

Are You Ready for Past Perfect?
An Overview of Best Practices for Collections Cataloging Workshop
July 19, 2013

Afternoon Session – Kay Schlueter, Northfield Historical Society Collections Manager

Highlights:

1. Write a Collection Policy to aid you in determining what you will collect/keep.
2. Sort through your collection if you have not already done so; determine what is in-scope and what is out-of-scope, based on your Collection Policy.
3. Sort items into broad categories, when possible and practical:
 - Objects
 - Photographs
 - Archives
 - Library
4. Use an existing inventory and/or catalog; if you have none, create a basic one on paper first.
5. When numbering your items try to follow standard protocol, which is year first. Examples: 1999.3 ; 2005.22 ; 2013.1, etc. (There is a field in Past Perfect to include old numbers from an earlier scheme.)
6. Label your items as they are being numbered; record those numbers on inventory sheets or cards if creating a paper inventory.
7. Determine a realistic schedule for working on the collection, whether you are creating a paper inventory or cataloging in Past Perfect.
8. Volunteers come and go, especially in the winter. Interview volunteers to make sure they understand the time commitment and training required; schedule mandatory training sessions, particularly for Past Perfect data entry.
9. Determine protocols you will follow when entering data and write them up in a Procedure Manual; some protocols might be:
 - how will states be entered, spelled out or postal abbreviations?
 - how will women's names be entered, married and maiden name, separate entry for each name?
 - how will descriptions be written, as narrative sentences, brief sentences (the description field can also be used to create printed labels)?
 - how will you use the People field, for those in photographs, for everyone associated with an item?

Technology Considerations:

1. Assign a computer-savvy person or persons to manage your hardware, giving them administrative privileges to the computer and its operating system – if more than one person, perhaps a maintenance sheet can be used to record what was done and when
2. Make sure the computer you will be using is compatible with the Past Perfect software specs
3. If adding additional hardware, such as a printer, scanner, etc., make sure your computer is compatible with those hardware specs
4. Purchase a virus protection software if you will be connected to the Internet
5. Set up password-protected logins on the computer for added security and to avoid unauthorized use

6. Run weekly updates for the computer's operating system and virus software
7. Occasionally check on Past Perfect's website to see if any new updates to the software are available – these updates fix glitches and/or enhance the performance of the software – follow all instructions when updating to make sure your data remains viable
8. Use an external hard drive to back up your data, including images and other media files – when the backup is complete, remove the hard drive and store it off-site. (Use the hard drive to back up other important documents you may be storing on your organization's computer.)
9. If you want to use more than one computer, you will need to:
 - set up a network between all computers (no server needed)
 - purchase the PP Network Upgrade (cost based on the number of computers you are networking)
 - load the software on each computer
 - understand and follow a different set of software protocols for managing PP in a networked environment

Resources

Past Perfect provides fee-based and *free* information and services on their website:

<http://museumsoftware.com>

- Computer specifications for using Past Perfect
- Support, by subscription or by incident – fees are charged for either
- Training, through webinars, YouTube and self-paced CD's – fees charged for some training
- User Guide (PP manual) – *free* PDF files of each chapter
- Software updates - *free* with accompanying release notes (tells you what has changed, been enhanced, fixed, etc.)
- Free monthly email newsletter that provides training announcements, software upgrades, and other information – anyone can sign up from your organization
- Searchable Knowledge Base which allows you to look for answers to questions without having to contact the PP support desk – often others have the same question – look here first to see if it has been asked and answered
- Information for placing your collection online using the data within the PP software
- EXPLORE the PP website for additional information and services

Nomenclature 3.0 for Museum Cataloging, 3rd edition. Edited by Paul Bourcier, Ruby Rogers, and the Nomenclature Committee. Altamira Press, c2010. (Available through Amazon, around \$95) – This is built in to PP 5.0 and can be searched alphabetically.

Northeast Document Conservation Center (NEDCC): <http://www.nedcc.org> (Provides information and workshops on various paper-based items, such as scrapbooks, photos, etc.)

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