Center for Digital Research in the Humanities Project Handbook

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This handbook documents the procedures, best practices, policies, workflows, and terminology of projects related to the Center for Digital Research in the Humanities (CDRH). The purpose of this handbook is to be a reference source, an onboarding tool for new staff and principal investigators, and to document what has historically been implicit.

The CDRH supports the digital humanities scholarship of University of Nebraska-Lincoln faculty, staff, and student researchers. Support offered by the CDRH may include:

- Grant assistance
- Project management
- Metadata creation guidance
- Metadata production
- Data set creation guidance
- Text encoding
- Transcription / Optical Character Recognition
- Image scanning
- Data storage and server management
- Student training
- Website design
- Website development
- Map creation
- Publication
- Promotion

The digital humanities projects advanced by the CDRH are often, but not always, conceived by CDRH Fellows and Affiliates. Learn more about Fellows and Affiliates on the Affiliate & Fellow Nominations page and about existing CDRH projects on the CDRH Digital Scholarship page.

As the Digital Scholarship page demonstrates, most CDRH projects are implemented as publicly accessible websites, though projects may take other forms. Principal Investigators, or PIs, along with designated CDRH staff partners, may also conduct research, add to an existing site, or develop code to address a specific issue, among other possible outcomes.

This handbook is organized into sections based on a standard sequence of project stages followed by an appendix containing a glossary and supplementary resources. The four stages are:

1. Initiation
2. Planning
3. Execution
4. Closure
1. Initiation Stage

The Initiation Stage is the first stage of a project. During this stage, the project is identified and communication with the CDRH begins. It is also the stage when the project is approved or denied by the CDRH Projects Committee, a key stakeholder group in CDRH projects.

1.1 Conception

CDRH projects are initiated by a PI. PIs are responsible for identifying and addressing the project’s core research questions and high-level project administration. If a project’s PI believes their digital humanities project aligns with the CDRH’s Strategic Objectives and would benefit from its support, they should reach out to the Assistant Director of the CDRH. The Assistant Director will provide initial guidance and may suggest a meeting with other leaders in the CDRH community. This meeting is used to assess the project’s relevance to the CDRH and to determine how the CDRH can support the project. Then, if the PIs are interested in moving forward, they will submit a Project Application.

1.2 Project Application

All projects must go through an application process before any work is done by CDRH staff. To apply, PIs must complete either a Pilot/Prototype Project Application or a Production Project Application. As noted on the CDRH Project Application page, Pilot/Prototype applications “are for digital humanities work that is at an early stage of development,” while Production Project Applications “are for digital humanities work at a later stage of development.” A Pilot/Prototype Project without external funding could entail initial technical guidance, assistance with dataset creation, and planning meetings for grant development. Given the amount of labor and time it takes to develop a project site, website creation necessitates external grant funding. Project applications should be scoped with this in mind.

The CDRH Projects Committee—a committee established by the CDRH Governance Document—is the body that oversees this process. Once the deadline for applications has passed, the CDRH Projects Committee convenes to discuss the merits of the applications received and consider the capacity of the CDRH to support the project as proposed, then decides which projects will be accepted, accepted with negotiated revisions to the plans, or declined.

After decisions are made, the CDRH Associate Director, who convenes and chairs the Projects Committee, sends letters to applicants summarizing what was said by the Projects Committee, whether the application was accepted, and the next steps. In some unique circumstances, the Projects Committee will partially accept a project, suggest ways the project could be adjusted for future acceptance, or recommend alternative methods of support. Once a CDRH Project Application is accepted by the CDRH Projects Committee, it is considered a CDRH Project.
1.3 Funding
External grant funding is essential for projects that require a significant amount of CDRH staff time and resources. Grant applications should be submitted following a project application’s acceptance, not before. Submitting a grant application before a project is accepted by the Projects Committee can lead to scenarios where work is expected to be done by CDRH staff without their knowledge or approval. However, projects with preexisting funding sources or with PIs currently seeking grants are looked upon favorably by the Projects Committee. Though grants are not strictly necessary, the CDRH prioritizes projects tied to grants due to their funding and deadline requirements. Grants are beneficial to both the day-to-day operations and long-term growth of the CDRH as a research center.

The National Endowment for the Humanities (NEH) has historically been a major source of grant funding for CDRH projects. The Digital Humanities Advancement Grants and Humanities Collections and Reference Resources programs are often relevant to the kinds of digital humanities projects the CDRH supports, though other NEH grant programs should be considered depending on the nature of the project.

Examples of CDRH projects that received NEH grants include the Recovery Hub for American Women Writers, which was awarded an NEH Digital Humanities Advancement Grant in 2020, and the Genoa Indian School Digital Reconciliation Project, which was awarded a Humanities Collections and Reference Resources Grant in 2019. Other examples of projects that received NEH funding include the Nebraska Digital Newspaper Project, The Willa Cather Archive, The Charles Chesnutt Digital Archive, and The Walt Whitman Archive. These are all ongoing digital humanities projects composed of multiple smaller projects that have been sustained over the years by grant funding and continue to receive robust CDRH support.

The CDRH and UNL Libraries offer several types of support to grant seekers. A collection of successful grant applications may be viewed on the CDRH SharePoint site for reference during the grant writing process. The CDRH also maintains a list of awarded grants and their funding agencies. The Co-Directors of the CDRH and other members of the CDRH community are willing to meet to impart their advice and are committed to providing support and encouragement to PIs seeking funding. The CDRH is served by the Big Red Business Center (BRBC); the BRBC offers UNL Libraries, CDRH, and its collaborators assistance with pre- and post-award research including locating funding, budget creation, compliance, monitoring, and reporting.

1.4 Initiation Stage Completion Checklist
1. Conceive project.
2. (OPTIONAL) Meet with relevant CDRH leadership to discuss project.
3. Submit project application.
4. Receive letter of acceptance from Projects Committee.
5. Begin seeking external funding.

2. Planning Stage
The Planning Stage is the second stage of a CDRH project, where the CDRH works with PIs to create a plan to bring a project to its completion. The PI will have been notified that the project has been accepted by the CDRH Projects Committees; they will be encouraged to reach out to the CDRH Project Specialist when they are ready to begin planning. For projects that seek to develop a production site, grant funding should be confirmed by this stage. Though a significant amount of work and planning may have already been undertaken by PIs, this stage focuses on planning the project as a CDRH Project with a discrete start and end date. Project planning begins with the development of a project charter—the key deliverable of this stage.

2.1 Project Charter Drafting
The first step following the acceptance of a project application is to draft a project charter. The project charter is a document that summarizes the project and the CDRH’s role in it, synthesizing relevant documentation, like project applications and grants, and the input of the PI and project team members. A project charter is used to scope the project and document the work to be done, outlining practical components of the project like deliverables, tools, deadlines, and a schedule with discrete start and end dates. Though the larger context of the project may be included, the project charter is meant to capture the work to be done by the CDRH, rather than the project or grant in its entirety. Any work requested of project team members that is not directly related to deliverables that the CDRH is responsible for is considered out of scope.

The project charter is developed with input from PIs, CDRH Project Specialist, Libraries Co-Director of the CDRH (who also serves as Chair, Digital Strategies), and other relevant staff members such as the Assistant Director of Digital Libraries and Scholarly Infrastructures, Front End Developer, and Metadata Encoding Specialist. This is usually done via email, though face-to-face meetings are sometimes useful to address complicated matters or when negotiation is required. The CDRH Project Specialist handles the bulk of the communication, information gathering, and writing required of a project charter.

Once a draft of the project charter is complete, the Project Specialist circulates it to all primary project team members and the Co-Director of the CDRH for review. A completed, signed project charter serves as an agreement between PIs and the CDRH, and is used to keep the project on track through its development. Projects lasting more than one year will have their charter reviewed by the CDRH Project Specialist midway through and revised should it become outdated. Any major revisions should be approved by all the original signers.
2.2 Kickoff Meeting

A project kickoff meeting is the other major component of the Planning Stage. This meeting signals the transition from the end of the Planning Phase to the beginning of a project’s Execution Stage. In a kickoff meeting, all members of the project team convene to discuss the work to be done early in the project’s development. Nothing proposed during this meeting should conflict with the timeline and work to be done in the charter; rather, this meeting should help initiate the work identified in the charter and serve as an opportunity make slight adjustments before the charter is signed and to bring in relevant team members that were not directly involved in the charter’s creation.

Topics discussed during the kickoff meeting are often more granular than what is outlined by the charter; for instance, topics discussed may be student availability, how the materials will be housed, metadata best practices, and how the project will be integrated into CDRH priorities. An agenda should be made in advance of the meeting and a notetaker should be assigned. Any deadlines identified during this meeting are tracked by the Project Specialist. The project
charter may be signed during this meeting if all relevant members are in attendance and reach a consensus on its finalization.

2.3 Planning Stage Completion Checklist
1. Work with the Project Specialist and relevant team members to complete a draft of a project charter.
2. Share draft with team and CDRH Co-Director for review.
3. All project team members attend kickoff meeting and make any final adjustments to charter.
4. Sign final version of project charter.

Sample Project Timeline

3. Execution Stage
The Execution Stage is the third stage of a CDRH project, where CDRH staff members perform their work on the project in consultation with PIs, implementing the plan established by the project charter to produce all deliverables. This is the most complex stage of any project, as projects often require student training, data and metadata production, database creation, and web development and design. Clear and consistent communication, empathy, and being open to change will help advance any project.
In some cases, technical constraints or the availability of project team members may mean that projects unfold in ways that conflict with the expectations of the Principal Investigator. CDRH staff members have many duties and commitments outside of each project. All CDRH staff members have the authority to refuse work that is outside the scope of a project. If there is a difference of opinion between principal investigators and CDRH staff members about how the project should proceed, the PIs, staff members, and the CDRH co-directors should gather to resolve the issues.

Projects the Execution Stage are divided into four phases: Data Phase, Site Creation Phase, Soft Launch Phase, and Launch Phase. Projects are normally conducted in this order, though the Data Phase almost always coincides with the Site Creation Phase. Additionally, projects that require extensive review may include an additional fifth phase called the Beta Launch that occurs prior to the Soft Launch.

3.1 Data Phase
The Data Phase is when the data and metadata for a project is created. All digitization, transcription, and text encoding work is part of the Data Phase. The Metadata Encoding Specialist normally oversees this portion of the project, providing guidance on metadata management and implementation, like adapting or creating schemas, establishing best practices for data collection, and ongoing quality assessment.

The data phase is normally the phase of the project where students are most involved. The Metadata Encoding Specialist works with PIs to determine what work can be done by students, then trains them accordingly. This may involve teaching students how to use document or microfilm scanners, transcribe text, encode text, or enter data into a spreadsheet. Some projects come to the CDRH with existing datasets; in these instances, PIs work with the Metadata Encoding Specialist and CDRH Dev Team to determine the best methods for structuring, ingesting, and displaying the data.

Microsoft Excel 365 and Oxygen XML Editor are standard platforms used for CDRH project data entry. Some projects with more advanced data entry or data structuring needs benefit from the use of Airtable, a subscription-based spreadsheet-database hybrid. A major benefit of Airtable is that it offers a user-friendly way for PIs to view, structure, and manipulate a dataset before it is ingested into a development site. Datasets in Airtable may be exported to CSVs and ingested via the CDRH Publishing System.

After all data and metadata is collected, cleanup is required. The amount of time and effort required to clean up the data depends on the size of the dataset, how the data was collected, who is doing the cleanup, and the tools used.
The Data Phase is complete once all data, metadata, and media files are collected and ingested into a repository or stored on a server. The completion of this phase is considered a significant project milestone.

3.2 Site Creation Phase
For projects with a website component, the Site Creation Phase is when website development and design occur. Though many projects follow a similar trajectory of development, the unique requirements of each project mean there are many ways to approach this phase.

The PI coordinates with the Dev Team Lead to plan, implement, and satisfy the development and design aspects of the project. Ideally, most of the planning work was completed in the Planning Stage and captured in the project charter, but additional strategizing is often necessary as projects take shape. Current and former members of the CDRH Dev Team have provided their insight into project site development on the CDRH Development Blog. Here are a few blog posts for reference: Cartas a la Familia: A Lesson a Lesson in Internationalization and Lewis and Clark: Going to the Sources.

Many recent CDRH projects utilize the CDRH Publishing System. This system consists of several custom pieces of software developed to address the unique requirements of digital humanities site creation. These include the CDRH API, a Rails engine (Orchid), and a Ruby gem (Datura). The CDRH Publishing System supports the transformation, ingestion, and indexing of project files so that they may be displayed on a project site. This process is documented in this blog post and depicted in the diagram below. Other systems, such as Omeka S or Mukurtu, may supplement or replace the CDRH Publishing System depending on the needs of the project.
the site building process into “sprints” or “code blocks” — this lets the development team concentrate on a single project rather than jumping from project to project. There may be only one long code block or there may be several depending on the needs of the project. For instance, sometimes the development team discovers more work needs to be done with data entry before site feature creation continues. What work should be prioritized is determined by the CDRH Project Operations Group, weighing factors like deadlines, events, and staff capacity. This group is composed of the CDRH Co-director, Assistant Director of Digital Libraries & Scholarly Infrastructures, Metadata Encoding Specialist, and CDRH Project Specialist.

It is preferable to have a large, representative amount of data before creating a site, otherwise the development team must adjust the site to accommodate edge cases in the data. Design usually comes after an initial pass at getting the data displaying.

Site development is handled by the Front End Developer and Programmer/Analysts, under the supervision of the Dev Team Lead. The Front End Developer creates the interface of the project site, while the Programmer/Analysts write the code that powers the site. Programmers/Analysts are assigned based on availability and skillset.

Design work is handled by the Front End Developer in consultation with PIs and other relevant members of the project team. If they haven't already, PIs should prepare drafts of site text, including introductory homepage text, credits, and any other additional context required. The CDRH recommends adhering to writing for the web accessibility guidelines like Writing for the Web by Usability.gov and Writing for Web Accessibility by the Web Accessibility Initiative. Following these guidelines helps ensure that CDRH projects are accessible and promotes uniformity across projects.

This text is incorporated into the design and is necessary for a site to reach the end of the design process. PIs may work collaboratively with the Front End Developer to make decisions about design specifications such as images, fonts, colors, and layouts. If PIs do not show interest in this component of the project, the Front End Developer uses their own judgment.

Though the CDRH takes great care and pride in the aesthetics of project sites, without appropriate funding, support, and time, functionality supersedes any design embellishments sought by PIs. PIs with specific design requirements or desires should identify them prior to the Execution Stage. To enhance the aesthetic qualities of project sites, PIs have utilized grant or other funding to pay artists and freelance web designers. These collaborations have been positive and are encouraged.

3.3 Project Check-In Meeting
One or more check-in meetings are scheduled midway through the Execution Stage to assess how the project is progressing. All available members of the project team will attend these meetings, along with at least one of CDRH Co-Directors, the Assistant Director of Digital
Libraries & Scholarly Infrastructures, and the CDRH Project Specialist. This meeting is used to take stock of what has been working and what hasn’t, so workflows for the remainder of the project may be adjusted accordingly. These check-in meetings are in addition to any regular project meetings scheduled by the PI and project team.

3.4 Beta Launch Phase (optional)
For sites that require community input, peer review, or other reviews, a project may have a Beta Launch Phase where site content is finalized, and the site is made available to outside collaborators for an extended period for review. A project site in its Beta Launch Phase is often still hosted on the development server, meaning that the site is still private and password protected. Soft launch and hard launch dates should be finalized during the Beta Launch Phase, if they haven’t already.

3.5 Soft Launch Phase
The Soft Launch Phase is when the site is in a stable, near complete state but has not yet been advertised to the public. During this phase, testing and quality review are conducted, and the site may be shared with stakeholders. This is at least one month (ideally longer) before the site goes live so there is plenty of time for bug fixes and final changes. The CDRH Dev Team requires the identification of a cutoff date for data ingestion (that is, a hard deadline for providing the data that will form the publication), so a stable version of the site is ready for launch. A project in soft launch is live on the production server and available without a password but is not advertised widely or linked from the CDRH page. If anything on the site is sensitive and requires review before being made public, the project should go through the Beta Launch Phase first.

The Beta and Soft Launch Phases are when plans for press, promotion, and launch events should begin to materialize. PIs may work with the CDRH Project Specialist, CDRH Co-Directors, and other members of the project team to develop plans for the Production Launch Phase.

3.6 Production Launch Phase
The Production Launch Phase, sometimes called a “hard launch,” occurs when the project is in a complete state and is ready to be published, promoted, and posted to the CDRH Digital Scholarship page. Plans for promotion and events should be finalized by the beginning of this stage. Launch events are not required but are strongly encouraged. All the work that goes into seeing a project to its completion should be celebrated! They are also useful moments for reflection, community building, stakeholder involvement, communication, and dissemination. It is up to the PI to drive the event planning for the launch event (and often it can be supported by UNL communications and event professionals), but CDRH staff on the project team may be willing to assist.
As part of the project launch, there may be handouts, postcards, bookmarks, or other promotional materials desired. PIs should think about the cost of these materials at the beginning of the project so there are funds to cover the printing costs. PIs may also want a press release for the site – there are communications professionals in the Libraries as well as other colleges who should participate in the release creation. The CDRH asks that PIs inform staff when promotion will happen. All project launches are promoted on the CDRH Twitter and Facebook pages and shared in the semesterly CDRH Newsletter.

3.7 Execution Stage Completion Checklist

1. Data Phase
   a. Train students.
   b. Complete all data entry, scanning, image editing, transcription, text encoding, and metadata production.
   c. Produce a repository of all project data and assets.
   d. Ingest data.
2. Site Creation Phase
   a. Write interpretive and contextual text for project site, including an About Page and Credits.
   b. Develop and design project site.
3. (Optional) Launch beta version of project site.
4. Soft launch the project site.
5. Create a plan for promotion and launch.
6. Launch a complete, live version of the project site.
7. Add the site to the Digital Scholarship page of the CDRH Website.
8. Promote the project.
9. Have a launch event.

4. Closure Stage

After a project has launched, it enters its fourth and final stage: the Closure Stage. The Closure Stage signifies the end of the CDRH's active commitment to a project. During this stage, the project is reviewed to ensure that all project and grant deliverables have been produced and that the future of the CDRH's involvement with the project is agreed upon. These decisions should be finalized in a project closure meeting.

4.1 Project Closure Meeting

A project closure meeting is a structured meeting where project team members answer a set of prepared questions to assess how the project went, acknowledging what aspects of the project went well and what could be improved. A document is prepared by the CDRH Project
Specialist summarizing the responses to these questions. This document is shared with CDRH Co-Directors and Assistant Director. The Assistant Director may summarize the results at a later CDRH Projects Committee meeting.

The results of this assessment are used to improve the project development process and to keep the CDRH Projects Committee informed as an ongoing stakeholder in CDRH projects. This document may be reviewed should another project by the same PI be submitted to the CDRH Projects Committee.

Additionally, during the closure meeting, project team members identify any remaining work, such as final data ingestions and bug fixes. Though any work done beyond what was identified in the project charter is considered out of scope, additional data ingestions or other small updates may be completed if all parties are willing, and if time is available. This work is not prioritized over active, grant-funded projects. As such, significant delays may occur. If some aspect of the site is not working, however, the CDRH dev team will address it as quickly as possible.

4.2 End of Project Checklist
During this phase, the CDRH Project Specialist works with all members of the project team to complete a copy of the CDRH End of Project Checklist. This document helps ensure that all work has been completed and systematize project closure. Once this document is complete, it is attached to the project charter, and all members of the project team are notified that the project has been completed.

4.3 Future Work & Project Archiving
Any major updates or additions to a project must go through the project application process once more. For example, a PI of a completed Pilot/Prototype Site project may consider putting in an application for a Production Site project. PIs seeking grant funding to continue work on their project should remain in contact with project team members and CDRH leadership.

All CDRH Projects are subject to the CDRH Project Archiving Policy. An archived project is one which is preserved to the best of our ability in a static manner and will receive no further alteration. See the CDRH Project Archiving Policy for more information.

Students looking for additional work at the CDRH at the end of a project may contact the CDRH Metadata Specialist.

4.4 Closure Stage Completion Checklist
1. Attend project closure meeting with all project team members.
2. CDRH Project Specialist submits assessment documentation.
3. Final data ingestion and bug fixes if necessary.
5. Appendix

5.1 Glossary

**Airtable**: A spreadsheet-database hybrid utilized by several CDRH projects for database design, data entry, and project management. Has a $12/person monthly fee for all contributors; read-only access is free.

**Beta Launch**: Optional launch phase where site content is finalized and made available to stakeholders for review. During a beta launch, projects are still on the development server and password protected. Comes before a soft launch.

**CDRH API**: An application programming interface (API) to access all public Center for Digital Research in the Humanities resources. Codenamed “Apium.”

**CDRH Dev Team**: Group of CDRH staff responsible for site design, development, and server administration. Currently composed of a Front End Developer, Programmer/Analyst II, Programmer/Analyst II, and other staff with technical specialties as determined by the project.

**CDRH Fellows**: CDRH Fellows shall include UNL faculty and managerial/professional staff whose main focus of scholarship in the disciplines is related to digital humanities or is expressed through digital means. Fellows are expected to engage in innovative digital scholarship, explore research questions that engage technologies, and conduct original, substantive scholarship that will attract grant funding and/or recognition for the University and the Center.

**CDRH Project**: A digital project that has been accepted by the CDRH Projects Committee.

**CDRH Projects Committee**: Responsible for developing and maintaining documentation developing criteria for Center projects and the processes by which projects become Center projects. This group discusses proposed new projects, recommends projects for Center adoption, and recommends projects for archiving.

**CDRH Project Implementation Team**: A small group consisting of the Chair of Digital Strategies, the Assistant Director of Digital Libraries & Scholarly Infrastructures, the Metadata Encoding Specialist, and the CDRH Project Specialist that monitors all CDRH projects.

**Datura**: A Ruby gem dedicated to transforming and posting data sources from CDRH projects. This gem is intended to be used with a collection containing TEI, VRA, CSVs, and more. See the [CDRH/datura GitHub page](https://github.com/CDRH/datura) for more information.

**Elasticsearch**: Full-text search engine used in some CDRH projects.

**Kickoff Meeting**: A meeting held at the beginning of the Execution Phase that initiates work identified by a project charter.
**Orchid:** A multilingual Rails engine which handles common functionality across Rails apps which rely on the CDRH API. Developed by the CDRH.

**Pilot/Prototype Project Site:** Pilot or prototype sites are for digital humanities projects that are at an early stage of development. Generally, a pilot project will not be permanently hosted on UNL library servers but rather have a short-term lifespan in order to build a proof of concept or demonstration project.

**Principal Investigator (PI):** The individual (or individuals) responsible for a project’s creation, scholarly contributions, grant writing, and high-level administration. PIs are often, but not always, CDRH Faculty Fellows. Also known as the Project Director.

**Production Project Site:** Production sites are digital humanities projects that are at a later stage of development. Projects ready for production mode will often be built on an existing prototype.

**Project Application:** A form that must be completed for projects to be considered by the CDRH Projects Committee. Successful applications are considered CDRH Projects and will be codeveloped by the CDRH staff along with the Principal Investigator.

**Ruby on Rails:** Web application framework utilized by CDRH Development Team on most modern CDRH projects.

**Soft Launch:** When a site is in a stable, near complete state but has not yet been advertised to the public. Comes after a beta launch but before a production launch.

**Production Launch:** Sometimes called a “hard launch,” a production launch is when a project site is complete, live, and ready to be shared with the public. Project sites are added to the CDRH Digital Scholarship page during this phase. A launch event may be scheduled during this phase.

### 5.2 Resources
- [CDRH Website](#) – Public UNLcms website.
- [CDRH Project Application](#) – Landing page for project application forms.
- [CDRH GitHub](#) – GitHub site containing CDRH project data and rails repos. Some repos are public; others are private (incomplete projects; projects with privacy issues).
- [CDRH Development Blog](#) – Blog maintained by the CDRH Dev Team.