

The University of British Columbia Library	Document No.	###
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Title	Digital Material Survey for Donations	

Donor name:

Donor affiliation (if any):

Archivist name:

Digital Material Survey (Part I)

1. Digital Material Creation

- 1.1. Are you the only person responsible for creating your digital files?
 - 1.1.1. If not, who else is involved and what is their role? (for each one list last, first, role [author, editor, secretary, proofreader, admin, ...])
- 1.2. Do you maintain digital files created by others?
 - 1.2.1. If yes, how do you separate your files from files created by others?
- 1.3. Do you separate your personal files from your work files?
- 1.4. What is the earliest creation date (roughly) of your digital files?
- 1.5. What is the latest creation date (roughly) of your digital files?
- 1.6. What software and computer system was used to create these files? Did this change over time?
- 1.7. What kind of camera did you use to shoot digital images? Did this change over time?

2. Varieties of Digital Material

- 2.1. What kinds of materials are you donating today? Are they in specific formats (TIF, JPEG)?
- 2.2. Do you create files in both digital and paper formats?
 - 2.2.1. If yes, which files or file types are paper? Which files or file types are digital?
 - 2.2.2. Do you have printouts of digital files that you will donate?
 - 2.2.3. Do you also have prints of your digital images that you will donate?

- 2.3. What do you consider the definitive version of the file(s)? (this could differ by content type)
- 2.4. What is the total volume of each file format? (in MB, GB, etc)
- 2.5. Do you distinguish in the files or the filing system between published, non published and re-published photographs?
- 2.6. Do you think you will want to reuse or republish the digital images that you donate?
- 2.7. Do you have signed rights or clearances from subjects in your digital images?

3. Digital Material Organization

- 3.1. How are digital files named?
- 3.2. Is some kind of version control used?
 - 3.2.1. If yes, list examples
- 3.3. How are digital files organized? Can you give a brief summary about the organization of your digital files? (obtain classification scheme if available)
 - 3.3.1. Are digital files destroyed in regular intervals?
 - 3.3.1.1. What is the interval? (obtain retention schedule if available)
- 3.4. Do you use more than one computer or device? (e.g. office desktop, office laptop, home desktop, smart phone, tablet, etc.)
 - 3.4.1. If yes, how do you synchronize files between different computers? (server, etc.)
- 3.5. Please explain fully your process of adding or creating metadata for your digital images.
 - 3.5.1. Which programs do you use to create metadata for your digital images?
 - 3.5.2. Do you use templates or a metadata standard such as Dublin Core?
 - 3.5.2.1. If so, do you use them for one group, all, some?
 - 3.5.2.2. Is there one template or many?
 - 3.5.2.3. Can we get a printout of your templates?
 - 3.5.3. Do you use the same metadata for all the photos, or do you customize it for all, some, etc.?
- 3.6. Do you wish to retain the copyright for the material you are donating?
 - 3.6.1.
 - 3.6.2. Are there any photographs for which the copyright has been assigned to someone else (e.g. a magazine, etc).

4. Digital Photographs

- 4.1. Which do you consider the original (jpg, raw, tif...?)
- 4.2. Do you use geocoding?
- 4.3. What devices do you use to store your photographs?

5. Email

- 5.1. Do you have multiple email accounts?
- 5.2. Which email program(s) / service(s) are you using? (e.g. Email program provided by your workplace, Outlook, Mac Mail, Hotmail, Gmail, Yahoo! Mail, etc.)
- 5.3. How is email organized? (e.g. in self-created email folders, etc.)
- 5.4. How is email saved? (e.g. untouched in the email program, a copy in your PC, printed out in paper, etc.)
 - 5.4.1. Are email and paper correspondence managed together or separately?
- 5.5. Do you use address books?
 - 5.5.1. Please list address books

6. Social Media

- 6.1. Do you have social media accounts? i.e. Facebook, Twitter, Tumblr, LinkedIn, SnapChat, etc.
 - 6.1.1. Please list all social media accounts
- 6.2. Do you have/maintain blog(s)?
 - 6.2.1. Please list all blogs

7. Digital Files Storage / Backup

- 7.1. Do you have a backup routine for your files / emails?
- 7.2. What media are used for backup files? (e.g. optical disc, hard drive, file server, web-based / cloud service etc.)
- 7.3. How recently have you changed computers? Do you transfer files from your old computer to your new computer?
 - 7.3.1. If yes, what types of files are transferred?
 - 7.3.2. Did you encounter any problems in transferring the files?
 - 7.3.3. Please list problems encountered.
- 7.4. Do you keep your old computers?
 - 7.4.1. Please list details. [computer name(s), operating system(s), version(s)]
- 7.5. Have you ever experienced a serious hardware failure (e.g. hard-drive crash, loss of files, accidental deletion)?
 - 7.5.1. If yes, were the files in the affected computer recovered?
 - 7.5.2. If no, would like us to attempt to recover the files as part of your donation?
 - 7.5.2.1. If yes, which ones?
- 7.6. Are any digital files stored on temporary external storage media? (e.g. punch cards, 8 inch. floppy diskettes, USB drives, optical discs, Zip disks, etc.)
 - 7.6.1. Please list media types.

8. Work Habits

- 8.1. Can you tell us about your work habits of using computers / mobile device? (e.g. work online, work offline, use mobile, etc.)
- 8.2. Do you share computer with other people?
- 8.3. Since a visual representation of working space may provide researchers additional information about your works, do you mind we take photos of your computer with surrounding space?

9. Privacy and Security

- 9.1. Are some digital file types of a sensitive nature? (e.g. tax records, medical records, peer-review comments, letters of recommendation, student records, etc.)
 - 9.1.1. Please list categories of files and their restrictions.
- 9.2. Are there files that you would want restricted?
 - 9.2.1. If yes, please provide details so that we can act upon when we encounter such files when processing your files.
- 9.3. Do any digital files require passwords?
 - 9.3.1. Where are user names and passwords kept?
 - 9.3.2. What service / software are used to save them?
- 9.4. Do you use digital watermarks?
 - 9.4.1. Please list files and watermark rationale.

10. File Transfer Arrangement

- 10.1. Are there files you would like to transfer to us later?
 - 10.1.1. Which files?
 - 10.1.2. When?
- 10.2. Can we take the original computer(s) or storage media?
 - 10.2.1. If yes, do you want the original media back once we've processed the donation? If no, we will destroy the original media once the donation is processed.
 - 10.2.2. What storage media will you deliver? [original hard drive, copy on external drive, optical disc, etc.]
 - 10.2.3. If external drive, how is it formatted? (operating system, version)
- 10.3. Can we (1) take a complete disc image including deleted files and file logs, (2) copy all active folders and files from the hard drive or (3) copy designated folders and files? Will you allow access to deleted files?
- 10.4. Were these hard drives used for anything else (e.g., digital files you do not wish to transfer)?

Digital Material Survey (Part II)

Note: This part of the survey is designed to be filled out by digital archivists regarding technical details of the tools used to create digital material.

1. Hardware

- 1.1. List the hardware configurations of each computers / mobile device. (e.g. manufacturer, model no, cpu, ram, hard drive capacity, video card, etc.)
- 1.2. Find out if the computers have USB ports or CD writers which could be used to copy the digital files.

2. Software

- 2.1. List the operating system and other system software with version number, installed in all the hardware.
- 2.2. Check if system date and time are set correctly. List the time zone used, if any.
- 2.3. With the help of the donor, list the main application software, with version no., used to create digital files.
- 2.4. If Microsoft Office is used, find out if the "User Name" field is set to the name of the donor. Find out similar setting for other main application software used.

3. Internet Access

- 3.1. Find out if the digital archivist can use the Internet access in the donor's office using the digital archivist's portable computer?

4. Networking

- 4.1. With the help of the donor, confirm if the computer is connected to file servers. Confirm if the donor saves files in the file server. How much file server space is used by the donor?

5. Security

- 5.1. With the help of the donor, confirm if login is required to access desktop computers / mobile devices.
- 5.2. With the help of the donor, confirm if a digital certificate is used by the donor to login / sign digital files / encrypt digital files.
- 5.3. With the help of the donor, confirm if digital files are encrypted.

Notes and comments (per section and per survey)