Workflow Detail: Generic Tasks Applicable to Two or More Modules (Pinned Things)

Module 0 Generic tasks	Module 1 Pre-digitization curation	Module 2A Specimen imaging	Module 2B Whole-drawer imaging	Module 2C Label imaging
Module 3 Image processing	Module 4A Data capture from image	Module 4B Data capture from specimen	Module 4C Event data capture	Module 5 Quality assurance
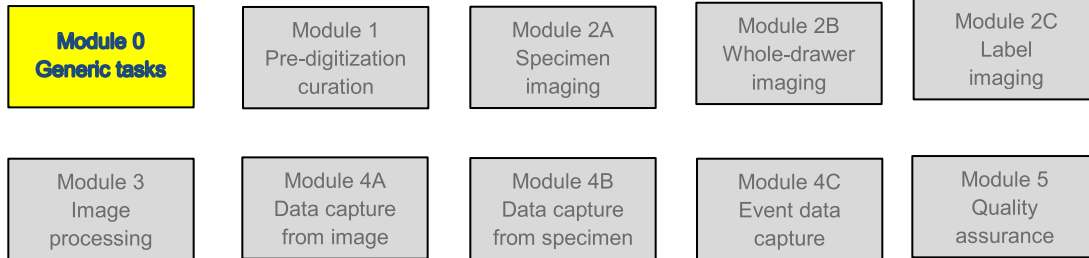
Module 0: Generic Tasks Applicable to Two or More Modules

TaskID	Task Name	Explanations and Comments	Resources
T1	Perform conservation assessment.	Pinned specimens are among the more fragile of preparation types. Hence, conservation should be at the forefront of all digitization modules, tasks, and activities. In consultation with a conservator, perform a conservation assessment of the collection.	Trained conservator. Institutional conservation plan and policy.
T2	Prepare conservation plan.	In consultation with a conservator prepare a conservation plan for all other workflow steps, including conservation of both specimens and labels.	Trained conservator. Institutional conservation plan and policy.
T3	Prepare detailed written protocols outlining institutionally specific workflows for each entomology digitization module expressed herein.	Protocol documents should be distributed to all technicians. Documents should be continuously revised and improved based on input from technicians and	Institutional protocols and training documents.

		collections managers.	
T4	Affix labels to rows, cabinets, and/or drawers to facilitate progress tracking.	Some institutions use pre-printed labels, colored tape, or other markers that allow for recording current stage within the digitization workflow. Labels might include check boxes for recording whether a cabinet or drawer has been curated for digitization, imaged, databased, etc. Drawer and cabinet labels may additionally include barcodes or other unique identifiers for use in collections management. This step applies to any point at which workflow progress or status should be tracked or noted.	Row, cabinet, or drawer labels.
T5	Select and mark specimen-level exemplars to image.	This task might be accomplished at various stages, including pre-digitization curation, image capture, or data capture. The precise point at which it is accomplished should be selected to minimize specimen handling and should be governed by policies instituted in T6. Criteria to be considered in exemplar selection include: ● representation of sexes,	Institutional guidelines.

		- varying geography, locality, or collecting event, - representative polymorphic features per population or collecting event, - specimen quality (to include good positioning, no missing parts, etc.), - outliers and oddities.	
T6	Select/prioritize material to be digitized.	Prioritization goals vary. Example selection criteria include taxonomy, geography, project, collecting event, etc. As part of M0, this step involves global decisions establishing an overall plan for collections digitization, as opposed to day-to-day decisions. Global policy decisions might include rules regarding specimen selection (T5), percentages of drawers to be imaged and/or databased, whether digitization will follow a project-based plan or proceed from the first cabinet to the last, etc. This step includes global prioritization guidelines for whole-drawer imaging.	Institutional policy, project guidelines, active research criteria, etc.
T7	Populate database with authority files.	Create, locate, Identify, import, and use vetted authority files where available, including	- Online and printed catalogs - Colleagues

		authority files local to the institution, to include those for collector names, geography, localities, and taxonomic catalogs by specialists (e.g. resources from SpeciesFile, Scratchpads, iDigBio, and others). Targeted catalogs should correlate with material prioritized for digitization in T6.	● Lists prepared by specialists ● Taxon name lists ● iDigBio.org
T8	Alert data entry technicians to label peculiarities.	School data technicians on particular label characteristics peculiar to the collection, including peculiarities of handwriting or frequent occurrence of cryptic notations made by major collectors or identifiers/describers represented in the collection.	
T9	Provide data entry technicians with test datasets from known canonical test records and compare with resulting data keying.	Data entry personnel are presented with images or specimens for which the correct transcription is known, and their transcription is compared to the correct version for feedback, training, and technician selection.	