

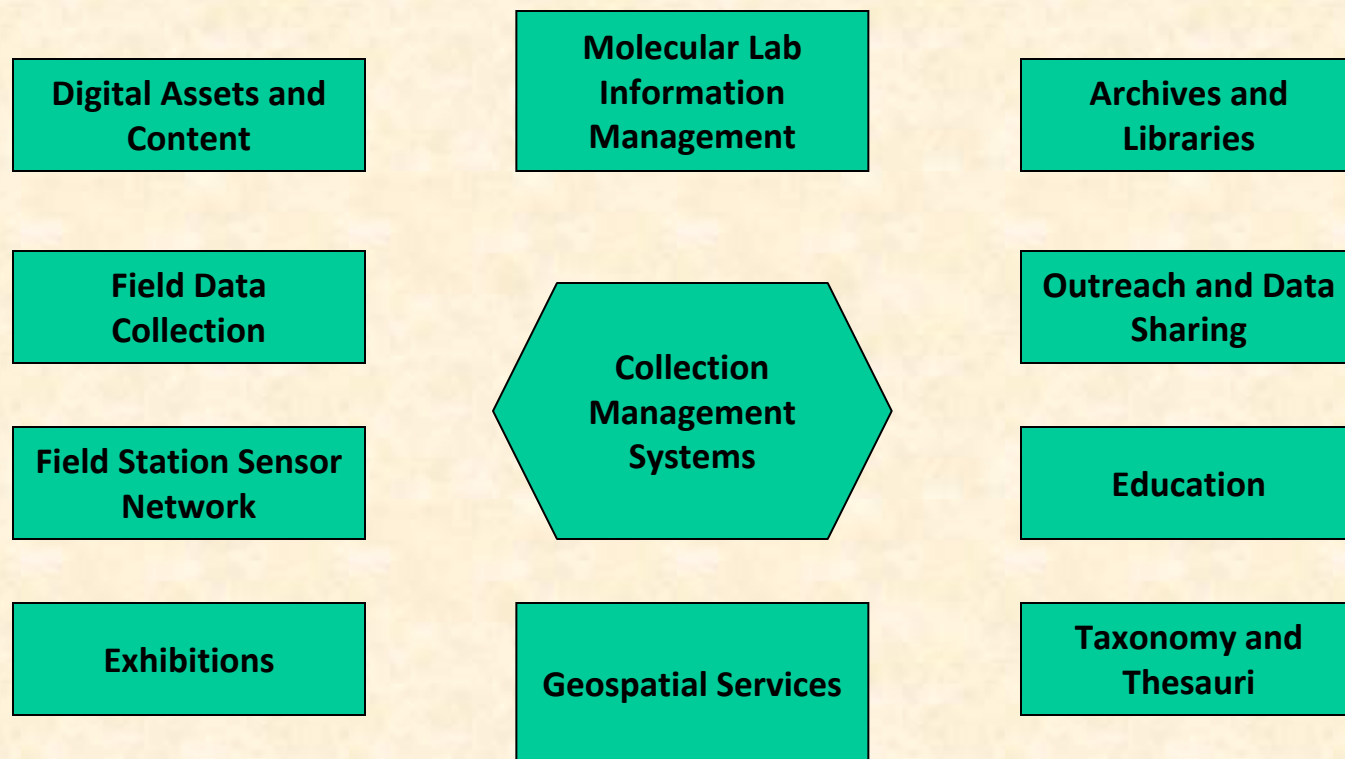


# Lecture 4 – Museums intro

i290-rmm

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# Collection Management Systems – the center of scholarly ecosystem





# What is a collections management system?

- Core resource/Repository of collections information
- Not a digital asset management system, but must support collections with digital objects/work, etc.
- Supports the business of managing objects in a collection; akin to a finance system used to manage an museum's finances
- Information captured supports what museums do day-to-day
- A means to mitigate uncertainty (about what is known about museums' collections)



# What is a collections management system?

Tool to enable convergence among museums, archives, libraries

- Helps define uniqueness
- Helps define where value lies
- Tool to help delineate what the museum knows/doesn't yet know
- Mechanism for establishing/maintaining trust: curatorial, educational, public, administrative
- Means to help enforce policy
- Place to author/maintain legal documents



# What is a collections management system?

- Traditional approach is inward looking business model. CollectionSpace trying to change this to a collaborative model.
- Tension: Admin functions vs. Publication functions
  - Collection cataloguing and access
  - Need to share: i.e., the means to contribute to something outside the institution coupled with the means to manage internal needs such as collections care
- Sharing => Interoperability, which means two things:
  1. Machines needs to speak the same language
  2. Humans need to assign agreed labels

# What is a CollectionObject?



Objects in a collection have a plethora of data associated with them. *CollectionObjects* help manage an object's information and associations.

# CollectionObject Is the Hub



*CollectionObject* is the hub around which an object's information is associated and linked.

# Stuff vs. Activity

- All collections have *stuff*.
- Stuff must be documented for:
  - Discovery
  - Access
  - Legal requirements, auditing, etc.
- *Aboutness* describes intrinsics of stuff
- *Activity* is often more important





# Common themes

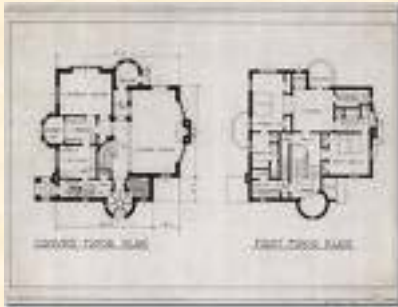
- Spectrum defines baseline for management
- Most collections do cataloging, accession, etc. (must, to *be* a museum).
- All need controlled vocabularies, but vary in which they use.
  - AAT, TGN, ULAN, Nomenclature (more later)
  - Local term lists, domain-specific vocabularies
  - Most life-science collections require taxonomy, taxonomic identification



# Activities

- Museum internal activities
  - Object Entry (Intake), Accession, Object Exit
  - Loans (In and Out)
  - Exhibits
- Research activities
  - Research queries and visits
  - Citations of objects, publication references
  - Expeditions, collecting events
- Outreach, education, and other uses
  - Dissemination
  - Class visits and curriculum support
  - Cultural preservation programs
- Relationships
  - between objects, places, events, entities, etc.

# UC Berkeley Collection Management Systems



- Berkeley Language Center's Archival Catalog & Circulation System (Berkeley Language Center)
- CineFiles (Pacific Film Archives)
- **SAGE (UC Botanical Garden)**
- History of Art Visual Resource Collection (HAVRC) (Department of History of Art)
- Specimen Management System for California Herbaria (SMASCH) (University & Jepson Herbaria)
- Slide & Photograph Image Retrieval Online (SPIRO) (Architecture Visual Resources Library)
- PAHMA Collections (BNHM Consortium, Phoebe A. Hearst Museum of Anthropology)
- Biocode Specimen Database (BNHM Consortium)
- Essig Specimen Database (BNHM Consortium, Essig)
- HERC Specimen Database (BNHM Consortium, HERC)
- UCMP Specimen Database (BNHM Consortium, UC Museum of Paleontology)
- MVZ/Arctos Specimen Database (BNHM Consortium, MVZ)
- Plus ... Bancroft Special Collections and many others





# Intake/Object Entry

- Pre-acquisition
- Initial description
- Tombstone data
- Donor record
- Decision to acquire: yes/no
- Record is dynamically built using pre-entry record as basis
- Additional information added as a result of:
  - research
  - exhibition
  - publication



# Accession/Deaccession

- Legal research (conflicts, rights, regulations)
- Scholarly research (verify artist, history, etc.)
- Budgetary research (cost to acquire)
- Strategic research (relation to collection needs)
- All lead to a recommendation, decision
- Want to capture motivations for pursuit of item, knowledge gained through research, document recommendation and decision



# Cataloguing

- Life of the object
- Legacy descriptions
- Often about the process more than result
- Object metadata
  - Attributes
  - Documentation of historical significance, etc.
  - Spiritual or cultural significance
  - Dollar value
  - Security
  - Access



# Conservation activities

- Motivators: pre-/post-travel (loans), insurance.
  - Need to know condition, history of condition
  - Determination: needs conservation or not?
- Preservation and care
  - Direct actions taken to change the condition of an object
  - Planned treatments, care
  - What kind of gloves do I need to wear?, etc.
  - Can be enormous, detailed documents related to treatment

# Loans (in/out)

- Core collections management activity
- May be about exhibition planning
- Rights
- Legal Terms
- “Whose paperwork?”
- Fixes information within a context: duration, name of exhibition, venues, etc.





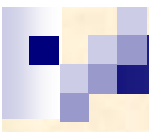
# Loans and Exhibition Planning

- Loans start with curatorial research: what works does museum need to bring in?
  - Contacts at other institution, terms, facility reports
- Loans are usually made for an exhibition
  - Connected to the exhibition planning process
  - Loans occasionally done for storage, not exhibition
- After loan agreement done, additional workflows
  - For rights management (eg. photography, promotional use of images, etc.)
  - Negotiation of legal terms for loans; whose paperwork: theirs or ours?



# More info around loans

- Transportation logistics & care
- Packing/Unpacking
- Insurance
- Condition reporting
- Issue of receipt
- Condition reports
- Return dates, and tracking



# Tracking Loan History

- Need to track this history of loans:
- Have we loaned this object before?
- Are we loaning this out too much?
- Sometimes this is done within the collection management system, other times elsewhere
- Major variation in the amount of loans:  
Met loans thousands, Walker loans fewer
- Balance of trade issues



# Special Conditions of a Loan

- Lighting conditions, humidity, etc.
- Special conditions governing the loan get sent off very early in the process
- Verifying that the conditions are being respected
- Where does the history of loan conditions get stored?
- Information that reflects the history of the object
- Most institutions don't record this information

# Location/Movement

- Leverages Location Authority (location names normalized, correspond to real physical locations).
- Process
  1. Request for movement
  2. Search for record
  3. Determine current location
  4. Determine future location
  5. Secure item (Go to Transport)
  6. Condition report
  7. Movement Method



# Audit

- Checking whether an object is there and if not, figuring out why, how big is the problem, etc.
- How big: informal audit, formal audit
  - Location inventory - every 10 years
  - Location audit - every year
  - Entry method: “Found in collections”
- Quality assurance, condition assurance
- Pull all the objects with mediocre condition report (and audit them)
- Who touched an object (and/or its metadata)



# More Spectrum Procedures

- Conservation and collections care
- Object condition checking and technical assessment
- Rights management
- Use of collections
- Valuation control
- Inventory control
- Object Exit, Deaccession and disposal
- Loss and damage
- Insurance and indemnity management
- Risk management