

# Project Planning



## Project Process

Center for Digital Research and Scholarship

Our services for journals, monographs, and conferences can involve complex technical development and design support. For these projects, the CDRS team undertakes careful research and planning. Our process commonly involves seven steps:

### **Step 1: Researching Your Needs**

This is your opportunity to describe everything you need and what you are looking to accomplish by working with us. We will likely respond with a lot of questions about your requirements—you might not even know the answers to some of them. This isn't a bad thing!

#### *Milestones:*

- Questionnaire
- Scoping

### **Step 2: Proposing Solutions**

Based on the ideas and answers you give us during Step 1, we will come up with solutions. We'll craft a document that describes the overall plan we've devised, and submit it to you. You're encouraged to give us feedback.

#### *Milestones:*

- Proposal, Letter of Intent, or Master Service Agreement

### **Step 3: Planning Next Steps**

This is the time we spend to work out details. We'll work with you to determine the full scope of the project and identify "soft spots" that could cause issues.

#### *Milestones:*

- Technical foundation
- Editorial needs
- Usability review
- Licensing/rights/permissions definition
- Project plan

### **Step 4: Defining Elements**

Now, we turn details into definitions. We work to complete visual layouts, wireframes, and other representations of the end result of the project. We spec out the functionality and work with you on what content is needed and the rights management of that content.

#### *Milestones:*

- Application definition/Information Architecture (IA)/User Experience (UX)
- Graphical prototyping
- Content gathering/creation

- Rights contracts acquired

**Step 5: Building Products**

From visual layouts and functional specifications, we start to build your solution, using the results of past steps as a framework and your content as the foundation. During this phase, your product will be built in a private online environment to which only you and our team will have access.

*Milestones:*

- Application build
- Graphical build
- Content entry
- Web friendliness

**Step 6: Evaluating Results**

Once the build is complete, we'll do a thorough check of all the components to ensure we've assembled the elements correctly and followed best practices in doing so. We will ask for your participation in checking things over!

*Milestones:*

- Functional testing
- Search engine optimization (SEO) rank testing
- Accessibility check

**Step 7: Launch**

After evaluation, we'll take your product live at a predetermined URL, and work with you to announce your launch.

*Milestones:*

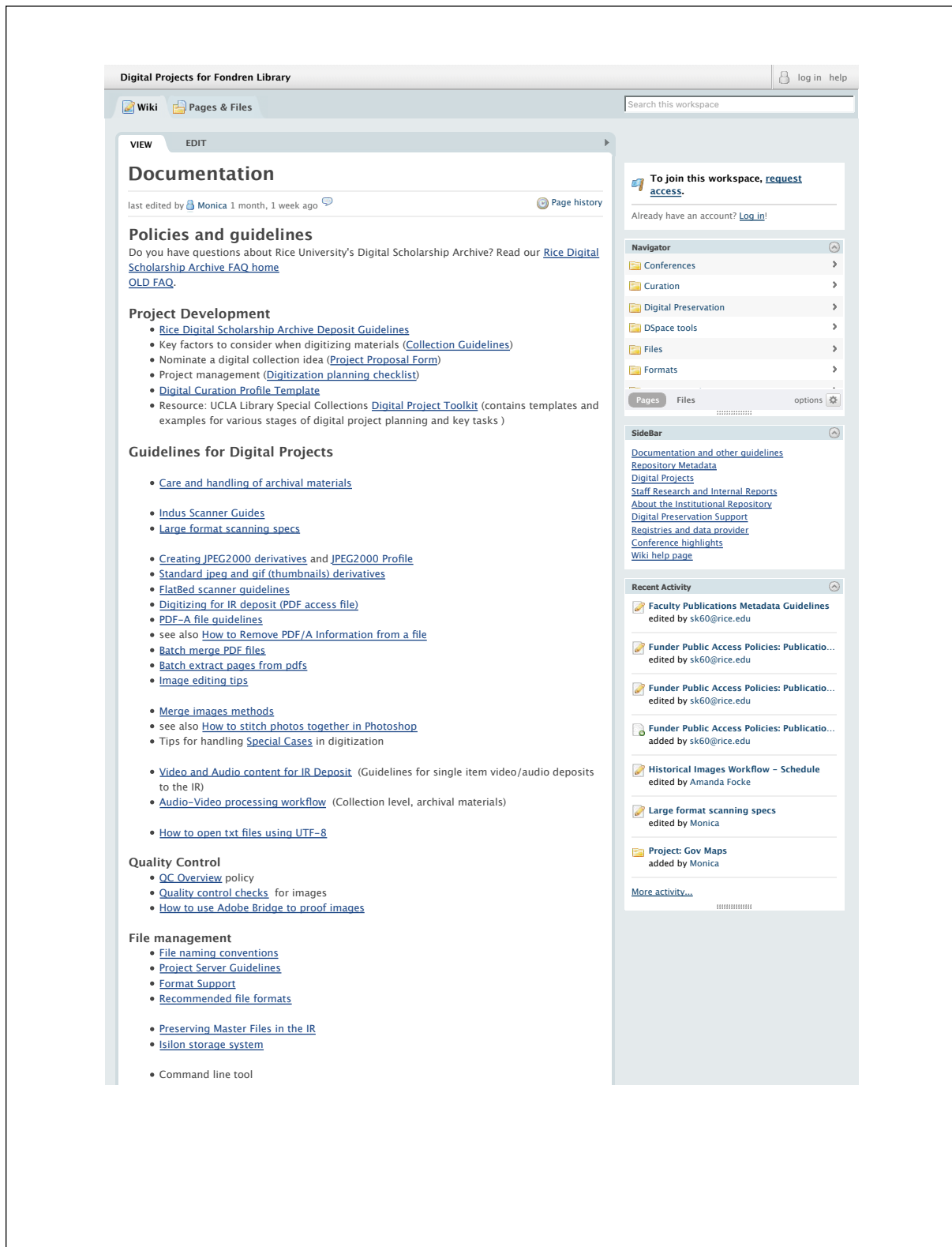
- Production recheck
- SEO submission
- Accessibility recheck

October 15, 2014  
Prepared by Nancy Lemay

Library Questionnaire to help Researcher with DH Project

1. What is the name of the project?
2. Does someone working on the project have technical skills?
3. Any other collaborators involved in the project (institutions or individuals)?
4. Is this a grant-funded project? If so, for how long is the project currently funded?
5. What type of assistance are they seeking for this project?
6. Ask them to describe conceptually the project's final product:
7. What will it include?
  - a. A database
  - b. A website
  - c. An online exhibit
  - d. An application to be used by external users
  - e. Online data visualizations
  - f. Maps
  - g. Online timeline displays
  - h. Audio/visual storytelling
  - i. Collection - types of objects?
  - j. Community space for users (including discussion space)
  - k. Other

8. Who is the audience of the final product? Describe the users of the final product.
9. If applicable, how do they foresee the site being used?
10. What type(s) of data/content does the project have? (Describe and list any file formats).
11. Is the content/dataset complete or in progress?
12. Is the content copyrighted? If yes, do they have copyright clearance or permission to reproduce the content?
13. Does the content have descriptions? What types of fields do the object descriptions include? What type of metadata will the content have - if any?
14. Will the site be open to the public or restricted to a certain user group? If restricted, who will the site be restricted to?
15. How large is the data/content (i.e. GB or TB)? (You may need to calculate this for them)
16. What type of tools/applications have they investigated so far (if any)?
17. Is there a particular tool or application that will be essential to this project?
18. How would they define the "completion" of the project completion (consider this project in phases and describe the "completion" of the current project phase)
19. What is the expected date for the project to be in a completed state (i.e. in production as a website)?



o [Extract filenames and file sizes](#)  
o [Steps to batch rename files](#)  
o [Steps to batch move files](#)  
o [Terminal commands \(MAC\)](#)  
o [Robocopy \(Robust File Copy\)](#)  
o [Calculate directory size](#)

- [Exiftool](#) commands and [tips](#) for extracting technical metadata
- [Command line resources](#)
- [FITS \(command line tool\)](#)
- [BagIt \(command line tool\)](#)

**Intellectual property management**

- [Digital copyright workflow](#)
- [IR Deposit License](#)
- [Fondren Library Consent to Publish in the IR form](#) (typically used for archival materials)

**Metadata**

- [Repository Metadata](#)
- Guidelines for [Embedded Image Metadata](#) (including tools for batch importing metadata to image files)
- Transition to [FAST subjects](#) (new project)
- [Type Guidelines](#)

**Ingest guidelines**

- Overview: [IR content input methods](#)
- [Deposit Checklist](#)
- [Batch ingest steps](#)

- [IR Withdrawal Policy](#)


**Tips and tools**

- how to harvest metadata from repository using [OAI-PMH](#)
- transferring large files (eg tiff images to TEI Vendor) -- FTP | Rice DropBox Service <https://dropbox.rice.edu/>

**Others**


- page: [Visual resources and tools](#)
- [Steps for annotating images](#)
- [Cross over services](#)

Comments (1)

 **Monica** said  
at 10:01 am on Mar 26, 2015

tiny url for this page: <http://bit.ly/u5m0RB>

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The screenshot shows the website for the Center for Digital Humanities at the University of South Carolina. The header includes the university logo and navigation links for CALENDAR, MAP, DIRECTORY, GIVE, and GATEWAYS. The main navigation menu on the left lists: Center for Digital Humanities, About (highlighted), Advisory Board, Affiliated Faculty, Alumni, Contact, History, Job Postings, Mission, Social Media, and Our Location. Below this are sections for Events, Our Projects (Future Knowledge Archive, Digital Brown Bag Archive, Courses and Workshops), Resources, Our People, and Early History of DH at USC. The main content area features a large abstract digital art image and an 'About' section. The 'About' section explains that Digital Humanities is an interdisciplinary field defined by its object of study or methodology, involving new methods and the transformation of cultural heritage records in the Information Age. To the right of the main text is a 'Contact Information' box with details on location (Thomas Cooper Library, Room 513), hours (Mon-Fri, 9 a.m. - 5 p.m.), contact (803-777-0544, knox@email.sc.edu), social media, and mailing address (1322 Green Street, Columbia, SC 29208). The footer contains the Center for Digital Humanities logo, icons for Location, Contact, Give, and Calendar, and social media links for Facebook, Twitter, and YouTube.



## Digital Collection / Project Request Form

Form Submitted By:

Date:

Email:

### About the collection / project

1. What is the title of your collection / project?	
2. Who is the project lead? (include email)	
3. Please list any other departments, institutions or individuals involved in the project (include emails).  Consider who advocates or “champions” for this collection at U of T and beyond and any potential consortial or collaboration partners.	
4. What U of T department holds primary responsibility for this collection / project?	
5. Which of the following statements best describes how this project is currently managed?  5a. This project is primarily managed by an individual or group whose chief role is to make key decisions about this project on a full-time basis (eg, a full-time project manager for the project).  5b. This project is primarily managed by an individual or group who also oversees several other similar digital projects (eg, a director at a digital humanities centre or library).  5c. This project is primarily managed by an individual or group who primarily has other academic responsibilities (eg, a librarian or professor who also runs a digital project).	

UNIVERSITY OF TORONTO

Digital Collection/Project Request Form

<https://docs.google.com/document/d/1SSni5Xk8E7zOGwjnsSOasLsnWXZBapjzR-xZSHlyGQ/edit>

5d. This project does not require ongoing management (eg, deposited in a repository with no updates).	
5e. Other management structure (please describe).	
6. Describe your project.	
7. Describe the specific type of items included in your project. For example: <ul style="list-style-type: none"><li>• database</li><li>• monographs</li><li>• journals</li><li>• scores</li><li>• maps</li><li>• manuscripts</li><li>• photographs</li></ul> <b>Estimate the # of each item type.</b>	
8. Briefly describe how this collection is unique to the University of Toronto.	
9. Is this collection / project available online elsewhere? If so, indicate where (include URL). 9a. If yes, where is it hosted? (leave blank if not applicable) 9b. If yes, when did this website go online?	
10. What is(are) the ultimate goal(s) of making the collection / project available online?	
11. What types of research questions will the collection / project answer?	
12. If one of your goals is to re-design / re-implement your existing project, what is the motivation behind this re-design?  12a. What improvement do you expect from the re-design / re-implementation?  (leave blank if not applicable)	

13. Describe the functionality that you want to achieve in your final project. Consider what users will <b>do</b> with the collection / project.	
14. Who will be the legacy contact person for the project once the project is completed?	

**About the collection / project data**

15. What type(s) of data does the project have? For example: <ul style="list-style-type: none"><li>• .tif files</li><li>• .jpeg files</li><li>• .xml files</li></ul> <p><b>Please list all file formats. If possible, please submit a sample of your data.</b></p>	
16. Is the content / dataset complete or in progress?  16a. If the content / data is in progress, please provide a date of when it is expected to be complete and who will be completing the data compilation?	
17. Does the content have metadata / descriptions?  17a. If yes, what metadata standard is in use (i.e. MARC, MODS, Dublin Core)  17b. List the fields being used for metadata / description (i.e. Title, Date, etc.).	
18. How large is your content? (i.e. calculate the expected final size of your project's content / dataset in GB or TB).	

**Access to collection / project**

<p>19. Will the site be open to the public or restricted to a certain user group?</p> <p>19a. If restricted, who will the site be restricted to?</p>	
<p>20. Are there copyright or privacy concerns associated with access to the collection / project?</p>	
<p>21. Do you have copyright clearance or permission to reproduce the collection / project online? If yes, please explain.</p> <p>If you have permission from an institution external to UTL to reproduce the collection, please include a contact.</p>	
<p>22. Who do you see as the main audiences for this project?</p> <p>Check all that apply:</p> <ul style="list-style-type: none"> <li>• Researchers or other scholars</li> <li>• Post-secondary instructors</li> <li>• Primary or secondary instructors</li> <li>• Students Specialist</li> <li>• Amateurs or subject enthusiasts</li> <li>• General public</li> <li>• Other (please describe)</li> </ul>	
<p>23. Do you want the collection / project to be indexed by Google?</p>	
<p>24. Do you want the collection / project to be discoverable through other repositories? Please list (i.e. WorldCat, Archives Canada, etc.).</p>	

**Funding and maintenance for collection / project**

<p>25. What were the sources of funding for the creation of this project?</p> <p>Check all that apply.</p>	
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Digital Collection/Project Request Form

<https://docs.google.com/document/d/1SSni5Xk8E7zOGwjnsSOasLsnWXZBapjzkR-xZSHlyGQ/edit>

<ul style="list-style-type: none"><li>• Grants Base budget from your home institution</li><li>• Earned income (eg, via sponsorship, advertising, subscriptions, etc.)</li><li>• Donations or individual philanthropy</li><li>• In kind (staff time)</li><li>• Other funding sources (please describe)</li><li>• Not applicable</li></ul>	
<p>26. What types of in-kind support is U of T providing for this project?</p> <p>Check all that apply.</p> <ul style="list-style-type: none"><li>• Project management</li><li>• Content selection</li><li>• Content production (eg, scanning, metadata creation)</li><li>• Information technology or support services (eg, server space, tech support, website development)</li><li>• Preservation Marketing and outreach</li><li>• Legal services</li><li>• Financial and accounting services</li><li>• Indirect costs (eg, office space, supplies)</li><li>• Other (please describe)</li><li>• Not applicable</li></ul>	
<p>27. What activities will your project lead or project team undertake for the ongoing maintenance or development of this project?</p> <p>Check all that apply.</p> <ul style="list-style-type: none"><li>• Project management</li><li>• Content selection</li><li>• Content production (eg, scanning, metadata creation)</li><li>• Information technology or support services (eg, server space, tech support, website development)</li><li>• Preservation</li><li>• Marketing and outreach</li><li>• Legal services</li><li>• Financial and accounting services</li></ul>	

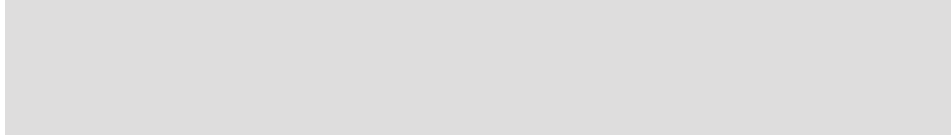
<ul style="list-style-type: none"> <li>• Other (please describe)</li> <li>• Not applicable</li> </ul>	
<p>28. Is there an annual budget dedicated specifically to the ongoing maintenance or development of this project?</p> <p>28a. If yes, please indicate the approximate amount).</p>	
<p>29. How many total staff, in full-time equivalents, will be involved with the ongoing maintenance or development of this project?</p>	
<p>30. Which of the following statements best describes the goal for the ongoing work associated with this project?</p> <ul style="list-style-type: none"> <li>• This project will reach a completion point; all ongoing activities after that point will be dedicated to preserving the resource and providing basic access to it.</li> <li>• This project will continue to grow; ongoing activities will expand its content, tools, functionality, and user base, etc in addition to preserving the project.</li> <li>• Other (please describe)</li> </ul>	
<p>31. How would you define the "completion" of the project?</p> <p>Consider this project in phases and describe the "completion" of the current project phase.</p>	
<p>32. What is the expected date for the project to be in a completed state (i.e. in production for people to access)?</p>	
<p>33. Is this collection / project intended for long term preservation?</p>	
<p>34. Does the collection / project have a long term preservation plan?</p>	

34a. If yes, please describe.	
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**Assistance Needed for the Collection / Project**

split into two - one initial overview of needs and then separate follow up with who will do what

35.	Expectations for UTL ITS contribution to collection / project	Expectations for project lead or team contribution to collection / project
Project management		
Scanning or digitizing content		
Determining best fit for metadata / description of content		
Creating metadata / descriptions for content		
Investigating and securing rights for content		
Making materials accessible via UTL ITS services (i.e. ingestion into TSpace, Collections U of T, Exhibits U of T, etc.)		
Training to use UTL ITS services (i.e. ingestion into TSpace, Collections U of T, Exhibits U of T, etc.)		
Promoting the collection / project		
Creation of a specialized interface for the collection / project		
Applying for funding for the project		



## Planning

### Planning a Digital Project

Digital projects provide increased accessibility, assist with teaching and research, can serve as a means of preservation, and help to highlight Washington University's unique collections.

Long-term accessibility of digital projects requires initial planning and development of digital files as well as maintenance of digital files that may accumulate over time and need continued attention.

Scholarly Publishing is happy to assist in the planning of your project. There are many steps involved in creating a digital project; therefore it is necessary to plan the full project before jumping in. Some things to think about include: scope of the project; value of digitization; format, size, and condition of the materials to be digitized; intellectual property or copyright; metadata; funding; storage and preservation; access; the project timeline; and evaluation strategies. Before beginning a digital project, all of these things should be considered and planned for, to allow for the successful completion of the project.

**Contact** Scholarly Publishing about planning your digital project and please use the **Project Planning Form** to think about and gather as much information as possible.

#### 1. Scope of the project

How large is the project (number of items or files, length of video, etc.) ?  
Are the materials already organized and described in some manner?

#### 2. Value

How does this project support the missions of the University?  
How will faculty and students benefit from this project?  
How does this project complement other projects?  
What is the value of the content? How rare or unique are the materials?  
What is the benefit of providing digital access?  
What is the enduring value of a digital version of the project?

#### 3. Description of physical features and condition of source materials

What impact will digitization processes likely have on the condition of the materials to be digitized?  
Does a copy exist elsewhere in either a physical or digital format?  
Is the item brittle? Torn? Faded? Fragile?  
Is the material in an obsolete or near obsolete format?

#### 4. Intellectual property considerations

Who owns the physical materials?  
Who owns the intellectual property rights for the material?  
Is the material in the public domain?  
Does the project fall within fair use guidelines?

#### 5. Metadata

What administrative, technical, and descriptive metadata has been selected?  
How will the metadata creation be achieved?  
Will the chosen schema work with existing schemas in use on campus?

#### 6. Funding

What existing University resources are needed to complete this project?  
What new equipment must be purchased to complete this project?  
What new personnel must be hired to complete this project?  
How will the costs of digitization and post-digitization processing be supported?  
What aspects of the digitization work can be out-sourced? Is out-sourcing appropriate?  
What other departments or institutions could be partners in this project?  
What grant funds are available to complete this project?

#### 7. Storage and Preservation Plan

How many and what kind of derivative files will be made from the master files?  
What are the file size estimates for the master file and all derivatives?  
What temporary and permanent storage needs does this project have?  
What additional content will be added at a later date?



**8. Access Plan**

What restrictions, if any, will there be to use this digital collection?  
How will users locate this digital collection?  
How will users navigate within this collection? Will there be links to other collections?

**9. Projected Timeline**

What is the timeline, including lead-time for project preparation?  
What other timelines – e.g., grant funding cycles – should be considered?  
What is the project completion date? Milestones and / or deliverables?  
How will the timeline be managed?

**10. Evaluation**

How will the success of the project be evaluated?

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Digital Gateway | Open Scholarship | WUSTL | Sitemap

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The screenshot shows the York University Libraries website. At the top, there is the York University logo and navigation links for 'FUTURE STUDENTS', 'CURRENT STUDENTS', and 'ALUMNI & FRIENDS'. A search bar is present with the text 'Search yorku.ca'. Below this is a red banner with 'York University Libraries' and a secondary navigation menu with links like 'Libraries Home', 'Collections', 'Research & Learn', 'Ask & Services', 'Library Branches', and 'About Us'. The main content area features a search bar with 'Find Books, Journals...' and a 'Find' button. Below the search bar, there are tabs for 'Library Resources', 'eResources', 'Research Guides', and 'Course Reserves'. The page title is 'Digital Projects Inquiries'. The main text describes the Digital Initiatives Advisory Group (DIAG) and provides information on how to submit requests. A numbered list outlines the process: 1. DIAG receives the form and acknowledges receipt. 2. In most cases, a consultation is scheduled with appropriate members of DIAG to learn more about the project and its context. 3. The project is then brought to the DIAG for discussion and recommendations. The group will determine the extent to which the Libraries can propose to be involved, with an eye to offering additional advice or suggestions to help the project along. 4. The Chair follows up with the submitter to communicate DIAG recommendations. A note mentions the 'YUL digitization policy' and a link to access the form. On the right side, there are social media icons, a language dropdown set to 'English', a 'SEARCH LIBRARIES' WEBSITE' section with a search bar, and buttons for 'Libraries' Hours' and 'My Library Account'. Below that is an 'UPCOMING WORKSHOPS' section with a link to a 'Career Centre: Organizing Your Post-Grad Application workshop (at Scott Library)' dated 'Apr 8' and a 'View all Workshops' link. At the bottom right, there is a 'FEATURED' section with a photo of a research fair and the text 'Undergraduate Research Fair winners Announced!'.