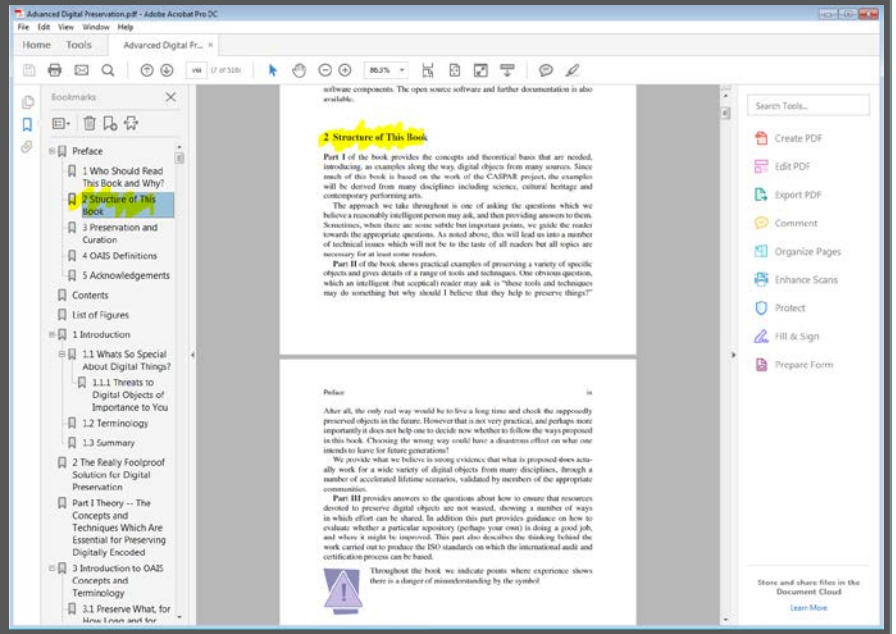


Storage & Management of Information

Word Structural



PDF Structural



Storage & Management of Information

Header

00000000	0000	0001	0004
00000010	0000	0000	0028
00000020	0000	0016	0010
00000030	6a69	0019	8888
00000040	5862	e8f7	8384

payload

XML declaration

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  <METS:FContent>
   <METS:xmlData>
    <oai_dc:dc xmlns:oai_dc="http://www.openarchives.org/OAI/2.0/oai_dc/"
     xmlns:dc="http://purl.org/dc/elements/1.1/">
     <dc:title>Music Folder</dc:title>
     <dc:creator>Chris</dc:creator>
     <dc:subject>music</dc:subject>
     <dc:description>This folder contains my music files.</dc:description>
    </oai_dc:dc>
   </METS:xmlData>
  </METS:FContent>
 </METS:file>
</METS:fileGrp>
```

XML CONTENT

Digital file to be preserved and XML sidecar

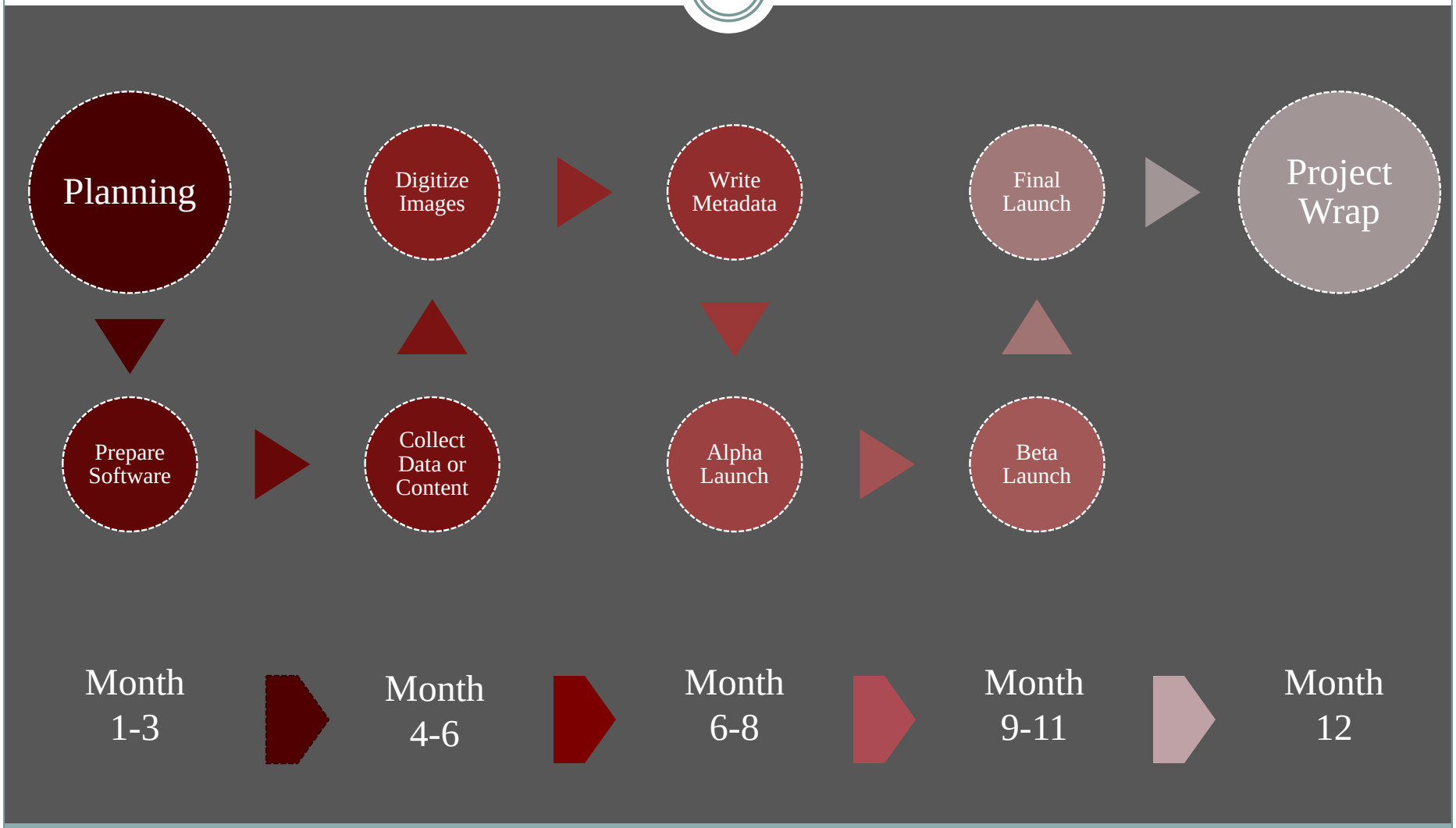
Storage & Management of Files

- Ensure Project Information is structured (e.g., Excel table or tagged text)

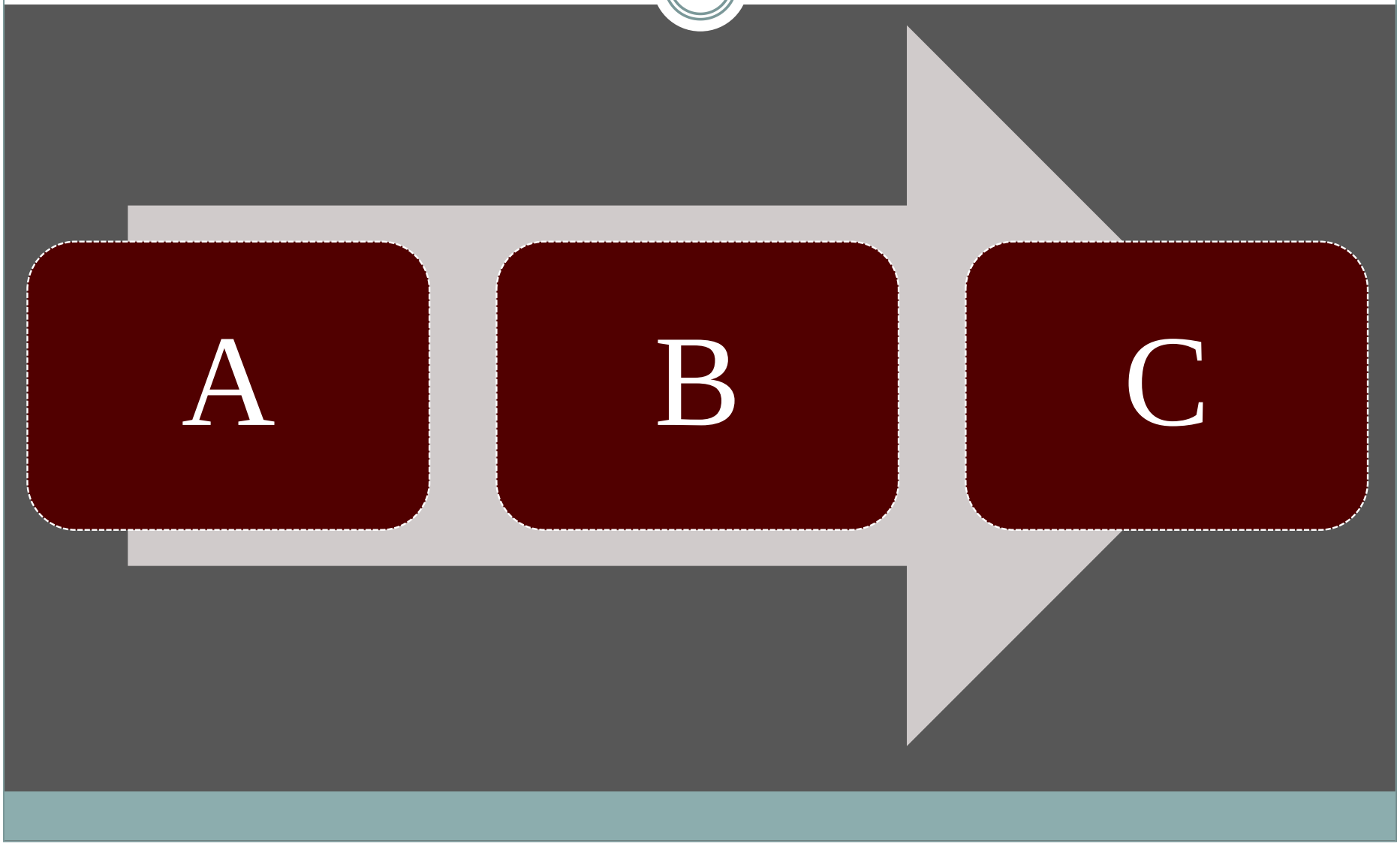
Title	Creator	Date	Description
ExploreBig	Montana Historical Society	2016-2019	ExploreBig is a mobile app built on the Curatescape platform to display information about and images of Montana's National Register sites.

<Title>ExploreBig</Title>
<Creator>Montana Historical Society</Creator>
<Date>2016-2019</Date>

Prepare Timeline & Workflow



Process + Process = Project



Juggling Kittens

Juggling Kittens excerpt from *The Jerk.* Directed by Carl Reiner, performances by Steve Martin, Bernadette Peters, M. Emmet Walsh, and Jackie Mason. 1979. Gif creator unknown. Retrieved 19 September 2016.

Planning lends focus to the processes…

Unidentified hunter looking through binoculars. No date. Unidentified photographer. Catalog #Pac 95-65 Box 44. Montana Historical Society Research Center Photograph Archives. Helena, Montana

Activities
&
Discussion

Activity

Activity 1

You're a staff member within a county government. You've been charged with creating an inventory of electronic records in preparation for active electronic records management. There is no budget, your resources are local (no off-site training is approved), and you've been given no deadline.

What type of project is this? What are the processes involved with this type of project? How will you communicate your needs to your coworkers? How will you structure your timeline?

Activity

Activity 2

You're interested in pursing a grant to provide digital access to historical county commissioner records.

Where will you begin researching and planning? What type of project will this be? What types of processes might be involved?

Activity

Activity 3

Your organization is the recipient of an archival intern for the Summer (15 weeks). The intern is interested in Digital Preservation and Electronic Records Management and has taken courses in pursuit of this area of interest.

What types of projects will provide the intern with a good learning experience while benefitting your organization? How will you coach and provide technique training to the intern?

Questions/Discussions

?