Describing and Preserving Documents in a Museum's Archive: a Multidisciplinary Approach to Integration, Digitization and Availability of Electronic Records in the National Museum of Ancient Art (Lisbon, Portugal)

Andreia **NOVO**

Bolseira de Investigação, Instituto de História da Arte da Universidade Nova de Lisboa (IHA-UNL), Av. Berna 26, 1069-061 Lisboa, Portugal
e-mail: andreia.novo@gmail.com

Ema **RAMALHEIRA ROCHA**

Bolseira de Investigação, Instituto de História da Arte da Universidade Nova de Lisboa (IHA-UNL), Av. Berna 26, 1069-061 Lisboa, Portugal
e-mail: emaramalheirarocha@gmail.com

Leonor **CALVÃO BORGES**

Arquivista, Divisão de Informação Legislativa e Parlamentar, Assembleia da República (DILP – AR), Av. D. Carlos I, nº 130 – 3º, 1200-651 Lisboa, Portugal
e-mail: Leonor.Borges@ar.parlamento.pt

Describing and Preserving Documents in a Museum's Archive: a Multidisciplinary Approach to Integration, Digitization and Availability of Electronic Records in the National Museum of Ancient Art (Lisbon, Portugal)

ABSTRACT

The work that we present is within the context of a research project funded by the Foundation for Science and Technology, developed by the Institute of Art History in partnership with the National Museum of Ancient Art. The archive of this museum institution is, in this article, the central object, given its unquestionable importance in the formation of Portuguese art museums. It is the whole process concerning description, indexing, digitization, digital preservation plan and availability to the public that we bring into consideration.

Descrizione e conservazione di documenti nell'archivio di un museo: un approccio multidisciplinare per l'integrazione, la digitalizzazione e la disponibilità di documenti elettronici nel Museo Nazionale di Arte Antica (Lisbona, Portogallo)

SINTESI

Il lavoro che si presenta si colloca nel contesto di un progetto di ricerca finanziato dalla Fondazione per la Scienza e la Tecnologia, sviluppato dall'Istituto di Storia dell'Arte in collaborazione con il Museo Nazionale di Arte Antica. L'archivio di questa istituzione museale costituisce l'oggetto centrale del presente articolo, data la sua innegabile importanza nella formazione dei musei d'arte portoghesi. Viene preso in considerazione l'intero processo riguardante il progetto di descrizione, indicizzazione, digitalizzazione, conservazione digitale e disponibilità per l'utenza.

Popisovanje in hramba dokumentov v muzejskem arhivu: multidisciplinaren pristop k integraciji, digitalizaciji in dostopnosti elektronskih dokumentov v Narodnem muzeju starih umetnosti v Lizboni

IZVLEČEK

Prispevek predstavlja delo, ki se izvaja v okviru raziskovalnega projekta, financiranega s strani Fundacije za znanost in tehnologijo, razvil pa ga je Inštitut za umetnostno zgodovino v sodelovanju z Narodnem muzeju starih umetnosti v Lizboni. Glede na svojo izjemno pomembnost v ustroju portugalskih umetnostnih muzejev predstavlja muzejski arhiv osrednjo temo tega članka. Predstavljen je tudi celoten potek v zvezi s popisovanjem, indeksiranjem, digitalizacijo, načrtom digitalne hrambe in dostopnostjo javnosti.

Descrever e preservar documentos no Arquivo de um Museu: uma abordagem multi-disciplinar à integração, digitalização e disponibilização de registos electrónicos no Museu de Arte Antiga (Lisboa, Portugal)

SUMÁRIO

O trabalho que vamos apresentar surge no contexto de um projecto de investigação financiado pela Fundação para a Ciência e Tecnologia, desenvolvido pelo Instituto de História de Arte em parceria com o Museu Nacional de Arte Antiga. O arquivo desta instituição museológica é, neste artigo, o objecto central, dada a sua inquestionável relevância na formação dos museus de arte portugueses. É todo o processo relativo à sua descrição, indexação, digitalização, preservação digital e acessibilidade que trazemos para reflexão.

The museum is, by excellence, a repository of patrimonial heritage and has his greatest responsibility on acquiring, preserving, studying and disseminating the cultural objects under his custody, so they can be known by as many people as possible.

In order to successfully fulfill this mission, it is necessary a full and constant knowledge of the objects that represent the Museum's Collections and History. For this purpose, the Museum had to tool up with a system of classification and registration of cultural property, target of a constant evolution that follows both changes occurred in museums as well as the technological development of the last century[1].

Museums' Archives often suffer from a constant decrease of interest in their management, preservation and availability. In Portugal, although the management and availability of museum´s resources have had a significant development in the past twenty years, most of its archives are extremely difficult to study. These funds remain closed to the general public due to poor management, preservation and description.

This situation is due to some structural strategies regarding the Portuguese cultural sector, such as:

a. Archivists, librarians and museums experts undergo different training. The first two received, until very recently, the same training and career guidance[2] which led to the creation of the Portuguese Professional Association of Librarians and Archivists (APBAD), with museums being left outside;

b. Although archives and libraries are overseen by the same institutional body, museums are under different management. Due to this management divide, archives, libraries and museum professionals end up using different policies, techniques and standards.

c. The ongoing assimilation of international rules of description by the three bodies, not only hindered the sharing of information among them but also created different national databases and networks that aren't necessarily connected[3];

d. The lack of structural funding available to these three cultural bodies inhibits the launch of joint projects for preservation, organization, description, digitization and the online availability of their shared resources.

However, things are changing gradually especially with museum libraries becoming more visible: meetings between professionals are increasing and sources of the museum are being seen as whole with the help of a shared informational system[4].

---

1. Matos, 2007, p. 3.

2. Until 1988, librarians and archivists shared the same training and were able to work in both institutions, since the post-graduate course had one common year of library studies. After 1988, each one had to choose archives or libraries, and the training became separated.

3. In the 1980s, with the benefit of UNESCO's free software CDS/ISIS, the national library started PORBASE database, implementing ISBD and its regulations to all Portuguese libraries. The effort was worthwhile, allowing the computerization of a great amount of libraries all over the country. Archives have also benefited from CDS/ISIs, with the creation of ARQBASE, promoted by Portuguese Institute for Archives (IPA) - 1988-1992, that consolidated ISAD and implemented in the majority of the district archives, as well as some municipal archives. However, the archive's network needed to wait more than a decade until another database – DigitArq was adopted.

4. Manuel Luís Real (1999), director of Porto's Municipal Archives claims precisely that "the technical documentation

ATLANTI • 22 • 2012 • n. 2

Andreia NOVO - Ema RAMALHEIRA ROCHA - Leonor CALVÃO BORGES: Describing and Preserving Documents in a Museum's Archive, 105-112

In addition to this, the academic community played an important role in the dissemination and study of archival sources for the history of museums as well as proposals for the cooperation between archives and museums[5], as well as international expertise, whose experience in these matters tend to reflect this approach, mainly when considering that " museum records, which keep the history and evolution of the hosted collections, request proactive curation in order to preserve this rich and diverse information". (Gavrilis, 2003)

The recent creation of a working group on information system in museums (GTSIM) in May 2012, which brings together professionals from the three areas[6] with the aim of studying integrated solutions for the three sub-systems, is one step closer to have the museum functioning as a whole, regardless of the nature of the objects or documents.

The understanding of the archive as a fundamental aspect of the history of the museum and its artworks has brought to us innovative academic projects, for the treatment of their collections. The research project "Sources for the History of Art Museums in Portugal", lead us through the experience of the description, digitalization and online data of the documental assets kept in National Museum of Ancient Art (from 1890 till now). It is precisely the work developed in this project that we suggest for this presentation. It is precisely the work developed in this project that we bring to the public.

With the celebration of the hundred years of the Portuguese republic in 2010, there were many research projects taking place related to this historical period. In fact, the first Portuguese republic and its new political and social context contributed largely to the birth of many Portuguese museums.

Given the lack of academic analysis and references of original documents related to Portuguese art existent in the History of Art museums, this project aims at studying the most important archives of public and private institutions that have never been accessible to public survey. Thus, this project also intends to provide an answer to the needs of not only several PhD researchers, but also relevant institutions that felt the need to search for a trustful partnership to help them study and make their archives accessible.

The project "Sources for the History of Art Museums in Portugal" aggregate important PhD projects that have their focus on this theme: the study of Hugo Xavier about the Royal Academy of Fine Arts, an institution that precedes even during the monarchy, the existence of the NMAA, a study of Emilia Ferreira about Ornamental Art Exhibition, an event that determined the space that would accommodate the museum a few years later; and the reflection of Joana Baião about José de Figueiredo, the first director of the museum and one of the central personalities in the history of Portuguese art.

In order to ensure this project's viability, we have established partnerships with the public supervisor of Portuguese museums, the Institute for Museums and Conservation (IMC). The National Museum of Ancient Art (MNAA) will be the subject of many research activities, as well as the National Palace of Ajuda (PNA), which preserves a fundamental source for the study of royal collections integration in public museums. This project is also working closely with the Calouste Gulbenkian Foundation, focusing on its Fine Arts Service's archives. Finally, the process of digitization and online accessibility is being developed by the custodial institutions in partnership with the National Archive – Torre do Tombo.

It is this collaborative project – lead by the Institute of Art History of the University Nova de Lisboa – and the choices made about the description, indexing, digitization, digital preservation plan and their availability to the public that we plan to present.

MNAA's task in this project is dedicated to the organization, inventory and public communica-

---

can be managed by an integrated manner".

5. Ines Bueso, who recently achieved her master's degree with a final essay entitled "Archives and municipal museums: contributions to the definition of policies, strategies and methodologies of cooperation", writes about the significance of museums' archives as essential information sources to the collective identity and heritage protection. Based on the reflection on community life and the role of these institutions in their training, this essay aims to formulate cooperation proposals for local archives and museums.

6. It's interesting to see that ICOM's European Referential of Museum Professions do reflect this position.

tion of MNAA's historical archive, as well as the selective digitalization of its most relevant nucleus. This is a fundamental archive not only to study MNAA's own history and its collections but also to keep the memory of the museological practice defined as a guideline to the national museums. Within the scope of this project, MNAA assure the right conservative protection of its archival heritage and the public communication through an online database.

The first task was to recognize the different existing funds and decide what to describe and digitalize. This is a fundamental archive not only to study MNAA's own history and its collections but also to keep the memory of the museological practice defined as a guideline to Portuguese national museums.

Thus, the archive of the Museum itself - physically dispersed by several floors of the Palace and with different "guardianship" - consists of:

- The current and intermediate archives guarded and used by the Secretariat;
- The definitive (or historical) archive commonly referred to as "dead" or inactive archive, also supervised by the Secretariat;
- The archive of the Department of Education made of by textual and visual records, since 1953 and arranged in thematic order;
- The Photographic Archive which kept growing until the creation of the National Photography Archive, currently known as Division of Photographic Documentation of IMC. It consists of about 32,000 images, including the first glass slides as well as other support mediums. These are fundamental to the history of the museum, since it includes images of objects of several collections and numerous exhibitions as well as images of the successive improvements of the building itself. It also has reports of exhibitions made in other national and international museums, allowing us to study the development of museological exhibition concepts mainly in European museums. This Archive has been organized according to a classification scheme and has been studied by Belarmina Ribeiro in 1960s;
- The clipping archive, as a result of carrying out a subscription with a specialized company in 1943 that is fed up to today, this collection contains other examples with an earlier date, with about 31,000 clippings;
- The Office of the file prints: this set of documents is referred as the collection of posters, founded in 1949;
- The Records of the Restoration Office consists of files with reports and records of interventions such as the conservation and restoration of paintings (1978-2000);
- The file of projects contains a significant number of drawings related to the improvement and the expansion of the Museum.

Apart from the MNAA archive, the following funds were also identified: Exhibition of Ornamental Art; National Academy of Fine Arts; National Museum of Fine Arts; Conservatives Museum Training; Group of Friends of the Museum; José de Figueiredo (1st Director); João Couto (2nd Director); Maria José de Mendonça (3rd Director).

Bearing in mind the dimensions of this archive, a working chronology has been developed. In this project we only worked with the following funds: National Academy of Fine Arts (ANBA), Exhibition of Ornamental Art (EAO), and the production of the first Museum directors – José de Figueiredo (1911-1937) and João Couto (1938-1962).

The first two funds presented in this presentation are the National Academy of Fine Arts (ANBA) and the Ornamental Art Exhibition (EAO). These define the pre-existence of the Institution of the Museum of Ancient Art as we know it today.

The Royal Academy of Fine Arts was founded in Lisbon on the 25th of October 1836 by decree of Queen Mary II, following to the liberal decree of 28th May 1834, which determined the convents closure.

Under the Royal Academy of Fine Arts in 1836, the state became responsible for managing a considerable amount of movable cultural property. However, only in 1869 the opening of the first public gallery of the Academy of painting took place, in the former Convent of S. Francisco Lisbon,

which also featured a collection of significant bequests and donations. This would lead to the creation of the future national museum.

However, it was only after the large success achieved by the Retrospective Exhibition of Spanish and Portuguese Ornamental Art, organized in 1882 in the halls of the palace Alvor-Pombal, that this building was purchased by the state under the name of National Museum of Fine Arts and Archeology.

A second version of the Retrospective Exhibition of Spanish and Portuguese Ornamental Art happened a year after the original exhibition had taken place at South Kensington Museum, London, now named Victoria & Albert Museum. Untitled "Special Loan Exhibition of Spanish and Portuguese Ornamental Art", this exhibition was a major driver to the implementation of the National Museum in Lisbon.

The documentation of these two funds, the Academy of Fine Arts and the Exhibition of Ornamental Art, reflects all the object selection process used throughout Portugal. Formed mainly by inventory books and a wide range of inventory and loan forms, we can also find some sketches in this documentation related to the nineteenth century exhibition museography.

With the collapse of the monarchic and the implementation of the Portuguese Republic, the Museum of Fine Arts ceased to depend on the Royal Academy, changing its name to National Museum of Ancient Art in 1911 and headed by the first director José de Figueiredo (1911-1937).

Figueiredo was born in Oporto in 1872. He was director at the General of Public Instruction of the Ministry of the Kingdom, member of the Supreme Council of National Monuments and also performed academic duties at the Royal Academy of Fine Arts, before taking the leadership of the MNAA.

Figueiredo played a crucial role in the creation and research of MNAA collections and also contributed to the foundation of the Group of MNAA's Friends (GAMNAA) in 1912. This broadened to the structure of a larger group of Portuguese Museums.

Born in Coimbra in 1892, João Couto continued Figueiredo's work. After being appointed adjunct conservator of Machado de Castro Museum in 1915, Coimbra, he began his collaboration with the Museum of Ancient Art in 1924.

João Couto was responsible for enlarging, renovating and modernizing the Museum's infrastructure. Nevertheless, his biggest achievement was related to the social role of the Museum: he promoted staff training, fostered the public's knowledge of the Museum and encouraged the training of curators. Couto's ideas were influenced by Anglo-Saxon and North American models which were then adopted by several public nacional and regional museums as well as some private institutions such as the Calouste Gulbenkian Foundation.

José de Figueiredo and João Couto's funds represent the majority of the treated documentation. The documentation of Figueiredo's fund did not have an initial classification plan and it was only organized according to overall themes, physically kept in documentation boxes. Most of these boxes include information about Figueiredo's various work positions, however there are also other boxes regarding different MNAA's curators, who were working together with Figueiredo at the time.

The biggest fund included in this project is Couto's fund, between 1937 and 1962, during the Portuguese fascist regime (1933-1974). For this reason we can find an important fund trait that allows us to understand the Portuguese artistic and museological context of this historic period. When this project began, a classification plan that reflected the variety of documents was already existent in this fund.

In the beginning of our project, MNAA's information system was made of three sub-systems working in silo:

1. The Matriz database which describes art objects, according to the inventory standards and

recommendations by the Conservation and Museum's Institute (IMC)[7]. It is available on line at the museum's website[8] and at the Portuguese Network of Museums. In this database, bibliographical descriptions can be seen attached to the description of each object and a subject indexation is also available.

2. The Bibliobase, a bibliographic database which describes books and serials, was produced in accordance with the ISBD and Portuguese Cataloguing Rules (RPC). It is available on line at the museum's website and it has no connection with the Matriz database. Although subject indexation is available, the indexing language is not shared with the Matriz.

3. Manuscripts were neither described nor available to the general public, but could be consulted for academic thesis. Its location was dispersed, combining challenges with both space management and preservation of documents.

The democratization of technology allowed the development of hardware and software, easily explored by non specialized users, and the need to deal with numerous records of objects and their documentation have made that, since the 1980s, there were some occasional attempts to create a computerized system that could fulfill the need of the specific needs of the inventory for the collections and the description of related archives.

Due to multiple circumstances, the use of new technologies in Portuguese museums was late. Nevertheless, in the mid 1990s, the Portuguese Institute of Museums (IPM) created a project for the development of software that could help the achievement of a better inventory and management of museum's collections. This software called Matriz is composed by two independent modulus, which are able to create a complete system of inventory description and visual representation of the museum's objects, as well as monitoring the art works circulation. Today this is the tool used by museums overseen by the IPM, as well as a number of other institutions in the country.

There are many cases in which museums, libraries and archives coexist in the same institutional structure. MNAA is one of them.

In spite of its qualities and the development of a new and more accurate version, which includes the inventory of documental assets and some of its specific rules, Matriz software doesn't allow an integrated management between the description of a museum collection and the museum's archival and library.

Therefore, the archival description is being performed with a software program called DigitArq, in accordance to the ISAD (G), EAD, ISAAR (CPF) and EAC.

With the use of DigitArq for archival description, Matriz for the museum's collection, and Bibliobase for bibliographic description, researchers must search in three different databases – quite common in museums – even though one can find records or books related to an art work.

In fact, in the majority of the institutions, there is still not an integrated management of the archival and museological availability. The ideal and future goal is give the user (especially online) not autonomous platforms and researches but a common database, ensuring a more sustainable and practical management.

Boyd Rayward and George Miller, both science information professors in the United Kingdom and the United States, claim that the future goal of the proper management of electronic information sources can only be achieved through by an integrated management, where the differences between libraries, archives and museums tend to disappear. The impact of electronic technology in the traditional functions of these institutions is very important[9].

A good example of an integrated system of archival and museum information is the one available

---

7. The collection "Norms of Inventory has eleven volumes published and available on-line, two of which are dedicated to the General Standards Inventory for the Arts and Decorative Arts and Archaeology. The remaining volumes, Specific Norms Inventory, treat different types of movable cultural property: Agricultural implements, Ceramics, Ceramic Coating, Utilitarian Ceramics, Sculpture, Documentary Estate, Furniture, Paintings, Textiles and Textile Technology.

8. www.mnarteantiga-ipmuseus.pt/.

9. Bueso, 2011, p. 64.

at Benaki Museum[10], even though library information is left outside. The description of the project can be seen in Gavrilis, Dimitris, Tsakonas, Giannis and Papatheodorou, Christos, Designing interoperable Museum Information Systems.

For the time being, and due to economical issues, MNAA's informational system must be kept in different databases, but an integrated overview of the information – with an integrated database or a unique search for the three databases – must prevail.

Meanwhile, the digitization of the funds occurred according to the National Archives procedures (Tiff files to archive and PDF (A) or JPEG for users), and made available on the national archives website[11], becoming the first national museum to do so. With this step of on-line availability of its own resources, MNAA stated an important public policy of information dissemination.

In the future, digital preservation plans must be kept, in order to maintain this heritage available for future generations. Portuguese National Archives play here an important role, with the creation of RODA - the national digital archive, developed by DGARQ, with the collaboration of the University of Minho. RODA was built based on the OAIS (Open Archival Information System) and technical documents produced under the project Peer 2. The base platform is based on the RODA repository FEDORA, using various metadata schemes including the EAD (Encoded Archival Description), PREMIS (Preservation Metadata: Implementation Strategies), METS (Metadata Encoding and Transmission Standard), Z39.87. RODA will be linked with the Portuguese Archives Network (RPA) and intend that the provision of converters will be a service offered in the context of RPA.

Bibliography

Maria Inês Cabral de Oliveira Bueso, Arquivos e Museus Municipais: Contributos para a Definição de Políticas, Estratégias e Metodologias de Cooperação, Lisboa 2011.

João Couto, O Museu Nacional de Arte Antiga. Seu alargamento e acção cultural, "Boletim do Museu Nacional de Arte Antiga", III(1956), n. 2, pp. 57-64.

Emília Ferreira, Lisboa em Festa: A Exposição Retrospectiva de Arte Ornamental Portuguesa e Espanhola, 1882, Antecedentes e Materialização. Dissertação de doutoramento em História da Arte Contemporânea, Lisboa 2010.

FERREIRA, Emília, Exposição de Arte Ornamental in http://digitarq.dgarq.gov.pt/details?id=4712496, visitado em 31-07-2012.

Dimitris Gavrilis - Giannis Tsakonas - Christos Papatheodorous, Designing interoperable Museum Information Systems, In http://www.google.pt/url?sa=t&rct=j&q=informations+systems+museums+news+standards&source=web&cd=3&ved=0CFoQFjAC&url=http%3A%2F%2Fwww.wcl1.ece.upatras.gr%2Fgetfile.php%3Ffid%3D114%26type%3D3&ei=ctQfUOL0K-W8iAef0YGYBA&usg=AFQjCNEKeEY0JJkeC8AMHiJkMS_kGBPGZA (visited in 01-08-2012).

Isabel da Costa Marques, O Museu como Sistema de Informação, Porto 2010.

Alexandre Manuel Ribeiro Matos, Os sistemas de informação na gestão de colecções museológicas - Contribuições para a certificação de museus, Porto 2007.

Manuel Luís Real, Sistemas de Informação em Museus, "O Arqueólogo Portuguez", S. IV(1999), n. 17.

Belarmina Ribeiro, Arquivo Museológico. Relatório apresentado ao Instituto de Alta Cultura, 1957.

Angelika Ruke, (dir.), Referencial Europeu das Profissões Museais, 2008

Hugo Xavier, Academia Nacional de Belas Artes, In http://digitarq.dgarq.gov.pt/details?id=4712513 (visited in 31.07.2012).

---

10. http://www.benaki.gr/.

11. http://digitarq.dgarq.gov.pt/.

Andreia NOVO - Ema RAMALHEIRA ROCHA - Leonor CALVÃO BORGES: Describing and Preserving Documents in a Museum's Archive, 105-112

SUMMARY

The museum is, by excellence, a repository of patrimonial heritage and has his greatest responsibility on acquiring, preserving, studying and disseminating the cultural objects under his custody, so they can be known by as many people as possible. In order to successfully fulfill this mission, it is necessary a full and constant knowledge of the objects that represent the Museum's Collections and History. Museums' Archives often suffer from a constant decrease of interest in their management, preservation and availability. In Portugal, although the management and availability of museum´s resources have had a significant development in the past twenty years, most of its archives are extremely difficult to study. This situation is due to some structural strategies regarding the Portuguese cultural sector, such as:

a) Archivists, librarians and museums experts undergo different training. The first two received, until very recently, the same training and career guidance which led to the creation of the Portuguese Professional Association of Librarians and Archivists (APBAD), with museums being left outside;

b) Although archives and libraries are overseen by the same institutional body, museums are under different management. Due to this management divide, archives, libraries and museum professionals end up using different policies, techniques and standards.

c) The ongoing assimilation of international rules of description by the three bodies, not only hindered the sharing of information among them but also created different national databases and networks that aren't necessarily connected;

d) The lack of structural funding available to these three cultural bodies inhibits the launch of joint projects for preservation, organization, description, digitization and the online availability of their shared resources.

However, things are changing gradually. The recent creation of a working group on information system in museums (GTSIM) in May 2012, which brings together professionals from the three areas with the aim of studying integrated solutions for the three sub-systems, is one step closer to have the museum functioning as a whole, regardless of the nature of the objects or documents. The understanding of the archive as a fundamental aspect of the history of the museum and its artworks has brought to us innovative academic projects, for the treatment of their collections. The project "Sources for the History of Art Museums in Portugal" aggregate important PhD projects that have their focus on this theme. It is this collaborative project – lead by the Institute of Art History of the University Nova de Lisboa – and the choices made about the description, indexing, digitization, digital preservation plan and their availability to the public that we plan to present.