*Title:* **PHOTOS Preservation Project Plan DESCRIPTION**

*Abstract:* This document defines the preservation work that will be undertaken by Paul Wilson on the PHOTOS collection of photographs and videos.
**Start Date:**  24Apr2015
**End Date:** 24Jun2015
**Person Days:** 20
**Cost:** Not needed

**Author:** Paul Wilson

**Collection Owner Approval:** Paul Wilson, 20Apr2015

**Sponsor Approval**: Not needed

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# Introduction

## Document Purpose and Scope

This document defines the scope and timescales of a project which will take preservation measures to ensure that the PHOTOS collection stays accessible in the long term and in the face of continually changing technology. The purpose of the document is threefold: first to ensure that, in the course of constructing the document, all necessary activities are identified and planned to produce a successful result; second, to provide the information upon which a decision to proceed or to shelve the preservation project can be taken; and third, to enable the project to get off to a quick start should it be approved.

## Document Ownership and Maintenance

This document is owned and maintained by Paul Wilson

# Project Background and Objectives

## Background

Paul Wilson’s lifetime collection of work documents is managed in a commercial Document Management System which is too expensive to maintain. Therefore, it was decided to define and implement a preservation plan to improve the collection’s potential longevity. However, because the Owner has no experience of Preservation Planning, it was decided to first gain that experience by undertaking Preservation Planning on two much smaller and less complex collections – one of which is the subject of this document (PHOTOS) and the other is a collection of mementos (PERS). The PERS Preservation Planning project has already been completed and its learnings incorporated into this project.

## Objectives

The objectives of this project are to:

* make the PHOTOS collection more accessible and usable in the long term;
* gain experience in the planning and implementation of Digital Preservation activities;
* develop the content and format of documentation needed to support Digital Preservation activities.

# Component scope

## Collection Scope

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| Index | Index to a collection of photos and videos | x |  |  |  | Some changes may be required to the contents – see Data Scope |
| Electronic Files | The electronic files within the PHOTOS collection, which are stored in folders on a laptop. | x |  |  |  | Convert some of the files to preferred formats as defined in work already completed. |
| Physical Albums | The physical photo albums and physical photographs within them, that comprise the physical photo element of the PHOTOS collection |  |  |  | x | Work is currently ongoing to create new slip-in tabs for the albums – but that work is NOT part of this project. |
| Physical DVDs | The physical DVDs that contain the video element of the PHOTOS collection |  |  |  | x | Burn new DVDs of any videos that have had their formats changed |
| Suitcase for Negatives, Slides, and Duplicates  | This is a suitcase, stored in the loft, in which all the negatives, 35mm slides, and duplicate physical photos are stored. |  |  |  | x |  |

## Location Scope

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
| Study | Room at (address), with desk, laptop computer and pedestal unit. |  |  |  | x |  |
| Lounge | A downstairs room at (address), in which the physical photo albums, and the DVDs, reside on a bookcase. |  |  |  | x |  |
| Loft | An area at the top of (address), in which the suitcase containing negatives, slides and duplicate photos, is stored. |  |  |  | x |  |
| Remote locations |  |  | x |  |  | Other locations, yet to be identified, will be required to store off-site backup copies of the digital files |

## Organisation Scope

Not needed – not applicable.

## Process Scope

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
| Accession process | Actions to include new items in the collection |  | x |  |  | The process will be documented and passed for comment to potential future recipients of the collection. |
| Index Sharing process | Actions to take to enable two or more different people to use different parts of the photo index |  | x |  |  | The process will be documented and passed for comment to potential future recipients of the collection. |
| Photo/Video search process | Actions that can be taken to find items within the PHOTOS collection  |  | x |  |  | The process will be documented and passed for comment to potential future recipients of the collection. |
| Backup process | Actions to record copies of the collection in case the originals are lost or destroyed | x |  |  |  | The current process is likely to be changed to store physical backups at remote locations and to periodically test restoration processes. These processes will be documented. |
| Preservation Maintenance process | Actions to periodically check and improve the accessibility of the collection in the mid to long term. |  | x |  |  | This is a new document which will define the preservation maintenance actions to be taken in the future. |

## Data Scope

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
| File Title structure | The structure of the titles of the content files (for example, “0022-06 - Marathon Runners on Dean Lane, Spring1982”) |  |  |  | x |  |
| Index fields | These are the Index fields used to record each of the items in the collection | x |  |  |  | There may be a need to modify this to support the Preservation Maintenance process. |
| Album Spine Titles | This information is placed on title tabs which are placed onto the spine of each physical photo albums  |  |  |  | x |  |
| DVD Spine titles | This information is placed on title tabs which are placed onto the spine of each physical photo album  |  |  |  | x |  |

## Application Scope

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| IamgeFormula DR-2020U CaptureOnTouch | Scanning software used to digitise physical photos |  |  |  | x |  |
| MS Office Picture Manager | Performs basic editing on digital images |  |  |  | x |  |
| DIVX | A free video conversion application |  |  | x |  | This was used to convert some of the original video files in the collection, a few years ago. However it is too large and invasive for the infrequent use I have for it. |
| Yaffmi | A free open source programme that converts between video formats |  | x |  |  | This is a small easy to use portable programme that does not need to be installed – it just requires downloading and unpacking. |
| MS Office | Word, Excel, Powerpoint from MicroSoft |  |  |  | x | Used for the PHOTOS Index and Slip-in tabs template (Excel); and for the templates for album spine labels, DVD case spine labels, and Booth photo placement in an album (Word) |

## Technology Scope

| **Component Name** | **Description** | **Modify** | **Add** | **Remove** | **No change** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
| Laptop | Acer Aspire 4830T Timeline X |  |  |  | x | The masters of PHOTOS digital files reside on the laptop |
| Scanner | Canon Image Formula DR-2020U scanner |  |  |  | x | This is used to digitise physical photos |
| Backup laptop | This is an Acer Aspire 5551 located in another room of the house | x |  |  |  | A backup version of the PHOTOS files will be stored on this machine |
| BT Cloud | Automated backup service |  |  |  | x | A large proportion of the collection is backed up to this cloud service |
| DVDs | Disks on which videos are stored |  |  |  | x | The whole video collection also resides on DVDs |
| Memory Stick or SSD |  |  | x |  |  | This may be required to improve the backup process |
| Standalone Hard Disk |  |  | x |  |  | This may be required to improve the backup process |

# Principles, Assumptions, Constraints and Risks

## Principles

The Principles below have been followed in the construction of this Project Plan, and will be applied throughout the performance of the project:

* Backup, disaster recovery and process continuity arrangements are considered to be significant factors in ensuring the longevity of a collection and will therefore be included as an integral part of this preservation project plan.
* TIF files that already exist in the collection (even those that duplicate JPG files) will be retained because they contain far greater detail than JPG files and may be useful in the future.

## Assumptions

It is assumed that:

* There is no significant advantage for a collection of this type, to convert JPG files (the format which the majority of the 16,000+ files are in), to any other format (such as JPG2000).
* MP4 is the best format to convert video files to in order to give those files the best chance of being accessible and usable in the medium-to-long term.
* If the size of original MOV files are significantly larger than the MP4 files they are converted to, then it is worthwhile retaining the original MOV files as well as the MP4 files because it is possible they contain more detail that may be useful in the future.

## Constraints

This project may be limited by the following constraints:

* The owner does not possess one of the function-rich image editing software tools such as Photoshop (though, for this project, it is not thought one is needed).
* The cost of external storage devices may constrain the type of offline backup that is implemented.
* The large size of a few of the video files, and a desire to limit the cost of cloud storage to its current level, will probably constrain what is backed up in the cloud.
* The owner is in the process of moving house and this may delay the work.

## Risks

There is a risk that:

* Asking for feedback from potential future recipients of the collection, may surface additional requirements which may impact on this project’s plans and timescales.

# Project Governance

## Project Management structure

Not applicable – the collection Owner, Paul Wilson, is also the Sponsor, Project Manager and Project Staff.

## Project Reporting

Since there is only one individual in the overall project organisation there is no need to perform project reporting. However, because this is a test of a Preservation Planning Project, it will be useful to have a record of what takes place, and therefore a Progress Report may be produced on or around Friday afternoons each week. The Progress Report will have 6 headings:

* **Overall Status:** either Red (serious problems), Amber (key decisions needed), Green (OK), Blue (Complete).
* **Achievements this week:** deliverables produced, milestones achieved, tasks completed.
* **Plans not achieved:** Deliverables/milestones/tasks that were planned to be completed but have not been. And the actions necessary to regain the lost ground.
* **Activities next week:** Deliverables/milestones/tasks that will be worked on next week.
* **Key Issues:** status of key issues.
* **Key Risks:** status of key risks.

## Change Control

The baseline for this project will consist of:

* This Preservation Project Plan DESCRIPTION document.
* The Preservation Project Plan CHART document.

Any change to the Baseline will be recorded in a Change Log and the appropriate baseline documents will be updated to reflect the agreed change. Changes to this Preservation Project Plan DESCRIPTION document will be recorded in the Amendment Record at the front of the document.

# Project Milestones and Deliverables

## Project Milestones and approach to achieving them

The key project milestones are listed in the table below.

| **#** | **Milestone** | **Approach to achieving the Milestone** |
| --- | --- | --- |
| 1 | Electronic File conversion completed | All electronic files will be converted to the formats previously already identified in the document ‘Notes on analysis of PHOTOS file formats’. |
| 2 | Folders and files reorganised | The folders defined in the document ‘Notes on pre-plan activities for PHOTOS collection’ will be implemented and the appropriate files placed into them. A check will be made to ensure there are no missing files. Shortcuts and cross references in titles will be checked to ensure they are present and correct where appropriate. |
| 3 | DVDs checked  | The physical DVD collection will be checked to identify any videos that are missing or in the wrong format, and changes made as necessary to rectify the issues. The storage containers and their labelling will also be checked and changed as necessary to ensure they are satisfactory.  |
| 4 | Index revised and integrated into collection | The contents of the Index will be checked and revised as necessary to ensure consistency across its entries and to fill in any missing information. Changes will be made to the way the Index is labelled and stored to ensure that it is less likely that users will overlook its existence. The structure and contents of the Index will also be reviewed and modified as necessary to support the long term preservation of the collection.  |
| 5 | User instructions written and reviewed by potential future owners | Instructions on how to add new material to the collection, and how to find material in the collection, will be written and reviewed and refined in conjunction with the potential future owners. |
| 6 | Backup and DR processes revised | The Backup and DR processes will be revised as necessary to support the long term preservation of the collection. The revised processes will be tested and refined until it is confirmed that they are working successfully. |
| 7 | Preservation Maintenance Plan completed | A Preservation Maintenance Plan will be written and included in the Excel Index as a separate worksheet. Reminders to take action will be included in the appropriate years in the Owner’s calendar. |

## Deliverables

The deliverables listed below will be produced. The approver will be the collection Owner.

1. Updated Electronic Files
2. Reorganised Electronic Folders and Files
3. Updated DVD collection
4. Index revision specification
5. Revised Index document
6. Draft User Instructions
7. Final version of User Instructions
8. Preservation Maintenance Plan
9. Backup and DR process definition and test plan
10. Backup copies of the collection

# Project Plan

## Task Breakdown

| **Task No** | **Task Name** | **Resource (days-initials)** | **Deliverable Produced** | **Start Date** | **End Date** |
| --- | --- | --- | --- | --- | --- |
| 1 | Convert Electronic File Formats |  |  |  |  |
| 1.2 | Convert files identified in ‘Notes’ document | 1 (PW) | A | 24Apr2015 | 26Apr2015 |
| 1.3 | Run Droid and ensure formats are satisfactory | 1 (PW) |  | 27Apr2015 | 27Apr2015 |
| 1.4 | Update Index to ensure format records are correct  | 1 (PW) |  | 28Apr2015 | 28Apr2015 |
| 2 | Re-organise Folders and Files |  |  |  |  |
| 2.1 | Create new folders and move files | 0.5 (PW) | B | 29Apr2015 | 29Apr2015 |
| 2.2 | Check that no files are missing | 1 (PW) |  | 30Apr2015 | 03May2015 |
| 2.3 | Check that all shortcuts and cross refs are correct | 0.5 (PW) |  | 04May2015 | 05May2015 |
| 3 | Check DVDs |  |  |  |  |
| 3.1 | Ensure all videos are on DVDs and in right format | 1 (PW) |  | 16May2015 | 17May2015 |
| 3.2 | Ensure DVD containers and labels are satisfactory | 0.5 (PW) | C | 17May2015 | 17May2015 |
| 4 | Revise Index and integrate it into the collection |  |  |  |  |
| 4.1 | Review Index structure and define changes | 1 (PW) | D | 18May2015 | 19May2015 |
| 4.2 | Modify the Index as defined | 0.5 (PW) |  | 20May2015 | 20May2015 |
| 4.3 | Ensure completeness/consistency of contents | 2 (PW) | E | 21May2015 | 22May2015 |
| 4.4 | Include the Index file in the My Pictures folder | 0.1(PW) |  | 22May2015 | 22May2015 |
| 4.5 | Include cross-referencing in all components | 0.5 (PW) |  | 23May2015 | 24May2015 |
| 5 | Write user instructions |  |  |  |  |
| 5.1 | Create draft user instructions | 1 (PW) | F | 25May2015 | 26May2015 |
| 5.2 | Get feedback on draft instructions from users | 2 (PW) |  | 28May2015 | 07Jun2015 |
| 5.3 | Finalise user instructions | 0.5 (PW) | G | 08Jun2015 | 18Jun2015 |
| 5.4 | Publish user instructions in Index and to users | 0.2 (PW |  | 20Jun2015 | 21Jun2015 |
| 6 | Create Preservation Maintenance Plan |  |  |  |  |
| 6.1 | Define maintenance activities | 0.5 (PW) |  | 08Jun2015 | 12Jun2015 |
| 6.2 | Document Preservation Maintenance Plan | 0.5 (PW) | H | 13Jun2015 | 16Jun2015 |
| 6.3 | Place reminders in calendar for future maintenance activities | 0.1 (PW) |  | 17Jun2015 | 18Jun2015 |
|  7 | Revise the Backup and DR arrangements |  |  |  |  |
| 7.1 | Obtain memory stick(s) or SSD(s) | 0.2 (PW) |  | 28May2015 | 07Jun2015 |
| 7.2 | Review and document Backup and DR arrangements and test plan and include in Index | 1 (PW) | I | 8Jun2015 | 18Jun2015 |
| 7.3 | Ensure BT Cloud is backing up correctly  | 0.2 (PW) |  | 20Jun2015 | 20Jun2015 |
| 7.4 | Test BT Cloud reinstatement process | 0.2 (PW) |  | 20Jun2015 | 20Jun2015 |
| 7.5 | Create updated DVD backup for relevant files | 0.5 (PW) |  | 21Jun2015 | 23Jun2015 |
| 7.6 | Create backup copy on other laptop in house | 1 (PW) |  | 21Jun2015 | 23Jun2015 |
| 7.7 | Test reinstatement from other laptop | 0.2 (PW) |  | 21Jun2015 | 23Jun2015 |
| 7.8 | Create backup on standalone hard disk | 0.3(PW) |  | 21Jun2015 | 23Jun2015 |
| 7.9 | Test reinstatement from hard disk | 0.1 (PW) |  | 21Jun2015 | 23Jun2015 |
| 7.10 | Create backup on memory stick(s) / SSD(s) | 0.2 (PW) |  | 21Jun2015 | 23Jun2015 |
| 7.11 | Test reinstatement from memory stick / SSD | 0.1 (PW) |  | 21Jun2015 | 23Jun2015 |
| 7.12 | Arrange shipment of backups to remote locations | 0.1 (PW) |  | 24Jun2015 | 24Jun2015 |
| 7.13 | Ensure all backups are in place | 0.1 (PW) | J | 24Jun2015 | 24Jun2015 |

## Resource Requirements

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Initials** | **Type/Name of resource** | **Total days** | **Cost** | **From** | **To** |
| PW | Paul Wilson | 20 | n/a | 24Apr2015 | 24Jun2015 |

# Project Budgets and Costs

## Budget

*Not needed – no significant expenditure*

## Estimated Costs

*Not needed – no significant expenditure*