
Attachment 1
QUEENS PUBLIC LIBRARY
Digital Asset Management System - Usage Scenarios

May 13, 2022

INTRODUCTION

Usage scenarios are provided to give narrative summaries of required system functionality and to give prospective vendors a better understanding of QPL's workflows. The scenarios are intended to be generic, as many systems may perform similar processes but use different mechanisms and/or terminology. The scenarios are used to vet a system's ability to accommodate mandatory processes as a whole and not individual functions.

VENDOR INSTRUCTIONS

Please be prepared to demo Usage Scenarios 1, 2, 7 and 8**.**

The following bullet points should be incorporated into your demo to describe how the proposed system will support the selected usage scenarios. Please be prepared to discuss the remaining usage scenarios (3-6), although you will not be required to demo them. *You do not need to respond to this document in writing.*

Offerors are requested to provide the following details for each use case to be demoed during the demonstration meeting:

- **Solution Description**
  Narrative description of how the proposed system could most effectively or optimally fulfill the scenario.

- **System Preconditions**
  Any system preconditions or assumptions that would be required to fulfill the scenario as described, such as configuration by either the vendor or QPL, custom development, or integration with third-party tools.

- **Time Estimate**
  An indication of the time frame associated with implementing the solution.

- **Additional Documentation**
  To help illustrate how the scenario would be fulfilled using the candidate system, **please plan a detailed walkthrough during the demonstration meeting**.

US-01: Batch Asset Management

Objective:	**Actors:**
Efficiently upload assets, edit metadata, and assign permissions in batch.	Graphic Designer Digital Archives Manager

Background:

The Library staff frequently needs to upload multiple assets simultaneously and the current process is difficult and time consuming. They would also like to batch edit metadata, permissions, and access controls on upload as well as on existing assets.

Narrative:

A Graphic Designer uploads a folder from their desktop containing several hundred photos in TIF format from a library-hosted event. They batch import basic metadata such as event name, date, event description, and location. After uploading, they then choose a sub-set of ten of these images ("selects") for use in an email recapping the event for social media and place them in a collection (or lightbox, or similar temporary "holding area"). They also set access permissions for the Digital Archives Manager, who is also a user of the system, to search, view, and download as appropriate. The rest of the images that were not selected will only be visible to the Marketing Department. None of the assets will be made available for public access.
Later, the Archives Manager will batch edit metadata if necessary.

US-02: Video Asset Management

Objective:	**Actors:**
Manage and provide access to audiovisual assets and the in-system editing and/or display of associated transcripts as subtitles.	Content Partner Digital Archives Manager

Background:

The Digital Archives department is in a partnership with another institution to collect oral histories from the community. The department is responsible for the preservation and (restricted or public access) presentation of the videos. The Content Partner at the partner institution creates oral history videos in Zoom creating an MP4, edits transcripts, and collects associated assets (JPGs, for example) they will upload into the DAM.

Narrative:

A Content Partner from another institution is collecting oral histories from members of the community by recording Zoom meetings. When the interview is over, they upload the Zoom MP4 video to the DAM, where the file will be securely stored. A transcript is created separately by the Digital Archives Manager outside of the system and attached to the video. At this point, the Digital Archives Manager may set privacy and request settings that will require a researcher to request access to view an asset. They will then publish the video to a branded public-facing portal (served from the DAM) and the transcript will display as subtitles when the video is played. Configurable embed options and visible usage rights information enable public users to appropriately reuse the asset. Content related to the topic of the oral history, such as photographs or documents, should be logically related to the video so users can easily see all associated assets.

Variant:

- The Zoom audio is automatically transcribed upon upload, and the Digital Archives Manager will verify and/or edit the transcription within the DAM.
- The system will carry a queryable status (e.g., "Ready for Transcription, Publicly Available") to support processing workflows.

US-03: Indexing and Asset retrieval

Objective:

Select metadata from the DAM is indexed within the Library's SOLR index so assets can be located in a single site-wide search and taken directly to the record in the DAM.

Actors:

Digital Archives Manager
Systems Engineer
Researcher

Background:

The Library cannot provide as broad access to its digital collections as it can for other Library collections (such as the Library catalog). Currently, the metadata from many Library-owned and -managed databases are indexed using SOLR so patrons can perform a single search on the Library's homepage, get results from all indexed systems, and click a link to be taken directly to the record in the database that contains the information they are looking for.

Narrative:

The Digital Archives Manager marks a subset of DAM assets to be discoverable via the Digital Asset Management system's API for retrieval on the main Library site. A Systems Engineer uses SOLR to crawl the DAM using the DAM's API to create an index of the assets. This index is searchable from the public-facing Library site, and the search results contain thumbnails, links, and metadata retrieved from the DAM. When a Researcher finds a Digital Archives record in the search results, they click on a permanent link that takes them directly to the publicly accessible record in the DAM.

US-04: Public Request for Existing Asset

Objective:	**Actors:**
Provide downloads of derivative assets on demand.	Researcher

Background:

Members of the public currently request images from the Digital Archives website. The request is forwarded via email and then manually routed to the appropriate department for the resolution of the request.

Narrative:

A Researcher, using faceted search to filter and refine results, finds an image in the public portal of the DAM they would like to use for personal use. Rights and usage information are displayed as metadata alongside the image in the detail view in the portal. If the asset is restricted, the Researcher can only view the asset in the DAM. If the asset is available, the Researcher will click on a download button or a link (or similar) and upon download, are offered several image sizes and formats to choose from. For example, the Researcher can choose between JPG and the original-sized TIF. The Researcher selects the JPG, and the DAM either creates the derivative on the fly or the Researcher selects an existing derivative created on upload by the DAM [vendor: please clarify which in your response]. The Researcher downloads the JPG to their local device.

Variant:

- The system uses IIIF-compliant image processing for cropping and resizing.
- The Researcher decides they would like to purchase a print of their selected image. They click a button (or similar) that takes them to a store interface where they can select additional options and checkout with a credit card.
- The rights information is embedded in the image file's XMP on download.
- Digitized books will be viewable in a "book reader" in the DAM.

US-05: Public Request for Asset Creation

Objective:	**Actors:**
Manage the workflow for providing downloads of derivative assets on demand.	Researcher Archivist Digital Archives Manager

Background:

Members of the public currently request reproductions of images and other materials they find while doing research in person in the Archives Reading Room. The physical materials are then manually routed to the appropriate department for the resolution of the request (e.g., digitization and distribution).

Narrative:

A Researcher sees a physical/analog photograph in the Archives Reading Room that they would like to have digitized for personal use. Rights and usage information are confirmed by the Archivist who then creates a ticket in the DAM for the Digital Archives Manager to fulfill. The item(s) are tagged with a unique job number and sent to be digitized. Meanwhile, the Archivist enters the Researcher's name and delivery method information into the DAM so that once the digital assets have been created, the Digital Archives team knows where to send them. There is space in the job ticket for the Archivist to provide item-level metadata for the items being scanned so that they can be added to the DAM for public display on the Library's web portal. The Archivist can also enter the Researcher's format preference and notes about their use, if relevant to the document.

Once the item has been digitized, the Digital Archivist will send a link to the Researcher that they can use to download the asset and then update the ticket to indicate that the request has been fulfilled.

US-06: Preservation Functions

Objective:	**Actors:**
Ensure the Library's digital assets — particularly born-digital assets — are securely stored and remain accessible over time.	Digital Archives Manager

Background:

The Library has formal agreements with other organizations to preserve oral histories and related materials for the long term. Additionally, the Library has tens of thousands of digitized and born-digital assets in its care. The Library needs to ensure the assets remain authentic, readable, and accessible over the lifetime of the assets, which may be indefinite.

Narrative:

The Digital Archives Manager uploads a folder containing archival scans of photos in the TIF format. Immediately upon ingest, the files are automatically characterized, checksums (e.g., MD5, SHA-1) are created, and embedded (e.g., IPTC, XMP) metadata is extracted. The files (and all other files and metadata in the system) are automatically backed up at least twice, and ideally three times in geographically distinct locations (e.g., East Coast US, West Coast US, on-prem in NYC). If any file is discovered to have changed without user intervention, the system will notify the Digital Archives Manager and restore the corrupted file. Additionally, there is an option to run fixity checks manually on all, or a subset, of the assets.

The backup storage location may be on-premises, cloud-based, or a hybrid.

Variant:

- The system replicates to a third storage location
- Formats are monitored for obsolescence

US-07: Multiple metadata schemas and views

Objective:	**Actors:**
Enabling multiple sets of metadata fields in different schemas based on department.	Director of Marketing Graphic Designer

Background:

The Digital Archives and Marketing departments of the Library have different workflows and metadata requirements for asset management. Their description needs are very distinct. For example, one department uses the standard VRA Core to describe visual assets; the other department has a bespoke set of metadata fields.

Narrative:

The Digital Archives Manager uploads several scans of maps or photos in TIF format to the DAM. The user interface allows the uploader to select a metadata schema (e.g., MARC for maps or VRA Core for photos) with options and metadata fields that are highly relevant to the asset type so that the Manager can efficiently apply metadata to their assets.

In the same system, the Graphic Designer uploads Adobe InDesign files for a project. The user interface and bespoke metadata schema for the Marketing Project Files asset type are tailored to support their workflow so that they can be easily found and reused by other Marketing staff members.

US-08: Institutional Archive Pipeline

Objective:	**Actors:**
Provide workflow for capturing institutional history.	Public Service Librarian Marketing Manager Photo and Video Content Producer Digital Archives Manager

Background:

Members of the QPL staff working in public service roles often host events and conduct activities at their branches that the library would like to capture for its own institutional history. Staff currently email photos to Marketing with ad hoc descriptions. There is no formal process for this activity and often photos are not shared at all.

Narrative:

A Public Service Librarian hosts an event with a local elected official and captures photos of the event. They then upload the photos (in JPG, PNG, or HEIC formats) to a public submissions portal in the DAM that is accessible to QPL staff. In the portal, they are asked to add metadata about the photos, including rights information, as well as upload PDFs of photo releases signed by participants. The DAM notifies the Marketing Manager and the Digital Archives Manager that new images have been added and can choose to ingest them for future use in Marketing Materials or the Digital Archives Collections. The Public Service Librarian's contact information is attached to the upload so that they can be reached for additional information if needed. Upon ingest as a Digital Archives asset, HEIC images will be converted to TIF. The release forms are processed with OCR to make the full-text searchable.