

Module 0: Pre-digitization Curation and Setup

Task ID	Task Name	Explanations and Comments	Resources
T1	Prioritize specimens, collection objects, ledgers, field notes, and catalogs to digitize.	Varies by institution. Should follow institutional digitization policies and guidelines.	<ul style="list-style-type: none"> ● Institutional policy. ● project guidelines. ● active research criteria, etc.
T2	Note damage to object to be digitized that needs immediate attention.	Route to conservation workflow as necessary, based on institutional policy or curatorial practices.	Institutionally specific curation guidelines.
T3	Update specimen taxonomy (and related authority files) as necessary.	This may happen prior to the digitization of any taxonomic group. Some institutions update specimens with expert determinations prior to digitization. Others record determinations from the label in anticipation of community involvement in helping correct determinations.	According to institutional protocol and procedures and/or project requirements.
T4	Update specimen identifications and determinations in collection and authority files in database.	<p>This may involve augmenting existing data records and correcting database errors, locality numbers, and preparations.</p> <p>This task should be accomplished by a trained technician to curtail spelling errors and mis-parentings.</p>	
T5	Create catalog numbers for individual specimens in a slab or lot.	Strategies vary, dependent upon institutional and/or collections policies, the need for identifiers for individual specimens for	Institutional or collections policy.

		<p>specific purposes, and in preparation for exemplar imaging.</p> <p>Institutions vary. Some will assign numbers to all specimens in a slab or lot at this stage. Others will assign catalog numbers only to those to be databased or imaged.</p>	
T6	Associate institutionally and/or globally unique identifiers with collection objects.	<p>The point at which unique identifiers are assigned and the identifiers placed on the collection object varies by institution and may alternatively be included in other modules.</p> <p>Associating a Globally Unique Identifier (GUID) with each physical collection object facilitates tracking that object and related objects across the internet. It also ensures that every electronic record about an object can be recognized as related to that object. GUIDs might be assigned at a later stage in the workflow. If not, they are assigned here.</p> <p>A collection object may have more than one GUID, but a GUID must refer to one and only one object and must be persistent, meaning that the same GUID should not be re-used, even if the object is destroyed or de-accessioned.</p>	<p>Write directly on collection object (using archival quality ink), or use B-72/gesso and then number, or affix printed number to collection object, or bag printed number with collection object.</p> <p>Dependent on requirements of collection object and institutional policy.</p>
T7	Set up image naming convention.		Institutionally specific policies and protocols for governing

			<p>standard file-naming strategies.</p> <p>See https://www.idigbio.org/content/idigbio-image-file-format-requirements-and-recommendations</p>
--	--	--	--