



Digital Collecting in Times of Crisis: Survey and Toolkit

Kara M. McClurken
(on behalf of the project team)
LYRASIS Catalyst Fund Webinar
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Project Team



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PART 1

The Need

The Need



- 2012: Removal/reinstatement of UVA President Teresa Sullivan
- 2014: Rolling Stone publication/retraction of “A Rape on Campus”
- August 11-12, 2017
 - “Unite the Right” rally to protest removal of confederate statues
 - White supremacist/Nazi rally on University Grounds
 - Protests and counter-protests throughout City of Charlottesville
 - Vehicular homicide

<http://digitalcollecting.lib.virginia.edu/rally/items/show/110>

The Need

- August 11-12: Started capturing tweets
- August 13: [URL nomination form](#):
- August 14th: expand URL nomination form
(Target launch date: August 17th)
- Actual launch: September 6th



<http://digitalcollecting.lib.virginia.edu/rally/items/show/17>

Contribute Materials

Recognizing the significance of events on the weekend of August 12, the University of Virginia Library is building an archive of materials surrounding the "Unite the Right" rally and counter-protests.

Want to donate your media?

Great! Use this [Collection Form](#) to contribute your digital materials.

If you have a large number of items, or large-sized files (like video) to contribute:

- UNIVERSITY
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Project plan

- Survey
- Improve current site to serve as model template
 - Navigation and visual facelift
 - Searchability
 - Legalese
- Create digital collecting toolkit
 - Infrastructure planning
 - Using our collecting theme
 - Social media tools (emphasis on Twitter)

PART 2

The Survey

Survey Background

- Preliminary survey launched Spring 2018
- Final survey launched August-Sept 2018
- 21 questions
- Survey open for 6 weeks
- 78 institutions responded
- Analysis of report found here:

<https://doi.org/10.18130/v3-8p1n-5w09>

Key Takeaways from Survey

How many of you have
experienced an event
that required a rapid
response?

57%

Key Takeaways from Survey

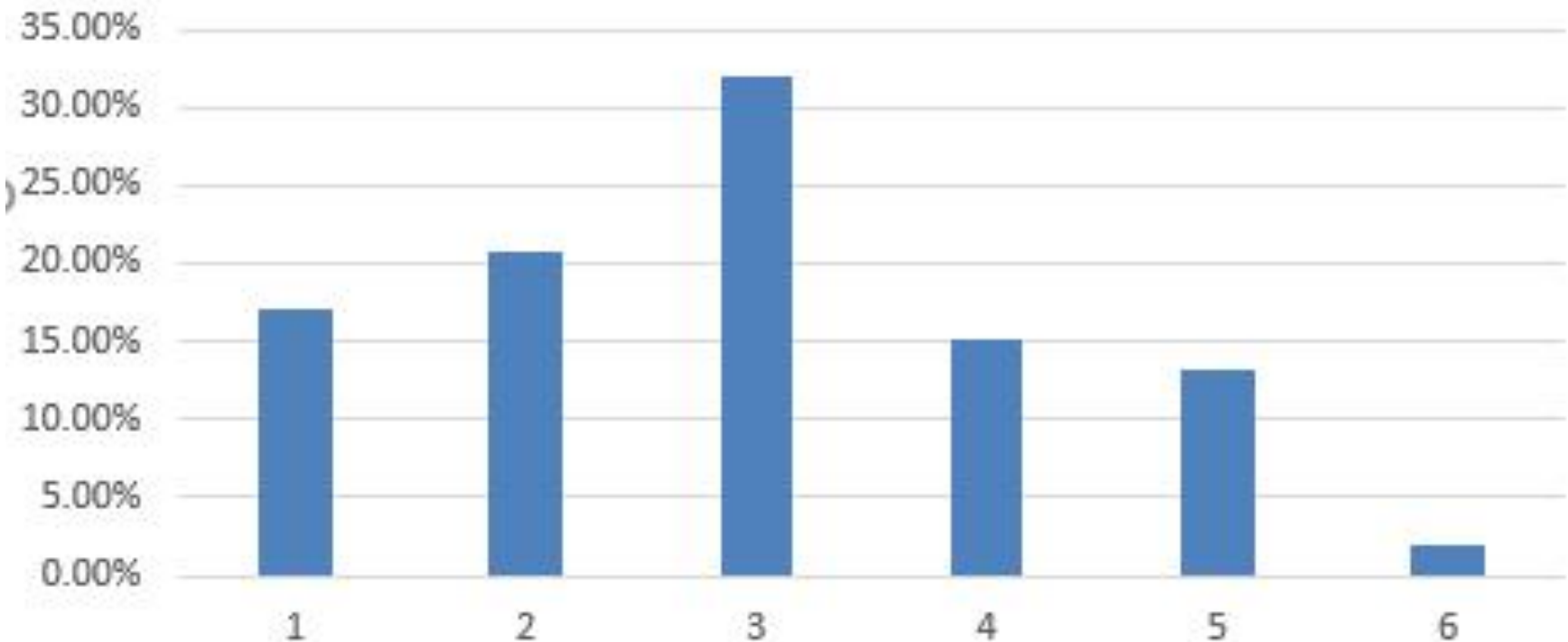
How prepared do you feel to respond quickly and effectively to an emergency digital collecting event?

Scale of 1 to 6

- 1 = Least prepared
- 6 = Most prepared

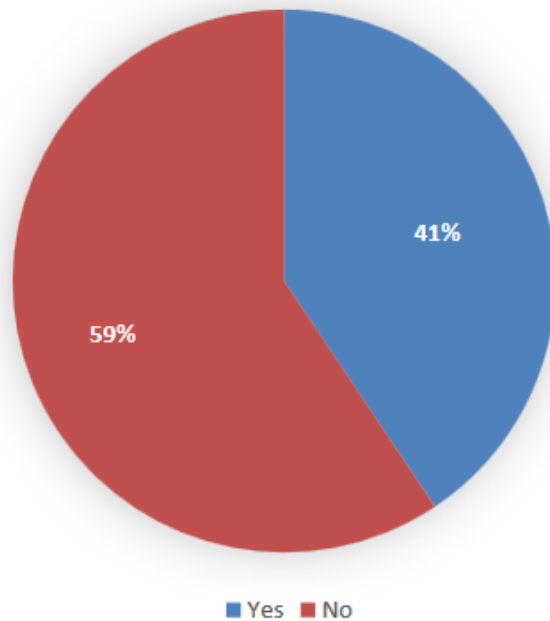
Key Takeaways from Survey

On a scale of 1 to 6, with 1 being least prepared and 6 being most prepared, how well are you prepared to respond to such an event?



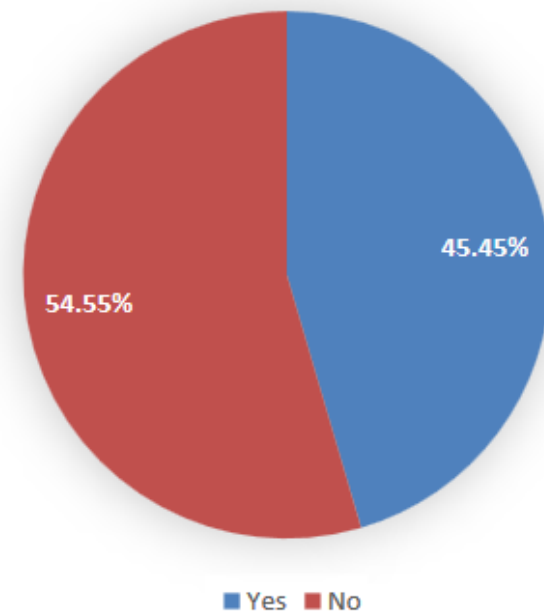
Key Takeaways from Survey

Q7: If you have experienced an emergency digital collecting event, did you contact any other institutions for advice?



Reach Out

Q9: Were others outside the institution or organization (e.g. community partners, other schools or cultural organizations) involved in planning or helping gather material?



Key Takeaways from Survey

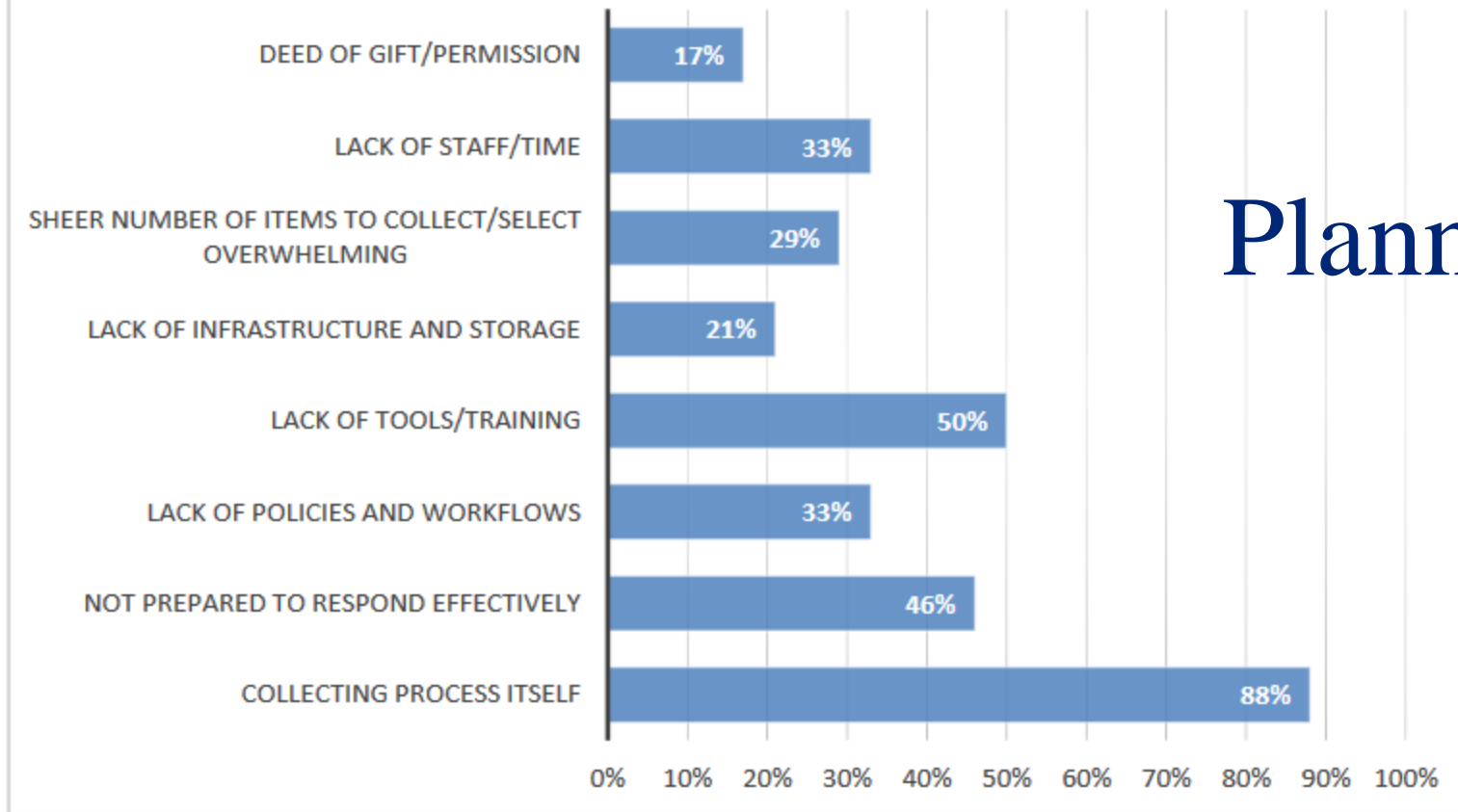
Tools



Word cloud documenting responses to question 11: What tools or services did you use?

Key Takeaways from Survey

Q13: What challenges did you face?

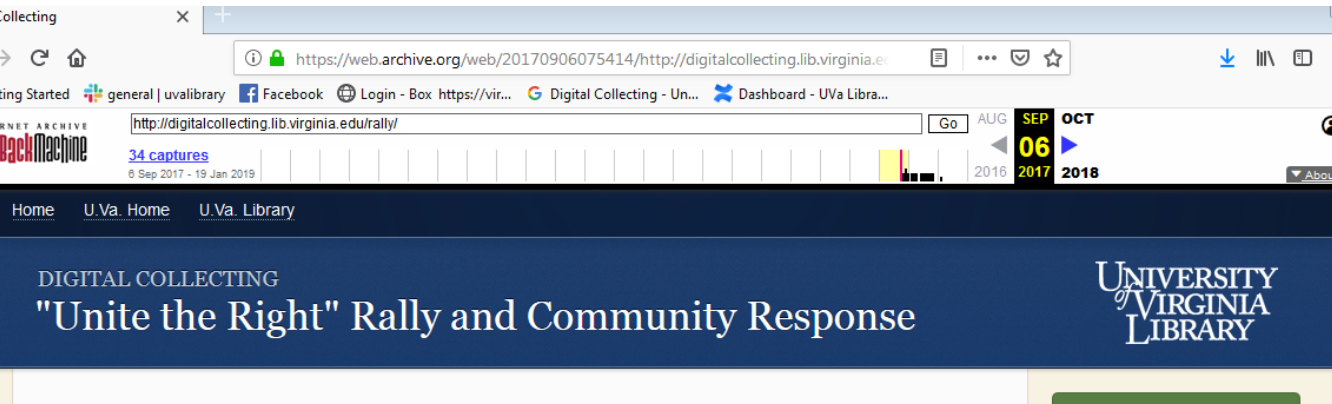


Planning

PART 3

Improving the Rally Theme

Digital Collecting Theme



Many members of our community are still reeling from the events of August 11. Right* rally and counter-protests saw loss of life, physical violence, and comm international media coverage in Charlottesville. Our community will be recover forward for a long time to come.

Building the archive

Recognizing the significance of events on the weekend of August 12, the University of materials surrounding the "Unite the Right" rally and counter-protests.

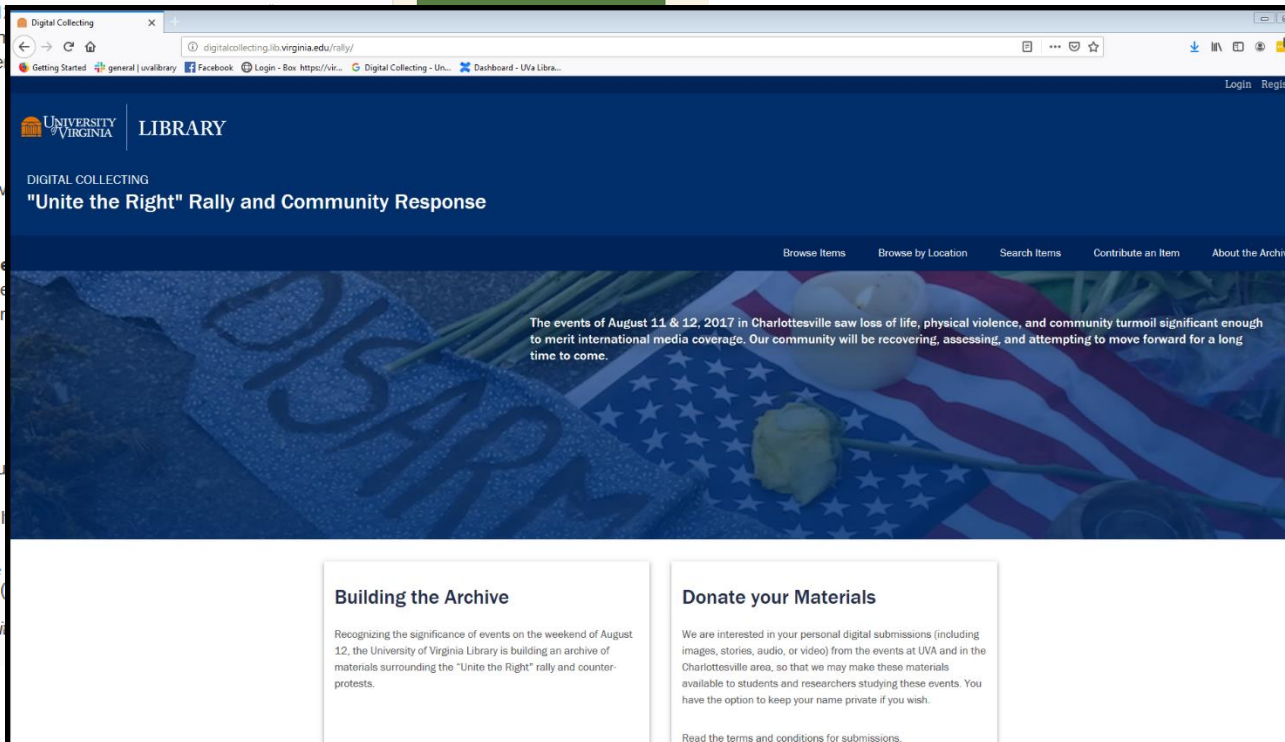
We are interested in your personal digital submissions (including image events at UVA and in the Charlottesville area, so that we may make these researchers studying these events. You have the option to keep your name pr

Want to donate your media?

[Great! Use this Collection Form to contribute your digital materials.](#)

If you have a large number of items, or large-sized files (like video) to contribute

- The best way to submit materials is through the [Collections Form](#). If you have any questions, please email us at digital_collecting@virginia.edu and we'll be happy to help.
- If you have a large number of files to submit and you'd rather not use the [Collections Form](#) to provide us with a URL for an album or file location (e.g., a folder on a server), please contact us at digital_collecting@virginia.edu.
 - **Note:** We will make our best effort to capture media linked in submission, but we cannot guarantee that we will be able to fully capture all materials received in this way.



Building the Archive

Recognizing the significance of events on the weekend of August 12, the University of Virginia Library is building an archive of materials surrounding the “Unite the Right” rally and counter-protests.

ABOUT THE PROJECT

Donate your Materials

We are interested in your personal digital submissions (including images, stories, audio, or video) from the events at UVA and in the Charlottesville area, so that we may make these materials available to students and researchers studying these events. You have the option to keep your name private if you wish.

Read the [terms and conditions](#) for submissions.

CONTRIBUTE MATERIALS

Statement of Values

The University of Virginia stands firmly behind the [Society of American Archivists’ commitment to ensuring the diversity of archivists](#) and the archival record.

Read the [SAA Council statement](#) about events of 8/12.

Questions?

Contact us at digital_collecting@virginia.edu.

Browse the Digital Collection



Photos



Videos



Stories



Links

Featured Items

Too Close



The police force was taking formation so that the protesters could not get to the statue.

Black Lives Matter



This was taken moments before the grey mustang rammed through 4th street. The pack of counter-protesters were deciding whether to turn left or right,....

Kudzu Leaf from Lee Statue



From Nov 9 installation on Lee Statue in front of Albemarle Circuit Court



LIBRARY

DIGITAL COLLECTING

"Unite the Right" Rally and Community Response

[Browse Items](#)

[Browse by Location](#)

[Search Items](#)

[Contribute an Item](#)

[About the Archive](#)

Search Items

Search for Keywords

Search By Type

Select Below ▾

Search By Collection

Select Below ▾

Narrow by Specific Fields [Add a Field](#)

Select Below ▾

Select Below ▾


PART 4

The Toolkit


Digital Collecting Toolkit

digitalcollecting.lib.virginia.edu/toolkit/

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Welcome to the Digital Collecting Toolkit!

What is this Toolkit?

This toolkit is designed to provide resources and instruction on implementing digital collecting strategies during and after rapidly evolving social events and/or community crises (like campus controversies, natural disasters and public emergencies). Emergency digital collecting requires a rapid response and poses a particular set of challenges not normally found in routine digital collecting initiatives. Photos, videos, and social media content are major components of these community experiences, and the tools offered here can help organizations, institutions and communities implement an effective emergency digital collecting initiative.

Who is this for?

Our team includes University preservation librarians, digital preservation specialists, archivists, digital content developers, and IT specialists. We developed this toolkit for use by a wide range of cultural institutions and communities with an interest in quickly setting up a digital collection site and in developing a plan for emergency digital collecting. Members of University libraries, other educational institutions, and community organizations using this toolkit will need to have some level of access to the tools provided here to implement this type of digital collection strategy. This could include access to web hosting, server space, and an [Omeka](#) installation. However, we have included a range of potential options for these requirements in this toolkit.

How do I get started?

This toolkit is designed so you can get started quickly!


- Read the [basics](#) on preparing for an event that requires emergency digital collecting and getting your community collection site up and running.
- See the steps for setting up an [Omeka Collection Site](#).

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Getting Started | Digital Collecting

digitalcollecting.lib.virginia.edu/toolkit/docs/getting-started/

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- Funding Opportunities

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The basics for preparing for a rapid response digital collecting event and building a digital collection site.

Below are some steps that you can take to prepare for an emergency event that requires a plan for digital collecting.

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c

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Gathering a Team

In order for your digital collecting strategies to be successful, you may need to gather experts from across your organization. Here are some areas of expertise and types of responsibilities those team members might have:


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Setting Up Omeka Classic

The University of Virginia Library's Digital Collecting site, ["Unite the Right" Rally and Community Response](#) runs on [Omeka Classic](#).

[Omeka](#) is a leading open source collections-based web publishing platform developed by the [Roy Rosenzweig Center for History and New Media](#) and supports a robust open source developer community. Omeka is standards-based, grounded in a flexible [Dublin Core Metadata Schema](#). Omeka takes a user-centered, access-focused approach to collections, emphasizing approachable, accessible web design.

Technical Specifications

If you are a member of a university or institution with an accessible IT Department or Digital Content Developers, we recommend reaching out to individuals in your organization with experience setting up Omeka.

Omeka Classic has the following system requirements:

- Linux operating system
- [Apache](#) HTTP server (with `mod_rewrite` enabled)
- [MySQL](#) version 5.0 or greater
- [PHP](#) scripting language version 5.3.2 or greater (with mysqli and exif extensions installed)
- [ImageMagick](#) image manipulation software (for resizing images)

If you lack access to a server that meets Omeka's basic requirements, or are looking for a **simpler and less technical set-up process**, we recommend [Reclaim Hosting](#), a low-cost shared web host offering one-click Omeka installation, with a free domain registration included. Their support staff is easy to reach and their [Community Forum](#) offers additional resources.

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- Administering your Omeka Classic Site

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- [ImageMagick](#) image manipulation software (for resizing images)

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- [Reclaim Hosting](#)
- [Installing Omeka Classic on Reclaim Hosting](#)
- [Uploading Plugins and Themes to Omeka on Reclaim Hosting](#)
- [Working with Omeka Classic on Reclaim Hosting](#)
- [Omeka on Reclaim: Community Forum](#)

Omeka also provides a list of suggestions for low-cost shared web hosts that offer the server environment required for Omeka, see [here](#) for details.

Custom Omeka Theme | Digital X

digitalcollecting.lib.virginia.edu/toolkit/docs/omeka-setup/custom-theme/

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Omeka Classic Setup / Custom Omeka Theme

Custom Omeka Theme

Our [Digital Collecting](#) site uses a custom Omeka Theme: [Charlottesville Rally Theme](#). We developed this theme specifically for use in digital collecting sites, making it simple to customize the content and appearance of your public site directly from your Omeka Dashboard - no coding knowledge required.

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GitHub - scholarslab/cville_rally_theme

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scholarslab / cville_rally_theme Watch 10 Star 0 Fork 0

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Omeka theme for Charlottesville rally archive

omeka omeka-theme cville-rally-archive

89 commits 1 branch 0 releases 3 contributors

Branch: master New pull request Find File Clone or download

earn5 update header		Latest commit 4f580a9 on Jun 20
_sass	update header	last month
collections	add styling for collections pages close#22	5 months ago
common	update header	last month
contribution/contribution	fix typos and styling	3 months ago
css	update header	last month
images	update theme config, remove typekit,tracking, remove search by locati...	2 months ago
items	update theme config, remove typekit,tracking, remove search by locati...	2 months ago
javascripts	Adds date picker for contribution form.	2 years ago
search	adds new pages, updates styles	5 months ago
simple-pages/page	update homepage	3 months ago
.gitignore	update gitignore	5 months ago

Custom Omeka Theme | Digiti X

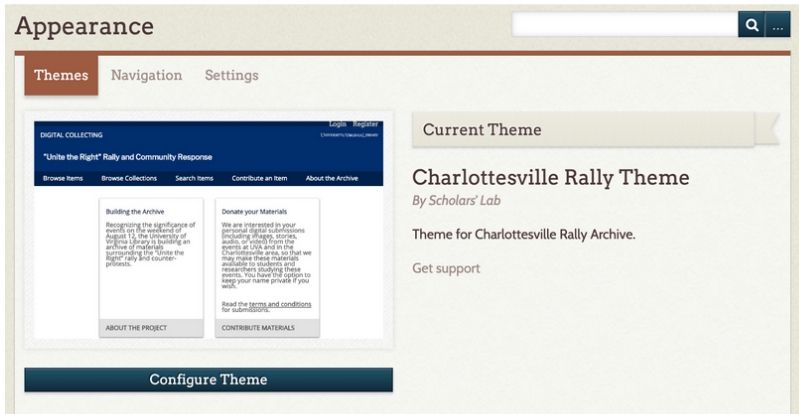
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Steps for Installing our Custom Theme

- 1 Download and unzip our [custom theme from Github](#). Download the .zip file to your desktop for easy retrieval.
- 2 Locate your Omeka installation and login to access your site.
- 3 Navigate to your Omeka folder (this should have the same name as your Omeka install)
- 4 Open your Omeka folder and locate the '/themes' folder within.
- 5 Copy or move the unzipped 'cville_rally_theme' folder from your desktop (or from where you saved this folder) and place it within the 'omeka/themes' folder located in step #4.
- 6 Log in to your Omeka admin panel (found at the url: 'your-site-url/admin'), and click on the 'Appearance' option in the top navigation bar.
- 7 The custom theme should now be installed and visible (see screenshot below). If not, double-check that the folder is in the right location ('/themes') and that the folder name for the theme does not start with 'theme-'.



The screenshot shows the Omeka 'Appearance' page. The 'Themes' tab is selected, displaying a preview of the 'Charlottesville Rally Theme'. The preview includes a header with 'DIGITAL COLLECTING' and 'UVA LIBRARY', a navigation bar with links like 'Browse Items', 'Browse Collections', 'Search Items', 'Contribute an Item', and 'About the Archive', and a main content area with sections for 'Building the Archive' and 'Donate your Materials'. To the right of the preview, the 'Current Theme' is listed as 'Charlottesville Rally Theme' by 'Scholars' Lab'. Below this, there is a 'Get support' link and a 'Configure Theme' button at the bottom.

Custom Omeka Theme | Digita

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Customize your Site's Homepage Content

Use this section to provide content for your site's homepage. All of these sections are optional, pick and choose what works best for your site.

HOMEPAGE BANNER

Homepage

Homepage Banner Background

Choose an image file for your homepage banner background. File size must be no larger than 300kB.

Change

Homepage Banner Introduction Text

Add some brief introductory text to be displayed on your homepage banner.

B

I

U

Paragraph

The events of August 11 & 12, 2017 saw loss of life, physical violence, and community turmoil significant enough to merit international media coverage in Charlottesville. Our community will be recovering, assessing, and attempting to move forward for a long time to come.


- Homepage Banner Background:** Provide an image file to be used on the homepage introduction banner. File must be no larger than 300kb, and will automatically be centered and scaled to fit. Your image will be overlaid with a color gradient, as selected in **Header Color**.
- Homepage Banner Introduction Text:** Provide some brief text to display on your banner image. This text will appear in the same color as selected in **Header Text Color**.

Both the banner image and introduction text are optional, and can be used together or individually. If no image and no text is provided, your site will not have a banner. If you provide introduction text but no image, your text will display over a color gradient banner, the color selected in **Header Color**. If you provide a banner image with no introduction text, your image will not have the color overlay. In this case, if you'd like the color overlay on your image, type in a few blank spaces into the introduction text box (no text, just use your space bar to fill in some blank content).


Collecting Community Contrib X

digitalcollecting.lib.virginia.edu/toolkit/docs/omeka-setup/collecting-materials/

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[Omeka Classic Setup](#) / Collecting Community Contributions

Collecting Community Contributions

We've included detailed documentation on how our [Digital Collecting](#) site uses the [Contribution plugin](#) for Omeka to collect stories, images, videos, and links from the public.

Please read through the plugin's [Installation & Configuration Guide](#) for full set-up instructions before getting started.

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What to Collect

Using the Omeka Contribution plugin, you can collect a wide variety of materials from the public through a content submission form on your site. You can update your plugin settings and Contribution Types at any time, but it is good to consider what content you are interested in collecting when first setting up your site. Contributions are private by default and require a site administrator to review and make them public on your Omeka site.

Our site collects stories, photos/scanned images, videos and website links - each of these corresponding to

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Collecting Community Contrib: X

digitalcollecting.lib.virginia.edu/toolkit/docs/omeka-setup/collecting-materials/#contributor-anonymity-settings

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Contributor Anonymity Settings

Under the tab for "Submission Settings" you can set options for contributor anonymity. Our site allows both Non-Registered Contributions and Anonymous Contributions:

Allow Non-registered Contributions	<p>This will require an email address from contributors, and create a guest user from that information. If those users want to use the account, they will have to request a new password for the account. If you want to collect additional information about contributors, they must create an account. See documentation for details.</p> <input checked="" type="checkbox"/>
Allow Anonymous Contributions	<p>If non-registered contributions are allowed above, this option allows contributors to remain completely anonymous, even to administrators. A dummy user account will be created that stores no identifying information. See documentation for details.</p> <input checked="" type="checkbox"/>

It is important to make clear in your Terms of Service that user anonymity is conditional, and it is likely that under a lawful subpoena or court order, all submissions and associated data may be required to be provided to federal, state, or local law enforcement or other government agencies. See our [Terms of Service](#) section for more details.

For further documentation on Contribution Submission Settings and Contributor anonymity settings, see the related [Omeka Documentation](#).

Contribution Terms of Service

We offer a general Contribution Terms of Service template for others as a model. [Our terms](#) were written in collaboration with University of Virginia General Council. We recommend reviewing your terms with relevant parties for your own collecting site.

Contribution Terms of Service:

You are being asked to contribute your recollections, photographic images, video, social media postings or other digital content to [insert institution here], which is creating a digital record of the [describe event, location, and date(s) here].

You may only submit material created entirely by you and not copied from or based, in whole or in part, upon any other photographic, literary, or other material, except to the extent that such material is in the public domain, or you have permission of the copyright owner, or its use is allowed by "Fair Use" as prescribed by the terms of United States copyright law. If you would like to refer or nominate material which you do not own, please contact [insert first name and last name and email address and phone number here].

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Setting up your Twitter Account for Collecting

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Steps for Creating a Twitter Application

Please note that these instructions may be subject to change with updates to Twitter. If the following steps and screenshots do not match precisely, please use this as a general guide, or contact [DocNow](#).

1 If you do not have a twitter account, create one at [twitter.com](#). A twitter account is required for access to twitter data.

2 Log into you twitter account to set-up and and authorize a twitter application. A Twitter application will let you download twitter data using Python.

Create an app at [developer.twitter.com/en/apps](#)

Following the above link should bring you to this page:

Developer | Use cases | Products | Docs | More | Apply | Apps

Apps

Create an app

No apps here.


You'll need an app and API key in order to authenticate and integrate with most Twitter developer products. Create an app to get your API key.

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Twarc Introductory Lesson | Dig X

digitalcollecting.lib.virginia.edu/toolkit/docs/social-media/collect-tweets/

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[Start Collecting: Twarc Command Basics](#)

a

[Collecting Tweets](#)

b

[Dehydrate your Dataset](#)

c

[Rehydrate a Dataset](#)

Why Collect Tweets?

Twitter is undeniably a part of the cultural landscape of the modern world, and its content represents a new form of the historical record, one that archivists around the world are actively working to preserve.

Particularly relevant to researchers interested in exploring popular movements, the dynamics of fast-moving

PART 5

Lessons Learned

Lessons Learned: Survey

- Survey challenges
 - Lack of demographic data
 - Lack of permissions to post raw data
 - Underestimated time needed to do data analysis



<http://digitalcollecting.lib.virginia.edu/rally/items/show/131>

Lessons Learned: Terms of Service

Contribution Terms of Service

You are being asked to contribute your recollections, photographic images, video, and/or other media to the University of Virginia (UVA), which is developing a permanent digital record of the events surrounding the Unite the Right rally and counter protests in Charlottesville, Virginia, in August 2017. You represent and warrant that the material you submit was created by you and was not copied from or based, in whole or in part, upon any other photographic, literary, or other material.

Your participation in this project will allow the general public, as well as future University students and historians, to gain a greater understanding of these events and the response to them. You must be 18 years of age or older to submit material to us. Your submission of material constitutes your permission for, and consent to, its dissemination and use in connection with the research and teaching mission of the University of Virginia in all media in perpetuity.

If you indicate on the form that your submission is "public," your material may be published on the web (with or without your name, depending on what you have indicated) as part of the Library's digital collections or exhibits. Otherwise, your response will only be available to Library-approved researchers. Submitted material must not violate any confidentiality, privacy, security or other laws. Please be aware that all submissions and any information associated with the submissions (email address, descriptive information, etc.) may be provided to federal, state, or local law enforcement or other government agencies pursuant to a lawful subpoena or court order. We reserve the right to discard or mark private any submission that UVA Library staff identify as offensive or irrelevant, or for any other reason within their professional judgment.

SUMMARY OF TERMS*

- You must be at least 18 years old.
- Submitted material must be owned and/or created by you.
- You have the option of making your contribution public or private. If public, your content may be published as part of the Library's digital collections (with or without your name displayed, depending on what you have indicated).
- All submissions will be available to Library-approved researchers and can be used by the Library from now on in support of its teaching and research mission.
- Your submission must not violate any laws. If we receive a lawful subpoena or court order, we may be required to turn over any submissions and related information (email address, descriptive information, etc.).

*This summary is to help you read and understand the terms, but does not replace them. Your submission is governed by the full terms of use.

- Transparency
- Anonymous and/or reading room only options
- Added summary of terms for readability

Lessons Learned: Terms of Service

- We do not own copyright of content submitted through the portal
- Impact:
 - Researchers are often frustrated
 - Educating researchers about how to seek permissions and/or apply fair use
 - <https://cmsimpact.org/code/documentary-filmmakers-statement-of-best-practices-in-fair-use/>
 - Cannot share this content beyond UVA (e.g. DPLA)

Lessons Learned: Collecting Tool

- Security plug-ins
- Sustainability of step-by-step instructions
- Documenting other collecting tools/versions

What's Next?

- Classroom support and curriculum development
- Continue work on a malware plug-in
- Workshops
 - Introduction to Emergency Digital Collecting
 - Next session:
April 15th via LYRASIS
 - Hands-on (daylong) training
 - ALA ALCTS Pre-Conference



Hands On Workshop

Digital Cataloging in Times of Crisis: Crisis and routine Acquisition, Description, and Preservation of Community Created Digital Collections

Friday, June 26, 8:00 a.m. – 4:00 p.m. | event code: ALC3 | [Register](#)

When natural disasters or other crises hits a community, libraries are often at the center of efforts to collect and document the tragedy. Increasingly, that documentation comes in digital formats. Few libraries are prepared with tools and infrastructure to acquire, describe, and preserve this content. This full-day workshop will teach participants the fundamental infrastructure needed for digital collecting, low-cost tools needed to capture digital content, and provide hands-on exercises to practice an effective response.

At the end of this preconference, participants will:

- Understand the infrastructure (staffing, tools, workflows) needed to effectively respond to an event that requires rapid or routine collection of digital content.
- Experience hands-on practice using a variety of digital collecting tools (e.g. Twarc, Omeka, Google forms, Webrecorder, etc.)
- Understand ethical considerations related to community-contributed content (e.g. providing clear terms of service, informed consent and privacy, potential for harm, and censoring or restricting content).
- Assess current strengths and weaknesses in an institution's current infrastructure for rapidly responding to digital collecting events.

****Attendees will need to bring their own laptop****[More](#) | [Register](#)

Presenters: Kara McClurken, Director, Preservation Services, University of Virginia Library, Jeremy Boggs, Head of Research and Development, UVA Library Scholars' Lab, Clemons Library, Elizabeth Mitchell, Head of Research and Development, UVA Library Scholars' Lab, Clemons Library

<http://www.ala.org/alcts/events/ac>

Opportunities to Scale

- Expand Social Media Tools section
- Explore how to better support staff and users of traumatic collections
 - Best practices
 - Training
- Create network to support institutions
 - Local/national level
 - SAA's Documenting in Times of Crisis Toolkit
<https://www2.archivists.org/advocacy/documenting-in-times-of-crisis-a-resource-kit>

Credits | Digital Collecting Toolkit

digitalcollecting.lib.virginia.edu/toolkit/credits/

Getting Started uvalibrary Digital Collecting Em... Facebook Login - Box https://vir... Digital Collecting - Un... Dashboard - UVA Libra...

Getting Started
Omeka Classic Setup
Omeka Plugins
Collecting Community Contributions
Custom Omeka Theme
Omeka Site Administration
Social Media Tools
Twitter Setup
Install & Configure Tware
Tware Introductory Lesson
Tware Commands
Additional Resources
About the Toolkit
Credits

This toolkit was a collaborative effort, and made possible in part by a 2018 award from the [Catalyst Fund at LYRASIS](#). We are grateful to everyone who brought their expertise to this project.

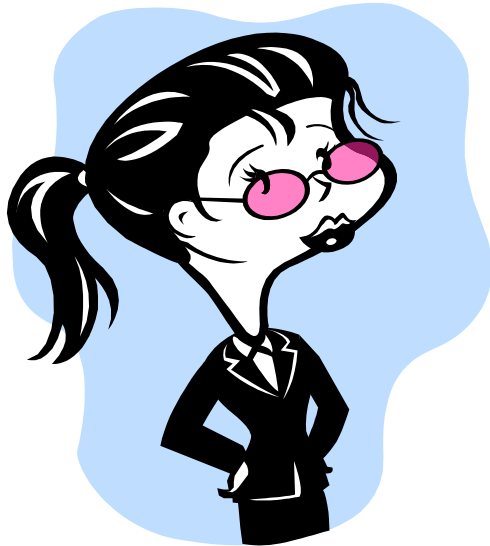
Special thanks to:

- Kara M. McClurken, Director, Preservation Services, UVA Library
- Jeremy Boggs, Head of Research and Development, Scholars' Lab, UVA Library
- Elizabeth A. Mitchell, Community Advocate, Scholars' Lab, UVA Library
- Spalding Lewis, Research Intern, UVA Library
- Lauren Work, Digital Preservation Librarian, UVA Library

Additional Resources from:

- [Omeka](#), developed by the [Roy Rosenzweig Center for History and New Media](#)
- [Documenting the Now](#)
- [UNLV Libraries' Twitter Data Tutorial Series](#)
- GWU Libraries' Social Feed Manager (SFM), [Building Social Media Archives: Collection Development Guidelines](#)
- [An Invitation Towards Social Justice in the Digital Humanities](#)
- Michelle Caswell, ["Toward a Survivor-Centered Approach to Human Rights Archives: Lessons from Community-Based Archives."](#) Archival Science 14: 3-4 (2014): 307-322.
- [Anti-oppression principles compiled by the Center for Story-Based Strategy](#)

Questions?



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digitalcollecting.lib.virginia.edu/toolkit

digitalcollecting.lib.virginia.edu/rally

Digital Collecting for Events and Emergencies:

Survey Analysis:

<https://doi.org/10.18130/v3-8p1n-5w09>

Digital Collecting in Times of Crisis grant report:

<https://doi.org/10.18130/v3-bga3-0027>