DOI Museum Property Directives

Title: Interior Collection Management System (ICMS)
Directive Number: 18
Originating Office: Office of Acquisition and Property Management, Department of the Interior (DOI)
Approved By: Debra Sonderman
Official Title: Director, Office of Acquisition and Property Management
Effective Date: SEP 21 2012
Expiration Date: This Directive will remain in effect until superseded.

1.1 Purpose. To provide policy on ICMS, the DOI-wide information management system used to document all bureau/office museum property (museum collections) and specific collection management activities. ICMS is intended to:

A. Ensure uniform record keeping of DOI museum collections data for accountability and resource management purposes.

B. Provide data to support DOI and bureau/office oversight of bureau/office museum collections.

C. Track the status and condition of DOI museum objects for collection management and reporting purposes.

D. Monitor the condition of bureau and non-bureau facilities housing museum collections to ensure compliance with the museum standards in 411 DM and the DOI Museum Property Directives and for collections management and reporting purposes.

E. Provide data about DOI museum collections in response to inquiries from Congress, Office of Management and Budget, DOI leadership, and the public.

F. Provide museum collections data to support interaction, collaboration, consultation, and partnerships among DOI bureaus/offices, Indian tribes, and partner institutions.

G. Facilitate the exchange of museum collections data in support of collection management, scientific study, resource stewardship, public outreach and education, and other uses of DOI museum collections.

1.2 Scope. This policy applies to all bureaus and offices responsible for managing museum collections.

1.3 Definitions. See Section 1.12 below.

1.4 Responsibilities.

A. Director, Office of Acquisition and Property Management (PAM) is the ICMS system owner and is responsible for overall system acquisition, development, and integration; developing DOI-wide policy and procedures for the system; appointing the ICMS Program Manager; overseeing the ICMS Change Control Board; and providing training on the use of ICMS.

B. Heads of Bureaus and Offices and the Assistant Secretary - Indian Affairs are responsible for ensuring that ICMS is used to document all museum collections and that the required standards in Section 1.5 of this Directive are followed in accordance with relevant laws, regulations, and permits, contracts, and other agreements. If ICMS is not fully implemented at the issuance of this policy, the Heads of Bureaus and Offices and the Assistant Secretary - Indian Affairs must ensure that a plan to implement ICMS is developed and executed.

C. ICMS Change Control Board (CCB) ensures that the interests of all DOI bureaus/offices are represented with regard to ICMS. The CCB consists of at least one representative identified by each bureau/office who is knowledgeable in the use of ICMS, collection management, and bureau policy. The CCB meets at least annually, is chaired by the ICMS Project Manager, and is responsible for:

(1) Soliciting input for changes to ICMS from DOI bureau/offices.

(2) Obtaining input from discipline specialists and information technology experts.

(3) Making recommendations on proposed changes to ICMS to the Director, PAM.

D. ICMS Project Manager is responsible for managing the DOI-wide ICMS project, including:

(1) Serving as the primary ICMS point of contact for PAM, the Museum Property Executive Program Committee (EPC), and the Interior Museum Property Committee (IMPC).

(2) Developing, overseeing, and managing the DOI-wide ICMS budget.

(3) Serving as the Contracting Officer's Representative for the DOI-wide ICMS contract, which covers matters including:

(a) Technical support for all DOI and non-DOI users of ICMS.

(b) Updates to ICMS.

(c) Data migration of museum collection data between other software applications and ICMS.

(d) Development and customization of reports and special features.

(4) Providing CCB members with current information on all user requests for changes to the ICMS software.

(5) Coordinating communications, including CCB recommended changes to ICMS, between the CCB, PAM, and the ICMS vendor.

(6) Coordinating with the DOI Office of the Chief Information Officer on matters concerning enterprise systems, including security requirements.

(7) Tracking and documenting project performance in order to meet the purpose of ICMS, as stated in Section 1.1 of this Directive, and ICMS goals and objectives.

(8) Providing a quarterly report, at a minimum, to the IMPC concerning recommended changes to ICMS, status of bureau/office implementation, training, and other matters.

(9) Ensuring user instructions are updated, as appropriate.

E. A Bureau/Office ICMS Administrator is appointed by each bureau/office and is responsible for the management of ICMS at the bureau/office level, including:

(1) Establishing policy and procedures for managing and using ICMS (see also Section 1.9 of this Directive), as applicable, and providing policy support to users.

(2) Identifying bureau/office and non-DOI users.

(3) Establishing protocols for working with non-bureau facilities housing DOI museum collections, including agreements, responsibilities, costs, database compatibility, and access.

(4) Coordinating with bureau/office IT security, configuration, and systems offices as appropriate.

(5) Other requirements as designated in bureau policy.

1.5 Standards. 411 DM 1.9 provides the general requirements for the use of ICMS for documenting DOI museum collections. The required standards and mandatory data to

document museum collections are found in DOI Museum Property Directive 3, *Required Standards for Documenting Museum Property.* ICMS includes data fields, functions, and report to meet the mandatory documentation standards for:

(1) Acquisition and Accessioning (Directive 19).

(2) Cataloging (Directive 20).

(3) Inventory (Directive 21).

(4) Loans (Directives 22 and 23).

(5) Deaccessioning and Disposition (Directive 25).

1.6 Use of ICMS in Facilities. Staff at any bureau or non-bureau facility housing DOI museum collections can use ICMS to manage DOI museum collections under the DOI ICMS contract and software license. The following must be considered when using ICMS in such facilities:

A. DOI Users. Bureau curatorial and museum property management staff and contractors must use the current version of ICMS to document all bureau/office museum collections and specific collection management activities, including the Automated Checklist Program and Automated Inventory Program.

B. Users in Non-Bureau Facilities. Users in non-bureau facilities housing DOI museum collections have two options for electronically documenting DOI museum collections:

(1) The current version of ICMS as established in a contract, repository agreement, or similar instrument; or

(2) An information management system that contains data compatible with all DOI mandatory data to ensure import into ICMS.

C. Data Migration. ICMS supports the import and export of data to and from other software applications, such as spreadsheets and databases. Museum collection data from other software applications used by non-bureau facilities must include DOI mandatory data for import into ICMS. The ICMS vendor is available to assist bureaus/offices with data conversion and data migration.

D. Agreements. A statement regarding the use of ICMS and mandatory data transfer must be included in all agreements (e.g., repository, curatorial services, cooperative, or grant) established after issuance of this Directive. If agreements were established prior to issuance of this Directive, future updates to those agreements must include this language. The bureau/office must provide the DOI mandatory data standards in Directive 3, *Required Standards for Documenting*

Museum Property, to the non-bureau facility for accessioning, cataloging, inventorying, lending, and deaccessioning DOI museum collections.

(1) If a non-bureau facility agrees to use ICMS for the management of bureau/office museum collections, the agreement must include language regarding data transfer.

(2) If the non-bureau facility does not use ICMS, the agreement must include protocols for transferring DOI mandatory data that is compatible with ICMS.

1.7 Museum Collections Data Updates. Museum collections data must be updated as changes occur or as new information is acquired, such as a change in location or condition of an object.

1.8 Museum Collections Reporting. Bureaus/offices must use the data in ICMS, as practicable, to fulfill museum collections reporting requirements as stated in 411 DM 1.12, audit requests, and any additional reporting requirements.

1.9 Bureau/Office Policy. All bureaus/offices with museum collections must determine if additional policy and/or guidance specific to the use of ICMS is needed to address requirements in further detail. This may include, but is not limited to, bureau/office security requirements, data updates, use of reports, and data conversion and migration.

1.10 Customization. The ICMS vendor is available to develop and/or customize ICMS reports and special features for a bureau/office.

1.11 Instruction and Technical Support.

A. User Instructions. The *ICMS User Manual* is available to all bureaus/offices managing museum property and bureau/office partners at: www.doi.gov/museum/icms.htm. The *ICMS User Manual* provides specific instructions for use of all of the ICMS features and functions. Bureaus/offices may develop supplemental instructions for ICMS reports and special features of ICMS customized for the bureau/office.

B. Technical Support. ICMS technical support, including all updates to the ICMS software, is provided under the DOI ICMS contract for all DOI users and all users in non-bureau facilities managing DOI collections. The ICMS vendor will provide support for technical and procedural questions on ICMS according to the DOI ICMS contract.

C. Training. PAM provides DOI-wide training in the use of ICMS. A bureau/office may develop ICMS training specific to its needs. The vendor or ICMS Project Manager is available to assist bureaus/offices with specialized training according to the DOI ICMS contract.

1.12 Definitions. Many of the following definitions are taken directly from 411 DM and therefore refer to museum property. Museum property and museum collections are synonymous in these definitions.

Automated Checklist Program – A tool in ICMS that generates the Facility Condition Checklist for Spaces Housing DOI Museum Property, which is used by a bureau/office unit to evaluate how well a facility meets DOI preservation and protection standards.

Automated Inventory Program – A module in ICMS that generates the data and reports necessary to complete the required annual inventory of controlled museum property, randomly selected cataloged museum collections, and randomly selected accessioned museum collections.

Data conversion - The translation of data from one format to another. Often when data is moved from one system to another, some form of data conversion is required to convert the data to a format the receiving system can interpret.

Data migration – The process of transporting data between computers, storage devices, or formats. Data migration is a key consideration for any system implementation, upgrade or consolidation. During data migration, software programs or scripts are used to map system data for automated migration.

Facility - A building, administrative unit, or partner facility that has space(s) dedicated to the display, exhibit, study, and/or storage of museum property.

Mandatory Data - Information about museum collections that must be documented in the appropriate museum record according to Departmental policy (see Directive 3.)

Museum collection / Museum property - A subset of personal property, including objects, works of art, and/or archives, that is retained for long-term preservation, study, and interpretation consistent with statutory requirements, its relationship to the mission of the respective bureau/office, or other appropriate factors. A museum collection / museum property is acquired according to a rational plan, such as a Scope of Collection Statement. It consists of all accessioned, unaccessioned, cataloged, and/or uncataloged objects; and all museum objects under the control of a facility, unit, or bureau/office. Museum property is synonymous with and referred to as "museum collection(s)" in the DOI Museum Property Directives, as a standardized term that is used by museum professionals.

Non-bureau facility - Any facility, which a specific bureau or office does not own and/or operate and maintain, that houses the bureau or office's museum property. This includes facilities of other bureaus and offices within DOI, other Federal agencies, and entities outside of the Federal government, such as a museum or university.

Non-DOI users – Users of ICMS who are not employed by DOI bureaus/offices.

Object - A physical item of museum property. It includes art and history objects, archeological artifacts, ethnographic objects, archival items, and natural history specimens.

1.13 References.

ICMS User Manual (December 2009). www.doi.gov/museum/icms.htm

Departmental Manual Part 411, Chapter 1: Policy and Management Responsibilities for Museum Property.

DOI Museum Property Directive #3, Required Standards for Documenting Museum Property.