

SCATTER/GATHER

Scatter/Gather is an optional feature that can be added to your PastPerfect system for an additional cost. Scatter and Gather are intended for use by museums that enter data on two or more computers not connected by a network. The Scatter and Gather features are used to select and transfer data, images, and multi-media files from one PastPerfect computer and merge them with records on another PastPerfect computer.

NOTE

While Scatter/Gather will help you when PastPerfect is installed on more than one computer, you must be aware of the license restrictions involved. When you purchase the basic PastPerfect program, it is licensed to run on just one computer.

When you purchase Scatter/Gather, you are allowed to install PastPerfect on an additional computer that is used only to edit or input new records that will then be transferred to the main computer. The license does not allow use of the other features, such as Research, Reports, and Membership on the additional computer; those functions must only be performed on the main computer.

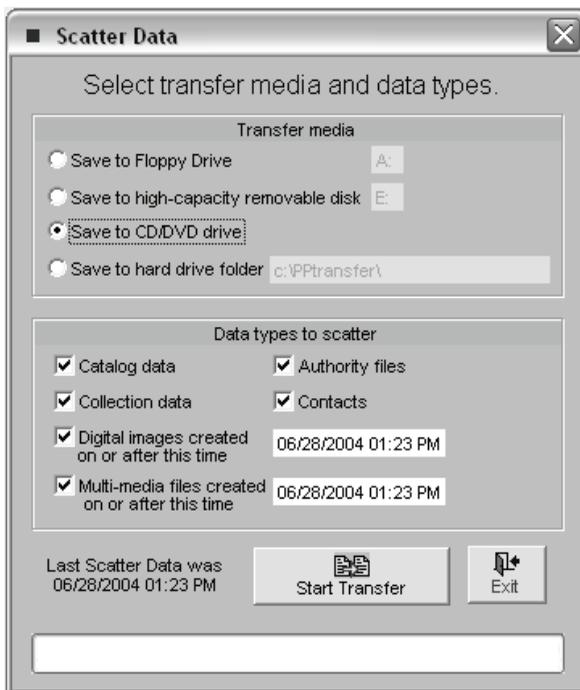
If you want to have additional computers with full PastPerfect functions, you must purchase the basic PastPerfect program for each computer.

Scatter/Gather, as the name implies, is a two step process. Data, images, and multi-media files from one computer are “scattered”, or placed, onto transfer media which is taken to the second computer where it is “gathered” or loaded. Both computers must have PastPerfect software installed and must be using the same version of PastPerfect.

SCATTERING DATA

On the scatter computer, click the **Scatter Data** command button that is located on the PastPerfect Utilities fly-up menu. Select the transfer media you will be using to move the data. If you will be moving images or multi-media, we recommend using a CD-R. For just data, floppy disks will be OK.

Figure 20-1
Scatter Data
screen



Select the type(s) of data you want to transfer by putting a check in the boxes under “Data types to scatter”. Notice for images and multi-media files, PastPerfect saves the last date and time that they were scattered.

Here are the files that are included in each data type:

Catalog data - Objects, Photos, Archives, Library, Appraisal History, Condition Reports, Location History, Container List, Oral History Recording List, Music Track List, and Update History.

Collection data - Accession, Deaccession, Exhibits, Loans, and Temporary Custody.

Authority files - the 100+ authority and combo box files listed on the Setup | Authority Files screen.

Contacts - Campaigns, Contacts, Donations, Dues, Mail-merge letters, Pledges, and Volunteer hours.

Digital Images - Images of catalog records, deaccession records, contacts, people, exhibits, and archaeological sites.

Multi-media files - Audio, Video, Word documents, Excel spreadsheets, Adobe PDF files, Archival images, and other linked multimedia files.

After making your selections, press **Start Transfer**. This function will compile the selected records, compress them, and copy them onto the media you selected.

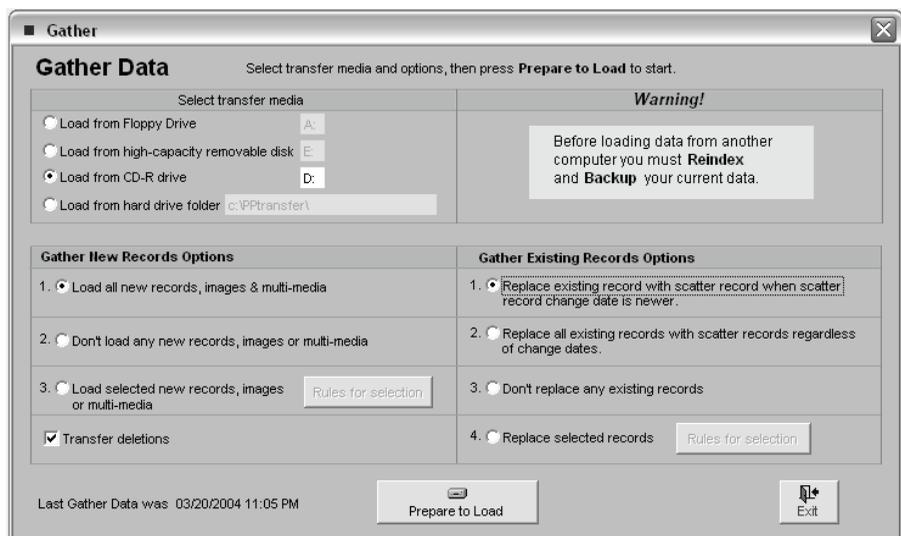
Now take the transfer media to the destination computer and use the **Gather Data** screen to merge the data. If you are saving the records to a hard drive folder, you will need access to that folder from the destination computer.

GATHERING DATA

Before loading the data on the second (gather) computer you need to Reindex and Backup. *This is an important step that should not be skipped.*

Then press the **Gather Data** command button on the Utilities fly-up menu to open this screen which allows you to load the data.

Figure 20-2
Gather Data
screen



A variety of options are available for you to select the exact data you want to gather.

First select the transfer media that contains the data. Next you will need to choose how the gather process deals with new records and existing records. New records are records placed on the transfer media by the scatter computer that have never been on the gather computer. Existing records are records that are already on the gather computer but may have been changed on the scatter computer.

GATHER NEW RECORD OPTIONS

There are three possible choices for gathering:

1. **Load all new records, images & multi-media.** This is the most common selection.
2. **Don't load any new records, images or multi-media.** This choice could be used when the Scatter computer contains a set of separate records as well as shared records and you only want to transfer changes made to the shared records that already exist on the Gather computer.
3. **Load selected new records, images or multi-media.** This choice allows you to be more selective about which New records to transfer. If used, you must press the **Rules for Selection** command button to open the Gather New Data Options screen shown in Figure 20-3.

There, you can make very specific choices about the data to be loaded; you can choose to load new data for data types you select: Authority Files, Images, Multi-media, Contacts, Collection, and/or Catalog records.

The data that is loaded may be further restricted by selecting only some Authority files, Contact, Collection or Catalog files. These selections are made by pressing the **Select files to include** command button next to the data type.

For Catalog records, you may also limit the data gathered to a specified Collection, Dataset or Home location.

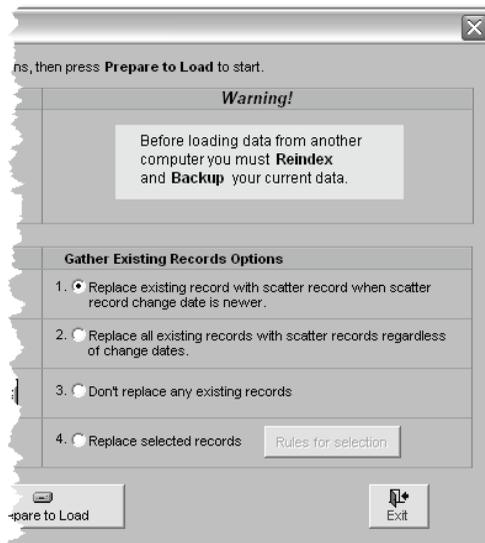
Figure 20-3
Gather New
Data Options
screen



GATHER EXISTING RECORDS OPTIONS

There are four choices for gathering existing records as shown on the right side of the Gather Data screen.

Figure 20-4
Gather screen
(right side)



1. Replace existing record with scatter record when scatter record change date is newer. This is the most common choice. When data is edited in PastPerfect, the date that the last edit was performed is recorded for each record. With this

option, records that have been changed later on the scatter computer will be loaded. *Please note that this process erases the entire record on the gather computer and replaces it with the record from the scatter computer. It is not possible to change only the modified fields.*

In most cases this will work fine with one exception. If a record is changed on both the scatter computer and the gather computer and the changes are different, the changes will not be combined. The record with the latest change date will be preserved and the other will not.

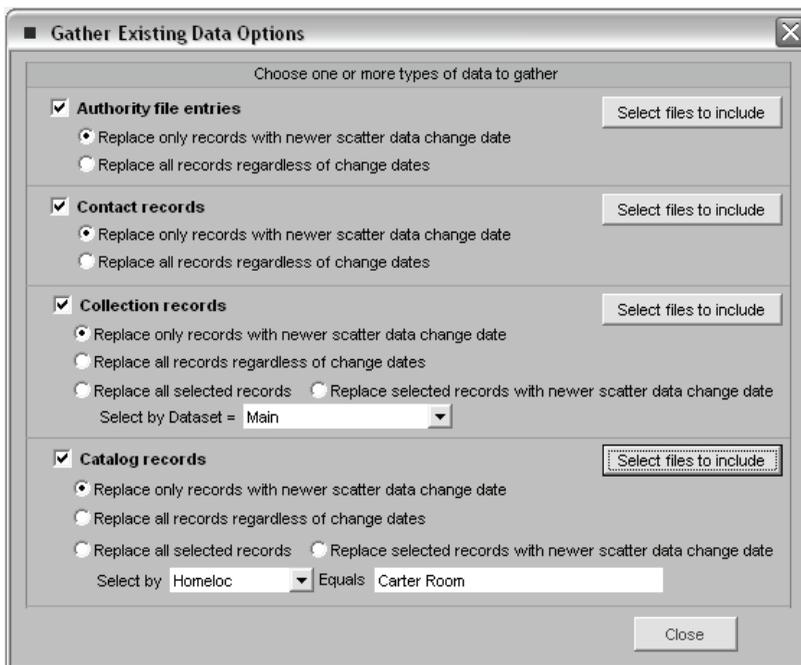
2. Replace all existing records with scatter records regardless of change dates.

This option should only be used if you want the records coming from the scatter computer to take precedence over the records on the gather computer. Changes made to records only on the gather computer will be lost.

3. Don't replace any existing records. This option should be used when you want to transfer only new records and not update existing records.

4. Replace selected records. Select this option and press **Rules for selection** to open the screen below where you can make specific choices about handling records that exist on both computers.

Figure 20-5
Gather Existing
Data
Options
screen



EXAMPLE 1: CATALOGING AT HOME

For this example, let's assume that you have a main computer in the museum and a laptop computer that a volunteer will use at home to enter records of historic photos. You want the volunteer to periodically bring the new records and load them into the main computer. This is the procedure you should use.

First, PastPerfect must be installed on both the main computer and the laptop. See Chapter 1 for instructions. Also, if you have a version of PastPerfect that was updated using an update downloaded from our website, you must be sure to load the update on both computers. The PastPerfect program version must be the same on both computers.

Before you start entering new records on the laptop, it would be helpful if it started with the data that is already on the main computer. Then you will be able to use authority files that have already been created and you will be sure you are not entering new records that already exist at the museum. To do this, scatter all data types to a transfer media at the museum and gather the data onto the laptop. Be sure to select the gather option **1: Load all new data, images, and multi-media**. The options for loading existing media do not apply since there was no PastPerfect data on the laptop.

At this point, both the main computer and the laptop will have identical sets of data and images. Now you can have the volunteer take the laptop home and start cataloging photos. If anyone at the museum will be entering new records at the same time, be sure that they are using a different range of object ID numbers. You do not want the two workers to be cataloging different items with the same number.

At home the volunteer enters new Photo catalog records including information in the Accession file about the donors. For each record they scan the photo to attach a digital image. They also enter detailed condition reports for some of the photos.

When the volunteer is ready to transfer the new records and images to the museum computer, open the **Scatter Data** screen on the laptop. On this screen put check marks next to Catalog data, Collection data, and Digital Images. Since they will be transferring images, select **Save to CD/DVD** as the transfer media. Fortunately the laptop is equipped with a CD burner to make this possible.

Now click **Start Transfer** to place the records and images on the CD. Take the CD to the museum, where the new records will be loaded.

At the museum computer, be sure to Reindex and Backup all data before starting the gather process. Then on the **Gather Data** screen select the options, *Load from CD-R* and *Load all new data, images, and multi-media*. Assuming that no records existing on the museum computer were edited on the laptop, the options for loading existing data do not apply. Now press the **Prepare to load** command button.

The Pre-load Information screen will list Photos, Accession, Media (images) and Condition reports as the new data to be loaded. Press **Load Data Now** to complete the process. You can repeat this process as often as you like as the volunteer continues to catalog.

EXAMPLE 2: EDIT SOME RECORDS IN THE GALLERY

For this example, let's assume that you want to take a laptop out into the gallery to update locations, descriptions, and condition reports for some items, then load the updated information into the main museum computer. This procedure is a bit trickier than the first example because we are now dealing with catalog records that already exist on the main computer. Here are the steps:

First, scatter all data, images and multi-media files from the main computer and gather them onto the laptop. We are assuming the same version of PastPerfect is already installed on both computers.

Next, you must notify anyone who may be making changes to catalog records on the main computer that they must refrain from changing any of the records that might also be changed on the laptop. If different changes are made to the same record on each computer it will be impossible to combine both changes. One of the records must take precedence over the other during the gather process. This is determined by who made the last change. A good way to avoid this problem is to instruct users of the main computer not to edit any records for a certain collection or with a certain home location that identifies the group of records that will be updated on the laptop. For example, if the laptop will be used in the Gallery to update information on the "Hanley Family Collection", instruct other users not to edit any records in that collection.

Now you can take the laptop into the gallery and start updating the records. When you have finished with the updates, open the **Scatter Data** screen, select **Save to Floppy Drive** and put a check mark next to **Catalog data**. This choice will include all information for Objects, Photos, Archives, Library, Appraisal History, Condition Reports, Location History, Container List, Oral History Recording List, Music Track List, and Update History in the transfer. During the gather process you can further restrict the data that is transferred. Select the transfer media as Floppy Drive and press **Start Transfer**.

Next take the floppy disk(s) to the main computer. Reindex and Backup the data and then open the **Gather Data** screen. Set the transfer media to Floppy Drive and insert the disk. Since you probably entered new condition reports on the laptop, select **1. Load all new records, images and multi-media**. Then on the right side of the screen, under Gather Existing Records Options, select **4. Replace selected records**. Next to that choice press the command **Rules for selection**. On the next screen place a check next to **Catalog Records** and under that, select the third option **Replace all selected records**.

Figure 20-7
Pre-load
Information
about data



Choose "Collection" and enter "Hanley Family Collection". Using these settings, when you gather, all information for the Hanely Family Collection catalog records will be transferred. You could use the option *Replace only records with newer scatter data change date*, but by selecting only the Hanley Family Collection records you can ensure that changes made on the laptop will be applied even if someone on the main computer mistakenly edited a record from the Hanley collection.

Press **Prepare to Load** and the **Load Data Now** command button to complete the transfer.

EXAMPLE 3: SCATTER/GATHER WITH DATASETS

For this example, let's assume that you have PastPerfect installed on the main computer at your state park headquarters. You also have PastPerfect on computers located in twenty-five parks around the state. You want to maintain a database for all parks at the headquarters and each park wants to be able to add and edit data locally for their park.

Use the **Datasets** field of PastPerfect to identify the data for each park. To start, you will need to assign a dataset name to each park. The name of the park would probably work best. From the main menu, click on Setup | Authority Files and select Datasets to reveal the screen where you can add the names of each park. The same Dataset authority file should be used on all computers.

Now, staff at each park can start entering their own data. On the default data screen for each catalog (Objects, Archives, Photos, and Library), they should select the dataset name for their park. Then, whenever new catalog records are added, they will be assigned to the correct data set. A dataset can also be assigned to each Accession, Loan and Exhibit record.

When the local parks are ready to send their data to headquarters, they should open the Scatter Data screen and check all data types, then create the transfer disk and send it to HQ.

At the park headquarters, on the Gather screen select **1. Load all new records, images, and multi-media** and **2. Replace all existing records with scatter records regardless of change dates**. These settings will update all information from that park's scattered data onto the headquarters computer.

If you want each park to have data for all the parks included on their computers as well, you will need to Scatter/Gather the entire data set from headquarters to the parks. The easiest way to do this is to first send the data from the park to HQ as described above and then Scatter/Gather everything back to the park.

Now with all data at the park when you transfer data to HQ, you must use the **Replace selected records** option on the Gather screen and under **Rules for selection** choose to only load catalog and collection records with the dataset for that park.

As you can see there are many ways to use Scatter/Gather. It is very important that you make the correct selections to insure your valuable data is transferred

properly. If you have any questions about the correct settings for your application please contact our support office. Our staff will be glad to help.