**v.2**

**Organizing Workflow**

**A Note from the Editor**

Welcome! This section of the workflow or handbook was created to help you navigate the New Mexico Digital Heritage (NMDH) Organizing workflow. It was created from a Mac computer, but you should be able to easily translate the directions for a PC. This workflow is meant to help you organize your items before and after digitizing them so you can keep a consistent process as well as detailed records. The digitizing process that we have covered in the Organizing Workflow is specific to the scanning a still image; the overall workflow will be limited to this process.

Together, we will go through the background of working with digital images, how to receive an item, and some final thoughts. On the final two pages is a basic **Item Intake Form** for you to fill out with your donor for each item.

Also, if you are working with an organization such as a library, please be sure to create a concrete and specific protocol that all staff, volunteers, and donors may follow.

Manitos is about digital resolana—a space for you to gather knowledge and stories and share them with the comfort of others. I too hope you find some relief after acquainting yourself with the organizational aspects of the New Mexico Digital Heritage through this workflow.

Warmly,

Adrienne Rosenberg

**Background Working with Digital Images**

**Resource**

The [Federal Agencies Digital Guidelines Initiative](http://www.digitizationguidelines.gov/guidelines/digitize-technical.html) (FADGI) provides [best-practice technical guidelines](http://www.digitizationguidelines.gov/guidelines/FADGI%20Federal%20%20Agencies%20Digital%20Guidelines%20Initiative-2016%20Final_rev1.pdf) for digitizing cultural heritage materials – mainly still images. The guidelines go into depth and are very technical. We will discuss basic information here.

**Staging for Reception of an Item**

Receiving the item, digitizing it, and then uploading the item to the NMDH website is only half the work. The first half is the initial staging and organizing for your institutional/personal needs, so you are able to safely keep and efficiently find and enter the item. The following list of questions will help you think about the design of your staging, but you are encouraged to develop a detailed process for your institution.

* Do you have a separate hard drive to place the digitized item files onto as either a temporary holding space or a permanent space? Is it large enough? Can it be dedicated only to the NMDH portion of your project?
* Have you decided how to organize your folders and files where you will place your digitized items after you scan them? Making clear locations will help in your institutional protocol with communication and formatting.
* Have you been developed a system of folder and file naming? This initial stage is the time to develop appropriate nomenclature for organizing your folders where you will be placing your digitized items. This is a very important step. Remember: There is a “Title” field in the metadata for an item that allows more space. You don’t have to name the file with its title but by developing a logical system will help locate the file.

**General Rules for Folder and File Naming**

Folder and file names should:

* Be unique.
* Be human readable.
* Be consistent.
* Be persistent.
* Be short- no more than 20 characters.
* Avoid punctuation and special characters.
* Use underscores instead of spaces.
* Use lowercase characters.

**Receiving an Item for the Archive**

**Receiving an Item**

When you receive an item, it is important to do a few things to guarantee you have all the information about the item as well as situate it appropriately within the New Mexico Digital Heritage website. Ask the donor to sit with you and help you fill out the **Item Intake Form(s)** for the item(s) you receive. Assume as little as possible about the item. This is an important step for community archiving and participation.

If, for example, a donor hands you a batch of photographs to digitize, decide if you think they are all relevant to upload. Which ones are the best photos? What are the differences? Remember, scanning can take 3-5 minutes and TIFF images take up space. If together you determine not all photographs are necessary for the needs of your site, ask the donor to sit with you and choose what ones they feel are most important for community archiving, Manitos, and your particular site(s).

Since the digitizing process can take time, ask if they need to collect their item(s) immediately or if it can be left with you. Notice if the item is fragile, enclosed in glass, in a plastic sleeve, etc. These protective measures may be what are holding the item together, so proceed with diligence and caution in digitizing. You never want to compromise the original item for the sake of digitization. For example, if a photograph is framed and in rounded glass, it may be better to take a picture of the photo in its frame, upload that photo as an item, and note within your item value fields the measures you took to capture the original and why.

If you do keep the item to digitize it, be sure to place it in a safe space along with its **Item Intake Form**.

**Is It Original?**

Next, determine whether the item is in its original format or whether it has been altered. For example, is the photo of the World War II veteran an original that was taken by the army? Or is the photo a copy that has been color enhanced and the words “United States Army” photoshopped recently onto it by the donor? Ideally, you want the original to digitize and archive into Omeka. However, if you do upload the altered photo, you will indicate this in the “Description” field in the Intake Form and **Creating an Item**.

**Filling Out an Item Intake Form**

See the final page for the intake form. Print and fill each of the fields out as much as possible. This is the information you need from the donor. Other fields not listed here are on the NMDH “Item” page. It is up to you to fill in these other fields since it is out of the scope of the donor’s inputs. Below is the explanation for all the fields.

Remember: Best practice is to fill out the form *with* the donor and the original item. Once it is scanned or the donor has left, it may be hard to determine the memories around the item and the physical details of the item.

This will be what you use for the Item creation in the **Omeka S Archiving Workflow**.

Note: Do no enter “?”, “NA”, “Unknown”, etc. in the field. Instead, leave it blank.

**Scan Name**

During the scanning step (see **Scanning Workflow**), this is the name that you give the file or is the name that is automatically entered by the Epson software for the digitized/scanned file. Documenting this will help you locate the file later to either rename it (“File Name”) or move it.

**File Name**

This is the name you will give the file when it has been organized into the hard drive. Think about how the file name will play into your institution’s organizing protocol.

**Title**

The title of the Item. If the Item’s creator gave it a title, enter that title. If not, you can create a brief descriptive title. You will have a chance to enter more information about the Item in the Description, so keep the title brief and think about the other Items you will be entering that are associated with it. This is part of your **Organizing Workflow**.

(For example, the title could be “Orlando Martinez, Lieutenant United States Army; World War II.”)

**Creator**

The name of the person who made the Item. This might be a person, several people, or an organization. If you don’t know, you can leave this field blank.

(For example, the photographer who took the Orlando Martinez, WWII Veteran. In this case it would be “The United States Army.”)

**Description**

Here is your chance to describe the Item in detail. You can tell the story behind the Item, if you know it. Why is the Item important? You can describe what is in the photograph, for example, as well as the history of it. Include words written on the back of the photo if there are any. The [Getty Art and Architecture Thesaurus](https://www.getty.edu/research/tools/vocabularies/aat/) can help with writing descriptions for photographs and artwork. Hitting return will add a paragraph break.

(For example, Orlando Martinez was in the United States Army from 1934-1948 and stationed in Germany. He was a lieutenant from Costilla, New Mexico and son of Armando and Lucita Martinez…..)

Remember: How does it relate to Manitos Community Memory project? Include words written on the back of the photo if there are any.

**Type**

The best practice for this field is to enter one of the following types: Text, Still Image, Moving Image, Sound, Physical Object, or Dataset.

(For example, “Still Image.”)

**Date Created**

The date the original Item was created, if you know it. For example, “05/10/1965.” If you only have a general idea of when the Item was created, or if it was created over time, you can enter an approximate period of time, like “1940-1945.” If you don’t know, leave the date field blank.

(For example, Orlando’s photo was taken in 1941. So, you would enter “1941”.)

If you wish to add more value fields, you can click on the “Text” box below the field box. You can also access and “Omeka Resources” and “URI”s to the format. However, these are extra abilities that are beyond the scope of this workflow.

**Date Modified**

The date the Item was changed; for example, a document that was worked on by more than one person might have a Date Modified as well as a Date Created.

If you wish to add more value fields, you can click on the “Text” box below the field box. You can also access and “Omeka Resources” and “URI”s to the format. However, these are extra abilities that are beyond the scope of this workflow.

**Rights**

The [Rights Statements Quick Reference](https://mndigital.org/files/rights/quick-ref.pdf) can help you select a rights statement for your Item. [RightsStatements.org](https://rightsstatements.org/page/1.0/?language=en) provides more information to help you choose a rights statement. If you are the creator or owner, you can consider using a [Creative Commons license](https://creativecommons.org/share-your-work/) depending on how you want others to use your Item. Strongly consider creating a consistent rights statement for your organization.

**Format**

The file format, physical medium, or dimensions of the Item. For example, the format of a drawing might be “Pen and ink, 3 x 5 inches.” The format of a sound or video file might be “40 minutes.” For a digital resource, the format might be “PDF,” “JPG,” or “PNG.”

If you wish to add more value fields, you can click on the “Text” box below the field box. You can also access and “Omeka Resources” and “URI”s to the format. However, these are extra abilities that are beyond the scope of this workflow.

(For example, Orlando’s photograph would be “3x5.”)

**Language**

The language that the item is in. If the item is in English, please state English rather than leaving this blank. However, if the item does not contain any text, leave this field blank.

**Publisher**

The organization or person that published the item.

**Coverage**

In this example, this field indicates geographical locations related to the Item. It is best to use the [Getty Thesaurus of Geographic Names](https://www.getty.edu/research/tools/vocabularies/tgn/index.html) to find the standard format for a place name, if possible.

(For example, enter “Germany.”)

**Contributor**

This could be an editor or translator, for a book or journal; for a photograph, it might be the photographer’s studio. This field is sometimes used to indicate the person who donated the Item to a museum or archive.

(For example, Orlando’s great grandson named Pablo Martinez brought the photograph to Manitos to be archived. So, it would be “Pablo Martinez.”)

**Final Thoughts**

**Where will the Item Go on the Website?**

Next you, as the Manitos ambassador, will begin to think about where to place the item on the NMDH website by asking a few basic questions. The **Omeka S Archiving Workflow** will explain how to upload, create metadata, and place the item onto the NMDH site.

* What is this item (photo, object, document, etc.)?
* What is the item’s relevance to the project? To your community?
* On which site (that you have access to and permissions within) does this item belong? Do you need to make a new site for this item? If so, will you have enough content (now or in the future) to make the site relevant or should you use an existing site?
* On which page (that you have access to and permissions within) does this item belong? Do you need to make a new page for this item? If so, will you have enough content (now or in the future) to make the page relevant or should you use an existing page?
* Does this item belong in an item set? Do you need to make a new item set for this item? If so, will you have enough items (now or in the future) to make the item set relevant or should you use an existing item set? Or none at all?

**Scan Name: \_\_\_\_\_\_\_\_\_\_\_\_**

**File Name: \_\_\_\_\_\_\_\_\_\_\_\_**

**ITEM INTAKE FORM**

**Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Creator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date Created: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date Modified: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Rights: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Format: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Language: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Publisher: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Coverage: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Contributor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Notes:**