



HISTORIC
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SCOTLAND

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DIGITAL DOCUMENTATION OF PICs AND COLLECTIONS GUIDANCE

Summary

Digital documentation involves 2D and 3D data capture and scanning, resulting in the creation of a corresponding digital asset. In heritage contexts this includes digital documentation of sites, monuments or collections objects.

Historic Environment Scotland (HES) has a duty of care to protect our properties in care (PICs) and the collections displayed at them and ensure the safety of those who visit. It is our policy to ensure that digital documentation operations are therefore:

- Carried out in compliance with HES best practice (see [Short Guide No 13, Applied Digital Documentation in the Historic Environment](#));
- Only carried out after appropriate assessment measures have been considered in line with the selection of suitable equipment and working practices;
- Carried out using planned safe systems of work, including arrangements for emergencies;
- Carried out only when personnel are appropriately trained and possibly supervised;
- Carried out in a manner which is, so far as is reasonably practicable, safe;
- Compliant in accordance with the latest data protection legislation and privacy laws;
- Requested via the submission of an application form in advance of operation.

Where necessary to prevent injury to any person or damage to sites, steps are taken to prevent, so far as is reasonably practicable, unauthorised operations on HES sites.

Permission for digital documentation

Anyone who wishes to undertake digital documentation at a property or of collections under the care of HES must first obtain prior consent. This includes, but is not limited to, individuals, commercial organisations, researchers.

Consent for digital documentation is dependent on the satisfaction of several requirements:

- An application form, including detailed method statement must be submitted to digitaldocumentation@hes.scot in advance of digital documentation. A notice period of up to 10 working days is required for consideration by relevant staff (or longer for more complicated requests).
- A site-specific Risk Assessment must be provided.

The documents provided will allow the HES Digital Documentation team, working closely with our Regional/District Conservation Architects, Regional Collections Managers, Visitor Operations Teams, UAV Pilot and other relevant staff, to make a well-informed decision about the potential digital documentation request. This process takes a considerable amount of time as each team can contribute any of their concerns/requested changes which will be discussed during the application process before formal permission can be given.

Factors considered

There are many factors that contribute to the decision of whether digital documentation can be permitted, such as:

- Methodology proposed. Including, but not restricted to:
 - proposed use of targets (adhesive targets are not permitted under any circumstances, tripod mounted targets inserted into the ground will be considered).
 - any requests to handle Collections items
 - any request that affects the fabric and/or environment of the Properties in Care (which may then be subject to [Scheduled Monument Consent](#) application)
 - confirmation on digital removal of members of public/staff captured during digital documentation to comply with **data protection legislation**.
- Planned or unplanned works being carried out at the site.
- Events at the site that may prevent digital documentation taking place on the requested date or time.
- Monitoring and supervising digital documentation may be necessary to ensure that risk control measures are used and are effective, and therefore permission may depend on staff availability (and may incur a staffing fee due to working additional hours).

Digital documentation methodologies

This policy covers, but is not limited to, the following digital documentation methodologies:

- Laser scanning (all forms including terrestrial, close-range, triangulation, mobile/SLAM)
- Structured light scanning
- Photogrammetry/structure from motion (where it requires excessive equipment, e.g. full-size tripod(s), lighting stand(s), electric cables)
- Reflectance Transformation Imaging (RTI)

For [UAV photogrammetry/structure from motion](#) requests, please refer to our [UAV Policy for guidance](#) on the separate application procedure.

For [personal \(non-professional\) photogrammetry/structure from motion](#), small, handheld photographic equipment doesn't need permission as long as the process is entirely non-contact and no targets are used. No handling of Collections items is permitted, and the process must have no effect on the fabric and/or environment of Properties in Care.

Digital documentation outside of visitor opening hours

If a site under the care of HES has set opening hours, it may not be possible to carry out digital documentation while these properties are open to the public. This is in order to protect visitor safety and security and ensure their enjoyment of the site is not impeded. We would not facilitate any digital documentation activities that would have the potential to cause frustration or be detrimental to the visitor experience at our sites.

In instances where digital documentation is not permitted while our sites are open to the public, HES may be able to accommodate this activity before or after site opening hours. This will be organised with the sites upon completion of the digital documentation application form and the correct documents provided. As mentioned above, out of hours activity may incur a staffing fee for the additional time worked dependent on the site and the necessity of staff supervision.

Collections on loan

Where Collections are on loan to HES, any requests to undertake digital documentation will require additional consideration and extends the notice period to at least three weeks or more. This includes, but is not limited to:

- Duff House Collections
- Seafield Collection, Fort George
- Particular Collections at Skara Brae
- Particular Collections at Urquhart Castle

Failure to comply

Site staff reserve the right to ask those who wish to undertake digital documentation outside of visitor opening hours and on property in the care of HES to provide evidence of consent. This will take the form of a signed agreement provided by the HES Digital Documentation team following

satisfaction of all steps of the application process. If staff are supervising the approved digital documentation, they also have the right to ask that the digital documentation is amended if they feel it is not following safe practices.

Any unauthorised digital documentation will be brought to an end as safely and as practicably as possible by a member of onsite staff speaking with the digital documentation operator(s). The operator(s) will be advised of our digital documentation guidance and can contact digitaldocumentation@hes.scot to begin the application process.