

Tool Assessment and Selection:

Building a use case and applying factors instructions

Adapted from the DANNNG Tool Selection Factors, Appendix A

Set Up: Profile and Scope (5 minutes)

Spend a few minutes documenting a profile. We recognize that this could be a large conversation and our time today is limited, so you might consider setting a narrowly-scoped goal. Given our time constraints today, we've created a list that you can select from to create your profile.

- I work as one of the following roles:
 - Digital archivist
 - Archivist
 - Digital archives assistant
 - Accessioning archivist
 - Records manager
 - Project manager
 - Curator
 - Library application developer
 - Digital preservation analyst
- I work in one of the following organizational contexts:
 - Academic institution
 - Local historical society
 - Corporate archives
 - Government archives
- My goal is to:
 - Extract technical metadata from a heterogeneous file set
 - Transfer files from a local computer to a networked file share
 - Create compressed disk images from external media
 - Scan a heterogeneous file set for sensitive or personally identifiable information
 - Provide proof that outputs are identical to source inputs, and that the source input is not changed by my actions
 - Package materials for transfer or storage
- My role and institution operates under the following IT constraints:
 - Operating systems
 - I must restrict myself to tools that work in a specific operating system

- I do not have to restrict myself to tools that work in a specific operating system
 - IT support
 - My IT department is really hands off when it comes to installation, updates, and usage support
 - My IT department is really involved when it comes to installation, updates, and usage support
 - My institution does not have an IT department
- I operate under one of the following general budgetary constraints:
 - I have access to a budget for enterprise-level software (or software solutions that the institution has already provisioned for)
 - I have access to a budget for one-time purchases
 - I have access only to a limited budget and/or a strong preference for “free” utilities

Apply the factors (15 minutes)

Considering your profile and goals you’ve set, apply the [Tool Selection Factors](#) to one or more tools. In the interest of time, we recommend identifying 2-4 factors from the Tool Factors rather than the entire set of factors. Feel free to use the three factors highlighted earlier in this workshop (***Inputs and compound input sets***, ***Installation requirements and process***, and ***Interface***) or choose a few from the full list.

In the worksheet, you should:

- Assess one or more tools’ suitability for achieving the goal selected in the Setup portion using the Factors document.
- Any tools you are aware of are in scope; [COPTR](#) is a good resource that includes a large number of tools.

When we come back together as a group, we will solicit feedback via chat or voice. The questions we’ll ask you to respond to are:

- How would you adapt this process for use in your personal context?
- Which factors, if any, stand out as particularly relevant to your context?
- How did you find this process overall?
- What questions do you still have for us?

And if you have substantive feedback or reflections, we ask that you use the Zoom chat so that we can incorporate that into future DANNNG work.

Example worksheet

Profile Summary: Archivist at a local historical society with no dedicated IT department and access to a budget for one-time purchases

Goal Summary: package materials for transfer or storage

Tool	Factor(s)	Notes/Assessment
bagit.py	Interface	I am comfortable with command line operations, but other colleagues in my unit may not be
bagit.py	Installation	Managing python libraries on multiple workstations will be a challenge in my institution unless our IT department adopts this for official support

A clean copy of the worksheet template can be [found here](#) for downloading and copying.