

Conservation: Treatment process

Summary

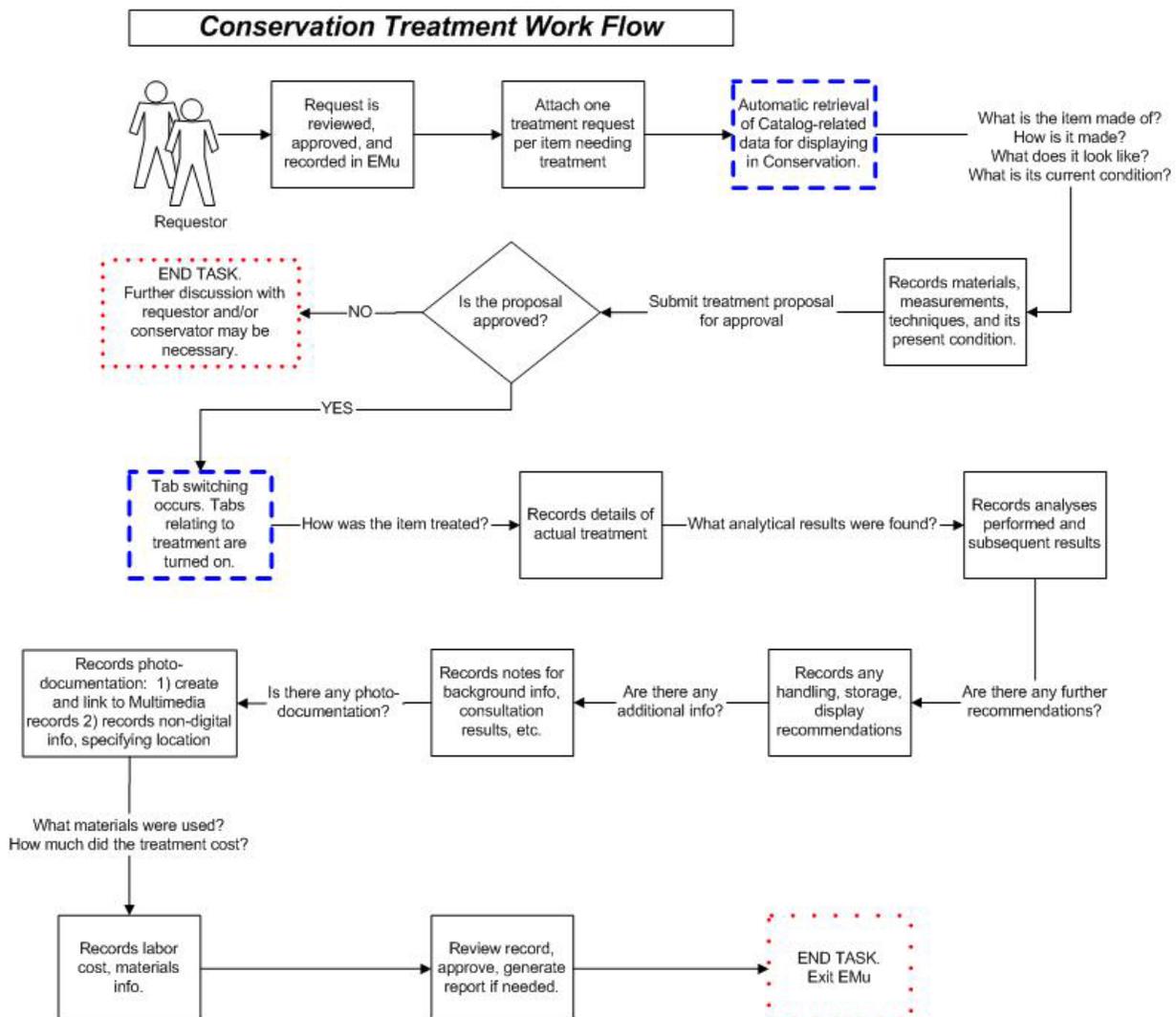
In August 2005, a group of conservators, project managers, IT professionals, gathered to discuss the possibility of developing a set of core requirements for the revision of the Conservation module in KE EMu. Participants came from the Field Museum, National Museum of the American Indian, National Museum of Natural History, US Holocaust Memorial Museum, Winterthur Museum. The participants agreed on the following points:

- Focus on processes that are performed at every institution. Treatment is the starting point.
- The core requirements will only address the Treatment process. All other processes, i.e. survey, pest management, sampling, etc. are too institution-specific to develop a standardized work flow.
- Each institution will need to subclass Conservation to handle the institution-specific work flows outside of Treatment.

At the EMu Users Meeting in Chicago, October 2005, this group and other interested parties along with KE staff met to discuss further steps. A forum on Conservation was created on the emusers.org web site and lively discussions ensue.

A set of core requirements is ready for delivery to KE for further discussion. These requirements cover the treatment process; an activity performed by each conservation department.

Work flow for treatment



The users group proposes the following core tabs:

1. Request: Stores information relating to a submission for treatment of an item. This tab is used by those institutions whose work flow includes tracking of request and subsequent approval or disapproval to proceed.
2. Information: Stores information relating to the item undergoing treatment.
3. Description: Stores the material components, measurements, and detailed description of the item's construction.
4. Condition: Stores the current condition of the item.
5. Internal proposal: Stores information related to the treatment proposal. Used for internal requests by the institution.
6. External proposal: Stores information related to the treatment proposal including additional data relating to cost. Used for external requests by those institutions who perform treatment work for other museums, companies, etc.
7. Treatment: Stores detailed information related to the actual treatment.
8. Analyses: Stores any analytical processes conducted as part of the treatment of the item and related bibliographic references.
9. Multimedia: Standard Multimedia tab.
10. Non-digital media: Stores any other type of non-digital photo-documentation relating to this treatment, i.e. film, print, slide, that are on file.
11. Recommendations: Stores recommendations relating to handling, display, storage, etc. for the item as related to its use at the time, i.e. for an exhibit.
12. Notes: Stores any other comments and related bibliographic references to the item.
13. Accounting: Stores information relating to the final costs, materials used in the treatment.
14. Tasks: Standard Tasks tab
15. Admin: Standard Admin tab

In addition to the standard EMu functionalities in the Conservation module, NMAI will require the following functionalities:

1. Retrieval of specific Catalog information for read-only display in Conservation.
2. Tab switching based on an Approved flag.
3. Calculation of total labor cost, total material cost, and a total treatment cost based on labor and material.
4. Auto-generation of additional treatment records for each item if the same treatment is performed on a group of items.

1. **Request tab**

STATUS: NOT DONE

Stores information relating to a submission for treatment of an item. This tab is used by those institutions whose work flow includes tracking of request and subsequent approval or disapproval to proceed.

Core Conservation Module -- 1.0.4b

File Edit Select View Tools Tabs Multimedia Window Help

Summary Info 1

Conservation Number
Number:

Request status
Status:

Request Details

Requested by:

Date requested: Expected completion date:

Actual completion date: Completion notification date:

People to notify: *

Request Information

Associated event:

Associated loan:

Other Reason:

Request Information Description Condition IntProposal Analyses Notes ExtProposal Treatment Recommendation

Insert Record 1 of 1

Functionality

- **Conservation Number:** Text field.
- **Request Status:** Text field, controlled by lookup list.
- **Requested By:** Linked field to Parties.
- **Date Requested:** Date field.
- **Expected Completion Date:** Date field.
- **Actual Completion Date:** Date field.
- **Completion Notification Date:** Date field.
- **People to notify:** multi-value, linked field to Parties.
- **Associated event:** Linked field to Events.
- **Associated loan:** Linked field to Loans.
- **Other reason:** Text field, controlled by lookup list.

2. Information tab

STATUS: NOT DONE

This tab records the basic information about an item requiring treatment.

The screenshot displays the 'Core Conservation Module -- 1.0.4b' application window. The 'Information' tab is active, showing a form for entering item details. The form is organized into two main sections: 'Catalog Info' and 'Record Info'. The 'Catalog Info' section includes fields for Object, Accession Year, Accession Num, Catalog Num, Country, District, Site, Ethnic Grp, Location, and Barcode. The 'Record Info' section includes fields for Record Type, Record Date, Conservators, Record Status, Assoc. Event, Assoc. Loan, and Other Reason. At the bottom of the window, a tabbed interface shows 'Request', 'Information', 'Description', 'Condition', 'MultiMedia', 'Non-Digital Media', 'Notes', 'Analyses', 'IntProposal', and 'ExtProposiz'. The status bar at the bottom indicates 'Insert' and 'Record 1 of 1'.

Functionality

- **Object:** Linked field to Catalog.
- **Catalog info:** Local fields from Catalog, read-only. Will require customization on a per-institution basis. Examples shown here are Accession Year; Country; Ethnic Grp; Accession Num; District; Location; Catalog Num; Site ; Barcode:
- **Record type:** Linked field, controlled by lookup list. The type of Conservation Record. The intention is that this field can be used for tab switching. For example, Record type = Pest Management can turn on Pest Management related tabs.
- **Record date:** Date field.
- **Conservators:** Multi-value, linked field to Parties.
- **Record status:** Text field, controlled by lookup list.
- **Associated event:** Linked field to Events.
- **Associated loan:** Linked field to Loans.
- **Other reason:** Text field, controlled by lookup list.

3. Description tab

STATUS: NOT DONE

Stores descriptive information for the item, i.e. materials, techniques, etc.

The screenshot shows the 'Core Conservation Module -- 1.0.4b' application window. The 'Description' tab is selected in the bottom navigation bar. The interface includes a menu bar (File, Edit, Select, View, Tools, Tabs, Multimedia, Window, Help), a toolbar with various icons, and a 'Summary Info' section. The 'Materials' section contains a list with one entry marked with an asterisk. The 'Dimensions' section is a linked grid with columns for Part, Kind, Value, Unit, and Comment, also containing one entry marked with an asterisk. The 'Description' section is a large text area. The bottom status bar shows 'Record 1 of 1'.

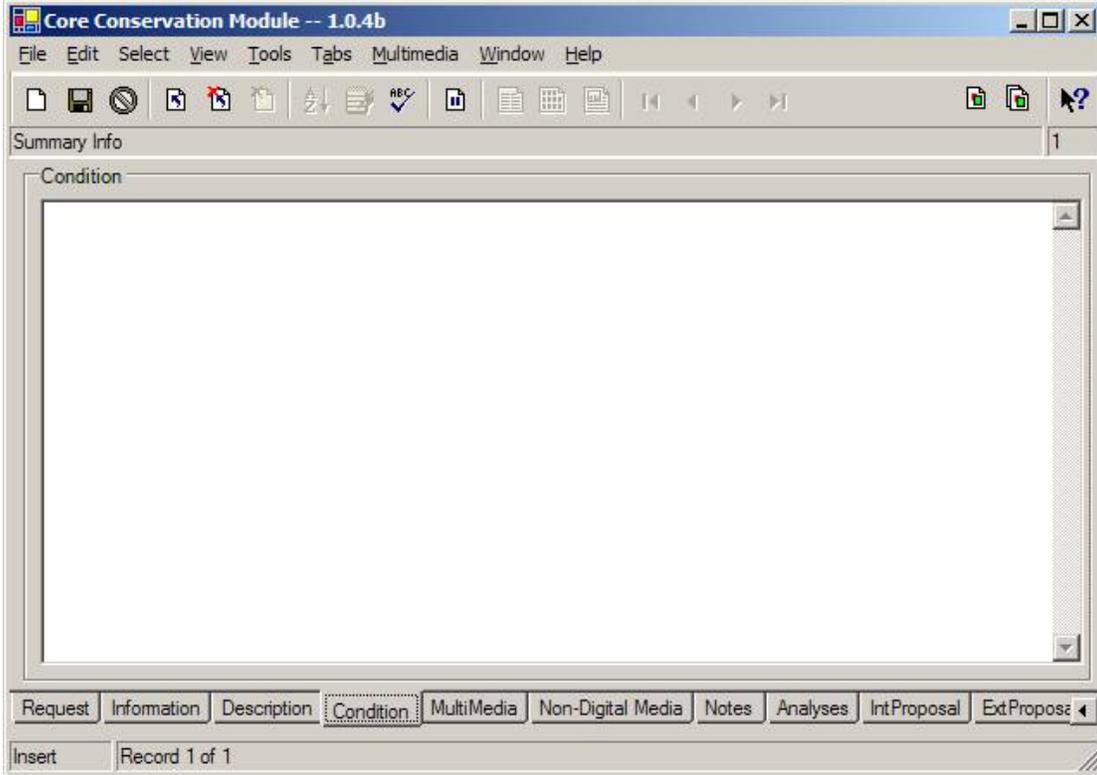
Functionality

- **Materials:** Multi-value, text, controlled by lookup list. *Note: this may be a field that can push data back into the Catalog with the assumption that a matching field exists in Catalog.*
- **Dimensions:** Multi-value linked grid. Group for storing all measurements related to the item. *Note: these fields may contain data that need to be pushed back into the Catalog with the assumption that matching fields exist in Catalog.*
 - **Part:** Text field. The part of the item being measured.
 - **Kind:** Text field, controlled by lookup list. The type of measurement recorded, i.e. Height, Length, etc.
 - **Value:** Floating decimal. The actual value of the measurement taken.
 - **Unit:** Text field, controlled by lookup list. The unit for the measurement, i.e. cm, m, ft, in, etc.
 - **Comment:** Text field. Stores additional info for the measurement, i.e. approximate, taken without final, etc.
- **Description:** memo field. Stores textual descriptive info of the item.

4. Condition tab

STATUS: DONE

This tab records the current condition of the item.



Functionality

- **Condition:** Memo field.

5. Internal Proposal tab

STATUS: NOT DONE

Contains information relating to the proposed treatment when generated internally.

Core Conservation Module -- 1.0.4b

File Edit Select View Tools Tabs Multimedia Window Help

Summary Info 1

Proposal

Context:

Action:

Proposed By: * Estimated Hours:

Proposal Date:

Authorization

Name: Approved?:

Comment: Date:

Name	Approved?	Comment	Date
*			

Information Description Condition MultiMedia Non-Digital Media Notes Analyses IntProposal ExtProposal Treatment

Insert Record 1 of 1

Functionality

- **Context:** Text field controlled by lookup list.
- **Action:** Memo field with description of proposed treatment.
- **Proposed By:** Multi-value, linked field to Parties. Contains names of individuals who propose the treatment; may not be the same as those who perform the treatment.
- **Estimated Hours:** Floating decimal field (to one decimal place). Stores an approximate duration for treatment process.
- **Proposal Date:** Date field. The date when the proposal was made.
- **Authorization:** Multi-value linked grid. Group for storing individuals who approve or disapprove of the proposal. Data entry is done at the top with a linked grid displaying all authorizations below.
 - **Name:** Linked field to Parties. Name of individual who has authority over the proposal.
 - **Approved?:** Text field, controlled by lookup list. Default values = Yes, No. Value here will be used for tab switching, displaying Treatment-related tabs. *Note: Need to decide what tabs are Treatment-related besides Treatment and Accounting.*
 - **Comment:** Text field. Stores additional comment regarding the decision.
 - **Date:** Date field. Date of decision.

6. External Proposal tab

STATUS: NOT DONE

Contains information relating to the proposed treatment when generated externally. This tab will probably be turned off for those institutions who do not perform conservation work for outside organizations.

Functionality

- **Proposal:** Linked-grid. Use to store all tasks needed for the treatment.
 - **Task:** Text field. A brief description of the task.
 - **Conservator:** linked field to Parties. *Note: What happens if there is more than one conservator?*
 - **Hours:** Floating decimal (to one place).
 - **Rate:** Currency field (to two decimal places).
 - **Subtotal:** Calculated field, generated by multiplying Hours x Rate.
- **Material:** Multi-value text field, controlled by lookup list.
- **Manufacturer:** Linked field to Parties.
- **Supplier:** Linked field to Parties.
- **Qty:** Integer field.
- **Unit:** Text field, controlled by lookup list.
- **Unit Cost:** Currency field (to two decimal places).
- **Subtotal:** Calculated field, generated by multiplying Qty x Unit Cost.
- **Proposed By:** Multi-value field, linked field to Parties.
- **Proposal Date:** Date field. The date when the proposal was made.
- **Labor cost:** Calculated field, read-only. Sum of all Subtotal for tasks.
- **Material cost:** Calculated field, read-only. Sum of all Subtotal for Materials.
- **Total cost:** Calculated field, read-only. Sum of Labor Cost + Material Cost.
- **Authorization:** Multi-value linked grid. Group for storing individuals who approve or disapprove of the proposal. Data entry is done at the top with a linked grid displaying all authorizations below.
 - **Name:** Linked field to Parties. Name of individual who has authority over the proposal.
 - **Approved?:** Text field, controlled by lookup list. Default values = Yes, No. Value here will be used for tab switching, displaying Treatment-related tabs. *Note: Need to decide what tabs are Treatment-related besides Treatment and Accounting.*
 - **Comment:** Text field. Stores additional comment regarding the decision.
 - **Date:** Date field. Date of decision.

7. Treatment tab

STATUS: NOT DONE

Stores the treatment process. Some institutions will record information as the treatment occurs; some will record after treatment has ended. Some include post-treatment condition, i.e. the crack has been repaired and is no longer visible, in this section.

The screenshot shows the 'Core Conservation Module -- 1.0.4b' application window. The menu bar includes File, Edit, Select, View, Tools, Tabs, Multimedia, Window, and Help. The toolbar contains various icons for file operations and navigation. The main window is titled 'Summary Info' and contains a 'Treatment' section with a large empty text area. Below the text area are input fields for 'Start Date', 'Finish Date', and 'Actual Hours'. To the right of these fields is a 'Treated By:' field with a multi-value selection icon (an asterisk in a box) and a search icon. At the bottom, there is a tabbed interface with buttons for 'Description', 'Condition', 'MultiMedia', 'Non-Digital Media', 'Notes', 'Analyses', 'IntProposal', 'ExtProposal', 'Treatment' (which is currently selected), and 'Recomr'. The status bar at the bottom left shows 'Insert' and 'Record 1 of 1'.

Functionality

- **Treatment:** Memo field.
- **Start Date:** Date field.
- **Finish Date:** Date field
- **Actual Hours:** Floating decimal field (up to two decimal places)
- **Treated By:** multi-value, linked field to Parties.

8. Analyses tab

STATUS: NOT DONE

This tab records any analytical data as part of the treatment.

Core Conservation Module -- 1.0.4b

File Edit Select View Tools Tabs Multimedia Window Help

Summary Info 1

Analysis details

Test for: Method:

Result:

Tested by: MM ref:

Date: Biblio ref:

Analyses List

	Test For	Method	Result	Tested By	Date
*					

Request Information Description Condition IntProposal **Analyses** Notes ExtProposal Treatment Recommendation

Insert Record 1 of 1

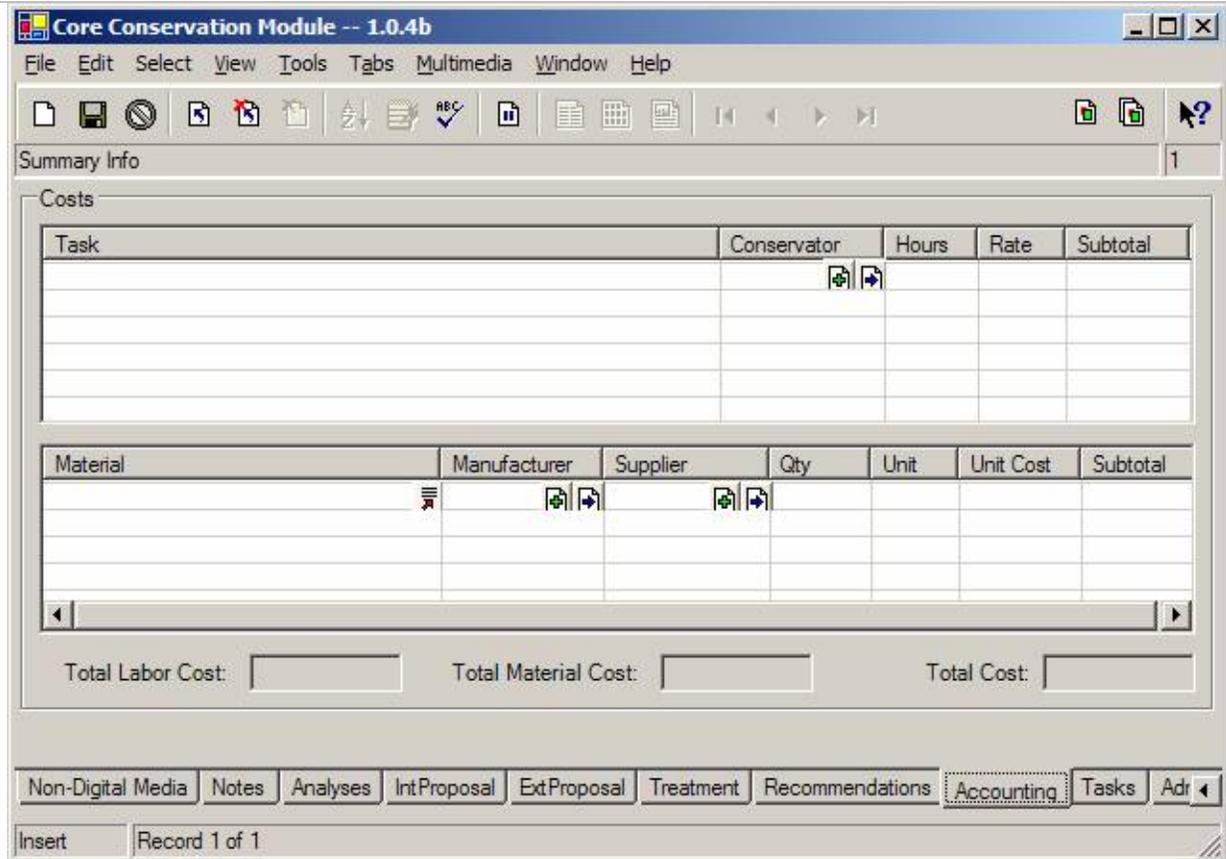
Functionality

- **Analysis details:** Linked grid for storing all analyses conducted on the item as part of this treatment. Date entry is done above; list of analyses is displayed below.
 - **Test For:** Text field, controlled by lookup list.
 - **Method:** Text field, controlled by lookup list.
 - **Result:** Text field.
 - **Tested By:** linked field to Parties.
 - **Date:** Date field.
 - **Biblio ref:** linked field to Bibliography.
 - **MM ref:** linked field to Multimedia.

9. Accounting tab

STATUS: NOT DONE

This tab records the material & labor cost after the treatment has completed. Some institutions will not use the labor group, which will mostly be used by institutions who perform work for external organizations.



Functionality

- **Summary Info:** linked-grid. Use to store all tasks used in the treatment.
 - **Task:** Text field. A brief description of the task.
 - **Conservator:** linked field to Parties.
 - **Hours:** Floating decimal (to one place).
 - **Rate:** Currency field (to two decimal places).
 - **Subtotal:** Calculated field, generated by multiplying Hours x Rate.
- **Material:** Multi-value text field, controlled by lookup list.
- **Manufacturer:** Linked field to Parties.
- **Supplier:** Linked field to Parties.
- **Qty:** Integer field.
- **Unit:** Text field, controlled by lookup list.
- **Unit Cost:** Currency field (to two decimal places).
- **Subtotal:** Calculated field, generated by multiplying Qty x Unit Cost.
- **Total Labor cost:** Calculated field, read-only. Sum of all Subtotal for tasks.
- **Total Material cost:** Calculated field, read-only. Sum of all Subtotal for Materials.
- **Total cost:** Calculated field, read-only. Sum of Labor Cost + Material Cost.

10. Recommendations tab

STATUS: NOT DONE

This tab records any recommendations, handling, storage, etc. for the item in the context of its current use.

The screenshot shows a software window titled "Core Conservation Module -- 1.0.4b". The menu bar includes File, Edit, Select, View, Tools, Tabs, Multimedia, Window, and Help. The toolbar contains various icons for file operations and editing. Below the toolbar is a "Summary Info" section with a tab labeled "1". The main area is divided into four text input fields: "Environmental Limits:", "Handling requirements:", "Mounting Requirements:", and "Storage Requirements:". At the bottom, there is a tabbed interface with buttons for "Condition", "MultiMedia", "Non-Digital Media", "Notes", "Analyses", "IntProposal", "ExtProposal", "Treatment", and "Recommendations" (which is currently selected). Below the tabs, there is an "Insert" button and a status indicator "Record 1 of 1".

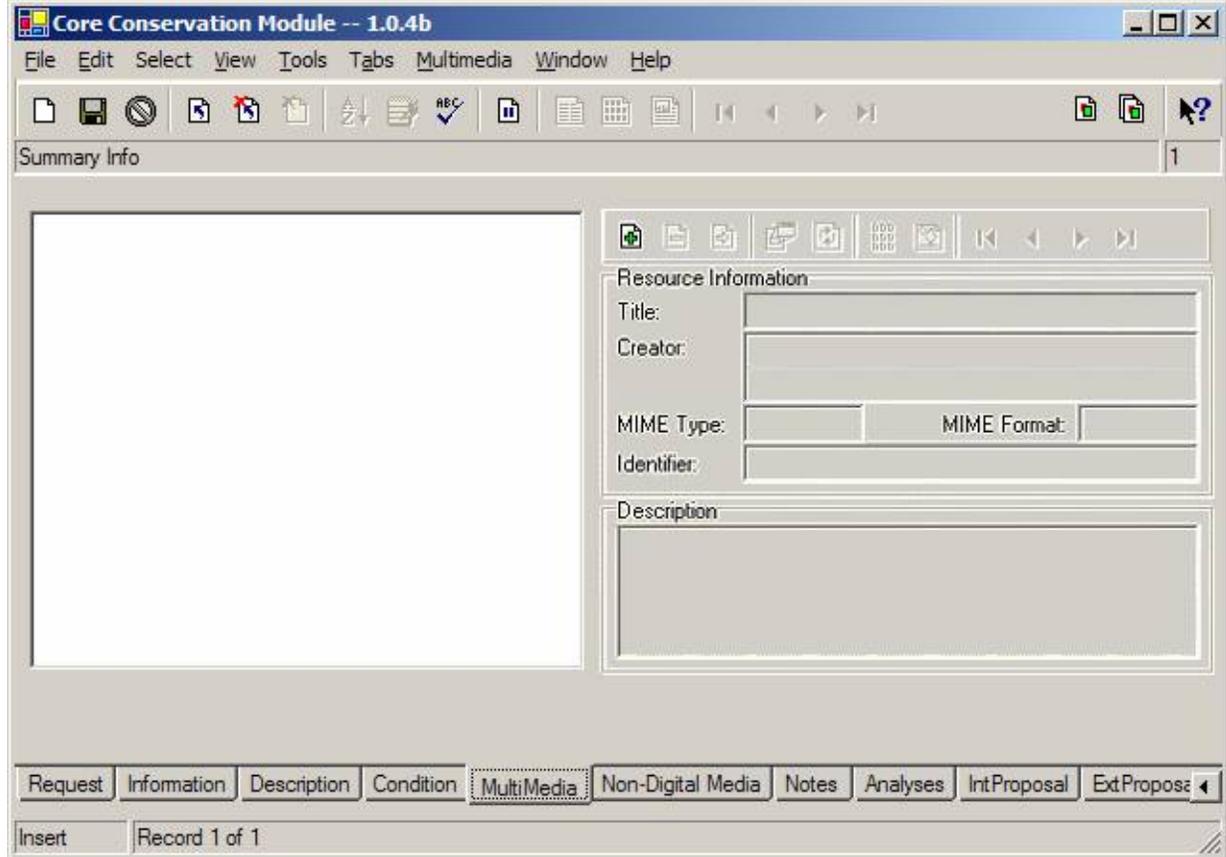
Functionality

- **Environmental limits:** Text field.
- **Handling requirements:** Text field.
- **Mounting requirements:** Text field.
- **Storage requirements:** Text field.

11. Multimedia tab

STATUS: DONE

This tab shows all attached multimedia assets.



Functionality

This is the standard Multimedia tab from the Conservation module. No modification is needed.

12. Non-Digital Media tab

STATUS: NOT DONE

This tab records non-digital multimedia assets.

Core Conservation Module -- 1.0.4b

File Edit Select View Tools Tabs Multimedia Window Help

Summary Info 1

Non-digital media details

Kind: Department:

Description:

Locator: Date:

By:

Non-digital media list

	Kind	Description	Locator	Date	By
*					

Request Information Description Condition MultiMedia **Non-Digital Media** Notes Analyses IntProposal ExtProposal

Insert Record 1 of 1

Functionality

- **Non-digital media details:** Linked grid.
 - **Kind:** Text field, controlled by lookup list. Stores the type of non-digital media, i.e. print, transparency, etc.
 - **Department:** Text field, controlled by lookup list.
 - **Description:** Text field. A brief description of the image subject, i.e. detail shot of left handle. May contain other technical info, i.e. light source, f-stop, etc. Details are up to the institution.
 - **Locator:** Text field, asset locator. Might be controlled by a regular expression, but not by a lookup list.
 - **Date:** Date field. The date the image was produced.
 - **By:** Linked field to Parties. The person who produced the image.

13. Notes tab

STATUS: NOT DONE

This tab stores additional notes regarding the treatment.

Note	Date	Kind
*		

Functionality

- **Note Details:** double-nested grid. Data entry on top; grid for display below.
 - **Note:** memo field.
 - **Date:** date field.
 - **Kind:** text field, controlled by lookup list.
- **References Details:** double-nested grid. Data entry on top; grid for display below.
 - **Attributed to:** multi-value, linked field to Parties. Each note may have multiple contributors.
 - **Bibliographic reference:** multi-value, linked field to Bibliography. Each note may have multiple bibliographic references.

14. Tasks tab

STATUS: DONE

This stores any tasks that require notification to others.

Core Conservation Module -- 1.0.4b

File Edit Select View Tools Tabs Multimedia Window Help

Summary Info 1

Task Information

Description: [Text Box]

Assigned to: * [Text Box]

Assigned by: [Text Box]

Result: [Text Box]

Commencement

Date: [Text Box] Notify on: [Text Box]

Notify: * [Text Box]

Completion

Completed: Yes No Hours taken: [Text Box]

Date: [Text Box] Notify on: [Text Box]

Notify: * [Text Box]

Tasks

Description	Date	Date	Completed
*			

Non-Digital Media Notes Analyses IntProposal ExtProposal Treatment Recommendations Accounting Tasks Adr

Insert Record 1 of 1

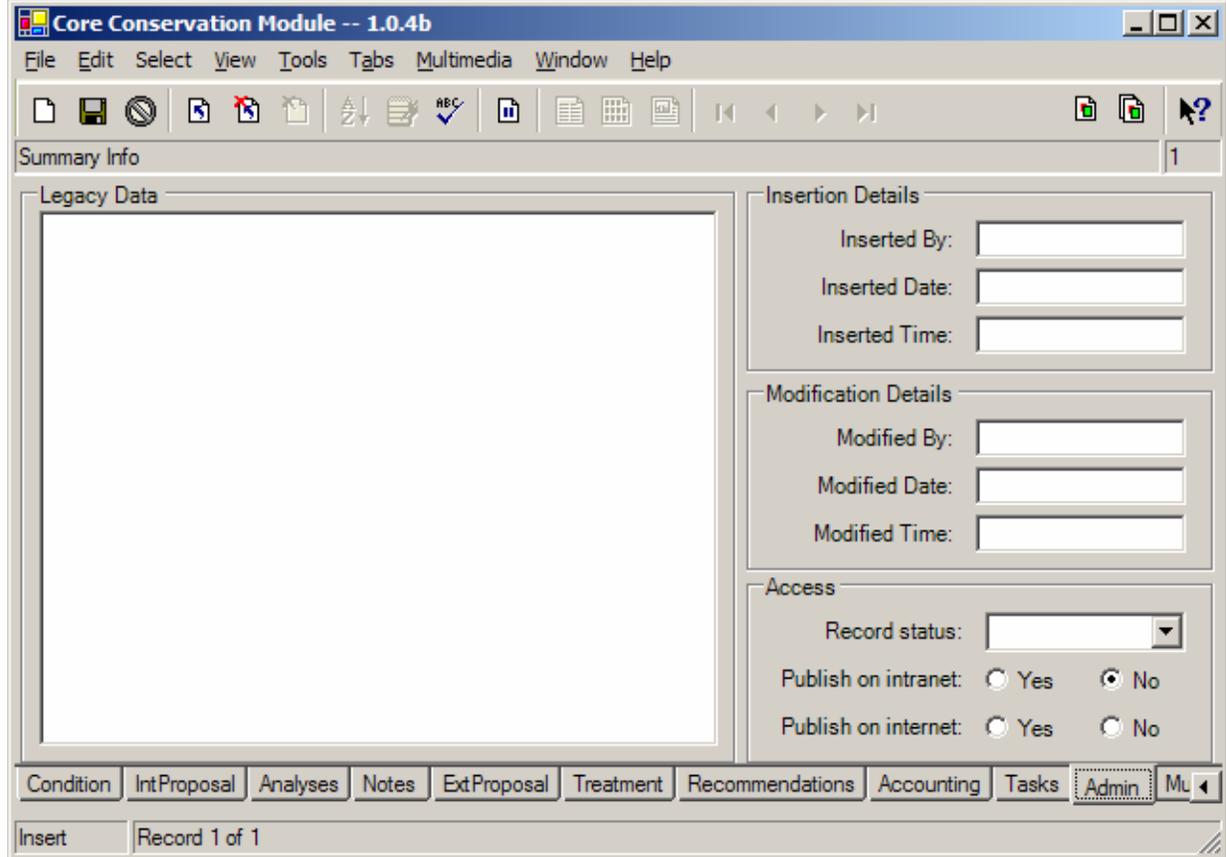
Functionality

Standard Tasks tab in Conservation module.

15. Admin tab

STATUS: DONE

This tab records all system generated information for insertion and modification status.



Functionality

This is the standard Admin tab from the Conservation module. No modification is needed.

16. Special functionalites	STATUS: NOT DONE. Desirable.
Auto-generation of additional treatment records for each item if the same treatment is performed on a group of items.	
<u>Functionality</u> <ul style="list-style-type: none">• Manually complete a treatment record.• Select a function to set this record as a template.• Points to a group of Catalog records.• System automatically generates the treatment records and duplicates every field with data.	