

APPENDIX 8 - PASTPERFECT REVIEW & ASSESSMENT SPREADSHEET

Item #1	Item for Cleanup	Qty.	Priority	Assessment Determination	Priority Notes	Cleanup Instruction
1	Object Name	4 sets of 2	High	This data set is at a manageable-level for cleanup of the overlapping Object Names. In order to improve findability and maintain good data hygiene, it's recommended that these terms are reviewed and consolidated.	These cleanup activities will improve search result quality and an "easy" win regarding data cleanup effort. With both of those in mind, this is a high priority item.	Review Object Names that are similar and consider consolidating them into one. There are a few actions to consider. At a minimum for the PP Online data, it is determined that "Exhibit Material" can be disposed of. 1. Decide on a DCHS policy regarding the assignment of PP "Collection" names. Are they all DCHS? Are they identified by "creator" or "donor" names? What are the criteria for selecting and assigning a collection name? And, depending on the answer, is there another PP field where DCHS can capture either DCHS or the creator/donor collection name—as an example? 2. Review the Collection entries to determine if any need to be revised. 3. Additionally, commit to policy a statement on what is not considered a collection item and therefore does not go into the collection database. 4. For items such as "exhibit materials" consider "deaccessioning" or otherwise removing those items from the PP database in order to limit confusion regarding collection materials.
2	Collection	16	Low	Exhibit Materials: There are 16 entries listed as "Exhibit Materials". DCHS suspects that these materials are, in fact, exhibit materials such as signs and other non-original object materials. This supposition is based on the known practices of early DCHS staff who used PP to help track non-original object items; such as furniture, supplies, and exhibit materials. Is this an accurate Collection identification to use? Was it meant to represent a loan, or items from the DCHS collection used for an exhibit? The answer may help us determine if and how we should approach this data.	While the accuracy of this data is important, it can be considered a low priority .	Identify and prioritize chunks of data for cleanup. Specifics on how to break out this type of data cleanup into achievable chunks will be covered in the next section: A Plan for PastPerfect Online Data Cleanup. 1. Prioritize cleanup of the Description field for the 559 Online records. 2. Consider a policy for using a collection name or credit line.
3	Description	559 (to review)	High	Descriptions (by the very nature of the field) are the largest data set to review and revise. Improvement in this field can also be the most rewarding because it yields increased user engagement and can add to staff time-savings in reference and product (exhibition, research, etc.) output.	This area of cleanup will take the longest time as it requires reviewing, editing, and creating narratives. But, it's also one of the most important areas of the record as it describes what's depicted in each photograph. This is considered a high priority , but one that should be approach in achievable batches.	
4	Identifier	559	Low	An absent Accession Number may not hinder discoverability but it could impact collection management especially in situations where staff memory or institutional knowledge is no longer available. The missing Accession Numbers can also hinder data migration as it's often the data that helps tie related records (such as Conservation or Exhibition Loans) together.	If and when DCHS intends to participate in a collaborative portal this will become a higher priority. Until then, this is a low priority .	Check the PP 5 data to verify the correct accession numbers and add it.

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5	Publisher	559	Low	While there's no immediate impact, this piece of data will be required for any future collaborative portal opportunity.	If neither Collection nor Home Location feel like a good fit for the repository name, consider using a customizable field in PP to capture the data. If and when DCHS intends to participate in a collaborative portal this will become a higher priority. Until then, this is a low priority .	PP 5 doesn't have a specific field carved out for capturing a repository name. In the DCHS data the Collection field is sometimes used to indicate the "Deschutes County Historical Society"; however, it's also used for capturing more granular collection names for collections at DCHS. The repository name can also be captured as part of the Home Location field in PP 5, but it will share space with more specific location information—information that may not be desirable for public consumption.
6	Title	559	High	Titles serve to increase discoverability of materials and their use. Titles are one of the first (and sometimes only) fields a user reads before they make an adjudication on the item's usefulness to their search and move on.	Given the immediate attention a title can command when reviewing items in search results, this is recommended as a high priority area to focus on.	<p>It can be intimidating for some to create a title for an item. To help steer past any roadblocks consider the following prompts:</p> <ul style="list-style-type: none"> •What's the most important thing about this photograph? •Who or what is the focus of the photograph? •What event is being captured in the photograph? <p>Examples:</p> <ul style="list-style-type: none"> •The Exterior of Pilot Butte Inn Featuring the Patio •Mrs. Jane Smith with Juniper Elementary School 1st Graders •A Harvesting Scene with Farm Equipment, Grain, and Horses <p>The creator is most often a controlled vocabulary, can be local, an authority, or both. In the case where a creator is not known, DCHS has elected to confirm this with the use of "Unknown" in the Creator field.</p> <p>Examples:</p> <ul style="list-style-type: none"> •Unknown •Smith, Jane •The Bend Bulletin <p>Remember: Use the "People" classification in PP to establish the correct names of Creators so that they can be searched for and applied consistently.</p>
7	Creator	559	Medium	Capturing creator names help provide contextual information to both collection workers and collection users. Using the Creator field provides a tie across collection items that share a creator and can offer insight into the inter-relationship of the collection.	This is a helpful field but not quite as critical as Date or Subject. It's a medium priority field.	

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8	Date	559	High	Date is one of the top fields we (and our audiences) use to help limit materials we're searching for and intend to work with. With that in mind, any date provided, even an estimation based on contextual information, can be incredibly helpful.	It's recommended that when using an approximation, pair it with a year range. Not all systems are able to recognize "circa 1910" as an acceptable record for search results when someone wants an item created between 1905 and 1920. Given the potential helpfulness this data lends to item discoverability, this is a high priority area to focus on.	The creation date of the object. Many of the descriptions capture a date or era and can be used to populate the Date field. In PP there are two date capture fields: ●Date: free text can capture circa, month names, etc. ●Year Range: YYYY-YYYY Examples to Use in Date: ●August 15, 2010 ●August 2010 ●2010 ●Summer 1964 ●circa 1990s Examples to Use in Year Range: ●1890-1910 (if spanning multiple items; e.g. an archival
9	Format	559	Low	While format is an important field to understanding the item being viewed, it's doesn't immediately impact management or use of the item.	This is a lower priority item and one to reconsider if and when DCHS wishes to participate in a collaborative portal—as facet searching based on format is a commonly used tool by our audiences.	For Archives and Photograph collections, this is where we would typically expect to see what is currently in Object Name; such as "Print, Photographic". DCHS may also elect to use the Materials vocabulary. Dimensions can also be included as part of the Format for data entry. However, in PP there is a separate Dimensions field to use.
10	Language	559	Low	For heavily visual collections this is a "would be nice" requirement. It doesn't immediately impact discovery or use in a significant way and can wait until other high priority data areas have been addressed.	This is a low priority area.	When applicable: This field is most used in the Archives collection module; however, it can increase accessibility when used to indicate if there is written language present within the image.
11	Subject	559	High	Subject and Search Terms are incredibly powerful tools to aid in item discover and use. If there are no subjects or inconsistent subjects in a CMS then it makes the items harder to be find—relying heavily on Title (if it exists) and Description fields. No or inconsistent Subject or Search Term use also hinder the ability to browse the collection as there's no thru-line in the material tied together by subject matter.	This is a high priority field that can yield immediate benefits to the discovery and use of the collection.	Subjects are used as search tools to indicate thematic relationships and meaning among items. There doesn't appear to be any Subject field use in the 559 PP Online records. In this case, it's suggested that DCHS refer to Nomenclature and utilize the People, Subjects, and Classification search terms to improve findability.

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12	Rights	559	Medium	<p>This statement is a proactive risk mitigation tool to gently educate audiences that there are different rights to using collection content. The inclusion of this statement is of particular importance if the collections are to be published, discoverable, and shared online. It makes it clear who the photograph belongs, if it's covered under copyright or Creative Commons license, or can be used with the stated credit line. While the impact of this statement isn't immediate nor does it impact discoverability, it is an important piece of data to include for all collection items online.</p>	<p>Select a copyright, Creative Commons, or other statement approved by DCHS and apply it to all applicable items in the collection. This is a medium priority for collection items that are available online.</p>	<p>This field indicates to the external audience what rights are tied to this item and whether or not the item is eligible for use and what type of use. It also indicates to the user that there should be an appropriate citation if the item is used. This field can be found in the Notes, Legal, and Provenance sub-screen. The Web Rights field will most likely be the most common field to use; however, legal can also be used if there are other legal or rights considerations beyond a DCHS copyright.</p>
13	Relation	559	Medium	<p>Taking the time to indicate relationships among items is an investment that can have tremendous benefit. While Creator or Subjects can assist by inferring a relationship, the use of the Relation field can help indicate relationships among items that aren't as obvious as Creator or Subject. Using this field can save future time searching for future exhibits and research.</p>	<p>Brainstorm how relationships may span the collection and which items should indicate the other. This field is a medium priority.</p>	<p>Given that several of these records refer to other related items, it makes sense to use this field to indicate relationships. The Relation field can also be used to capture a relationship to items at a different heritage organization. Note: There's not necessarily going to be a relationship to record for every item, so this field is indicated as required when applicable.</p>
14	File Name	559	Low	<p>This field may not have immediate impact, but it will if the data and related digital files ever needs to move to a different CMS platform, or be contributed to a collaborative portal. Knowing which record each digital file belongs to—and the actual file name as it exists outside of PP—can be critical to maintaining the pair.</p>	<p>It's not an immediate priority, but it is incredibly important as cataloging continues. Start capturing the file name for attached digital files moving forward. As time allows, retroactively populate the file names in a custom field that you can call upon later when you need it. This is a low priority for cleanup.</p>	<p>In reviewing the data from PP 5 there does appear to be use of the IMAGEFILE field. A comparison of the PP 5 records with the 559 PP Online records may help with completing any data gaps for this field.</p>