

Digitizing Day Handbook

A Planning Guide for Local Communities



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For more information, visit

<http://openarchives.umb.edu>

<http://blogs.umb.edu/archives/mass-memories>

or email

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This handbook was developed by the University Archives & Special Collections Department in the Joseph P. Healey Library at UMass Boston for the New Bedford Fishing Heritage Center as part of "Salted, Pickled and Smoked: Preserving and Presenting the Cultural Heritage of New Bedford's Fishing Community," a project funded by a Common Heritage Grant from the National Endowment for the Humanities. Any views, findings, conclusions, or recommendations expressed in this handbook do not necessarily represent those of the National Endowment for the Humanities.



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ABOUT THIS HANDBOOK

Salted, Pickled, or Smoked: Preserving & Presenting the Cultural Heritage of the New Bedford/Fairhaven Fishing Community was a year-long effort to digitize the cultural heritage of New Bedford's fishing community. The project was a collaboration involving the New Bedford Fishing Heritage Center, University Archives and Special Collections at the University of Massachusetts Boston, Clair T. Carney Library at the University of Massachusetts, Dartmouth, MIT Sea Grant, the New Bedford Free Public Library, and New Bedford Whaling National Historical Park. Funding for this project was provided through a Common Heritage Grant from the [National Endowment for the Humanities](#). The project centered around a day-long digitizing event. Anyone with a connection to the local fishing community was invited to participate, and the day was spent scanning photographs and documents, collecting stories, and photographing artifacts.

A Digitizing Day is an event where individuals with a shared past or culture—whether through common experiences, communities, or other connections—come together to contribute photographs and documents that are scanned and collected. The event is typically held in a public space, generally a local public library, historical society or community center.

This [Digitizing Day Handbook](#) is intended to serve as a guide for community groups to organize such events. The suggested training and planning procedures provided here are based on the Mass. Memories Road Show staff's nearly 15 years' experience with managing these types of events. The Mass. Memories Road Show model is outlined in greater detail in another publication, the [Mass. Memories Road Show Project Handbook](#).

ABOUT THE MASS. MEMORIES ROAD SHOW

The Mass. Memories Road Show (MMRS) at UMass Boston is an event-based public history project that digitizes family photos and stories shared by the people of Massachusetts. We do this by working with local communities to organize free public events where residents are invited to bring up to three family photos to be scanned and included in the archives at UMass Boston and online at <http://openarchives.umb.edu>. Contributors can also share “the story behind the photos” on video, have their own “keepsake photo” taken, and receive advice from professional archivists and historians on dating and caring for their family photos.

The MMRS is about more than documenting history. An important goal of the project is to bring together local residents of all ages, ethnicities, races and backgrounds in lively and thoughtfully planned public events that celebrate each person's family history and contribution to the community—whether they have lived there for generations or are recently arrived. We hope that both the events and the resulting digital archive will help build and strengthen connections within the communities of Massachusetts.

The MMRS is produced by the University Archives & Special Collections Department at the Joseph P. Healey Library, UMass Boston and cosponsored by the Patricia C. Flaherty '81 Endowed Fund.

HISTORY OF THE MASS. MEMORIES ROAD SHOW

Launched in 2004, the MMRS grew out of the place-based education initiatives of UMass Boston's “Massachusetts Studies Project” (MSP), which provides resources for Massachusetts teachers and students in the areas of local history, culture and environmental studies. A series of conversations with librarians, MSP board members, teachers and local historians coalesced in a vision of a public history project inspired by elements of PBS's Antiques Roadshow (people bringing their personal

treasures to a local event for professional perusal) and the Library of Congress' American Memory Project (a library organizing digitized images from a common heritage to be shared on the internet).

The MMRS was designed to meet two goals: collecting digital surrogates and personal annotations of locally held primary sources that document people, places and events in Massachusetts; and developing a searchable online repository of sources that could be used for educational purposes at all levels. As the project developed, we discovered that it met another important need that has been incorporated as a key goal of the project: community building. Road Shows have turned out to be deeply engaging community events that connect people within the community to each other and to others throughout the state, and have proven to be meaningful in lasting ways to the people who contribute and to those who volunteer.

PLANNING A DIGITIZING DAY

A successful Digitizing Day benefits from thoughtful planning and collaboration between a planning team that coordinates event logistics and publicity and a technical team that oversees the work of collecting and processing images and written documentation.

PLANNING TEAM RESPONSIBILITIES

The planning team works to plan and organize a well-attended event. The planning team may include interested individuals and representatives from a number of local groups, including public libraries, historical societies, public schools, cultural and ethnic organizations, youth groups, historic preservation organizations, businesses, government officials, genealogists, senior citizens and others. Many of the team members may be particularly interested in local history, family history and/or photography. . . but it also helps to include planning team members who have skills in public relations, writing, television production, event organization, translation, community outreach and fundraising.

Planning team responsibilities include:

- Select a date and location for the event.
- Arrange any necessary parking, transportation, signage, translation, non-technical equipment and rentals for the event.
- Provide lunch (or dinner) for volunteers and staff at the event.
- Create, print and distribute any necessary press releases, flyers, postcards, videos, letters or other outreach material about the event.
- Recruit contributors to attend the event.
- Provide 15-20 volunteers to help staff the event.
- Supply photocopies of Registration and Photo Forms at the event.

A Note about Recruiting Contributors: Recruiting contributors includes printing and distributing flyers, posters, press releases, etc. **and making lots of phone calls!** We have learned that personal invitations via telephone or email are the most effective ways to recruit contributors to bring their photos to the Digitizing Day.

For more information about planning events like these, please see the [Mass. Memories Road Show Project Handbook](#).

PLANNING TEAM DIRECTOR RESPONSIBILITIES

The Planning Team Director is responsible for managing the event planning. This involves recruiting planning team members, running planning meetings, managing outreach for the event, and serving as a liaison with the technical team. It also involves writing press releases, appearing on local television or radio, speaking at organization meetings and making lots of phone calls. . . or managing the planning committee members who carry out those tasks.

TECHNICAL TEAM RESPONSIBILITIES

The technical team consists of people who have organized a Digitizing Day in the past, and provides the planning support, project expertise and technical equipment for the event.

Before the event, the technical team develops a floor plan, provides all the necessary paperwork originals and station signage for the event, and manages the participation of experienced volunteers for each event. Prior to the event, the technical team holds a training session for all volunteers, sets up for the event, and manages the event.

After the event, the technical team processes the photos and data, and/or ensures the permanent inclusion of the digital records in a digital repository that is harvested by the Digital Commonwealth or other Digital Public Library of America (DPLA) content hub.

Drawing on the experience gained through the Mass. Memories Road Show, the University Archives & Special Collections (UASC) team occasionally collaborates with community partners to organize Digitizing Days for collecting images and stories related to a particular topic, region, or event. Please contact library.archives@umb.edu for information about UMass Boston's support services.

TECHNICAL TEAM DIRECTOR RESPONSIBILITIES

The Technical Team Director is responsible for managing the stations on the day of the event. This involves training staff and volunteers, setting up equipment, and managing the collection of photographs and related documentation at the event.

WHAT TO EXPECT ON THE EVENT DAY

At the event, contributors will be guided through a series of stations.

1. Once on site, they will be asked to complete a Registration Form with their contact information and sign a release giving the event organizers non-exclusive permission to include scans of their materials in a designated digital repository, and a Photo/Document Form for each photo or document, providing information about the photos or documents.
2. From there, contributors will then be asked to complete a Photo/Document Form with information about each photo they brought with them. Volunteers will assist contributors in selecting photos or documents and/or completing their paperwork, if needed.
3. The photos will be scanned onsite, and the originals immediately returned to their owners. Contributors will also receive a USB flash drive with their digital files.
- 4.

Prior to the event, contributors should go through their personal photograph collections and select the photographs that they would like to share and preserve online.

Contributors should bring their original photos to the event. For example, if the photo is a print, then the contributor should bring the original print if at all possible, rather than a photocopy. If the photo was “born digital” (i.e. taken with a digital camera), then the contributor should bring the photo on a CD, USB drive, or cell phone.

People usually spend at least 30-45 minutes at an event. Although it doesn't take long to scan photographs, we find that people often take some time to complete their paperwork and usually like to linger and look at photos that other contributors have brought.

EVENT STATIONS



WELCOME STATION

Contributors complete a Registration Form and receive a numbered nametag.



INFORMATION STATION(S)

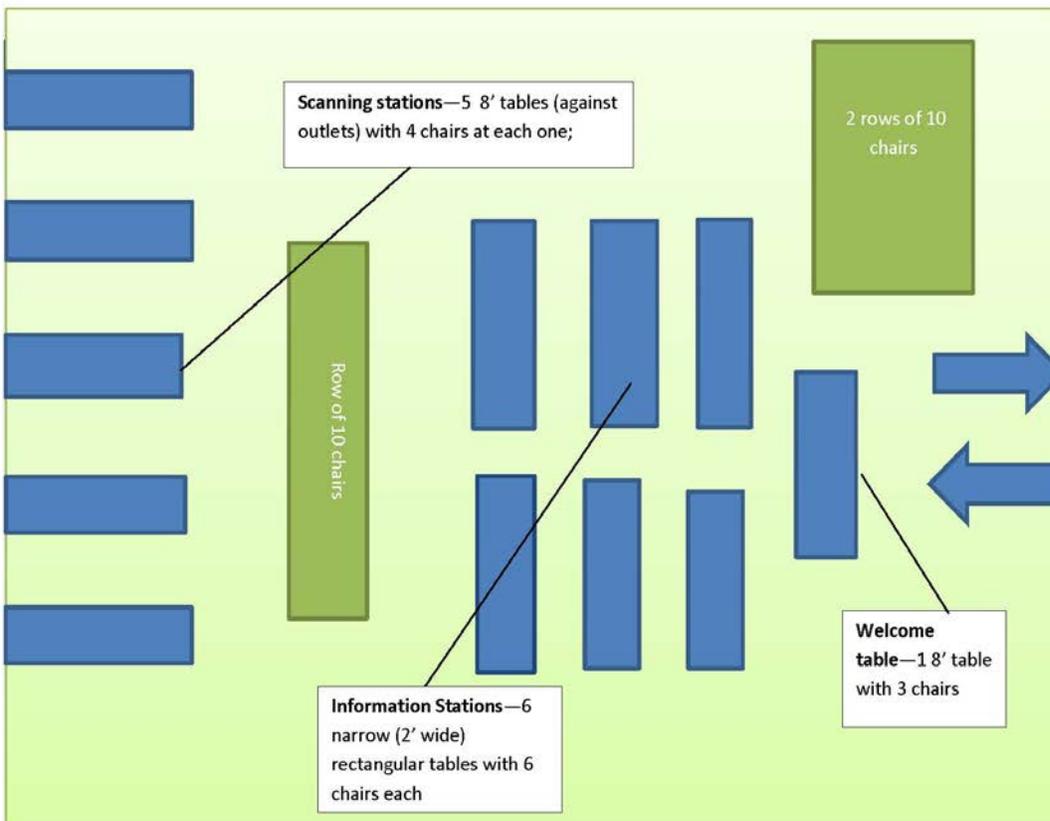
Contributors complete a Photo Form for each photo they bring. Volunteers and Roadies assist in completing the forms.



SCANNING STATION(S)

Contributor photos are scanned and immediately returned to them. During scanning, photos are projected onto a screen for other attendees to view and enjoy.

SAMPLE ROOM LAYOUT



Depending on the nature and goals of your event and your resources, other stations you may wish to include are: oral history station to record audio or video taped interviews with contributors; artifact station to photograph and collect information on objects that contributors may bring; and preservation station to provide information about best practices for storing photographs and documents. The Mass. Memories Road Show usually includes four additional stations (video, keepsake, local history, and preservation.) These are described in detail in the [Mass. Memories Road Show Handbook](#).

EVENT STAFFING

Each event is staffed by a combination of new and experienced volunteers who have assisted at Digitizing Days in the past. New volunteers may be members of the planning team or others in the community.

Events are usually staffed with a team of volunteers who are comfortable working with the public in a cheerful yet somewhat chaotic atmosphere. They should be excited about the project mission, interested in local history, photographs and family stories and able to be supportive, engaged and respectful of all contributors and fellow volunteers. These volunteers should be trained prior to the event by the technical team.

Volunteer roles and responsibilities include:

WELCOME STATION

- **2-3 Greeters:** Greet contributors, explain event, distribute nametags and Registration Forms.

Traits of a good greeter: outgoing, friendly, willing and able to answer questions about the event, ready to encourage folks to participate in the project and detail-oriented to manage nametags & Registration Forms. At least one of the greeters should be someone that contributors are likely to recognize and who knows his/her way around the venue.

USHERS

- **2-4 Ushers:** Assist any visitors who need help moving from station to station, provide back-up, listen to stories, enjoy photos and be friendly!

Traits of a good usher: friendly, outgoing, able to engage contributors in the event and escort them from station to station, provide back-up, if needed. Ushers should be familiar with the venue.

INFORMATION STATION

- **10+ Reviewers:** Help contributors select photos, complete & review Photo/Document Forms.

Traits of a good reviewer: good listener, interested in contributors' stories, able to ask leading but not intrusive questions to draw out contributors' stories, familiar with how to safely handle old photographs, able to help contributors select 2-3 photographs from among a larger selection, detail-oriented about ensuring Photo Forms are complete and able to seek assistance from event staff for unusual contributions. Some of the reviewers should be familiar with significant local sites and events. It is extremely important that Reviewers attend a training session before the event.

SCANNING STATIONS (2-6 Scanning Stations)

- **1 Scanner per station:** Handles data entry and scanning.

Traits of a good scanner: experience using a scanner, scanning software and cropping/renaming/saving files to a PC computer. (Specific training will be provided.)

- **1 Reviewer per station:** Manages paperwork.

Traits of a good reviewer: detail-oriented about managing paperwork and insuring Photo Forms are complete.

EQUIPMENT NEEDED

For Welcome Station:

- One 4-6' table and 2-3 chairs for staff
- Numbered stick-on nametags for contributors
- Copies of Registration Forms
- Clipboards
- Pens
- Station sign and easel

For Info Station:

- At least five 6-8' tables and 20-30 chairs for staff and contributors
- Photo Forms
- Clipboards
- Pens
- Station sign and easel

For EACH of 4-5 Scanning Stations:

- Laptop computer
- Scanner and necessary drivers to connect scanners to laptops
- LCD projector
- Portable projection screen (or other material to project onto)
- Paperclips
- Portable USB drive
- One 6-8' tables and 4 chairs for staff and contributors
- Station sign and table-top easel

Other:

- Table and chairs for refreshments
- Table, chairs and area for volunteers to have lunch
- Extension cords
- Nametags for staff
- Training material

RECOMMENDED TECHNIQUES AND TECHNOLOGIES from the MMRS

Numbering system. We use a numbering system based on each contributor's unique Registration and Nametag number. Each photograph or document is numbered by Event #.Contributor #.Photograph #. So, for example, the third photo of the fifteenth contributor at the second event event would be: 21.15.3.

Scanners. Our scanners are CanoScan 9000, with a 8.5"x 11.7" flatbed. They are lightweight, portable, and inexpensive.

Scanner driver software. Scanner driver software needs to be downloaded and installed on each laptop used at the event. Driver software can either be installed through software provided by the scanner manufacturer or through the scanner manufacturer's website.

Scanning software. We use IrfanView scanning software because it is free and is compatible with any number of scanners. To download and install IrfanView, go to http://www.irfanview.com/main_download_engl.htm

- *Note: Irfanview is most compatible with a PC, rather than a Mac. For information about installing and using Irfanview on a Mac, see the FAQ section on <http://www.irfanview.com/>.*

Scanning protocols.

--We scan at 300 dpi because it provides a baseline of quality and is conducive time-wise to an event with a large crowd.

--We save image files as tiffs because this is an archival best practice for digital preservation.

Projectors. We use projectors at each Scanning Station to allow all event contributors to see the images that contributors are having scanned in real time.

AFTER THE EVENT

The post-production process can be time-consuming, and may take up to three months. The technical team will notify you once the photos are available online.

For researchers who do not have access to the internet at home, local public libraries have computers with internet access available for public use.

FOR MORE INFORMATION

Open Archives: Digital Collection (Mass. Memories Road Show)

Digital collection of photos and videos collected at past Mass. Memories Road Shows

<http://openarchives.umb.edu>

Open Archives: Digital Collections (Community-Based Collecting Projects)

Digital collection of photos collected at Community-Based Collecting Projects

<http://openarchives.umb.edu>

Mass. Memories Road Show Project Handbook

<http://openarchives.umb.edu/cdm/singleitem/collection/p15774coll6/id/1327/rec/1>

APPENDIX I: SAMPLE EVENT PAPERWORK

Registration Form

REGISTRATION FORM

Event#: _1_ Nametag #: _____

Last Name: _____ First Name: _____ MI: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ E-mail: _____

What is your connection to New Bedford's fishing heritage?

May we contact you for a home visit to learn more about your stories? _____

How did you hear about this event? _____

Thank you for sharing your stories and materials with the New Bedford Fishing Heritage Center! With your help, we are creating an online educational resource that will reflect the histories, strengths and diversity of the rich fishing heritage in New Bedford. To build this publicly accessible resource, it is important that we be able to use the images and text we gather without having to negotiate permissions with each contributor. Please read and sign the agreement below, which allows us to use your contributions in a variety of ways, at the same time protecting your ownership and publication rights to the photos.

MEDIA RELEASE

I do hereby give the New Bedford Fishing Heritage Center and its partners—including the University of Massachusetts Boston, the University of Massachusetts Dartmouth, and the New Bedford Free Public Library—and their assigns, licensees, and legal representatives the irrevocable right to use my name, image and voice in all forms and media including audio and/or video recordings and in all manners, including composite representations, and advertising and other lawful purposes, and I waive any right to inspect or approve the finished product including written copy, that may be created in connection therewith.

NON-EXCLUSIVE PERMISSION

I hereby grant permission to the New Bedford Fishing Heritage Center and its partners—including the University of Massachusetts Boston, the University of Massachusetts Dartmouth, and the New Bedford Free Public Library—and their assigns, licensees, and legal representatives to copy, display and distribute copies of the scanned documents identified by the Nametag# on this sheet, and to incorporate the scanned images in whole or in part into derivative works, and to subject all collected materials to digital preservation efforts, including but not limited to, creating multiple copies and storing them in publically available storage systems. I retain all other rights to these photos, including without limitation, the right to copy, distribute, publish, display or modify the images, and to transfer, assign or grant license of any such rights.

I am of full age. I have read this release and am fully familiar with its contents.

Signed: _____
(Parent or guardian must sign if contributor is under 18 years of age.)

Thank you for your contribution to New Bedford's fishing heritage!

Greeter initials: _____

Photo Form

PHOTO FORM

PHOTO ID #: 1 ._____._____._____.TIF (for staff use)

CONTRIBUTOR NAME: _____

Give this photo a TITLE:		
WHERE was this photo taken?	Neighborhood: _____ Town/City: _____ State: _____ Country: _____	<i>I don't know</i> <input type="checkbox"/>
WHEN was this photo taken?	Year: _____ Month: _____ Day: _____	<i>I don't know</i> <input type="checkbox"/>
Name the PEOPLE <i>in this photo:</i> <small>List from back to front, left to right. Please use complete names.</small>	1. _____ 2. _____ 3. _____ 4. _____	<i>I don't know</i> <input type="checkbox"/>
Please DESCRIBE <i>this photo and let us know why it is important to you:</i>		
<i>Is there anything about this photo that you would like to know more about?</i>		

Reviewer #1 Initials: _____ Reviewer #2 Initials: _____ Event #: 1 (Salted, Pickled, Smoked 5/21/16)

APPENDIX II: SAMPLE STAFF STATION INSTRUCTIONS

We laminate these instructions and provide a copy at each station. The sample staff station instructions here are templates and information may need to be updated on various instruction forms depending on decisions made by the planning and technical teams. For example, the email address information on the *Digital Station Instructions: Procedures for Image Collector* will need to be updated to reflect the local contact.

Welcome Station Staff Instructions

Roles:

Greeters (2):

Greet contributors, explain event, manage Nametags and Registration Forms.

Supplies:

Registration Forms
Numbered Nametags
Clipboards, Pens/pencils
Event Stations Flyer

1. **Greet** with: "Welcome!"
2. Ask contributor to **complete the Registration Form.**
3. **Review Registration Form & Sign your initials** at bottom.
4. **Give contributor a numbered Nametag** and ask them to write their name on it.
5. **Write the Nametag #** on contributor's Registration Form.
6. Ask how they learned about the event and record.
7. Briefly explain the stations of the Road Show and **invite them to proceed to the Information Station.** If they need any assistance or look lost, find an Usher to assist them.
8. At the end of the day, put all Registration Forms in the envelope provided and return to event staff.

Information Station Staff Instructions

Roles:

Reviewers (5-10):

Supplies:

Photo Forms
Clipboards
Pens/pencils

1. Ask contributors to **complete a Photo/Document Form for EACH photograph or document**. If they have several photos, help them **select three** to be scanned.
2. **Review Photo/Document Form** to make sure it is as complete, legible and thorough as possible. If necessary, sit down with the contributor and ask more questions to fill out the form more completely.
3. **Record Nametag # and Photo ID #** on Photo Form in format: RoadShow#.Nametag#.Photo#.tif
4. **Sign your initials** at bottom of Photo Form.
5. **Invite the contributor to proceed to Scanning Station** with Photo Forms and photographs. If the Scanning Station is very busy, the contributor can proceed to another station first.
6. If any contributors need assistance or guidance, find an Usher to **assist or escort them**.

Usher Staff Instructions

Your role is to make sure everything goes smoothly for contributors!

- **Familiarize yourself with all stations** and locations of restrooms, telephones, refreshments, etc.
- If anyone looks lost or confused, **offer assistance.**
- **Escort contributors from station to station**, if needed.
- If there is a line at one station, **encourage contributors to proceed to another station.**
- **Be available to fill in at stations**, as needed.
- **Be friendly!** Ask contributors to show you their photos, tell you the stories behind their photos and share their memories.
- **If there are any problems, notify event staff.**

Scanning Station Staff Instructions

Roles

- **Scanner (1 per station):**
Scan, crop and number scanned images
- **Reviewer (1 per station):**
Manage paperwork.

Supplies

- Laptop computer
- Scanner
- LCD projector
- Paper clips

Procedures for Reviewer

1. Take Photo Forms from contributor and **hand the first photo to Scanner.**
2. **Record Nametag # and Photo ID #** on Photo Form & sign your initials at the bottom.
3. After scanning, **return photo** to contributor.
4. **Repeat** with each photo.
5. **Paperclip all of the contributor's Photo Forms** together and put in folder.
6. **Invite contributor to proceed to another station.** If the contributor needs assistance, find an Usher.
7. At the end of the day, put all Photo Forms in folder and return to event staff.

Scanning Station Staff Instructions

Procedures for Scanner

Setup

1. Start with laptop OFF and Scanner OFF.
2. Unlock scanner (button on bottom of scanner).
3. Connect scanner lid to scanner body (short, black, attached cable).
4. Plug in electricity to power strip.
5. Plug in USB cable from scanner to laptop.
6. Boot up laptop.
7. Switch scanner ON.
8. On the laptop, open IrfanView by clicking on its icon.
9. In IrfanView, check that proper scanner is connected by choosing FILE / Select TWAIN source and selecting the scanner model being used (e.g. “CanoScan”).

Scanning

1. Open the scanning software: FILE / ACQUIRE / BATCH SCANNING.
2. Click the radio button to choose “Single image.” ScanGear software should appear.
3. Place photo on the platen and close the cover. Be sure to place photo in the proper corner of the platen to avoid having to rotate the image after scanning.
4. Select Source (color photo, newspaper, magazine).
5. Click “Preview.”
6. Crop if necessary. Leave all photo edges visible! If in doubt, don't crop.
7. Click “Scan.”
8. Save image file to folder: MyDocuments/*EventName*/ScannedImages
9. Consult Photo Form to name the file, using format: Event#.Nametag#.Photo#.TIF (See sample form attached)
10. Return original photo to contributor.
11. Repeat with other photos.

At the End of the Day

1. Turn off scanner and laptop.
2. Remove all cables.
3. LOCK the scanner (button on bottom of scanner).
4. Copy all scanned photos to CD(s), place in folder and return to event staff.

Digital Station Staff Instructions

Roles

- **Image Collector (1 per station):**
Scan, crop and number scanned images
- **Reviewer (1 per station):**
Manage paperwork.

Supplies

- Laptop computer
- LCD projector
- Paper clips

Procedures for Reviewer

1. Take Photo Forms from contributor and **hand the first photo source (USB drive or CD) to Image Collector.**
2. **Record Nametag # and Photo ID #** on Photo Form & sign your initials at the bottom.
3. After image copying, **return photo** source to contributor.
4. **Repeat** with each photo.
5. **Paperclip all of the contributor's Photo Forms** together and put in folder.
6. **Invite contributor to proceed to another station.** If the contributor needs assistance, find an Usher.
7. At the end of the day, put all Photo Forms in folder and return to event staff.

Digital Station Staff Instructions

Procedures for Image Collector

Image Copying

1. Put flash drive in USB port, or place DVD/CD in laptop drive.
2. Open folder to view files.
3. Identify photos to be contributed.
4. Copy these files into Event Name folder on laptop.
5. Re-name the file(s), using format: Event#.Nametag#.Photo#.
6. Leave the extension as it was on the original photo file. For instance, file DSC9989.jpg will become 57.102.1.jpg (See sample form attached).
7. Most images will not be TIFFS. Do not try to re-save as TIFFS.
8. Write the file format (TIFF, JPG, GIF, etc.) on the Photo Form.
9. View image on the laptop with contributor.
10. Review paperwork.

Emailing Photos from a Smart Phone

1. Review photo on contributor's phone
2. Review Photo Form for accuracy.
3. Instruct the contributor to email photo to Technical Team email address (TBD).
4. Subject line should include "Photo # (Event#.Nametag#.Photo#)".
5. Send at highest quality possible (usually called "Actual Size").
6. If you make a mistake, resend with a message indicating photo to be contributed.
7. Let the contributor know that if photo does not go through, we will contact them.
8. Note on the Photo Form that the image was emailed.
9. Event staff confirms delivery of email.

At the End of the Day

1. Turn off laptop.
2. Remove all cables.
3. Copy all photos to hard drive and return to event staff.