Autumn 2023 Priority Projects

Proposal for Standard Excel Catalog Templates

Pacific Northwest Railroad Archive

Goals

- No single standard for .XLSX catalog files at the PNRA

- Saving volunteer time in establishing collections

- Increasing buy-in to AToM software

- Final product uploaded to PNRA 45

Design Process

- Conducting a listening tour for feedback towards iterative design

- Combing all PNRA catalog spreadsheets for trends and outliers, visually representing these findings

- Influence of AToM and SharePoint

Listening Tour

A five-question interview kicked off the assessment:

- Benefits of new catalog template standards?
- Drawbacks of new catalog template standards?
- Cautions or 'gotchas!' to consider?
- Your referrals to other sources of insight or authority?
- Final thoughts?
- Additional notes

- A big thank you to all participants!

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Listening Tour

- Priorities: preservation, ease-of-use for volunteers, RHO-friendly, searchable/AToM-compliant.

- Common ground: simplification without data loss, visually accessible interface for users, gentle introduction to format change via training.

- Underline: cohesive yet tailored product

Prototypes

Left prototype table:

	Ephemera	Photomedia	Bibliography	Profiles	Drawings	Timetables
Item/Print Title	X	X	X		X	X
Date (dd/mm/yyyy)	X	X	X	X	X	X
Box Number	X				X	X
Description	X	X	X	X	X	X
Comments/Notes	X	X	X	X	X	
Station		X				X
Railroad		X		X		X
(Sub)Division				X	X	
Location (State)		X	X	X		
Item Number		X			X	
Series Info.					X	
Equipment Info.		X			X	
Item Dimensions					X	
Subject(s)		X	X			
Author		X	X		X	
Source	X	X	X	X	X	
Cataloger	X				X	
Citation (book/page)		X				
Releases/Revisions			X		X	
Quantity	X		X			X

Right prototype table:

	Ephemera	Images	Drawings	Railroad Documents
Date	★	★	★	★
Scope/Content	★	★	★	★
Railroad	★	★	★	★
Location	★	★	★	★
Subject 1	★	★	★	★
Subject 2	★	★	★	★
Item	★	★	★	★
Box Number	★	✖	★	✖
Station	✖	★	★	★
Division	✖	✖	★	★
Subdivision	✖	✖	★	★
Item Number	★*	★	★	★*
Series	✖	✖	✖	✖
Equipment	✖	★	★	✖
Author	✖	★	★	✖
Source	✖	★	★	✖
Cataloger/Owner	★	★	★	★
Revisions	✖	★	★	✖
Quantity	★	✖	✖	✖

Bottom-left spreadsheet prototype columns: Photo ID | Title | Scope & Content | Subject | Station | State | Railroad | Date | Creator | Notes

Prototypes

	Ephemera	Images	Drawings	Railroad Documents
Date	★	★	★	★
Scope/Content	★	★	★	★
Railroad	★	★	★	★
Location	★	★	★	★
Subject 1	★	★	★	★
Subject 2	★	★	★	★
Item	★	★	★	★
Box Number	★	✖	★	✖
Station	✖	★	★	★
Division	✖	✖	★	★
Subdivision	✖	✖	★	★
Item Number	★*	★	★	★*
Series	✖	✖	★	✖
Equipment	✖	★	★	✖
Author	✖	★	★	✖
Source	✖	★	★	✖
Cataloger/Owner	★	★	★	★
Revisions	✖	★	★	✖
Quantity	★	✖	✖	✖

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Live Demo

- .XLSX catalog templates for ephemera, images, railroad documents, and drawings are annotated for ease of use.

- Guidance from Bill Petryk's photo data entry template—including direct borrowing of phraseology—it is brief, comprehensive and AToM compliant.

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Next Steps

- **Template prototypes are complete and feedback has been collected; continuous feedback is appreciated.**

- **The final version combines your feedback with our findings, and is polished before uploading.**

- **Expect an upcoming rollout info session!**

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Thank you very much!
Your time and consideration
are of great consequence.

Final results pending!