

# Novice to Know-How Module Text

## Course 4: Select and Transfer Digital Content

# Module 3: Working with Internal Content Creators.

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## 1. Introduction.

In the previous module we looked at the issues to consider when working with external depositors. We will now move on to consider what we need to do when working with creators of digital content from within our own organizations.

In theory we should be able to assert more influence on content created internally, but in reality, this can be hard to do! Over the next few slides, we will be looking the issues and steps we can take to try and ensure digital content comes to us ready for preservation.

## 2. What Issues Do We Need to Consider?

It is generally agreed that the earlier in the lifecycle of digital content that we can embed preservation considerations, the easier and cheaper digital preservation will be. Therefore, with internal content creators, we want to establish guidance and good practice for content creation and management wherever possible. The following sections will highlight key issues.

## 3. File Formats, Naming and Organization.

There are a number of key issues relating to files to cover with internal content creators. These include what file formats to use, how to name files, and how to organize them. Depending on your organization and the influence you are able to exert, this may be issued as "guidance" or "requirements".

The aim here is to encourage the creation of content that is "preservation ready", i.e. that is in file formats we have confidence we can preserve, files named in a way that will not cause problems when being processed (e.g. special characters in names can cause errors with some software), and organized in a logical way that allows us to easily retrieve the content to be preserved.

With file formats we may rely again on a "preferred file formats list" as described in the "File Formats and Digital Preservation" module. There is also a useful "Topical Note" on these issues available on the DPC website. A link is included in the resources for this course.

## 4. Sensitive Data/Privacy.

As with external depositors, it is essential we consult with internal records creators to ascertain if the digital content contains any sensitive data or information covered by privacy laws.

Having a mechanism that allows content creators to easily flag this can be advantageous and create efficiencies. We may also wish to create special workflows for processing this content, that take into consideration the sensitivity of the information contained within, as well as instituting access restrictions.

## 5. Metadata and Documentation.

Capturing sufficient metadata and documentation to enable preservation is essential, but this needs to be balanced with realistic expectations! When working with internal content creators we need to consider how much metadata we can ask for/require them to create. Consider what the minimum requirement is to facilitate preservation. Collaborating with content creators to create high-level metadata may be helpful. High-level metadata requirements and how to capture it are examined in the module "Creating a Digital Asset Register".

When carrying out outreach activities with colleagues, incorporate an explanation of the importance of metadata and documentation in preserving and providing access to digital content. There is a useful "Topical Note" available on the DPC website explaining preservation metadata to non-specialist users. A link is included in the resources for this course.

## 6. Transfer Processes.

Establishing well-tested, well-documented, and efficient processes for transferring digital content to the archive/repository for preservation is a key goal when working with internal content creators. To do this, it can be useful to start with a survey of what content is being created. This will help you plan what processes are needed and when, as well as informing your retention schedule and helping to plan for digital preservation activities more broadly.

A worthwhile next step is establishing a pilot project with a friendly department to develop and test potential transfer processes. Including input from content creators to ensure they are fit for purpose and will, hopefully, also encourage buy-in. This will likely be an iterative process. You will need to consider:

- When transfer should take place
- How much content you may receive
- What formats it will be in
- What metadata and documentation will be included
- What software/tools you may use to aid the process
- How integrity checking can be included in the process

## 7. Retention Schedules.

Having robust, accessible retention schedules is as important, and perhaps even more so, in the digital world as it is in the analogue one. With early intervention in the lifecycle of digital content offering clear advantages in relation to long-term preservation, knowing what content will need to be preserved, and for how long, even before it is created is the ideal.

Retention schedules can, therefore, be an excellent tool for planning and executing digital preservation, offering clarity on what needs to be done and when. This becomes even more important if the "active" life of the digital content will be several years. In this case we may need preservation interventions before transfer to the repository. The number of years before this becomes a concern will depend on the file format.

## 8. We Need to be Visible!

One of the most important things we can do to help facilitate digital preservation in our organization is to be more visible! This can include:

- Holding information sessions and focus groups on digital preservation, highlighting how it can help with key business processes and organizational aims and allowing the capture of stakeholder needs.
- Attending relevant management meetings to represent the digital preservation requirements of your organization.
- Sitting on the board of projects that will produce important digital content (e.g. research or digitization projects) to insure it is included in the planning of outputs.
- Offering training on digital preservation processes so staff members are aware of good practice.

This advocacy and awareness raising work will be an ongoing process. We may need to repeat the messages many times!

## 9. In Summary...

The most important thing when working with internal content creators is making sure you work to raise awareness of digital preservation throughout the organization. Making sure you have the right conversations, at the right time. You should be well prepared whether it is a meeting, focus group, or training.

Important issues to address include:

- What files are being created
- What metadata is needed
- If there are any concerns about sensitive or private data
- How content will be transferred
- What content needs to be retained and for how long.