

This workflow was developed at an iDigBio workshop in January 2015. The most recent version is available at <https://github.com/iDigBioWorkflows/FlatSheetsDigitizationWorkflows> and <https://www.idigbio.org/content/workflow-modules-and-task-lists>.

## Appendix S8. Module 8: Organizing and Implementing a Public Participation Imaging Blitz

Task ID	Task Description	Explanations and Comments	Resources
T1	Identify expenses and funding source.	These might include snacks/drinks, artwork for event-branded items, and event-branded items. Funds could include crowdfunding campaigns.	Crowdfunding websites (e.g., <a href="https://experiment.com/">https://experiment.com/</a> ), branded merchandise companies (e.g., <a href="http://www.cafepress.com/">http://www.cafepress.com/</a> ).
T2	Identify specimens targeted for imaging.	Consideration might be made for how compelling the circumscription might be when advertising event. For example, in-state specimens might be of greatest interest to local participants. Flag folders or shelves of candidate specimens with brightly colored tags so that it is readily apparent which specimens will be used during the blitz.	
T3	Determine if specimens require curation.	This may include barcoding and nomenclature updates.	Pre-digitization curation module.
T4	Select an imaging station(s).	Considerations may include available resources, available space, budget, number of specimens to be imaged, and the number of people that will be helping with the blitz.	Module 2: Selecting Components for an Imaging Station.
T5	Purchase necessary equipment.	A typical imaging station (not a conveyor system) is most efficient with three people and has typical output rate of 100–125 images per hour. Based on the number of specimens to be imaged, you can estimate how many stations will be needed and what, if any, additional equipment must be purchased.	
T6	Create artwork for	Required if a participant incentive	Artist or designer.

	event.	includes an event-branded item.	
<b>T7</b>	Order event-branded incentive gift.	Required if a participant incentive includes an event-branded item.	Branded merchandise companies (e.g., <a href="http://www.cafepress.com/">http://www.cafepress.com/</a> ).
<b>T8</b>	Determine where specimen images will be saved.	Designate hard drive or server space for the large image files	Module 7: Image Processing. Module 9: Image Archiving.
<b>T9</b>	Ensure camera and computer software are up to date.	Test that all software is up to date and functional and that all equipment in the workflow can communicate with each other.	
<b>T10</b>	Identify date for event.	Taking into account timing of other (potentially competing) events and calendar for space availability and parking.	Institution's calendar, local newspaper's entertainment calendar.
<b>T11</b>	Identify space for the event.	Temporary imaging stations may be set up in locations outside of the collections space.	
<b>T12</b>	Identify event leaders.	These will serve as imaging mentors during the event, and their availability should be determined prior to establishing a date and time for event. Specifically, a staff member familiar with the organization of the collection should be in attendance. This person will pull specimens from the stacks, pass them to imaging stations, and return specimens to the correct location in the stacks.	Herbarium staff.
<b>T13</b>	Identify and reserve parking for event.	For universities, home sports events can significantly curtail parking availability on the days that they occur.	Institution's parking reservation calendar.
<b>T14</b>	Establish registration strategy.	Can include registration software that requests participants' contact information (e.g., Doodle Poll Premium).	Registration software (e.g., Doodle Poll Premium <a href="https://doodle.com/prmium">https://doodle.com/prmium</a> ).
<b>T15</b>	Establish advertising strategy.	Can include local media (e.g., newspapers and TV), social media (e.g., organizational Facebook pages),	Institution's communications office. Social

		listservs, in-person announcements at events (e.g., local chapter of a native plant society). Specify useful skills (e.g., typing) and minimum age for participation (participants as young as 12 have successfully participated). Event artwork can be used for advertising.	network, blogging, and email infrastructure.
<b>T16</b>	Create post-event survey.	Topics could include questions regarding increased familiarity with biodiversity specimens and collections, satisfaction with aspects of the event, likelihood of participation in the future, and participant background.	Professional evaluator (if available).  Google Forms ( <a href="http://www.google.com/forms/about/?gclid=CNeavuzm88UCFYUJHwodKFkAaw">http://www.google.com/forms/about/?gclid=CNeavuzm88UCFYUJHwodKFkAaw</a> ) and Survey Monkey ( <a href="https://www.surveymonkey.com/">https://www.surveymonkey.com/</a> ) provide simple methods for creating online surveys.
<b>T17</b>	Write introduction to event.	Can include PowerPoint presentation and handouts about the collections, and relevant research.	Presentation software (e.g., PowerPoint).
<b>T18</b>	Write training content.	Can include PowerPoint presentation and handouts, and include information about proper handling of specimens.	Presentation software (e.g., PowerPoint).
<b>T19</b>	Communicate event logistics to registered participants.	Can include map of parking and event location, recommendations regarding comfortable clothes.	Email software.
<b>T20</b>	Recruit event photographer.	Can be an event leader.	Camera or mobile device with good-quality camera and flash.
<b>T21</b>	Recruit social media communicator.	Social media communicator to be active during event. Communicate event hashtag to participants.	Social media platforms (e.g., Facebook, Instagram).
<b>T22</b>	Acquire volunteer and on-camera waivers.	Required, if institution has official forms for volunteers to fill out at event. If institution requires receipt of forms prior to participation, these could be included	

		in the logistics communication.	
<b>T23</b>	Create nametags.	Can include event artwork on nametag. Print a few blanks for those who show up without registering.	Name badge labels (e.g., Avery® Flexible Name Badge Labels, 2 1/3" x 3 3/8") and word processor template for printing to them. <a href="http://www.avery.com/avery/en_us/Products/Name-Badges/Name-Badges/_/dimensions-2-1-3-x-3-3-8/?Ns=Rank%7C0%7C%7CProduct%20Number%7C1&amp;N=4294967259+4294964846">http://www.avery.com/avery/en_us/Products/Name-Badges/Name-Badges/_/dimensions-2-1-3-x-3-3-8/?Ns=Rank%7C0%7C%7CProduct%20Number%7C1&amp;N=4294967259+4294964846</a>
<b>T24</b>	Set up stations.	Arrange equipment (camera, light box, scanner, and computer) in efficient arrangement.	Module 3: Imaging Station Setup, Camera, Module 4: Imaging Station Setup, Light box, Module 5: Imaging Station Setup, Scanner.
<b>T25</b>	Rehearse flow.	With staff, complete a test run of the flow of the specimens from cabinets, through imaging stations, and back to cabinets. A station should have three people: #1 removes the specimen from the folder and places it in the light box or on the copy stand, #2 snaps the shutter release on the camera at the “Ready” call of #1, and #3 checks the image on the monitor, removes the specimen from the light box/copy stand, scans the barcode, and returns the specimen to its folder. A runner can serve multiple stations and works between the staff member “in the cabinets” and the stations to ensure each station always has specimens at the ready.	
<b>T26</b>	Hold event.	Arrive early to prepare technology, space, and registration table. If there are	

		multiple locked entrances to the building, place signs at entrances not in use to guide participants to those that are in use. Tell participants where to find nearest restroom.	
<b>T27</b>	Periodically check images at each station.	Event leaders should circulate among stations and look at the images that are being produced. Markers on the light box or copy stand can move, and camera and computer settings can inadvertently change, so it is necessary to check that all settings remain as intended to ensure quality. This should be done for approximately every 10 images for the first 30, then every 100 images for the duration.	
<b>T28</b>	Distribute post-event survey.	In last 15 minutes of event.	
<b>T29</b>	Articulate thanks and distribute incentives.	In final minutes of event.	Incentive gifts.
<b>T30</b>	Take group picture.	For follow-up reporting on event. If taking photo outside, can do so after event ends.	Camera. Photographer.
<b>T31</b>	Process images.	Batch process images. May include cropping, color corrections, lighting corrections, image orientation, and file type updates. See Module 7: Image Processing for more details.	Module 7: Image Processing.
<b>T32</b>	Transfer images to server.	This may involve moving JPEG images to a web server to be displayed to the public through an institutional or other public web interface in association with specimen records and transferring archival images to permanent electronic storage.	
<b>T33</b>	Analyze post-event survey.	Determine frequency distributions for the answers.	Professional evaluator (if available).
<b>T34</b>	Create event report to communicate results.	Could be blog post.	Institutional or project blog.

