



THINKING ABOUT DIGITISATION?
COMMUNITY ARCHIVES EVENT, NATIONAL RECORDS OF SCOTLAND
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Planning and documenting

During the planning stage think about the things mentioned below. In particular, consider:

- why are you digitising in the first place and what do you mean by 'digitisation'?
- who are your audiences (whether digitisation is to give access to others online or offline)? What do they want?
- will you be infringing any ownership rights regarding the original material, the copyright in anything written in them or appearing on the originals or anything created by volunteers?

Start keeping a written record of why you make decisions about things and how to do key processes (a technical manual).

Bear in mind that if someone deposits records or lends them for copying, they may belong to someone else and you might infringe copyright or legal ownership. For example, records of local bodies like roads trustees and civil parish authorities (which belong with the successor local authority) and the records of civil, criminal and church courts (which are *extra commercium* and the property of the court or church concerned and covered by deposit agreements of those bodies with NRS or other archives).

Digital Imaging

Consider the stages and issues of the digitisation process.

Formats and standards

What image formats will you need for archival storage and public access, what image quality and resolutions will be appropriate, what are the implications in choosing image formats and standards for storage and online access?

- There is a useful image storage calculator on the TownsWebArchiving website:
<https://www.townswebarchiving.com/storage-data-calculator>

Preparation

Things like numbering of documents and pagination, which will assist with quality control

Quality control

How will you ensure quality and completeness in the imaging process, whether the imaging is done internally or externally?

File naming

Will your image names mimic the references for the original material, or will the image names be different and controlled by something like a digital object database? Avoid image-linking issues arising from spaces and special characters in file names. Use unique names for each image file.

Metadata

What metadata do you need to support the images? Which of these will you need to assemble:

- catalogue data?
- index data?
- transcriptions?
- captions for online exhibition?

If you have data capture carried out by a commercial company or by volunteers, how will you quality control what they've done?

Avoid using special characters and abbreviations as much as possible in metadata. If your metadata is uploaded to a website or supplied to a website host, keep a master copy (and possibly back-up copies in other formats).

Be very careful when cutting and pasting metadata, such as catalogue data or transcripts, from one format to another (such as from a word processing format to a catalogue system or website content management system); the data may contain hidden formatting and coding that makes it misbehave within the destination system and/or in an online environment.

Online development

When considering website design (whether you do it yourself or have it done by a commercial developer or host institution) take a serious interest in the design.

Components of an online resource

As well as supplying metadata and images, you will, in many cases, need to supply 'business rules' for how the online service should operate (such as whether an online search device should search only certain fields in the data in a certain way). Describe these precisely in a specification for your website developer.

Accessibility and Usability

Accessibility is the measure of whether your service can be used by anyone with a disability. Usability is the term for how easy it is to use a website (such as how many times someone has to click or scroll on pages or fill in information). Don't confuse the two terms. Get to know the Web Content Accessibility Guidelines (WCAG). These might be a legal requirement, depending on your funder or if a project supporter is a public body, but even if it isn't, you should consider accessibility as a positive thing that increases your audience.

- Equality Act 2010 guidance - <https://www.gov.uk/guidance/equality-act-2010-guidance>
- WCAG guidance - <http://www.w3.org/WAI/standards-guidelines/wcag/>

Online development, continued

Adaptability

There is an almost infinite variety of Internet browsers, devices, operating systems and printing set-ups and technological change is very rapid. Make sure your design is adaptable to different devices, operating systems and browsers. When creating exhibitions and news pages, don't become fixated with layout.

Statistics and measurement

Get to know what measurements and related terms mean (website visits, unique visitors, transactional measures, search engine robots, log-file analysis, cookies and search engine optimisation). Which of the ways of measuring online activity do you want to be the measures of success?

Content management systems v DIY development

if you need to update and add to your online resource, are the limitations of content management systems (CMS) a reasonable trade-off against the frustrations and workload of trying to do the development yourself? Learn rudimentary HTML, so that you can spot sloppy coding and diagnose why content isn't working online.

Domain names

Be aware of the risks of not renewing domain name registration promptly (especially if the domain name registration and payment mechanism is not in your control but is in the hands of a website host or partner's IT or Finance department).

Remedial work

How will you correct and update your images and metadata (master copies and online versions)?

How will you respond to complaints from users that:

- the site isn't functioning properly?
- a caption, transcript, catalogue entry or index entry is wrong?
- an image on the website is corrupted?

Remedial work involves a process of diagnosing what the problem is, responding to the complainant and rectifying the problem. It can involve technical procedures, such as using a content management system, uploading data and files via a file transfer service, and using in-house systems or proprietary software. This is where a technical manual for all processes is essential.

Re-use and copy supply

What use and re-use rights do you (or your funders or project partners) want your material to have?

How will you respond to:

- a request from a broadcaster, publisher or exhibitor for a high quality image and permission to re-use an image?
- a complaint or legal action from someone who alleges breach of copyright?
- a request from someone to re-use an image on social media (do you know which social media platforms' terms and conditions involve you giving away rights to any material you upload)?

Consider having a copyright statement and a take-down policy on your website and ensure you have the technical ability (directly or via a hosting service) to remove or un-publish something quickly.

Useful reading:

- Tim Padfield, *Copyright for Archivists* (5th edition, 2015).
- The copyright guidance on The National Archives website includes guidance on copyright relating to archives in general - <http://nationalarchives.gov.uk/legal/copyright/>

Migration and re-design

At some point you should expect to have to do some or all of the following:

- migrate your images and data to new storage
- transfer your online images, data, content to a new website provider and explain your business rules/design specification to a new developer
- test your online service (or aspects of it) in response to some technical change