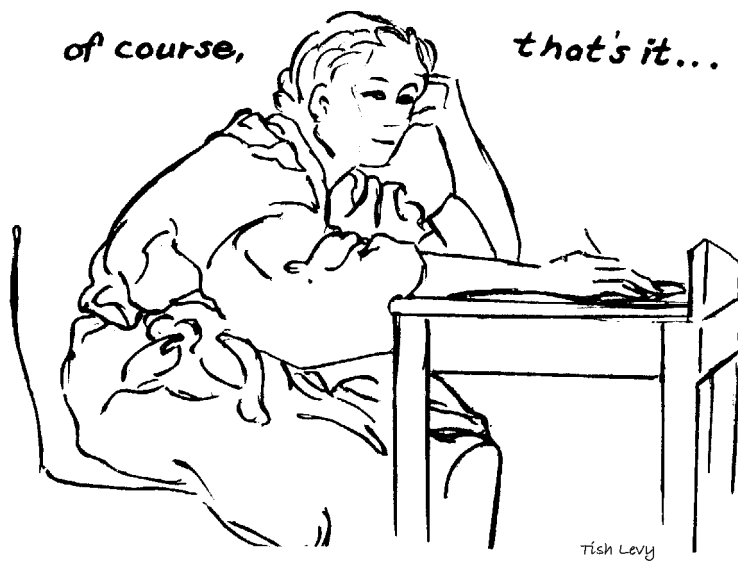


# Managing a Digitization Project



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## Introduction

As you have been discovering, a digitization project is not just a scanning project. As I wrote in November 1996 for InformationWeek, a digitization project includes the “ basic processes - creation, storage, management ... interlocking pieces each of whose configuration impacts the requirements of the others.” For a successful sustainable project, you need to plan each piece: its goals, mission, standards and procedures.

Welcome to a step-by-step manual for managing a digitization project. I am organizing it as if it were part of an old fashion correspondence course.

This Serial (course) will be organized by the phases of a digitization project: planning, implementing and using. Each section will then deal with the three major components, as referenced above, of a digitization project at that phase. To update the terms think of creation as digitization, storage as access (over a network, web etc), and management as including retrieval.

Thus, Section I – Planning your Digital Collection - will not only discuss the importance of planning but how to establish goals and standards for your digitization, access and management components and how the standards for the different components influence each other. This section will also include a list of sources for technical standards and benchmarks that others have already developed.

Section II – Implementing the Plan - will cover critical path design, task descriptions, quality control, and possible workflow strategies for merging the three components.

Section III – Using the Collection - will concentrate on the management and access components and evaluating the success of your project. It will include methods for publishing, promoting and evaluating your digital collection.

Each chapter is designed as a lesson, including work exercises based on a fictitious project – The Postcard Collection, which will be described more fully within. You may, of course, also substitute your own project when doing the exercises.

This manual is being electronically published in serial format, a chapter at a time, as an Acrobat file. At the completion of the publication process, you will have a complete manual that addresses the major issues that one might expect when implementing a digitization project, from setting selection criteria to establishing an effective workflow to project evaluation or just those parts that you wish to have. The different chapters will be available at [www.DIG-mar.com](http://www.DIG-mar.com) for a small fee

To take further advantage of the electronic format, you may submit your exercises for feedback if you desire. Send them and any comments to [DIGman@DIG-mar.com](mailto:DIGman@DIG-mar.com).

*Images are information. Here is help in managing them.*

### *Section I – Planning your Digital Collection*

#### Part I Importance of defining and setting your goals

##### Making Your Road Map

*Know your destination before you start.*

The key to managing a project is to have a good project plan or road map. Such a plan helps you make decisions more effectively as the project progresses. It also helps you get back on track if you have a detour. As with any road map, you need to know your destination before you can map your way to it; therefore, the best place to start a plan is at the end—the project goal. What is the purpose of this project?

For those of you who have a project in mind, take a few minutes to write down a simple goal statement.

In our fictitious project, the project manager Kalie Scope works for a Historical Society that has received a collection of 100 postcards from a patron. This collection is composed of pictorial and holiday postcards that the patron's grandmother received in 1907 from around the USA. Her supervisor has decided it is an ideal project to begin the digitizing project. After reviewing this collection to decide what digitizing it could offer her other patrons, Kalie came up with the following goal statement.

*This project will provide an insight into the manner of communications at the turn of the Century.*

Starting from this broad goal, we will now lay out the map of how to get there. First, we must be sure we know if we are going to Washington, Iowa or the state of Washington. In other words, we must define our goal in terms that are more specific. For example in order to provide an “insight into the manner of communications”, we will need to define “insight” and “manner of communications”. Do we mean the images used on postcards or the messages handwritten on them? Do we care about the postmark dates? If postcards are