



Help Guide for PastPerfect Users Converting to *Nomenclature 3.0*

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Covered Topics

- Glossary of terms
- Converting to *Nomenclature 3.0* through PastPerfect 5
 - What to Expect
 - Missing Object Names
- Cataloging Natural History, Archaeological, and Ethnographic Collections
- Managing Nomenclature in Museums with Small, Specific Collections
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Glossary of Terms

Nomenclature: Controlled and structured system of terms used within a particular discipline

Lexicon: Word book for the language of a specific science or discipline

Local Term: Regional or ethnic terms used to name an object; may or may not be included in standardized nomenclature

Categories: *Nomenclature 3.0* assigns objects to 10 categories based on function

Category 1: Built Environment Artifacts

Category 2: Furnishings

Category 3: Personal Artifacts

Category 4: Tools & Equipment (T&E) for Materials

Category 5: T&E for Science & Technology

Category 6: T&E for Communication

Category 7: Distribution & Transportation Artifacts

Category 8: Communication Artifacts

Category 9: Recreational Artifacts

Category 10: Unclassifiable Artifacts

Classifications: Grouping of objects based on function within a category

Sub-classifications: Specific grouping of related objects

Primary Object Term: The most general object name assigned to an artifact,

Example: [Jewelry](#)

Secondary Object Term: Term used to describe specific examples of a primary object name, *Example:* [Pendant](#) (describes a specific example of the primary object name [Jewelry](#))

Tertiary Object Term: Very narrow and specific, often singular, object descriptor, *Example:* [Pendant](#), [Charm](#), used to describe a type of pendant (a secondary object name used to describe jewelry, a primary object name)

General Example of Hierarchy Format

Category 8: Communications Artifact

Classification: Personal Symbols

Sub-classification: Belief Symbols

Primary Object Name: Symbol, Political

Secondary Object Name: Button, Political

Tertiary Object Name: Button, Campaign

(The function of an object becomes very specific as we move from the broad category into the specific object names)

Other Name: Data entry field within PastPerfect that can be used for local terms or other object names not found in *Nomenclature 3.0*

Unclassified Object Name: Object name that has not been organized under the structure of *Nomenclature 3.0*

Preferred Term: New term in *Nomenclature 3.0* that is replacing an older, previously valid term. Example: [Rule, Line](#), has been replaced by the term [Gauge, Line](#)

Converting to *Nomenclature 3.0* through the PastPerfect 5 Upgrade

What to expect during data conversion

When converting to *Nomenclature 3.0* using PastPerfect 5, there are a few things to anticipate:

- No data will be lost; select to continue using the previously configured nomenclature and lexicon from PastPerfect 4 at any time
- If the Revised Nomenclature (called 2.0 in PastPerfect) was used in an accurate and consistent manner, the data conversion will be relatively simple and straightforward
- *Nomenclature 3.0* includes additional categories and object names (primary, secondary, and tertiary) not in Revised Nomenclature. PastPerfect will automatically place object names from Revised Nomenclature into the new hierarchy of *Nomenclature 3.0*
- There will be some new organization of old terms; most of these terms will update automatically but changes may be noted when performing a hierarchical search
- Some terms from Revised Nomenclature will now be “Illegal Object Names” and will have an associated new preferred object name. These object names along with their preferred terms will appear in the lexicon in the “Lexicon Illegal Terms List” after selecting “View Non-Preferred Terms.”
- Certain previously accurate terms will now be listed as unclassified. These are terms that do not exist in *Nomenclature 3.0*

Missing object names explained

Certain object names will not be found in *Nomenclature 3.0*. This may include terms in Revised Nomenclature. Examples include purposeful spelling changes, such as adding a hyphen [Machine](#), [Can-Capping](#), instances where there is an added modifier [Uniform \[Part\]](#), or object names that were deleted from *Nomenclature 3.0* because they were too specific. These terms will not disappear from your lexicon, but if you convert to *Nomenclature 3.0* they will be listed as unclassified and they will need to be updated to new approved terms or reclassified.

While data may now be in a new place or need to be re-classified, no data has been lost in the conversion process and you can continue using the previously configured lexicon by selecting option 2.0 under the Lexicon Field in System Parameters.

The screenshot shows the 'Setup System Wide Parameters' dialog box with the following sections:

- Country Settings:** Country: USA, Date Style: American, View button.
- Accession & Sites Screens:** Maximum # of Catalog Records to Display for One Accession or Site: 999. Note: To increase speed, Accessions or Sites with a very large number of associated catalog records will not display the list of catalog records.
- Object ID Sort by:** Alpha (radio), Numeric (radio), Object ID Separator: .
- Catalog Record Date Display:** Catalog Record Date Format: YYYY/MM/DD (checkbox).
- Catalog Research - Query:** Save query in query history file even if there were no matching records found. (checkbox checked).
- Lexicon Nomenclature:** Use Nomenclature Version: 3.0 (dropdown menu, circled in red).
- Web Links:**
 - Art & Architecture Thesaurus (AAT) Website: http://www.getty.edu/research/conducting_research/vocabularies/aat/
 - Union List of Artist Names (ULAN) Website: http://www.getty.edu/research/conducting_research/vocabularies/ulan/
 - Library of Congress Online Catalog Website: <http://catalog.loc.gov/>

Buttons at the bottom: Unlock Upgrade Options, Exit.

Selecting Nomenclature Version in “Setup System Wide Parameters”

Cataloging Natural History, Archaeological, and Ethnographic Collections

Nomenclature was developed for the museum field in order to identify and classify man-made objects where a specific function is known. It is not intended to provide specific object names for every type of collection, individual artifact, or specimen. However, it is flexible and institutions should make alterations to the lexicon as needed in a consistent and thoughtful manner. The Nomenclature Committee also recommends that you work with other organizations with similar collections in order to adopt standards that may be used and potentially incorporated into later versions of Museum Nomenclature.

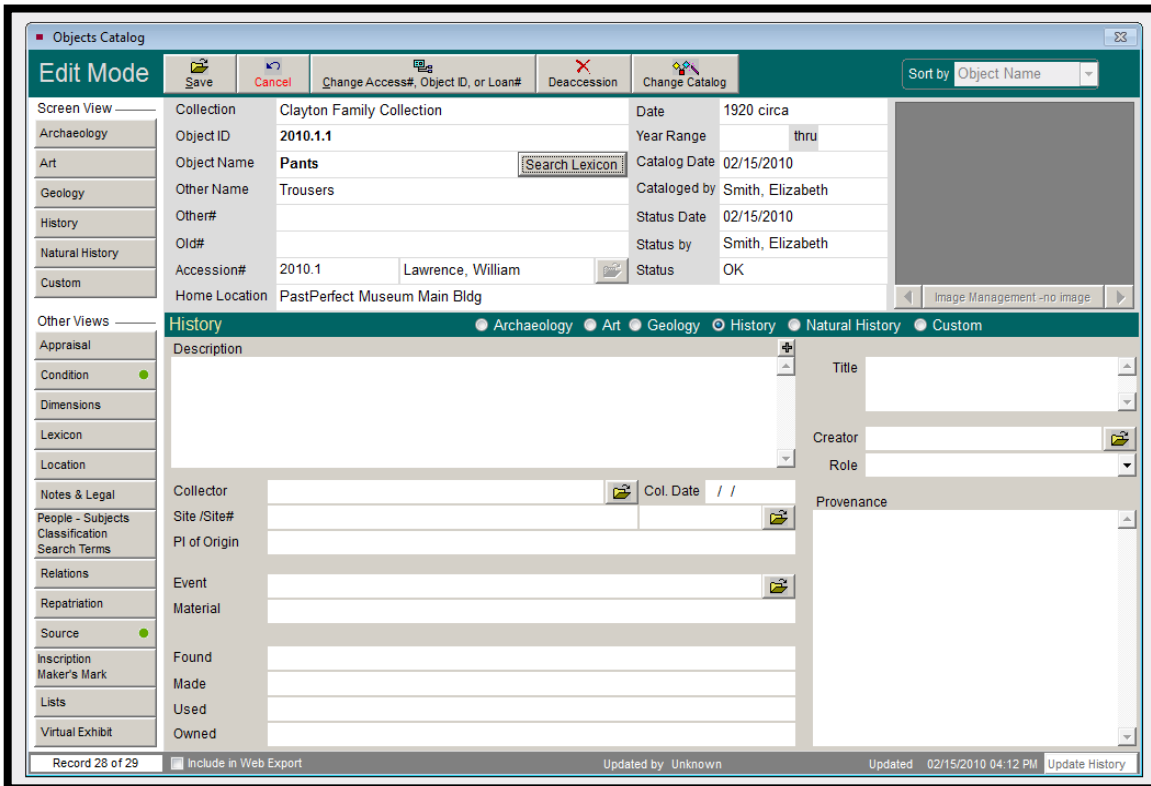
Nomenclature 3.0 includes basic object names for working with natural history, archaeological, and ethnographic collections. However, other scientific authorities have already established conventions for identifying these types of materials. Catalog these artifacts using non-scientific, non-specific terms, or consider using other scientific lexicons such as the Integrated Taxonomical Information System. For more information visit: www.itis.gov.

When the function of an object can be determined, it may be appropriate to assign a contemporary object name that describes function and then add a more historically accurate object name to the other name field.

Managing Nomenclature in Museums with Small, Specific Collections

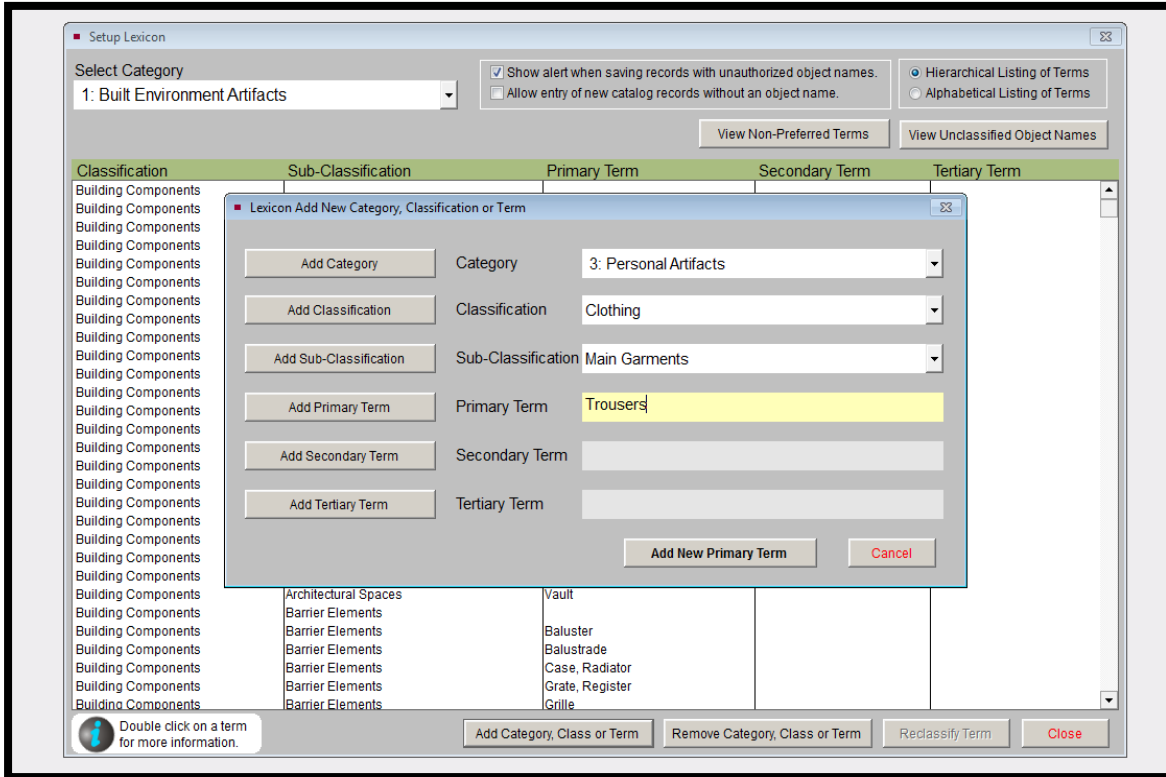
There are many museums with very specific collecting missions. Examples include toy museums, military history museums, and art museums. These museums often use very specific object names not found in *Nomenclature 3.0* because standardized Museum Nomenclature does not fit their organizational needs. If you work in this type of museum there are ways to utilize *Nomenclature 3.0* along with preferred, more specific object names.

One example is a military history museum where objects are assigned names specific to the United States Military rather than standardized Museum Nomenclature. This can be very useful for specialists performing research but is inadequate for the general population including museum staff or volunteers lacking a military specific background. An example of this is the military term “Trousers.” *Nomenclature 3.0* does not use the term “Trousers” but does use the object name **Pants**. In this instance, use the object name **Pants** and include the term Trousers in the Other Name or Title fields.



Object Name “Pants” from Lexicon, with “Trousers” as Other Name

When a term exists in *Nomenclature 3.0* that can be used to adequately name an object, that term is the primary object name. If an appropriate object name does not exist, add a more specific object name to the lexicon and classify it under the categories found in *Nomenclature 3.0*. You can also add object names to the secondary or tertiary object name field.



Adding specific object name to lexicon

Secondary and Tertiary Object Names (PP5 evaluation copy example)

Catalogers should regularly utilize the other name, title, and key word search fields to include other object names that may be more specific to an artifact or type of collection. The overall goal should be a structured and consistent method of naming objects that will allow for searches by a diverse population.

Institutions may also choose to not include in the lexicon terms that fall outside the scope of the collection. Only using the subject specific object names needed by a museum may be less intimidating than trying to utilize all of *Nomenclature 3.0* and may help reduce errors of data entry. Classifications, categories, and object names can be deleted within the PastPerfect lexicon. However, if the scope of the collection were to expand, correcting the lexicon to include the additional *Nomenclature 3.0* terms will be a very daunting task.

Finally, if the lexicon in PastPerfect 4 is heavily altered and you need to keep it, but also want to incorporate *Nomenclature 3.0*, do not convert to *Nomenclature 3.0* when you upgrade to PastPerfect 5. When converting to *Nomenclature 3.0*, the entire lexicon will convert to the new format. To continue using the PastPerfect 4 lexicon, consider adding any new terms and categories to the pre-existing lexicon. This will allow you to maintain the lexicon but also start to adopt *Nomenclature 3.0*. If you work on converting the lexicon so that it conforms to the standards of *Nomenclature 3.0*, when you eventually convert and begin using the *Nomenclature 3.0* lexicon, you will have less unclassified terms and the process may be a bit easier.

Notes for Users of PastPerfect 4

During the data gathering process for this help guide, it became apparent that many institutions are avoiding upgrading to PastPerfect 5 because of the loss of the Scatter/Gather feature. As *Nomenclature 3.0* is not available in PastPerfect 4, upgrading is encouraged because it includes the option to use the *Nomenclature 3.0* lexicon in a digital format.

There are options that allow cataloging off-site without Scatter/Gather. These include using a remote desktop connection. This is a feature integrated into Windows OS. Or consider setting up a Virtual Private Network (VPN).

For more information about these options, please contact your PastPerfect representative and / or your IT department. You may also find more information about remote desktop at windows.microsoft.com

Data Entry Standards and Examples for *Nomenclature 3.0*

Institutions dedicated to using the Revised Nomenclature correctly and avoided heavy use of local terms, will face minimal problems when cleaning up the converted *Nomenclature 3.0* lexicon. However, if many local terms were used as primary object names or catalogers were prone to errors of data entry, the task of cleaning up the lexicon will be more complex.

Following are examples of some of the common types of situations being encountered throughout the conversion and lexicon clean up, as well as instructions for potential solutions. Throughout this process, keep in mind that *Nomenclature 3.0* is a tool to be used by museum professionals. It is intended to help in the naming of objects, not make cataloging more difficult or time consuming. *Nomenclature 3.0* is flexible and is intended to be adaptable to meet an institutions unique needs and circumstances.

Examples

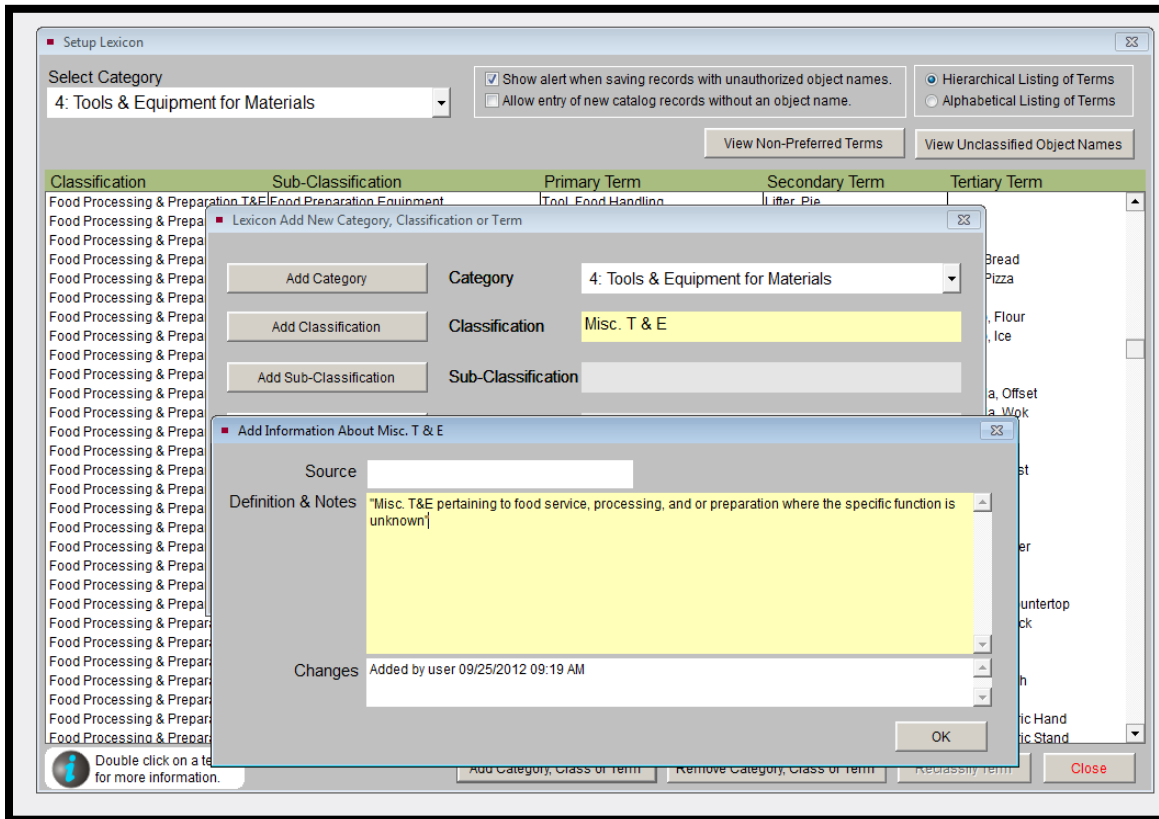
1. *What happened to the more generic terms from Revised Nomenclature?*

Example: [Spoon](#) found in Food Service T&E (Tools & Equipment) in Revised Nomenclature

Nomenclature 3.0 does not use these generic terms but now relies on the cataloger to know the specific function of a spoon for object naming. Following are three examples of data clean-up solutions:

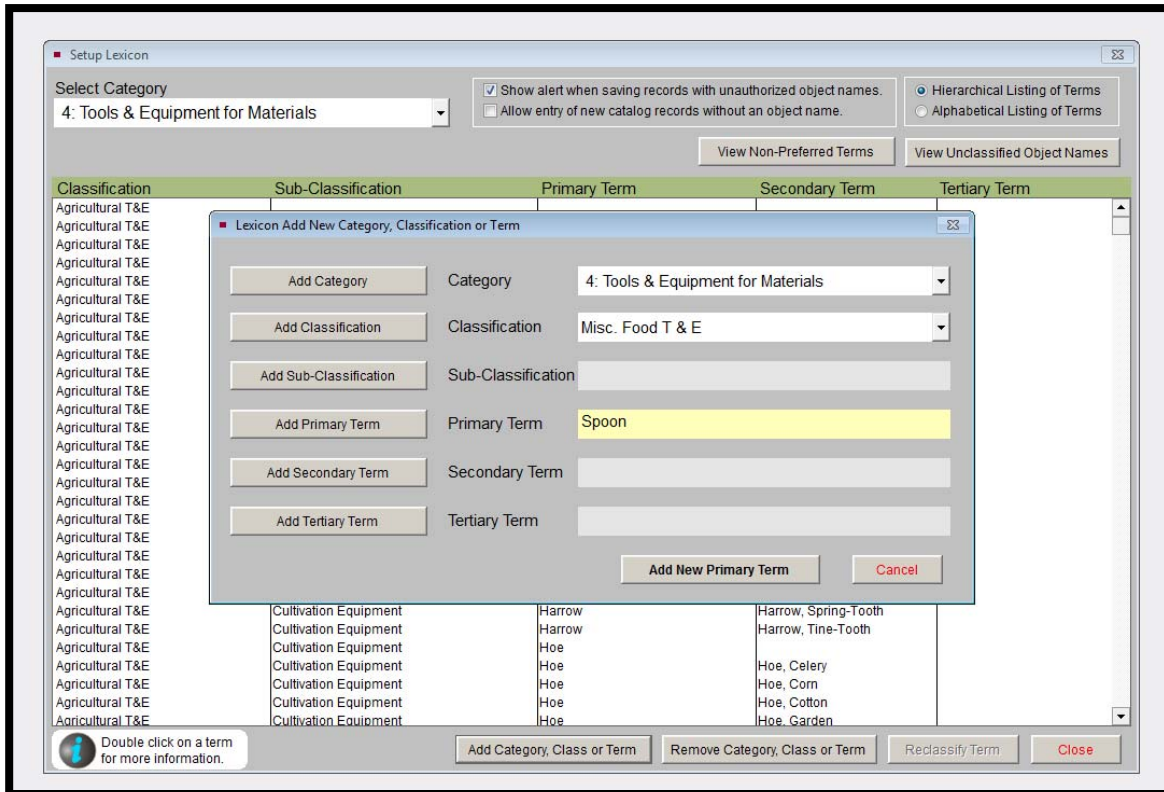
1. Go through the object records one by one and update them assigning the appropriate function based object name, ex. [Spoon, Sugar](#); [Spoon, Measuring](#); or [Spoon, Medical](#)
2. Add a generic classification and object name to the lexicon
 - In the lexicon select to add new category

- Select add new classification under T&E for Materials
- Add the new classification “Misc. Food T&E”
- Accept and in the description enter something similar to “Misc. T&E pertaining to food service, processing, and or preparation where the specific function is unknown”



Adding new classification and description

3. Once this classification is added to the lexicon, you need to add the primary term **Spoon** under this new classification
 - Go back into add category, classification or term
 - Select to add new primary term and type **Spoon**
 - Select T&E for Materials as the category and Misc. Food T&E for the classification and accept



Adding “Spoon” as Primary Term before adding Description

- Under description type something similar to “Spoon pertaining to food service, processing and or preparation where the specific function is unknown or unspecified.”

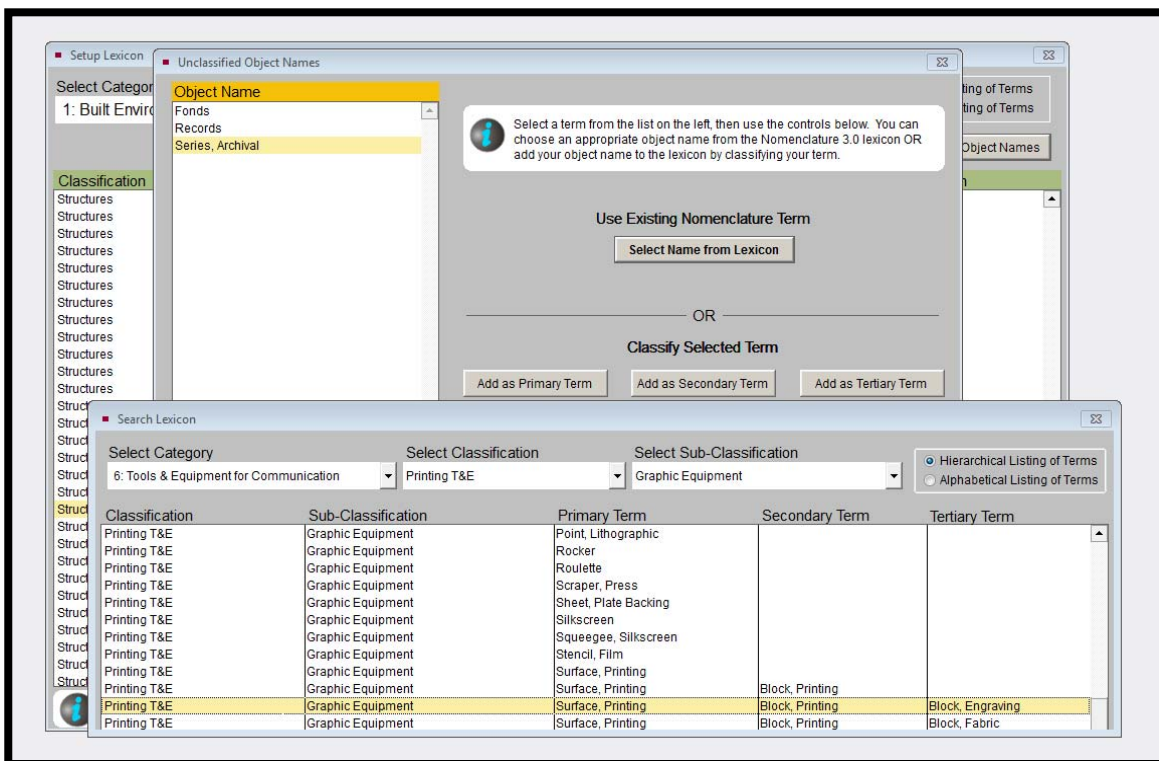
All records assigned the object name [Spoon](#) are now classified as shown and no further action is needed

2. How to manage terms used in Revised Nomenclature that were updated in Nomenclature 3.0 and have also switched categories

Example: [Plate, Engraving](#) in Printing T&E should now be called [Block, Engraving](#) in Graphic Equipment under T&E for Communication

The term [Plate, Engraving](#) will initially be listed in your unclassified objects list within the PastPerfect lexicon tab and you must change the object names.

- In the lexicon tab, double click the term [Plate, Engraving](#), click change to a new name, and then select the new term [Block, Engraving](#) from the lexicon. Select to change all to update all records
- You can continue to use [Plate, Engraving](#) under other name if you choose

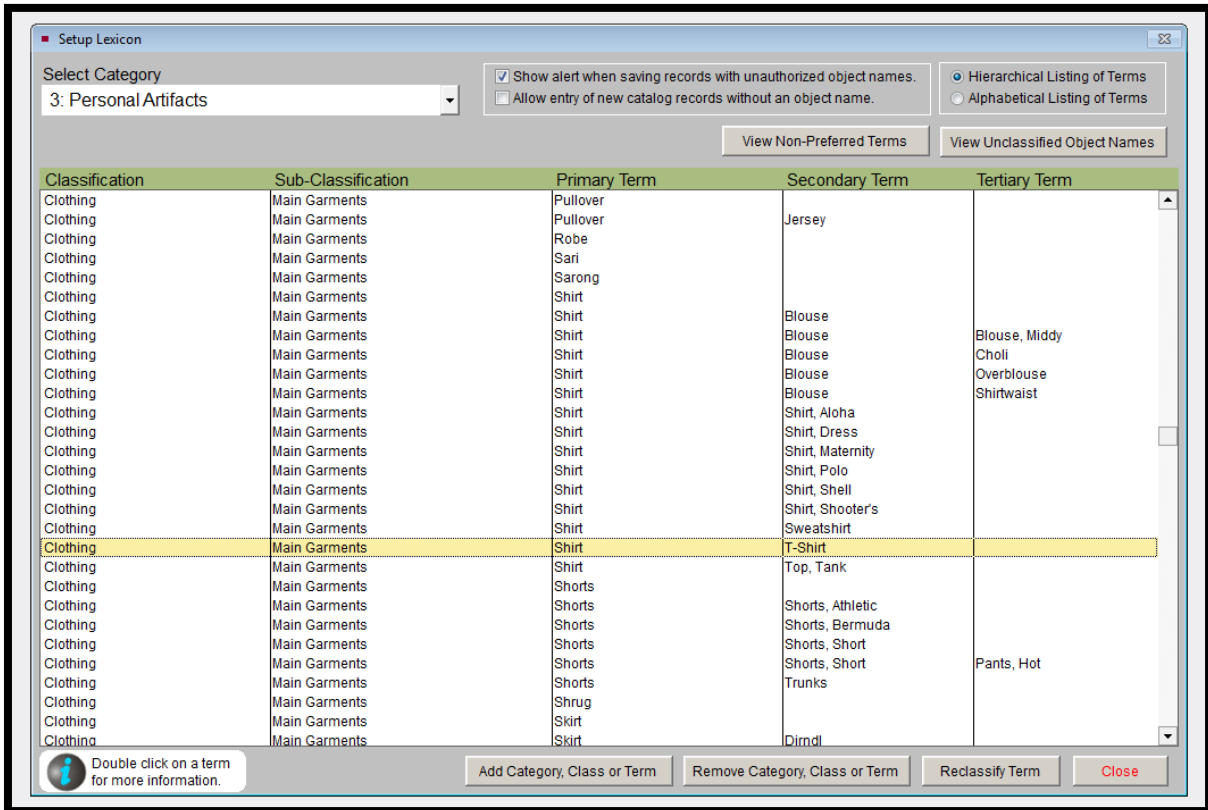


“Select as Object Name” Block, Engraving to change catalog records

3. How to name objects with multiple functions

PastPerfect 5 allows you to have up to three object names associated with one object. For example, to assign object names to a **T-shirt** that is also a **Souvenir**, please do the following:

- Select the primary term **Shirt** or the secondary term **T-Shirt** under the category Personal Artifacts, Classification Clothing, Subclass Main Garments.

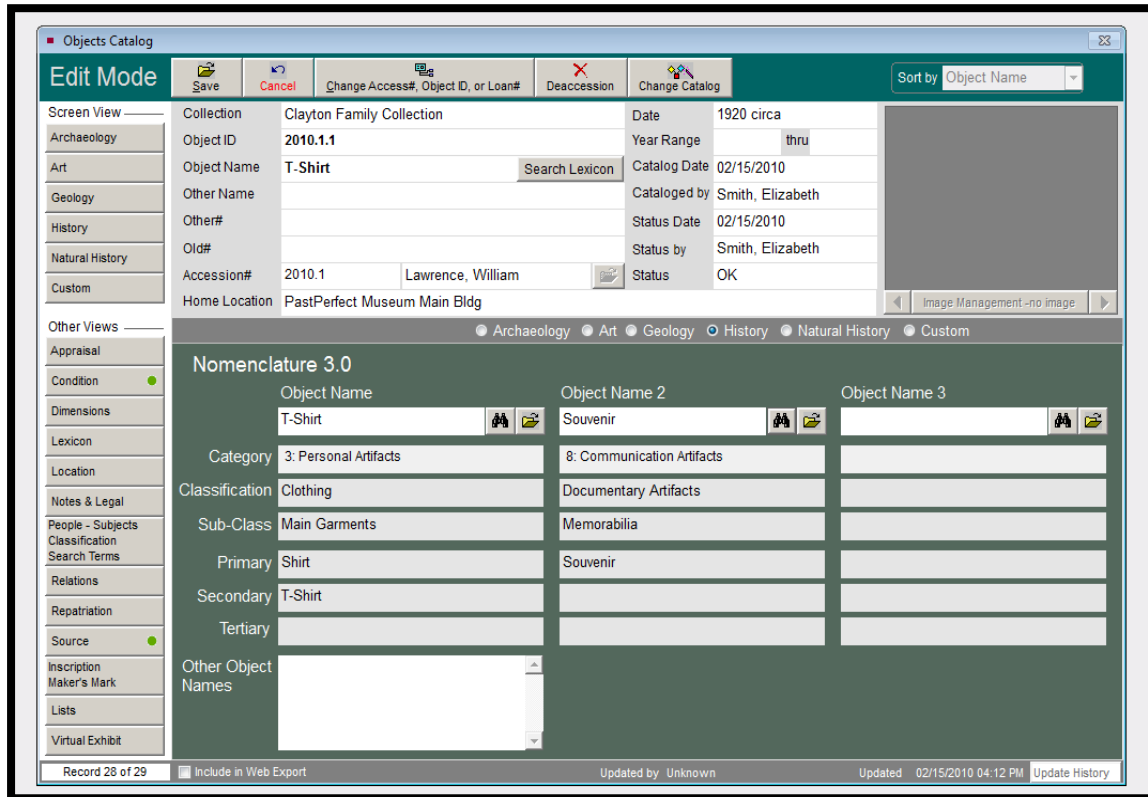


Selecting Primary and Secondary Terms for T-shirt

○ We select this object name and classification first because all T-Shirts have clothing as a function but they are not all souvenirs

- In the lexicon tab from the object catalog record, select Object Name 2
- Enter **Souvenir** as the primary object name under the category Communication Artifacts, sub-classification Memorabilia.

The T-shirt is now associated with two object names for identification and searching purposes.



Assigning Object Name 2 as Souvenir

4. How to name a common household item that serves the function of Art

There are a few options for naming common household items serving the primary function of artwork:

1. Name the object both [Artwork](#) and [Bowl, Serving](#) (or other bowl term suggested by the form) – even if the item was created to be art, it could have a practical application.
2. Add the object name [Bowl, Art](#) to the lexicon. This makes the function obvious and does not confuse it with a local term [Bowl](#) that may have been added to the lexicon under Food Service T&E.
3. Name the object [Artwork](#) and in the other name field, use the term [Bowl, Art](#).

5. Can an object be named using a secondary or tertiary object name?

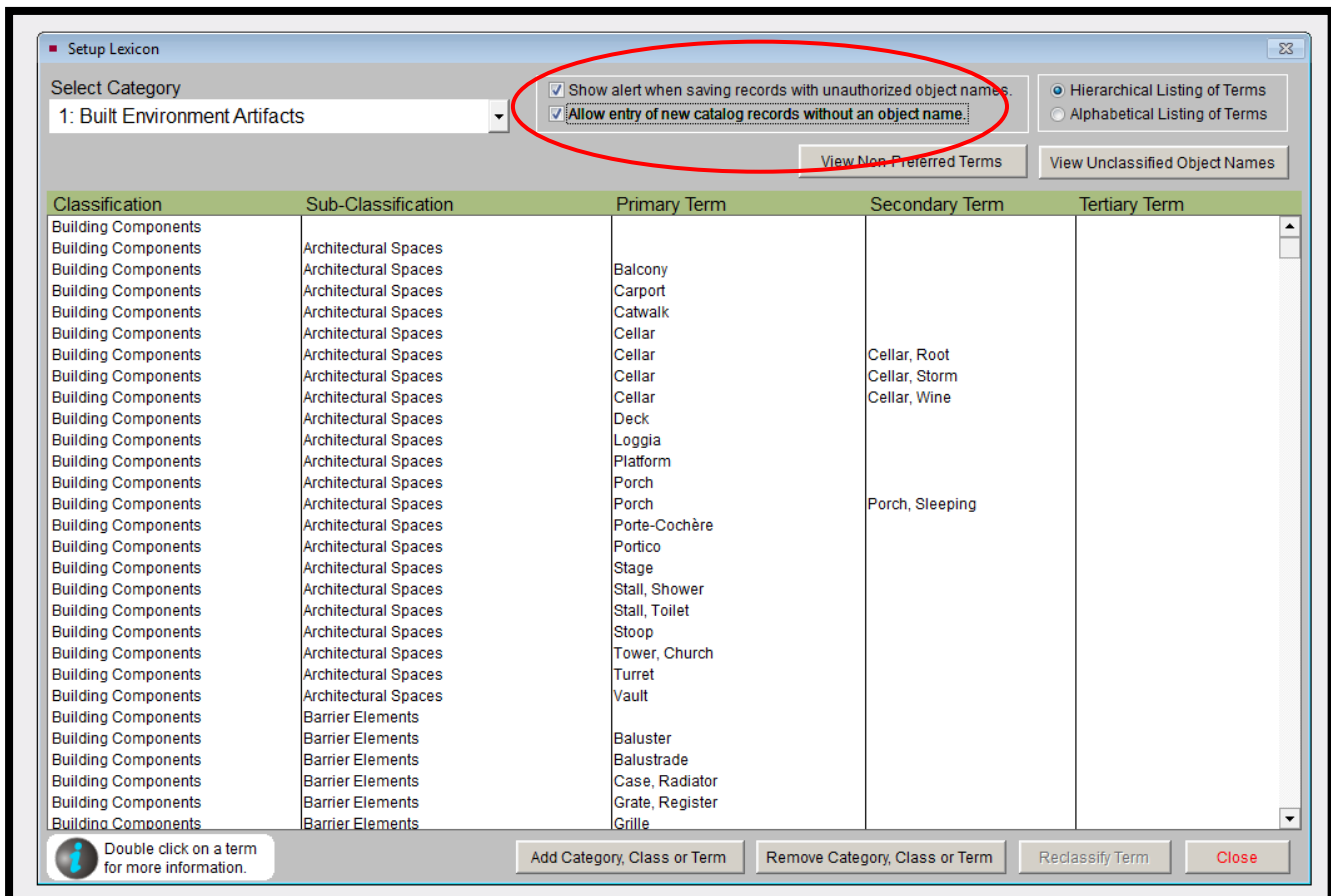
An example of this is the term [Blouse](#), which is a secondary term used to more specifically describe a type of [Shirt](#), which is a primary object name.

You may assign the object name [Blouse](#) to an artifact even if it is a secondary term. When you enter the term [Blouse](#) in the Object Name field, it is assigned to the hierarchy of *Nomenclature 3.0* as shown:

- Object Name: Blouse
- Category: Personal Artifacts
- Classification: Clothing
- Sub-Class: Main Garments
- Primary: Shirt
- Secondary: Blouse

6. Catalogers do not always have the time to look up appropriate object names when cataloging and want to use the familiar local object names. How should this be managed?

PastPerfect has a settings option that allows objects to be entered and cataloged without entering an object name. This can be useful when students or volunteers work on cataloging but may not be familiar with *Nomenclature 3.0*.



Selecting option for cataloguing without an object name

- Select this option within the lexicon screen

- Volunteers should leave the Object Name field blank and input the local term into the Other Name field
- Staff familiar with *Nomenclature 3.0* should regularly update

Note: If you enter local terms in the Object Name field, the process of formally converting to *Nomenclature 3.0* will be more difficult as it has been based on the correct usage of the Revised Nomenclature

7. How should a non-traditional souvenir be assigned an object name?

An example of this could be a teapot purchased as a souvenir that does not serve the function of a teapot:

- Catalog it with the object name [Souvenir](#)
- You may choose to enter the term Teapot in the Other Name field

If the teapot can function as a teapot, follow the instructions from the T-shirt example above.

8. Why is an object name listed as unclassified in Nomenclature 3.0 and how can it be fixed?

One of the most frequent causes of object names being designated as un-classified has to do with data entry. Entering words in the wrong format or with spelling mistakes will produce the same errors as object names not found in *Nomenclature 3.0* and should be fixed and generally avoided.

Two examples follow and they can be updated within the unclassified object list found in the lexicon:

1. [Machine, Can-Capping](#) should be changed to [Machine, Can Capping](#)
 - Select the term [Machine, Can-Capping](#) from the unclassified object list
 - Click to select new term
 - From the lexicon select [Machine, Can Capping](#),
 - Select to change all
 - This will automatically update all records where [Machine, Can-Capping](#) needs to be changed to [Machine, Can Capping](#)
2. [Machine, Tobacco Making](#) should be changed to [Machine, Tobacco](#)
 - Select the incorrect term from the list
 - Click to select new term
 - From the lexicon select the new object name of [Machine, Tobacco](#)
 - Click to change all

9. How should an unidentified object be cataloged?

The correct *Nomenclature 3.0* object name for an unidentified artifact is [Artifact, Unidentified](#).

10. Understanding preferred / non-preferred terms

In the lexicon, you can pull the list of preferred terms. This can be a common name that has a new, preferred name that should be used or a term from Revised Nomenclature that has been changed or updated in *Nomenclature 3.0*.

Example: [Booklet](#) was an appropriate term under Revised Nomenclature but not in *Nomenclature 3.0*. Now, instead of the word booklet, use [Pamphlet](#). To update, do the following:

1. When cataloging new artifacts, if you enter the term [Booklet](#), a yellow window will pop up and it will offer you the option of using the term [Pamphlet](#).
 - Accept the suggestion and you are done. If you would like, you can use the term [Booklet](#) in the Other Name field.
2. Print out the list of non-preferred terms from Reports for review
 - In the lexicon under unclassified object names select the object name [Booklet](#) and change to new name [Pamphlet](#)
 - Accept the change to update all records

General Reminders for Cataloging and the Use of *Nomenclature 3.0*

- Be consistent in naming objects
- Assign one staff member to oversee and manage the use of *Nomenclature 3.0* and all internal lexicons
- Be aware to check for spelling or word placement errors before adding a new object name to the lexicon
- Before adding new terms to the lexicon, double check to make sure an appropriate term does not already exist in *Nomenclature 3.0*
- When adding terms to the lexicon, try to keep the structure consistent with *Nomenclature 3.0*
- *Nomenclature 3.0* is intended to be flexible and is a tool to help museums name and identify objects based on function
- Consider using the other name field, secondary and tertiary object names, and title fields for greater searching capabilities

Additional resources can be found at the AASLH Nomenclature community website at <http://aaslhcommunity.org/nomenclature>