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Workflow at the UNLV University Libraries: A Digitization Program Grows Up

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Workflow at the UNLV University Libraries: A Digitization Program Grows Up

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CONTENTdm Western User Group
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Workflow defined

A **workflow** is a reliably repeatable pattern of activity enabled by a systematic organization of **resources**, defined **roles**, and **information** flows, into a **work process** that can be documented and learned.  

http://en.wikipedia.org/wiki/Workflow
Presentation Overview:

- Learning the importance of workflow (or...My First Year On the Job...)
- How we’ve approached workflow at UNLV, finding a path out of the mess!
- Questions for the future: centralized operations vs. relaxing control, quality vs. quantity, metadata?
Bad Workflow=Nightmares!

Based on true story!

- If you can’t find the materials, it is hard to do a project. (Resources)
- The third time is not a charm, staff who feel they are on a death march to finish a project are generally uncooperative. (Roles)
- Without a leader to translate between groups, collaborative projects fail. (Information)
- Experimentation can be a good thing, or a curse.
- Though there may be exceptions, the project should probably end in your lifetime!
Status: One year ago...

- 12 projects (?)
- Small-scale
- Not uniform in design, standards
- Spotty metadata
- No CONTENTdm expertise
- Lack of communication
- Stalled program
Status: Today

- Reorganization
- New program philosophy
- DAC-priorities
- Project Teams
- CONTENTdm/Project Manager
- Participatory decision-making
- 3 new campus collaborations
Process for Developing Digital Projects at UNLV Libraries

Proposal submitted

Proposal Reviewed and Accepted

Project Planning
- Identify creative and technical elements
- Define standards and best practices for the project
- Develop a timeline and list of milestones

Collect and convert materials
- Select materials: copyright, quality, content decisions
- Pilot project, research and testing of digitization procedures
- Quality control of surrogates: color correction, file formats, OCR review
- Choose controlled vocabularies and create data dictionary

Load records into CONTENTdm
- Normalize data for batch or manual upload
- Import data and administer records
- Metadata planning and research. Develop templates

Web site development and CONTENTdm customization
- Develop web site front end (if needed)
- Develop CONTENTdm custom template for the collection

Project review
- Usability testing, proofreading, web design review
- Obtain approvals from outside entities (if needed)

Move to production environment
- Promote, market, and register collection
- Submit to stakeholders for review process.
- Add to catalog

Project Launch
- Submit to stakeholders for review process.
- Add to catalog
- Update the main digital projects web site

Core Units
- Department or groups responsible for the work:
  - Digital Projects Librarian
  - Digital Advisory Committee
  - Project Team
  - Content Provider/Expert
  - Web and Digitization Services
  - Metadata Specialist
  - Systems
  - Library Management
  - External Relations

Associated Processes

Proposed Process:
- Form project team and set up communication structure
- Collect and convert materials
- Load records into CONTENTdm
- Web site development and CONTENTdm customization
- Project review
- Project Launch
Major roles:

Digitization Projects Librarian
  - Project manager, entire lifecycle of the project.
  - Possesses and develops expertise in the planning, creation, and administration of CONTENTdm collections

Digitization Advisory Committee
  - Select projects for production
  - Prioritize multiple projects
  - Evaluate collaborative opportunities

Project Teams
  - Conduct the work of the project (selection, scanning, metadata, loading records, web design)
Project Team (sample)

Project Team:
Digitization Projects Librarian
Digitization Technician/Indexer
  Graphics/Multimedia Designer
  Information Systems Specialist
Web Content/Metadata Manager
External Relations Specialist
Content Provider: Special Collections
Metadata Consultant: Special Collections
Cataloger
Collaborative workflow solutions

- One point person for projects
- Content guidelines
  - Serve many, not one
- Establishing standards
  - Digitization standards
  - Data import standards
  - Metadata standards
- Getting the technical pieces in place
  - Level of support, who, when?
  - Different systems/interoperability
  - Collaborative work space, IRs, and CONTENTdm
Resources, roles, and information

**Resources:** We can always use more staff time, most work is “borrowed”. (Web design, metadata, cool features, etc.)

**Roles:** More visibility for technology staff, moving out of “support role”. New dynamic roles and management structure. Flexibility is key.

**Information:** Project manager who takes responsibility for the project, CONTENTdm. Main communicator for project.

**WorkFLOW**…reduce obstructions (lack of training, unrealistic expectations, politics, inertia)!
Future challenges

- Priorities (faculty/teaching)
- Centralized vs. distributed control
- The metadata problem
- Adding social tools/features
- Working with partners
- Converting legacy projects
- Grants/managing multiple high priority projects
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