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Planning Digital References and Studies

Organizing and indexing philatelic information makes it readily available.

By Francis Adams

Part II

Part one of this series, Francis Adams' CREATING DIGITAL REFERENCES AND STUDIES appeared in the second quarter issue of THE PHILATELIC COMMUNICATOR. A third article — A BASIC FORMATTING GUIDE FOR DIGITAL PHILATELIC STUDIES — will appear in the first quarter issue of TPC in 2008.

Once a collector turns to exhibiting, the requirement to increase one's philatelic knowledge expands exponentially, typically as a result of the need to display that knowledge to further an award level. Accumulating reference material is not the goal of the exercise. The materials must be organized, indexed, and readily available to support your information needs.

Accessibility of information is the most important element and electronic media is one way to make your knowledge requirements quickly available. Digital references can be invaluable information organization tools, especially if they're portable and cross platform. Once assembled, digital information can also be published for public consumption in the forms of printed matter, slide shows, Web sites, digital philatelic studies (DPS) or references.

As a matter of clarification, the term *digital philatelic study* is defined as an electronic presentation on a narrowly selected philatelic subject, much like a detailed article. A *digital philatelic reference (DPR)* is a wider, more comprehensive body of information on a subject presented with more of an encyclopedic treatment in that it contains more tangential information on the subject. Either type of work can be distributed on compact disc or through the Internet.

Building a DPS or reference requires planning, organization, a logical structure and personal effort. Hopefully, the following information will benefit interested readers as it contains steps I've found valuable in producing such electronic philatelic presentations.

Defining the Project Scope

In 1999, I began with the idea that an electronic philatelic exhibit would be valuable if I could integrate additional information. Thereafter, imagining how comprehensive it could be and what types of data it might include produced a goal of a full-bodied reference machine. As with most labors of love, my visions were

greater than my expertise. I was forced to confront unforeseen obstacles but continued as this was something I really felt would be both interesting and useful.

That early digital exhibit has since grown into the proportions originally envisioned and become a DPR rather than a 16-page exhibit with a bit of support material. I've since promised myself that for future projects, I would be more thoughtful in regard to my personal ambitions.

You may be thinking the challenge of building a digital reference is too great a task. If that's true — you've successfully constructed a self-defeating wall — start with individual tasks to achieve the end goal. You'll be surprised how fast a simple thing grows in the world of digital philately.

Perhaps you also believe you're unable to do this alone. There are plenty of other collectors interested in sharing information and expertise. Find someone with similar interests whom you admire and would like to work with. Ask if they might be willing to join forces and produce a joint work. If there's more than only one person, that's fine. Joint projects can mesh individual knowledge and talents into a greater whole. (Finally, a use for those techie guys ...)

Let's lower your wall and begin with a few simple components for a DPS that could evolve into a DPR sometime in the future. You'll need a goal and a dream that result in the vision and persistence to realize the goal.

The Goal

The first step is defining your goal by answering three questions.

1. Why are you producing the DPS?

Examples: Personal benefit, benefit of others or simply for fun

2. What will your DPS be used for?

Examples: Information distribution, a pocket reference or a competitive literature entry

3. What are you not willing to compromise in your DPS?

Examples: Quality of information, production timeline or document size

The Dream

This part can be the most fun and picking your subject carefully will allow you to build your study with less effort. Focus on building a clear-cut DPS; your readers will thank you for it.

Continued on Page 16

Digital Planning — Continued from Cover

Unless you're a seasoned veteran, don't start with the *History of the Egyptian Mail Systems* or *Life on Earth*.

Pick a more modest and manageable subject, such as the *Earliest Recorded Pharaonic Letter on Watermarked Papyrus* or *Pilt-down Man*. In both cases, we're talking about limited items.

The Plan

Documenting your plan is a little more difficult than thinking about it — not from a technical point of view, but difficult from a motivational point of view. Many of us are lazy to some degree, believing we can remember everything we envision and later sadly realizing we're not further along with the project for lack of this discipline.

So, how do you document your plan? I suggest using a small notebook. Make legible and coherent notes in it as you daydream your project together. Don't worry about the sequence or completeness of your ideas at this point. The main thing is to write down your thoughts and ideas — you will sort it all out later.

Take a week. Think about the study you want to do for only one hour per day that week and write down ideas as they come along. One hour — then detach yourself. Doing such a time sensitive exercise will keep your mind fresh for that important hour. No fiddling with your notes and remember the most important point — no idea is too dumb — just write, write, write. Limit this phase to seven days as you'll get nearly 90 percent of your ideas during this time. The longer the period, the less productive it is nearer the end.

A DPS is not a digital exhibit. Open your thoughts process and allow yourself freedom to include ideas, information or materials not normally seen in a paper-based exhibit limited to 16 pages per frame. Now is not the time to be shy.

Notes may include philatelic material, run-of-the-mill points normally presented for the area, as well as more offbeat items such as: artwork and illustrations (printing presses, etc.), information from references, entire articles related to the subject (with permission of the authors), tidbits of knowledge from a friend, one or two colors associated with the subject, ideas on how you wish to present your creation, a theory you have or a question that needs an answer. This last one can get you further than you might believe.

Organization

After a successful week of note taking, let's organize your dream. You do not have to, nor should you, immediately execute every minute detail you've written down. Review your notes and pick out perhaps four or five main ideas and list them in an outline fashion. You should end up with a list of ideas that describe your chosen study in general terms that seem to flow from beginning to end. That's your storyline.

Build this outline at a high level as it covers the entire study. A valuable tool in evaluating which general ideas should be included is to ask "Why?" Why is this idea so important it should be one of the four? Can it be combined with another into a more general category? Occasionally, you might wish to include a particularly good idea, but it just doesn't seem to fit anywhere. Put it aside. Over time, the place for that idea will become evident, and it can be worked into the fabric of the study with less effort. This is a work in progress.

This initial planning exercise has resulted in a draft outline of your storyline. The remaining notes concerning colors, style, etc. will be used in our next steps, so keep them handy. We now build a four-level pyramid that incorporates your outline, materials, knowledge, labor and perspective. You may construct a pyramid with fewer or more levels — this exercise will use four.

A four-level pyramid (see figure on facing page) is the basic digital study structure and should remain flexible enough to accommodate the addition of items at each level. As you add content or points of interest, you will find your overall storyline **will** change, so don't lock yourself into a specific concept. Watch for opportunities to expand each level with new points of interest, material, and knowledge. (Remember those ideas that didn't fit before?) This is a dynamic process and it will become more refined as it is implemented.

Level 1 — Splash (Title) Page
The *splash* page of the study is at the apex of the pyramid, the main entry point for the study. A splash page is exactly that — you want to make a memorable first impression. A good first impression utilizes a clean design where the subject is immediately recognizable. You do not have to incorporate the latest technological innovations to make it a good experience.



A single stamp and souvenir sheet depict Pilt-down man.

The judicious use of graphics, a prominent title, perhaps a subtitle as well as the purpose and objective of the study is what we're aiming for. At the bottom of the page, include a footer area with a copyright notice and a version number or revision date. More information could be added, but the goal is to keep it simple and attractive. The viewer should look at the splash page and be intrigued enough to want to see what follows.

What comes next? Digging into the pyramid structure.

Level 2 — Introduction and Table of Contents

A more complete introduction than is found on the splash page is an important item on my personal list. This is the answer to the title page teaser and should make viewers hungry for the remaining pages by giving them the complete storyline in short-form. That's not to say your entire story should appear on this page, but a detailed overview of the study is appropriate.

Some exhibitors may not agree with this view, but keep in mind that this is not a philatelic exhibit. It's a digital study and therefore needs more depth than can be afforded in the exhibit frame simply because it presents depth in the subject and is not restricted by physical boundaries.

A table of contents or index is important in the study and you may have both. I personally like both as it increases the viewer's ability to find information quickly. A table of contents consisting of bullet points and a few words describing each bullet point is informative and short. It can be constructed by selecting several of the ordered ideas from your notebook exercise. Produce the bullet points by synthesizing each main idea into a word or two, essentially section headings. An index can be included in Level 4.

Level 3 — Philatelic Content

The main philatelic content should follow the introduction and table of contents. Go directly to the substance of the study and give the viewer what they came to see. What, besides stamps, should you include in your study?

It depends on the type of study, but in general, these are philatelic items you own or aspire to. You can scan your materials and ask if owners of other materials might also provide you with scans. Everyone enjoys having their efforts recognized, so ensuring that owners are recognized as study contributors is key to obtaining cooperation. **Do not** renege on your part of the deal! If anything, give them more credit than they're due ...

My digital reference includes all types of philatelic materials, exhibit pages, checklists, maps, illustrations, descriptive texts, historical documents, postal regulations, etc. Anything you deem ap-

propriate can be used as this is your dream, just remain aware of copyright restrictions.

Be comprehensive by including materials directly associated with the subject. It's a good practice as it strengthens the study. Correctly and logically arrange the material and allow the focus pieces on a page to shine by not overcrowding them.

A catalogue type study is a reasonable place to start and may actually help you in the beginning. As you develop however, keep your focus! Don't allow *scope creep* to expand your initial idea beyond your goal, diluting your project so it's only a *Jumble of Stuff on the Subject of ...* When in doubt, leave it out (or consider including it in level 4 as appropriate).

Level 4 — Supporting Information

Below the main philatelic material content is the supporting information section. Support information consists of items such as philatelic articles on the subject, historical and social background information, book and magazine references, a glossary of terms used, short biographies of important people or information on institutions associated with the subject, a bibliography, author credits, contact information, awards won, internet links, administrative information including *legal beagle* notices and a help page explaining how to use the study. The list goes on and on depending on your study's intended purpose.

You've read references watched slide shows and listened to experts and collectors present their knowledge during seminars at meetings and shows. You've formed a library of books, magazine and newspaper clippings, photocopies and notes. How much time did you spend digging out those references? How difficult was it to find them once

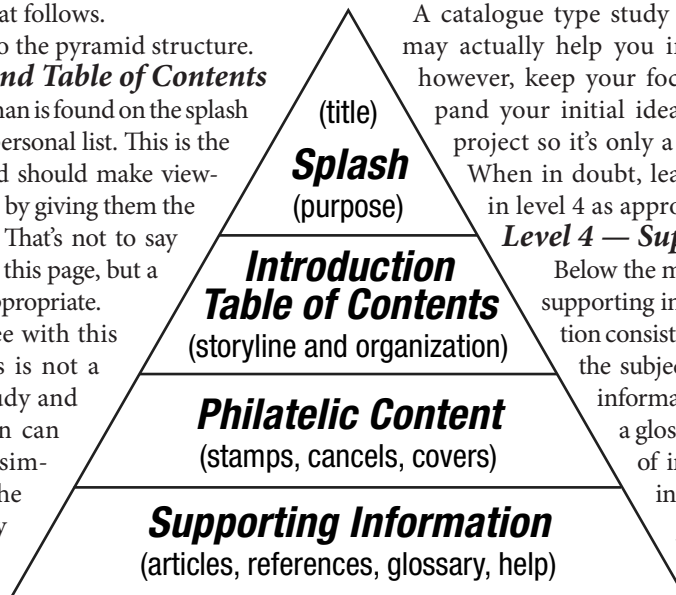
you knew they existed? How long does it take to find that little nugget of information you need right **now** in that library?

Including references in your digital study provides solid bedrock for it. Future specialists in your field will appreciate your efforts even if they don't know you. After all, we're only caretakers of this material and improving the state of the art is a duty as well as a joy in our hobby.

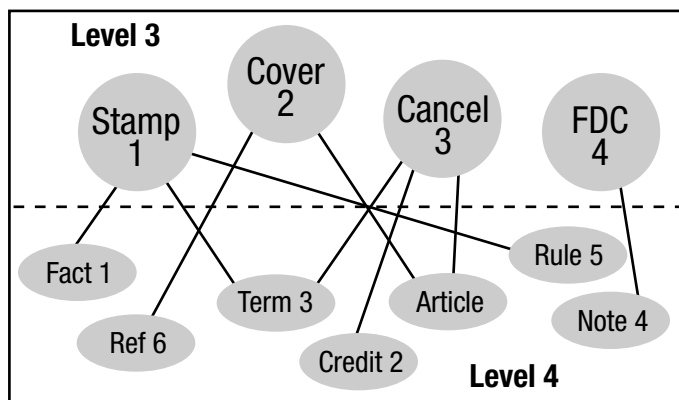
Doing It Your Way

Perspective is your unique spin on your little piece of the wide, wide world of philately. It's how you arrange your material and knowledge into the final presentation using a fresh angle only you can create. It's the realization of the dream, so stay as true to the dream as possible and you'll be satisfied with the result.

Continued on Page 18



Four level pyramid structure (sample materials for each level)



Level 3 (philatelic items) and Level 4 (support information) sample relationships

Digital Planning — Continued from Page 17

If you're doing this for the judges, and these days, digital philatelic studies are gaining a standing of their own, maybe you pay attention to the rules of philatelic literature judging on the APS Web site (STAMPS.ORG/DIRECTORIES/DIR_LIT/LITJUDGING.PDF). Additional resources for a DPS are the Mega-Event Digital Philatelic Study rules (WWW.ASDAONLINE.COM/INDEX.PHP?ID=65), and *Creating Digital References and Studies* (*THE PHILATELIC COMMUNICATOR*, Second Quarter 2007).

For the most part however, this is your personal creative exercise. Now is your chance. Organize your study in your fashion and get things done right!

Effort

A project will absorb as many hours as you're willing to put into it. If you're like me, time gets away from you and before you know it — geez is it time for dinner already? I now limit my sittings at the computer screen in terms of minutes and my eyes thank me for it. (I cheat a little as I don't limit the number of times I can sit there each day.) There are no rules that say I have to be on the computer every day, so I can build the study as suits me time wise.

That said, you'll likely put a reasonable amount of time into building your new study. At first it may appear to be an unending task and essentially, it could be, depending on what you wish to achieve — study or full blown philatelic reference. As I said earlier, choose your goal carefully so a useful result is possible. Any basic study can always be expanded by adding new discoveries to its content and depth to the support information making it ever more comprehensive.

Conclusion

The real payoff is in the organization of your data. You'll gain immediate access to the information, without looking through a book-

shelf, and as you continue adding, the smaller bits of data won't get lost. The effort will shine most brightly when you perform a search for a key word and let the document do the work for you.

A second and perhaps more personally beneficial payday occurs when someone you don't know sees your study and contacts you with information you've either been unsuccessful in finding or didn't know about. Sharing information is now possible with less effort than ever before. Digital documents are very portable and

quite easily transmitted anywhere in the world via a quick e-mail message or posting to a Web site.

How about sharing your information source with your friends, local club, specialty society, or even at a national convention as a public presentation? Helping others expand their knowledge is an honorable goal and perhaps a kindred heart may be found to boot.

The latest development on the DPS front is promotion of the medium at the ASDA Mega-Event in New York City (WWW.ASDAONLINE.COM). Participating in a competition may be an option for your newly minted study.

As you've read this far, you've completed a portion of the planning process discussed above. In the next article,

we'll discuss developing a 'formatting guide' in preparation for producing a DPS, so grab that notebook and start writing down those ideas.

Thanks

My sincere thanks to Alan Campbell and Richard Maisel for their continuing support in reviewing drafts of these articles.

About the Author

Francis Adams, a member of WU30, is a collector and exhibitor learning how to combine the hobby of philately and computer technology to produce digital exhibits and literature references for his interest areas (WWW.BONEANDSTONE.COM).



Philatelic items, background text and support graphic

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