



Special Collections Patron-driven Digitization

From customization to standardization

Moira Fitzgerald, Trip Kirkpatrick, Anu Paul
Yale University Library

Centralized Service



Implemented a pilot service for Divinity, Music, Arts, and MSSA in Preservation & Conservation Services. Includes:

- Standard intake process
- Standard terms of service
- Standard digital outputs
- Consistent data collection
- Consistent user experience for the patrons & staff
- Shared documentation & communication templates
- Centralized LibGuide



Who is doing it?

Kathy Bohlman, Arts Library

Jennifer Coggins, Beinecke Rare Books & Manuscript Library

Mark Custer, Beinecke Rare Books & Manuscript Library

Moira Fitzgerald, Beinecke Rare Books & Manuscript Library

Trip Kirkpatrick, Library IT

Robert Klingenberg, Preservation & Conservation Services

Jonathan Manton, Music Library

Anu Paul, Preservation & Conservation Services

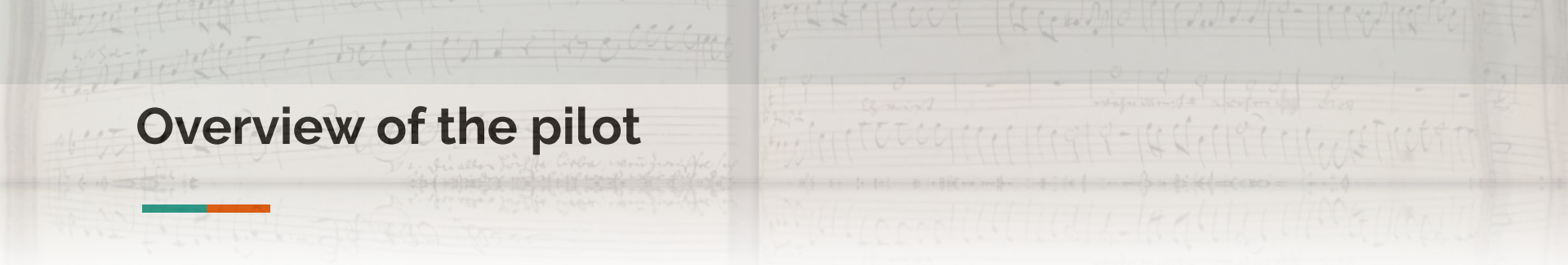
Steve Ross, Beinecke Rare Books & Manuscript Library

Frontline Services staff

Preservation Services staff

Kevin Glick (former staff)

Overview of the pilot



Repository Staff

- Assessment of digitization orders
- Item retrieval from LSF
- Description updates (if needed for digitization)
- Submission of requests and items to Preservation

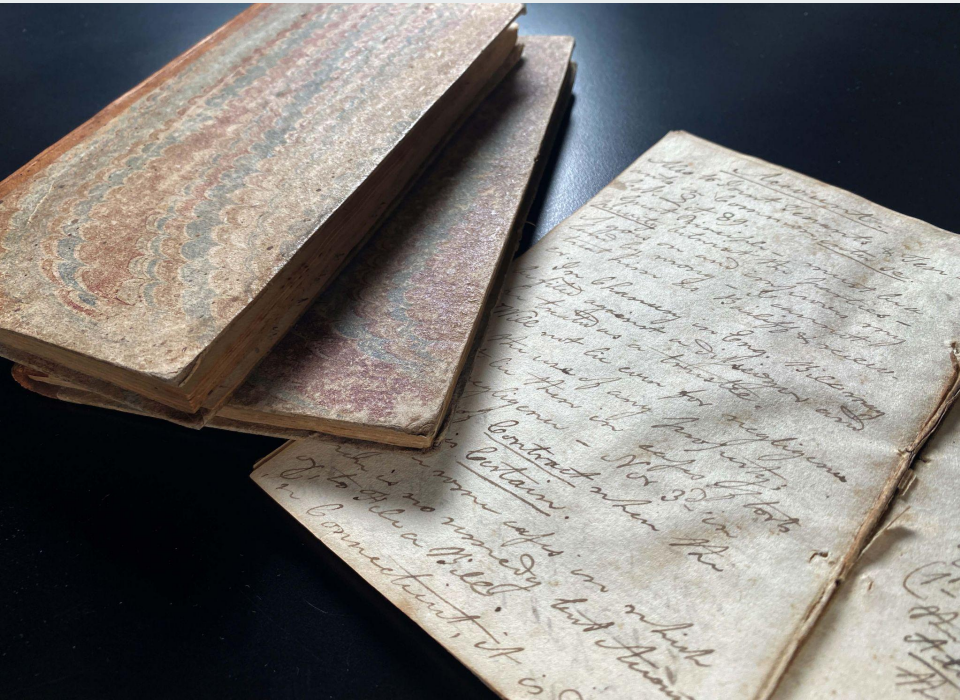
Preservation & Conservation Services

- Condition assessment
- Digitization, image processing, quality control (QC) of the requested material
- File delivery to repository
- Item return to LSF or repository

Repository Staff

- File delivery to patron
- Preservice ingest
- Description updates (if items rehoused after condition assessment)

Ordering process: Frontline services



- Frontline staff are responsible for order intake
 - Identifying materials
 - Assessing digitization request
 - Item retrieval from on- or off-site
 - Description updates (if needed for digitization)
 - Submission of requests and items to Preservation

Ordering process: Frontline services



- All orders are initiated in Aeon
 - Patrons must register and agree to user terms, including copyright disclaimer.
 - Patrons request [using this documentation](#)
- Prefer using data imported from system of record over standalone form
 - Standardized data
 - More accurate information

Yale University Library Special Collections

[Main Menu](#)[Search for Materials](#)[Order History](#)[Digital Copies](#)[Activities](#)[My Profile](#)[Logoff](#)

Dean Gooderham Acheson papers

Correspondence re publication

Transaction Number **287589**

Call Number **MS 1087; HM 258**

Box/Volume **Box 57**

Added July 29, 2022 1:48 PM

[View a detailed description of this item](#)

[REQUEST DIGITAL COPY](#)

New Book/Publication Request

Type in a few letters or words in the Call Number, Title, or Author field to search. If your text matches an ORBIS record, you will be able to select it and populate the form.

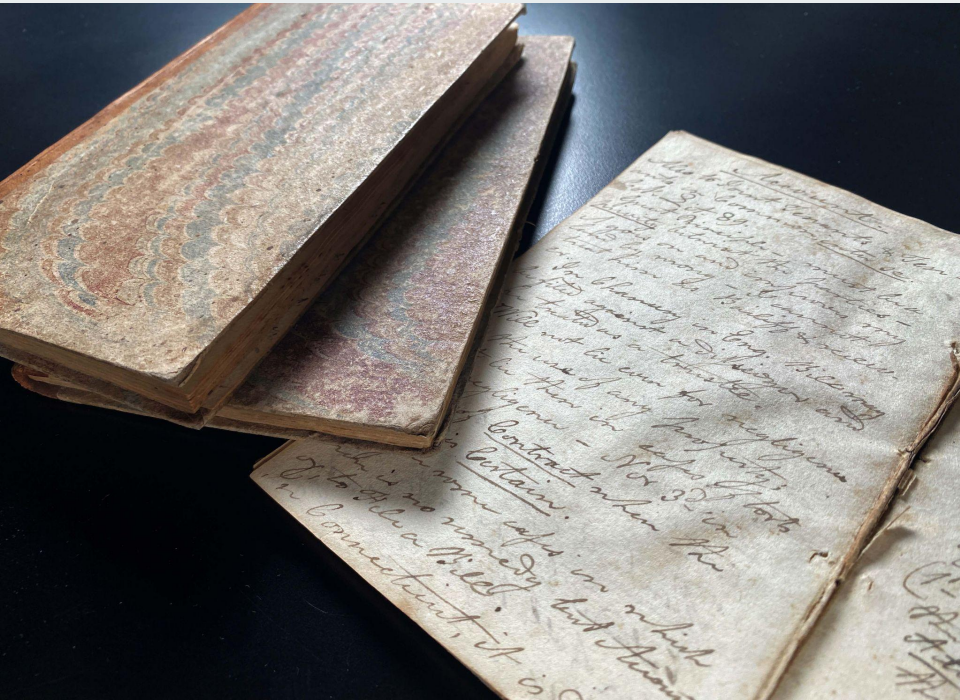
Item Information

Call Number/Accession Number/Identifier (required)

Volume/Year

[SWITCH TO DIGITAL COPY REQUEST](#)

Ordering process: Frontline services



- Standardized “print digitization” slip among repositories,
- Standardized email templates,
 - Confirmation of order receipt
 - Item available
 - To return the box for reading room use
- Queues
 - Awaiting Order Processing
 - Order in Process
 - Order Finished
- Fields
 - Have not yet used custom fields (but plan to)
 - Using fields intended for photoduplication and have co-opted other fields.

Transaction Status (tracks movement of the original item)	Order Status (tracks the progress of the digitization order)	Workflow steps
New Photoduplication Requests	Awaiting Order Processing	Order verification by Repo staff
In transit to DRMS	Order in process	<p>Order confirmed by Repo staff.</p> <p>Item Awaiting to be delivered to Preservation Services via LCS</p>
Arrived in DRMS	Order in process	<p>Item Checked in by Preservation services Staff in Aeon & in Airtable.</p> <p>Collection items are reviewed by the Conservator (Preservation Services Staff), including page counts if possible.</p> <p>Item is transferred to DRMS for digitization</p>

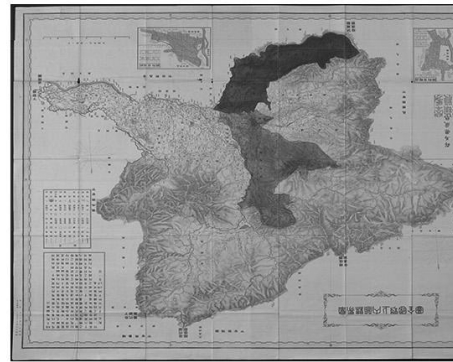
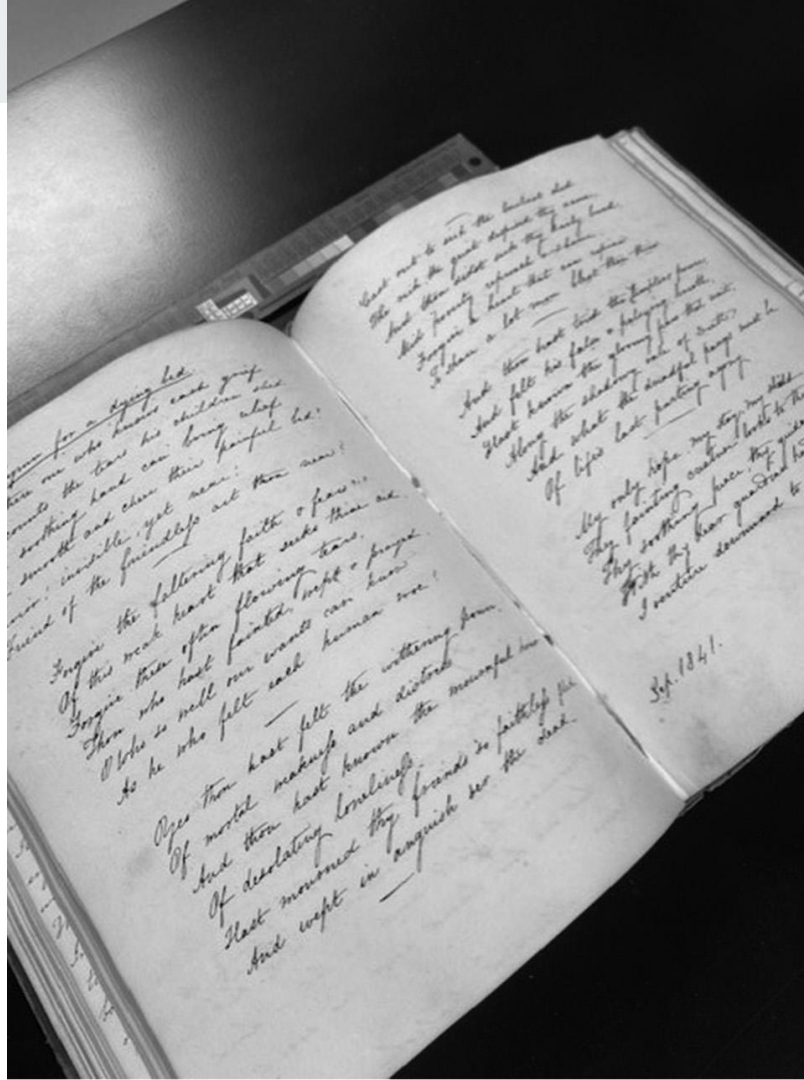
Transaction Status (tracks movement of the original item)	Order Status (tracks the progress of the digitization order)	Workflow steps
Arrived in DRMS	Order in process	<p>Item Checked in by DRMS staff in Airtable.</p> <p>DRMS staff follows the digitization steps listed in the Workflow document.</p> <p>When the file passes QC the workflow step changes to “QC Complete/ Awaiting file delivery”</p> <p>DRMS staff uploads pdf & tiff files to the repository share / sends notification to Public Services Staff & the workflow step changes to “Request complete/ Drop off items to Preservation.”</p>
Arrived in DRMS	Order in process	DRMS staff returns the item(s) to Preservation Service
Arrived in DRMS	Order finished	Files are delivered to patron by owning repo
Request Finished		Items are returned to LSF or home repository by Preservation Services staff

Fields used



Aeon field name	Used for	Patron or Staff supplied
PageCount	Number of images	Staff
ItemPage	Page Range	Patrons or Staff
Format	Format of file (TIFF, PDF, MP3)	Patron or Staff
ShippingOption	Format of materials (book & paper, video)	Staff
ForPublication	Indicating if Throwaway	Staff

Condition Review & Digitization





Condition Review & Digitization

Preservation & Conservation Services staff

Workflow includes:

- Item Check-in (Aeon queue change “Order in process”)
- Uploading the data to Airtable
- Condition Review
- Image Capture
- Processing Images and packaging the files for delivery
- Quality Control
- Delivering the files to repository staff (Ingesting the materials to Preservica)
- Item transferred to permanent storage




Managing and Tracking Digitization Requests

- Airtable to track & manage digitization requests
- Aeon fields
 - TN number
 - Folder number
 - Barcode
 - Call#/box#
 - Patron status
 - Material Type
 - Format
 - Page Count
 - Location
 - Notes
 - Pages (s) / throwaway

Tracking digitization requests using Airtable

Job request		Folder...	# ...	Pri...	Start Task
WORKFLOW STEP					
▼ Prep complete / Awaiting scan		Count 4	▼ Sum 0		
1	2358-Patr-mssa-349677 : Zionist Revisionist M...	Folder 4	0	Norma...	Start Task
2	2528-Patr-mssa-359723 : School of Nursing, Ya...	Folder 1292	0	Normal	Start Task
3	2529-Patr-mssa-359723 : School of Nursing, Ya...	Folder 1293	0	Normal	Start Task
4	2530-Patr-mssa-359723 : School of Nursing, Y...	Folder 1298	0	Normal	Start Task
+					
WORKFLOW STEP					
▼ Scanning in progress		Count 1	▼ Sum 0		
5	2268-Patr-mssa-340228 : Stimson (Henry Lewi...	Folder 51	0	Normal	Start Task
+					
WORKFLOW STEP					
▼ Scan complete / Awaiting QA		Count 2	▼ Sum 1		
6	2414-Patr-mssa-346630 : Michael Ivanovitch R...	Folder 15	1	Normal	Start Task
7	2415-Patr-mssa-346630 : Michael Ivanovitch R...	Folder 16	0	Normal	Start Task
+					



File Delivery & Ingest to Preservica

Frontline Services Staff

- Files are delivered to the patron
- Email is sent to the patron with details on how to download the files
- Ingestion to Preservica



Data Collection



FY'22

- Total images captured: 182,919
- 10% of our requests are from Yale students, faculty, staff.
- 1165 Transactions were created during the Fiscal year.

The logo for Goobi features the word "Goobi" in a black, sans-serif font. The letter "o" is replaced by a blue rounded square containing a white infinity symbol. Above the "G", there is a horizontal bar with a teal segment on the left and an orange segment on the right.The logo for Aeon consists of a red circular icon on the left, resembling a camera shutter or a fan with multiple blades radiating from a central point. To the right of the icon, the word "Aeon" is written in a black, serif font.

- Working with intranda, a German software development company, and their Goobi product
- Began with the Aeon 5.0 API
- So far generally satisfied with read endpoints, looking forward to exploring the 5.1 write endpoints
- Goal for the end-state is for Goobi to be able to pick up a digital copy request from Aeon and move it through all queues without direct human work in Aeon



Request Web Pages

SWITCH TO READING ROOM REQUEST

SWITCH TO DIGITAL COPY REQUEST

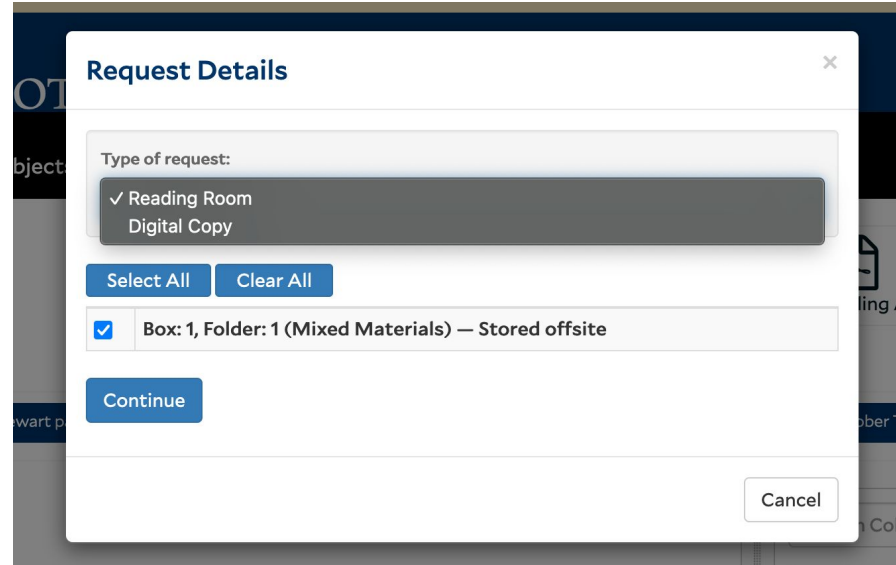
 REQUEST DIGITAL COPY

 Digital Copies

- Balancing user-friendliness, demand, and equity
- We have a lot of stuff that people want to research and a lot of people who want to request digital copies
- We're trying to strike a balance in the web form UX between making it easy for patrons to request digital copies but not let them have too many places to do it or to let them request massive amounts
- Need to try to make sure it's not just the loudest or most in-the-know requesters who get their digital copies



In-Process ArchivesSpace Change



Request Details ✕

Type of request:

- ✓ Reading Room
- Digital Copy

Select All Clear All

Box: 1, Folder: 1 (Mixed Materials) — Stored offsite

Continue

Cancel



Challenges

- Currently not as intuitive as we would like for end users.
- Challenging to enforce order limits.
- Tracking at the box rather than folder or archival object.
- To merge or not to merge.
- Export feature in Aeon doesn't allow you to isolate the notes relevant to digitization
- Notes in the notes field is cannot be printed on the Print digitization slip
- API: Yale account usernames have a backslash, which the API can't handle, so we cannot read info on those users.
- No current way in Aeon to limit digital copy requests per patron by scan count



What's Next?

- 5.1 API
- Migrating local custom fields to standard custom fields
- Merging instances
- Reflection: Evaluating & refining workflows based on data, and staff & patron feedback.
- Integrating payment for AV digitization into Aeon
- File delivery system approval and implementation



Thank you!

Moira Fitzgerald <moira.fitzgerald@yale.edu>

Trip Kirkpatrick <trip.kirkpatrick@yale.edu>

Anu Paul <a.paul@yale.edu>