

Museum documentation

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Aim and objectives

- This presentation intends to present what **documentation for museums** implies, as well as **what, why and how** documentation of heritage collections can be realized.
- The **objectives** of this presentation are to:
 - Explain the core concepts of museum documentation
 - Describe why and how heritage collections are documented
 - Highlight what to document when dealing with the objects of a collection
 - Present appropriate tools for documentation of a heritage collection development project

- At the end of this presentation, you will be able to:
 - Describe the three main processes when documenting heritage collections
 - Identify two broad information categories to describe an object of a heritage collection
 - Explain the two things documentation in museums focuses on

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Core concepts



- **Previous** presentations focused on digital (i.e. software) and physical objects (e.g. computer hardware, home appliances, etc.)
- **Documentation** was defined in terms of these objects
- What about **works of art and antiquities** typically found in museums?

*Museum documentation is concerned with the development and use of information about the **objects** within a **museum collection** and the **procedures** which support the management of the collection.*

- From this definition, do you see the analogy with **product** documentation (objects) and **process** documentation (procedures)?

Why document?

- Museums acquire **objects** and create **collections**
- When an **object** is **moved** from its place of origin and its context, its **significance** is **reduced** and becomes more **reliant on** the **documentation** linked to it.
- When an object **arrives at a museum**, it begins a “new life”: it will be studied, positioned, exhibited, restored, loaned and transferred
- It will thus be necessary to **identify it in a unique way**, and to facilitate the management of every aspect of this new life
- The **value of a collection**, its safety and its accessibility therefore depend to a large extent on the **quality of the documentation** associated with it.

- When objects are not properly documented there is a huge difficulty to find and return objects to their **rightful owners**
- A great number of **stolen goods** can't be investigated by the competent authorities due to the lack of identification documents
- With **effective documentation**, a museum should be able to facilitate:
 - collection policies
 - collection care and accountability
 - collection access, interpretation and use
 - collection research



Source: <https://museumnotes.blogspot.com>

- According to the **ICOM Code of Ethics**, documentation should include a full identification and description of each object, its associations, provenance, condition, treatment and present location.

- Specifically, **it can include:**
 - Detailed description of the object and supplementary useful information
 - Certificate of authenticity
 - Export or import certificates
 - Exhibit or auction catalogues
 - Loan and acquisition documents
 - Inventory documents
 - Related written materials (e.g. research and field collection notes)
 - Documents informing about the origin of the object
 - Documents informing about the intellectual property rights of the object
 - Photographs
 - And other relevant documents...



- **Spectrum** is the “UK Museums Collection Management Standard” used or adapted for use in several EU countries (e.g. Germany)
- In its **initial versions** it was called “The UK Museum *Documentation Standard*” and its core content has not changed much until its current version 5.0
- It determines a set of **procedures** that define all required activities that museums need to do when managing their collections
- There are 21 procedures and 9 of them are marked as **primary**
- In the UK, a museum cannot be **officially accredited** if it does not have the primary procedures in place and working effectively.

Primary procedures



- Object entry*
- Acquisition and accessioning*
- Location and movement control*
- Inventory*
- Cataloguing*
- Object exit*
- Loans in (borrowing objects)*
- Loans out (lending objects)*
- Documentation planning*

All these museum procedures show the complete range of **where** documentation should be applied in a museum environment



Other procedures



- Condition checking and technical assessment*
- Collections care and conservation*
- Valuation*
- Insurance and indemnity*
- Emergency planning for collections*
- Damage and loss*
- Deaccessioning and disposal*
- Rights management*
- Reproduction*
- Use of collections*
- Collection review*
- Audit*

Documentation of heritage collections



Why document heritage collections?

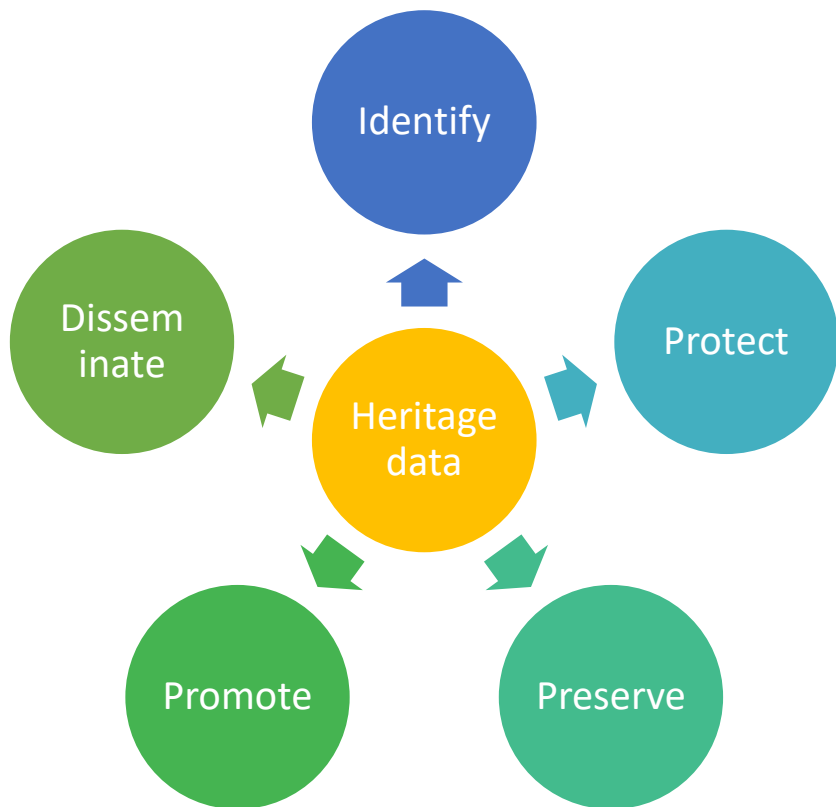
➤ Heritage institutions have **two responsibilities** that make the documentation of collections important:

- **Responsible** collection management, which is ensured through the identification, protection and preservation of collections.
- Collection **interpretation** and **development**, which is ensured both through access to information and through access to collection objects.



Source: <https://auction.catawiki.com>

➤ The **best way to preserve collections** is not only to preserve their physical integrity, but also, and more importantly, to **acquire in-depth knowledge of them** and to be able to identify and interpret them correctly.



Proper documentation facilitates:

- ✓ identification of objects
- ✓ recording and maintenance of the museum's objects
- ✓ access to the objects
- ✓ object protection and preservation
- ✓ access to information
- ✓ updating of information
- ✓ preservation of information

How to document heritage collections?

- When undertaking a **collection documentation** project, you must determine the most appropriate **method**.
- There are generally **two steps** to follow in documenting collections



Inventory



Cataloguing



- An **inventory** is a systematic record of all the elements that make up a collection.
- A **process** that consists of **counting** and **describing** the elements that make up the assets of a group, of a succession, etc.
- In the context of **heritage collections**, it involves systematic survey of all the elements that make up the collections as such.
- From an **information standpoint**, it involves choosing the volume of information to be collected for each object in the collection.
- This process enables you to distinguish between **two types** of inventories: **counts** and **physical inventory**.

- The **counts** process should answer three basic questions:
 - What objects make up the collection?
 - How many objects are there?
 - Where are these objects located?
- The **advantage** of counts is that, quickly and with few resources, you can clearly **identify** all the objects, **count** them, and determine their exact **location**
- However, the information is quite often **too limited** for the collections to be properly understood and promoted
- Each **heritage institution** should, at the very least, have such an inventory of its collections



- A **physical inventory** implies that the inventory process is more detailed with information on the **physical characteristics** of objects:
 - the **materials** and **technique** of which the object is made
 - the object's **size** or **dimensions**
 - the object's **decorative motifs**
 - **inscriptions** found on the object
- The **advantage** is that it gives us access to a more detailed description of the objects allowing for:
 - better **understanding** of the collections
 - anticipating their **storage** and **preservation needs** more precisely
 - obtaining **photographic reproductions** of the objects
- Requires **more time, human and financial resources** than counts



- **Cataloguing** generally involves in-depth research by experts
- Requires a **significant investment** in research time and specialists
- **Collected information** covers contextual information and our scientific understanding of the object, as well as its history, both before and after it has received heritage status
- This type of process is reserved for **major pieces** of the collection and for objects used in dissemination projects
- The **advantage** of cataloguing is that it provides much more detailed information on the collections, and thus fosters both efficient management and in-depth knowledge of the collections

Which process to choose?

- Most of the projects are referred to informally as **inventories**, regardless of the quantity of information collected and recorded
- The **nature** and **quantity** of the **information** collected during a collection's documentation process must be **based on**:
 - the desired objectives
 - the collection's nature
 - the type of information to be recorded;
 - the accessibility and reliability of the information already available.



- Obviously, the choices are based on our **information needs** and on the **resources** that we have at our disposal to carry out the work.

Descriptive systems



What to document?

- Previous slides showed **why** and **how** to document collections
- Let's see **what** exactly we need to document when dealing with the objects of a collection
- It is very possible that the **descriptive information** of each object can be classified in the following **broad information categories**:
 - **Object's physical characteristics**: identification, size or dimensions, technique, colors, shape, decorative motifs, materials, inscriptions or description
 - **Scientific understanding of the object**: artist/manufacturer, place of construction, place of origin, previous owner(s), acquisition mode and date, use, culture, etc.

- There will always be **new information** to gather on the collections and the following are some examples:
 - ❖ Activities for which the collections are used in the institution
 - ❖ A specialist's new understanding of a work or a style
 - ❖ Specifying the new conservation condition of a damaged object
 - ❖ Reflect a change in the Latin taxonomy of a natural sciences specimen following new scientific research
- The documentation process does not have an end, it is **dynamic and continuous**

- In a **collection development project**, we look forward to a detailed and comprehensive description of each object in the collection
- **It is fundamental to be able to answering these questions:**
 - What information needs to be recorded?
 - Where is the required information located?
 - How do we organize the information?
- Information of an object or a collection is only **complete** when it is **recorded properly**, organized in a **functional system**, and becomes **available** and **accessible**, both within and outside the institution
- An efficient **descriptive system** involves a logical, structured organization of the information for each collection object.



- It is a logical, ordered and meticulous **organization of information** that pertains to the collections
- It is **efficient** when information as a whole is able to be grouped and organized hierarchically into a unique system
- It establishes a number of rules or standards which are called **data structure standards** and **metadata schemes**
- The descriptive information on the collections is divided into a fairly large number of **information fields** (or metadata elements)
- These elements of information are then grouped and structured logically by **information category** → **retrieval** and **exchange**

- It is an **indicative example** of a descriptive system
- Its **principles** are similar to the core ones of many other systems
 - Information organized according to type of collection to be documented
 - Information divided into defined elements
 - Information organized into logical groups
 - Proposed "basic Cataloguing Form" which can include a number of mandatory information elements as well as recommended information elements
 - Proposal for a more detailed group of cataloguing elements
 - Proposed rules and conventions for entering data
 - Proposal of controlled vocabularies for certain elements
 - Ability to maintain links between objects, between objects and their parts, or between a group and the individual objects composing the group

➤ By providing a common structure it **achieves** two things:

- Creation of a **central reference database** on the institution's collections
- Facilitation of the **exchange of information** with other users and systems



➤ More information on **internationally recognized description standards or metadata schemes** for documenting and managing collections can be found [here](#).

- CIDOC, *Statement of principles of museum documentation*, version 6.2, June 2012, section 1.1 (http://network.icom.museum/fileadmin/user_upload/minisites/cidoc/ConferenceGuidelines/principles6_2.pdf)
- https://www.obs-traffic.museum/sites/default/files/ressources/files/EP_A_Documentation_Museum_Collections.pdf
- https://www.obs-traffic.museum/sites/default/files/ressources/files/ICOM_Ethics_Code_EN.pdf
- <https://collectionstrust.org.uk/spectrum/spectrum-5/>



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