GUIDING PRINCIPLES

Standard digital projects will be represented with a web presence and a search portal on a Rutgers University Libraries website. Routine digital projects will conform to the Libraries’ standards for digital files and metadata, use the standard search portal and templated web layout, be stored in RUcore, and open for public use. This process will enable libraries to take ownership of their projects and build local expertise.

GETTING STARTED

The following steps take place when a project is initiated.

Local Library initiates contact

The library director or their designee will contact the director of Shared User Services (SUS) about a proposed digital project.

Gather Information

The director of SUS will gather information from the library director/designee that will provide input into a discussion of whether the digital project is feasible and can be supported. Typically, the following items factor into an evaluation:

- purpose of the project
- intended use of the resources
- benefit and value of the resources or the collection
- timeline or deadline for completion of the project
- size of the project
- number of resources (e.g., images, documents)
- current format and condition of the resources if they are not digitized
  - available staff or funding to digitize the resources
  - requirements (if any) for software, additional hardware, and long-term digital storage
  - what steps are necessary to digitize the content
- digital format of the resources if they are digitized
- descriptions of the resources
  - how the descriptions are organized (e.g., spreadsheet)
  - description quality and completeness (title, date, names, subject keywords, notes)
  - existing metadata records for the resources
  - metadata scheme (e.g., MARC, Dublin Core)
  - available staff or funding to create or transfer metadata
- date or date range for the resources
- rights documentation for the resources, e.g., copyright transfer
- collection sponsor (tentative)
  - availability for the duration of the project
- ballpark cost and resources estimate
Infrastructure Review

Digital projects require considerable resources on the part of the library, even when the local library contributes staff or funding. The Libraries’ central units will determine, in consultation with the VPIS/UL, if the digital project can proceed. In addition to technical requirements and resource availability, consideration is given to the project’s benefit to the university/campus and its alignment with library and campus priorities.

Designation as a routine digital project

If the digital project can proceed as a routine digital project, the director of SUS will designate a project manager (PM) and inform the library director. The library director will confirm the appointment of the collection sponsor (a librarian or permanent staff member). The PM and collection sponsor will jointly prepare a work plan and time table for the project and share it with the library director and the director of SUS, who in turn will distribute it to the heads of all the central library units.

Not a routine digital project

If it is determined that the digital project does not conform to the parameters of a routine digital project, or that there are insufficient resources to complete the project, the director of SUS will contact the library director with the decision. The path forward for such projects will be handled on a case by case basis.

ROLES: LOCAL AND CENTRAL

Collection Sponsor

The library director will appoint a collection owner from among the librarians or permanent staff. This person is responsible to ensure the completion of many of the tasks described in this process and in the work plan for the project.

With the PM:
- prepare a work plan and time table for the project

With the metadata librarian:
- determine the official name of the project and communicate it to the web team
- identify and provide sufficient resources and staffing to digitize objects
- supply the names and Rutgers NetIDs of personnel who will be adding metadata or uploading digital files in the WMS
- enter metadata or oversee local staff who will enter metadata based on standards established by the metadata librarian
- upload and generate digital files in the Workflow Management System (WMS)

With the web and portal team:
- provide the “About” information for the project’s web page, and related links (if applicable) for the project’s web page
Digital Projects: Process Details

- select one or more images for the web page
- review drafts of the web page
- review the standard search portal design and provide timely feedback

Project Manager (PM)

The director of SUS will appoint a PM who is familiar with and conversant in the minimum and standard digitization, metadata, and rights statements requirements. The PM will monitor the entire process and ensure that it proceeds through completion and establish communications channels among all the participants. The PM will meet regularly, and sometimes frequently, with the collection sponsor and others involved in the project. The PM will notify the web and portal team, the digital data curator, the metadata librarian, and the public relations specialist about the project as soon as it is approved. The PM will notify the libraries user services specialist when the collection is created and at least one resource is ingested so that the search portal can be created.

With the collection sponsor:
- prepare a work plan and time table for the project

With the digital data curator:
- determine the project’s file formats
- ensure that the project receives a digital curation review to itemize and secure the software, hardware, storage space, and other resources necessary for the creation, transfer, and long-term sustainability of digital files
- coordinate with Integrated Information Systems (IIS) if additional storage and processing is needed
- communicate the location of the digital files (local or server) to the metadata librarian

With the web and portal team:
- declare that the project is established, the web page and portal have been reviewed and tested, and the site can Go Live

Metadata Librarian:
- create a metadata application profile
- establish a collection in the WMS
- set up a metadata template for the collection
- set standards and processes for quality control
- make a recommendation for inclusion in QuickSearch (item or collection level, and holdings)

With the digital data curator:
- confirm the project’s file formats and the location of digital files (local or server)

With the collection sponsor:
- determine the official name of the project and communicate it to the web and portal team
- confirm the standard metadata that will be provided for the project
- select the appropriate rights statement from rightsstatements.org
• establish user accounts in the WMS for the collection sponsor or local staff who will enter metadata and upload/generate digital files
• provide training in the WMS for the collection sponsor or local staff
• review metadata and send instructions to make corrections

With the PM:
• report progress regularly, including the first resource ingest and the final ingest of all resources

Digital Data Curator

With the PM:
• determine the project’s file formats
• ensure that the project receives a digital curation review to itemize and secure the software, hardware, storage space, and other resources necessary for the creation, transfer, and long-term sustainability of digital files
• coordinate with Integrated Information Systems (IIS) if additional storage and processing is needed
• communicate the location of the digital files (local or server) to the metadata librarian

With the metadata librarian:
• notify the metadata librarian of the project’s file formats and the location of digital files (local or server)

Web and Communications

• create the web page for a digital project
• incorporate the search portal into the project’s web page
• publicize the availability of the digitized resources after consulting with the collection sponsor (and perhaps the metadata librarian and PM)

Other positions that are involved in digital projects are: the library director, the head of SUS, the head of Technical Services, the web services librarian, and the library user services specialist.

PUBLIC PRESENTATION

Templated Web Presence

The top level Digital Collections web page organizes panels for each project and links to each project's templated landing page. That page will typically include two or three images, an “About” description of the project, a search portal to the contents, and optionally additional links such as contact information or related links. The web team, with input from the project manager and the collection sponsor, will create the index’s panels and provide a 1-2 sentence description based on the project’s About information.

A working list of past, current, and potential digital projects, exhibitions, and other content, is available at https://rutgersconnect-my.sharepoint.com/:x:/g/personal/rmarker_libraries_rutgers_edu/Efknk8YYsBFgAPFBqoq1B3FlfOaoTIWoiH-vpr2lxq?e=t4Hlhi
Standard Search Portal

A digital project search portal will include search options or limiters for appropriate mandatory metadata elements as described in the Guidelines for Completing the Descriptive Metadata Template:

- full text of text objects/full record of non-text objects (default)
- title
- date
- name (if appropriate)
- language (if this is a significant feature of the project)
- type of resource (search limiter, if there are multiple resource types in the project)

Additional search options can be added if the element is already indexed and available for use in the partner portal tool. In many cases, the project’s web landing page will have a single search box and only the Advanced Search function, or “Edit My Search/New Search”, will display the full search options.

If the project includes multiple collections, they can be listed and selected for search, using the default display option to show the collections.

If necessary for the functioning of the portal, the Help text for the search portal can be customized, but the content of the customization must be provided by the collection sponsor and will be reviewed by the PM.

The search portal can include a single browse list of element terms that are used in the project. This browse list is fixed at the time of the creation of the search portal and will not be updated to accommodate additions to the digital project. The PM can advise on the inclusion and best use of a browse list. Most digital project search portals will not have a browse list.

The libraries user services specialist will establish the search portal and send the portal key to the web team for inclusion on the project’s web landing page.

TECHNICAL STANDARDS

Digital Files

Documents and images, computer generated files, audio resources, and video resources must conform to recommended minimum file formats, resolution, and encoding standards. They also must be accessible in alternate formats for use by persons with disabilities. These requirements are charted in the Digital File Format Standards Rubric. The digital data curator will advise and consult with the collection sponsor on best practices and workflow for the creation and transfer of digital files.

It may be necessary to make requests for, and secure, additional storage space or other resources for some digital projects. The digital data curator will work with the participants and IIS to fully understand the scope and size of the resulting digital collection, including what software, hardware, storage space, and other resources will be required to undertake the project.

Metadata
The Guidelines for Completing the Descriptive Metadata Template represent the minimum standard requirements for describing a digital object. Digital projects can include additional optional elements if the element is already established in the WMS.

The collection sponsor is responsible for providing the official name of the project or collection (e.g., The Badian Roman Coins Collection, Krueger Scott African American Oral History Collection, Stedman Gallery Collection) and the names and Rutgers NetIDs of personnel who will be adding metadata and uploading files in the WMS to the metadata librarian.

Rights Statements

A resource will have a rights statement as defined in the Rights Statements Guidelines for Routine Digital Projects. These statements “communicate the copyright and re-use status of digital objects to the public” (https://rightsstatements.org/page/1.0/?language=en). The collection sponsor, working with the metadata librarian, will determine the rights status of each collection or resource and choose from among the recommended rights statements in the Guidelines. The rights statement will be incorporated into the metadata template in the WMS by the metadata librarian, as described in the Metadata Librarian role.