

# Museum documentation

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THE BRITISH MUSEUM INTERNATIONAL TRAINING PROGRAMME



# Documentation in museums – session contents

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- Introduction to museum documentation
- Core ideas
- Challenges and benefits of good documentation
- Documentation tools
- Plans, policies, procedures
- Using standards and principles to improve documentation
- Documentation systems: Collections management software (CMS)
- How to choose a CMS that is appropriate for your institution
- Associated management tools: DAMS, Bibliographic systems

# Documentation in museums – session objectives

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Järnvägmuseet, [PD](#)

Be able to explain the benefits as well as the challenges of effective documentation

Be able to refer to professional standards of documentation

Be familiar with different documentation tools: documentation systems, plans, procedures and policies

# Defining documentation

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“[Museum] Documentation is the process of recording information for the collections for which a museum or institution is responsible”. **UNESCO Cultural Heritage Protection Handbook 3**, 2007, p.2

“Museum documentation is concerned with the *development and use of information* about *the objects* within a museum collection and *the procedures* which support the management of the collection”. 1.1. Preamble, Statement of Principles of Museum Documentation, CIDOC [my emphasis] ([http://cidoc.mini.icom.museum/wp-content/uploads/sites/6/2020/03/principles6\\_2.pdf](http://cidoc.mini.icom.museum/wp-content/uploads/sites/6/2020/03/principles6_2.pdf))

# Core ideas

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RECORDING INFORMATION ABOUT  
OBJECTS AND COLLECTIONS



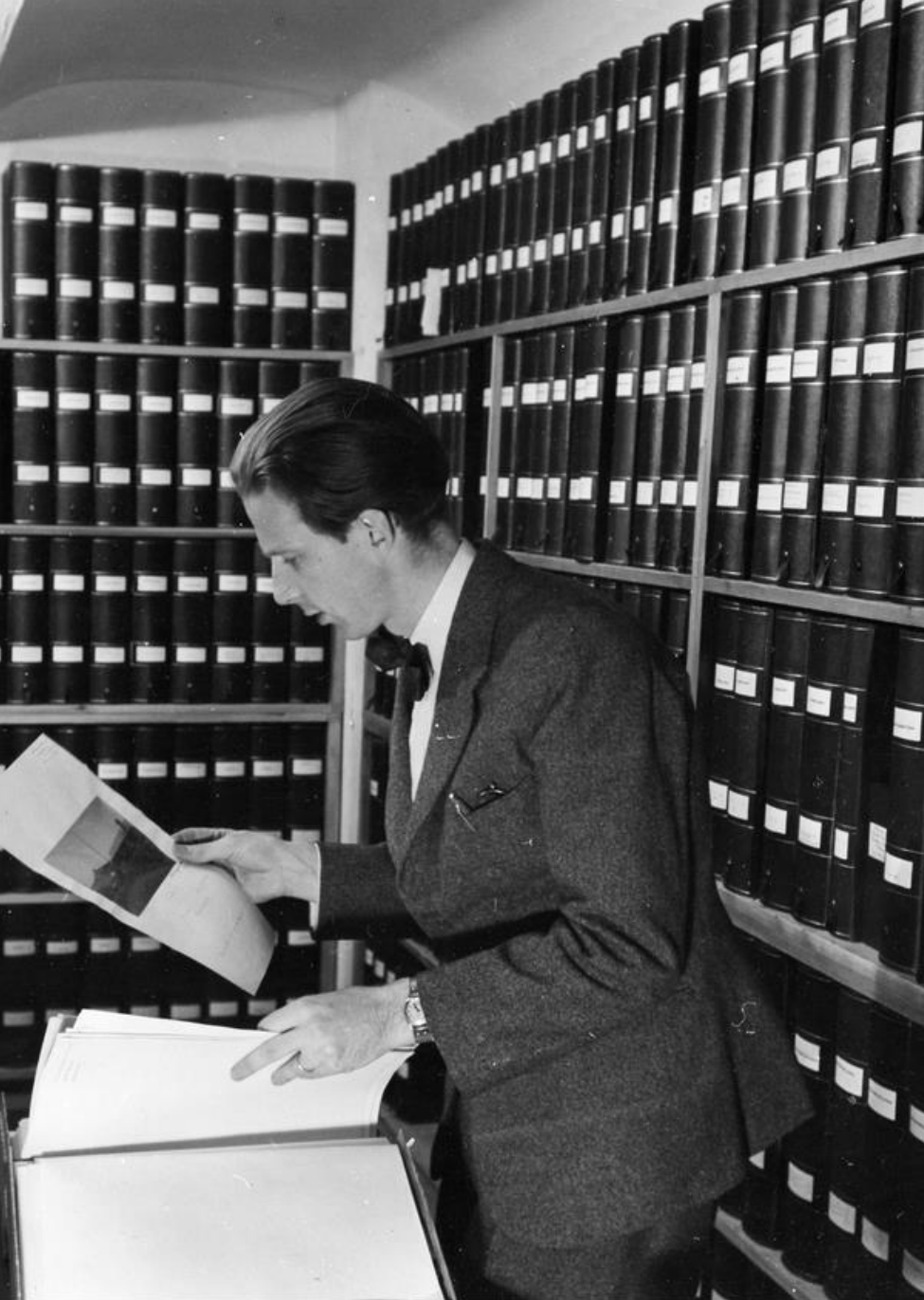
DOCUMENTING PROCESSES, SUCH AS  
OBJECT ENTRY, ACCESSION, LOANS AND  
MOVEMENTS

# Benefits of good documentation

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“With effective documentation, a museum should be able to facilitate:  
collection policies;  
collection care and accountability;  
collection access, interpretation and use;  
collection research. .”

1.1. Preamble, Statement of principles of museum documentation, ICOM



# Safeguarding your collection

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- You know how many and which objects you are responsible for and where they are located (**accountability**)
- Your museum can provide **evidence of ownership**, i.e. that an object belongs to your museum, and a physical description which helps identify it and aids in the **security** of the object
- You can **access** and **interchange** information efficiently
- You can contribute to the **safety** of the objects by keeping condition information up-to-date
- You keep a **historical record**: information about production, collection, ownership and use of objects will be recorded for posterity

# Supporting your work

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Documentation supports you in all important museum activities:

- Collection development
- Research
- Exhibition development
- Conservation
- Risk management
- Publication
- Outreach and engagement

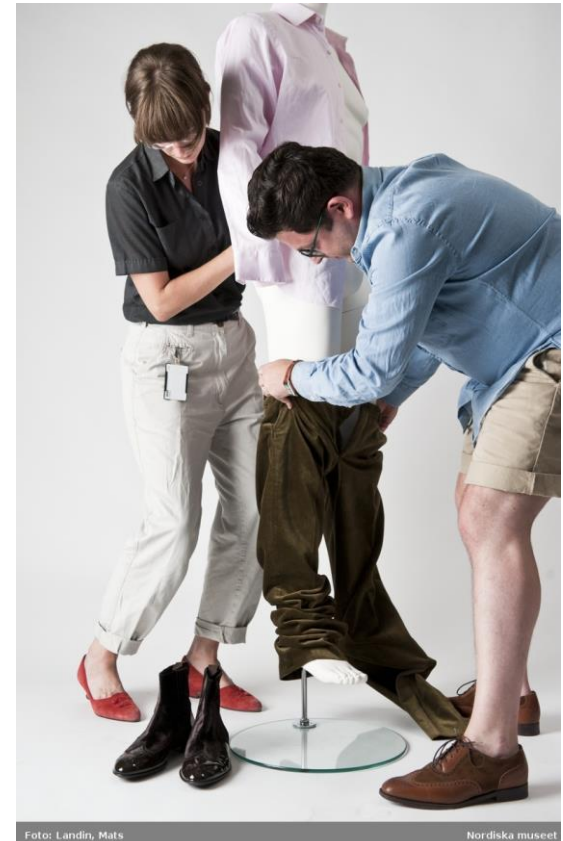


Foto: Landin, Mats

Nordiska museet

Nordiska museet, [CC BY-NC ND 4.0](https://creativecommons.org/licenses/by-nc-nd/4.0/)

# Undesirable results of no or poor documentation

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Objects not  
safeguarded



No legal  
accountability



Reduced in value



Registrar Trek

@RegistrarTrek

 Follow

Found detailed note that back of camera was removed to built in a disco stroboscope but not when, why & by whom. [#MuseumDocumentationFail](#)

20/08/2015 19:52:56

1 RETWEETS 0 FAVORITES

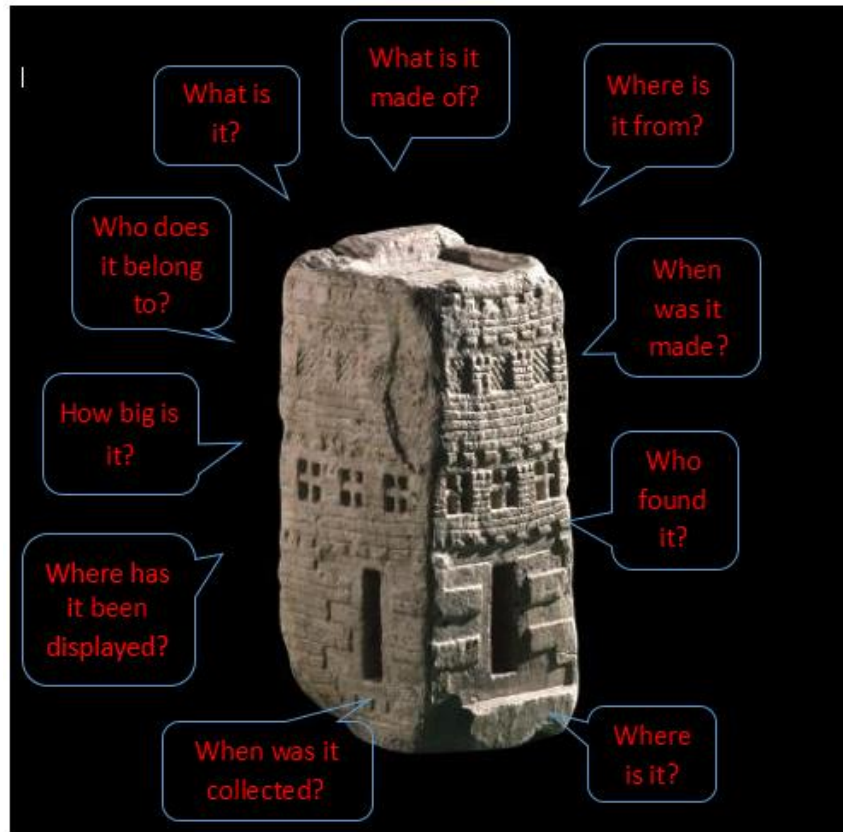


[www.museumsprojekte.de/?p=7500](http://www.museumsprojekte.de/?p=7500)

<https://twitter.com/RegistrarTrek> Captured September 2015

# What information to document

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Also:

Is the environment where it is located appropriate?

What condition is it in?

Does it need to be photographed?

When should it come back from a loan?

# Museum documentation standards

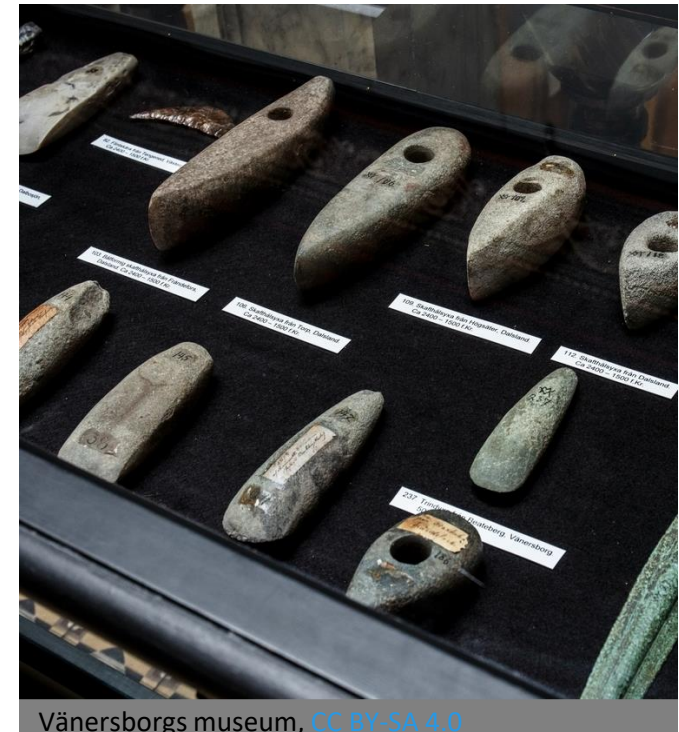
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Reliable: it is consistent and from a trustworthy source

Accessible: makes it easier to find the information you are looking for (improve information retrieval)

Complete: ensure that important information is recorded (so that you have the information you need to account for your objects and keep them safe)

Easy to share: make it easier to exchange information between databases (interoperability)



# International professional standards and guidelines

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Anneli Karlsson, Vasamuseet, [CC BY-SA 4.0](#)

[The SPECTRUM Standard](#)

[ICOM CIDOC](#)

[Object ID](#)

# Planning for documentation

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The ***Policy*** will set out the aims and objectives of documentation in your institution

The ***Plan*** will decide the framework; time, resources, specific goals

The ***Procedures*** describe how the documentation should be carried out



Foto: Segemark, Peter

Nordiska museet

Nordiska museet, [CC BY-NC ND 4.0](https://creativecommons.org/licenses/by-nc-nd/4.0/)

# Documentation systems

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## Purpose

Keep information about the objects (in books, index files, databases),

Support management procedures, such as loans, accessioning and movement and location control, and

Facilitate different levels of access to the information (full access for documentation staff and curators, restricted access to scholars and general public)



Vasamuseet, [CC BY-SA 4.0](#)



# Documentation systems

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Accession registers and entry journals

Loan registers

Movement forms

Location code manuals

Photograph registers

Catalogue cards

Object catalogue

Staff

Equipment

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COLLECTIONS MANAGEMENT SYSTEM

# Challenges

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Requires resources (staff, funds, equipment)

Must be kept up-to-date

Institution-wide (from managers to curators and visitor services)

Quality control (or rubbish in, rubbish out)

# Selecting a Collections Management System

## Finding the right solution for your institution

Develop criteria that the system must meet, including minimal professional standards

Consider your resources: staff, funds, technical skills, equipment, networks

Discuss how you will be using it and establish your priorities: who will be using it? Should everyone have access? Do you need just a catalogue or will you also manage your loans.

The screenshot displays the Primus Collections Management System interface. The main record is for a bust: "Konstverk: NM.0068825: Carl Gustafsson Horn som avliden". The interface is organized into several sections:

- Basinformation:** Registreringsnivå: Enstaka verk; Samling: Demo-samlingen; Tillståndskod: 0 Utställningsklar; Nuvarande placering: RS Russel Square/M1 Magasin Main Building/1 Skulpturhallen.
- Klassifikation:** Klassifikation: 855 Outline- Barmdom; 353 Outline- Hemenredning och möblering; 532 Outline- Bildkonst.
- Benämning:** Ojämning.
- Preciserad benämning:** Bamporträtt.
- Ämnesord:** Livets högtider - Begravning; Minnestavlor; Konst; Tavlor - Ojämningar.
- Titel:** Carl Gustafsson Horn som avliden: annan.
- Soi:** Typ av stil: Klassicism.

On the right side, there is a large image of the bust with a zoom slider and a "Spara ner" button. Below the main image are two smaller thumbnail images. The interface also includes a top navigation bar with options like "REGISTRERA NY", "OM PRIMUS", "ADMIN", and "FAQ", and a user profile section for "KAYSEL SARA".

# Collections management system requirements

- Pricing (licenses)
- Minimum hardware requirements
- Clients
- Operating systems
- Technical support

Must meet minimal professional standards

Must run on Windows OS

Must take authorities and thesauri

Has a search interface

Search results can be sorted

Data can be exported in different formats

Data can be imported

Batches of data can be updated at once

User access can be controlled

Stores .jpg and .tiff images

Records user history (Audits)

# Other support systems

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## **Digital Asset Management System (DAM)**

- Manage digital assets such as images, digital documents, digital sound and video
- Quickly find and share digital files
- Control access to digital files

## **Bibliographical System**

- Organise references

## **Barcode readers**

- Quickly register and scan barcodes for locations

## **Conservation report software**



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# Documentation about documentation

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1. Prepare a documentation policy
2. Make a plan
3. Develop a documentation manual
4. Select a collection management system appropriate for your collection and institution
5. Involve everyone through training and feedback
6. Review

Thank you!

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All images are from <https://digitaltmuseum.org> where you can find information about more than 5 million objects from 300 collections in Sweden and Norway.

# Where to find more information

## Software

CollectiveAccess: <https://collectiveaccess.org/>

CollectionSpace: <https://core.collectionspace.org/cspace/core/login>

Modes: <https://www.modes.org.uk/news/latest-posts/2019/02/28/top-tip-inventory/>

Axiell Emu: <https://www.axiell.com/solutions/product/emu>

MuseumIndex: <https://www.ssl.co.uk/museumindex>

QI: <http://www.qi-cms.com/>

eHive: <https://my.ehive.com/dashboard>

MuseumPlus: [https://www.zetcom.com/en/museumplus\\_en/](https://www.zetcom.com/en/museumplus_en/)

Proficio: <https://rediscoverysoftware.com/resources/interface/>

The Gallery Systems <https://www.gallerysystems.com/>

Primus: <https://kulturit.org/primus>

netX DAMS: <https://www.netx.net/portfolio/museum-digital-asset-management-moma/>

netX on "When do you need a DAM": <https://www.netx.net/what-is-digital-asset-management-dam>

The software criteria checklist från CHIN; Canada: <https://www.canada.ca/en/heritage-information-network/services/collections-management-systems/software-criteria-checklist.html>

# Where to find more information

**CIDOC** – Become a member, attend training and conferences or just use the information on their website. Particularly useful is the section on standards: <http://network.icom.museum/cidoc/standards/cidoc-standards-guidelines/>

**Arts Council England** - Read the guidance on accreditation. Even if your country uses different standards, it may be useful to have some guidelines to follow and refer to when working towards better documentation. Guidelines on Collections management, Public engagement, etc.

<https://www.artscouncil.org.uk/accreditation-scheme/accreditation-how-apply>

Useful questionnaire to see if your museum meets the criteria for accreditation

[https://www.artscouncil.org.uk/sites/default/files/download-file/Accreditation\\_Eligibility\\_Questionnaire\\_Nov2018\\_0.pdf](https://www.artscouncil.org.uk/sites/default/files/download-file/Accreditation_Eligibility_Questionnaire_Nov2018_0.pdf)

**Collections Trust** – This is where you will find information about the Spectrum standard and how to use it. Also useful resources on how to digitise your collections, on terminology control and here you can also find a list of Spectrum compliant software

<https://collectionstrust.org.uk/>

**Object ID:** <http://archives.icom.museum/object-id/>

**AFRICOM:** [http://archives.icom.museum/afridoc/light/html\\_gb/accueil/accueil2.html](http://archives.icom.museum/afridoc/light/html_gb/accueil/accueil2.html)

**Spreading the word: explaining what museum documentation is – and why it's important**

<http://rupertshepherd.info/publications/conferences/spreading-the-word>