INTERNATIONAL MUSEUM ACADEMY MYANMAR: 2017

TOOLKIT: MANAGING COLLECTIONS AND COLLECTIONS INFORMATION

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SECTION 1: INTRODUCTION

Museums have a commitment to provide access to their collections, as well as to develop and care for them. In a digital age, museums are becoming increasingly aware of the enormous potential offered by the digitisation of collections and collections information; we are now able to reach new audiences, find out more about our collections, promote them and share them all over the world.

Digital possibilities are exciting and innovative – however museums are finding that, as they ‘go digital’, they need to ensure that their collections information is collected and cared for in a way which ensures that it is accessible and safe, as well as easy to digitise and re-use. Increasingly we are realising that digitisation needs to be implemented in the context of a sound and accountable information system within the museum.

This information system, often known as a ‘documentation system’, is stored in many different places in the museum – in registers, in databases, on cards, in curator’s notes, in paper files. All of this information needs to be organised into a workable and accountable system, before a museum starts to consider digitisation.

This toolkit will support you to put a basic museum documentation system in place in your museum, so that you:

- Know what you have in your museum
- Know where all of the objects in your care are located
- Know how you obtained the objects in your collection, and why you have them

Having this knowledge will give you the building blocks you need to embark on digitisation projects, which could provide access to your collections worldwide.

SECTION 2: WHAT IS IN A MUSEUM DOCUMENTATION SYSTEM?

Organising information into a system

Because documentation is collected in a variety of ways and by different people, it is good practice to organise its collection and storage in a 'documentation system' so that information about objects can be kept in a standard and secure way for future use.

For this reason it is good practice to create standardised procedures, and record structures in museum documentation systems. There are strong arguments for doing this, including:

- **Accountability** – your museum has a duty of care to the objects in your collection and the information associated with them. Public money has been spent on their acquisition, care and security, and that money will be wasted if you don't know, for example, what is in your collection, its importance, or its location.
- **Consistency** – Standard procedures are tried and tested; they work well for most museums and all types of collection. If, for example, objects are always recorded using agreed terms and formats, then it is very easy to find information in the system.
- **Information sharing and public access** – most museums want to share information about their collections. Sharing promotes your museum; it raises the profile of your collection and will increase visitor numbers and public access. The benefits of sharing are hugely increased with the opportunities offered by digitisation and the internet. However, if the information you hold about your collections is held in a chaotic and inconsistent system it will be very difficult to share it easily.
- **Security –** it is easier to keep your records safe if they are kept in standardised formats and conditions. For example, if your registers are always made of archival quality paper they will last longer, or if you have a back-up routine for your digital database you will reduce the risk of losing information.

Digitising collections information

Digitising collections information will mean that it is easy to share, and re-use, for example, data in a digital database is much easier to re-use compared to data on individual catalogue cards.

Although digitisation can bring great benefits, it has to be approached in a planned way. It is not a miracle cure. It is a powerful tool but if it is to be to give good results, it requires the underlying documentation system to be well thought out and the data to be well organised. Computerising badly organised data is a recipe for chaos, and could prove very expensive in the long term.

In practice most museums never digitise their whole documentation system – they will probably digitise their catalogue and location records and maintain the rest of the system on paper. This is a sensible approach as it allows the museum to build rich and detailed catalogue records in a digital database, whilst maintaining the records associated with, for example loans, on paper. A digital database for museums is often called a **collections management system**.

A museum documentation system consists of:

- **Mission**

Your museum's mission is relevant to your documentation system. It should reflect the fact that your museum exists to care for, safeguard and provide access to your collection and its associated information.

- **Policies**

As you develop your documentation system, you will develop policies which are relevant to your procedures. For example you will develop an Acquisition Policy and a Disposal Policy.

- **Procedures**

Procedures is the term given to collections management activities such as condition checking; acquiring objects; lending objects and moving objects. The term describes everything that you *do* when you are carrying out collections management tasks.

- **Records and back up records**

Records describe the records that are created when procedures are carried out, for example accession registers, catalogue records, or loan records. Records might be on paper or they might be digital. For most museums many records in the system will be on paper. Important records are always backed up.

- **Data**

The term 'data' describes the information that is collected by the museum when the procedures are carried out and the records are made. Data can be held digitally or on paper and is captured in named '**fields**'. Museums always try to capture and store 'core data' or core information' about their collections before they capture more complex information. Core information is:

  - Object number
  - Object name
  - Object description
  - Object location
  - How the object was acquired
  - Who it was acquired from
  - Date acquired

- **History Files**

Usually filing cabinets which contain things like letters from donors.

- **A Procedural Manual**

A document which describes how your documentation system works for all members of staff

- **Documentation Plans**

Project pans to improve the quality of the information you hold about your objects.

- **Numbers on objects**

The whole documentation system is held together by object numbers which are attached or applied to the object. The object number ties the object to the records you hold about the object.

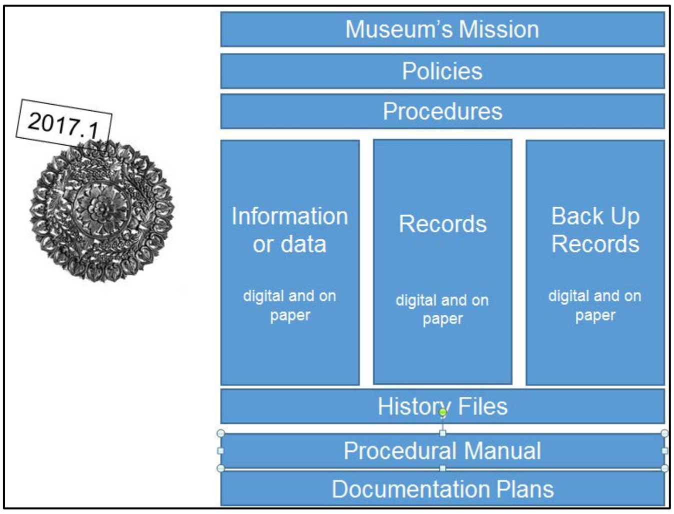


Diagram showing the components of a museum documentation system

Most museums start to organise their documentation by organising a **basic museum documentation system**, concentrating on a small number of procedures, which, once they are in place, will guarantee that when used properly the museum is accountable for all of the objects in its care. By accountability we mean, that the museum:

- Knows which objects are in its care
- Where all objects are located
- How it obtained all the objects

The procedures in a basic documentation system, are often called the **Primary Procedures** and operating these procedures will make sure that you collect core information about the objects in your collection. If Primary Procedures are not in place you will find that you will quickly lose track of your collection, and you will not be able to collect further information about it, or digitise it, or use or develop it in any way.

These are the Primary Procedures which form a basic museum documentation system:

- Object entry
- Acquisition
- Cataloguing
- Loans in
- Loans out
- Location and movement control
- Object exit
- Retrospective documentation

SECTION 3: OBJECT ARRIVAL PROCEDURE

The object arrival procedure is used whenever an object enters the museum, for any reason.

Do you need to use this procedure in your museum?

You must use this procedure in your museum if:

- You take objects in from the public as possible donations or purchases for your collection
- You buy an object for your collection, and there is a period of time between the time it arrives at your museum and the time that you are able to accession it
- You go out of your museum to collect an object from a donor
- A member of the public leaves an object at your museum for your opinion
- You take an object into your museum so that your museum can carry out conservation work on the object, or carry out some research.
- You borrow an object from another museum

Note that all of the above are situations where objects have come into the museum but are possibly not going to become part of your long term collection. They are objects which may be in your care for a limited time, and will be returned to their owners, but while they are in your care you must know:

- What they are
- Where they are located
- Who they belong to and why you have them

Setting up the object arrival procedure

Most people set up the object arrival procedure by:

1. Agreeing a policy for taking objects into the museum. This need only be a short written statement which describes:

- The situations where you will and will not take objects into the museum
- Who is authorised to take objects into the museum
- The format of your object arrival forms
- How long you will keep objects before returning them to their owners
- How you will look after objects while they are in your care. Usually museums will commit to looking after objects that have entered the museum under the object arrival procedure to the same standard as the objects in their long term collection
- How your object arrival records will be kept safely

This statement is usually communicated to all staff so that they feel confident about the carrying out the procedure, or know that they should not carry out the procedure. Policies are formal documents that are agreed at a high level in the museum.

Some museums also make a short leaflet, which is kept at the museum desk, which helps visitors understand the museum's policy about taking in objects.

2. Creating an object arrival form. This form is usually on paper, in triplicate. Each form is numbered with an arrival number. It is often kept at the museum desk and a receipt needs to be given to the owner. There is an example of an object arrival form in **Section 15** of this toolkit.

In this procedure, core information is recorded. On the form you will need space to record:

- Object arrival number - this is a unique number which is written on the form and attached to the object.
- Description of the object
- Historical information about the object
- The location of the object
- Owner's name and address
- Signatures of the museum representative and the owner
- Reason for the object being taken into the museum
- Return signature

Forms are usually two sided, with conditions of the deposit written on the reverse, each form is in triplicate:

- The top copy of the form is retained by the museum in an arrival file in arrival number order.
- The second copy is given to the depositor as a receipt.
- The third copy is kept with the object

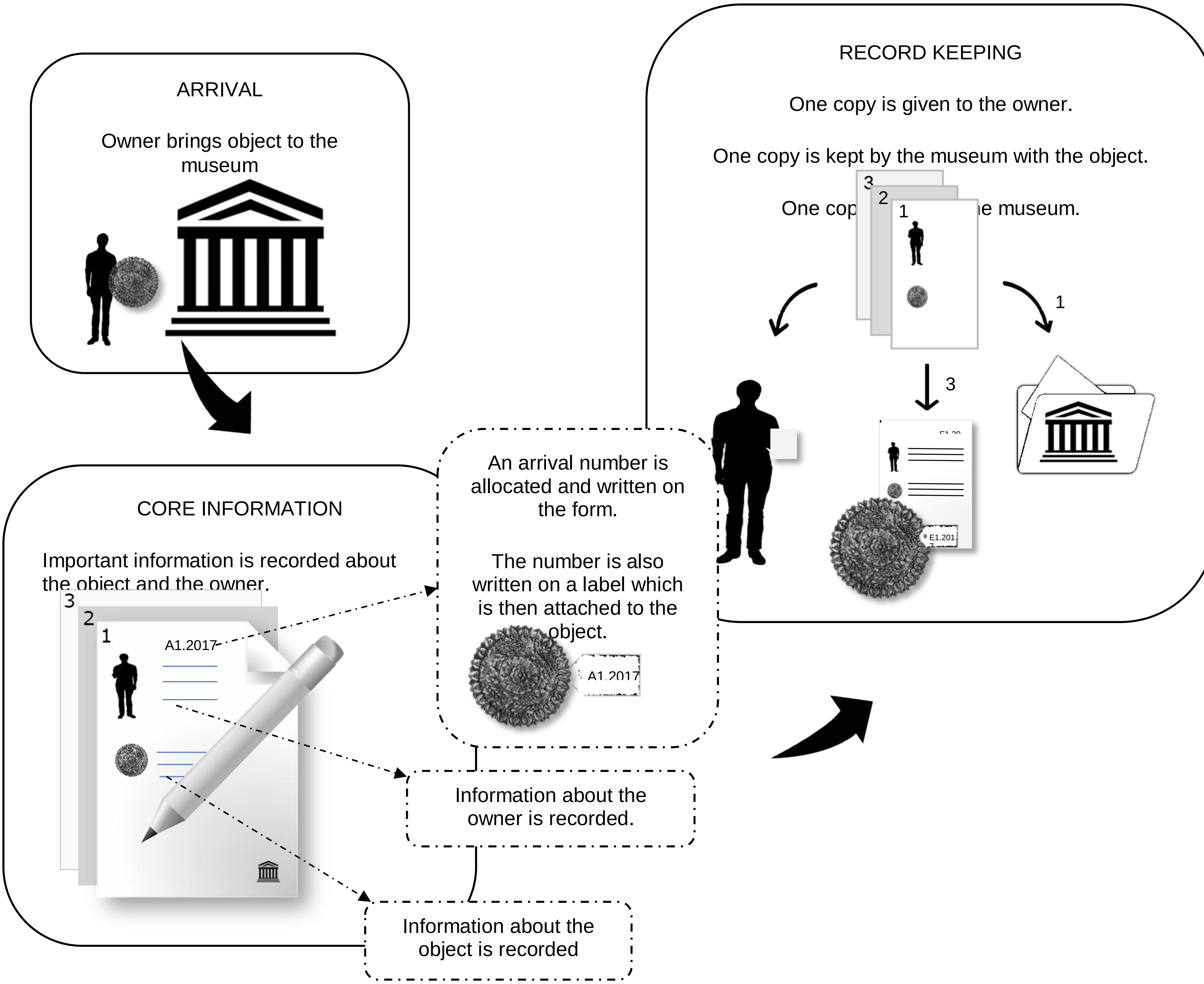
3. Agreeing how the procedure will be carried out in your museum. This need only be a short description of how the procedure will actually work in your museum. This description will be stored in your museum's procedural manual. The details in this statement will be very practical, including:

- Reference to the arrival policy
- Who is responsible for carrying out the procedure
- Examples of the forms you use, how to fill out forms
- Arrival number formats
- Where blank forms are stored
- What happens to completed forms and how they are stored
- Guidance about the discussion you will have with owners of objects arriving at the museum

Carrying out the arrival procedure

In this procedure you will:

- Refer to your museum's policy about object arrival
- Allocate an object arrival number and record the number on the object arrival form
- Have a conversation with the owner to:
    - Capture information about the object through discussion with the owner
    - Capture information about the owner
    - Record the reason for the object coming into your museum
    - Discuss your museum's policy about objects arriving at the museum – how will you look after their object? how long will you look after their object?
    - Discuss your museum's acquisition policy – the owner needs to understand that, if this is a proposed donation, your museum may still not accept it in to the collections
- Provide a receipt for the owner – this can be through the form, or a separate receipts system
- Tie the arrival number on the object


ARRIVAL
Owner brings object to the museum
CORE INFORMATION
Important information is recorded about the object and the owner.
3
2
1
A1.2017
An arrival number is allocated and written on the form.
The number is also written on a label which is then attached to the object.
A1.2017
Information about the owner is recorded.
Information about the object is recorded
RECORD KEEPING
One copy is given to the owner.
One copy is kept by the museum with the object.
One cop
e museum.
3
2
1
1
3
E1.201

BRITISH COUNCIL

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SECTION 4: ACQUISTION PROCEDURE

The acquisition procedure is used whenever an object, or group of objects acquired from a single source, are accessioned into the museum's long term collections.
Accessioning is the formal acceptance of acquisitions into the long term collections. It is usually carried out as soon as possible after an object, or group of objects, has entered the museum (via an object arrival form) and it is decided that the object(s) should enter the long term collections.

Accessioning should take place as soon as possible after the object is accepted into the collections. Loans are never accessioned.

Do you need to use this procedure in your museum?

You must use this procedure in your museum if:

- You hold a long term or permanent collection of objects which are in the permanent care of your museum

Using this procedure will make sure that you:

- Know which objects are in your long term collections
- Where those objects are located
- How you acquired them – it will also give you formal evidence that you also own the object.

Setting up the acquisition procedure

Most people set up the accessioning procedure by:

1. **Agreeing an acquisition policy** for adding objects to the long term collections. This will describe:
   - Your current collections
   - The types of objects which your museum will accept into the long term collections.
   - The types of objects which your museum will not accept into the collections – this includes a statement about not acquiring stolen objects, or objects from endangered species.
   - The terms and conditions under which objects are accepted into the long term collections.
   - Guidelines and constraints regarding storage, transport and conservation/care considerations which will may need to be taken into account before acquiring new objects
   - Guidelines regarding the intellectual property rights that the museum normally expects to acquire with an object.
   - Which members of staff are authorised to accept objects into the long term care of the museum.
   - How the accession register will be kept safely

This statement is usually communicated to all staff so that they understand that the museum has a mission to develop its collection in a particular way. Some museums publish their acquisition policies on their websites, or in annual reports.

2. **Creating an accession register.** Accession registers are bound registers, on archival paper, with numbered pages. Entries should be made in permanent ink, in accession number order. They are always stored in a secure place – many museums store them in a fire-proof safe. Handling of registers should be kept to a minimum, they are not working documents.
Most museums keep a photocopied **back-up accession register** in a separate location off-site.

There is an example of accession register pages in **Section 15** of this toolkit. .

The accession register captures **core information** about the object, much of which is transferred from the object arrival form. Core information in an accession register should include:

- Entry number
- Accession number
- Date received or accessioned
- Acquired from (Name and address of vendor or donor)
- Acquisition method
- Simple name/basic description/identification and historical information
- Initial location

Some museums also use **transfer of title forms** which are signed by owners and the museum as a formal statement that ownership has been transferred. It is not absolutely necessary to use transfer of title forms and is a decision for individual museums.

3. Deciding on the accession number formats you are going to use - see **Section 10** in this toolkit.

4. Setting up an object history file. Documents related to the acquisition, such as bills of sale or letters, are stored in large envelopes in a metal filing cabinet. Each envelope is marked with the accession number, and all are stored in accession order.

5. Deciding on labelling and marking techniques. Objects are labelled and/or marked with their accession numbers using techniques which are semi-permanent and do not harm the object. See **Section 11** of this toolkit.

6. Agreeing how the procedure will be carried out in your museum. This need only be a short description of how the procedure will actually work in your museum. This description will be stored in your museum's procedural manual. The details in this statement will be very practical, including:

- Reference to the acquisition policy
- Who is responsible for carrying out the procedure
- An example of the accession register and how to fill it in
- Accession number formats
- How marks and labels are attached to objects
- Where the accession register is stored
- How the accession register is backed up and where the backup is stored

Carrying out the accessioning procedure

In this procedure you will:

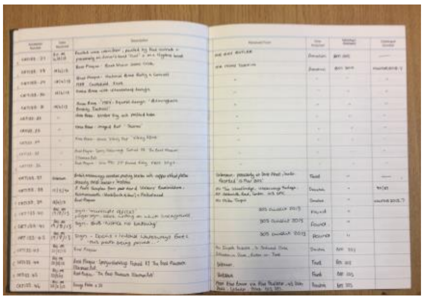
- Refer to your museum's policy about accessioning – has a formal decision which refers to your policy been made about the object you are about to accession?
- Allocate an unique accession number using your museum's number format
- Make an entry in the accession register
- Attach the accession number to the object using a mark and/or label
- Send the donor a thank you letter - if the acquisition is a gift, a letter is sent to the previous owner telling them that is has been accepted by the museum into the long term collections.
- Formally transfer ownership of the object to the museum – if the object is a purchase, the invoice or receipt is all the evidence you need to prove that ownership has passed from the previous owner to the museum. If the object has been acquired through donation, all of the above accessioning steps, together with the data you collected on the Entry form, will help to prove that you now own the object, however, some museums also use a transfer of title form.
- Store any related documents from the accession in the object history file.

The accessioning workflow

ACCESSION REGISTER

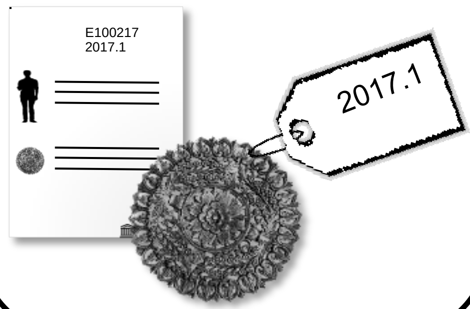
New objects are listed in the accession register.

They're given a unique accession number.



LABELLING & NUMBERING

The accession number is added to the entry forms, the object label and the object.

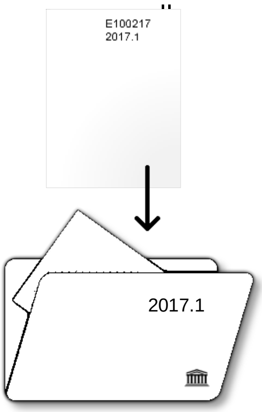


LETTER OF THANKS

A letter of thanks is sent to the owner to acknowledge their donation

OBJECT HISTORY FILES

Any receipts and letters should be filed in a history file. You can also file the object's arrival form here



SECTION 5: CATALOGUING PROCEDURE

The cataloguing procedure is used to bring object information together so that it is easy to search. Cataloguing records contain the core information about the object, as well as more complex information about the object – such as condition, or use in exhibitions. Catalogue records do not have to contain all of the information you hold about an object, but they need to cross reference to other information held elsewhere, such as condition reports.
Catalogue records are usually used to store location information about objects, and are usually the first records in the museum to be digitised. In a few museums they are still held in card systems.
Catalogues are very useful if you have backlogs because they provide an easy way of searching your collection under a variety of terms.
Cataloguing is carried out as soon as possible after accessioning.

Do you need to use this procedure in your museum?

You must use this procedure in your museum if you want to:

- Be able to record information about your collection which is searchable (it is not advisable to use your accessions register as a searching tool)
- Build an archive of the history of the object before and after its acquisition by your museum

Setting up the cataloguing procedure

Most people set up this procedure by:

1. **Agreeing a policy** for cataloguing. This need only be a short written statement which describes:
   - Which data you want your catalogue record to capture – this will usually be core data to start with
   - How you are going to control the terms (terminology control) you enter into your catalogue record
   - Any classification systems you use
   - The format of your catalogue records – will they be digital or on paper?
   - Who is responsible for cataloguing
   - How your catalogue records will be kept safely. Catalogue records kept on card are not usually backed up, however if they are stored digitally they will need to be backed-up regularly

This statement is usually communicated to all staff so that they understand the purpose of the catalogue records, and who is responsible for keeping them.

2. Creating a catalogue record

The catalogue record can be digital or on paper.
If the catalogue is on paper it will have a series of index cards which lead back to the catalogue records themselves. Many museums, particularly long established museums start with card catalogues and move to digital. If a museum has no catalogue records at all, it will often start digitally; however this is a step which needs to be planned carefully, as mistakes can be expensive. You can see an example of a card catalogue record in **Section 15** of this toolkit.

'Core information' is captured during cataloguing. On the form you will record:

- Accession number and entry number
- Object name
- Title (for example, in the case of a painting, book, or sculpture)
- Description of the object
- Location of the object
- Any classifications that you use

- Recorder name and date

Some of this data will be drawn from the arrival form and the accession register. You can plan to record further information, depending on your collection, however, remember that it is better to hold core information for everything in your collection, rather than very detailed records about only a few objects. Further information could include:

- Cross references to other information in your system, perhaps held in loans files, conservator's records of photographic records.
- Aspects about the history of the object, for example people or places associated with the object
- Details about the exhibition of the object
- The material that the object is made from, or how it was produce
- Valuation
- Notes – a notes section for any further information

Data in some fields will be controlled in some way, so that it can be searched for easily. You will probably want to control the way you enter:

- Place and people's names
- Dates
- Object names
- Museum locations
- How you obtained the object – e.g. are you going to use the term 'donation' or 'gift'?

3. Agreeing how the procedure will be carried out in your museum. This need only be a short description of how the procedure will actually work in your museum. This description will be stored in your museum's procedural manual. The details in this statement will be very practical, including:

- Reference to the cataloguing policy
- Who is responsible for carrying out the procedure
- An example of the catalogue card you are going to use and how to fill it in
- Any terminologies that you use
- Where the catalogue is stored
- How the catalogue is backed up (if ii is backed up) and where the backup is stored

Carrying out the cataloguing procedure

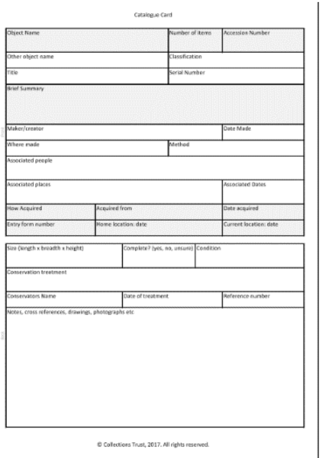
In this procedure you will:

- Refer to your museum's cataloguing policy – how much information will you record for a new acquisition?
- Create the catalogue record using information from the arrival form and the accession register and the object itself
- Control the data you are entering into some fields
- File the catalogue record if using a card system
- Create index cards if using a card system
- Return the object to its location which is recorded on the catalogue record

Cataloguing workflow

CREATE THE CATALOGUE RECORD

Complete the catalogue form using information from the Object Arrival Form, Accession Register, and the object itself.


Catalogue Card

Object Name	Number of items	Accession Number
Other object name	Classification	
Title	Serial Number	
Brief Summary		
Maker/creator		Date Made
Where made	Method	
Associated people		
Associated places		Associated Dates
How Acquired	Acquired from	Date acquired
Entry form number	Home location: date	Current location: date

Size (length x breadth x height)	Complete? (yes, no, unsure)	Condition
Conservation treatment		
Conservators Name	Date of treatment	Reference number
Notes, cross references, drawings, photographs etc		

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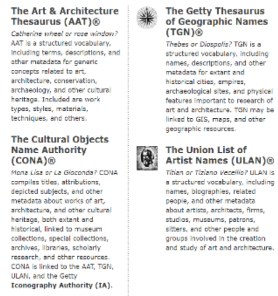
CONTROL THE DATA

Using terminology control and recognised thesauri makes information consistent and easier retrieve.

Use, adapt or create your own term lists, ssification systems.

Powerhouse Museum Object Name Thesaurus


The Art & Architecture Thesaurus (AAT)®

Catherine wheel or rose window? AAT is a structured vocabulary, including terms, descriptions, and other metadata for generic concepts related to art, architecture, conservation, archaeology, and other cultural heritage. Included are work types, styles, materials, techniques, and others.

The Cultural Objects Name Authority (CONA)®

Mona Lisa or La Gioconda? CONA compiles titles, attributions, depicted subjects, and other metadata about works of art, architecture, and other cultural heritage, both extant and historical, linked to museum collections, special collections, archives, libraries, scholarly research, and other resources. CONA is linked to the AAT, TGN, ULAN, and the Getty **Iconography Authority (IA)**.

The Getty Thesaurus of Geographic Names (TGN)®

Thebes or Diospolis? TGN is a structured vocabulary, including names, descriptions, and other metadata for extant and historical cities, empires, archaeological sites, and physical features important to research of art and architecture. TGN may be linked to GIS, maps, and other geographic resources.

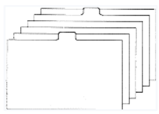
The Union List of Artist Names (ULAN)®

Titian or Tiziano Vecellio? ULAN is a structured vocabulary, including names, biographies, related people, and other metadata about artists, architects, firms, studios, museums, patrons, sitters, and other people and groups involved in the creation and study of art and architecture.

USING A CARD SYSTEM

Create an index card

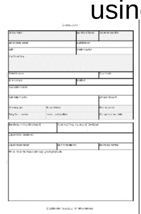
Create index cards so that you can search the main card system using controlled terms



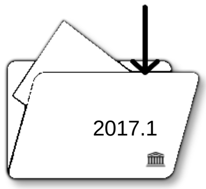
OR, IF YOU HAVE A DIGITAL DATBSE

USING A COLLECTIONS MANAGEMENT SYSTEM (CMS)

Create a catalogue record in the CMS using controlled terms



File any old catalogue form in the object



THE LOCATION AND MOVEMENT CONTROL PROCEDURE

The location and movement control procedure is used to record the movement of objects both within and outside the museum, and track the locations in which objects are stored.
Location and movement control is an ongoing activity in the museum, and is carried out everytime an object is moved.

Do you need to use this procedure in your museum?

You must use this procedure in your museum if you want to:

- Find objects
- Know if objects have been lost or stolen. If you have up to date locations for all of your object you will be able to carry out location checks, and you will know if objects are missing

Setting up the location and movement control procedure

Most people set up this procedure by:

1. Agreeing a policy for location and movement control. This need only be a short written statement which describes:

- The format of your location and movement records
- Who is responsible for location and movement control
- How your catalogue location and movement control records will be kept safely.

This statement is usually communicated to all staff so that they understand the purpose of location and movement control, and know that only certain people within the museum should move objects.

2. Creating location and movement control forms and records

Three types of record are made in this procedure:

- Movement control slips or forms are usually kept on paper. They record:
    - Accession number
    - Object name
    - Old location
    - New location
    - Reason for the move
    - Name of person who made the move
    - Date

- A **proxy card** which is put in the place of the removed object. This is on paper and records:
    - Accession number
    - Object name
    - New location
    - Date removed
    - Removed by
    - Expected return

- Once a move has been made using the movement slip, a record is made of the object's new location. This is usually made in the location field in the museum's catalogue, which can be digital or on card.

You can see examples of movement slips and proxy cards in **Section 15** of this toolkit.

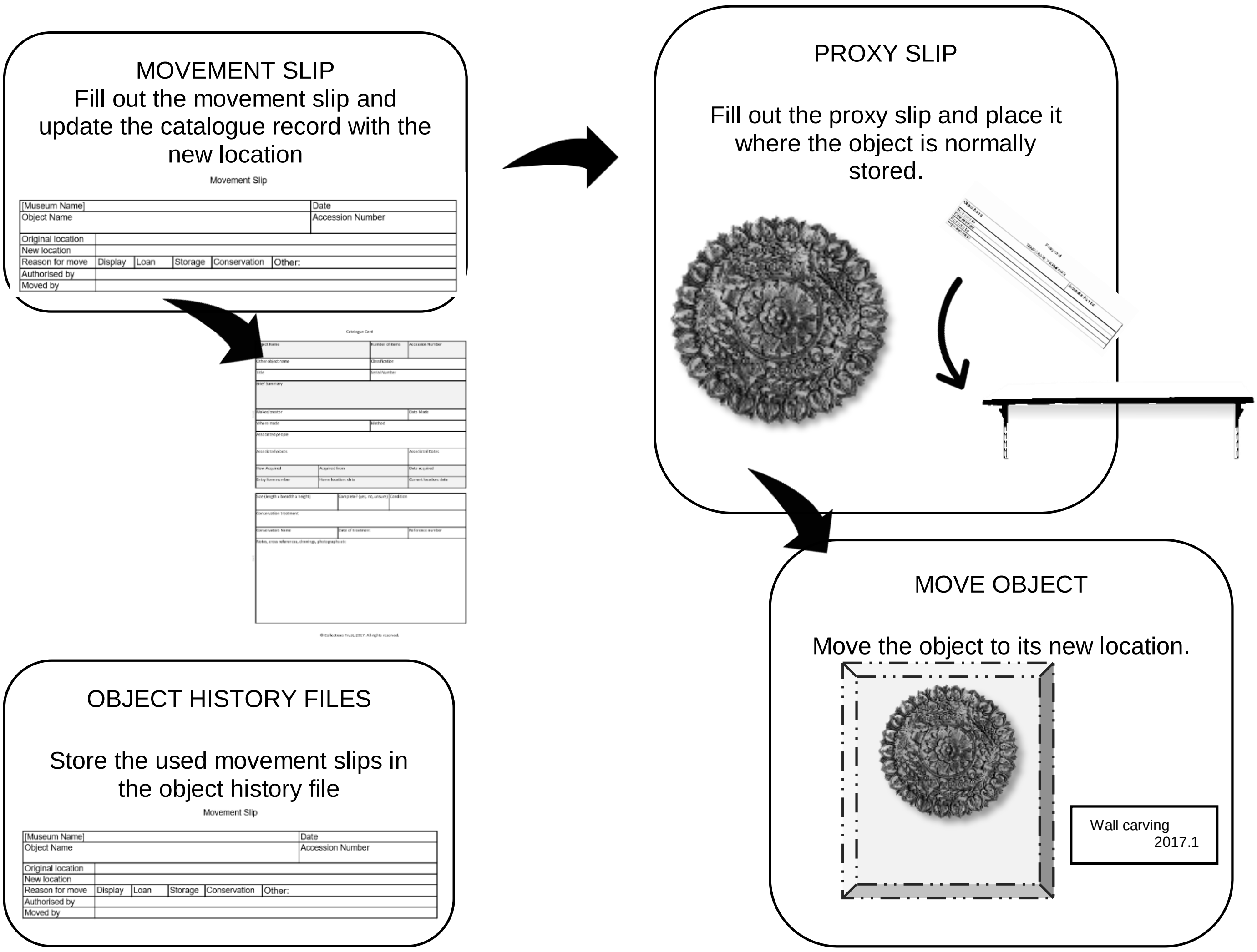
3. **Agreeing how the procedure will be carried out in your museum**. This need only be a short description of how the procedure will actually work in your museum. This description will be stored in your museum's procedural manual. The details in this statement will be very practical, including:

- Reference to the location and movement control policy
- Who is authorised to move objects in your museum
- An example of the movement control slips and proxy cards you are going to use and how to fill them in
- Where the blank slips and cards are stored
- What happens to completed slips and proxy cards

Carrying out the location and movement control procedure

When you are moving an object in your museum you will:

- Refer to your museum's location and movement control policy
- Fill out the movement slip
- Fill out a proxy slip and put in in the place of the object to be moved
- Move the object to its new location
- Amend your catalogue record with the new location(or pass it to the person responsible for cataloguing). If possible do not overwrite old locations; it is helpful to build up a picture of the various locations of the object
- Store used movement slips in the object history file



The location and movement control workflow

SECTION 7: LOANS PROCEDURES

There are two loans procedures:

- Loans in procedure, when an object is borrowed form another museum
- Loans out procedure when an object is loaned to another museum

Museums often lend and borrow objects to make their collections more accessible. Lending and borrowing can be complex procedures, and if you do lend and borrow you will need to make sure that you have the time to make sure that objects are cared for and not placed at risk.

Do you need to use this procedure in your museum?

You must use these procedures in your museum if:

- You lend objects to other museums
- You borrow objects from other museums

If your museum does not lend or borrow, you do not need to have the two procedures in place.

Setting up the loans procedures

Most people set up the Loans in and Loans out procedures by:

1. **Agreeing a policy** for lending and borrowing. This need only be a short written statement which states:

- Whether your museum lends or borrows objects. If you do not lend or borrow, then there is nothing more to say in the policy, and you need to go no further in the policy or in setting up the procedures in your museum.
- The situations where you will and will not lend or borrow objects. Generally museums do not lend to individuals
- That you will not accession borrowed objects into your collections
- That objects will only be borrowed or loaned for specific reasons and fixed time periods.
- The standards of care you will give to borrowed objects, or expect from others when you lend (such as care and security)
- Who is authorised to make decisions about lending and borrowing objects in your museum
- How your lending and borrowing records will be kept safely

This statement is usually communicated to all staff so that they feel confident about the carrying out the procedure, or know that they should not carry out the procedure. Policies are formal documents that are agreed at a high level in the museum.

2. **Creating Loans in and Loans out records.**

Loans in

Loans in can be managed using the arrival procedure. See **Section 3** of this toolkit for the procedure, and **Section 15** for an example entry form. You will not have to set up a separate loans form; you can use the object arrival form when the loans arrive at your museum. In addition to this, and before the loan arrives, you will:

- Keep any correspondence with the owners of the objects in a loans file, usually filed under the name of the exhibition.
- Create a loan in agreement which will be signed by you and the owner. This will include:
    - Date of the beginning and end of the loan
    - Venue for the loan
    - Purpose of proposed loan
    - Lender’s name and address/email, contact name and details

- Object numbers of loan; brief descriptions of loans, dimensions, historical information
- Valuations of objects; insurance arrangements
- Costs of the loan, and how they will be paid
- Condition of objects
- Display recommendations; environmental recommendations; handling recommendations
- Photographs of objects for condition checks and publicity
- Terms of reproduction of images and intellectual property rights
- Packing and transport requirements

Loans out
Loans out can be managed using the exit procedure. See **Section 8** of this toolkit and **Section 15** for an example exit form. You will not have to set up a separate loans form, you can use the **exit form** when the loans leave you museum. In addition to this, and before the loan leaves your museum, you will:

- Keep any correspondence with the borrowers of the objects in your object history file. In this file you will keep records for each loaned object, in a separate envelop stored in accession number order.
- Create a **loan out agreement** which will be signed by you and the owner. This will include:
    - Date of the beginning and end of the loan
    - Venue for the loan
    - Purpose of proposed loan
    - Lender's name and address/email, contact name and details
    - Object numbers of loan; brief descriptions of loans, dimensions, historical information
    - Valuations of objects; insurance arrangements
    - Costs of the loan, and how they will be paid
    - Condition of objects
    - Display recommendations; environmental recommendations; handling recommendations
    - Photographs of objects for condition checks and publicity
    - Terms of reproduction of images and intellectual property rights
    - Packing and transport requirements

3. Agreeing how the procedure will be carried out in your museum. This need only be a short description of how the procedure will actually work in your museum. This description will be stored in your museum's procedural manual. The details in this statement will be very practical, including:

- Reference to your loans policies
- Who is responsible for carrying out the procedures
- Examples of the forms you use (arrival; exit and agreements)
- Where blank forms are stored
- What happens to loans documentation and how it is stored

Carrying out the loans procedures

In these procedures, you will:

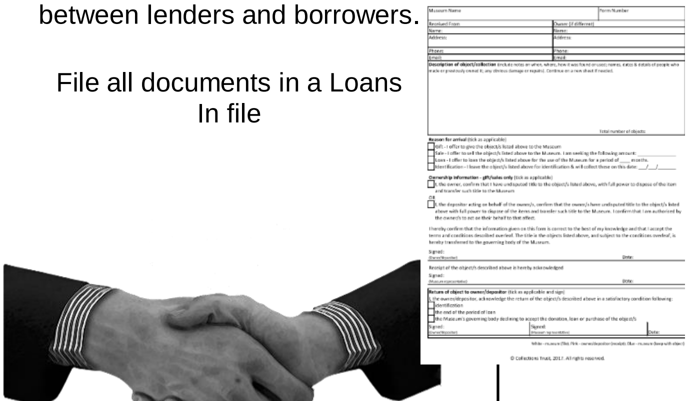
- Refer to your museum's loans policies
- Negotiate and agree loans using loans agreements, with the lenders and borrowers
- Despatch or receive the loans at the beginning of the loan period, using arrival and exit forms
- Care for borrowed objects to the standard agreed in your loan agreement
- Make sure loaned objects are cared for as agreed in the loan agreement
- Update you catalogue record for loans out, to record the loan and all locations of the object
- File all documentation
- Despatch or receive the loans at the end of the loan period
- Check the condition of objects at the beginning and end of the loan

Loans in workflow

LOAN AGREEMENT

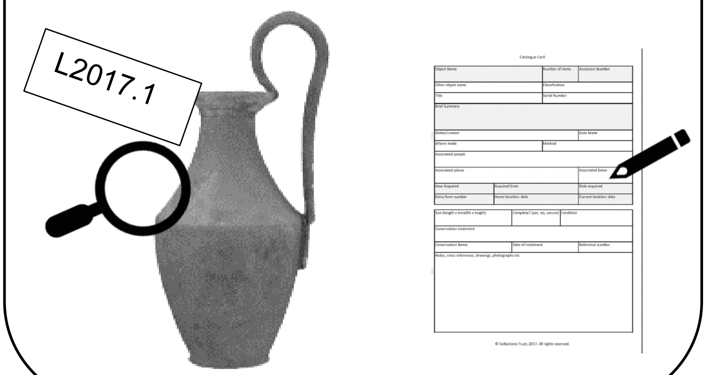
Negotiate and agree on loan conditions in a written agreement between lenders and borrowers.

File all documents in a Loans In file



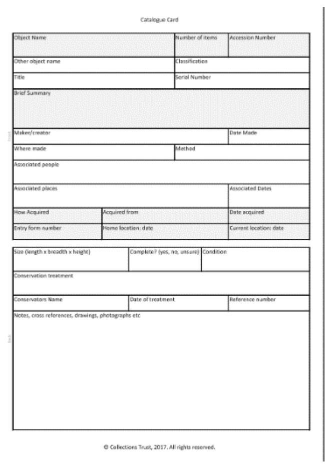
RECEIVE THE LOAN

Give each object in the loan a Loan-in number and attach to the object with a number. Check the condition of the object, photograph if necessary.



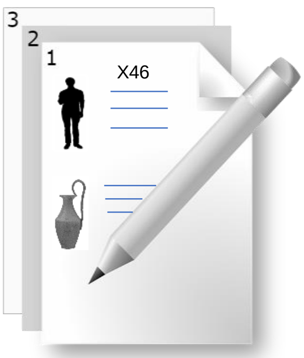
CREATE A CATALOGUE RECORD for each borrowed object, and store in loan number order.

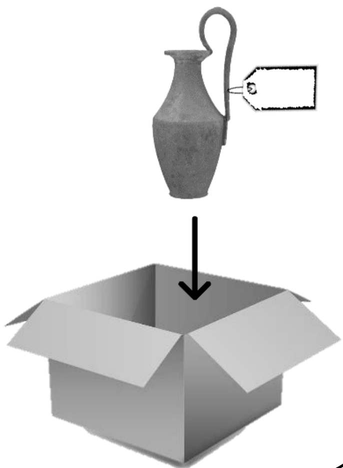
Record the loan and its location either ion a catalogue card or in a CMS. Refer to the Loan file and further information about the loan in the record. File in loan number sequence.



RETURN THE LOAN

Condition check the object. Securely pack the object as previously agreed with the lender. Return to the lender. Use Object Exit forms to record the object leaving the museum. Follow up to ensure safe arrival, and check condition.



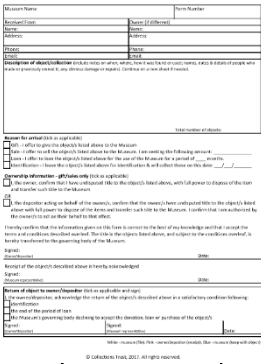


Loans out workflow

LOAN AGREEMENT

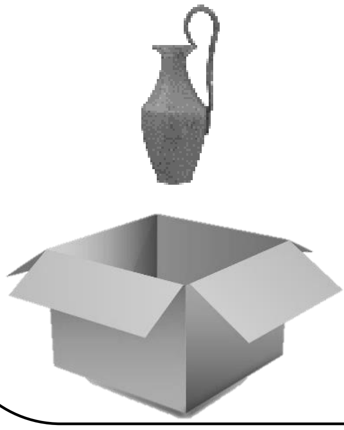
Negotiate and agree on loan conditions with the lenders and borrowers.

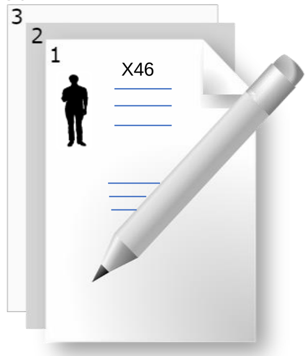
File all documents in Loans Out file

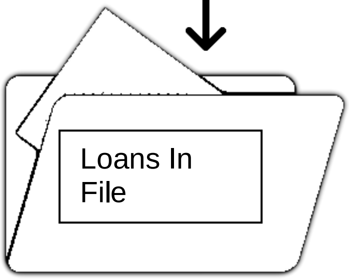


DESPATCH THE LOAN

Condition check the object, and file, photograph if necessary. Use Object Exit forms to record the outgoing object for loan. Securely pack the object with labels attached.

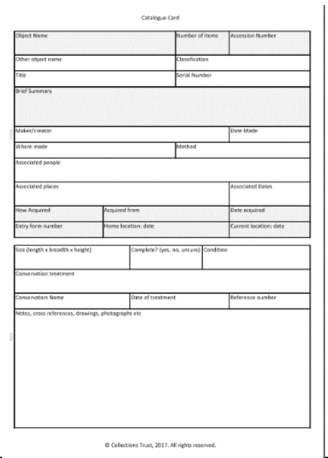






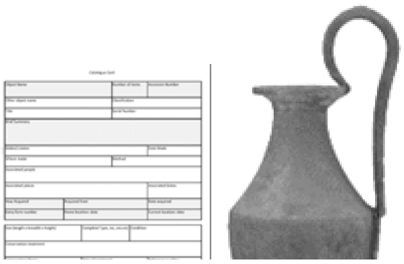
UPDATE CATALOGUE RECORD

Record the loan on the object's catalogue card (card or CMS), including the new location, and refer out to Loan Out file.



RETURN OF THE LOAN

Check the condition of the object and update all the records. Confirm receipt and condition with borrower. File all information. Update catalogue record and Loan File with all documents, including new location.



SECTION 8: OBJECT EXIT PROCEDURE

The object exit procedure is used whenever an object leaves the museum, for any reason.

Do you need to use this procedure in your museum?

You must use this procedure in your museum if:

- Objects leave your museum for any reason, either temporarily or permanently. This might be because objects are being disposed of, or going elsewhere for conservation or digitisation, or going out on loan to another museum.

Setting up the object exit procedure

Most people set up this procedure by:

1. **Agreeing a policy** for allowing objects to leave the museum. This need only be a short written statement which describes:
   - The situations where you will allow objects to leave the museum
   - Who is authorised to allow object to leave the museum and which form they will use
   - The format of your exit numbers
   - How your exit records are kept safely.

This statement is usually communicated to all staff so that they understand that there are restrictions on the circumstances under which objects leave the museum.

2. Creating an object exit form.

This form is usually on paper, in triplicate. Each form is numbered with an exit number. See **Section 15** for an example of an object exit form.

Core information is captured during this procedure. On the form you will record:

- Object exit number - this is a unique number which is written on the form and attached to the object.
- Description of the object being removed
- Name and address of the person who is to care for the object (the ‘remover’)
- Remover’s signature, carrier’s signature, museum representative signature
- Reason for removal and if a return is required
- Signatures of the museum representative and the owner
- Return signature by the museum representative (if, for example, the object belongs to your museum and has gone out for conservation)
- Any conditions, for example, the conditions under which the object will be kept

Forms are usually two sided, with conditions of the deposit written on the on reverse, each form is in triplicate:

- The top copy of the form is retained by the museum in an exit file in exit number order.
- The second copy is given to the remover
- The third copy is often used by the museum to update the catalogue record

Carrying out the exit procedure

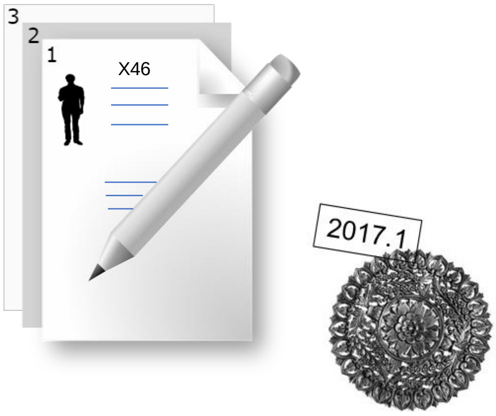
In this procedure you will:

- Refer to your museums’ exit policy
- Number the form you use to record this information and tie the number on the object
- Create the exit record by recording information about the object, the reason for the exit, the date of exit and if relevant, the new owner

- Record the proposed return date if necessary
- Capture the signature of the person who is caring for the object at its new location, and the signature of the person at your museum who is authorising the removal
- Update your museum's information (probably the catalogue record) to record the new location of the object

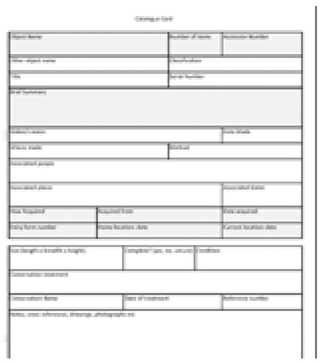
Object exit workflow

AUTHORISE THE EXIT
Condition check the object, confirm reason for exit. Pack the object. Use Object Exit form to record the object leaving the museum. Obtain signature of remover, and give remover one copy of the exit form



UPDATE CATALOGUE RECORD

Record the exit on the object's catalogue card (card or CMS). File copy of exit form in Exit File



SECTION 9: RETROSPECITVE DOCUMENTION

The retrospective documentation procedure is used to clear backlogs in museum collections. Backlogs are:

- objects without records
- records without objects

They occur because the Primary Procedures are not operating properly in a museum. If you have backlogs you will not be able to use your collection well, or develop it.

If records in your documentation system are not computerised, that is *not* a backlog. If you can link all of your Primary Procedure records and objects with attached numbers, you do not have a backlog – even if your records are all on paper.

Do you need to use this procedure in your museum?

You must use this procedure in your museum if:

- You have backlogs.

Setting up the acquisition procedure

In this procedure you will seek to re-establish accession and cataloguing information for your collections. You will not seek to re-create arrival forms.

Retrospective documentation should always be carried out in a planned way, with adequate resources. Any documentation plans created during retrospective documentation projects should be kept in the museum's procedural manual.

Most people set up the retrospective documentation project by:

1. **Agreeing which backlog you are working on.** If you have large backlogs it is a good idea to prioritise the parts of your collection that you will work on first. It might be a good idea to begin with groups of objects that are heavily used, or objects that are of high value.

2. **Agreeing how you will work on the backlog.** It is usually a good idea to work on a backlog project by:

- Making a list of all of the objects in the backlog. Your aim here is to create a temporary catalogue record for every object in the backlog. It is easy to do this with catalogue cards, you could do it on paper, you could use an excel spreadsheet, or create them in a new folder if you have a CMS. Your temporary catalogue records should include:
    - A temporary number which is also tied to the object with a label e.g. T46 is the number given to the 46th object in the backlog project. The 'T' makes sure that you know this is a temporary number.
    - A description of the object
    - The location of the object
- Once you have made temporary records for your backlog, your will try to match up objects with any records that you hold. For example, if you find a backlog object in your accession register, you can apply the old accession number to the object using a labelling and marking technique, and then create a full catalogue record.

- You may come across objects that have never been accessioned. If so, you will need to make a decision about whether your museum will accession them and add them to the permanent collections. You may not know who gave them to you, but in this case it is safer to accession them, so that you have a formal record of them.
- If you come across objects that you do not want, you may want to dispose of them. This should always be done with reference to your museum's disposal policy. Keep good records of all disposals, and never throw away old records.

SECTION 10: NUMBERING FORMATS

Most museums need to use several different numbering sequences in their documentation system. Numbers provide a code for identifying objects, and allow you to cross reference to different types of records in your documentation system.

Numbering museum objects is important because a unique number, once allocated and physically attached to the museum object, creates a link between that object and its associated information. If the link is broken, for example because the number has fallen off the object, the link between the object and its information is lost. This means that the museum no longer knows:

- What the object is
- Where it is
- How it was acquired

and will have to spend valuable time re-establishing the link between the object and information.

The numbering sequences needed and the form they take will vary slightly depending on individual museums and past practice.

The numbering sequences needed in most basic museum documentation system are:

- Arrival numbers
- Accession numbers
- Loan in numbers
- Exit numbers
- Photograph/image numbers

Numbers in documentation systems do not need to be ‘intelligent’ i.e. they do not need to convey any information about the object such as classification. They are simply codes to link the object with its information.

Arrival numbering

Arrival numbers are used in the arrival procedure; see Section 3 of this toolkit.

The arrival number provides an initial unique number for every object or group of objects entering the museum – it is the number allocated on the arrival form, and it is always attached (usually written on a label and tied) to the object when it enters the museum. It identifies objects until they are either returned to their owner or formally acquired by the museum.

If it is not possible to number every object in a group, you can give numbers to groups of objects, and record the number of objects in the group on the arrival form. Arrival numbers are allocated by taking the next number in the sequence being used by the museum; they may be pre-printed on the arrival form.

A simple running number sequence is best, usually prefixed with an ‘A’ to distinguish it from other numbering systems:
e.g. A2561; A2562; A2563; A2564; A2565....
Individual objects within a group can be identified by adding a suffix to the entry number: e.g. A2561.1; A2461.2; A2561.3; A2561.4....

Accession numbering

Accession numbers are used in the acquisition procedure; see **Section 4** in this toolkit. The accession number is the unique number allocated in the accession register and is only applied to objects formally acquired by the museum for the long term collections. Accession numbers are allocated by taking the next number in the sequence being used by the museum. They are always physically attached to, or associated with, the object using marks and/or labels.

There are two common approaches:

- A simple running number system: e.g. 14603; 14604; 14605; 14606; 14607....
- A more common system is to use the year of accession followed by a running number: e.g. 1991.3; 1991.4; 1991.5; 1991.6; 1991.7...
  If an acquisition consists of several parts, a further suffix can be added to create a unique number for each part: e.g. 1991.24.1; 1991.24.2; 1991.24.3; and 1991.24.4 represents the 24th accession in 1991, which consists of four parts.

When deciding on your museum's accession number format:

- Do not abbreviate the year to just two digits, as hopefully most museums will survive for more than a century. It can also cause confusion, for example, does '64.68' mean 1964 or 1968? Do not place the year element last as this will cause a problem for computerised sorting of records. 1991.5 is correct rather than 91.5 or 5.1991 or 5.91.
- Do not use the entry number as an accession number, as it will lead to gaps in the accession number sequence when loans and identifications are returned – every object which enters the museum is not destined to become part of the long term collections.
- Don't preface the object number with a 0. 1991.5 is correct rather than 1991.05
- Objects acquired by the museum from different sources should be given separate unique accession numbers. For example, 4 objects acquired from different sources in 1991, would be numbered: 1999.1; 1999.2; 1999.3; 1999.4

Exit numbers

Exit numbers are used in the during the exit procedure, see Section8 in this toolkit. Exit numbers are written on the exit form, and can be pre-printed.

Exit numbers can be a simple running sequence prefixed with a 'X'. and associated with the object e.g. X466; X467; X468

Loan numbers

Loan numbers are only allocated to Loans in. They are usually kept as a running sequence of numbers, prefixed with an 'L'. The number is usually attached to the object with a label or associated with the object, rather than marked.

Photograph/image numbers

Photograph numbers are the numbers given to an image, such as a print, slide, negative, or digital image, resulting from the photography of a museum object during collections management activity e.g. acquisition, conservation, exhibition or condition checking.
Photograph numbers are often dictated by the format of the photograph and the way they are stored e.g. for a digital image the photograph number is usually a file number. Catalogue records should refer to the existence of images, and their location.
Photographs taken for collections management purposes should not be confused with original images which form part of the long term collections. The latter are always numbered with accession numbers.

Temporary Numbers

Temporary numbers are used when museums are clearing backlogs. They are usually a running sequence of numbers, pre-fixed by a 'T' e.g. T46, T47, T48.

Re-numbering

Many museums have old numbering systems. When this happens re-numbering collections is often suggested, particularly when 'intelligent' accession numbers have been used which have ceased to be meaningful e.g. a classification code which is no longer in use has been included in the accession number. Re-numbering is also sometimes suggested when there are gaps in accession number sequences.

As a general rule re-numbering a collection is not worth the time and effort involved. It is better to start a new numbering system for new acquisitions and work with existing systems for objects that have already been numbered. At its most basic a numbering system should simply aim to provide a unique number for each object which links it to the information held about it. If the object can be identified and the accompanying information can be found, it doesn't matter if the numbers don't run in sequence or have different forms. Any decisions about formats will need to be recorded in your procedural manual.

SECTION 11: LABELLING AND MARKING

Objects in museums are *labelled* with arrival numbers as part of the arrival procedure (see **Section 3** of this toolkit), and the Loans in procedure (see **Section 7** of this toolkit).
Objects in the long term collections are *marked and/or labelled* with accession numbers as part of the acquisition procedure; see **Section 4** of this toolkit.

See **Section 10** for more about number formats.

Numbers are not applied to objects for security purposes e.g. in case the object is stolen. Numbers on objects are there to link the objects to the information you hold about them. If you have objects in your museum which have been given arrival or accession numbers, but you have not attached the number to the objects, you are going to lose the link between the objects and their information.

Marks or Labels?

- ‘Marks’ are written on objects using ink or paint.
- ‘Labels’ are written in on a label or a piece of tape, and tied or sewn on to the object.
- Sometimes objects are given marks *and* labels for extra security.
- If it is impossible to apply a mark or a label because the object is fragile, the number is applied to the packaging

Where to place numbers on the object

For long term collections, numbers are usually placed on the object where it is not visible to the public. They should not obscure any inscriptions or surface decorations.
It is a good to be consistent about marking objects of the same type in the same place, so that numbers are easy to find.

Labelling and Marking Techniques

Make a list of the labelling and marking techniques you use in your museum, and keep the list in your procedural manual. This table illustrates the most common techniques used for different materials:

Name of technique	**Description of technique**	**Use for**
Paraloid and ink, applied to the object	Top coat – **paraloid B72** Number applied between the two layers of paraloid using black or white drawing ink Bottom coat (i.e. touching the object)- **paraloid B67**	Objects made from non-porous materials – glass; glazed pottery;, stone basketry; clay/ bone/wood/ ivory (if surface is sound); leather (if surface is not napped or suede)
Pencil, applied to the object	Soft HB or B pencil	
Permanent ink, applied to the label or packaging	Apply number to packaging (i.e. the box, or acetate envelope) using permanent ink, either directly ono the packaging or tied on, or stuck on	Any object which is fragile, or has a porous surface, or is supported by packaging Groups of objects in packaging
Labelling techniques		
Permanent ink on a tie on label	Write on acid free label using permanent ink, attach to the object or packaging using acid free tape	bone and ivory (if surface is not sound); lacquered surfaces; plastics; shells

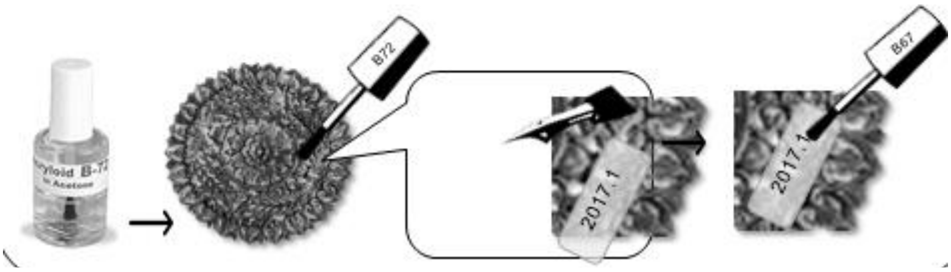
Sewn on label	Write number on acid free tape, and sew the tape to the object	Textiles, costume

If you are in any doubt about the correct technique to choose – always tie on a label.

Examples of labelling and marking techniques

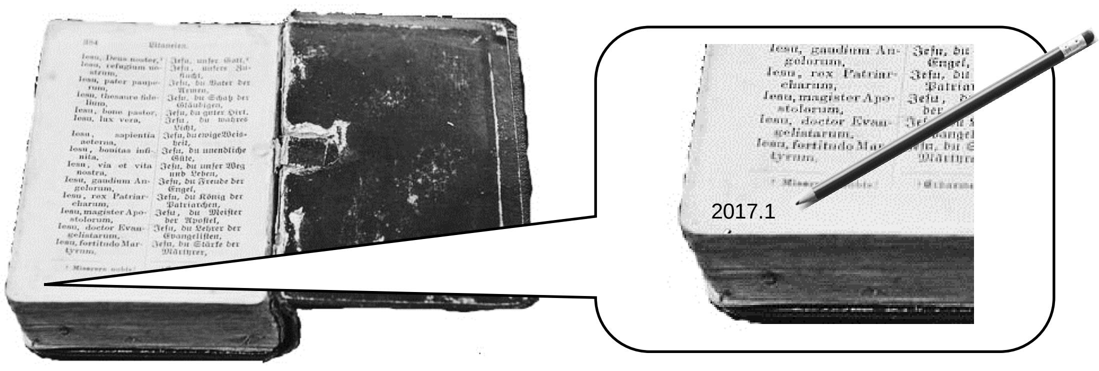
MARKING - PARALOID AND INK

Apply a thin coat of **Paraloid B67** to a discrete part of the object. Wait for it to dry and write the accession number on it in ink. Wait for the ink to dry and apply a topcoat of Paraloid B72.



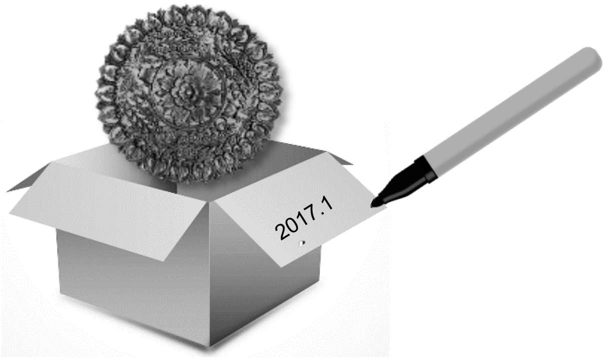
MARKING - PENCIL

Write on the object with soft HB or B pencil in a discrete area (often used for photographs and documents).



MARKING - PERMANENT INK ON THE PACKAGING OR LABEL

Apply the accession number to the packaging using permanent ink (not to the object itself).

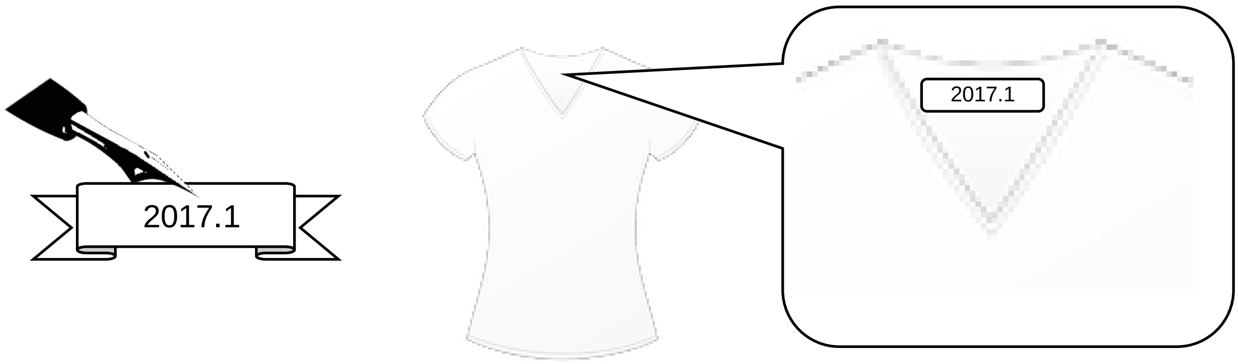


LABELLING - PERMANENT INK ON A TIE OR LABEL

Apply the accession number to an acid free label and attach it to the object.

LABELLING – SEWN ON LABEL

Write the accession number on acid free tape and sew the tape to the object.



SECTION 12: MANAGING DIGITAL ASSETS

Digital files in museums are usually referred to as 'digital assets'. They can be in a variety of formats, including images formats, audio and video. These assets are accumulated in museums as a result of:

- **Collections management activity** – e.g. when images are taken of physical objects in the collection for preservation or security.
- **Projects to encourage engagement** with the collection – e.g. when images, audio or video are taken of objects or collections so that they can be used to increase engagement with the collections through social media, or for marketing purposes.
- **Projects to increase access** to the collection – e.g. when digital images of objects are shared online to find out more about them.

These kind of digital assets need to be distinguished from 'collections digital assets', which are increasingly found in art collections, but in other types of collection as well. These are digital objects, which are collected as part of the long term collections e.g. a digital video created by an artist and acquired by the museum. These are collections objects, the museum has a long term duty of care towards them and the museum should process them through the same Primary Procedures as physical objects.

Managing digital assets

Digital assets, even though they are not part of the long term collections, are managed using many of the principles outlined in this toolkit i.e. you need to know:

- What digital assets you have in the museum
- Where your digital assets are
- Who owns your digital assets and who has the right to re-use them

In addition, it is useful to remember that digital assets can be costly to create, and if you manage them well, you will not need to re-create them because they have been lost.
All decisions about managing digital assets in your museum should be recorded in your procedural manual.

The digital assets you have in your museum
It is very easy to accumulate large numbers of digital assets. You need to have an overview of how assets are created in your museum, who is creating them and for which purposes, where they are stored and how they are numbered, named or tagged.

The location of your digital assets
For digital files which are related to individual objects in the collection, you will need to associate the digital files with the records of the physical objects. If the museum has a CMS, it will possibly have the functionality in the software to attach images to object records – if not you will need to refer to the location of the assets. For museums without a CMS, catalogue cards will need to cross refer to the location of digital files.
It is important to back up all of your digital assets in the same way that you back up the important records in your documentation system.

The ownership and right to re-use your digital assets.
The ownership of digital images and the right to re-use them is becoming an increasingly important subject for museums, as they share images, and perhaps seek to licence their re-use. In many countries the person who takes an image is the copyright owner of that image. Most museums would seek to establish a contract (usually under terms of employment) whereby members of staff will agree that images taken as part of their work are owned by the museum. This leaves the museum free to re-use the image as they wish, and impose further conditions on the its re-use.

SECTION 13: PROCEDURAL MANUALS

A documentation procedural manual is a written document, usually on paper, which explains how a museum's documentation system works. It describes the documentation system in a museum, and communicates that system to all staff and volunteers. A procedural manual saves time when new staff join the museum, it is an excellent aid for training, and it helps the organisation to be consistent about how they document their collection over the years.

As a minimum your procedural manual should explain how the Primary Procedures work in your museum. The Primary Procedures are:

- Object entry
- Acquisition
- Cataloguing
- Loans in
- Loans out
- Location and movement control
- Object exit
- Retrospective documentation

For each procedure it is helpful to include the following in your manual:

- **Your policy about the procedure** – the high level decisions you have made about the procedure. For example, for acquisition have you made decisions about the types of objects you will acquire, and how you will shape your collection over the coming years?
- **How the procedure works in your museum** – the workflow, who does what? Include any specific roles and responsibilities here.
- **The records created during the procedure and where they are kept.** This section should include decisions you have made about number formats, and how data is entered into records – do you have any conventions in your museum about terminology control for some parts of your records?
- **Back up routines for your records –** how important records are backed up. How is your accession register backed up, and if you have a CMS how is that backed up?

The procedural manual is also a good place to store information about:

- **Decisions you have made about the creation, storage and backup of digital assets** associated with your collections.
- **Number formats –** the formats for numbering objects in your museum, and any old numbering systems that you no longer use.
- **Labelling and marking techniques** that you use in your museum.
- **Locations** – details of how you describe the locations in your museum e.g. Gallery 1, Case 22; Store 6, Shelf 1, Box 7.
- **Documentation plans** that you are working on to reduce your backlogs.

SECTION 14: DEFINITIONS OF TERMS

ACCOUNTABILITY - a museum is accountable for its collection if it has records which describe:
- What is in the collection
- Where all the objects are
- How the museum obtained all of the objects in the collection

If the museum does not know any of the above it will not be accountable, and will not be able to use and share its collection effectively.

ACCESSIONING - the formal acceptance of acquisitions (whether by gift, purchase or bequest) into a museum's permanent collection. Accessioning takes place in the acquisition procedure.

ACCESSION REGISTER – a register or logbook for recording basic details concerning the source, identification and provenance of each object. It is the permanent record of all objects which are, or have been, part of a museum's permanent collections.

ACCESSION NUMBER – this is a unique number given to an object or group of objects that have been permanently accepted into the museum's collection. The *accession number* is marked on the object itself, and recorded in the accession register.

ACID FREE – a term used to describe conservation grade materials which are used to label and pack museum objects. Acid free tape, paper and boxes will not harm museum objects.

ACQUISTION PROCEDURE – the term used to describe the acquisition of an object by the museum. Accessioning (the formal addition of an object to the permanent collections) takes place during the acquisition procedure.

AGGREGATOR – in a museum context this term is used to refer to online platofrms which are drawing data dfrom individual museum databses and merging the content so that it can be searched by online audiences.

AUDIENCE OR USERS – a term used to describe the people who use museum collections, rather than just visit the museum. . Users might use a collection via the internet, and never actually visit the museum.

BACKLOGS – objects and records which cannot be linked are called 'backlogs'. Backlogs occur when the Primary Procedures have not been impelemted properly. The Retrospective documentation procedure is used to clear backlogs and re-link objects and information.

BACK-UP ACCESSION REGISTER – a copy of the accession register, which is usually made by photocopying, and kept off site.

CATALOGUING – the term used to describe the collecting of rich contextual data about an object. Cataloguing takes place in the cataloguing procedure, usually after acquisition.

CLASSIFICATIONS - terms, which describe aspects of the object and are recorfded in the documentaion system. They help you to search for objects under terms such as 'material', or 'subject'.

COLLECTIONS MANAGEMENT SYSTEM (CMS) - a digital database for managing collection information, often supplied commercially. In its simplest form a CMS holds catalogue records, but it will rarely accommodate documents like letters from donors, or arrival forms, or loan agreements which usually continue to be kept on paper.

CONTROLLED VOCABULARY OR CONTROLLED TRMINOLOGY – agreed terms for entering some forms of data into records. Museums usually control terms such as object name, or dates.

CORE INFORMATION - museums always try to capture and store 'core information' about their collections as a minimum. Core information is:

- Object number
- Object name
- Object description
- Object location
- How the object was acquired
- Who it was acquired from
- Date acquired

Core information is captured if the Primary Procedures are correctly implemented. More complex information can be added to this at any time.

DATA - the information that is collected about objects when the procedures are carried out and the records are made. *Data* can be held digitally or on paper and is captured in named 'fields'.

DIGITAL ASSETS – digital content or information created by the museum when they manage, promote or provide access to the collections. .

DIGITAL COLLECTION ASSETS – digital museum objects which are part of the permanent collections, for example an art work that was created in a digital format. These objects are sometimes referred to as 'born digital'.

DIGITISATION – the term used ot describe the act of turning physical information into digital information.

DOCUMENTATION BACKLOGS – backlogs are records which can't be linked to objects, and objects which can't be lined to records. They occur when the Primary Procedures are not working properly in a museum.

DOCUEMTATION PROCEDURAL MANUAL – a manual which describes how a museum carries out its Primary Procedures and the information they collect, so that all staff understand how the procedures work.

DOCUMENTATION SYSTEM - all the recorded information a museum holds about the objects in its care both on paper and digitally e.g. loan agreements, registers, arrival forms, letters from donors, conservation records.

FIELDS - a section of a record on card or digital in which a single piece of information is stored.

LEGAL TITLE OR OWNERSHIP – the legal right to ownership of an object or collection.

LOCATION – the physical position of the object at any one time i.e. where it is in the storeroom, which area it is on display, where it is if it has been loaned.

LONG TERM COLLECTIONS OR PERMANENT COLLECTIONS - the groups of objects that have been given or bought by your museum, and then accessioned. Objects in the long-term collections will have a significance which means that your museum has a long-term duty of care towards the object. They will be given an accession number and added to your accession register.

MISSION STATEMENT - A short written statement of the purpose of an organisation. The mission statement guides the actions of an organisation, provides a sense of direction, and guides decision-making. A museum mission statement might contain reference to the museum's commitment to the development, care and provision of access to the collection.

MOVEMENT CONTROL FORMS OR SLIPS – forms to record and track the movement of objects from one location to another

OBJECT ARRIVAL FORM - is used to record details about the arrival of an object at the museum.

OBJECT ARRIVAL NUMBER - is assigned to an object when it arrives at the museum, e.g. A46 represents the 46th object to arrive at the museum. Some of these objects that arrive at the museum will be returned to their owners, and some might join the long-term collections. The format of the object arrival number is different to the format of the accession number or object exit number, so that they cannot be confused.

OBJECT EXIT NUMBER - a number given to an object when it leaves the museum, e.g. X46 represents the 46th object to leave the museum. The format of the exit number is different to the object arrival number and the accession number so that they cannot be confused.

OBJECT HISTORY FILE – a permanent file, usually a filing cabinet, which holds records about objects such as letters from donors or receipts if the object was purchased. Object history files are usually stored in accession number order.

LABELLING AND MARKING WITH OBJECT NUMBERS – the activity where a museum attaches an object number to an object, to link the object to its records. Numbers are usually attached in the arrival and acquisition procedures. Numbers are attached using different techniques depending on the procedure, and on the material and size of the object.

PARALOID – a chemical used to write accession numbers on objects. Paraloid provides a protective surface on top of the object. the accession number is written in ink on top of the paraloid.

PRIMARY PROCEDURES – the 8 procedures in a documentation system which make sure that the museum is accountable for all of the objects in its care. The Primary Procedures are:

- Object arrival
- Acquisition
- Cataloguing
- Location and movement control
- Loans in
- Loans out
- Object exit
- Retrospective documentation

POLICY or **POLICY STATEMENT -** statements made by your museum about how the museum will behave in certain situations. Policies are shaped at a management level in the museum, they are always written down, understood by all staff, and they are often shared with the public. For example, most museums have acquisition policies which describe how they acquire objects.

PROCEDURES - an agreed way, usually written down, by which a museum carries out its activities. It includes all collections management activities such as condition checking; acquiring objects; lending objects and moving objects. The term describes everything that you do when you are carrying out collections management tasks.

PROVENANCE - the full history and ownership of an item from the time before it was acquired by the museum to the present day.

PROXY CARDS – a card displaying some core information about an object which is placed in the usual location of the object as a reference when it is moved during the Location and movement control procedure. .

RECORDS – documents that are created when collections management procedures are carried out, i.e. catalogue records, or loan records. Records might be on paper or they might be digital. For most museums, many records in the system will be on paper.

RETROSPECITVE DOCUMENTION – the procedure where a museum clears backlogs, and re-links objects and records.

SIGNIFICANCE – the values and meanings that objects and collections have for people and communities. Significance may also be defined as the historic, artistic, scientific and social or spiritual values that items and collections have for past, present and future generations. These are the criteria or key values that help to express how and why an object or collection is significant.

SUSTAINABILITY – when used in a museum context this term is used to describe a way of managing the collection and delivering services which is for the long term.

TERMINOLOGY CONTROL - the standardisation of the terms used when cataloguing museum objects. If terms used to describe museum objects are standardised when information is entered into a documentation system, it will be easier to retrieve information about those objects through a search.

TRANSFER OF TITLE FORM – the form used to formally assign ownership from the donor to the museum.

UNITS OF INFORMATION - the term used to describe the pieces of information which are recorded about museum objects e.g object name, location, material. These pieces of information are recorded in fields in records.

WORKFLOW - the term used to describe the activity that takes place during collections management procedures. Workflows describe what actually happens during a procedure.

SECTION 15: EXAMPLES OF FORMS

This section contains:

- Object arrival form
- Accession register pages
- Catalogue card
- Movement slip
- Proxy card
- Object exit form

Catalogue Card

Front

<table>
<tr><td colspan="2">Object Name</td><td>Number of items</td><td>Accession Number</td></tr>
<tr><td colspan="2">Other object name</td><td colspan="2">Classification</td></tr>
<tr><td colspan="2">Title</td><td colspan="2">Serial Number</td></tr>
<tr><td colspan="4">Brief Summary</td></tr>
<tr><td colspan="3">Maker/creator</td><td>Date Made</td></tr>
<tr><td colspan="2">Where made</td><td colspan="2">Method</td></tr>
<tr><td colspan="4">Associated people</td></tr>
<tr><td colspan="3">Associated places</td><td>Associated Dates</td></tr>
<tr><td>How Acquired</td><td colspan="2">Acquired from</td><td>Date acquired</td></tr>
<tr><td>Entry form number</td><td colspan="2">Home location: date</td><td>Current location: date</td></tr>
</table>

Back

<table>
<tr><td>Size (length x breadth x height)</td><td>Complete? (yes, no, unsure)</td><td colspan="2">Condition</td></tr>
<tr><td colspan="4">Conservation treatment</td></tr>
<tr><td>Conservators Name</td><td colspan="2">Date of treatment</td><td>Reference number</td></tr>
<tr><td colspan="4">Notes, cross references, drawings, photographs etc</td></tr>
</table>

Proxy card

TEMPORARILY REMOVED

Object Name		Accession Number
Removed to		
Date removed		
Removed by		
Expected return		

TEMPORARILY REMOVED

Object Name		Accession Number
Removed to		
Date removed		
Removed by		
Expected return		

TEMPORARILY REMOVED

Object Name		Accession Number
Removed to		
Date removed		
Removed by		
Expected return		

TEMPORARILY REMOVED

Object Name		Accession Number
Removed to		
Date removed		
Removed by		
Expected return		

TEMPORARILY REMOVED

Object Name		Accession Number
Removed to		
Date removed		
Removed by		
Expected return		

TEMPORARILY REMOVED

Object Name		Accession Number
Removed to		
Date removed		
Removed by		
Expected return		

Movement Slip

[Museum Name]					Date
Object Name					Accession Number
Original location					
New location					
Reason for move	Display	Loan	Storage	Conservation	Other:
Authorised by					
Moved by					

[Museum Name]					Date
Object Name					Accession Number
Original location					
New location					
Reason for move	Display	Loan	Storage	Conservation	Other:
Authorised by					
Moved by					

[Museum Name]					Date
Object Name					Accession Number
Original location					
New location					
Reason for move	Display	Loan	Storage	Conservation	Other:
Authorised by					
Moved by					

[Museum Name]					Date
Object Name					Accession Number
Original location					
New location					
Reason for move	Display	Loan	Storage	Conservation	Other:
Authorised by					
Moved by					

[Museum Name]					Date
Object Name					Accession Number
Original location					
New location					
Reason for move	Display	Loan	Storage	Conservation	Other:
Authorised by					
Moved by					

[Museum Name]					Date
Object Name					Accession Number
Original location					
New location					
Reason for move	Display	Loan	Storage	Conservation	Other:
Authorised by					
Moved by					

Object Arrival Form

Museum Name		Form Number
Received From	Owner (if different)	
Name:	Name:	
Address:	Address:	
Phone:	Phone:	
Email:	Email:	

Description of object/collection. Continue on a new sheet if needed.

Total number of objects:

Reason for arrival (tick as applicable)

- [ ] Gift - I offer to give the object/s listed above to the Museum
- [ ] Sale - I offer to sell the object/s listed above to the Museum. I am seeking the following amount: ________________
- [ ] Loan - I offer to loan the object/s listed above for the use of the Museum for a period of ____ months.
- [ ] Identification - I leave the object/s listed above for identification & will collect these on this date: ___/___/_______

Ownership information - gift/sales only (tick as applicable)

- [ ] I, the owner, confirm that I have undisputed title to the object/s listed above, with full power to dispose of the item and transfer such title to the Museum

OR

- [ ] I, the depositor acting on behalf of the owner/s, confirm that the owner/s have undisputed title to the object/s listed above with full power to dispose of the items and transfer such title to the Museum. I confirm that I am authorised by the owner/s to act on their behalf to that affect.

I hereby confirm that the information given on this form is correct to the best of my knowledge and that I accept the terms and conditions described overleaf. The title in the objects listed above, and subject to the conditions overleaf, is hereby transferred to the governing body of the Museum.

Signed:
(Owner/depositor) Date:

Receipt of the object/s described above is hereby acknowledged

Signed:
(Museum representative) Date:

Return of object to owner/depositor (tick as applicable and sign)

I, the owner/depositor, acknowledge the return of the object/s described above in a satisfactory condition following:

- [ ] identification
- [ ] the end of the period of loan
- [ ] the Museum's governing body declining to accept the donation, loan or purchase of the object/s

Signed: (Owner/depositor)	Signed: (Museum representative)	Date:

Conditions of Deposit

We suggest that on the reverse of the object arrival form, your museum makes some simple statements about your museum's policy about taking objects into your museum under the object arrival procedure.

This text should be headed 'Conditions of Deposit' and include general statements about:
The care you will take of the object while it is at your museum
The fact that your museum will not give valuations

For Enquiries describe:
The fact that you do not accept responsibility for any opinions you give about the object
How long the museum will keep the object, and what you will do if the object is not collected

For Acquisitions describe:
That your museum has an acquisition policy, and you will only acquire objects within that policy.
That if you decide to accept the object(s) offered, the museum understands that the owner wants to transfer ownership of the object to the museum

For Loans describe:
That you museum has a loans policy, and that all loans are subject to a separate loans agreement.

EXIT FORM - FRONT		
Museum Name		Form Number
Remover	phone number and email	
Address:		
Recipient	Phone number number and email	
Address:		
Exit number of each object, and description. Continue on seperate sheet if necessary Total number of objects:		
Reason for exit		
Return required? Date of return		
Museum: I agree that the inforationonthis form is correct: signature and date		
Remover: I acknowledge receitp of this object: date and signature		
Recipieint: I acknowledge receipt of this object: signature and date		
notes		
Return of of objects:museum: I acknowledge return of he obejcts listed above: signature and date		

EXIT FORM - BACK

Conditions of Deposit

We suggest that on the reverse of the exit form, your museum makes some simple statements about your museum's policy for allowing objects to leave the museum. This text should be headed 'Conditions' and include a statement regarding the terms and conditions that the remover is agreeing to:

- how they will take care of the obejct
- return the obejct if necessary by an agreed date

And make a statemetn about what happends to the different parts of the form:

- the top copy should be reatined by the museum. It informs the ammendment of the catalogue record and is filed in the object history file
- the second copy goes with the remover and is given to the recipient
- the third copy can be filed inan object exit file.

th