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ILS 655 Unit 3/4-Digital Library Technology Review

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In the lecture notes in Unit 5, elements of a desirable user interface were discussed in terms of feasibility, integration, usability, consistency, reliability, security and recoverability. *PastPerfect* software is a commercially-available software package used by over 2,750 libraries, museums, and historical societies to manage their digital library collections. Usability is the element most evident when working with this software. In their training sessions, the practical day-to-day workflow is acknowledged by beginning with “A man comes into your library with a box.” Anyone who has worked in a library, museum, or historical society knows this scenario. From intake to dissemination, the designers of the software seem to know the daily routines of data entry personnel, librarians assigning metadata, historians writing narratives, and harried directors who have little time to compose thank you letters and track gifts and loans. Much care has been taken to manage the people side of the business of preservation. Tracking fund-raising, patrons, donors, and volunteers is also a feature of the software.

#### PastPerfect Software Contact Information

*PastPerfect* is the flagship of the Pastime Software Company, Inc. located at 300 N. 300 N. Pottstown Pike, Suite 200, Exton, PA 19341. Their business telephone number is 610.363.7844 and the Sales Department can be emailed at sales@museumsoftware.com. The company was founded in 1998 and remains a small company of about eleven employees in their single location. The main contact person is Vice-President Brian Gomez. Their internet address is <http://www.museumsoftware.com/> and their toll-free telephone number is 1-800-562-6080. Version 4 has just been released and the pricing is \$795 for a single user license but members of AASLH (American Association for School and Local History) receive a 20% discount. Network upgrades are

available for 2-5 computers at \$450, 6-10 computers at \$800, 11-25 users at \$1,100 and for 26+ computers it costs \$1,400. The company maintains a client list and map on their website under the Resources tab with links to online projects.

Upon a cursory walk-through of the software screen, it would seem that the product is designed for museums. The detail in the Objects Module is extensive and the Contacts activities with pledge collection abilities underscore its utility in that realm of work. However, the Library, Photo, and Archive modules are just as deep in detail and supportive of activities you would expect in collecting many types of materials aside from re-alia. The software is aesthetically appealing. Even the data-entry screens don't seem like work. Pull-down menus, use of authority files, and links to the *Library of Congress Thesaurus for Graphical Materials-Subject Terms* and the *Getty Union List of Artist Names and Art and Architecture Thesaurus* websites aid in data-entry. Authority files are customizable for local definitions to help speed up data entry processes.

After evaluating objects for inclusion into the collection, the Accession module allows the user to temporary take custody of the item, describe the item(s) and print a receipt for the donor. If the item is kept for the collection, accession activities are managed in this module: assigning it an accession number and completing a Deed of Gift and Thank You letter.

#### The Basic Four Modules

The cataloging of an item begins in the Objects, Library, Archive and Photos modules. The Objects catalog is chosen from the main menu. There are different screen views for Archaeology, Art, Geology, History and Natural History. Each type of object will bring up a specialized screen. For example, the natural history screen presents taxo-

conomic choices but in the case of art objects, provenance fields are presented. Chenhall-approved names of objects are accessed through a Lexicon as an authority file. Site information can be described here for archaeological, geological, and paleontological sites and sensitive site information can be password-protected. Repatriation processes are included in this module for noting items that are subject to review, investigation, and disposition. Appraisals are recorded here as well as the condition of the item. Authority files are used to speed data entry for people, classification, subjects (using the *Library of Congress Thesaurus for Graphical Materials*), and search terms. Dublin Core metadata is generated here and the AAT online button accesses the Getty Museum's *Art and Architecture Thesaurus* (Library of Congress, 2007) (Getty Museum, 2007).

The Photos Catalog has specialized fields for describing photographs that includes details of the size, negative number, and film size of the photo. Again, the Authority files aid in data entry. Classification is based on a photograph classification system, a finding aid, developed by the Bishop Museum in Honolulu and is organized in a hierarchical system. There is event detail to add for the photographer, the studio, the medium, and storage location fields (Bishop Museum, 2007).

The Archives Catalog is the area where unpublished materials are catalogued. Examples of materials are manuscripts, oral histories, videotapes, personal papers, maps, music collections, and other documents. Items may be catalogued singly or in collection sets. In this module, conditions of access are defined that restrict or affect access of the item for its use, reproduction, or publication. Finding aids that relate to the item may be identified along with how to obtain a copy. Materials that are associated are described, such as copies or other related materials in the repository. There is multi-level linking to

help organize series of documents with a parent directory. Music collections are described in this module with specific fields for track number, composer, artists and their associated instruments, song title, and composer. The genre, a scope and content abstract note, recording label, and recording media may also be defined. Oral histories are cataloged here with notes for applicable restrictions, narrator and interviewer information, transcriptionist, and donor release forms. Links may be made to the audio files for playback while viewing the record but it requires the additional Multimedia Upgrade.

The Library Catalog is designed for a non-circulating library and describes newspapers, pamphlets, books, and periodicals. Some specialized fields include information found in the CIP (Cataloging in Publication) but cutting and pasting from WorldCat for older titles, or original cataloging is allowable. The Dublin Core and Library of Congress website buttons are available in this module as well (Parr, Hilton, & Danner, 2004).

#### Add-On Modules

To amplify features of the software and to more easily disseminate the collection, add-on modules are available. The Multimedia Module (\$370) allows users to attach, view, print images, and link multimedia documents to records. These documents can be digital audio or visual, web page, *Microsoft Word*, *Excel* and pdf files. *PastPerfect* also will allow the user to acquire images through most digital cameras and scanner directly into the software. The Virtual Exhibit add-on module is \$375.00 and produces HTML webpages from selected records or the entire website with search capability. It can then be hosted on the user's server or a hosting service is available. The hosting service, *PastPerfect Online*, has a \$248 set-up fee and charges \$410 for annual hosting. An additional 10,000 online records sell for \$236. MWeb software supports the online collection and

features advanced search capabilities and Click-and-Search, an alphabetic browsing feature. Strategic Planning is the company that has developed MWeb, a proprietary software they would not share information about, but they provide a list of examples of websites using their search software (MWeb, 2007). Barcode printing is available in a module selling for \$79 that includes the most common barcode formats, Code 128 and Code 39. It also supports Codabar, Interleaved 2/5, UPC (both EAN and JAN), and UPC A and E. The EZ-MARC module is \$95 and allows the import and export of MARC data to library catalogs. Scatter-Gather is an essential add-on for situations where a user is working off-site so that the data can be merged with the parent site. This would be useful for field work and for working at home (Pastime Software, 2007).

#### Technical Requirements

The data-entry station requirements are unremarkable using a 600 MHz Pentium 3 or equivalent CPU with a Windows 98, ME, NT, 2000, XP operating system of 128 MB RAM. Forty megabytes of storage space is needed for the program and 5 MB is needed for every 1,000 records. The local area network (LAN) can be Windows NT, Novell, or the Network Neighborhood that comes with the Windows operating system. The software is a simple self-installation.

#### Technical Standards

Metadata can be added using the Dublin Core standard and it can be exported to XML for viewing and sharing. To describe man-made objects, the software uses Chenhall's Revised Nomenclature, a museum standard that is a hierarchical classification system published by the American Association of State and Local History (AASLH) (Canadian Heritage Information Network, 2007b). The software uses the *Library of Congress*

*Thesaurus for Graphical Materials for Subjects*, a thesaurus of over 6,300 terms for indexing visual materials (Library of Congress, 2007). To describe photographs, a thesaurus from the Bishop Museum of Honolulu, based on their experience with over one million photographs, is used to assign content (Bishop Museum, 2007). There are over 100 pre-inserted authority files to help with data-entry for author, classification, collection, content, creator, material medium, object name, people, photographer, places, print size, storage location, and subject fields. Authority files are also user-defined as data is entered into the records, such as the Contacts file. Many of these files are pull-down menus for easy data entry. MARC data can be imported and exported to aid in data entry and dissemination.

The Archives are compatible with International Council on Archives ISAD(G) standards. Relational, hierarchical, network, and object oriented data structures are featured. Underlying the database management software is *Microsoft Visual FoxPro SQL* handles the query language. The character sets are Extended ASCII and image formats supported are TIFF, JPEG, and BMP. Data can be imported from ASCII-comma delimited, tab delimited, DBase, Excel, FoxPro. Data can be exported to ASCII-comma delimited, tab delimited, DBase, Excel, FoxPro, Excel/HTML, XML, Dublin Core XML, Microtext, MARC21 (with the add-on module mentioned earlier)(Museum Documentation Association, 2007). The maximum number of concurrent users of the system is not set by the software, with 78 recorded from the largest installed system. The largest record can have 255 maximum fields and the largest installed system has 200,000 records but is, again, not limited by the software. Recommendations for data backup are outlined in the software documentation and a button on the Main Menu accesses the options available.

### Functionalities

In addition to the functions of each main module, data for *PastPerfect* can be converted from *Access*, *Argus*, *ASCII*, *dBase*, *DIF*, *Excel*, *Filemaker Pro*, *Foxpro*, *MARC*, *MCMS*, *Mimsy*, *Minaret*, *Paradox*, *Q&A*, *Snap for DOS*, and *Snap for Windows*. Each catalog record has an update history including the date, time, and the user who last made changes in the record. Records can be noted for approval of a supervisor. User-defined function keys can cut down the time used to input today's date, name of the institution or collection, or any other data phrase that is used regularly. In acquisition management, registering an item develops and maintains an immediate brief and permanent means of identifying an object. It also establishes the right of ownership. All associations with a person, place, and event are preserved. A numbering system assures that each item has a unique identification number to track that item through all the processes of the software. Temporary custody status of an item can be converted easily to a permanently owned item, a loan, or an item to be returned to the owner. All of these end results triggers a donor letter to the owner reflecting the status of the item. Up to four donors can be linked to a single item. De-accessions are tracked as well. People biographies may be established to ascertain the relationships of donors, the subjects of photographs, or the creator of documents. Catalog records can be associated with that person's biography.

The interface is clean with links clearly marked for the various functions of the software and the four main modules. The data entry screens are surprisingly neat considering how much information is organized in each screen and the amount of resources and links used to help catalog the item. Navigation is clear and consistent from screen to screen, module to module. Exits are clearly marked and warning messages are appropri-

ately given for permanent changes to items, such as watermarking a photograph. Searching is called “Research” and is accomplished by choosing all catalogs, keyword, lexicon, people, and search term as parameters. Boolean logic is used to search through the catalogs, one by one or collectively, and by keyword. The keyword search includes a “sounds like” parameter.

The Reports function includes over 200 built-in customizable reports and also includes a *Report Maker* utility for designing your own reports. Print previews are available. There is also a place to store any custom reports that the user may have commissioned from the software developer.

Indispensable for public library, museums, and historical associations is the Contact and Campaigns functions of *PastPerfect*. The Contact database tracks members, donors, pledges, memberships, volunteer hours, planned giving, giving history, and contact information. A contact’s email address is linked to the computer’s email program for quick messages. The Campaigns function tracks the goals, membership, and pledges of fund-raising programs, complete with a thermometer to indicate progress. Initial pledge and reminder letters are found here as is an *Excel* spreadsheet for managing campaign expenditures. From these areas, contacts can be assigned to an array of lists for specific letters and for printing mailing labels.

A small feature, but one that points to the developer’s understanding of how people work, is the small icon for the “To Do” found in the main modules and on the Main Menu. Many workers work in environments fraught with interruptions. The sticky note function allows workers to communicate among themselves or to leave notes for themselves. In the four main modules, the sticky note has a pull-down menu to flag that record

for special treatment, such as items that need to be checked by a supervisor or to have dates verified.

### Technical Support

There is a free thirty-day support period after purchase but PastTime Software, Inc. also offers a first-year support option for \$299 for a single license and \$372 for network users. Customization of the software and for reports is arranged by one percent of the clients. Custom forms and reports cost \$50 an hour for development and the typical job runs from \$50 to \$250. Data conversion rates are also \$50 an hour with the typical conversion costing \$400 to \$800. Training modules are available for \$119 per module for management training, membership, reports and the Report Maker, and Virtual Exhibit with a per diem of \$300 per day plus expenses. The user guide is a free online download and the bound volume is \$20. It is well-written with useful screen shots and helpful discussion on the practical aspects of setting up systems and how to save time in data-entry. The manual narrative is a clear explanation in layman terms about classification systems, lexicons and what they do, search functions, and various other terms and processes that volunteers may not have encountered before working in a cataloging environment. There is a newsletter that is produced six times a year and also a discussion forum is online for users' to contribute tips and ask questions. Free upgrades are posted monthly. Versions are offered for no charge but the newest major upgrade to Version 4.0 was \$300. The telephone and email response is excellent in content and timeliness (Canadian Heritage Information Network, 2007a).

### Observation and Comments

After training for two days and working with the evaluative copy of the software for a few weeks, the software gets high marks for its integration, usability, and consistency. The screens are all organized to make sense and are kept consistent from module to module. Great care has been taken to reduce the data-entry time that is instrumental in keeping volunteers and data-entry workers from becoming fatigued. It is easy to learn and remember. Recoverability is an issue to be considered (McCray & Gallagher, 2001).

With the data export functions featured in this software, the raw data can be exported to other management systems if the company falls apart and there is no more support of the product. Since the data is structured to professional standards, the issue of proprietary restrictions of the item descriptions is addressed. In terms of the security of the data, users are assigned various layers of security by the supervisor so as to protect sensitive data (pledges and personal contact information, for example) and to keep a volunteer in an area for which they have been trained.

*PastPerfect* is a package that would get an institution up and running with an aesthetically-pleasing interface and solid user services for retrieval of data with a minimum investment of time and expense. The cost of the software in terms of the range of functionality and ease of operation is a value. Larger institutions who have their own technical staff could adapt the HTML code to customize the interface and add some user services to the online presence. Provisions for purchasing a copy of original photographs might be one service to add. Examples of online collections powered by *MWeb* and *PastPerfect* are found at <http://pastperfect-online.com> to illustrate that the standard look

and feel can be branded to look unique. The Amelia Island Museum (<http://ameliaisland.pastperfect-online.com/30803cgi/mweb.exe?request=advform>) is a nice example of how the search engine works.

Although there are few reviews in the library literature about this product, an unscientific study in our region shows that most of the libraries, museums, and historical societies in this part of Oregon are writing grants to secure funds or outright purchasing *PastPerfect* software to manage their collections. Given the extensive range of types of mediums and materials that are addressed in the development of this product, the software can adapt to tasks of institutions small and large, with experienced cataloging staff or not. With a well-planned workflow and timeline, this product would enable a library to produce a digital library with a minimum of training and frustration. The results of the cataloging and description of the items produces data that brings resources to the end user in an efficient and pleasing manner.

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