



**ICCROM-UNESCO PARTNERSHIP FOR THE PREVENTIVE  
CONSERVATION OF ENDANGERED MUSEUM COLLECTIONS IN  
DEVELOPING COUNTRIES**

**DOCUMENTATION OF COLLECTIONS**

**Preliminary report**

**Ecole du Patrimoine Africain – EPA  
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## Introduction

In the last 25 years, the number of museums and the size of collections have been growing rapidly while resources are spread more and more thinly. In developing countries, for many museums the situation is overwhelming, with often no access to the network of resources and expertise which exist in other countries. We must stress the fact that these museums have most of the time benefited from the technical assistance of institutions and/or international organisations (UNESCO, ICCROM, ICOM, etc.), as well as from the collaboration that they directly made with some big museums or institutions of the North (GCI, KIT, etc.)

UNESCO and ICCROM have decided to combine their know-how, experience and networks in order to contribute significantly to museum capacity in ensuring the preservation and access to their collections. The actions will focus on fundamental preventive conservation issues, in particular, the need for reliable and dynamic documentation of collections, the need to identify preventive conservation priorities, the need to improve preservation and access of collections in storage, and the need for effective emergency preparation and planning.

In the area of 'Documentation of collections', the objective is:

"To provide smaller museums from developing countries with the necessary skills and tools to analyze their current documentation systems and to guide them through a user-friendly method for computerized documentation systems for their collections. Inexpensive, powerful, easy-to-use and efficient software should be identified and adapted to museum needs."

The first part of the project consisted in carrying out in 2007 a survey of the various initiatives and documentation systems for museum collections which have taken place during the last 20 years in the smaller museums in Africa, in order to better orientate further activities. The survey, carried out in 14 museums, enabled to assess that among other things, 50% of surveyed museums did not have an accession register, and 90% of museums who had attempted computerisation had failed. The various software used, or which had been used, by these museums were OIR (former Object-ID), Museolog and ActiMuséo.

An evaluation meeting took place at EPA, Porto-Novo, Benin, in September 2007, to discuss the results of the survey and to decide on further steps for the ICCROM-UNESCO initiative. The meeting benefited from the participation of some of the surveyed museum staff, EPA, ICCROM and UNESCO representatives.

Three recommendations were drawn up during the evaluation meeting:

1. Ensure that smaller museums can actively engage in facing and solving their documentation backlog and that they reach at least the minimum standards, i.e.: all the museum artefacts are numbered, marked and registered in a hard backed, bound accession register, and that an appropriate location system relates the museum documentation system with the physical location of each museum artefact.
2. Ensure the involvement and support of Heads of museums, because they can give the necessary impulse and ensure that the work is carried out to its completion.
3. Avoid double initiatives by taking into account other initiatives in progress in the institution itself or in the country.

As a result, in 2008, UNESCO and ICCROM proposed to develop and test guidelines and recommendations which would allow the staff of small museums to analyze their documentation system and to define the most appropriate actions to upgrade it to the minimum standards described above (in 1.). In accordance with recommendation 3, these guidelines will take into account existing resources, so as not to redo what has already been done.

The present preliminary report states the results of one of the four actions defined for 2008, which was to explore what information and tools are already widely available (web resources) in the area of museum documentation, in particular regarding the minimum standards. The study of previous initiatives went (1) through the analysis of existing resources, and (2) through contacts with institutions who published these resources or who work in the area of museum documentation.

## 1- Analysis of existing resources

We concentrated here on Internet resources, because of their easy availability, from most areas of the world and also, because one of the main objectives of the project is to provide useful resources on line.

### 1-1 Methodology:

We used a simple method of analysis based on criteria whose finality is to evaluate the accessibility, in the widest sense of the term, to the targeted museums.

For each site we have tried to answer for each site and resource to the following questions: who is the target audience, for what objectives). What is the technical accessibility of the site (slowness and download complexity) for museums which do not often have up to date equipment and software; can the material be easily adapted to these museums since it is important to keep in mind that the resources that we analysed were not developed for our target audience. They were developed either for a specific institution, or for institutions within the same country or network. We have not forgotten to take into account the language in which the resource is provided, which is in itself a drawback for those who do not speak this language! English and French have been the two working languages for the consulted resources presented hereafter.

### 1-2 Collections management:

**1- Collections Link (UK)**, the national advisory service for Collections Management managed by the Collections Trust in partnership with the Institute of Conservation (ICON) and the National Preservation Office (NPO). <http://www.collectionslink.org.uk/>

*Overview:* this material explains every aspect of collections documentation, from the definition of Documentation and its use, to fact sheets and guidelines on various subjects, from Entry records to How to write a documentation plan, going through Labelling and Marking, Accession records, terminology control, retrospective documentation, disposal, etc.

Fact sheets are clear, concise, simple, up to the point, and some of them provide bibliographies, case studies, excerpts of advice from documentation professionals on typical situations (examples: What if my museum's existing numbering system includes numbers that no longer make sense, or there are gaps in my accession register? Or What about old accession registers that do not come up to [SPECTRUM] standards?).

The fact sheets and guidelines on documentation refer to humanities collections, with special inputs on archaeological collections.

*Objectives:*

to "provide a single point of access to best practice in the care and management of collections".

*Target:*

staff working in "museums, libraries and archives and other collections-holding organisations. [...] The defining principle behind Collections Link is that the professional processes involved in managing a collection of physical objects are the same in any context, and any country, irrespective of whether you are a museum, library or an archive.

Although MDA is a museum-sector body, and some of the resources make explicit reference to museums, the service has been designed and developed in conjunction with leading organisations across libraries and archives. Every effort has been made to provide resources that are equally applicable across all 3 domains and, indeed, any other context in which collections management is an issue - as it is for Local History Societies, cathedrals and private collectors. "

*Accessibility:*

Only accessible from Internet. The pages open relatively quickly and the language is simple. It is not possible to download fact sheets in PDF format to save them on a hard drive for consultation off line. However, pages print out well.

The material is available only in English unfortunately.

*Adaptability:*

Most fact sheets refer to the English SPECTRUM standard. However we do not think that this is negative, since many aspects of museum documentation are not linked to any specific system or standard. Users from countries not following the SPECTRUM standards can use the fact sheets with no problem. Simple common sense will tell them when some cases do not apply to them.

A very good, complete and useful resource. The best in the selection.

Fact sheets referring to our objectives are the following:

- [What is Documentation?](http://www.collectionslink.org.uk/manage_information/what_documentation_is)  
([http://www.collectionslink.org.uk/manage\\_information/what\\_documentation\\_is](http://www.collectionslink.org.uk/manage_information/what_documentation_is))
- [Why Documentation Matters](http://www.collectionslink.org.uk/manage_information/why_documentation_matters)  
([http://www.collectionslink.org.uk/manage\\_information/why\\_documentation\\_matters](http://www.collectionslink.org.uk/manage_information/why_documentation_matters))
- [Accession records](http://www.collectionslink.org.uk/manage_information/doc_acquisition/acquisition_factsheet)  
([http://www.collectionslink.org.uk/manage\\_information/doc\\_acquisition/acquisition\\_factsheet](http://www.collectionslink.org.uk/manage_information/doc_acquisition/acquisition_factsheet))
- [Location and movement control](http://www.collectionslink.org.uk/manage_information/doc_loc_move/doc_loc_factsheet)  
([http://www.collectionslink.org.uk/manage\\_information/doc\\_loc\\_move/doc\\_loc\\_factsheet](http://www.collectionslink.org.uk/manage_information/doc_loc_move/doc_loc_factsheet))
- [Cataloguing](http://www.collectionslink.org.uk/manage_information/doc_cataloguing) ([http://www.collectionslink.org.uk/manage\\_information/doc\\_cataloguing](http://www.collectionslink.org.uk/manage_information/doc_cataloguing))
- [Terminology Control](http://www.collectionslink.org.uk/manage_information/about_terminology) ([http://www.collectionslink.org.uk/manage\\_information/about\\_terminology](http://www.collectionslink.org.uk/manage_information/about_terminology))
- [Protecting your Records](http://www.collectionslink.org.uk/manage_information/doc_protect_records)  
([http://www.collectionslink.org.uk/manage\\_information/doc\\_protect\\_records](http://www.collectionslink.org.uk/manage_information/doc_protect_records))
- [Developing a Documentation Procedural Manual](http://www.collectionslink.org.uk/manage_information/procedural_manual)  
([http://www.collectionslink.org.uk/manage\\_information/procedural\\_manual](http://www.collectionslink.org.uk/manage_information/procedural_manual))
- [Documentation Procedural Manual template](http://www.collectionslink.org.uk/manage_information/procedural_manual_template)  
([http://www.collectionslink.org.uk/manage\\_information/procedural\\_manual\\_template](http://www.collectionslink.org.uk/manage_information/procedural_manual_template))
- [Labelling and Marking Objects](http://www.collectionslink.org.uk/manage_information/labelling_marking)  
([http://www.collectionslink.org.uk/manage\\_information/labelling\\_marking](http://www.collectionslink.org.uk/manage_information/labelling_marking))
- [Numbering](http://www.collectionslink.org.uk/manage_information/doc_numbering) ([http://www.collectionslink.org.uk/manage\\_information/doc\\_numbering](http://www.collectionslink.org.uk/manage_information/doc_numbering))
- [Documentation timescales](http://www.collectionslink.org.uk/manage_information/doc_timescales) ([http://www.collectionslink.org.uk/manage\\_information/doc\\_timescales](http://www.collectionslink.org.uk/manage_information/doc_timescales))
- [How to Write a Documentation Plan](http://www.collectionslink.org.uk/manage_information/write_doc_plan)  
([http://www.collectionslink.org.uk/manage\\_information/write\\_doc\\_plan](http://www.collectionslink.org.uk/manage_information/write_doc_plan))
- [MDA Documentation Planning Pack](http://www.collectionslink.org.uk/manage_information/write_doc_plan/docplan1)  
([http://www.collectionslink.org.uk/manage\\_information/write\\_doc\\_plan/docplan1](http://www.collectionslink.org.uk/manage_information/write_doc_plan/docplan1))
- [Retrospective Documentation and Making an Inventory](http://www.collectionslink.org.uk/manage_information/doc_retrospective/retro_doc_factsheet)  
([http://www.collectionslink.org.uk/manage\\_information/doc\\_retrospective/retro\\_doc\\_factsheet](http://www.collectionslink.org.uk/manage_information/doc_retrospective/retro_doc_factsheet))

**2- SPECTRUM: The UK Museum Documentation Standard, MDA, 2007, 393 pages**

The manual is available to download in PDF format (2 Mb) and view, free of charge for non-commercial use from the Collections Link web site in PDF format from <http://www.mda.org.uk/spectrum.htm>.

*Overview:*

SPECTRUM represents a common understanding of good practice for museum documentation, established in partnership with the museum community. It contains procedures for documenting objects and the processes they undergo, as well as identifying and describing the information which needs to be recorded to support the procedures. The material contains Legal procedures, minimum standards, Policies and resources in all the documentation phases of a collection, from pre-entry records to disposal.

*Objectives:* give a guide of good practice for museum documentation

*Target:*

Not specifically stated, but seems to target museums.

*Accessibility:*

It is necessary to register and agree to a standard licence before downloading the material. This process may appear intimidating for people not accustomed to registering on line, going through forms and validation processes.

The resource is a little complicated, very much based on Legal procedures and Policies, which may discourage some readers. Useful in so far as it shows the necessity of having written policies about every areas of museum documentation. Although a good resource for procedures, and containing useful definitions of various documentation procedures, we feel that it is too much in-depth for the purpose of our project and for our target audiences.

### **3- CHIN/RCIP (Canada)**

#### **• DOCUMENTATION GUIDE AND SUGGESTED STANDARDS**

##### *Overview:*

The CHIN "Documentation Guide and Suggested Standards" offers a quick reference to help museums to catalogue humanities collections. It provides advice on data format and vocabulary standards for key data fields that museums need for documentation of their collections and for contribution to Artefacts Canada.

[http://www.chin.gc.ca/English/Collections\\_Management/Documentation\\_Guide/guide.html](http://www.chin.gc.ca/English/Collections_Management/Documentation_Guide/guide.html) (English)

[http://www.rcip.gc.ca/Francais/Gestion\\_Collections/Guide\\_Documentations/guide.html](http://www.rcip.gc.ca/Francais/Gestion_Collections/Guide_Documentations/guide.html) (French)

##### *Objectives:*

- to provide advice on data format and vocabulary standards for key data fields that museums need for documentation of their collections and for contribution to Artefacts Canada.

##### *Target:*

Museums of the ArteFacts Canada network.

##### *Accessibility:*

This resource is too much based on Artefacts Canada to be of use in our project.

### **4- Ministère de la culture, Direction des Musées de France (France)**

#### *Fiches pratiques:*

- *Inventorier des collections de musées* (French only)

<http://www.culture.gouv.fr/culture/infos-pratiques/fiches/fiche3.htm>

##### *Overview:*

The resource explains the procedures for accessioning an artefact, from entry to numbering and inventory control, with explanations on how to number and mark an artefact, and the definition and description of an accession register.

##### *Objectives:*

Give a "how to" guide on how to accession an artefact, as one of the minimum standards of the Direction des Musées de France accreditation scheme.

##### *Target:*

French public museum staff.

##### *Accessibility:*

The document is available only on Internet and cannot be downloaded in PDF or any other format to be consulted off line. The page loads fast and prints out well however.

It refers to the DMF (Direction des Musées de France) standards, particularly concerning the column headings of the Accession register. The DMF standards require the "Registre 14 colonnes" as a standard. However, despite this detail, the resource is good and basic common sense should enable the reader to take a distance vis-à-vis the DMF standard of the 14 column accession book. This resource is rather old however (c. 1995), so anything pointing specifically to French standards may be out of date. But since our target audience does not, to our knowledge, abide to the French standards, this does not matter.

Very good resource. Simple, concise, up to the point.

- *La réserve, mode d'emploi* (French only), 2004  
<http://www.dmf.culture.gouv.fr/documents/museofiches/RESERVEMODEEMPLOI1.pdf>

*Overview:*

Basic resource on collections storage. This could be used as a side resource to documentation, or a reminder, since some documentation activities may need to be preceded by the clearing or equipment of the museum store. The resource however does not talk of location codes, and remains general.

*Objective:*

Help staff to design, build and organise or re-organise their stores

*Target:*

French public museum staff, although this resource can be applied to anybody.

*Accessibility:*

The resource is a PDF document (37 Kb), so it can be downloaded, saved, printed, etc. The text is simple and straightforward. Good resource for our target.

- *Circulaire n°2006/006 du 27 juillet 2006 relative aux opérations de récolement des collections des musées de France* (French only)  
[http://www.culture.gouv.fr/documentation/joconde/fr/partenaires/AIDEMUSEES/circulaire\\_recolement2006-006.pdf](http://www.culture.gouv.fr/documentation/joconde/fr/partenaires/AIDEMUSEES/circulaire_recolement2006-006.pdf)

*Overview:*

This resource explains the proceeding officially adopted by the French government regarding the periodic collections' inventory, from the justification and definition of the inventory to sample inventory cards, through inventory planning and procedures.

*Objective:*

to disseminate, in a simple format, information on aspects of museum documentation Provide information on the procedures linked to the inventory control, with guidelines on the way of doing it and sample inventory cards.

*Target:*

Staff from French public museums

*Accessibility:*

This very good PDF document (416 Kb) can be downloaded, saved and printed. Unfortunately, we were unable to open it with FireFox. It seems to be accessible only with Internet Explorer, and even then, with some difficulty. The proceedings described in this document being standard, i.e. the same followed by those who write about it, this document is useful for our target audience.

## 5- CIDOC <http://cidoc.mediahost.org/>

Fact sheets:

- *Registration:* [http://cidoc.mediahost.org/FactSheet1\(en\)\(E1\).xml](http://cidoc.mediahost.org/FactSheet1(en)(E1).xml)

*Overview:*

An overall good resource which shows, in 8 steps, how an object can be registered after entering the museum.

*Objective:*

To disseminate, in a simple format, information on aspects of museum documentation and to provide guidelines on all the registration procedures of an artefact.

*Target:*

Museum professionals in general.

*Accessibility:*

The resource is available on line only, but can be printed out.

It is generally clear and simple, but not always very clear in some places: uses the term Register both for the loans register and the Accessions register, hence, it is difficult to know in which one should record an artefact, particularly for step C.

The procedure, although up to European standards, is a little complicated (long) for what we know of the targeted museums.

This Fact sheet seems to be in English only (3 July 2008) on the main CIDOC website. However, it is possible to find a French version (with difficulty) in the CDIDOC web site archives only [http://cidoc.mediahost.org/content/archive/cidoc\\_site\\_2006\\_12\\_31/fact1.html#French](http://cidoc.mediahost.org/content/archive/cidoc_site_2006_12_31/fact1.html#French), and on various other web sites such as:

<http://www.cimec.ro/Muzee/Registration.htm#1>

<http://www.willpowerinfo.myby.co.uk/cidoc/fact1.htm#French>

It is a useful resource for our purpose, but the accessibility of the French version needs to be improved.

- *Labelling:* [http://cidoc.mediahost.org/FactSheet2\(en\)\(E1\).xml](http://cidoc.mediahost.org/FactSheet2(en)(E1).xml)

*Overview:*

This resource gives guidelines on how to mark and label artefacts though rules generally accepted in the museum community.

*Objective:*

To disseminate, in a simple format, information on aspects of museum documentation

*Target:*

Museum professionals in general.

*Accessibility:*

A good fact sheet. Clear and complete. Available on line only, but can be printed out,

As the fact sheet on registration however, it seems to be in English only (3 July 2008) on the main CIDOC website, which is a shame. However, there again, it is possible to find a French version (with difficulty) in the CDIDOC web site archives:

[http://cidoc.mediahost.org/content/archive/cidoc\\_site\\_2006\\_12\\_31/fact2.html#French](http://cidoc.mediahost.org/content/archive/cidoc_site_2006_12_31/fact2.html#French), and on various other web sites such as:

[http://www.cimec.ro/Muzee/Etiquetare/markinge\\_etiquetage\\_objets.htm#French](http://www.cimec.ro/Muzee/Etiquetare/markinge_etiquetage_objets.htm#French)

- *International Guidelines for Museum Object Information: The CIDOC Information Categories* (English only): <http://cidoc.mediahost.org/guidelines1995.pdf>, 95 pages, 1995

*Overview:*

"The Guidelines are a description of the Information Categories that can be used when developing records about the objects in museum collections". It is a good resource which details, information group by information group (Description, Condition, Location, etc.), the purpose of the information group, what to record, and how to record it (whether using a manual or computerised system).

*Objectives:*

- Provide a basis for an international museum standard
- Provide guidance in the setting up of a practical documentation system.

*Target:*

"Small museums with no access to existing standards and those in developing countries".

*Accessibility:*

The resource is in PDF format (329 Kb), so can be saved, consulted off line once downloaded and printed out.

In 1995, date at which the guidelines were published, a French version was said to be in preparation. Having failed to find the Guidelines in French or any mention of them on the Internet, we applied to Mr Richard Light, Chair of the Documentation Standards Working Group, for information, and he informed us that the preparation of the French version of the CIDOC Information Categories never happened.

It seems that the CIDOC web site is under construction, and therefore the French version is not available. When on the French version, when one clicks on most links, the visitor is sent to the English version. We do hope that CIDOC will find time and resources to have a completely bilingual web site, since the ease to find resources is a key factor in the dissemination of knowledge. CIDOC resources should be centralised and easily findable for successful dissemination.

## **6- National park service (US)**

- *Managing archaeological collections*

<http://www.nps.gov/history/archeology/collections/index.htm> (English only)

*Overview:*

This online distance learning course covers all aspects of caring for archaeological collections. The resource provides inputs with quizzes for self-evaluation. Section 8 is dedicated to [Collections Management](http://www.nps.gov/history/archeology/collections/mgt_01.htm) ([http://www.nps.gov/history/archeology/collections/mgt\\_01.htm](http://www.nps.gov/history/archeology/collections/mgt_01.htm)).

*Objectives:*

“Assist those who are interested in or need to learn more about preserving and managing archaeological collections over the long term.”

*Target:*

Primarily, but not exclusively, National Parks Service museum staff: archaeologists, curators, cultural resources managers, planners, etc.

*Accessibility:*

Some information is theoretical, with no guidelines on “how to do” (for example the inventory section), and others are more practical (marking). Useful for those who have archaeological collections and who want to have ideas on how to number and mark them, etc.

This resource remains a little bit too general though, although it is a good introduction and can help provide specific information on some subjects.

It is only available on line but pages print out relatively well (last lines do not appear at the bottom of the page). No French version.

- *Museum handbook* (English only)

*Overview:*

Reference guide on how to manage, preserve, document, access and use museum collections. It is also available in printed (published) format.

There are three parts to the NPS Museum Handbook:

Part I, Museum Collections

Part II, Museum Records (<http://www.nps.gov/history/museum/publications/MHII/mushbkII.html>)

Part III, Museum Collections Use

Part II provides guidance on, and outlines procedures for, museum record keeping, including accessioning, cataloguing, loans, inventory, de-accessioning, photography, and reporting annual collection management data. Appendices provide further more specific information (definition, classifications, terminology) on various subject areas: archaeology, ethnology, history, etc. These however are more centred on American archaeology, ethnology, etc., so classification for example will refer to American cultures and history. But it can be used for inspiration. All files are in PDF format.

This good resource takes the form of a series of questions and related answers. The questions are quite straight forward and refer to typical museum situations.

*Objectives:*

To provide guidance on, and outlines procedures for, museum record keeping

*Target:*

Primarily National Parks Service museum staff.

*Accessibility:*

The resource focuses on the Park, so all references and instructions refer to “the Park”. However, there are good “true life” examples, with questions that have obviously been asked by park/museum curators in the past, with advice and guidelines, which can be applied to many museums, since they follow American museum standards. Some fact sheets (Inventory) use the Park’s computerised system as a reference tool. In these cases, the resource is not useful to our target audience. In most cases, if the user can take a step back vis-à-vis “the Park” it is a useful resource.

## **7- Getty Conservation Institute**

- *Collections theft response procedures, 2001* – English only

[http://www.getty.edu/conservation/publications/pdf\\_publications/theftresponse.pdf](http://www.getty.edu/conservation/publications/pdf_publications/theftresponse.pdf)

*Overview:*

Two pages in this resource, which focuses on Theft, can be of interest for documentation: p. 10, Object ID checklist and p. 12, Registrar, where the mission and tasks of a registrar (before and after theft) are listed.

*Objective:*

“Provide guidance to the multiple functions involved in theft response, and suggest actions to take before and after the incident”.

*Target:*

“Cultural property organizations (museums, libraries, archives) of any size”.

*Accessibility:*

The resource is in PDF format, so can be consulted off line once downloaded. It is only available in English. Texts are simple and may be used for our project, although as stated above, very few parts of the document refer to documentation.

## **8- Museums, Libraries and Archive Council, MLA (UK)**

- *Benchmarks in Collection Care for Museums, Archives, and Libraries: A Self-assessment Checklist*

[http://www.mla.gov.uk/resources/assets//B/benchmarks\\_pdf\\_6849.pdf](http://www.mla.gov.uk/resources/assets//B/benchmarks_pdf_6849.pdf) (PDF)

*Overview:*

This handbook was developed by Resource, the council for museums, libraries and archives in the U.K. It is a self-assessment checklist to help libraries, archives, and museums identify best practices in stewardship of their collections, to help them determine where improvements are needed, and to assist them in measuring progress.

*Objectives:*

Help libraries, archives, and museums identify best practices in stewardship of their collections and improve themselves.

*Target:*

Libraries, archives, and museums

*Accessibility:*

This reference is in PDF format, which means it can be downloaded and saved for use off line.

It contains very little on documentation, p. 53: Labelling and Marking (location system) and is in English only. We do not propose to use it in developing our resources.

## 9- Canadian Conservation Institute / Institut Canadien de Conservation

- *CCI Notes: N1/5 Applying Registration Numbers to Paintings and Sculptures (1994) / Pose des numéros d'enregistrement sur les peintures et les sculptures (1994)*

### *Overview:*

This very good resource, offers practical instructions on how to mark or label artefacts. It is intended for a broad audience. For orders outside Canada, individual titles cost from 2,50 USD to 1,50 USD depending on the number of Notes ordered.

### *Objectives:*

To offer practical advice about issues and questions related to the care, handling, and storage of cultural objects.

### *Target:*

Museum professionals in general, broad audience.

### *Accessibility:*

Note N1/15 can be ordered from the CCI web site from the online [Bookstore](#), or by fax, letter, telephone, or e-mail.

Upon receipt of payment, an access key is given to the user so he can download it from the web site. The process is a bit long for someone not accustomed to the Web. One must first create an account, then proceed to the Bookstore, select the desired Note, proceed to checkout, etc. We did not test the whole process, but very probably, a payment card (Visa, American Express, etc.) is required, which is not possible for what we know of our target audience. This resource remains therefore a little out of reach (cost + online payment) for our target, unless some sort of agreement is made with CCI.

## 10- UNESCO

- *Running a museum, A Practical Handbook, 2006, 231 pages*

### *Overview:*

This useful handbook provides basic definitions in the Collections Management chapter (p.17), as well as general information on numbering and marking.

A whole chapter is dedicated to Inventories and Documentation (p. 31), which offers practical advice, albeit rather general, on the documentation process, accessioning, inventory control and cataloguing, syntax and terminology, object numbering, labelling and marking, the use of manual and computer-based systems, etc.

The paragraph on syntax and terminology is clear, with examples for better comprehension. The only thing missing is the justification of the importance of standardisation of terminology.

The appendix which lists the recommended documentary fields is very useful because it synthesises the different information fields which can exist, with their use, and those which are, according to the author, the basic fields.

The main guidelines of the various documentation procedures are described, but often with too little detail to enable it to be a didactic tool for our audience, i.e. untrained or little trained staff. For example, the information contained in the marking section does not enable a person who does not know how to mark an artefact to do so.

### *Objectives:*

- “- To provide an overview of the key aspects of the operation of a museum that is anxious to serve the needs and hopes of its visitors and the wider community in the 21st century”
- provide information and advice on current “best practice”.

*Target:*

A very broad audience, i.e.: Iraqi museum staff, inexperienced and experienced professionals and technicians worldwide, trainers and trainees in courses on museum subjects, non professionals.

*Accessibility:*

As said above, the handbook tends to describe rules and/or guidelines rather than gives indications on "how to". It is however a good resource for people already acquainted with the subject of documentation, which we propose to use.

It is available in French, English and Arabic and can be downloaded from UNESCO's web site. The file is not too big (c. 2 MB) but may take from up to 30 minutes to 1 hour and a half to download depending on bandwidth.

English: <http://unesdoc.unesco.org/images/0014/001410/141067EO.pdf>

French: <http://unesdoc.unesco.org/images/0014/001478/147854f.pdf>

Arabic: <http://unesdoc.unesco.org/images/0014/001410/141067a.pdf>

### **1-3 Thesaurus, standardisation**

#### **1- Willpower Information, Information Management Consultants (UK) (English only)**

- *Thesaurus principles and practice*, 1992, Rev. 1998: <http://www.willpowerinfo.co.uk/thesprin.htm>

*Overview:*

Good resource which explains the use of a thesaurus, problems arising when one is not used, with graphical examples that make comprehension easier.

*Objectives:*

Provide information and guidelines on thesaurus construction and use.

*Target:*

Museum professionals (the paper was originally presented at a workshop "Thesauri for museum documentation" held at the Science Museum, London, on 24th February 1992, by the MDA).

*Accessibility:*

The text is available on line only but prints out well. It is in English only.

It gets a bit "complicated" towards the end, but it is a useful introduction to the problematic of a thesaurus and how to construct one.

#### **2- Ministère de la culture, France (French only)**

- *Thesaurus des objets mobiliers* (2001) <http://www.culture.gouv.fr/culture/inventai/extranet/ttom.html>

*Overview:*

This is a thesaurus of movable artefacts, with definitions for generic terms.

*Objectives:*

Provide a tool for cataloguing.

*Target:*

French museum professionals

*Accessibility:*

Each part of the thesaurus is in PDF format, so can be downloaded and saved to be used off line. The document is in French only.

The thesaurus is difficult to use. It is also very much orientated to French cultural artefacts, so terms included in the thesaurus may not often be of use to the targeted museums.

Not, in our opinion, a very useful resource for our target.

- *Définitions des techniques, médiums, matériaux et supports (décembre 2003)* (base JOCONDE)

<http://www.culture.gouv.fr/documentation/joconde/fr/partenaires/AIDEMUSEES/def-techniques1.htm>  
or  
<http://www.culture.gouv.fr/documentation/joconde/fr/partenaires/AIDEMUSEES/def-tech.rtf> (Word document)

*Overview:*

This resource contains definitions of techniques, mediums, materials and supports. It can be used as a reference for the documentation of a Fine Arts collection.

*Objectives:*

Provide a tool for cataloguing Fine Arts.

*Target:*

French Fine Arts museums.

*Accessibility:*

Can be read on line or downloaded in RTF format for use off line. It is available in French only.

- *Vocabulaires scientifiques*, June 2008

<http://www.culture.gouv.fr/documentation/joconde/fr/partenaires/AIDEMUSEES/telechargement.htm>

*Overview:*

Word lists compiling terminologies for use-destinations, techniques-materials, methods of collecting, juridical status, periods, subjects, iconography, etc. to be used for cataloguing and describing Fine Arts artefacts. These lists are centralised, i.e. their contents are provided by the various museums participating in the Joconde database. They are updated twice a year.

*Objectives:*

Provide a tool for cataloguing Fine Arts and making queries in a standardised way in the Joconde database.

*Target:*

French Fine Arts museums in the Joconde network.

*Accessibility:*

These word lists are available for downloading in RTF format for use off line. They are available in French only. They can be used for the cataloguing of Fine Arts by museums not necessarily belonging to the Joconde network.

### **3- Getty Conservation Institute (English only)**

- *Art & Architecture Thesaurus Online (AAT)*

[http://www.getty.edu/research/conducting\\_research/vocabularies/aat/](http://www.getty.edu/research/conducting_research/vocabularies/aat/)

*Overview:*

The AAT contains generic terms to describe objects, artists, concepts, and places for various disciplines that specialize in art, architecture and material culture. It contains no iconographic subjects and no proper names. That is, each concept is generic, not specific. For example, the generic term *cathedral* is in the AAT, but the specific proper name *Chartres Cathedral* is not.

One can search a specific term using a search box, or go down (or up) the hierarchy to have a global view. Starting at the top of the hierarchy (<http://www.getty.edu/vow/AATHierarchy?find=container&logic=AND&note=&page=1&subjectid=300264092>) may be easier, as one can then access the thesaurus by Hierarchy Name (i.e. broad terms such as Costume, Containers, Measuring Devices, etc.).

- *Getty Thesaurus of Geographic Names Online (TGN)*

[http://www.getty.edu/research/conducting\\_research/vocabularies/tgn/](http://www.getty.edu/research/conducting_research/vocabularies/tgn/)

*Overview:*

The TGN includes names and associated information about places. Places in TGN include administrative political entities (i.e., *cities, nations*) and physical features (i.e., *mountains, rivers*). Current and historical places are included.

*Objectives:*

- "help describe works of art, architecture, material culture, archival materials," etc.
- "provide information for researchers"
- "search assistants to enhance end-user access to online resources".

*Target:*

"Catalogers or indexers"; "researchers"

*Accessibility:*

Both these resources are good, albeit a little long to use, because of the number of clicks one has to go through to browse in the hierarchy and also the connexion to the site is slow from Gabon, where it was tested. One needs a little time and motivation to learn how to use them.

These thesauri could be used as indexing tools for the courageous and those who have free Internet connexion, but most probably will be used as examples to construct thesauri, or as references.

The fact that they seem to exist only online is a drawback. They cannot be saved onto the user's computer for use at any time offline (for museums which do not have Internet for example). They may be too elaborate for the small museums we target.

#### **4- AFRICOM**

- *AFRICOM handbook of Standards* (English and French)

<http://icom.museum/afridoc/>

*Overview:*

A good resource which gives information on what to put in the recommended AFRICOM information fields.

This resource deals with both Humanities and Natural science collections. Unfortunately however, no thesauri/terminology lists are suggested for the Natural Sciences (i.e. for classified name, geological period, etc.).

*Objectives:*

- facilitate collections management
- ensure the security of objects
- facilitate exchange between museums and the development of common projects
- prepare the computerisation of inventories and the documentation of collections by a standardised and rigorous organisation of information.

*Target:*

African museums

*Accessibility:*

The handbook is available on line but also in printed (published) format. The on line version is quick to load, and is available in French and English.

Even for those not using the AFRICOM standards, the resource is useful since it contains information fields that are common to most recommendations. It possesses short and simple thesauri, or rather terminology lists, on different domains: country names, category by function, materials, etc., which are more manageable for our target than the more elaborate Getty or Ministère de la Culture thesauri. It is a good overview on information content. Users who do not adhere to AFRICOM standards can easily use this resource, provided they manage to take a step back and adapt the content to their needs.

#### **5- ICOM International Committee for the Museums and Collections of Costume**

- *Vocabulary of Basic Terms for Cataloguing Costume* (English, French and German)

<http://www.mda.org.uk/costume/vbt00e.htm>

*Vocabulaire de Base pour les Fichiers de Costume*

<http://www.mda.org.uk/costume/vbt00f.htm>

Vokabular grundlegender Begriffe für die Katalogisierung von Kleidung

<http://www.mda.org.uk/costume/vbt00d.htm>

*Overview:*

A good thesaurus, easily « readable », specialising in costume.

*Objectives:*

Provide a guide to recording, setting out what information should be recorded and recommending a vocabulary of basic terms for identifying and recording garments and accessories.

*Target:*

Museums containing collections of European style garments.

*Accessibility:*

The resource is only available on line, but the site is quite fast to load.

Images help to illustrate items of clothing. Despite the fact that it is more centred on European clothing, the resource can give ideas or vocabulary to our target audience and can be used as a canvas to be completed.

## 6- MDA

- *Terminology Bank* <http://www.mda.org.uk/spectrum-terminology/termbank> (English only)

Terminologies published online by MDA:

[MDA Archaeological Objects Thesaurus](http://www.mda.org.uk/archobj/archcon.htm) (<http://www.mda.org.uk/archobj/archcon.htm>)

[MDA Waterways Object Name Thesaurus](http://www.mda.org.uk/waterw/index.htm) (<http://www.mda.org.uk/waterw/index.htm>)

[MDA Railways Object Name Thesaurus](http://www.mda.org.uk/railway/index.htm) (<http://www.mda.org.uk/railway/index.htm>)

[British Museum Object Names Thesaurus](http://www.mda.org.uk/bmobj/Objintro.htm) (<http://www.mda.org.uk/bmobj/Objintro.htm>)

[British Museum Materials Thesaurus](http://www.mda.org.uk/bmmat/matintro.htm) (<http://www.mda.org.uk/bmmat/matintro.htm>)

Pitt Rivers Museum, University of Oxford wordlists:

[Class](http://www.mda.org.uk/spectrum-terminology/pitt-rivers/class) (<http://www.mda.org.uk/spectrum-terminology/pitt-rivers/class>);

[Continent](http://www.mda.org.uk/spectrum-terminology/pitt-rivers/cont) (<http://www.mda.org.uk/spectrum-terminology/pitt-rivers/cont>);

[Country](http://www.mda.org.uk/spectrum-terminology/pitt-rivers/coun) (<http://www.mda.org.uk/spectrum-terminology/pitt-rivers/coun>);

[Group](http://www.mda.org.uk/spectrum-terminology/pitt-rivers/group) (<http://www.mda.org.uk/spectrum-terminology/pitt-rivers/group>);

[Keyword](http://www.mda.org.uk/spectrum-terminology/pitt-rivers/keyword) (<http://www.mda.org.uk/spectrum-terminology/pitt-rivers/keyword>);

[Material](http://www.mda.org.uk/spectrum-terminology/pitt-rivers/mat) (<http://www.mda.org.uk/spectrum-terminology/pitt-rivers/mat>);

[Process](http://www.mda.org.uk/spectrum-terminology/pitt-rivers/proc) (<http://www.mda.org.uk/spectrum-terminology/pitt-rivers/proc>)

*Overview:*

These thesauri have been drawn up by specific museums apart from the MDA archaeological thesaurus.

*Objectives:*

Provide greater availability and co-ordination of standard terminologies.

*Target:*

Primarily UK museum professionals.

*Accessibility:*

According to the MDA website, some of these thesauri are available in printed form. Since these thesauri and word lists have been developed by specific institutions, users who wish to use them must bear in mind that they are adapted to the collection of the museum which uses them, therefore, a step back should be taken when using them. Also, the Internet format is difficult to manage, because of bandwidth issues and also for people not accustomed to browsing. Understanding how to use a thesaurus is complicated and takes time to practice. These remarks concern all ready-made thesauri. For those who are accustomed to thesauri, these resources may be interesting depending on the context. We will probably cite them as references, but not use them as central resources, since the use of thesauruses is difficult for those not accustomed to them. The Pitt Rivers word lists are more accessible.

## 7- Collections Trust

- *Guidelines for Constructing a Museum Object Name Thesaurus* (English only)

<http://www.mda.org.uk/spectrum-terminology/holm2>

### *Overview:*

Developed by Stuart Holm and the MDA Terminology Working Group, these guidelines provide a common set of rules to guide thesaurus developers.

### *Objectives:*

- provide greater availability and co-ordination of standard terminologies;
- guide system developers whether they are undertaking major new developments or minor modifications

### *Target:*

System developers

### *Accessibility:*

Available on line only and only in English.

Some basic familiarity with thesauri is necessary to understand this resource. Anyone who has not yet come across this type of indexing tool may find the guidelines difficult to follow.

We will probably cite them as references, but not use them as a central resource.

## 1-4 Computerisation

### 1- CHIN/RCIP (Canada)

- *Collections Management Software Selection: online tutorial* (English/French)

[http://www.chin.gc.ca/English/Collections\\_Management/Software\\_Selection/index.html](http://www.chin.gc.ca/English/Collections_Management/Software_Selection/index.html)

*Choix de logiciels de gestion des collections :*

[http://www.rcip.gc.ca/Francais/Gestion\\_Collections/Selection\\_Logiciel/index.html](http://www.rcip.gc.ca/Francais/Gestion_Collections/Selection_Logiciel/index.html)

### *Overview:*

This very good on-line training course is a guide through the process of determining software needs, and helps create procedures for evaluating, selecting, implementing and maintaining the new system. The tutorial contains theoretical inputs, advice, references and exercises for each of its nine modules. The exercises can be downloaded. Corrections for the exercises are not provided.

### *Objectives:*

It aims at helping users to develop a plan and manage a project to choose and implement a collections' management software.

### *Target:*

Canadian heritage professionals primarily, but not exclusively, working in a small, medium, or large institution.

### *Accessibility:*

Can be consulted online only but prints out well. Available in English and French. Very good comprehensible resource. It does not apply to any museum in particular, so can be used by all.

- *Criteria check list* (2003), English and French

[http://www.chin.gc.ca/English/Collections\\_Management/Software\\_Selection/English/Pdf/criteria\\_check\\_list.pdf](http://www.chin.gc.ca/English/Collections_Management/Software_Selection/English/Pdf/criteria_check_list.pdf)

*Liste de critères*

[http://www.rcip.gc.ca/Francais/Gestion\\_Collections/Selection\\_Logiciel/Francais/Pdf/liste\\_de\\_criteres.pdf](http://www.rcip.gc.ca/Francais/Gestion_Collections/Selection_Logiciel/Francais/Pdf/liste_de_criteres.pdf)

*Overview:*

A check list to help choose a collections management software by reviewing most aspects of collection management, and ticking what we think is mandatory, nice to have or applicable.

*Objectives:*

To help museum professionals to define the criteria for choosing a particular software and to establish priorities for the functions that a system can perform.

*Target:*

Canadian heritage professionals primarily, but not exclusively.

*Accessibility:*

The checklist can be downloaded in PDF, Word or Excel format. It is available in English and French. The check list is not directive: it is up to users to choose what they think they need.

- *Capture Your Collections, Small Museum Version:* (English/French)

[http://www.chin.gc.ca/English/Digital\\_Content/Small\\_Museum/index.html](http://www.chin.gc.ca/English/Digital_Content/Small_Museum/index.html)

*Numérisez vos collections, Version pour les petits musées :*

[http://www.rcip.gc.ca/Francais/Contenu\\_Numerique/Petits\\_Musees/index.html](http://www.rcip.gc.ca/Francais/Contenu_Numerique/Petits_Musees/index.html)

*Overview:*

This good online training course has been specially designed to help volunteers, curators and managers working in regional, local and specialist museums, to better manage the process of image digitisation. The tutorial, divided into 9 modules, goes from fundamentals (technical information on images and digitisation) to managing images, going through costs, legal issues, standards, etc. Exercises are provided to assist with planning for a digitisation project.

*Objectives:*

Help to better manage the process of image digitisation.

*Target:*

Volunteers, curators and managers working in small regional, local and specialist museums

*Accessibility:*

Easy to read and coherent resource, available on line only but easily printable. It is available in French and English. It does not apply to any museum in particular, so can be used by all.

## **2- Contacts with institutions**

After a quick review of existing resources to determine their authors and/or distributors, and after reviewing major museum networks in developing countries, e-mails were written and sent by Ms Isabelle Verger of ICCROM to various organisations such as CollAsia, CIDOC (The International Committee for Museum Documentation), MDA (Museum Documentation Association) and ILAM (Instituto Latinoamericano de Museología). The aim of the message was to inform the recipients on the project by sending them a summary of the final report of the first part of the project (the survey and evaluation meeting), informing them on the aims of the current phase of the project, and a request for comments and suggestions.

Were thus contacted Patcharawee Tunprawat, Project coordinator, and Katriina Similä, Project Manager at CollAsia, Gordon McKenna, MDA Standards and Systems Manager, Richard Light, Chair of the CIDOC Documentation Standards Working Group, and Christina Tsagaraki, Projects Coordinator at ILAM.

The responses to the messages were positive. Those who responded (50% response rate) expressed their will to share information and participate in the project in one way or another.

## 2-1 ILAM

According to Ms Tsagaraki, the general tendency in Latin America is that (1) museums, regardless of their size, do have some sort of registration system, at least in hard copies - they differ in this from the surveyed African museums; (2) small museums with public collections (mainly archaeological ones) often do not have a registration system (or even are not allowed to have one) because the institution from which they depend manages the system (Dirección de Museo, Dirección de Patrimonio, etc.) and (3) when it comes to computerized systems it is an open problem due to lack of technology and money, but most of all, of adequate software (adapted to their needs, preferably in Spanish, cheap to maintain and compatible with other systems). In general, museums create their own systems using Access, File Maker, or ISIS / Winisis, or they modify free existing software. Although their main concern is to protect the artefacts from theft, there is a growing demand that the system is more than a mere protection tool but a basis for interpretation of the collections.

She further stated that if there was a project to be launched locally, she suggested as main activities: 1- to carry out a survey to find out exactly what is used in Latin America (computerised or manual systems), who is in charge, what fields are used, etc.

2- to study the possibility of creating a “unified” program that can be distributed to the interested museums and can easily be updated and maintained locally.

She insisted on the computerisation of documentation systems because for her, many museums, even the smaller ones, would be able to do that. An alternative would be some sort of manual for minimum fields and a glossary in Spanish that could be distributed as guidelines to harmonize registration systems.

It is to be noted that ILAM offers an online workshop “Talleres ILAM: Registro y Catalogación” (ILAM workshop: Registration and Cataloguing). It has been given three times with a total of 60 participants from different countries and institutions.

## 2-2 CIDOC

Mr. Richard Light, apart from giving references on online material published by AFRICOM, CIDOC and MDA, stated that the survey results suggest that the selected museums face the same problems that beset small museums everywhere in the world. So the African situation is not unique, which means that the proposed material may benefit a great portion of small museums worldwide.

He assured of CIDOC’s interest in providing such support as they are able, to help develop and then disseminate new material which provide a different slant on basic documentation advice, if such a material should be developed.

## Conclusion

This study enables us to realise that there are sufficient interesting and useful resources available on line on the question of documentation of museum collections.

In view of the stage which information and professional practises have reached on the subject, it seems to us that **it is necessary that we should come to a form of standardisation**. As it is, many information and technical documents provided resemble each other or are very close to each other in their ideas and form. They all seem to have come to the same conclusions and same “best practice” criteria, but seemingly without consulting one another. In this situation, drawing up new resources will only add a line to the list of available resources or sites. Is this really ICCROM’s or UNESCO’s role?

It seems to us that museum professionals and specialised institutions should take time to concert each other and think about this issue to normalise (standardise) professional practices instead of developing similar projects in parallel or successively.

In order to progress and to add something to what already exists, two levels of standards are necessary:

1- the immediate standard which is directly related to the subject of our survey, i.e. documentation of collections. What do professionals and specialised institutions mean by documentation of collections and what forms should it take? The answer to this question should enable every museum to orientate itself and reassure itself on what it should do. Also, the support of international cooperation provided by UNESCO and ICCROM in particular, would be made easier.

2- but a second or first level of standardisation is also necessary: what do professionals and specialised institutions mean by Museum? A minimum of accreditation is useful nowadays in order for the museum institution to progress and to better orientate available resources in terms of supporting development. One should only support institutions which adhere to this system of minimum accreditation. This support could consist, for « small museums », in helping them in the implementation of the elements necessary to be accredited. But who will define these “elements” so that they are accepted internationally? How will this list of basic elements for minimum accreditation be disseminated?

For example, for EPA, a museum should recognise explicitly and formally in its statutes that it adheres to the ICOM Code of Ethics or to a similar code if it exists! Of course, one would have to go a little further and stress in the Code the technical elements that a museum should set up, such as the documentation of its collections for example.

The resources that we suggest hereafter which have been taken out of the studied resources must therefore be considered as basis for discussion towards a minimum of standardisation of documentation in all its components. In any case, it is those resources that are similar despite the disparity of authors, which seemed to answer to essential needs and which are easy to understand and simple to implement.

From this point of view, in the various resources that we analysed, the ones that will be of great use in the projected material are the ones provided by MDA, the French Ministry of Culture, AFRICOM, National Park Services, UNESCO and CIDOC for subjects **on introduction to documentation, registration and cataloguing**. We regret that most of these resources are in English only (MDA, National Park Services), MDA having the widest selection of resources. Non English speaking countries will therefore be disadvantaged in so far as quantity and variety of information is concerned. For any input on **standardisation and thesauri**, MDA (factsheet), AFRICOM, ICOM and Willpower Information resources can be used, and to a lesser degree the Joconde terminology for materials and techniques, and the Getty thesauri.

The excellent CHIN online tutorials and criteria checklist are ideal as a central resource for the projected material, if **computerisation** is dealt with.

ILAM and CIDOC have shown their enthusiasm and will to participate in the project, either through providing technical/scientific support in the elaboration of didactic/advice material or for the enlarging of the survey to Latin America, more specifically in the area of computerisation. These two institutions could therefore be partners for the future actions of this project.