10

THE LEXICON

It is important that museums of all sizes adopt a convention for naming objects. PastPerfect's Lexicon is based on the latest standard, *Nomenclature 3.0 for Museum Cataloging*, edited by Paul Bourcier, Ruby Rogers and the Nomenclature Committee. This edition is a revised and expanded version of *The Revised Nomenclature for Museum Cataloging*. *The Revised Nomenclature* broadened the system that Robert Chenhall and his colleagues developed in the 1970s. The original *Nomenclature* was instituted to create a system that gave museums with human-made collections the same level of consistency and specificity that scientific collections have to name specimens. Consistent naming makes research, discovering connections between items, and sharing data easier.

This classification system is a hierarchical grouping of like items. The categories, classifications and terms are organized by object function. *Nomenclature 3.0* is expanded from the previous version and includes thousands of new terms. However it is not meant to be all-inclusive. In keeping with the *Nomenclature* authors' intention to provide a "practical, flexible framework," PastPerfect's Lexicon enables you to add terms for your collections within the framework, use more or less specific terms for object naming, and employ multiple object names for multipurpose and compound items.

Nomenclature 3.0 is built into PastPerfect and accessed when you enter a new catalog record. Each object name is checked against the approved list to ensure consistent data entry.

NOTE If you purchased the 5.0 Upgrade Version, your lexicon is set to Nomenclature 2.0. To change to Nomenclature 3.0, go to the Main Menu and select System Parameters from the Setup menu. Change the Lexicon Nomenclature to "3.0." Then you must reindex all files.

USING THE LEXICON

When you enter new records into PastPerfect, the Lexicon is available to help you choose an appropriate object name or names. The Lexicon enables you to catalog items consistently and place them within a hierarchical classification system based on object function. When you enter an object name, PastPerfect will automatically place the hierarchy of category, classification, sub-classification, and terms into the catalog record. *Nomenclature 3.0*'s three tiers of object terms (primary, secondary and tertiary) give you the opportunity to be as specific as you need in naming items.

When you can, use the most specific name. It may be a tertiary, secondary or primary term. Here is an example where you would select the most specific term, a tertiary term. If your organization has a collection of cooper's tools, you would want to distinguish a cooper's downshave drawknife from other drawknives in the collection. When you enter "Downshave, Cooper's" in the Object Name field, the more general terms, "Drawknife" and "Knife, Woodworking," the Classification and the Category are assigned.

Category: 4: Tools & Equipment for Materials

Classification: Woodworking T&E

Primary Term: Knife, Woodworking

Secondary Term: Drawknife

Tertiary Term: Downshave, Cooper's.

There are times when using more general terms is practical. In the instance that you are cataloging an ax, but are unsure of its specific function (or maybe it had multiple functions), you would select "Ax" as the object name. The secondary and tertiary terms are not used. By entering "Ax" in Object Name, the Category "4: T&E for Materials" and the Classification "Woodworking T&E" will automatically be selected.

To use the Lexicon when cataloging, click the **Add** button in the Navigation Bar in any catalog. The **Add New Catalog Record** screen opens as shown in Figure 10-1.

To search for an object name using the Lexicon, click the **Lexicon** button to the right of the Enter Object Name field. The **Search Lexicon** screen opens, seen in Figure 10-2.

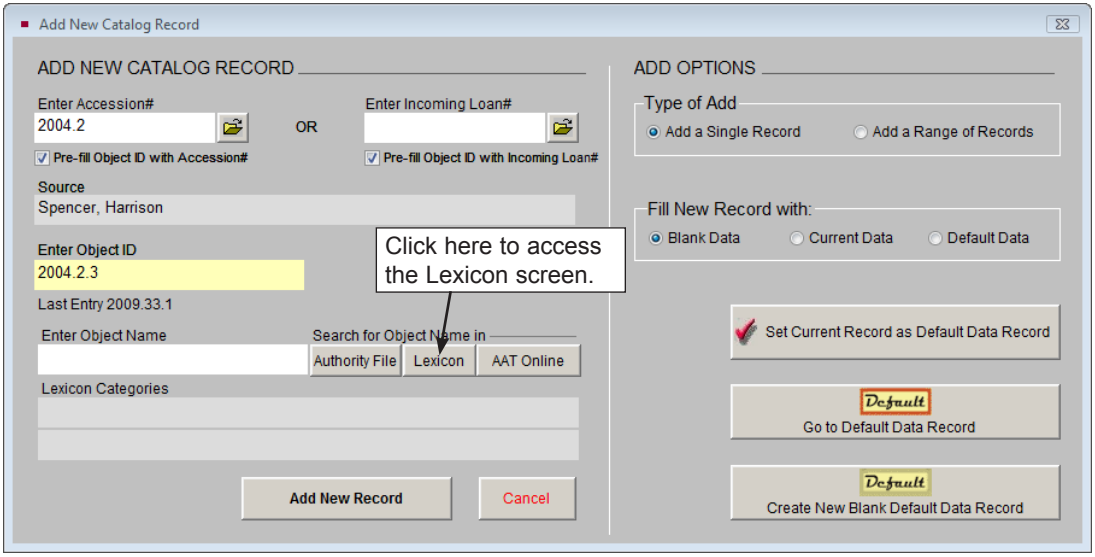


Figure 10-1 Add New Catalog Record screen

In the upper right corner of the screen you will see **Hierarchical Listing of Terms** and **Alphabetical Listing of Terms**. Select one of these two approaches for finding the object name.

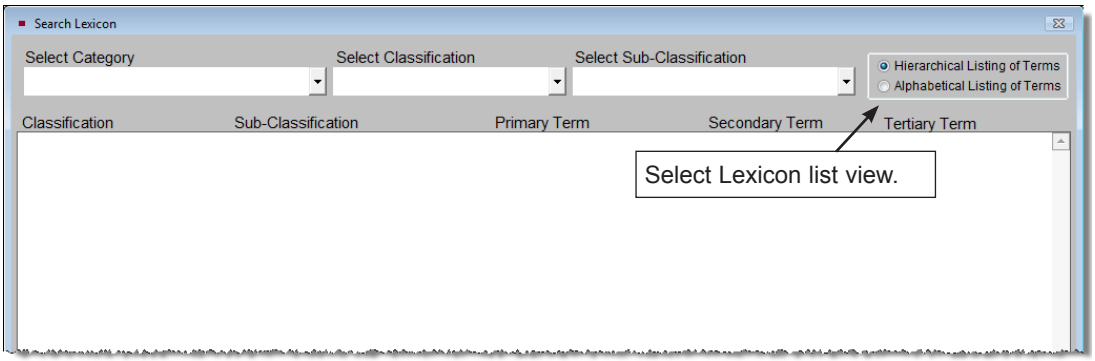


Figure 10-2 Search Lexicon screen

By using the **Hierarchical Listing of Terms**, you can start by looking at groupings of objects with similar functions then narrow your search. Use the drop-down menus for Category, Classification and/or Sub-Classification. In the example of the drawknife, you may want to start your search by selecting the "Woodworking T&E" from the Classification menu to see all the associated terms. Scroll through

the terms until you find the most appropriate object name. To select it, double click on the line that contains the most specific level of term. The most specific term is entered in the **Object Name** field at the bottom of the screen. Click on the **Select As Object Name** button to complete your selection and return to the Add New Catalog Record screen.

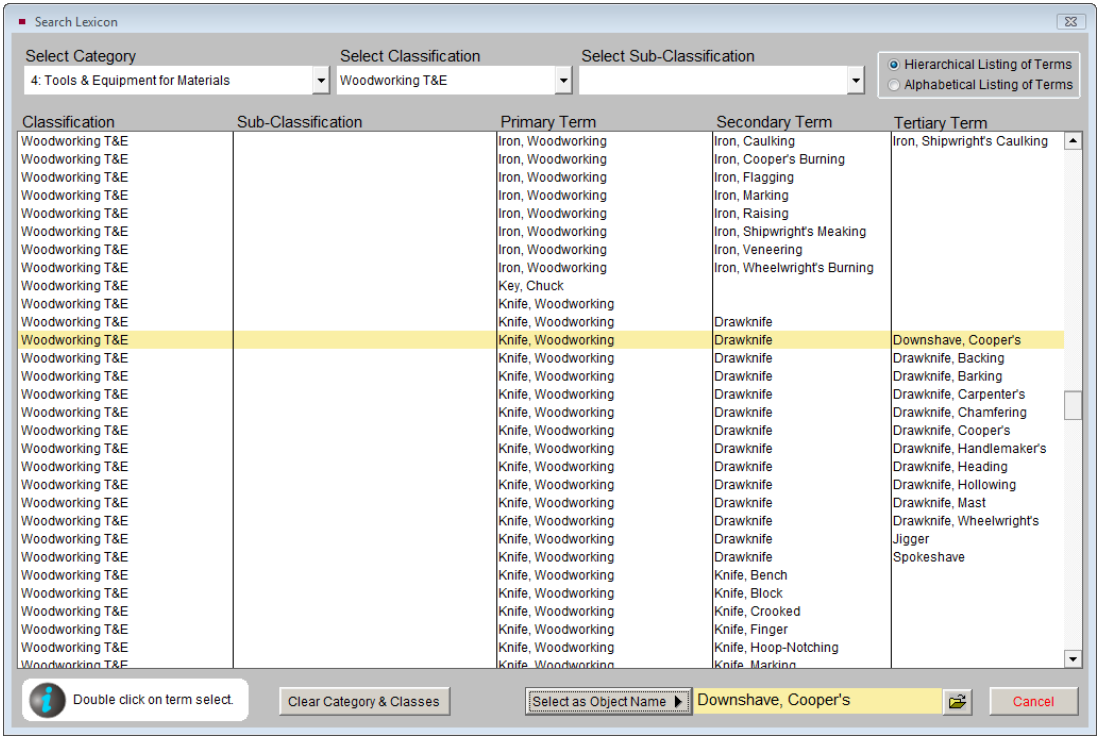


Figure 10-3 Hierarchical Listing of Terms

By choosing **Alphabetical Listing of Terms**, you will see a complete listing of all primary, secondary and tertiary terms on the left. Scroll through the list and double click on the term to select it. For ease in navigating the alphabetical list, click once on any term, then quickly type the first couple of letters of the term for which you are searching. The Category, Classification, Sub-Classification and more general object terms are provided on the right. Click **Select as Object Name** to return to the Add New Catalog Record screen.

Viewing the hierarchical classification system is helpful in choosing an object name when you do not have an exact term in mind. Placing the item in the context of like

objects may help you select the best name. If you know the object name, using the alphabetical listing is a quick way to locate and select it.

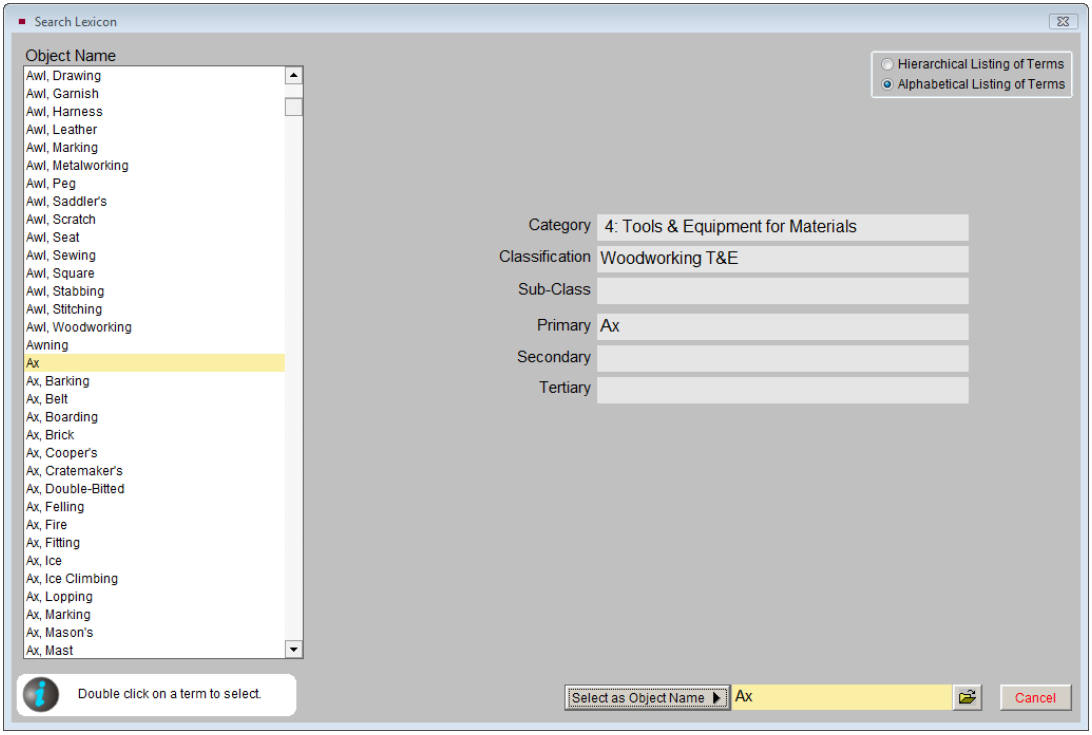


Figure 10-4 Alphabetical Listing of Terms

NOTE Object terms follow the format of a noun followed by an adjective descriptor. Sometimes one word is adequate to describe the item, but in many cases the adjective is needed to distinguish similar items. Rather than using the object name “Top hat,” the term is listed as “Hat, Top.” In this way a top hat is distinguished from a cowboy hat, and all hats are listed together alphabetically. When searching the Alphabetical Listing of Terms, you can see all hats at once and find the one that best matches the hat in your collection.

USING MULTIPLE OBJECT NAMES

On a catalog record, click the **Lexicon screen view** from the Sidebar to display this item’s Nomenclature classification. On this screen view, you can enter up to two additional object names to the catalog record. Using multiple object

names will enable you to cross index multipurpose or combination objects. An example of when you might use multiple object names for cross reference is an art vase. You would enter "Vase" in Object Name to classify it as a Horticultural Container |Household Accessories. Then enter "Artwork" in **Object Name 2** to classify it as Art. Depending on your organization's collection and purpose, you might first classify it as an Artwork then a Vase.

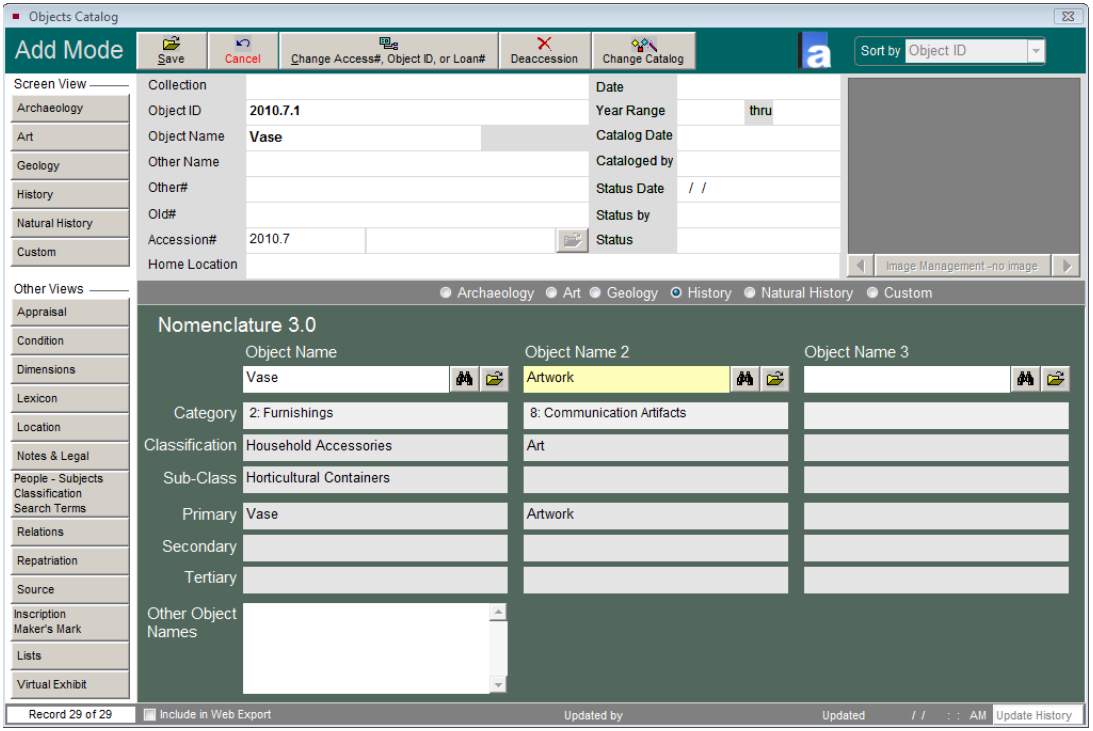


Figure 10-5 Lexicon Screen View - Multiple Object Names

A souvenir T-shirt is another good example of an object that would be cataloged with multiple names (taken from *Nomenclature 3.0*'s Introduction). To give multiple contexts to the object, you would use the Object Name "Souvenir" to classify it under Memorabilia| Documentary Artifacts and then enter "T-Shirt" in Object Name 2 to classify it under Main Garment | Clothing.

Nomenclature 3.0, unlike earlier editions of the Nomenclature, encourages cataloggers to use multiple object names for cross reference and add object terms for specialized collections. PastPerfect's Lexicon enables you to do both. The Introduction

to *Nomenclature 3.0* has full explanations for using this expanded classification system, including examples of multipurpose and combination objects.

TIP

Use the binoculars button while in Edit Mode to open the Search Lexicon screen to choose an new object name. Use the file folder icon button to access more information.

USING OTHER NAME FIELDS

If your organization uses regional or ethnic names for items, you can enter the primary "non-standard" name in the Other Name field near the top of the catalog screen and additional other names in the Other Object Names memo field at the bottom of the Lexicon screen view.

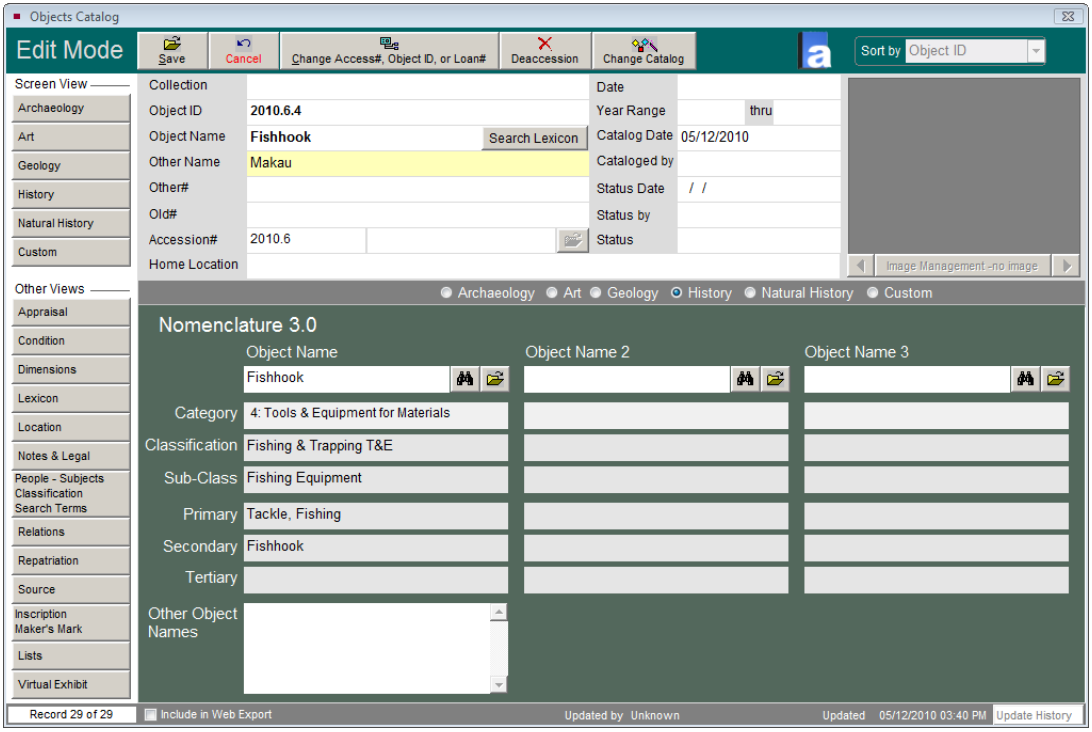


Figure 10-6 Lexicon Screen View with Object Name and Other Name

WORKING WITH THE SETUP LEXICON SCREEN

To access this screen, please click **Setup** from the Main Menu and choose **Lexicon** from the drop-down menu. The **Setup Lexicon** screen provides the ability to add new Lexicon categories, classifications and terms, as well as remove and reclassify terms. There is also an alphabetical list of illegal terms and their preferred term equivalents.

The **Setup Lexicon** screen displays a Category and its Classification, Sub-Classification, Primary, Secondary and Tertiary Terms. When the screen is first opened, Category 1: Built Environment Artifacts are shown as in Figure 10-7. To view the hierarchy for a different category, use the **Select Category** drop-down menu at the top of the screen. To the right of Select Category are two check boxes. The first check box controls the **Lexicon Alert** which appears when you add or edit a catalog record and try to use an object name that is not in the Lexicon. The other allows you to enter catalog records without an object name.

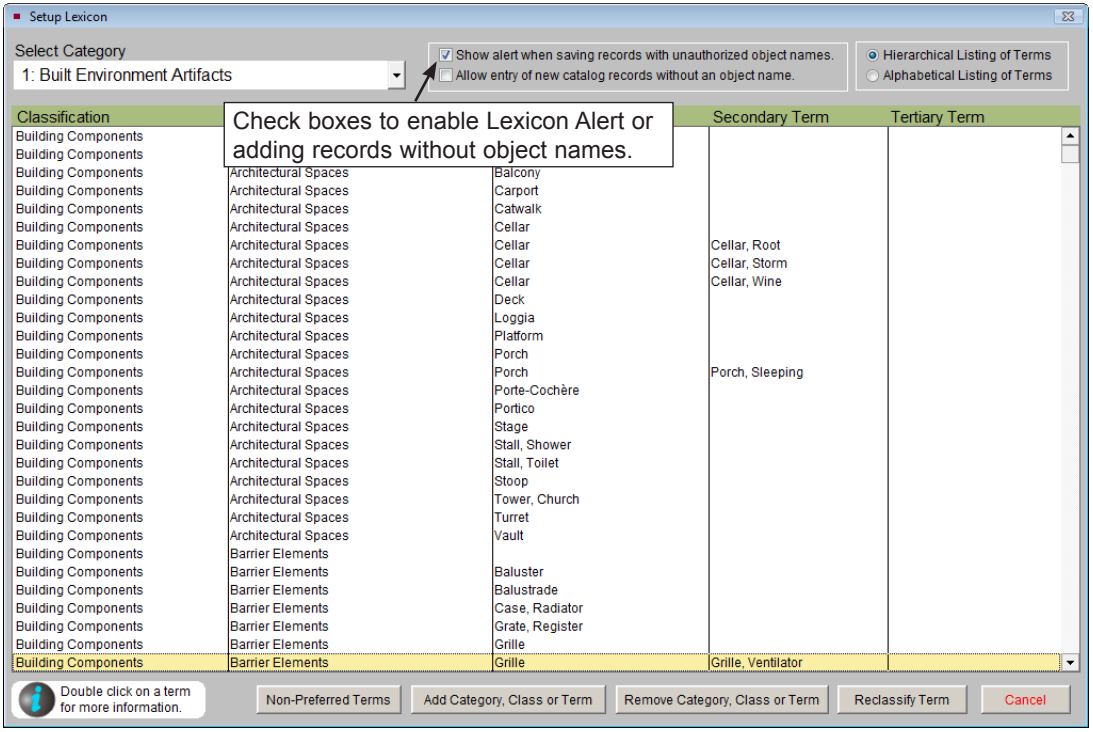


Figure 10-7 Setup Lexicon

The options to view the Lexicon as a **Hierarchical Listing** or **Alphabetical Listing of Terms** are at the upper right of the screen. The Lexicon navigation buttons appear at the bottom of the screen.

When using the **Hierarchical Listing of Terms**, you must first select a category. In the table below, its classification, sub-classification and terms are displayed. Each line in this view represents a different term and its associated classification levels. Some lines represent the classification level. Some lines represent the most specific term for that type of object. To view all the terms in the category, use the scroll bar at right, use the Page Up and Page Down keys on your keyboard, or click on a line, then use your mouse wheel to scroll through the terms.

When using the **Alphabetical Listing of Terms**, you can use some keyboard shortcuts to navigate the long list. First, click on an object name in the **Object Name** list and then start typing the name for which you are searching. You will be advanced to the name that most closely matches the letters. For example, typing "THIM" will take you to Thimble. You will need to type the letters relatively quickly to do this. If you type too slowly, when you type each letter it will take you to the first word beginning with that letter.

LEXICON INFORMATION

The **Setup Lexicon** screen provides definitions and additional information for categories, classifications, sub-classifications, and object terms from *Nomenclature 3.0*. Double click on the line for the classification, sub-classification or term for which you want information. The **Lexicon Information** screen appears with the Object Name, Source, Definitions & Notes, and Changes (from *The Revised Nomenclature*) on the left side. The Source may be *The Revised Nomenclature for*

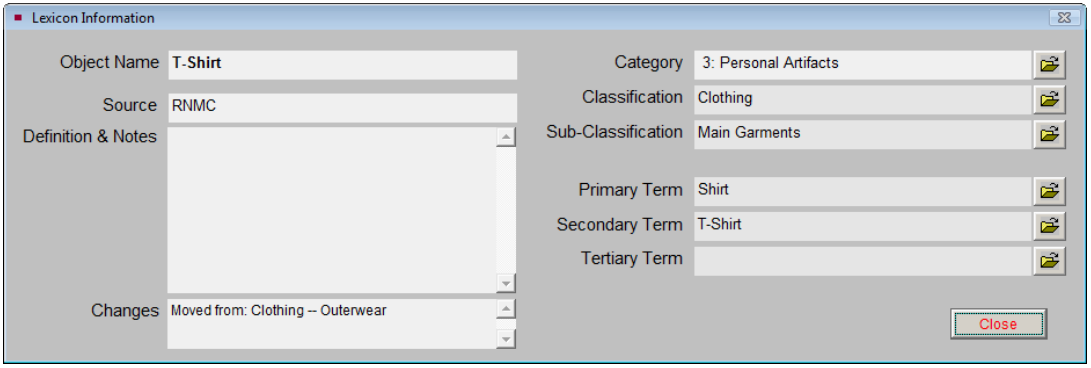


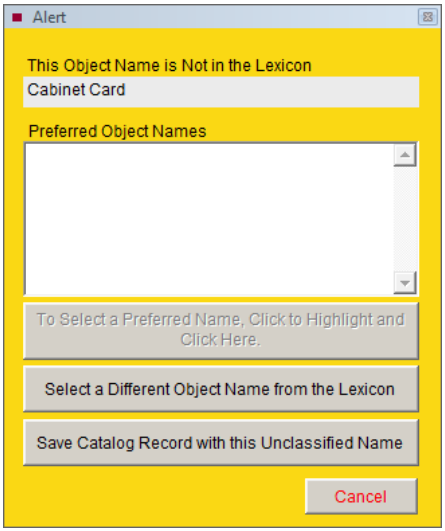
Figure 10-8 Lexicon Information

Museum Cataloging (RNMC) or a user, if you have added terms to the Lexicon. The Changes field usually contains notes on how the classification changed between *The Revised Nomenclature* and *Nomenclature 3.0*. The Category, Classification, Sub-Classification, and Terms levels appear on the right. Each classification level has a **file folder icon** button which provides more information about that level.

ILLEGAL OBJECT NAMES

PastPerfect comes pre-loaded with about 1500 illegal object names. These are names listed as non-preferred by *Nomenclature 3.0*. When a user enters a record with an object name that is not in the Lexicon, for example "Cabinet Card," PastPerfect will give the following alert:

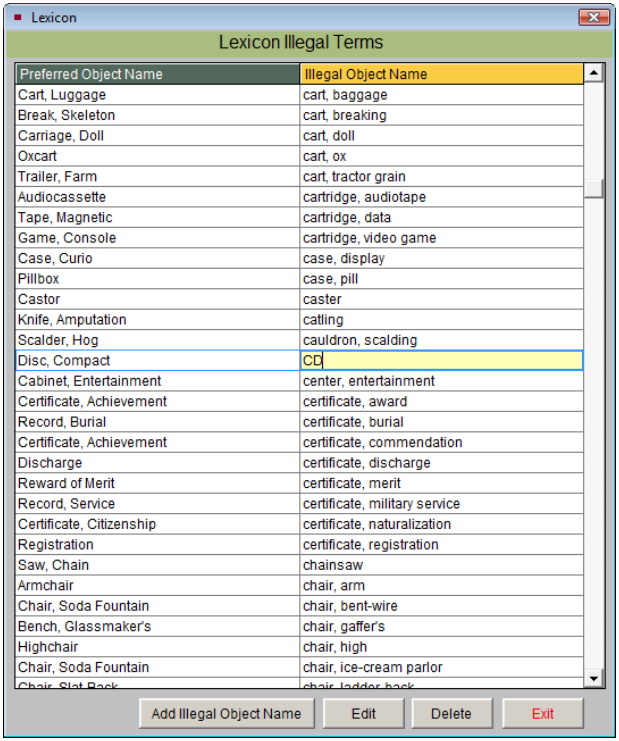
Figure 10-9
Lexicon Alert



If the object name entered matches one of the illegal object names, the preferred object name will be listed on this screen and should be selected. If the object name does not match an illegal object name, click the button **Select a Different Object Name from the Lexicon** to choose the appropriate name from the lexicon.

You can add to the **Lexicon Illegal Terms** list with commonly misused terms of your own. To add a new non-preferred name, on the Setup Lexicon screen, click the **Non-Preferred Terms** button. This will open the screen seen in Figure 10-10.

Figure 10-10
Lexicon Illegal Terms

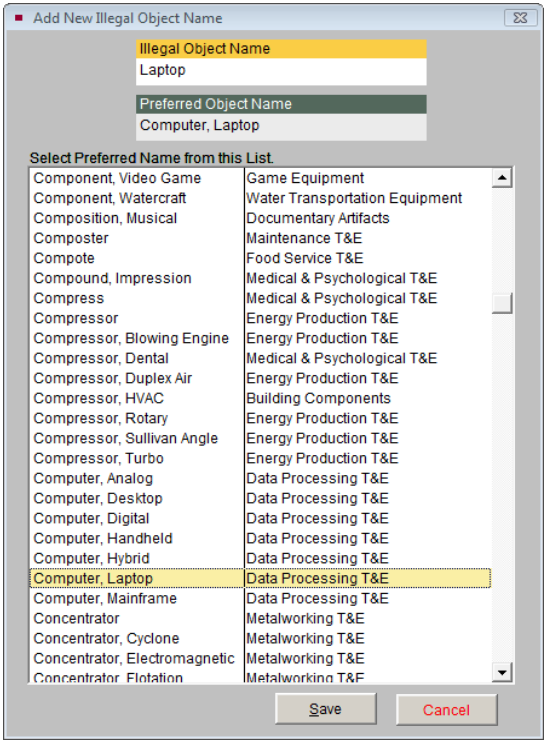


Notice that the Illegal Objects Name list is in alphabetical order, and the corresponding Preferred Object Name is in the left-hand column.

When you click on the **Add Illegal Object Name** button, the screen shown in Figure 10-11 appears. Type the illegal object name in the field at the top of the screen and choose a preferred object name from the list. The list shows the object name on the left and corresponding classification on the right. Click the **Save** button to add the new term.

You may also edit or delete terms from the Lexicon Illegal Terms list by clicking the **Edit** or **Delete** buttons at the bottom of the screen.

Figure 10-11
Add New Illegal Object Name



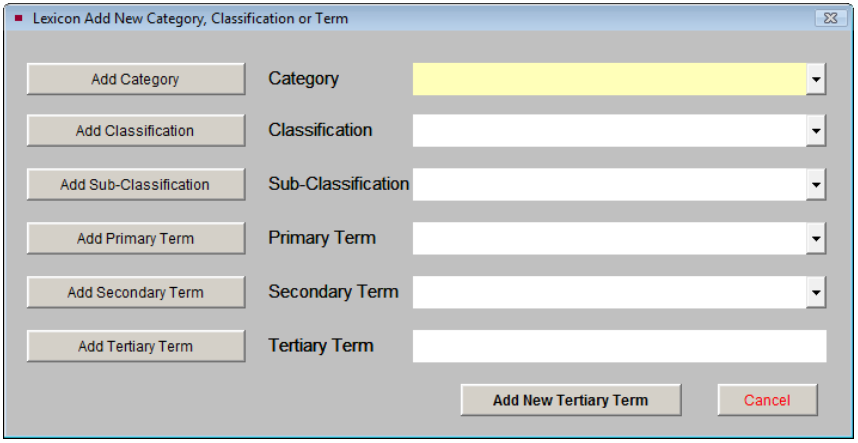
ADDING A CATEGORY, CLASSIFICATION OR TERM

Use the **Add Category, Class or Term** button at the bottom of the Setup Lexicon screen to add to any level of the hierarchy, as in Figure 10-12. If you want to add a specific term, for instance a tertiary term, you will need to put it within the framework of a Category, Classification, Sub-Classification (if applicable), Primary Term and Secondary Term. Click on **Add Tertiary Term**. Drop-down menus will appear for all levels except Tertiary Term. You will then be able to select the hierarchy for this new term and type in the tertiary term you want to add.

NOTE

If you are adding object names to the object name authority file, you should choose terms that are listed in the Lexicon. The object name authority files are not automatically populated with terms from the Lexicon. If you add terms to the object name authority file exactly as they are listed in the Lexicon, PastPerfect will fill the appropriate classification levels for you when you create your catalog record. Otherwise object names will belong to the Unclassifiable Artifacts category.

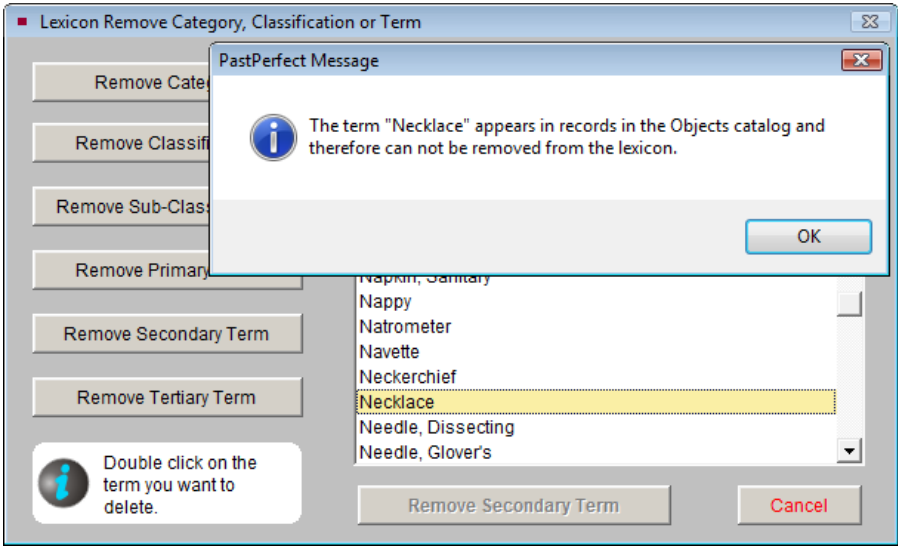
Figure 10-12
Lexicon Add New Category, Classification or Term



REMOVING A CATEGORY, CLASSIFICATION OR TERM

You can delete any level of the hierarchy by clicking the **Remove Category, Class or Term** button. Click the **Remove** button for the classification level where you want to make a deletion. A list of classifications or terms will appear. Double click on your selection to remove it from the Lexicon. Before deleting categories, classifications or more general terms, you must first delete all of their associated lower level terms. For instance, if you want to delete the Secondary Term "Necklace," you would first need to delete all of the more specific types of necklaces, the Tertiary terms. If a Primary, Secondary, or Tertiary term is being used as an Object Name on any records, you will not be able to delete the term.

Figure 10-13
Lexicon Remove New Category, Classification or Term



The deletion of a term is most often required when a cataloger has added a term not recognized by the Lexicon and has chosen to save the catalog record with the unclassified name. This will automatically assign the object name the Category "10: Unclassifiable Artifacts" and the Classification "Need to Classify." You should regularly review "Need to Classify" terms. To remove the term from "Need to Classify," you can edit the catalog record and choose a different term that is within the classification system. Or you can add the term to the Lexicon in the Setup Lexicon area using the Add Category, Class or Term button, then edit the catalog record and choose that new term you added.

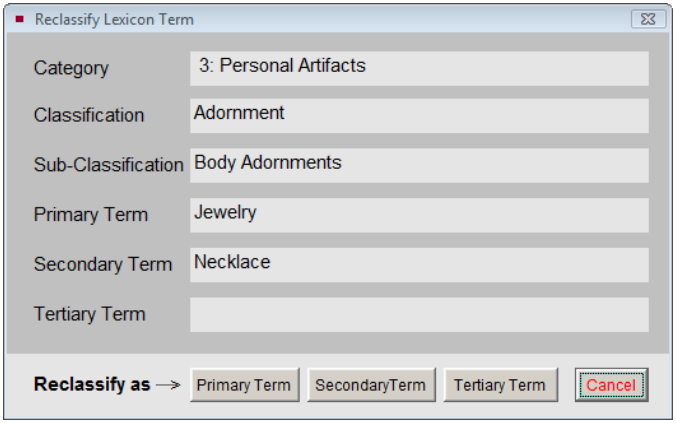
TIP

PastPerfect has added a classification that does not appear in *Nomenclature 3.0* - "Need to Classify." This Classification is listed under Category 10: Unclassifiable Artifacts. A list of object names that need to be classified may be printed by going to the Main Menu | Reports | Lexicon | Need to Classify.

RECLASSIFYING A TERM

If needed, terms can be moved from one Category, Classification and Sub-Classification to another by using the **Reclassify Term** function. This function is helpful if a new term was added under an incorrect Category or Classification. To reclassify a term, while viewing the Hierarchical List of Terms, select the term from the screen, then click the **Reclassify Term** button.

Figure 10-14 Reclassify Lexicon Term



On the Reclassify Lexicon Term screen, choose the level for the term you are reclassifying, either Primary, Secondary or Tertiary. Then select the new Category and Classification for the item. If a Sub-Classification is needed, choose that as well. If your term is a Secondary term, you must choose a Primary term. If your term is a Tertiary term, you must choose a Primary and Secondary term. Click **Save** to save your changes. All records that have this object name will display the newly assigned hierarchy.

RESOLVING UNCLASSIFIED OBJECT NAMES

In Setup Lexicon, the **View Unclassified Object Names** button enables you to see a list of Object Names from your catalog records that exist outside of the current Nomenclature. These Object Names are not recognized terms and have not been added to the classification system. This section enables you to either change the unclassified term to an Object Name from the Lexicon OR add the term to your Lexicon.

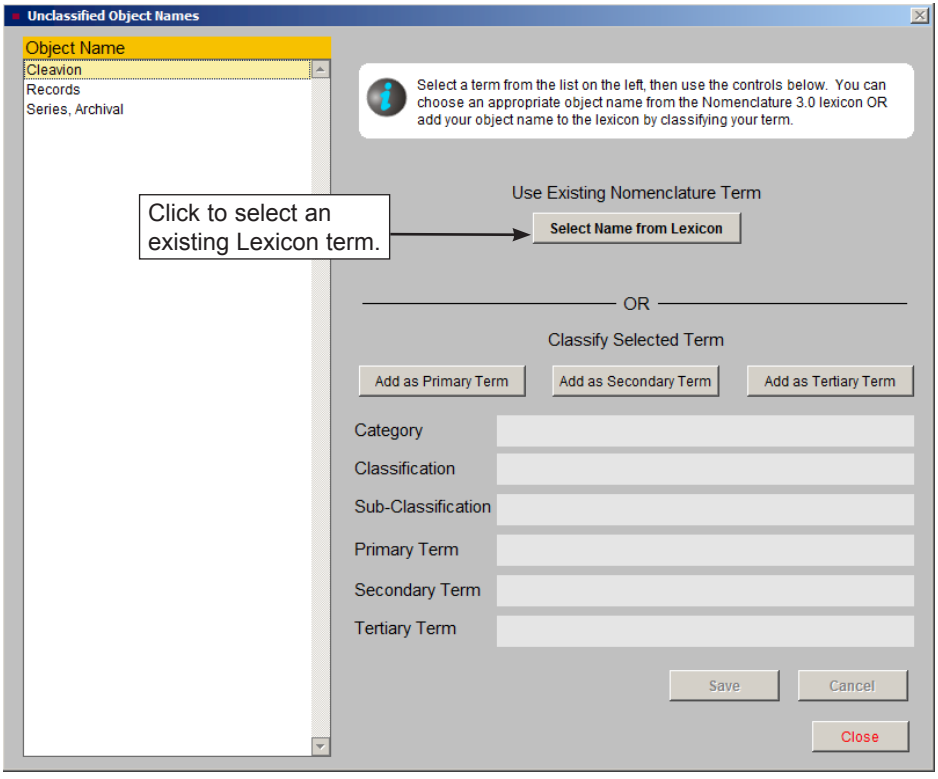


Figure 10-15 Unclassified Object Names

To change an unclassified name to a term in the *Nomenclature 3.0* lexicon, select the term in the list at the left, as seen in Figure 10-15. Then click the **Select Name from Lexicon** button. When using the Hierarchical Listing of Terms view, use the drop-down menus to select the Category, Classification, and Sub-Classification (if needed) to find the desired grouping. When you find your desired term, double click to select it, then click the **Select as Object Name** button. If using the Alphabetical Listing of Terms view, scroll through the list and double click on the term to select it. Once selected, click the **Select as Object Name** button. Please review the "Using the Lexicon" section in this chapter for tips on how to best find terms.

The **Unclassified Object Names** screen also allows you to add your object name to the lexicon by classifying your term. Just as if you were going to write in object names in the *Nomenclature 3.0* book, you can make changes to PastPerfect's built-in Lexicon. Please perform a thorough search of the Nomenclature before making additions.

It is also important to understand the three levels of terms before adding to the Nomenclature. The "Using the Lexicon" section of this chapter briefly reviews the structure. For a more detailed explanation of the hierarchy, please read the "Structure of Nomenclature 3.0" section in the *Nomenclature 3.0* book.

To add a term, click on the **Add** button that fits the specificity of the Object Name to classify. For more general terms, use the **Add Primary Term** button. For more specific terms, use either the **Secondary** or **Tertiary Term** button. Remember, to be a tertiary level term, the Lexicon must have an appropriate Primary and Secondary level term. Use the drop-down menus to place the term into an existing Category, Classification, Sub-Classification (if applicable), and higher level terms. Click the **Save** button.

NATURAL HISTORY

Since PastPerfect's Objects catalog has a component for cataloging natural history items, we have added an eleventh category, Natural History. This category has four associated classifications: Biology, Botany, Geology, and Paleontology. By using the **Select Category** drop-down menu and choosing "Natural History," you

can access the four classifications and their associated primary terms. These primary terms will be the object names for the records.

PastPerfect does not provide every possible species name in the Natural History Lexicon, because it is expected that most natural history collections are of a limited nature. For example, you may have a collection of plant specimens. In that case, you would want to add the species names for the plants in your collection as primary terms to the category "Natural History" and classification "Botany."

If you would like your collection's species list imported into this portion of the Lexicon, please contact our conversions department toll free at 1-800-562-6080 or by email using conversions@museumsoftware.com.

USING NOMENCLATURE 2.0

While we recommend using *Nomenclature 3.0*, it is possible to change the Lexicon to *The Revised Nomenclature for Museum Cataloging* (Nomenclature 2.0). You may want to use Nomenclature 2.0 if you have made significant changes to the Lexicon in PastPerfect 4.0 (or earlier PastPerfect versions). To change the Lexicon, go to the Main Menu, then use the Setup drop-down menu. Select **System Parameters** and change the **Lexicon Nomenclature** to "2.0." After making this change, it is required that you reindex your data, including Rebuild Catalogs, and then Rebuild your Lexicon, before working with the catalog records.

Once the Lexicon is set to Nomenclature 2.0, you can change it to 3.0 by going to **System Parameters** in the Setup drop-down menu and changing the **Lexicon Nomenclature** to "3.0." You will be required to reindex. Please note that we recommend choosing a Nomenclature version and staying with it. Object names added while using Nomenclature 3.0 may become "Unclassifiable Artifacts" in 2.0.