

"PastPerfect-ion" : Optimizing PastPerfect Software for Archival Description

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Among the most significant differences between archival work and museum or library work is archivists' focus on *collections* versus individual *items*. Where a museum professional catalogs objects and a librarian catalogs each copy of a book, an archivist catalogs a body of papers.

KEY CONCEPTS FOR ARCHIVAL DESCRIPTION

1. **Provenance and Original Order** – The rule of *provenance* dictates that materials from one source or creator be kept together as one collection. The rule of *original order* dictates that the organizational scheme established by the creator should be preserved. (This rule does not extend to original DISorder.)
2. **Hierarchical Arrangement and Description** – If a collection is complex, archivists identify logical groupings of materials within the whole: series, subseries, and files into which individual items are organized. There should always be an overarching collection-level description for each body of materials; description may also (but need not) exist at lower levels in the organizational hierarchy.
3. **Metadata Standards** – Archivists have agreed there are certain categories of information ("metadata") that should be included in every collection description.

<u>Important metadata categories</u>	<u>Recommended additional metadata</u>
1. Collection number/ID	10. Source of acquisition
2. Name of repository	11. Biographical/historical note
3. Title of collection	12. Subjects ("access points" or keywords and names)
4. Dates of collection (date documents created, not the date of the subjects)	13. Shelf location
5. Extent (size) of collection (linear feet)	14. Related archival materials
6. Name of creator	15. Other finding aids
7. Scope and contents note (narrative description about the collection)	16. Cataloger
8. Conditions governing access	17. Condition of materials (keep private)
9. Language of materials	

The above guidelines will be useful regardless of what program you use to write your archival collections descriptions. On the low-tech end of the spectrum, you can use a simple word processor such as Microsoft Word—open formatting, unlimited hierarchy and metadata possible, and easy to post online as PDFS (although cannot be included on the PACSCL website). On the high-tech end of the spectrum, you may choose to install Archivists' Toolkit (<http://www.archiviststoolkit.org/>). It is free, but you may need an IT person to help you set it up. Proper formatting is built-in, unlimited hierarchy and metadata are possible, and the program generates the file type needed for PACSCL website.

PastPerfect Museum Software (<http://www.museumsoftware.com/>) is approved by the American Association for State and Local History (AASLH) and many small historical societies in the Philadelphia area utilize it for cataloging museum objects, books, and archival materials. It costs about \$870, minus a substantial discount for AASLH members. An add-on component, PastPerfect Online, makes it easy to make selections from your catalog accessible online and to create digital exhibitions.

Hierarchical Description in PastPerfect

Option A: Container List

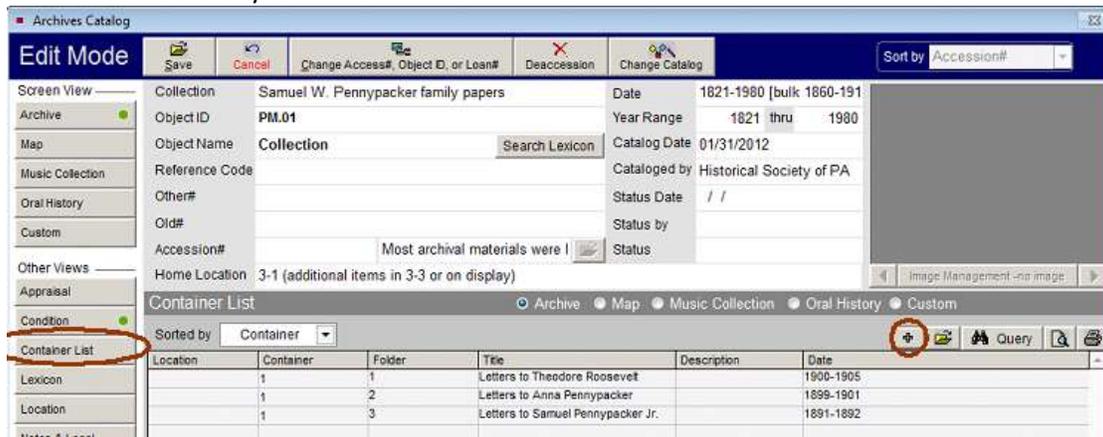
- Simple to use
- Printed report is more straightforward
- Only allows one level of hierarchy
- Limited metadata (description) options

Option B: Linked Records

- More complicated
- Printed report can be confusing
- Unlimited hierarchy levels
- Same metadata options as at collection level

Container List

Create a collection level record and then click on the "Container List" tab to add descriptions for the next level down in the hierarchy.



Linked Records

First create the top, collection-level record. Then create lower-level records and link UP through the hierarchy. The screenshot below shows how to link up from a lower-level record.

