

# 5

## THE ACCESSION PROCESS

### INTRODUCTION TO REGISTRATION

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The professional museum goes beyond simply collecting objects; it must also collect information. Often the importance of careful registration and cataloging are overlooked in the busy environment of local museums and small historical societies. The task of registrar may fall to a volunteer. PastPerfect Museum Software is designed to help address the needs of organizations with little or no training in collection management.

#### WHAT IS AN ACCESSION?

An accession is one or more objects acquired at one time from one source, constituting a single transaction between the museum and a source (Burcaw 1997).

#### WHAT IS REGISTRATION?

Registration is the process of developing and maintaining an immediate, brief, and permanent means of identifying an object for which the institution has permanently or temporarily assumed responsibility (Nauert 1979).

The registration system is the museum's memory. Some would argue that the records are as important as the objects themselves. Keeping good records is a primary function of a good museum. Your museum has placed its collections in your hands. Someday you will pass the collection on to its next caretaker. It is your

fundamental responsibility to hand over the collection and its records in good condition.

**The registration system ensures that:**

- The museum's right of ownership of the object is established
- Associations with a person, place or event are preserved
- Interpretation of the object is enhanced
- Preservation of the object is aided
- The museum can identify and account for every object in the collection (Reibel 1997)

**What do you really need to know about each object?**

- Accession number (Where did it come from?)
- Object ID or catalog number (What is its unique identifying number?)
- Object name (What is it?)
- Location (Where is it kept?)
- Description (What does it look like?)
- Date (How old is it?)
- Dimensions (What features distinguish it from everything else?)

If your organization is brand new, you have the unique opportunity to begin truly at the beginning. Your task is to implement a registration system that is easy to understand, flexible and expandable. This can be accomplished by starting with a numbering system that is in keeping with professional standards throughout the museum community. You do not have to reinvent the wheel. The three-part numbering system is standard in the history museum field and is readily understood by museum professionals.

## THE THREE-PART REGISTRATION NUMBER

The three-part registration numbering system is both simple to apply and expandable. To begin, assign each accession to the year it was received. For example, if the item or group of items was received by the museum in 2001, then 2001 is the first part of the three-part number. The second part of the number is derived from the chronological order in which the accession was received. For example, the first group of items received in the year 2001 would

be assigned the number 1. Now our number has two parts: 2001.1. This number, 2001.1, is the accession number for the item or group of items.

To further distinguish the items within the accession, simply add item numbers to the accession number to give each item in the accession a unique Object ID number. For example, the first item in the accession would be given the Object ID number 1, the next would be 2, and so on. Now our first item in the accession has the unique Object ID number 2001.1.1, the second item would be 2001.1.2, and so on. Thus the system has given you three pieces of information: the year of the accession, the number of gifts in a given year, and the number of items in each gift. This system is simple to understand and unlimited in application.

There are obvious advantages to the three-part numbering system. You do not have to worry about how many objects are in each accession. It is expandable to accommodate any number of items. The second advantage, and perhaps the most important, is that it identifies the source of the donation. The accession portion of the number can be related easily to the donor information. In PastPerfect, this information can be viewed from any record in the Objects, Photos, Archives, or Library catalogs by clicking on the file folder icon to the right of the Accession number and source name, or by moving the mouse over or clicking the Source button on the Sidebar on the left side of the screen.

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## TIP

File folder icons in PastPerfect are links to more information. In catalog screens, the file folder icon to the right of the Accession# and Source fields is the link to view the related accession record.

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Some curators are tempted to use letters in their numbering system to save time. In sets of objects such as teacups, the temptation is to assign one Object ID number and distinguish the various cups by letters: a, b, c, d, etc. This is a common sight in collections:

2001.1.1a Teacup  
2001.1.1b Teacup

Or, sometimes:

2001.1.1a–b Teacups

In sets of objects, such as identical teacups, you should number them individually. Think of them as a set of identical twins. You wouldn't name your children William-a and William-b. They have individual histories and may not always be together. In addition, the two cups will certainly have different condition reports, just as the children will have different medical histories. The two sets of information will be difficult to record on only one collection record. Don't be tempted to corrupt a perfectly good numbering system in this way. The relationship between the two objects can be recorded in PastPerfect through the **Related Items** function. This will be discussed in detail in *Chapter 6 - The Objects Catalog*.

Don't ask your numbering system to work too hard. Some curators attempt to use the accession and Object ID numbers to classify objects. Most of these systems break down as soon as they are implemented. For example: you may be tempted to use the prefix "T" to indicate tools. Soon you realize that you have carpenter's tools (CTs) and shipwright's tools (STs); next you identify seamstress's tools (ST2s), blacksmith's tools (BTs), and dentist's tools (DTs). Very soon you will need a scorecard to understand your own system. In addition, a numbering system that employs alphabetical prefixes will soon have items with identical numbers differing only in prefix. Museums with such numbering systems will find their record keeping complicated and confusing.

If you already have a registration system in place, PastPerfect can accommodate it as long as each item has a unique Object ID or catalog number. In the past, many museums simply assigned a chronological number to each accession. For example, a group of items might be given the accession number 5000 because that is the next number in the sequence. The individual items in the accession would be assigned chronological numbers as well. Thus, the items in this system might be assigned the unique Object ID numbers 5000.1, 5000.2, 5000.3, etc. The next accession would be 5001 and so on. This system will work in PastPerfect because each item has a unique number.

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## THE ACCESSION SCREEN

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The PastPerfect Accession screen can be used to add, edit, and print accession records. It displays the source information as well as the received by and accessioned by names and dates at the top of the screen. When adding a new accession record, you can import a donor's name and address from the Contacts

file to fill in the source information. On the Sidebar on the left of the Accession screen are additional screen views and actions. A green data light will appear on the buttons where there is information within the screen view. By moving your mouse over or clicking on the **Description** button, you can view the general description of the accession, notes, and restrictions. A list of catalog records that are in the accession can be viewed by moving the mouse over or clicking the **Catalog Records** button. Activities that need to be performed or have been performed relating to the accession can be viewed by moving the mouse over or clicking on the **Activities** button. The buttons under the **More Screens** section allow you to access the Thank You Letter and Deed of Gift. Use the **Thank You Letter** button to display and print a letter to the donor. The **Deed of Gift** button allows you to edit or print a Deed of Gift form. If you have more than one donor for an accession, you can view them, as well as print a Deed of Gift and Thank You Letter for them, by clicking the **Add/View Additional Donor** button. The **Update History** button allows you to see who made changes to the accession record and when.

The buttons under **Actions** allow you to add, edit, or delete catalog records linked to an accession, and add or edit activities. You can also change the accession number if it was entered incorrectly.

The Deed of Gift form and Thank You Letter are prepared automatically from donor information entered when adding the accession record and from information contained on the **Default Deed of Gift** form and the **Default Thank You Letter**. These default forms are accessed by going to the Main Menu | Setup | Collections | Accessions. These forms will be discussed later in this chapter.

## ACCESSION NUMBER VS. OBJECT ID NUMBER

In PastPerfect, the accession number refers to the unique number that defines an item or group of items received from a single source at one time. Essentially, the accession number refers to the transaction of the item or items rather than the items themselves. The Object ID is the unique catalog number assigned to each item. An accession may contain any number of items with unique Object IDs.

## THE ACCESSION PROCESS WITH PASTPERFECT

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When objects come into the museum, they should be evaluated before being accessioned into the collection. Temporary Custody allows you to record important information about the source and print a receipt for the donor prior to the museum's decision to accession and number the items. Once the decision has been made to accession the objects, an accession record and number will be assigned to the collection. However, there may be occasions when items are accessioned immediately. This chapter will explain how to fill out the Accession form.

The basic steps to accession items into the collection are:

1. Click on the **Accession** button in the **Activities** menu.
2. Add a new accession record.
3. Complete the form by entering data in each field.
4. Click the **Save** button to save the entry.
5. Add catalog records to the accession.
6. Complete the **Deed of Gift** and **Thank You Letter**.
7. Enter upcoming activities for the accession.

### STEP 1: CLICK ACCESSION

To open the Accession screen, click on the **Accession** button in the Activities menu on the PastPerfect Main Menu. The accession record that was last viewed will display. If this is the first accession record entered, the screen will display blank data fields.

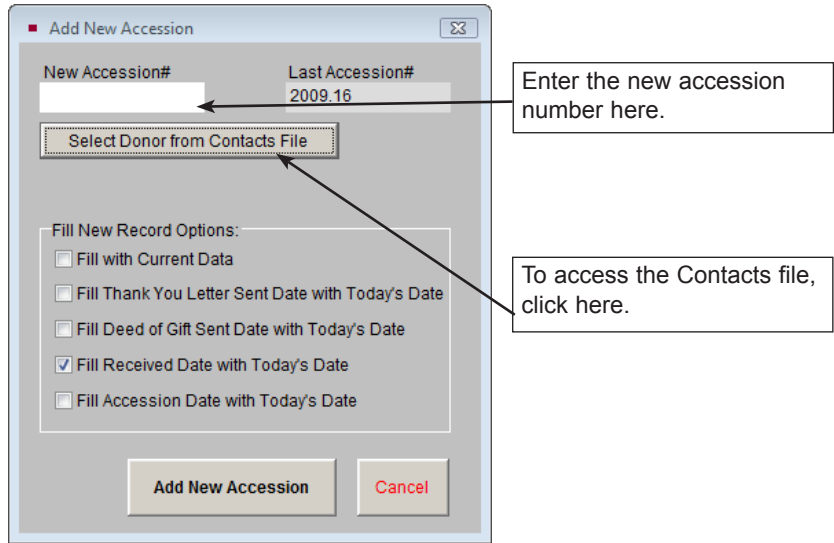
### STEP 2: ADD A NEW ACCESSION RECORD

Click on the **Add** button at the top of the Accession screen to display the **Add New Accession** screen.

Type the new accession number in the blank box labeled **New Accession#**. Accession numbers can be up to 15 characters long, including numbers and punctuation. PastPerfect recommends assigning two-part numbers, such as 2001.1, where the first four digits represent the year of accession and the next digits identify the

chronological order of the accession in the year. However, PastPerfect will support any numbering system that your museum may already have in place. The number that was last assigned is displayed for your reference in the **Last Accession#** field.

Figure 5-1  
Add New  
Accession  
screen



Click **Select Donor from Contacts File** to view a list of all names entered in your Contacts file. If the donor is already in your Contacts file, double click on the name to select it. The donor information will automatically be entered in the accession record.

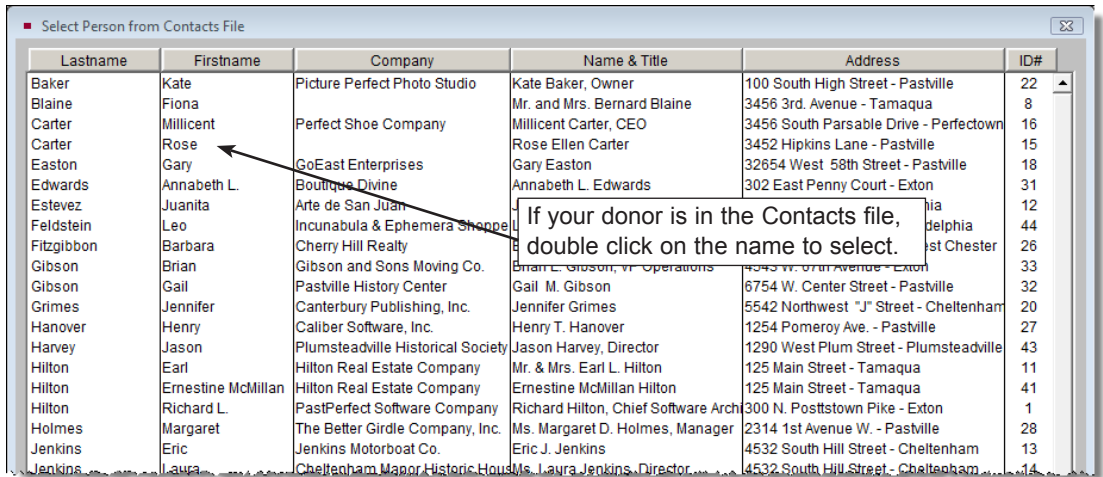


Figure 5-2 Select Donor from Contacts File

By selecting the donor's name from the list, you create a link between your Contact and Accession records. Later, you can view a list of all donations given by a particular contact, whether the donations were monetary or collection items. If the donor's name does not yet appear in your Contacts list, click the "X" button in the top right corner to return to the Add screen. You can add the name to the accession record manually, but it's a good idea to add all new donors to the Contacts file before beginning the new accession record.

If you have more than one donor for your accession, you can add multiple donors and link them to existing Contact records. This will be discussed later in this chapter.

The check boxes in the **Fill New Record Options** section provide you with some shortcuts.

If **Fill with Current Data** is checked, PastPerfect will copy all information, including the donor's name and address, from the last viewed record. Check this box *only* if you have not selected a new donor name from the Contacts file and *only* if the donor for the new accession is the same as the donor on the Accession screen showing behind the Add screen.

If **Fill Thank You Letter Sent Date with Today's Date** is checked, the program will automatically insert the current date in the Thank You letter's Date field. Check this box if you would like to add the current date by default.

If **Fill Deed of Gift Sent Date with Today's Date** is checked, the program will automatically insert the current date in the Date Sent field on the Deed of Gift screen. Check this box if you would like to add the current date by default.

If **Fill Received Date with Today's Date** is checked, the program will automatically insert the current date in the Received Date field. Check this box if you would like to add the current date by default.

If **Fill Accession Date with Today's Date** is checked, the program will automatically insert the current date in the Accession Date field.

Once you have entered the new accession number and chosen the pertinent shortcuts, click **Add New Accession**. PastPerfect will verify that the accession number you assigned is not a duplicate. If it is a duplicate, you will be asked to enter a new, unique accession number.



## STEP 3: COMPLETE FORM BY ENTERING DATA IN EACH FIELD

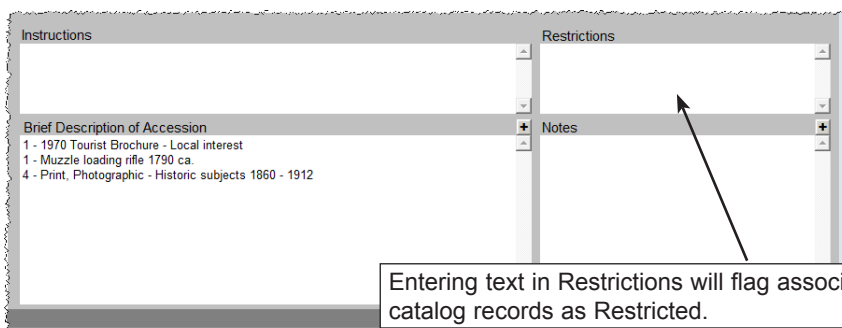
A detailed description of each field may be printed from the Reports menu. Go to the Main Menu | Reports | Accession | Accession Field Descriptions to preview or print the report. To view the field descriptions while remaining in the Accession screen, you can use the **F1** key on the keyboard. Click in the field in question, then press the **F1** key to display the definition of the field.

To enter data in a field, move the cursor to the field and start typing. To advance the cursor to the next field, press the **Tab** key. To move the cursor to the previous field, press **Shift+Tab**. You may use the mouse to jump to any field on the screen by positioning the mouse arrow over the field and clicking the left mouse button.

If you have not already selected the donor from the Contacts file, enter the source or donor in the **Source** field. If the donor is an organization and you have an individual person's name as well, enter that in the **Contact** field. If you chose the donor from your Contacts file, these fields will be filled in automatically. If you are entering them manually, it is suggested to enter the source as Last name, First name and the contact name as First name Last name. Entering the source this way allows you to sort the sources alphabetically by last names. Continue entering data for all the fields for which you have information.

If there are any specific instructions for the way this accession needs to be managed, enter them in the **Instructions** field. If there are any restrictions on the accession, note them in the **Restrictions** field. Please be aware that each catalog record related to this accession will then be marked with a red flag showing that there are restrictions. If you do not want every item in the accession marked as restricted, leave the **Restrictions** box blank and note restrictions on individual catalog records.

Figure 5-3  
Description  
Screen View  
in Accession  
Catalog



In the **Brief Description of Accession** field, enter a brief description of the items received. The description will appear on the Thank You Letter and Deed of Gift. Any additional information can be entered into the **Notes** field. If you have entered data in any of these fields, the green data light will appear on the Description button under Screen View.

### STEP 4: PRESS THE SAVE BUTTON TO SAVE THE ENTRY

When you have finished entering information in the data fields, click the **Save** button at the top of the screen. If you do not want to save your record, click the **Cancel** button.

As it saves, the program will prompt you to verify the donor's name as it will appear on the Deed of Gift form, the Thank You Letter Address name, and the Thank You Letter Dear name. To make any changes, just type in the box before clicking **Done**.

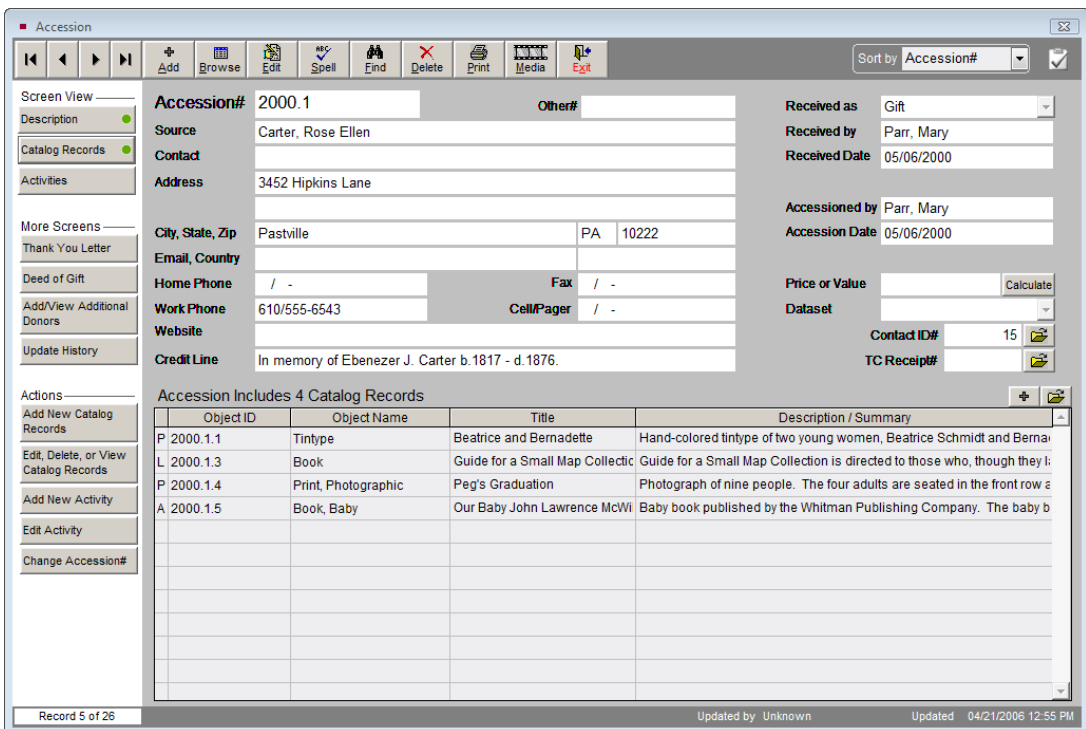


Figure 5-4 Accession screen

If you chose your donor from the Contacts file when adding your accession, the **Contact ID#** field will be filled in with the Contact ID# for that contact. You may view the Contact record by clicking the file folder icon to the right of the ID#.

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## NOTE

If you created your accession record before adding the donor into the Contacts file, you can link a new Contact record to an existing accession. Go into the Contacts file and find the Contact ID# for the donor, then enter the number in the Contact ID# field on the accession record.

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If your accession record was created by transferring a Temporary Custody receipt into the accession catalog, the Temporary Custody receipt number will display in the **TC Receipt#** field. You may view the Temporary Custody record by clicking the file folder icon to the right of the **TC Receipt#** field.

Click the **Print** button at the top of the screen and choose **Accession Form** to print out a hard copy of the completed Accession Form.

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## TIP

Customize the layout of the printed Accession form by going to the Main Menu | Reports | Accession | Accession Form | Custom Layout 1 or 2 | Modify Selected Layout.

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## STEP 5: ADD CATALOG RECORDS TO THE ACCESSION

Once you have entered the data for the accession record, you will need to add the items to the catalog record list. To add these items, click the **Add New Catalog Records** button in the **Actions** section.

Select the correct catalog for the new item by clicking the Object, Photo, Archive, or Library radio button at the top of the screen. There are two options at the top of this screen to help you with your data entry. The first is **Pre-fill Object ID with Accession#**. If this box is checked, the **Object ID** field will automatically be filled in with the Accession#. This allows you to create your Object ID quickly by adding just the item number to the end of your Accession#. Use this option only if your Object IDs contain your Accession#. The second option is **Pre-fill Catalog Date**. If this box is checked, the **Catalog Date** field will automatically be filled in with today's date.

Figure 5-5 Add Object Catalog Record to Accession

On the left side of the screen are **Options**. The **Clear Data Entries** button will remove text from all fields except the Accession#. The **Fill with Default Data** button will fill in the fields with the data from the Default record in the selected catalog. To help you find and choose an Object Name from the Lexicon, you can use the **Search Lexicon** button to view the Lexicon screen. You can use the **Search AAT online** button to open the AAT website in your internet browser. By clicking the **Add Condition Report** button, you can complete a condition report for this item.

Once you have filled in the appropriate data fields, click **Add this Item** to create the new catalog record. The new item will appear in the list of catalog records viewable by moving your mouse over or clicking on the **Catalog Records** button. Additionally, a record will be created in the appropriate catalog. To fully catalog the item, open the Objects, Photos, Archives or Library catalog screen from the Main Menu, find the new record, and click **Edit**. In the accession record, a green data light will appear on the **Catalog Records** button to indicate catalog records are linked to the accession.

## TIP

You may add new catalog records directly in the Objects, Photos, Archives, or Library catalogs. As long as you enter the Accession# on the catalog record, the catalog record will display on the Catalog Records screen on the Accession record.

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From the Accession screen you may also click on the **Edit, Delete, or View Catalog Records** button to view details about the catalog records contained in the accession. From this screen you can edit the record, delete the record, fill out a detailed condition report about the item, link an image or multimedia file to the record, move the record to a different catalog, and view the entire catalog record.

**Price or Value** - The Accession screen includes a field for the price or value of the entire accession. You may enter a number in this field by clicking the **Edit** button and typing in the number. Or, if you have entered a value for the items in this collection in the Acquisition Value field on the catalog records, you may click the **Calculate** button to have PastPerfect add those numbers together and fill in the field with the sum. Please note that this calculated value will replace any number you had typed into the field.

## STEP 6: COMPLETE THE DEED OF GIFT AND THANK YOU LETTER

On the Accession screen, use the **Thank You Letter** button to display and print a letter to the donor. Thank you letters for additional donors can be displayed and printed by clicking the **Add/View Additional Donors** button. The **Deed of Gift** button will allow you to edit or print a Deed of Gift form.

The Deed of Gift form and Thank You Letter are prepared automatically from donor information entered when adding the Accession record and from information contained on the Default Deed of Gift form and the Default Thank You Letter. These default forms may be accessed by going to the Main Menu | Setup | Collection | Accessions. The steps for modifying the form and letter are below.

### Modifying the Default Deed of Gift

On the Accession screen in Setup Collections, the top part of the screen holds the information for your Default Deed of Gift, as seen in Figure 5-6.

Figure 5-6  
Default Deed  
of Gift fields

Click in the first box and enter the name and address of your institution. The second box is for the default legal text of your Deed of Gift contract. By using the Default Legal option, you can enter text for your standard Deed of Gift. Place a dot in the **Default Legal** radio button before entering this text. This text will appear on all new Deed of Gift forms when you have the Default Legal option selected. You also have a Custom Legal option, which you can use if the Default Legal wording does not apply for an accession. The third box is for the **Footer**, which appears above the last signature line on the Deed of Gift form. In this example, we used it for the statement confirming receipt of the gift.

The **Default Received as** field at the bottom of this screen allows you to enter a default term for this field. Click **Exit** to complete your modifications.

## NOTE

You may have noticed some text that appears on the Deed of Gift form does not appear on the screen for modification. It is possible to customize that text as well as modify the layout of the form. Go to the Main Menu | Reports | Accession | Deed of Gift | Custom Layout 1 or 2 | Modify Selected Layout.

## Modifying the Thank You Letter

The Accession screen in Setup Collections also has a button for **Setup Default Thank You Letter**. This will open the Default Thank You Letter screen in MS-Word as seen in Figure 5-7.

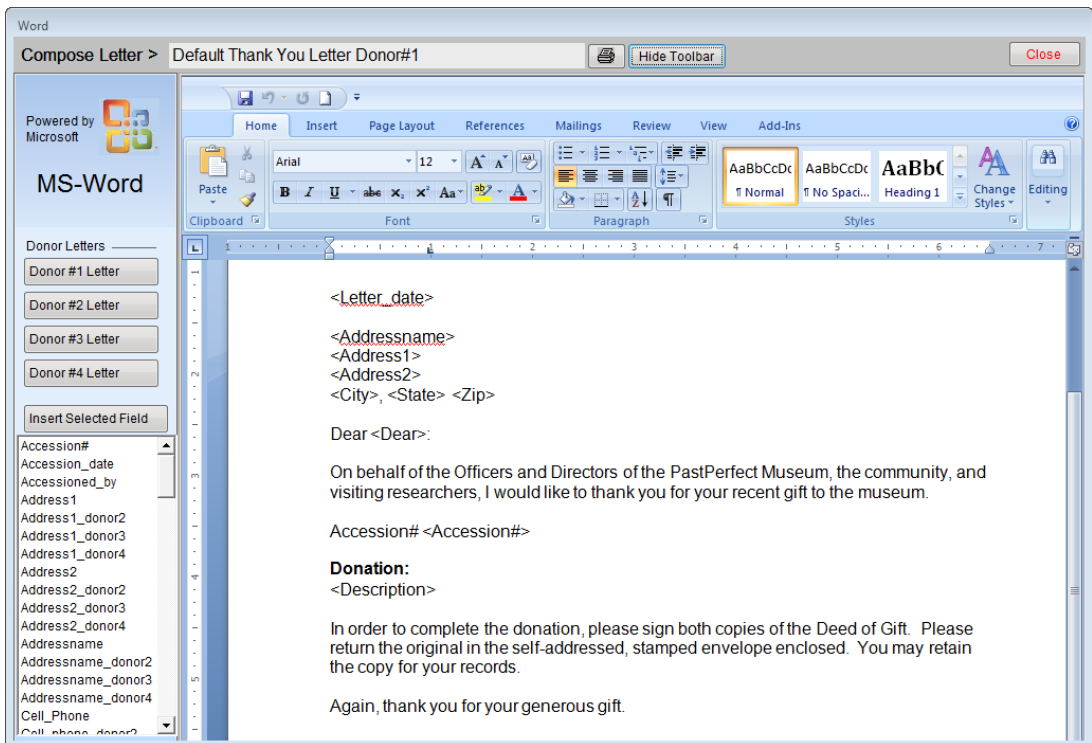


Figure 5-7 Default Thank You Letter

Four default letters can be composed, one for each donor. Click on the appropriate donor button on the left side of the screen to select a letter. The default body text

appears in the document to the right. Click on the screen and type to edit the text. The letter that you see is a mail merge letter which means that you can include fields that will be replaced by data from the Accession record. These mail merge fields must be chosen from the list of available fields on the left. They will appear in angle brackets such as <Letter\_date>, <Address1>, <City>. To insert a field, first place your cursor in your letter where you want the field to be inserted, then click on name of the field you want and click the **Insert Selected Field** button.

Please see *Chapter 22 - Letters, Labels & Email*, for more information about working with letters. Click **Close** and save your changes, then return to the Setup Collections screen. Then click **Exit** to return to the Main Menu.

## View and Print the Deed of Gift

Return to the Accession screen by clicking the **Accession** button on the Main Menu. To view the Deed of Gift, click on the **Deed of Gift** button.

Figure 5-8  
Deed of Gift

The screenshot shows a window titled "Deed of Gift" with a standard Windows interface. At the top, there are buttons for "Edit", "Preview", "Print", and "Close". Below these are two rows of status and date fields: "Status Deed of Gift sent [checked] Date Sent // Deed of Gift Returned [checked] Date Returned //".

The main form contains the following fields and sections:

- Name:** Rose Ellen Carter
- Date:** 05/06/2000
- Address:** 3452 Hipkins Lane
- City:** Pastville
- State:** PA
- Zip:** 10222
- Phone Home:** [empty]
- Work:** 610/555-6543
- Fax:** [empty]

Below the contact information are two radio buttons: "Default Legal" (selected) and "Custom Legal".

The "Description of Gift" section contains a text area with the following text: "I own the personal property described below and desire to give said personal property to the PastPerfect Museum. I do hereby irrevocably and unconditionally give and transfer to the PastPerfect Museum all right, title, and interest, including all copyright, trademark, and related interests, in and to the following described property."

The "Description of Gift" text area lists the following items:

- 4 - photographs of Carter family
- 1 - Book - Guide for a Small Map Collection
- 1 - Book - Forties Fabric
- 1 - Baby book 1930 (McWilliams Family)

At the bottom of the form, there are several signature and date fields:

- "By my signature below I accept the forgoing condition and acknowledge reading any attached information."
- "This gift is given in memory of:" followed by a text field containing "John Wesley Carter"
- "Dated:" followed by a line for the date.
- Two lines for "Donor/Agent" signatures.
- "Date Received:" followed by a line for the date.
- "Received by:" followed by a line for the recipient's name.
- A large text box containing: "THE GIFT DESCRIBED ABOVE IS ACCEPTED FOR THE PASTPERFECT MUSEUM."
- "By:" followed by three lines for "Name", "Title", and "Date".



At the top of the screen, seen in Figure 5-8, you can record when the Deed of Gift was sent and when it was returned. To edit the check boxes and dates, click the **Edit** button at the top. There may be times when you'd like to change the legal text for one Deed of Gift without changing the default settings for all future Deeds of Gift. To do so, click the **Custom Legal** radio button, and click **Edit**. Type in the custom legal text and click **Save**. Your changes will affect this Deed of Gift form only. To make changes to the default data, you must follow the procedure outlined above. The text box at the bottom is for the **In Memory Of** information if the donor wishes to acknowledge someone in this way. The text in the footer comes from the default form and cannot be modified here.

When you are ready to print the Deed of Gift, you can click **Preview** to view the document first. Proofread the document, and then click the printer icon to print. If you need to make changes before printing, exit from the preview and click on the **Edit** button. Then click the **Print** button at the top to print.

## View and Print the Thank You Letter

To print a Thank You Letter for a completed accession, click on the **Thank You Letter** button on the Accession screen. You should now see an MS-Word document with the mail merge fields replaced with data from the Accession record, as in Figure 5-9. Proofread the document. You may edit and personalize the letter here if desired. Changes made here will not affect the Default Thank You Letter form.

The **Rebuild Letter** button will rebuild the Thank You Letter based on the most current data from the Accession screen and the default Thank You Letter text.

The **Print Envelope** button will print an envelope for the letter. Since not all printers handle the printing of envelopes, and those that do often require different formats, this option may require adjustments to the envelope layout to print properly. You can set up the envelope to print with your printer from the Reports menu by going to the Main Menu | Reports | Accessions | Thank You Letter Envelope | Custom Layout 1 or 2 | Modify Selected Layout.

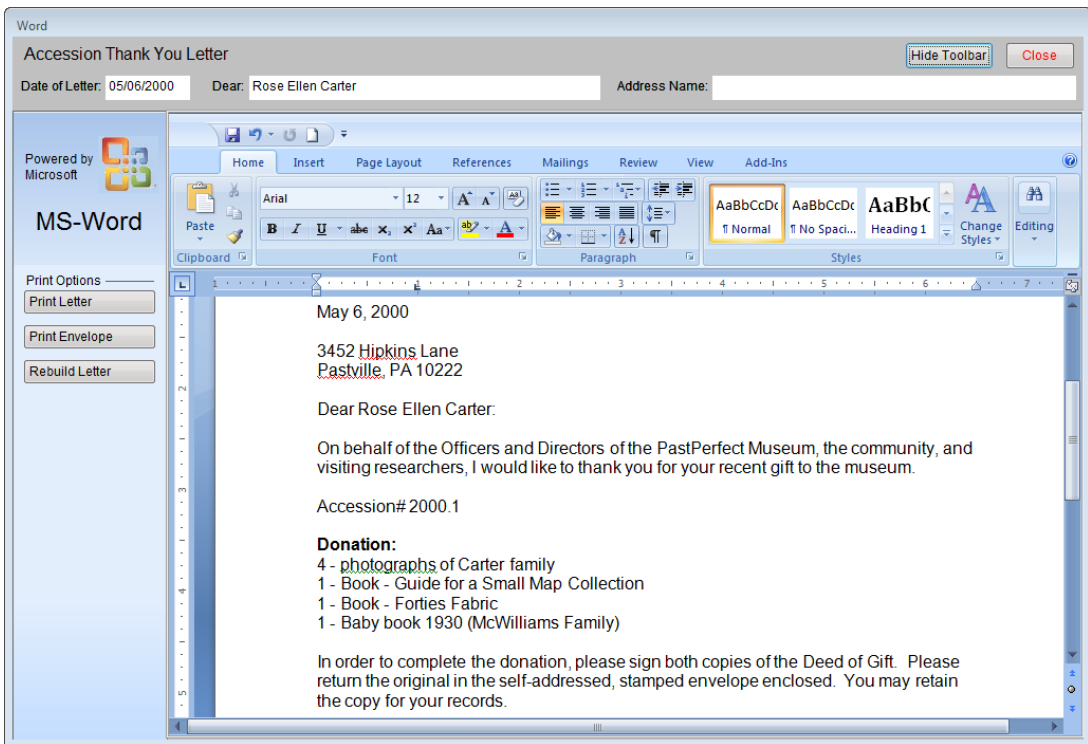


Figure 5-9 Thank You Letter

## MULTIPLE DONORS

The Accession record will allow you to record information about three additional donors. A separate Deed of Gift and Thank You Letter may be printed for each donor.

To add another donor, click on the **Add/View Additional Donors** button to open the screen in Figure 5-10.

You can type in the donor information or click **Add from Contact File** to select a donor from your Contacts file. If you add an additional donor, a green data light will appear on the **Add/View Additional Donors** button to indicate there are additional donors.

The screenshot shows a window titled "Other Donors" with "Edit" and "Close" buttons. It displays two donor records:

Donor #	Contact ID	Source	Contact	Address	City, State, Zip	PA	19654	19104	Phone Numbers
Donor #2	13	Jenkins Motorboat Co.	Eric Jenkins	4532 South Hill Street	Cheltenham		19654		Home# / - Work# / - Fax# / - Cell/Pager 000/555-7878
Donor #3	42	University of Pennsylvania	Paul Peterson	451 Walnut Street	Philadelphia		19104		Home# / - Work# 000/555-5000 ext 451 Fax# / - Cell/Pager / -

Each donor record includes buttons for "Add from Contact File", "View Contact File", "Deed of Gift", and "Thank You Letter".

Figure 5-10 Other Donors

## STEP 7: ASSIGN ACTIVITIES

The Accession screen allows you to track activities related to your accession. Common activities include sending the Deed of Gift and Thank You Letters, getting the items appraised, creating condition reports, and photographing the items. You can assign each task to a staff member, give it a due date, then track when the task was completed. This allows you to keep a record of the accession activities on the Accession screen.

**Adding a New Activity** – To add a new activity, click the **Add New Activity** button on the left side of the Accession screen. Or, you can click the **Activities** button and then click the plus sign button above the list of activities. The following screen will appear.

Figure 5-11  
Add New  
Activity

The screenshot shows a dialog box titled "Add New Activity" with a close button. It contains the following fields:

- Activity:** A dropdown menu with a yellow highlight and a down arrow. A callout box points to the arrow with the text: "Click on the down arrow to view the list of activities."
- Due:** A text field containing " / /".
- Done by:** A text field.
- Done:** A text field containing " / /".
- Notes:** A large text area with a scroll bar.

At the bottom of the dialog are "Add" and "Cancel" buttons.

The **Activity** field allows you to choose an activity. This field is controlled by a drop-down authority file. Click on the down arrow to the right of the field to see the choices. To select an activity, click on the term. New terms can be added to the drop-down authority file by going to the Main Menu | Setup | Authority Files | Accession | Accession Activities.

The fields for **Due**, **Done by**, **Done**, and **Notes** can be filled in if desired. The **Done by** field is controlled by the Users authority file. To access the authority file, right click or press the **F7** key. Click **Add** to add this activity to the list of activities.

**Editing an Activity** – As activities are completed, you can enter the date of completion so you have a record of activities and dates. To edit an existing activity, click on the **Activities** button on the Accession screen. Then click once to select the activity you want to edit and click the **Edit Activity** button, double click on the activity, or click the file folder icon above the list of activities.

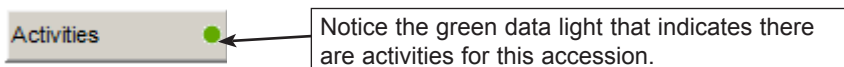
Figure 5-12  
Activities  
screen

Task	Due	Done by	Done	Notes
Deed of Gift Sent	05/11/2009	Parr, Mary L.	05/11/2009	Deed of gift sent
Deed of Gift Returned	06/13/2009	Parr, Mary L.	06/15/2009	Deed of gift returned with signature
Accessioned	06/21/2009	Parr, Mary L.	06/21/2009	Accession number assigned
Appraisal	06/27/2009	Withers,Blanche	07/02/2009	Preliminary appraisal in-house pending expert outside appraisal
Cataloging	09/01/2009	Wilson, Pat	07/21/2009	Items sent to departments for cataloging

To edit the activity, click the **Edit** button, or to delete an activity, click the **Delete** button. Once an activity is complete, enter the date in the **Done** field rather than deleting the entire activity.

Once activities have been added to an accession, a green data light will appear on the **Activities** button to indicate activities have been added for the accession.

Figure 5-13  
Activities  
button



## MULTIMEDIA LINKS

If you have purchased the MultiMedia Upgrade, multimedia links can be established to link multimedia files to your Accession record. You can link files or documents pertaining to the entire accession to the Accession record, so that they can be viewed from the Accession screen. This is helpful if you have scanned documents that were given along with the accession, or you want to have a scanned copy of the signed, returned Deed of Gift.

### NOTE

Multimedia Links is not designed to link images of each item in the accession. Images should be linked on the catalog record screens using the Image Management function.

Multimedia files can be attached by clicking the **Media** button at the top of the Accession screen. The **Multimedia Link Wizard** will appear to guide you in attaching your file. You may attach multiple files to one Accession record.

## THE DEACCESSION PROCESS

PastPerfect provides two methods of deaccessioning items. The first is simply to change the catalog record's status to Deaccessioned. This can be done from the Objects, Photos, Archives, or Library catalog screens that are described later in Chapters 6-9.

Figure 5-14  
Status-  
Deaccessioned



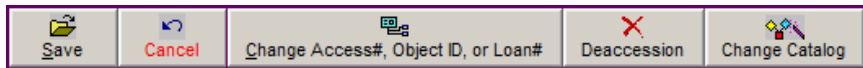
If you prefer to remove deaccessioned items from the catalog, you can use the Deaccession function. This function allows you to remove the items from the catalog and place them in a special Deaccessioned file. Please note that the Accession record will remain for deaccessioned items. You may enter an Activity on the Accession screen to record the deaccessioning of items.

## WARNING

Not all information about the item will be moved to the Deaccessioned file. Information such as condition reports and location histories will not transfer.

To deaccession an item and move it to the Deaccessioned file, first locate the item in the Objects, Photos, Archives, or Library catalog. Then click the **Edit** button. This will reveal the **Deaccession** button. The Deaccession command is only available in Edit mode.

Figure 5-15  
Deaccession  
button



Clicking on **Deaccession** will open the Deaccession screen shown in Figure 5-16, where you will enter the deaccession date, disposal date, disposal method, name of the person authorizing the process, and the reason for deaccession.

Figure 5-16  
Deaccession  
Item screen

 A screenshot of the 'Deaccession Item' dialog box. The title bar says 'Deaccession'. The form contains the following fields: 'Deaccession Date' (//), 'Disposal Date' (//), 'Disposal Method' (dropdown), 'Authorized by' (text input), and 'Reason for Deaccession' (text input). A yellow warning box at the bottom contains the text: 'WARNING: Once a record is deaccessioned, it can be retrieved. However, some data, such as condition reports and location history, will be lost.' At the bottom right are 'Deaccession Now' and 'Cancel' buttons. A callout box with an arrow points to the 'Authorized by' and 'Reason for Deaccession' fields, containing the text: 'Authorized by and Reason for Deaccession must be filled in.'

Finally, click the **Deaccession Now** button to remove the item from the catalog and move it to the Deaccessioned file. The catalog record will also be removed from the list of associated catalog records on its original Accession record. You can print a summary or detailed list of items that have been deaccessioned by going to the Reports screen, clicking on the **All 4 Catalogs** button, and selecting one of the Deaccessioned reports.

To view the items in the Deaccessioned file, click on the **Deaccessions** button from the Main Menu. The Deaccession screen in Figure 5-17 will appear.

Figure 5-17 Deaccession screen

**Global Deaccession** - If you have many items that need to be deaccessioned at one time, and they all have the same disposal date, disposal method, person authorizing the process and reason for deaccessioning, then you do not need to deaccession them one by one. To globally deaccession items with the status set to “Deaccessioned,” click the **Global Deaccession** button in the Actions section of the Sidebar of the Deaccession screen. You will need to enter the deaccession date, disposal date, disposal method, name of the person authorizing the process and the reason for deaccession that will be used for all records being deaccessioned. You can choose to include or exclude records from certain catalogs by checking or unchecking the box next to the catalog. The screen will display the records selected to be deaccessioned. When you are ready, click the **Deaccession All Records NOW** button.

**Return Record to Catalogs** - If you have mistakenly deaccessioned an item and you need to move it back to the catalog where it was originally, you have the option to

do so by clicking the **Return Record to Catalogs** button on the Sidebar. You will be asked if you want to return the record, click **Yes** if you are sure. The record in the Deaccession catalog will be moved to the Recycle Bin and will be deleted when you Reindex. Please note that any data that was not transferred to the record in the Deaccession file, such as condition reports and location histories, will not be recovered. Records that were deaccessioned in PastPerfect version 4.0 or earlier versions cannot be returned to their original catalogs.