# Queens Museum Guide for Cataloging Collections in Past Perfect

Developed by Annie Tummino for the Queens Museum
CLIR Project Archivist for World's Fair Collections, 2014

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# Overview

**Workflow:**
For backlog materials, steps 1-3 may all need to be completed. Moving forward, entries for contacts and accessions (steps 1-2) should be created in "real time" as contacts and acquisitions are made. Detailed cataloging of individual items (step 3) may be undertaken when funds or staff members are available.

**Technical Specifications:**
At the time of the writing of this Guide, the Museum is using **Past Perfect 4.0**. In order accommodate off-site data entry, the database is not installed on the network. Instead, the **Scatter/Gather** utility must be used to save data to multiple workstations.

**Standards**: For the CLIR project, all metadata is mapped to the Dublin Core metadata scheme for ingest into the Queens Library system (see appendix). CCO (Cataloging Cultural Materials) has been consulted for data entry instructions. To ensure consistency, authorities are used whenever possible including Getty's Art & Architecture Thesaurus and Library of Congress Authorities.

**Step 1. Enter your donors as contacts:** The Contacts database will act as an authority file for accessions.

**Step 2. Enter your accession records:** Each accession record represents a single donation, which is defined as one or more items donated at the same time by the same donor.

**Step 3. Enter your catalog records**: Catalog records contain detailed descriptive information for individual objects. Multiple catalog records may be associated with a single accession record.

**Step 4. Back-Up & Scatter/Gather:** Very important to keep information consistent across workstations and to ensure data is not lost!

**Accession numbers are comprised of two sets of numbers:** the year of the accession and the gift number e.g. 2014.3 would be assigned for the third gift received by the Museum in 2014.

**Objects IDs are comprised of three sets of numbers:** the year of accession, the gift number and the item number. For example, 2014.3.1, 2014.3.2, and so on for each item that comprises the accession.

**Object Names**: Past Perfect 4.0 comes with the option of using 8,500 Chenhall approved names from *The Revised Nomenclature for Museum Cataloging*. However, the WF Archives team has instead decided to use Getty's Art & Architecture Thesaurus (AAT), the preferred archives standard, for Object Names. The "Search AAT online" button makes integrating AAT terms into the authority file easy.

# Step 1: Enter donors as contacts

Choose Contacts from the main menu

First check to see if the contact is already in the database. There are two ways to do this:
- Click the "find" button on the top menu, search by first or last name
- Click the "browse" button on the top menu to see the whole list in alpha order

If the contact is already in the database, skip to Step 2: Enter your accession records.

To enter a new contact:

Click "add" on the top menu.

Enter first name and last name. Optionally, you may enter a salutation or other data. If the donor is an organization or corporate entity, use the Company field.

Click "add". This will take you to the full screen for the contact record.

If available: Enter the mailing address, phone number(s), email and/or website of the contact.

Optional: Utilize the notes box (far right) to provide information about the donor. Such information could be utilized for future contact with the donor and/or to provide context for curators or archivists working with the collection in the future.

Hit **save** at top left to complete the entry.

**Donation by multiple people:**
> Create a separate contact record for each person. In Step 2: Enter Accession records, multiple donors can be related to the accession.

**Spouses**
> You may want to create a separate record for each individual and link them by typing their unique spouse contact Id# in the Spouse/Id# field.

# Step 2: Enter your accession records

Choose Accession from the main menu

Click "add" from top menu.

Enter the accession number. [Reminder: this is the first two facets of the identification system, representing the year and gift number of the accession e.g. 2014.3]

Click "Select Donor from Contacts File". Find the donor name and double click.

Below the "Select Donor from Contacts File" button, there are many options for pre-filling fields with specific information - **leave all options unchecked**.

Click "add". This will take you to the full screen for the accession record.

Received As- choose the best choice from the drop-down menu (gift, purchase, etc.)

**If the donation was made by multiple people:** In top right corner select "Add/View" additional donors and select name from authority file.

**Notes field:** For CLIR Project use F key shortcut "Entered as part of World's Fair CLIR grant, 2014."

**Brief description of accession box:** Enter brief description of gift as a whole – e.g. extent, topic(s) and object types represented in the gift.

*For CLIR grant and backlog:*
Click **save**, record is complete.

*For Registrar / New Accessions:*

Utilize these fields as applicable:

- Received by, Accession by, and Price/Value
- Accession activities
- Restrictions

Click save, then click **Add Catalog Records**.

[**Background:** Best practice is to add catalog records as part of the accession process. However, these are a *minimal* way to identify each object and should not be confused with *full* catalog records. Full detailed records can be created as funding or resources are available.]

From the top menu, select which catalog to add the record to.

**Per CLIR project guidelines:**

- Use Objects for all 3d ephemera and artworks
- Use Photographs for all photographic mediums (prints, slides, negatives, etc.)
- Use Library for all widely distributed, published paper based publications and ephemera (books, serials, pamphlets, maps, leaflets, etc.)
- Use Archive for personal papers, correspondence, unpublished manuscripts, and administrative records.

Because these records are minimal, I recommend using only the following fields:***

- **Collection:** If it's a world fair object, click f7 on keyboard to access authority file and select either 1939 New York World's Fair or 1964 New York World's Fair.
- **Object ID:** Enter the identification number consisting of the year the item was accessioned, the gift number and the item number - for example, 2014.3.1.
- **Object Name:** Click F7 to select from authority file of most common object types. For CLIR project all terms taken from Getty's Art & Architecture Thesaurus (rather than the built-in nomenclature).
- **Temp Loc or Home Loc:** To track where the item is being stored, click on F7 for authority file options and select from menu.
- **Description/Summary/Scope&Content (depending on catalog):** Briefly describe the item. Information such as creator, dates, etc. may be entered here as free text (later during full cataloging such info will be properly entered using authority files/standards).
- **Catalog Date & Catalog By:** Press F8 for to auto-fill with today's date; Press F8 to select your name from authority list
- **Condition:** Choose from drop-down menu and enter today's date your name as above
- **Notes:** Optionally, enter any additional administrative information.

Click **Add This Item** to complete the entry.

***<span>**To save time, you may want to use "fill with default data" function.** For example, if you are accessioning 100 5x7 photos taken in 1939, you can pre-fill the object name, print size, and date fields. However, if a range of object types are being accessioned, using this function may cause confusion.</span>

**To fully catalog the objects, follow the instructions in Step 3: Enter your catalog records.**

# Step 3: Cataloging the Objects - Overview

        3A: Objects Catalog
- 3d Objects
- Artworks

        3B: Photos Catalog
- Photographs (all mediums)

        3C: Library Catalog:
- Published and/or widely distributed paper-based materials (books, pamphlets, leaflets, menus, postcards, maps)

        3D: Archives Catalog
- Administrative records (internal)
- Unpublished and/or personal paper-based materials (drafts, manuscripts, correspondence, diaries)
- Objects cataloged as a group (Collection, Series, Sub-Series, folder)

**Required** means that the field should always be populated

**Required if known** means that the field should be populated if the information is available from the object itself. If the information is not readily available, outside research is not necessary- simply leave blank.

**Optional** means that the field may be utilized when useful and/or when the cataloger feels qualified to populate the field.

# Step 3A: Cataloging items in the Objects Catalog

Use this catalog for all 3-dimensional objects and artworks.

Start by Selecting the Objects catalog from the main menu

**If a minimal record has already been created for the object**
- Use the Instant Find to search for the Object ID number. Once the record is open, follow the instructions below, skipping any fields that have already been correctly filled in.  For legacy records, data may need to be cleaned up or re-formatted to fit current standards.

**To create a new record**

Select "add" from top menu; a dialog box will pop up. At bottom of screen:
- Pre-fill Object ID with Accession# should be checked
- Fill with blank data should be checked (Using "fill with default/current data" can save time when processing a group of like objects, but can also cause confusion/mistakes – consult with archivist before utilizing this option)

**Accession # [Required]:** Year of the accession and gift number, e.g. 2014.3.
- If an accession record has already been created for this gift, the Source field will automatically populate.

**Object ID [Required]:**  Year of accession, gift number and item number, e.g. 2014.3.1

**Object Name [Required]:** Click "search authority file" and select best option. If dialog box pops up, click "add object name to Lexicon"
- All terms are from [AAT](). If you don't find a good match, select "search AAT online" button for alternatives and consult with archivist to modify list.

Click "Add" – this will take you to the full catalog record.

**Collection [required for World's Fair items]:** Click F7 and select either 1964/1965 New York World's Fair or 1939/1940 New York World's Fair

**Other#: [Required for CLIR Grant]:** Type CLIR into this field (Very important for grant tracking!!)

**Home Location [Required]** For CLIR Project we will use the Finding Aid scheme (Series/Subseries/Folder) until container & shelf system is created.

**Date [required]:** Enter the year the object was created.

- If the date is unknown input a circa date using the ca. YYYY format.
- If a more specific date is known (i.e. the month and/or day) this will become part of the description.

**Catalog Date [required]:** Press F8 to enter today's date

**Catalogued by [required]:** Click F7 and select your name from the list

**Description [required]:** Enter information clearly and concisely in complete sentences. Capture points not already described in other elements. Avoid abbreviations. When a specific date is known (e.g. February 12, 2008) include it here, since we are only using the date field for years.

**Dimensions [required]:** Select in/oz. and enter measurements in appropriate fields:
- Express measurements for primarily two-dimensional work as height by width
- Express measurements for a three-dimensional work as height by width by depth
- For irregularly shaped works, measure the greatest dimensions

**Dimension details [optional]:** Clarifications regarding measurements of irregular objects.

*Sub-Screen View:* Start on Art for artworks and History for 3d ephemera. Fields from both screens may be used for one object – it is fine to switch back and forth. I have indicated below when a field is only available on one or the other screen.

**Place of Origin [optional / history screen]:** Use when known or significant. Click F7 to select from authority file.
- If location is not yet on list use excel sheet to propose term from LOC Authority http://authorities.loc.gov/ for archivist review.

**Material [optional]:** Click F7 to select option(s) from authority file.
- This authority file is pre-loaded with terms by PP. Proposals for new terms can be taken from AAT http://www.getty.edu/research/tools/vocabularies/aat/ for archivist review.

**Medium [optional / art screen]:** Click F7 to select option(s) from authority file.
- This authority file is pre-loaded with terms by PP. Proposals for new terms can be taken from AAT http://www.getty.edu/research/tools/vocabularies/aat/ for archivist review.

**Title [required]:** You may take the title from the object itself or supply a title.
- For titles derived from authoritative sources, follow the capitalization and punctuation of the source.

- For constructed titles in English capitalize the first word and all nouns, pronouns, verbs, adverbs adjectives and subordinate conjunctions. Use lowercase for articles, coordinate conjunctions and prepositions. Avoid starting title with articles "A", "An" or "The".

**Artist [required]:** Press F7 to select from authority list. Select "unknown" as applicable. (Many World's Fair objects are not made by "artists" but we are using in more generic sense of "creator.")
- If name is not yet on list use excel sheet to propose term for archivist review.
- Search LOC Authority http://authorities.loc.gov/ for names; if person/entity is not publicly known, propose LOC style format: last name, first name, born date-decease date.

**Artist 2, Artist 3 [optional]:** See Artist for instructions

**Maker's mark notes: [optional]:** Use this field to record and describe any manufacture's or maker's mark that appears on an object.

**Provenance [optional]:** Additional information regarding history of custody or ownership.

**Legal [required for CLIR grant]:** Use F key to insert ownership language for Queens Library database.
- This field may be used differently in the future.

**Related [optional]:** Use for multi-part items (like a cup and saucer). Click "Add Relation" button on bottom right of screen. Select correct catalog; input the object ID of the related object; hit tab. Then click "add this relation."

**Condition [required]:** Choose best option from drop-down menu. If item is not in good or excellent condition, explain in "General Condition Notes". Add date and your name using F key shortcuts.

**People/Classification/Subjects/Search Terms [required]:**
- Use to record *topic(s)* of the resource. *Do not use for object types or creators.*
- Subjects: Click on F7 to access authority file and select best options.
  - Past Perfect 4.0 is pre-loaded with Library of Congress Thesaurus for Graphical Material-Subjects (TGM I), comprised of general terms for activities, objects, and types of people, events, and places. The CLIR grant's archival team will supplement TGM I with proper nouns and conceptual terms from LOC authorities. Fellows should propose additions in excel sheet for archivist review.
- Search Terms: Click on F7 to access authority file and select best options
  - The Search terms authority contains localized vocabulary not available in the Library of Congress. CLIR Fellows should propose additions in excel sheet for archivist review.
  - For World's Fair Collections, search terms will be used to classify zones/areas of the Fair and other WF related terminologies not in the LOC.

- Do not use the People or Classification fields- all terms will be recorded in either Subjects or Search Terms.

**Notes [optional]:** Any additional internal or administrative information not already captured.

# Step 3B: Cataloging items in the Photos Catalog

Use this catalog for all photographic mediums.

Start by Selecting the Photos catalog from the main menu

**If a minimal record has already been created for the object**
- Use the Instant Find to search for the Object ID number. Once the record is open, follow the instructions below, skipping any fields that have already been correctly filled in. For legacy records, data may need to be cleaned up or re-formatted to fit current standards.

**To create a new record**

Select "add" from top menu; a dialog box will pop up. At bottom of screen:
- Pre-fill Object ID with Accession# should be checked
- Fill with blank data should be checked (Using "fill with default/current data" can save time when processing a group of like objects, but can also cause confusion/mistakes – consult with archivist before utilizing this option)

**Accession # [Required]:** Year of the accession and gift number, e.g. 2014.3.
- If an accession record has already been created for this gift, the Source field will automatically populate.

**Object ID [Required]:** Year of accession, gift number and item number, e.g. 2014.3.1

**Object Name [Required]:** Click "search authority file" and select best option. If dialog box pops up, click "add object name to Lexicon"
- All terms are from AAT. If you don't find a good match, select "search AAT online" button for alternatives and consult with archivist to modify list.

Click "Add" – this will take you to the full catalog record.

**Collection [required for World's Fair items]:** Click F7 and select either 1964/1965 New York World's Fair or 1939/1940 New York World's Fair

**Other#: [Required for CLIR Grant]:** Type CLIR into this field (Very important for grant tracking!!)

**Home Location [Required]** For CLIR Project we will use the Finding Aid scheme (Series/Subseries/Folder) until container & shelf system is created.

**Description [required]:** Enter information clearly and concisely in complete sentences. Capture points not already described in other elements. Avoid abbreviations. When a specific date is known (e.g. February 12, 2008) include it here, since the date field only deals in years.

**Date [required]:** Enter the year the object was created.
- If the date is unknown input a circa date using the ca. YYYY format.
- If a more specific date is known (i.e. the month and/or day) this will become part of the description.

**Catalog Date [required]:** Press F8 to enter today's date

**Catalogued by [required]:** Click F7 and select your name from the list

**Print/Image Size [required]:** Press F7 to access authority file of standard photo measurements – remember, height and width depend on the view depicted.
- If not in authority enter free text in same format e.g. H: 11 x W: 8 ½ inches. If working with a large quantity of images with size not yet in authority, archivist can modify.

**Dimension details [optional]:** Any clarifications regarding measurements.

**Title [required]:** When known, use the title supplied by the photographer/caption. When supplying a title put in [brackets].
- For titles derived from authoritative sources, follow the capitalization and punctuation of the source.
- For constructed titles in English capitalize the first word and all nouns, pronouns, verbs, adverbs adjectives and subordinate conjunctions. Use lowercase for articles, coordinate conjunctions and prepositions. Avoid starting title with articles "A", "An" or "The".

**Photographer [required]:** Press F7 to select from authority list. Select "unknown" as applicable.
- If name is not yet on list use excel sheet to propose term for archivist review.
- Search LOC Authority http://authorities.loc.gov/ for names; if person/entity is not publicly known, propose LOC style format: last name, first name, born date-decease date.

**Processing Method [optional]:** Click F7 to select option(s) from authority file.
- PP uses "processing method" for more specific "mediums" like gelatin silver print, cyanotypes, etc - use only as information/expertise is available. The Object Name field will provide sufficient broader terms (prints, slides, etc.)
- These terms were largely pre-loaded by Past Perfect but we modified to fit AAT format.

**Provenance [optional]:** Additional information regarding history of custody or ownership.

**Legal [required for CLIR grant]:** Use F key to insert ownership language for Queens Library database.
- This field may be used differently in the future.

**Condition [required]:** Choose best option from drop-down menu. If item is not in good or excellent condition, explain in "General Condition Notes". Add date and your name using F key shortcuts.

**People/Classification/Subjects/Search Terms [required]:**
- Use to record *topic(s)* of the resource. *Do not use for object types or creators.*
- Subjects: Click on F7 to access authority file and select best options.
    - Past Perfect 4.0 is pre-loaded with Library of Congress Thesaurus for Graphical Material-Subjects ([TGM I](#)), comprised of general terms for activities, objects, and types of people, events, and places. The CLIR grant's archival team will supplement TGM I with proper nouns and conceptual terms from [LOC authorities](#). Fellows should propose additions in excel sheet for archivist review.
- Search Terms: Click on F7 to access authority file and select best options
    - The Search terms authority contains localized vocabulary not available in the Library of Congress. CLIR Fellows should propose additions in excel sheet for archivist review.
    - For World's Fair Collections, search terms will be used to classify zones/areas of the Fair and other WF related terminologies not in the LOC.
- Do not use the People or Classification fields- all terms will be recorded in either Subjects or Search Terms.

**Notes [optional]:** Any additional internal or administrative information not already captured.

# Step 3C: Cataloging items in the Library Catalog

Use this catalog for published and/or widely distributed paper-based materials

Start by Selecting the Library catalog from the main menu

**If a minimal record has already been created for the object**
- Use the Instant Find to search for the Object ID number. Once the record is open, follow the instructions below, skipping any fields that have already been correctly filled in.  For legacy records, data may need to be cleaned up or re-formatted to fit current standards.

**To create a new record**

Select "add" from top menu; a dialog box will pop up. At bottom of screen:
- Pre-fill Object ID with Accession# should be checked
- Fill with blank data should be checked (Using "fill with default/current data" can save time when processing a group of like objects, but can also cause confusion/mistakes – consult with archivist before utilizing this option)

**Accession # [Required]:** Year of the accession and gift number, e.g. 2014.3.
- If an accession record has already been created for this gift, the Source field will automatically populate.

**Object ID [Required]:**  Year of accession, gift number and item number, e.g. 2014.3.1

**Object Name [Required]:** Click "search authority file" and select best option. If dialog box pops up, click "add object name to Lexicon"
- All terms are from AAT. If you don't find a good match, select "search AAT online" for alternatives. Consult with archivist regarding unusual object types.

Click "Add" – this will take you to the full catalog record.

**Collection [required for World's Fair items]:** Click F7 and select either 1964/1965 New York World's Fair or  1939/1940 New York World's Fair

**Other#: [Required for CLIR Grant]:** Type CLIR into this field (Very important for grant tracking!!)

**Home Location [Required]** For CLIR Project we will use the Finding Aid scheme (Series/Subseries/Folder) until container & shelf system is created.

**Summary [required- same as Description in other catalogs]:** Enter information clearly and concisely in complete sentences. Capture points not already described in other elements. Avoid abbreviations. When a specific date is known (e.g. February 12, 2008) include it here, since the date field only deals in years.

**Publish Date [required]:** Enter the year of publication
- If the date is unknown input a circa date using the ca. YYYY format.
- If a more specific date is known (i.e. the month and/or day) this will become part of the description.

**Catalog Date [required]:** Press F8 to enter today's date

**Catalogued by [required]:** Click F7 and select your name from the list

**Physical description [required]:** Enter as free text in the following format.
  - o H: 11 x W: 8 ½ inches
  - o H: 11 x W: 8 ½ inches, 10 pages
  - o H: 11 x W: 8 ½ inches, [10 pages]
- Record pagination for multi-page docs only; use brackets if the count comes from the cataloger.
- For irregularly shaped works, measure the greatest dimensions
- Inches may be expressed as whole numbers and/or fractions. If feet are recorded, record feet and inches, rather than decimal fractions of feet.

**ISBN [optional]**: If available- primarily for non-rare books

**Language [required]:** Select from drop-down menu of LOC codes (abbreviations)
- To modify go into Setup/Authority files/Combo Boxes (right column)/Language

**Author [required]** Press F7 to select from authority list. Select "unknown" as applicable. (We are using this field in the more generic sense of the "creator" of the object)
- If name is not yet on list use excel sheet to propose term for archivist review.
- Search LOC Authority http://authorities.loc.gov/ for names; if person/entity is not publicly known, propose LOC style format: last name, first name, born date-decease date.

**Title [required]:** When possible, take the title from the object itself. If necessary supply a title.
- For titles derived from authoritative sources, follow the capitalization and punctuation of the source.
- For constructed titles in English capitalize the first word and all nouns, pronouns, verbs, adverbs adjectives and subordinate conjunctions. Use lowercase for articles, coordinate conjunctions and prepositions.  Avoid starting title with articles "A", "An" or "The".

**Publisher [required if known]**: Press F7 to select from authority list. If the publisher is not already on the list add to the authority and then select (utilize LOC authorities for consistency).

**Publication place [required if known]**: Press F7 to select from authority list.
- If location is not yet on list use excel sheet to propose term from LOC Authority http://authorities.loc.gov/ for archivist review.

**Author added entries [optional]:** See Author for instructions
- We are using this field in the more generic sense of the "creator(s)" of the object.

**Legal [required for CLIR grant]:** Use F key to insert ownership language for Queens Library database.
- This field may be used differently in the future.

**Related [optional]:** Use for multi-part items (like a cup and saucer). Click "Add Relation" button on bottom right of screen. Select correct catalog; input the object ID of the related object; hit tab. Then click "add this relation."

**Condition [required]:** Choose best option from drop-down menu. If item is not in good or excellent condition, explain in "General Condition Notes". Add date and your name using F key shortcuts.

**People/Classification/Subjects/Search Terms [required]:**
- Use to record *topic(s)* of the resource. *Do not use for object types or creators.*
- Subjects: Click on F7 to access authority file and select best options.
    - Past Perfect 4.0 is pre-loaded with Library of Congress Thesaurus for Graphical Material-Subjects (TGM I), comprised of general terms for activities, objects, and types of people, events, and places. The CLIR grant's archival team will supplement TGM I with proper nouns and conceptual terms from LOC authorities. Fellows should propose additions in excel sheet for archivist review.
- Search Terms: Click on F7 to access authority file and select best options
    - The Search terms authority contains localized vocabulary not available in the Library of Congress. CLIR Fellows should propose additions in excel sheet for archivist review.
    - For World's Fair Collections, search terms will be used to classify zones/areas of the Fair and other WF related terminologies not in the LOC.
- Do not use the People or Classification fields- all terms will be recorded in either Subjects or Search Terms.

**Notes [optional]:** Any additional internal or administrative information not already captured.

# Step 3C: Cataloging items in the Archives Catalog

Use this catalog for administrative records; unpublished & personal materials; or for cataloging a group of materials as a single record (collection, series, folder, etc.)

Start by Selecting the Archives catalog from the main menu

**If a minimal record has already been created for the object**
- Use the Instant Find to search for the Object ID number. Once the record is open, follow the instructions below, skipping any fields that have already been correctly filled in.  For legacy records, data may need to be cleaned up or re-formatted to fit current standards.

**To create a new record**

Select "add" from top menu; a dialog box will pop up. At bottom of screen:
- Pre-fill Object ID with Accession# should be checked
- Fill with blank data should be checked (Using "fill with default/current data" can save time when processing a group of like objects, but can also cause confusion/mistakes – consult with archivist before utilizing this option)

**Accession # [Required]:** Year of the accession and gift number, e.g. 2014.3.
- If an accession record has already been created for this gift, the Source field will automatically populate.

**Object ID [Required]:**  Year of accession, gift number and item number, e.g. 2014.3.1

**Object Name [Required]:** Click "search authority file" and select best option. If dialog box pops up, click "add object name to Lexicon"
- All terms are from AAT. If you don't find a good match, select "search AAT online" button for alternatives and consult with archivist to modify list.

Click "Add" – this will take you to the full catalog record.

**Collection [required for World's Fair items]:** Click F7 and select either 1964/1965 New York World's Fair or 1939/1940 New York World's Fair

**Other#: [Required for CLIR Grant]:** Type CLIR into this field (Very important for grant tracking!!)

**Home Location [Required]** For CLIR Project we will use the Finding Aid scheme (Series/Subseries/Folder) until container & shelf system is created.

**Date [required]:** Enter the object was created

- If the date is unknown input a circa date using the ca. YYYY format.
- If a more specific date is known (i.e. the month and/or day) this will become part of the description.

**Catalog Date [required]:** Press F8 to enter today's date

**Catalogued by [required]:** Click F7 and select your name from the list

<span style="color:red">**Sub-Screen:** There are options for Archive, Map, Music Collection and Oral History. For the purpose of the CLIR World's Fair project, we are simply using **Archive**. The other screens provide additional tailored fields but are unnecessary for our purposes and create complications for exporting data to the Queens Library database.</span>

**Scope&Content/Abstract [required- same as Description in other catalogs]:** Enter information clearly and concisely in complete sentences. Capture points not already described in other elements. Avoid abbreviations. When a specific date is known (e.g. February 12, 2008) include it here, since the date field only deals in years.

**Title [required]:** When possible, take the title from the object itself. If needed, supply a title.

- For titles derived from authoritative sources, follow the capitalization and punctuation of the source.
- For constructed titles in English capitalize the first word and all nouns, pronouns, verbs, adverbs adjectives and subordinate conjunctions. Use lowercase for articles, coordinate conjunctions and prepositions.  Avoid starting title with articles "A", "An" or "The".

**Extent and Medium [required]:** For item-level, enter as free text in the following format:
  - H: 11 x W: 8 ½ inches
  - H: 11 x W: 8 ½ inches, 10 pages
  - H: 11 x W: 8 ½ inches, [10 pages]
- Record pagination for multi-page docs only; use brackets if the count comes from the cataloger.
- For irregularly shaped works, measure the greatest dimensions
- Inches may be expressed as whole numbers and/or fractions. If feet are recorded, record feet and inches, rather than decimal fractions of feet.
- For groups of material instead of dimensions describe number of items, containers, etc.

**Name of Creator [required / in context tab]:** Press F7 to select from authority list. Select "unknown" as applicable.

- If name is not yet on list, use excel sheet to propose term for archivist review.

- Search LOC Authority http://authorities.loc.gov/ for names; if person/entity is not publicly known, propose LOC style format: last name, first name, born date-decease date.

**Other Creators [optional / in context tab]:** Unfortunately in PP 4.0 this field is not connected to the creator authority file (PP staff said they might modify this in future updates). Enter names separated by commas using the same conventions as the creator authority file as above.

**Language of Material [required / in Conditions and Access of Use Tab]:** Enter the language of the resource  - Queens Library prefers LOC codes – enter eng for English

**Legal [required for CLIR grant]:** Use F key to insert ownership language for Queens Library database.
- This field may be used differently in the future.

**Related [optional]:** Use for multi-part items (like a cup and saucer). Click "Add Relation" button on bottom right of screen. Select correct catalog; input the object ID of the related object; hit tab. Then click "add this relation."

**Condition [required]:** Choose best option from drop-down menu. If item is not in good or excellent condition, explain in "General Condition Notes". Add date and your name using F key shortcuts.

**People/Classification/Subjects/Search Terms [required]:**
- Use to record *topic(s)* of the resource. *Do not use for object types or creators.*
- Subjects: Click on F7 to access authority file and select best options.
  - Past Perfect 4.0 is pre-loaded with Library of Congress Thesaurus for Graphical Material- Subjects (TGM I), comprised of general terms for activities, objects, and types of people, events, and places. The CLIR grant's archival team will supplement TGM I with proper nouns and conceptual terms from LOC authorities. Fellows should propose additions in excel sheet for archivist review.
- Search Terms: Click on F7 to access authority file and select best options
  - The Search terms authority contains localized vocabulary not available in the Library of Congress. CLIR Fellows should propose additions in excel sheet for archivist review.
  - For World's Fair Collections, search terms will be used to classify zones/areas of the Fair and other WF related terminologies not in the LOC.
- Do not use the People or Classification fields- all terms will be recorded in either Subjects or Search Terms.

**Notes [optional]:** Any additional internal or administrative information not already captured.

# Checklist / Cheat Sheet

**Required Fields**

- **Collection [required for World's Fair items]:** authority file / 1939 or 1964
- **Object ID:** e.g. 2014.3.1
- **Other#:** CLIR **Very important for grant tracking!!**
- **Accession #:** e.g. 2014.3
- **Home Location** Finding Aid scheme
- **Object Name:** authority file / AAT terms only
- **Date :** YYYY or ca. YYYY
- **Catalog Date :** F8 / today's date
- **Catalogued by:** authority file / your name
- **Description/Summary/Abstract :** Concise/ complete sentences / specific dates
- **Dimensions/Physical description/Image Size/Extent :** in  template e.g.
    - H: 11 x W: 8 ½ inches
    - H: 11 x W: 8 ½ inches, 10 pages
    - H: 11 x W: 8 ½ inches, [10 pages]
- **Language [Archives/Library]:** QL uses the [LOC codes](LOC codes) (abbreviations)
- **Title :** Take from object itself; if  needed supply [in brackets for photos and artworks]
- **Creator/Author/Photographer/Artist**  authority list / suggest additions from LOC or in LOC style. Use unknown as necessary for photos.
- **Legal:** F key to insert language
- **Condition :** drop-down menu
- **Subjects:** authority file / suggest additions from LOC
- **Search Terms:** authority file of local terms / primarily for Fair Areas & Zones

**Optional or As Available Fields**

- **Processing Method [Photos]**: authority file / e.g. gelatin silver print
- **Medium, Material [Objects]**: authority files
- **Publisher [library]**: use LOC names
- **Publication place/ Place of Origin [Library and Objects]**: authority list / suggest additions from LOC
- **Related [Objects]:** For multi-part items (like a cup and saucer).
- **Notes [optional]:** Any additional internal or administrative information not already captured.

# Step 4: Scatter/Gather and Back-Up

Whenever you exit PastPerfect choose "Back Up To Hard Drive Now".

**Always allot time for complete scatter/gather and back-up procedures at the end of each day.**

**<span style="color:red">Background</span>**:

**Scatter and Gather are intended for use by museums that enter data on two or more computers not connected by a network.** Data from one computer is "scattered", or placed, onto transfer media which is taken to the second computer where it is "gathered" or loaded. QM chose this option due to staff working offsite. In order to connect Past Perfect to the network in the future, an upgrade would need to be purchased.

Here we assume that staff members are working on laptops where they will "scatter" or place the data entered onto a flash drive and "gather" or load it onto the master computer. They will also back-up to an external drive, which is necessary best practice for ensuring data is not lost.

**Scatter on laptop:**
1. Plug a **BLANK** flash drive into the USB port
2. Select Utilities from main menu
3. Choose Scatter Data
4. Choose High Capacity Removable Disc
5. Data Types to Scatter: Don't check digital images or multi-media files, as these are not applicable to this project
6. Press Start Transfer
7. Exit PP and back-up to hard drive as usual

**Gather on master computer:**
1. Before loading the data on the second (gather) computer you need to Reindex and Backup. **This is an important step that should not be skipped**.
2. When you reindex: The bottom three menu options are by default not checked. Make sure to check "Rebuild Catalogs" – the other two (keywords and spellings) can remain unchecked.
3. Select Utilities from main menu
4. Choose Gather Data
5. Choose the drive that matches where the flash drive is showing up in My Computer. On master computer, it should be High Capacity Removable Disc
6. On left side, select Load all new records, images & multi-media (this should be default setting)
7. On right side, select Replace existing record with scatter record when scatter record change date is newer (this should be default setting)
8. Transfer deletions – If box is checked, records that have been deleted on the scatter computer will be marked for deletion on the gather computer.
9. Press Prepare to Load
10. Press Load Data Now
11. Reindex to complete the process. Remember to check "Rebuild Catalogs".

**Back-Up to external hard drive:**
1. Plug-in the hard drive (one wire to electrical outlet, the other to USB)
2. In Past Perfect under Back-Up options select Back-Up Data, Images and Multimedia to Removable Drive
3. Back-Up Drive and Folder: Make sure the correct drive is showing up in box at top right
4. Start Back-Up
5. Exit
6. Put hard drive away for security

# Crosswalk – Past Perfect Fields to Dublin Core

| Dublin Core Elements | Past Perfect Object Catalog Fields | Past Perfect Photo Catalog Fields | Past Perfect Library Catalog Fields | Past Perfect Archives Catalog Fields |
|---|---|---|---|---|
| Type | Object name | Object Name | Object Name | Object name |
| Format | Dimensions, Material, Medium | Print Size, Dimension Details, Medium, Processing Method | Physical Description | Extent and medium of the unit of description |
| Title | Title | Title | Title | Title |
| Description | Description | Description | Summary | Scope and Content/Abstract |
| Subject | Subjects, Search terms | Subjects, Search terms | Subjects, Search terms | Subjects, Search terms |
| Creator | Artist | Photographer | Author | Creator |
| Contributor | Artist 2, Artist 3 | n/a | Author added entry | Other creators |
| Publisher | n/a | n/a | Publisher | Publisher |
| Date | Date | Date | Publish date | Date |
| Identifier | Object Id | Object Id | Object Id | Object Id |
| Source | Your institution | Your institution | Your institution | Your institution |
| Relation | Collection, Related objects | Collection, Related objects | Collection, Related objects | Collection, Related objects |
| Language | n/a | n/a | Language | Language |
| Coverage | Place of origin | n/a | Pub place | Pub place |
| Rights | Legal Status | Legal Status | Legal Status | Legal Status |