



Cleveland Artists Foundation

# PastPerfect Cataloging Manual

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Version 1.0

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# Introduction

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This manual is intended for users cataloging in PastPerfect version 4.0 using the objects facet. This document will describe the people facet as well. In particular, the cataloging process is described for artwork (i.e. the Cleveland Artists Foundation Collection) and for the artists creating these works. Each metadata field in the cataloging process is described and appropriate values are defined. Controlled vocabularies (authority files) are put in place for many fields, as well as instructions for changes and/or additions to these vocabularies. The manual will ensure that objects for the Cleveland Artists Foundation's (CAF) collection are cataloged according to community standards and interoperable with other projects.

This manual was created to fulfill the Master's Practicum Requirements for the Kent State University's School of Library and Information Science. For the complete portfolio of this project, see the following website:  
<http://meltonpracticumportfolio.wikispaces.com/>.

## Acknowledgements

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# Glossary

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**Metadata-** Metadata is described as being data about data which describes a digital object. This data is essential for resource discovery, presentation, administration, and preservation of the digital object.

**Controlled Vocabulary-**a scheme of predefined, authorized terms, determined by the creator of the vocabulary. Such a vocabulary ensures that one term, and one term alone, is used to describe a certain concept, subject, classification, etc. Examples of controlled vocabularies include the Library of Congress Subject Headings and the Getty Research Institute's Art and Architecture Thesaurus.

**Authority File-**Authority files refers to the creation of a single preferred term or name for a person, corporation, etc. An example of an authority file is the Library of Congress Name Authority Files. PastPerfect also uses this term to refer to the files containing the controlled values allowed for specified fields.

**Lexicon-**The lexicon is used in PastPerfect to refer to the controlled vocabulary of object types. The lexicon used by PastPerfect is The Revised Nomenclature for Museum Cataloging.

**Library of Congress Name Authority Files -**Authority file showing preferred names for people and organizations. Used throughout the manual for entering names and organizations. For more information, see <http://authorities.loc.gov/>.

**Library of Congress Subject Headings-**Controlled vocabulary of subject terms used in PastPerfect's subject authority file. Also used to add terms to this list. For more information, see <http://authorities.loc.gov/>.

**Art and Architecture Thesaurus-**Controlled vocabulary created by the Getty Research Institute. Used in PastPerfect's medium, materials, and technique authority files. Also used to add terms to these lists. For more information, see <http://www.getty.edu/research/tools/vocabularies/>.

## Obligation Definitions

**Mandatory-**The field must be filled out for every record.

**Required-**The field must be filled out if the information is known.

**Optional-**The cataloger has the option to fill out the field.

# Tips & Tricks

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- Always right click in a field to view the accompanying authority file. Never type in an entry until checking for an authority file. Authority files are crucial for linking objects and search and retrieval.
- Most fields are “verified,” meaning they require an authority file value. If you attempt to save a record with a value not in the authority file, you will receive an error screen.
- Never type a value into the field if it is not present in the authority file. Follow the protocol for adding/changing the authority file for the specified field in the manual. This will most likely require consulting a controlled vocabulary. Add the preferred term. Finally, select it from the authority file.
- To make additions/changes to authority files, navigate to the authority file editor, located under the setup section from the main screen under authority files.
- “Unknown” and “anonymous” are both terms under contacts, as well as in the people database. Always choose these for unknown or anonymous persons to link these objects.
- A few tips for batch entering: Function keys (located under setup) can be set with useful phrases, such as your name. When entering a batch of accession files with the same donor, select “Fill with Existing Data” to simplify the process. For entering objects, select “use default data.” You can edit the default data screen with fields that will be the same for the entire batch.

# Before You Begin

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1. Check to see if the artist is in the system.
  - a. The artist must be present in both the people's biographies section and the artist/creator authority file.
    - i. For the People's Biographies, check the information with the executive director. Make sure to choose the role "artist."
    - ii. For the authority file:
      1. Consult the Library of Congress Name Authority File: <http://authorities.loc.gov/> and choose the preferred version of the artist's name. Always include the year of birth and death.
      2. If the artist's name is not in Library of Congress, follow the format: Last name, First name, Year of birth-Year of death.
2. Check to see if the donor is in the system.
  - a. The donor must be present in both contacts database and people's biographies.
    - i. For contacts: Add the name and any other information available. For an organization, write the organization's name in the Last Name field.
    - ii. For the people's biographies: Fill in any information that is known and choose the "donor" role.
3. Add yourself to the system.
  - a. You must be added to contacts database and the "Users" authority file.
    - i. For contacts: Add yourself and your information.
    - ii. For the authority file: Choose the setup button and navigate to authority files. Find the "Users" authority file. Click the "Add" button and add you name (Last name, First name). Click the "Link to Contacts" button and find your name. This will link your information to the authority file.
    - iii. This is the same process for adding other CAF employees/volunteers to the system who have had involvement with the objects being cataloged.
4. Check to see if the appraiser is in the system.
  - a. If an appraisal was done the appraiser must be in both contacts database and the "Experts" authority file.
    - i. For contacts: Add their name and information.
    - ii. For the authority file: Choose the setup button and navigate to authority files. Find the "Experts" authority file. Click the "Add" button and add the name (Last name, First name). Click the "Link to Contacts" button and find the name. This will link the information to the authority file.

# The Accession Folder

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Now we move to the cataloging process. The accession folder, located on the main screen, must be created first for each object. It will then be linked to the object through the cataloging process. The accession folder tracks the accession process, donors, and credit lines. Click on the "Accession" icon from the main page and then click the "Add" button. This will display the screen to catalog the accession.

\*Note: We will now begin the "data dictionary" section of the manual. Each table will provide a field, the description, and rules governing the field.

Field	Accession #
<b>Definition</b>	The accession number given to the object.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Free. This number follows the format Year-running number (and occasionally) -copy number
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If the accession number is incomplete or unknown, consult the executive director.

Field	Source
<b>Definition</b>	The person/organization responsible for the object entering the collection.
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Contacts. Choose "Select Donor from Contacts" and select the name. If the source is unknown, choose "Unknown." This will prefill information fields on the source with contact folder information.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If the name is not in the contacts folder, see <a href="#">page 6</a> . If the contact is associated with an organization, but is personally responsible for the gift, change the source to their name (Last name, First name). *Tip: For batches with the same donor choose "fill with current data" to auto fill fields from the previous record.

Click the "Add" button to move to the full screen description.

<b>Field</b>	<b>Website</b>
<b>Definition</b>	The website of the source.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Credit Line</b>
<b>Definition</b>	The credit line for the object, as written in the deed of gift.
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Free. Be sure to copy exactly as written in the deed of gift.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Brief Description of Accession</b>
<b>Definition</b>	A description of the accession process.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Received By</b>
<b>Definition</b>	The person who received the object from the source.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Users Authority File
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If the name is not in the authority file, see <a href="#">pg. 6</a>

<b>Field</b>	<b>Accessioned By</b>
<b>Definition</b>	The person who assigned the accession number.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Users Authority File
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If the name is not in the authority file, see <a href="#">pg. 6</a>



<b>Field</b>	<b>Other #</b>
<b>Definition</b>	Any other number associated with the object
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Numeric
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Price or Value</b>
<b>Definition</b>	The price of purchase or object's value at time of entry into the collection
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Numeric
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Notes</b>
<b>Definition</b>	Notes on the accession.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Accession Activities</b>
<b>Definition</b>	Activities in the accession process.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Date (MM/DD/YYYY)
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	This section consists of numerous activities that may have taken place in the accession process.

You have now completed creating the accession file for the object. Click the "save" button and then click "exit" to move to the next step.

# Cataloging an Object

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You will now catalog the object itself. Click on "Objects" located on the main screen. Click the "Add" button to begin. The first screen, the accession screen, will be displayed.

## The Accession Screen

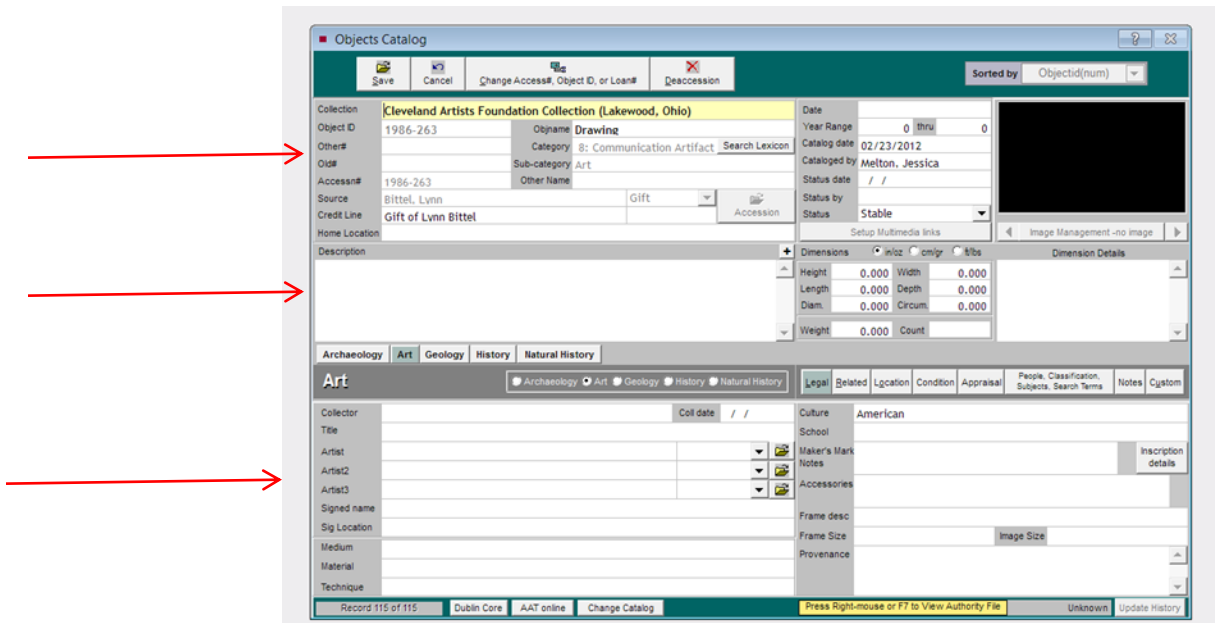
Field	Accession #
<b>Definition</b>	The accession number as entered in the accession file.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Free. Enter the accession number exactly as entered in the accession file or click "search file" and navigate to the accession number. This will prefill the accession information already added.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If the number is not entered in the accession file, see <a href="#">pg. 7-9</a> .

Field	Object ID
<b>Definition</b>	The object identifier, which is unique to each object.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Accession Number. This number will be the same as the accession number.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	*Tip: Check the box "Prefill object ID with accession #"

Field	Obj Name
<b>Definition</b>	This describes the type of object being cataloged.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Lexicon/Authority File. Search the authority file first. If the type is missing, search the lexicon. This will allow the lexicon categories to auto fill.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	The authority file for this field contains commonly used lexicon terms. If you were required to search the lexicon for a term, add it to the authority file (exactly as entered in the lexicon) to simplify the process in the future.

Then click the "Add" button to be moved to the next screen.

You will now be presented with the final screen to catalog an object. To make the manual easier to use, the screen will be divided into three sections, moving left to right in each section.



## Basic Information

The first section will cover basic information about the object, beginning with the field "Collection."

Field	Collection
<b>Definition</b>	The collection the object belongs to.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Collection Authority File. For objects belonging to the CAF collection, choose "Cleveland Artists Foundation Collection (Lakewood, Ohio)."
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	To make additions/changes to the collections authority file, consult the executive director.

<b>Field</b>	<b>Home Location</b>
<b>Definition</b>	The location of the object in CAF's storage structure.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Home/Temporary Location Authority File. Choose the appropriate entry from the authority file.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	To make additions/changes to the location authority file, consult the executive director.

<b>Field</b>	<b>Date</b>
<b>Definition</b>	The date the object was created.
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Date-YYYY. May include c. for circa.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Date Range</b>
<b>Definition</b>	A range of dates in which the object may have been created.
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Date-YYYY-YYYY
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Catalog Date</b>
<b>Definition</b>	The date the object was cataloged.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Date-MM/DD/YYYY
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	*Tip: The current date is programmed as function key F8.

<b>Field</b>	<b>Cataloged By</b>
<b>Definition</b>	The person cataloging the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Users Authority File. Choose your name.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If your name is not in the users authority file, see <a href="#">pg. 6</a>

<b>Field</b>	<b>Status Date</b>
<b>Definition</b>	The date the object's status was determined.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Date-MM/DD/YYYY.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	Today's date is programmed as function key F8.

<b>Field</b>	<b>Status By</b>
<b>Definition</b>	The person determining the object's status
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Users Authority File. Choose the appropriate name.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If your name is not in the users authority file, see <a href="#">pg. 6</a>

<b>Field</b>	<b>Status</b>
<b>Definition</b>	The status of the object
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Status pick list. Choose the appropriate value.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	To make additions/changes to the status pick list, navigate to the authority file editor.

## Description/Dimensions

The next section deals with the description and dimensions of the object.

<b>Field</b>	<b>Description</b>
<b>Definition</b>	A description of the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Free.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	Best Practice: To describe the object as if you could not view it.

Field	Dimensions
<b>Definition</b>	The dimensions of the object.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Numeric, in inches, measured to at least two decimal places.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

Field	Dimensions Details
<b>Definition</b>	Details on the dimensions of the objects
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

## The Art Screen

The final section on the display screen can actually be one of five screens: Archaeology, art, geology, history, and natural history. The cataloger has the option to fill in all of the screens. The art screen, however, is the only screen necessary for cataloging CAF collection objects.

Field	Collector
<b>Definition</b>	The person responsible for collecting the object
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Experts Authority File.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If the name is not entered in the experts authority file, see <a href="#">pg. 6</a>

Field	Coll Date
<b>Definition</b>	The date the object was collected
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Date-MM/DD/YYYY
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Title</b>
<b>Definition</b>	The title given to the object
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Free. Enter artist given titles. If the artist did not give a title enter "Untitled." If there is an alternative title, enter it in parentheses.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	
<b>Field</b>	<b>Artist</b>
<b>Definition</b>	The artist/creator of the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Artist/Creator Authority File.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If the artist is not in the authority file, see <a href="#">pg. 6</a> . If there is only one artist, leave the other artist fields blank.

<b>Field</b>	<b>Artist Role</b>
<b>Definition</b>	The role the artist played in creating the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Artist Role Pick List. Choose "Artist" if only one artist. If there are more than one artist, choose "Artist" for the one chiefly responsible for the object.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	To make additions/changes to the pick list, navigate to the authority file editor.

<b>Field</b>	<b>Signed Name</b>
<b>Definition</b>	The name signed on the object
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Free. Enter exactly as signed on the object. If there is not signature, enter "None."
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Sig Location</b>
<b>Definition</b>	The location of the signature on the object.
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Free.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Medium</b>
<b>Definition</b>	The substance the artist used to create the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Medium Authority File.
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	To make additions/changes to the authority file, first consult the Art and Architecture Thesaurus: <a href="http://www.getty.edu/research/tools/vocabularies/">http://www.getty.edu/research/tools/vocabularies/</a> . Choose only the preferred term and enter it exactly into the authority file. Then select it for the object.

<b>Field</b>	<b>Material</b>
<b>Definition</b>	The materials the artist used to create the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Material Authority File
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	To make additions/changes to the authority file, first consult the Art and Architecture Thesaurus: <a href="http://www.getty.edu/research/tools/vocabularies/">http://www.getty.edu/research/tools/vocabularies/</a> . Choose only the preferred term and enter it exactly into the authority file. Then select it for the object.

<b>Field</b>	<b>Technique</b>
<b>Definition</b>	The method the artist used to create the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Technique Authority File
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	To make additions/changes to the authority file, first consult the Art and Architecture Thesaurus: <a href="http://www.getty.edu/research/tools/vocabularies/">http://www.getty.edu/research/tools/vocabularies/</a> . Choose only the preferred term and enter it exactly into the authority file. Then select it for the object.



<b>Field</b>	<b>Culture</b>
<b>Definition</b>	The culture of the artist.
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Culture Authority File.
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	To make additions/changes to the authority file, first consult the Art and Architecture Thesaurus: <a href="http://www.getty.edu/research/tools/vocabularies/">http://www.getty.edu/research/tools/vocabularies/</a> . Choose only the preferred term and enter it exactly into the authority file. Then select it for the object.

<b>Field</b>	<b>School</b>
<b>Definition</b>	The school the artist belonged to.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	School Authority File
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	To make additions/changes to the authority file, first consult the Art and Architecture Thesaurus: <a href="http://www.getty.edu/research/tools/vocabularies/">http://www.getty.edu/research/tools/vocabularies/</a> . Choose only the preferred term and enter it exactly into the authority file. Then select it for the object.

<b>Field</b>	<b>Maker's Mark</b>
<b>Definition</b>	The maker's mark as inscribed on the object.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free. Enter exactly as it appears on the object
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Inscription Details</b>
<b>Definition</b>	Details of the inscription on the object.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Accessories</b>
<b>Definition</b>	Any accessories accompanying an object
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Accessories Authority File. Choose the appropriate term (i.e. "Frame.") If the object is a loose paper, choose "loose." If the object is an unframed work of canvas, board, or other material, choose "unframed."
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	To make additions/changes to the authority file, use best judgment.

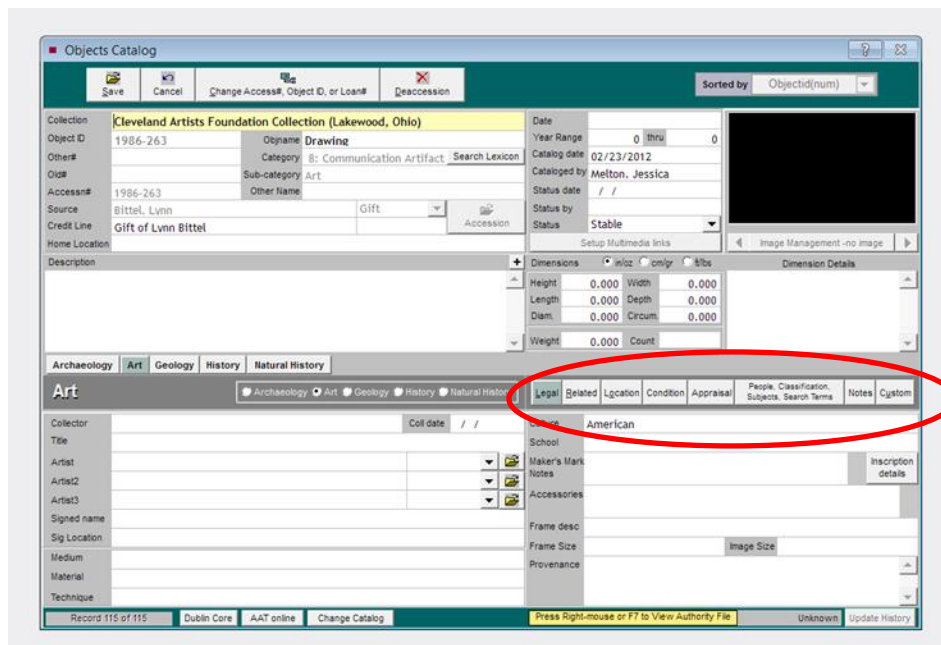
<b>Field</b>	<b>Frame desc</b>
<b>Definition</b>	Description of the frame accompanying the object.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Frame Size</b>
<b>Definition</b>	The dimensions of the frame accompanying the object
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Numeric, in inches, measured to at least two decimal points.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Image Size</b>
<b>Definition</b>	The size of the image
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Numeric, H"xW", in inches, measured to at least two decimal points.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	Most often will be the same value as the dimensions field.

<b>Field</b>	<b>Provenance</b>
<b>Definition</b>	The provenance of the object
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Free. List from earliest to latest in the following format: Date range (write "Unknown" if not known), Last name, First name (Location only if known). Use periods to separate owners.
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	This list should include the source.

The main screen is now complete. Next we will move to the numerous screens located above the art screen on the right side. These screens will be highlighted if they contain information in completed records.



## The Legal Screen

<b>Field</b>	<b>Legal</b>
<b>Definition</b>	The rights statement for the object.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Free. The rights statement can be found in the collections management folder.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	*Tip: Programmed as function keys F4, F5, and F6. Enter them successively to enter the rights statement.

## The Related Screen

This is an optional screen to relate objects and record related publications. This screen can be used to link objects that are mounted together or objects belonging to a series. Click the "Add relation" button to link an object. Then click "Edit" to create a note detailing the relation.

## The Location Screen

This is an optional screen to give further details on the objects location within storage, such as a room, shelf, box, or container number. There is also a field to record a temporary location if the need should arise.

## The Condition Screen

This screen describes the condition of the object and allows the user to attach detailed condition reports. There is also an optional maintenance scheduling section if action is needed.

<b>Field</b>	<b>Condition</b>
<b>Definition</b>	Condition of the object
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Condition Pick List.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Date</b>
<b>Definition</b>	Date the condition was determined
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Date-MM/DD/YYYY
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

Field	Condition By
Definition	The person who assigned the condition.
Obligation	Required
Value	Users Authority File
Single vs. Multiple Values	Single
Notes	If the name is not in the authority file, see <a href="#">pg. 6</a>

Field	General Condition Notes
Definition	Notes on the condition of the object.
Obligation	Optional
Value	Free.
Single vs. Multiple Values	Single
Notes	

## The Appraisal Screen

This screen is used to record current and past appraisals.

Field	Date
Definition	Date of the appraisal
Obligation	Required
Value	Date-MM/DD/YYYY
Single vs. Multiple Values	Single
Notes	Use 01/01/YYYY if exact date is unknown.

Field	Appraiser
Definition	The person responsible for the appraisal
Obligation	Required
Value	Experts Authority File.
Single vs. Multiple Values	Single
Notes	If the name is not entered in the experts authority file, see <a href="#">pg. 6</a>

<b>Field</b>	<b>Acquisition Value</b>
<b>Definition</b>	The value of the object
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Numeric
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Minimum and Maximum Value</b>
<b>Definition</b>	The minimum and maximum value of the object
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Numeric
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>General Appraisal Notes</b>
<b>Definition</b>	Notes on the appraisal
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Insurance Information</b>
<b>Definition</b>	Any information available on insurance for the object
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

## People, Classification, Subjects, and Search Terms

This screen is used to record keywords that will be used to search and retrieve objects. It will also allow for similar objects to be linked together, such as objects donated by a single individual.

<b>Field</b>	<b>People</b>
<b>Definition</b>	Any people associated with the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	People's Biographies. At a minimum, select the artist and any donors associated with the object. If either of these is unknown, select "Unknown."
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	If a person is missing from the people's biographies, see <a href="#">pg. 6.</a>

<b>Field</b>	<b>Classification</b>
<b>Definition</b>	This field records what the object is about.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Classification Authority File.
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	To make additions/changes to classification, consult the Library of Congress Subject Headings: <a href="http://authorities.loc.gov/">http://authorities.loc.gov/</a> . Choose only the preferred term and enter it exactly into the authority file. Then select it for the object. This authority file, however, should almost never be altered. Simply choose those that best apply. Best Practice: To list from general to specific.

<b>Field</b>	<b>Subjects</b>
<b>Definition</b>	This field records what is pictured in the object.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Subjects Authority File
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	To make additions/changes to classification, consult the Library of Congress Subject Headings: <a href="http://authorities.loc.gov/">http://authorities.loc.gov/</a> . Choose only the preferred term and enter it exactly into the authority file. Then select it for the object. This authority file, however, should almost never be altered. Simply choose those that best apply. Best Practice: To list from general to specific. *Tip: Values in the authority file are in the plural.

<b>Field</b>	<b>Search Terms</b>
<b>Definition</b>	This field records those keywords specific to CAF and its collections, such as The Cleveland School.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Search Terms Authority File
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	To make additions/changes to the authority file, consult the executive director.

## Notes

This is an optional screen to record any notes on the object.

## The Custom Screen (Exhibition History)

Exhibition history is a custom field created to record the exhibits an object has been a part of.

<b>Field</b>	<b>Exhibition History</b>
<b>Definition</b>	The exhibits an object has been a part of.
<b>Obligation</b>	<b>Required</b>
<b>Value</b>	Exhibition History Authority File
<b>Single vs. Multiple Values</b>	Multiple
<b>Notes</b>	To make additions/changes to the authority file, navigate to custom fields from the set up menu. Find memo field 21 and click "Set up authority file." Add the exhibition in the following format: Title, Date (Organization). If the term is too long or there is more information, add to "more information" from the entry.

You have now completed the cataloging for the object. Click the "Save" button. The next section will discuss adding an image of the object.



# Image Management

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This screen is where the images for the object are added and described. First, click the "image management" button from the main object screen. Next, click the "Acquire new image" button. Navigate to the image file and select the image. You will then be presented with the image metadata screen.

## Image Metadata

Field	Caption
Definition	A caption for the image
Obligation	Optional
Value	Free. Typically the accession number
Single vs. Multiple Values	Single
Notes	

Field	Original Object Size
Definition	The size of the original object
Obligation	Mandatory
Value	Numeric, H"xW", in inches, measure to at least two decimal points.
Single vs. Multiple Values	Single
Notes	

Field	Original Object Format
Definition	The format of the original object
Obligation	Mandatory
Value	Original Object Format Pick List
Single vs. Multiple Values	Single
Notes	To make additions/changes to the authority file, navigate to authority files editor and edit the pick list.

<b>Field</b>	<b>Negative Number</b>
<b>Definition</b>	Number of the negative
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Numeric
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Equipment used to Acquire</b>
<b>Definition</b>	The equipment used to digitize the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Equipment used to acquire pick list
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	To make additions/changes to the authority file, navigate to authority files editor and edit the pick list.

<b>Field</b>	<b>Software used to Acquire</b>
<b>Definition</b>	The software used to digitize the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Software used to acquire pick list
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	To make additions/changes to the authority file, navigate to authority files editor and edit the pick list.

<b>Field</b>	<b>Settings &amp; Resolution</b>
<b>Definition</b>	The resolution used to digitize the object
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Free
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	Typically 300dpi, which is programmed as function key F11.

<b>Field</b>	<b>Grayscale of RGB (Color)</b>
<b>Definition</b>	The type of digital image.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Grayscale of RGB (Color) pick list.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	To make additions/changes to the authority file, navigate to authority files editor and edit the pick list.

<b>Field</b>	<b>Created By</b>
<b>Definition</b>	The person who created the digital image.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Users Authority File
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	If the name is not in the authority file, see <a href="#">pg. 6</a>

<b>Field</b>	<b>Date Created</b>
<b>Definition</b>	The date the digital image was created.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Date-MM/DD/YYYY
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	Can be found in the properties of the image, under details.

<b>Field</b>	<b>Location of High-Resolution Archival Image</b>
<b>Definition</b>	The location of the high-res image file
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Free. Description of where these files are located
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	This statement is programmed as function key F10.

<b>Field</b>	<b>High-Resolution Image File Name (Including Path)</b>
<b>Definition</b>	The location of the image file.
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Free. Navigate to the image file and select the image.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

<b>Field</b>	<b>Copyrights</b>
<b>Definition</b>	The rights statement for the image
<b>Obligation</b>	<b>Mandatory</b>
<b>Value</b>	Free.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	The copyright statement is located in the collection management folder. This statement is programmed as function key F3.

<b>Field</b>	<b>Detail Notes</b>
<b>Definition</b>	Notes about the digital image.
<b>Obligation</b>	<b>Optional</b>
<b>Value</b>	Free.
<b>Single vs. Multiple Values</b>	Single
<b>Notes</b>	

The remaining fields for the image metadata are auto filled.

You have now completed the cataloging process for the object. Click the "exit" button from the image management screen to return you to the object. Click "exit" to return to the main screen.

# Resources

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**Chagrin Falls Historical Society:** An organization using PastPerfect which acted as a resource for this manual. <http://www.chagrinfallshistoricalsociety.org/>

**City of Cleveland Heights Historic Preservation Planning:** An organization using PastPerfect which acted as a resource for this manual. [http://www.clevelandheights.com/citydept\\_dev\\_preservation.asp](http://www.clevelandheights.com/citydept_dev_preservation.asp)

**Cleveland Artists Foundation Website:** The organization this manual was created for. Provides information on the organization, collection, and artists. <http://www.clevelandartists.org/>

**Cleveland Memory Project's Best Practices Guide:** This site acted as a model for this manual, specifically the metadata section. <http://cmpguide.pbworks.com/w/page/7583940/FrontPage>

**Getty Research Institute Vocabularies:** Contains the Art and Architecture Thesaurus, other vocabularies, and well as information on the vocabularies and the institute. <http://www.getty.edu/research/tools/vocabularies/>

**Library of Congress Authorities:** Includes the authorities, information, and tips for searching. <http://authorities.loc.gov/>

**PastPerfect Software Website:** Information and resources on the software. <http://www.museumsoftware.com/index.shtml>

**Stan Hywet Hall and Gardens:** An organization using PastPerfect which acted as a resource for this manual. <http://www.stanhywet.org>

