

Data Workflow

Data Management Workshop

ELIZABETH WICKES, DATA CURATOR

RESEARCH DATA SERVICE

Workflow Workshop Goals

- Know
 - the tools you use
 - the stuff you use
 - where it all lives
 - where it all goes
- Learn
 - How your project workflow works
 - Points where you need clarification
 - How your collaboration with others could be improved
- Practice
 - Mapping out your workflow

Required Materials

- 1 color, 3x3 post it notes
- Several colors of smaller post it notes
- Large paper, divided into 3 horizontal sections
- Handout with cheat sheet
- Pen or pencil

Activity: Workflow Map

- This will be our main activity today, so feel free to take your time on these steps and ask questions
- The intention is not to capture every detail of your workflow, but to help you get a feel for the big picture and points where you may need clarification or other help.

Start with your question

- “I study the works of Joe Human. I believe that there is a change in his writing style that corresponds with an affair with a woman named Lucy, whom he marries much later after his first wife dies. **I want to look at his papers in the University of Earthish archives to find evidence of their affair and pinpoint which works he wrote during their courtship.**”
- What do you do first?
 - Find and read through the archive’s finding aid
 - Pinpoint which items, collections, boxes, etc. have what you want
 - Identify areas of uncertainty

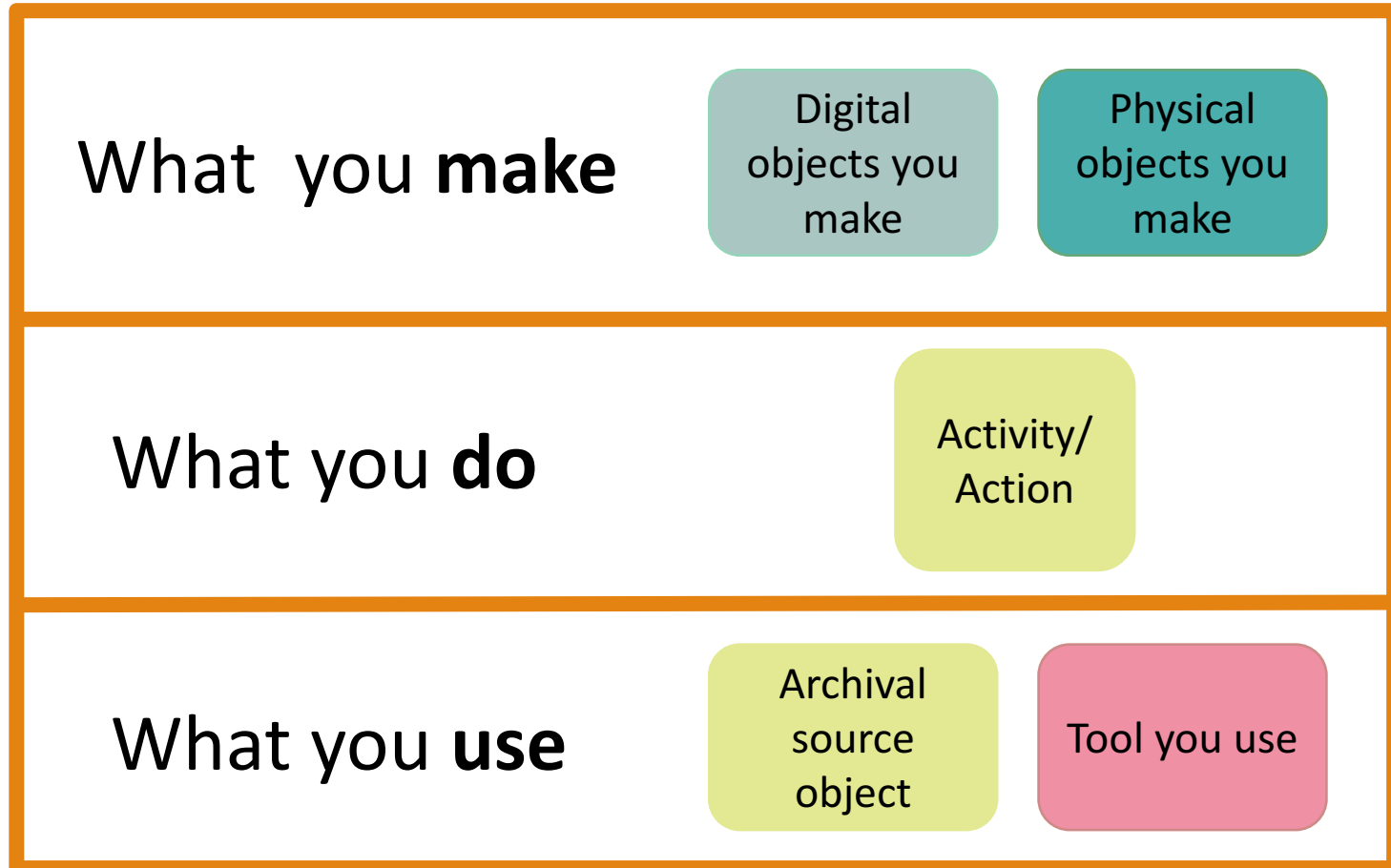
Workflows

- Use a workflow structure to identify:
 - What archival objects you want to get
 - How you'll get evidence from them
 - The tools you'll need
 - **Discover your questions**
- You'll need to do several passes through this as you investigate, formalize, and discover more about your research and the archives.
- You (often) get one chance to dig into the archives and collections, so **you've got to make it count.**
- We're going to go over a framework to help you identify and inventory your research process and needs. **This will be a living document, even after you get to your research site.**

Approaching an initial workflow

- Think about these 3 questions:
 1. What kind of evidence will help answer your research question?
 - Be as specific as possible, but don't be afraid to generalize at this stage.
 2. What will you do?
 - Think action words: read, note, photograph, scan, summarize, converse, interview, etc.
 3. What will you make?
 - These should be nouns: pictures, word files, handwritten notes, PDFs, recordings, etc.

The Board & the Pieces



Make this your own

- You know what you do best
- Use your own voice and words
- Just be sure you'll be able to understand them later

Start with your activities:

lay out about 5-7 big yellow stickies in a row in the center, and write down **what you will do** – action statements please

Read
letters

View
photos

Read
diaries

Review
news
papers

Interview
archivist

Read
letters

View
photos

Read
diaries

Review
news
papers

Interview
archivist



Then think about order, location, etc. Reorder them as necessary. Write down the name of the repository/archive/collection if applicable.

with resources that are **made**

Read
letters

View
photos

Read
diaries

Now think about
each activity note
as a column

and resources that are **used**

Think **first about the archival resources** you'll be using for each activity, and place a **small yellow sticky** in the associated column.

Read
letters

View
photos

Read
diaries

Review
news
papers

Interview
archivist

1891
letters

?

1890's
diary

News-
papers

You may not know the right resource or **there might not be a resource**

Second, use a **small pink sticky** note to note **the tool you use**

Read letters

View photos

Read diaries

Review news papers

Interview archivist

1891 letters

?

1890's diary

News-papers

Flatbed scanner

Archives copy

excel & scanner?

Archives copy

Voice recorder

hi res
images

Finally, use the **light blue** stickies to note any **digital content** you'll be making during that activity

Inventory
of dates

and **dark blue** stickies for any **physical content/objects** you'll make/collect.

Read
letters

View
photos

Read
diaries

Review
news
papers

Interview
archivist

1891
letters

?

1890's
diary

News-
papers

Flatbed
scanner

Archives
copy

excel &
scanner?

Archives
copy

Voice
recorder

hi res
images

??

Use as many as you need.
Okay to repeat!

audio file

dates/ids
in excel

Notes
with IDs

notes

Read
letters

View
photos

Read
diaries

Review
news
papers

Interview
archivist

1891
letters

?

1890's
diary

News-
papers

Flatbed
scanner

Archives
copy

excel &
scanner?

Archives
copy

Voice
recorder

hi res images

??

multipag
ePDFs

audio file

notes

Make a note if you're unsure

dates/ids in excel

Notes with IDs

dates in excel file

Read letters

View photos

Read diaries

Review news papers

Interview archivist

1891 letters

?

1890's diary

News-papers

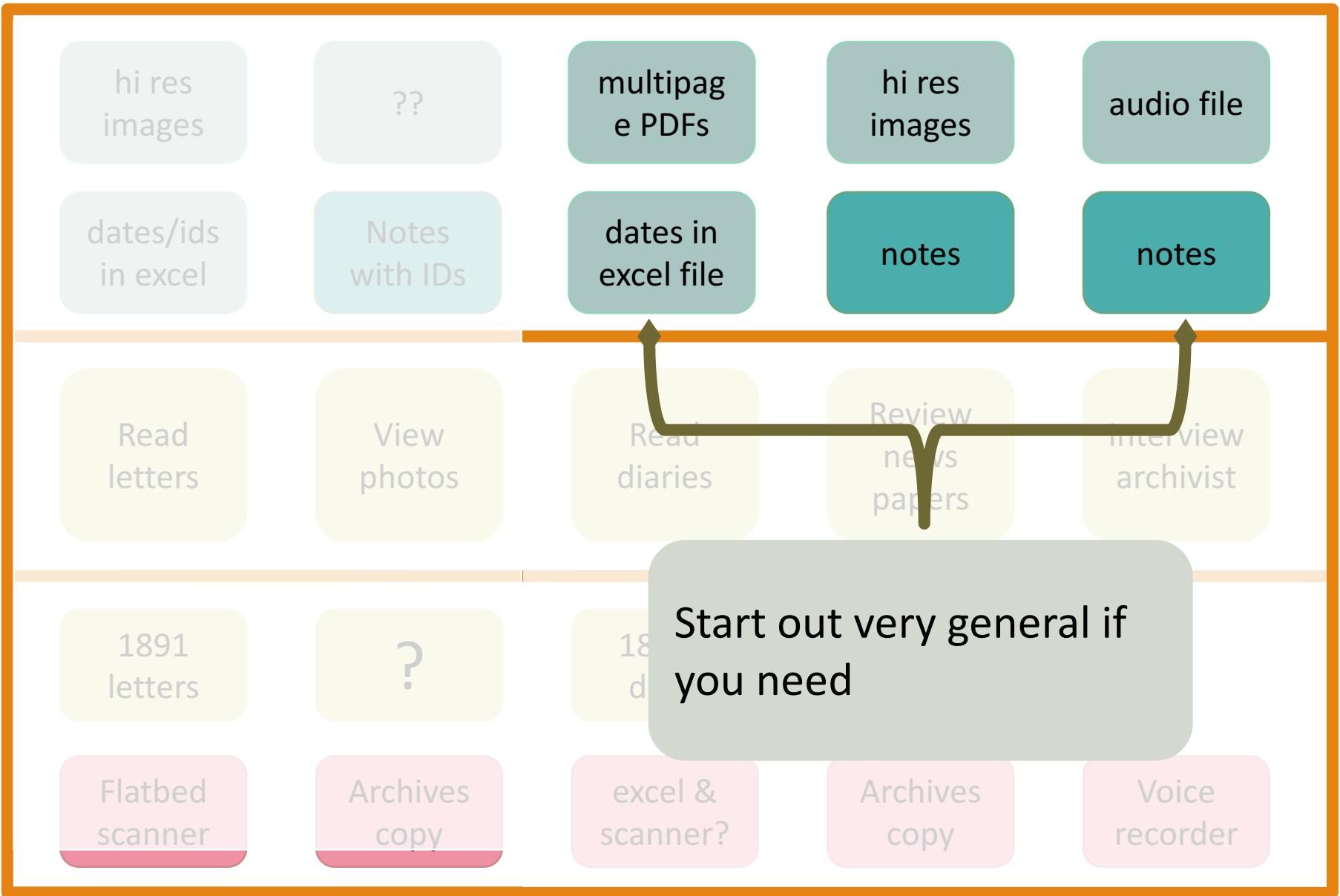
Flatbed scanner

Archives copy

excel & scanner?

Archives copy

Voice recorder



Use the **red sticks** to note any **pain points or questions**

Then add who can help or answer your question.

multipage PDFs

hi res images

audio file

dates in excel file

notes

notes

Would the archives have this?

Read letters

photos

Read diaries

Review newspapers

Interview archivist

1891 letters

Is there copyright?

?

To scan or to note?

1890's diary

News paper

Do I need IRB?

Who has a recorder?

Flatbed scanner

Archives copy

excel & scanner?

Archives copy

Voice recorder

hi res images

??

multipage PDFs

hi res images

audio file

dates/ids in excel

Notes with IDs

dates in excel file

notes

notes

Would the archives have this?

Read letters

View photos

Read diaries

Review newspapers

Interview archivist

1890's letters

Is there copyright?

?

To scan or to note?

1890's diary

News papers

Do I need IRB?

Who has a recorder?

Flatbed scanner

Archives copy

excel & scanner?

Archives copy

Voice recorder

Now take another look

- Are there deadlines you can trace back and add?
- Looking at the stuff that you are making:
 - What folders do you need?
 - Where should those folders be?
 - What should your file names be?
- Looking at the tools you use:
 - What documentation do you need about them to understand your project in a few years or for another person to take it up?
 - Do you need to save/backup the software or scripts to include as a reference in a future project?
- Add annotations to your board to indicate this. Use the back of your worksheet to document the folder structure.