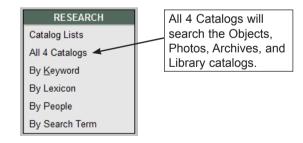
14

RESEARCH

Research is where all the hard work of cataloging pays off. Research allows you to develop insights and draw conclusions about your collections. PastPerfect can sort and organize your data in new and unexpected ways. If your catalog records have been entered carefully and consistently, you will enjoy performing searches of the collections.

Using the Research section on the Main Menu, you can access Catalog Lists, create queries using fields common to all four catalogs (Object, Photos, Archives, Library), and search by Keyword, by Lexicon, by People and by Search Term. You can also research records within each catalog by using the **Query** function in the Navigation Bar at the top of the Objects, Photos, Archives and Library screens.

Figure 14-1 Research Options on Main Menu



Once a catalog record or group of records is located through a search, you can view the catalog screens for each item, look at thumbnails of each item in a light box format, and print summaries, catalog cards, exhibit labels and detailed reports. There are also tools to export the results to MS-Excel and put the items on a Catalog List.

CATALOG LISTS

Through Research, you can take advantage of one of PastPerfect's powerful tools to use your collections data. Catalog Lists enables you to create artifact lists, then perform actions on all of the lists' items. For instance, you can put all list items on outgoing loan or exhibit, or change their locations. Catalog Lists allows you to manage lists through folders, make lists public or private, and lock lists so they may not be changed. You can add items to lists right from the Catalog Lists section or use any of the other five research options. Please see *Chapter 15 - Catalog Lists* for detailed instructions on creating and managing lists.

RESEARCH ALL CATALOGS

This section allows you to search all four catalogs at once using the fields common to all of the catalogs – Objects, Archives, Photos, and Library.

Actions Build Filter Statement Statt New Query Select Field, Condition, enter text in Value and press Add to Statement to build a filter statement. Seve Query Seve Recurds to List Seve Recurds View Results View Results View or Modify Filter Statement Syntax View Results View or Modify Filter Statement Syntax PrintExport List- Ouery Results Query Results Object D Dist Object D Object D Object Name Artist - Creator Title Description Clear Results Indude on Web Ouery History Query History Image: Clear C	Search All	Catalogs	5	Search	Catalogs: 🔽 Objects	Photos	Archives	Library
Save Query				ess Add to Statement to build a	filter statement.			
Save Query Save Query Save Results to List View Records View Records View Records View records View or Modify Filter Statement Syntax Delete Selected Filter Statement Line Clear Results Query Result	Retrieve Query	Field	Condition	Value				Match Case
Save Results to List: View Results View Records View Records<	Save Query		•	•			Add to St	atement
List View Results View Records View Records View records View or Modify Fiter Statement Syntax Delete Selected Fiter Statement Line Clear Results Outer Options Include on Web		Filter Statem	ent					
View Records View Images View Images View or Modify Filter Statement Syntax Delete Selected Filter Statement Line Clear Results Query Results Object D Object Name Artist - Creator Title Description Image: Strength Delete Selected Filter Statement Line Clear Results								
View Records View or Modify Filer Statement Syntax Delete Selected Filer Statement Line Clear Results Print/Export List Query Results Object D Object Name Artist - Creator Title Description Export to Excel Export to Excel Image: Clear Control of	View Results					Run Que	ery to Select Re	cords
Object D Object Name Artist - Creator Title Description Export to Excel Image: Clear Results Image:								
View or Modify Hiter Statement Syntax Usere Selected Filter Statement Line Clear Results Ouery Results Object D Object Name Artist - Creator Title Description Crear Results Object D Object Name Artist - Creator Title Description Indude on Web	E View Images							
Object D Object Name Artist - Creator Title Description Image: Description Image: Description Image: Description Image: Description Other Options Image: Description Image: Description Image: Description Include on Web Image: Description Image: Description Image: Description	yiew images		View or Modif	y Filter Statement Syntax Delete Se	elected Filter Statement Line	Clear Result	s	
FrintResults Export to Excel Include on Web	Print/Export List —				-			
Deter Options	🕼 Print Results	Object ID	Object Name	Artist - Creator	Title		Description	1 4
Include on Web	Export to Excel							
Include on Web	_							
Query History	Include on Web							
Image: Second								
■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■	Query History							
	Query History							
	Query History							
Click here to mark results for removal Remove Marked Records	Query History							

Figure 14-2 Search All Catalogs screen

To begin a search, click **All 4 Catalogs** in the Research section of the Main Menu. The Search All Catalogs screen will appear, as in Figure 14-2.

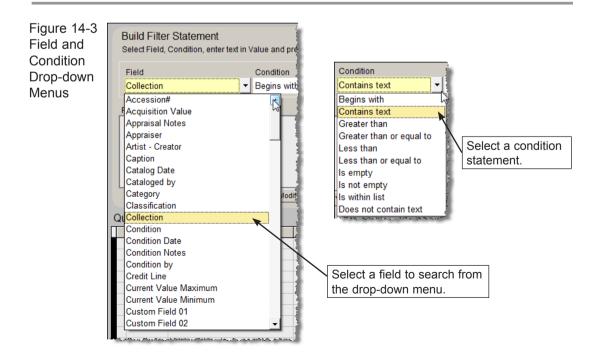
If you decide to limit your search by catalog, you can deselect catalogs by unchecking the boxes in the **Search Catalogs** section at the upper right of your screen. Only records from the checked catalogs will be included in your query results.

The Search All Catalogs screen enables you to build a filter statement from field and condition drop-down menus and using "and" and "or" operators to either narrow or expand the search.

To begin, choose one of the common catalog fields from the **Fields** drop-down menu. Then use the **Condition** drop-down list to pick "Begins with," "Contains text," "Greater than," "Greater than or equal to," "Less than," "Less than or equal to," "Is empty," "Is not empty," "Is within list," or "Does not contain text" to start the filter statement.

TIP

You may choose the fields that are available in the Field drop-down menu by going to the Main Menu | Setup | Query Fields section.



In the **Value** box to the right of Condition, enter the word or words (or dates, numbers, etc.) you want to find; capitalization is not important unless you check the **Match Case** box at the top right of the screen. Depending on the field being searched, you can access the authority file for that field. Please note the authority file icon in the upper right corner, which appears as a blue book with a prominent lower case "a" in front of it. You may right click in the value field or press **F7** on your keyboard to access the authority file.

Click on the **Add to Statement** button to add this filter statement to the query. If this filter is sufficient to find the data you need, click **Run Query to Select Records.**

In the example shown below, we searched the common field Collection for records that contain text "Rocky Pine Ranch Collection." The results were eight photographs, four objects, and two archival records.

Query						
Search All	Catalog	s		Search Catalogs:	✓ Objects ✓ Phenomena	otos 📝 Archives 📝 Library
Actions Start New Query		er Statement , Condition, enter text in Value and p	ent.			
Retrieve Query	Field Condition			lue		and O or Match Case
		-	-			Add to Statement
Save Query		_				
Save Results to	Filter Statem	ient				
List	Collection	Contains text-"Rocky Pine Ranch Co	ollection"			
			—			
View Results			The filte	r statement u	ised for	Run Query to Select Records
View Records						
			the que	ry appears he	ere.	
🔢 View Images		View or No.	diffy Eilter Statement Synt	ax Delete Selected Filter S	tatement Line	Describe
		View of Mo	dity Filter Statement Synt	ax Delete Selected Filter :	Clear	Results
Print/Export List	Query Resu	Its Matching records found = 14				
A Print Results	Object ID	Object Name	Artist - Cre		Title	Description
By Think Results	A 1995.1.4	Tape, Magnetic				r 1 hour audio tape containing the voices
Export to Excel	P 1999.1.1	Print, Photographic Print, Photographic		A Hilton W		Earl L. Hilton and Ernestine McMillan Hil
Eng Expertite Extern	P 1999.1.2	Print, Photographic Print, Photographic		Our Family		Earl L. Hilton and Ernestine McMillan Hil
	P 1999.1.3	Print, Photographic		Granny's		Lura Cox Hilton (Granny) feeding her ti
Other Options —	P 1999.1.4 P 1999.1.5	Print, Photographic			e Ranch Barn	Color photograph of the barn at Rocky
Include on Web	P 1999.1.5 P 1999.1.8	Print, Photographic		The barn Putting Up	11	The 1902 barn after being painted in 15 Earl Hilton driving the horse-drawn more
	P 1999.1.0	Print, Photographic		Mowing H		Earl Hiton Cutting hav with the new mc
Query History	P 1999.1.10	Print, Photographic		Hav Truck	ay	Three children pose on the front bump
	0 1999.1.11	Funnel		Granddad	e Funnel	White enamelware funnel with blue rim
	0 1999.1.12	Sifter, Flour		Flour Sifte		Tin flour sifter with painted green exter
	0 1999.1.13	Candlestick		Stag Cand		Cast bronze figural candlestick in the f
	0 1999.1.14	Quilt	McMillan, Lucinda	Lucinda Q		Hand sewn patchwork guilt made by L
	A 1999.1.15	Album, Autograph	monimum, coolinda			r Folded leather cover with 32 leaves. 1
	4					
	Click here t	to mark results for removal Remo	ove Marked Records	Click colu	mn header to change so	ort order Exit

Figure 14-4 Query Results showing filter statement

If additional conditions must be met to find the records you seek, do not run the query yet. Go back to the **Field** drop-down menu to select another field, choose a **Condition** from the drop-down list, and enter a **Value**. Now you must select an operator to connect both lines in the filter statement, either "and" or "or." Make your selection by clicking the radio button next to the appropriate option above the **Add to Statement** button. If you select "and," both conditions must be met for a record to appear in the results. If "or" is chosen, your results will contain records that meet either condition.

Once you have the field, condition, value and operator in place, click **Add to Statement**. Continue adding statements and choosing operators as needed. If you wish to remove a line of your filter statement, click on that line, then click the **Delete Selected Filter Statement Line** button, directly underneath the filter statements. When you have the entire filter statement created that will narrow the search, click **Run Query to Select Records**. If matching records are located, a list is displayed in a grid in the lower part of the screen as in Figure 14-4. If you decide to remove any records from the list, they may be marked for deletion by clicking in the far left column, then deleted from the list by using the **Remove Marked Records From List** button. This action only removes the items from search results. It does not delete records from the catalogs.

You may choose the fields that display in the Query Results by going to the Main Menu | Setup | Query Fields | Change Query Results Field List.

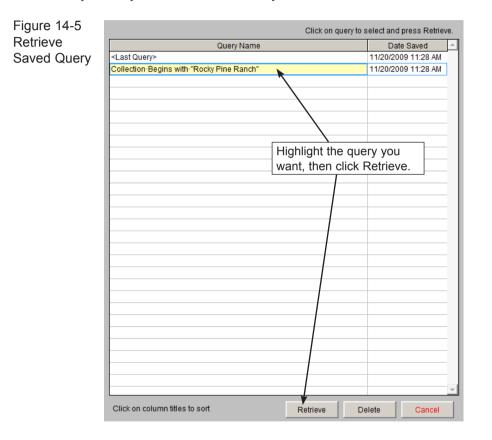
VIEWING, PRINTING AND ACTING ON SEARCH RESULTS

The Sidebar on the left has tools for saving, viewing, and printing your search results. You have many of these same tools for all search options. Below you will find explanations for how to perform these actions, whichever research option you choose.

In the All 4 Catalogs **Actions** section, you can start a new query or save and retrieve queries. You can also put the search results from all research tools on a Catalog List.

Start New Query - Click this button if you wish to start a new query and leave the current query. If you want to go back to a query and reuse it, please be sure to save that query before clicking Start New Query.

Retrieve Query - This option enables you to select a previously saved query from the list or the last performed query, seen in Figure 14-5. Once a query has been retrieved, you may run it as is or modify it and then run it.



Save Query - Clicking the Save Query button allows you to save a query for later retrieval. The filter statement is saved so you can rerun the query. You will be asked to give the query a name by which it will appear on the list of all catalog queries.

Save Results to List - You can add your search results to an existing Catalog List. Please use the Catalog List Manager to first create the list. Then perform a search from one of the Research options, and choose the Action **Save Results to**

List. Choose the list to which you wish to add your query results, then click **Add Selected Records to List**. You will be prompted with the number of records that will be added to the list. If a record in your query results is already on the list, it will remain on that list.

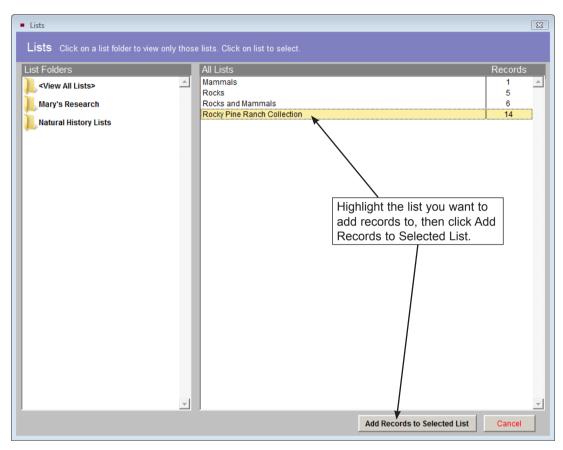


Figure 14-6 Save Search Results to a List

In the **View Results** section of the Sidebar, you can view the search results as full catalog records or in a light box format.

View Records - Use this button to view the catalog screens for each record in the search results. Most functions are available on the catalog screens, including displaying source information, editing data and attaching images. To return to the search, click the **Exit** button in one of the displayed catalog records.

View Images - The View Images option enables you to see an image thumbnail for each record in a light box format. If you wish to view the catalog record from the light box, click once on the thumbnail image. The View Image option is available when the MultiMedia Upgrade has been installed.

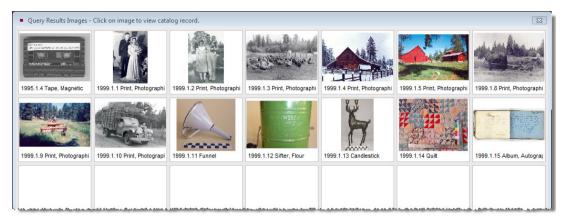
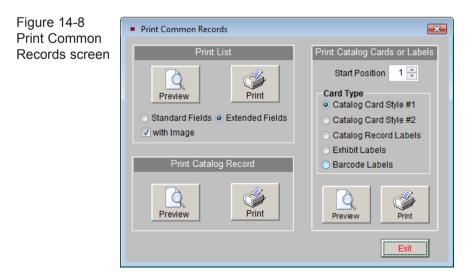


Figure 14-7 View Images of Query Results

The **Print/Export List** section has options for printing reports and exporting your results to MS-Excel.

Click Print Results to see the Print Common Records screen in Figure 14-8.



Print List - You can preview or print a list of all records that are in your search results. The list is either the Standard Fields or Extended Fields. The standard fields include Catalog, Object ID, Object Name, Description, Condition, Status, and Home Location. If you have attached digital images to the records using the optional MultiMedia Upgrade and wish to see thumbnail images on the report, check the "with Image" box. Please note that the Search Results Print List and Print Extended List are different reports when you include images.

Print Catalog Record - Prints the full catalog record of each of your search results, one record per page.

Print Catalog Cards or Labels - Allows you to print catalog cards, catalog record labels, exhibit labels, and barcode labels. Printing barcode labels is available when you have purchased and installed the Barcode Printing or Inventory Manager Upgrades.

The **Export to Excel** button in the Sidebar creates an Excel spreadsheet from the query results. Please specify an Export File Name and whether you wish to export the Standard Fields or Extended Fields. Standard fields include: Catalog, Object ID, Object Name, Description, Condition, Status, Home Location, and Imagefile Name, plus any other fields you have chosen to add to your All Catalogs Query Results Field List. Please see the tip later in this chapter for more information on how to change the Query Results Field List. If you choose to export Extended fields, the Excel file will contain all of the visible fields from your catalog records.

Figure 14-9 Export Query Results or List	Export Export Export Query Results or List to Excel	
to Excel	Export File Name PPSresults	Choose either Standard
	Include: Standard Fields Extended Fields	ields or Extended Fields.
	Export Now Cancel	

The file will open in HTML using your computer's MS-Excel. The file is saved in HTML (.htm) format and stored in the PP5Reports folder on your Local Disk drive (usually C). If you wish to save it as an XLS file, go to the Save As function in the Excel File menu and choose "Microsoft Office Excel Workbook" as the file type.

In the **Other Options** section of the Sidebar, you can include the query results records in a Web export to a PastPerfect-Online website and view a query history.

Include on Web - This option is available if you have purchased the PastPerfect-Online program. It enables you to add items in your query results to your Past-Perfect-Online site. All items in the results list will be included the next time you publish your data to the Web. For more information about PastPerfect-Online, visit the Products section of our website at www.museumsoftware.com.

Query History - This option gives you a list of the queries by date, user, what was searched for and numbers of records found in each catalog. If you have Security set up and activated with user names, you can see who has performed which queries. The list of queries may be previewed and printed.

If you do not wish to keep a complete list, you can mark queries for deletion and click **Delete Marked Queries**. You may also select queries to be deleted by date, by clicking the **Select Queries for Deletion by Date** button. You may enter a date, and queries older than that date will be deleted.

Date	User	Searched for	Archives	Library	Objects	Photos	Total
1/20/2009 11:30 AM Un	known	Collection Begins with "Rocky Pine Ranch"	2	0	4	8	14
9/21/2009 08:56 AM Un	known	Accession#-Begins with-"1"	3	8	17	9	37
8/06/2009 10:48 AM Un	known	People: Bortner, Frances	0	0	0	1	1
8/01/2009 01:12 PM Un	known	Accession#-Begins with-"1995"	1	0	0	0	1
7/31/2009 03:36 PM Un	known	Keyword Search for: hilto*	2	0	4	6	12
7/31/2009 03:08 PM Un	known	Collection Begins with "Rocky Pine Ranch Collection"	2	0	4	8	14
7/31/2009 02:39 PM Un		Track-Equals-2	1	0	0	0	1
7/21/2009 04:04 PM Un		Subject-Is not empty	1	0	0	0	1
7/21/2009 04:03 PM Un	known	Subject-Is not empty	1	0	0	0	1
5/29/2009 12:14 PM Un	known	Source-Contains text-"Hilton"-or	3	8	17	9	37
5/29/2009 12:14 PM Un	known	Source-Contains text-"Hilton"-or	3	8	0	9	20
5/29/2009 12:14 PM Un	known	Accession#-Begins with-"1"-or	3	8	0	9	20
5/29/2009 12:13 PM Un	known	Accession#-Begins with-"1"-or	3	8	17	9	37
5/12/2009 12:31 AM Un	known	Object Name-Begins with-"Letter"	3	0	0	0	1
5/12/2009 12:30 AM Un	known	People-Contains text-"bert"	0	0	0	1	
5/12/2009 12:29 AM Un	known	Kingdom Begins with "ani"	0	0	3	0	:
5/11/2009 11:40 PM Un	known	Acq Value-Greater than-100.00	0	0	4	0	4
5/11/2009 11:33 PM Un	known	People: Hilton, Richard L.	0	1	1	1	3
5/11/2009 11:32 PM Un	known	People: Bortner, William	1	0	0	0	1
5/11/2009 11:32 PM Un	known	Keyword Search for: washington	1	0	2	11	14
5/11/2009 07:23 PM Un	known	People-Contains text-"bert"	0	0	0	1	1
5/11/2009 07:09 PM Un	known	People: Hargity, Robert B.	1	0	0	0	1
5/11/2009 05:13 PM Un	known	Lexicon: Objname = Postcard	6	0	0	3	ç
5/11/2009 04:46 PM Un	known	Title-Contains text-"bern"	0	0	0	1	1
5/11/2009 03:54 PM Un	known	People: Clayton, Perry	0	0	0	2	2
5/11/2009 02:30 PM Un	known	Keyword Search for: babbitt	0	0	0	1	1
5/11/2009 02:23 PM Un	known	Kingdom Begins with "ani"	0	0	3	0	3
5/09/2009 11:58 PM Un	known	Object Name-Begins with "Book"	0	16	0	0	16
5/09/2009 11:58 PM Un	known	Object Name-Begins with "Book"	0	16	0	0	16

Figure 14-10 Query History screen

Additional helpful tools:

Remove Marked Records - Before you view, print, export or perform other actions on these query results, you can manually remove selected records from the results grid by clicking in far left column of the record to mark it. Then click **Remove Marked Records**.

Clear Results - Clears the search results, but leaves the existing filter statement. You can then add to or modify the filter statement and rerun the query.

RESEARCH BY KEYWORD

To access this search method, click on the **By Keyword** option in the Research section of the Main Menu. You will see the screen shown in Figure 14-11.

Keyword S	earch	Type of Search Any Word	All Words Search:	All Records	Objects 🔽 Photos 📝 Archives 🔽 Library
tions ave Results to ist ew Results View Records	agriculture Enter up to 5 v enter WORD*. Select from V	er keyword/s and click Start Sear vords, each separaled with a space Records will be selected if they co Nord List Sounds Like ults Records searched = 98 found	e. For a wildcard search ntain any of the words.	Start Search Now	The keyword search index must be rebuilt to include changes to the catalog data. Last rebuilt 11/20/2009 11:41 AM Rebuild Indexes Now
view images	Object ID	Object Name	Artist - Creator	Title	Description
	LA 1995.1.4	Tape, Magnetic		Oral History Tape of Ernestine McMillar	1 hour audio tape containing the voices of Ernestine
rint/Export List —	0 1997.3.1	Necklace			Beads recovered from grave site. Unglazed clay be
· · · · · · · · · · · · · · · · · · ·	P 1999.1.3	Print, Photographic		Granny's Turkeys	Lura Cox Hilton (Granny) feeding her turkeys in the
Print Results	P 1999.1.4	Print, Photographic		Rocky Pine Ranch Barn	Color photograph of the barn at Rocky Pine Ranch t
	P 1999.1.5	Print, Photographic		The barn	The 1902 barn after being painted in 1995.
Export to Excel	P 1999.1.8	Print, Photographic		Putting Up Hay	Earl Hilton driving the horse-drawn mower. The mo
	P 1999.1.9	Print, Photographic		Mowing Hay	Earl Hilton Cutting hay with the new mower purchas
	P 1999.1.10	Print, Photographic		Hay Truck	Three children pose on the front bumper of a fully-k
ther Options ——	0 1999.1.11	Funnel		Granddad's Funnel	White enamelware funnel with blue rim. Item has a
clude on Web					
uery History					
	H				
	H				
				1	

Figure 14-11 Keyword Search screen

The Keyword search is an indexed search, meaning PastPerfect creates a word list from the entries in the Archives, Library, Objects, and Photos catalogs. If you have made a lot of changes to the catalogs and have not rebuilt the word list recently, you should click **Rebuild Indexes Now** to rebuild the index. This will ensure that the word list reflects recent changes to the catalog data. The last date on which the word list was rebuilt will appear in the box just above the **Rebuild Indexes Now** button. Please note that while other users can remain in the PastPerfect program, the Keyword Search cannot be used by any other users while you are rebuilding. Rebuilding may take several minutes.

KEYWORD SEARCH MANAGEMENT

To increase the speed of searches and the time it takes to rebuild the index, you can select certain catalog fields to be included in the keyword search, rather than searching all fields. You can also create a list of common words like "and" and "the" that will be ignored. To make these changes, use the Setup drop-down menu from the Main Menu and select **Keyword Search**.

At the top of the **Setup Keyword Search** screen there are four radio buttons, one for each catalog. When you select the catalog, the list of fields available to be searched appears on the left side. Double click on a field to include it in the keyword search. The field will move to the **Fields to Include in Keyword Search** column. You can make all fields in that catalog available for searching using the button at the bottom of the **Available Fields** column. However, the fewer fields you include, the faster the rebuild process and the faster the searches. You may clear all the fields by clicking the **Clear List** button under the **Fields to Include in Keyword Search** column. Please be sure to set up your fields for each catalog.

On the right side at the top is a box listing valid characters that, in addition to the letters A through Z, you want to include in the keyword index. Characters other than the letters A through Z and those listed here will be ignored.

TIP

If you want to search dates using Keyword Search, you will need to enter the numbers 0-9 in the Valid Characters to Include in Keywords in Addition to A-Z box. Enter the numbers without any-thing between them, then rebuild the keyword index. Figure 14-12 shows this example.

There is also a box where you can list common words that should be excluded from the index. Words such as "and," "she," and "his" are so prevalent that including them would be meaningless. You may want to add common words specific to your organization, such as your organization's name. Enter the words separated by a comma, with no spaces as in Figure 14-12.

After creating the desired settings, click **Rebuild Indexes Now**. If you have a large number of catalog records, this function may take several minutes. Other network users will not be able to do keyword searches while the rebuild is in progress.

	Photos O Archives O Library	Valid Characters to Include in Keywords in Addition to A-Z 1234567890
Available Fields Accessories Appraisal Notes Assemblage Zone Chemical Composition Crystal System Current Value Maximum Current Value Minimum	Fields to Include in Keyword Searc Accession# Appraiser Artist 2 Bag Number Box Number Caption Cataloged by Category Classification Collector Condition Notes Credit Line Custom Field 01 Custom Field 04 Custom Field 05 Custom Field 06 Custom Field 08	Reset to Defaults Do Not Include These Words in Keyword List a.all.and.for.had.has.her.his.in.from.into.of.one.our.she.that.than.their the.them.there.then.these.they.this.two.was.were.when.with Enter words here that you do not want included in the Keyword Search. Reset to Defaults Rebuild Indexes Now View Index Keyword List
Search All Objects fields	Custom Field 09 Custom Field 10 Clear Objects List	- Exit

Figure 14-12 Setup Keyword Search screen

STARTING A KEYWORD SEARCH

To start a new search, click **By Keyword** in the Research section of the Main Menu and type up to five words in the box on the upper left-hand side of the Keyword Search screen. To select a word from the word list, click on the **Select from Word List** button. The word list will appear, and you can double click on a word to select it. If you are not sure the word you have selected is the correct word, you may click the **Sounds Like** button to view a list of words similar to the word you have selected.

If you enter more than one word, you will also need to select your **Type of Search** at the top of the screen. If you choose **Any Word**, PastPerfect will look for records where any of the words appear. Not all the words will need to appear on the record for it to be selected. If you choose **All Words**, PastPerfect will look for records that contain all of the words. If a record does not contain all the words, then it will not be displayed in the query results. If you are looking for a specific phrase, you want to use the All Words option.

If you need to use a wildcard character, you may use an asterisk (*) at the end of the word. Putting the asterisk at the end of the word, such as "camp*" will search for any word that begins with "camp." These words may have various endings, such as "camping" or "camps."

You may choose to search all catalogs, or select the catalog(s) you wish to search by clicking the check box next to the catalog at the top right of the screen. See the Search section in Figure 14-11.

For your initial search, you must choose **All Records** to search through all records in the selected catalogs. After you perform your search, you may run another search on just the resulting records by selecting **Results Only**. Next click the **Start Search Now** button. The search will begin running and the results will appear in a grid on the bottom of the screen.

When the search is complete, the number of records searched and found will display just above the Search Results grid. The options described earlier in this chapter are now available: Save Results to List, View Records, View Images, Print Results, Export to Excel, Include on Web, Query History, Delete Marked Records, and Clear Results.

RESEARCH BY LEXICON

Click on the **By Lexicon** button in the Research section of the Main Menu to search for items with a specific object name. The Lexicon search has access to all four catalogs: Objects, Photos, Archives, and Library. You may narrow your search by unchecking the boxes next to the catalogs you do not want included. The Lexicon can be searched two ways – either using the Hierarchical Listing of Terms or the Alphabetic Listing of Terms. Make your selection by clicking the radio button at the bottom of the Search by Lexicon screen.

HIERARCHICAL LISTING OF TERMS

The Hierarchical Listing of Terms is designed to help you find the object name within the context of a Category, Classification or Sub-Classification. This search can be helpful if you have an idea of the type of item you are trying to find, but you do not know the specific object name.

arch by l	_exicon		Search Catalogs:	✓ Objects ✓ Photos	🗸 Archives 🛛 🗸 Library
s	To start a search, sele	ct a Category, Classification, S	ub-Classification or Term		
Results to	Category		ification	Sub-Classificati	ons
	6: Tools & Equipment for C	ommunication - Written	Communication T&E	▼ Writing Media	
esults	Classification	Sub-Classification	Primary Term	Secondary Term	Tertiary Term
	Written Communication T&E	Writing Media	Book, Writing		
ew Records	Written Communication T&E	Writing Media	Book, Writing	Blankbook	
	Written Communication T&E	Writing Media	Book, Writing	Blankbook	Book, Composition
ew Images	Written Communication T&E	Writing Media	Book, Writing	Blankbook	Notebook
	Written Communication T&E	Writing Media	Book, Writing	Notepad	
	Written Communication T&E	Writing Media	Book, Writing	Notepad	Notepad, Adhesive
port List —	Written Communication T&E	Writing Media	Book, Writing	Notepad	Pad, Flip Chart
nt Results	Written Communication T&E	Writing Media	Book, Writing	Notepad	Pad, Legal
in Nesuns	Written Communication T&E	Writing Media	Card, Index		
	Written Communication T&E	Writing Media	Label		
ort to Excel	Written Communication T&E	Writing Media	Label	Tag	
	Written Communication T&E	Writing Media	Notecard		
	Written Communication T&E	Writing Media	Paper		
Options	Written Communication T&E	Writing Media	Paper	Paper, Adhesive Note	
	Written Communication T&E	Writing Media	Paper	Paper, Carbon	
	Written Communication T&E	Writing Media	Paper	Paper, Copy	
History	Written Communication T&E	Writing Media	Paper	Paper, Onionskin	
listory	Written Communication T&E	Writing Media	Paper	Paper, Staff	
	Written Communication T&E	Writing Media	Paper	Paper, Typing	
	Written Communication T&E	Writing Media	Paper	Paper, Writing	
	Written Communication T&E	Writing Media	Paper	Stationery	
	Written Communication T&E	Writing Media	Postcard		
	Written Communication T&E	Writing Media	Postcard	Postcard, Picture	
	Written Communication T&E	Writing Media	Tablet, Writing	· · · · · · · · · · · · · · · · · · ·	
	Written Communication T&E	Writing Media	Tablet, Writing	Chalkboard	
	Written Communication T&E	Writing Media	Tablet, Writing	Slate, Writing	
	Written Communication T&E	Writing Media	Tablet, Writing	Whiteboard	
	Hierarchical Listing of T	erms 🔿 Alphabetical Listing of Term	15	Start New Query	Run Query to Select Records
	C			oran i vew ordery	nun query to select necorus
					Exit

Figure 14-13 Hierarchical Listing of Terms Search

For example, if you want to search for items that were used for sending correspondence by mail, select the Lexicon Category of "6: Tools & Equipment for Communication" by clicking on the down arrow next to the **Category** field and selecting that category. The list below will display all items in that Category. You may then select the **Classification** of "Written Communication T & E" and the **Sub-Classification** of "Writing Media." The list of terms will display only those items within the selected Classification and Sub-Classification. You will see terms listed at the Primary, Secondary and Tertiary levels. For this example, click on "Postcard" in the Primary Term level to search for all postcards in the collection, as in Figure 14-13. Then click **Run Query to Select Records** at the bottom of the screen. The search will begin running and the results will appear in a grid on a new screen, seen in Figure 14-15.

ALPHABETICAL LISTING OF TERMS

If you know the object name you want, using the Alphabetical Listing of Terms may be easier for you, as you may select the object name from a list without choosing a Category and Classification.

Query						
Search by	Lexicon	Search Catalogs:	Objects	Photos	Archives	Library
Actions						
Save Results to	Select Object Name					
List	Post					
	Post, Aiming					
View Results —	Post, Binding					
View Records	Post, Croquet					
	Post, Dental					
F View Images	Post, Fence					
	Post, Gate					
	Post, Hitching					
Print/Export List —	Post, Observation					
🚑 Print Results	Post, Scratching					
	Post, Tennis					
Export to Excel	Postcard					
	Postcard, Picture					
	Poster					
Other Options	Poster, Instructional					
·	Poster, Music					
	Poster, Political					
Query History	Poster, Theater Posturometer					
Query History	Posturometer					
	Pot, Chamber					
	Pot, Chimney					
	Pot, Chocolate					
	Pot, Crab					
	Pot, Fish					
	Pot, Fondue					
	Pot, Glue					
	Pot, Jam					
	But i shata					
	O Hierarchical Listing of Terms Alphabetical Listing of Terms 			F	Run Query to Sel	ect Records
						Exit

Figure 14-14 Alphabetical Listing of Terms Search

Click the radio button next to **Alphabetical Listing of Terms** to view the list of all object names in alphabetical order. For ease in navigating the list, click once on any term, then quickly type the first couple of letters of the term for which you are searching. For example, if you know you want to find the postcards in the collection, start typing the letters "POS" quickly. Highlight the term Postcard, as in Figure 14-14, then click **Run Query to Select Records**. The search will run and the results will appear in a grid on a new screen, seen in Figure 14-15.

TIP

Please note that object terms appear in inverted word order. If you are searching for the object name "legal pad," it is listed as "pad, legal." You would type "PAD," rather than find it under "legal."

Search by	Lexicon		l	Search	Catalogs: Objects Photos Archive	es 🔽 Library
ctions	Query Resu	lts Objname = Pos	stcard. Records searched=102 found	=9		Start New Query
Save Results to List	Object ID	Object Name	Description		Title	Date
_151	P 2000.2.6	Postcard	Outdoor photograph of woman sitting on	chair with	Sunday Afternoon	1900
	P 2000.2.9	Postcard	Photo postcard of a young girl. The card	l has an illu	Regards From Betty	1915
iew Results ——	P 2000.3.3	Postcard	Group portrait of 8 young women. They	are the 190	Graduate Nurses	05/28/1909
View Records	A 2000.2.7	Postcard	This is a WWI era postcard. This postca	rd was ma	I'm training for this	06/05/1918
<u> </u>	A 2000.2.1	Postcard	Christmas greeting postcard illustrated w	rith a winde	Wishing you a joyous Yule-tide	1927
View Images	A 2000.2.2	Postcard	New Year postcard illustrated with golde	en horsesh	With wishes for a happy New Year. PAX	1911
view intages	A 2000.2.3	Postcard	Christmas greeting postcard. Illustration	of snow c	CHRISTMAS GREETINGS	1912
	A 2000.2.4	Postcard	Christmas greeting postcard. Illustration	of fireplace	To YouMerry Christmas May your stocking be filled with many	y 1915
rint/Export List —	A 2000.2.5	Postcard	Christmas postcard. Illustration of pointse			1915
🚭 Print Results	H					

Figure 14-15 Lexicon Search Results for Postcard

When matching records are located, you have all of the options described earlier in the chapter for saving the results to a list, as well as viewing and printing records.

RESEARCH BY PEOPLE

The People field appears in all four catalogs and is used to identify people who appear in photographs or are associated with archival materials, objects or library books. When entering peoples' names in the catalog records, they should be entered in the format Last name, First name. Separate each name with a carriage return. When the record is saved, PastPerfect will automatically add the names to the People authority file.

The Research **By People** screen will display the People authority file. This authority file appears as a rolodex with columns for names and numbers of times the name appears in each of the four catalogs.

Search by						
ctions Bave Results to List	Select a tab, then double click on a name to view the associated catalog records. People:			Ne	ew Sear	ch
iew Results ——		UV	w ×	Y	z	?
View Records	Appearances in:	Photos	Objects	Archives	Library	·
	Hanley, Clair Norton	1	1	0	0	^
View Images	Hanley, Helen Torgeson Hanley, Warren T.	1	0	0	0	
Biography Info 🏾 🗕	Hargity, Juneau	0	0	1	0	
siography mio	Hargity, Robert B.	0	0	1	0	
	Hearn, Bert	1	0	0	0	
int/Export List —	Hilton, Earl L.	4	0	0	0	
Print Results	Hilton, Earl L. Jr. Hilton, Ernestine McMillan	2	0	0	1	
	Hiton, Jerold L.			0	0	
Export to Excel	Hilton, Lura Cox	1	3	1	Ő	
	Hilton, Nancy L.	1	0	0	0	
ther Options	Hilton, Richard L.	1	1	0	1	
clude on Web	Hoover, Herbert	0	0	1	0	
ICIUDE OIT WED						
uery History						



To view the catalog records associated with any of the names on the list, double click on the name.

uery					
Search by	People				
ctions					
Save Results to					New Search
ist	Query Resu	Its Records searched=98 found=4	1		
	Object ID	Object Name	Artist - Creator	Title	Description
iew Results —	P 1999.1.1	Print, Photographic		A Hilton Wedding	Earl L. Hilton and Ernestine McMillan Hilton stand in f
View Records	P 1999.1.2	Print, Photographic		Our Family	Earl L. Hilton and Ernestine McMillan Hilton standing
	P 1999.1.8	Print, Photographic		Putting Up Hay	Earl Hilton driving the horse-drawn mower. The mo
View Images	P 1999.1.9	Print, Photographic		Mowing Hay	Earl Hilton Cutting hay with the new mower purchas
•• view images					
Biography Info					

Figure 14-17 Search by People Results

When the search is complete, all of the viewing, printing, and exporting options are available. An additional button titled **Biography Info** is included in the View Results section of the Sidebar. If biography information has been entered in People Biographies for the name searched, a green data light will appear on this button. For more information on the People Biographies screen, please see *Chapter 16 - People & Sites*.

 People Biographies 		3
H A P N	Image: Book and the second	•
Screen View Biographical Info • Catalog Records • 0 Custom Actions	Hilton, Earl L. Role rst Name Earl L. Last Name Hilton Spouses Ernestine Isadora McMillan A Bom 08/09/1922 Where Washtucna, Washington	
Change Full Name	Died Where Image Management	4
Remove Unused Names	Children Mother Lura Cox Hilton Earl Lavene Jr. 1944 Father Clarence Lester Hilton Nancy Louise 1946 Richard Lester 1948 Jerold Loren 1950	
	ublications Occupation, Sphere of Activity	
	ducation Titles and Honors	
	telationships Notes	4
	▲ Earl L. Hilton served in the armored tank division in WWII in ▲ Europe.]
	laces and/or Geographical Areas of Residence	
	스 ·	
Record 2 of 69	Include in Web Export Updated by Unknown Updated 12/03/2009 11:34 A	м

Figure 14-18 People Biographies

People Biographies may also be accessed from the **People & Sites** section on the Main Menu. Instead of using Research | By People, you can use People Biographies to perform searches. By clicking the **Find** button in the top Navigation Bar, you can locate People by the following fields: full name, last name, first name, other name, birth date, birth place, death date, death place, father and mother.

RESEARCH BY SEARCH TERMS

The Research **By Search Term** method is designed to provide an access point into your catalog records that is based on terms created by and for your particular institution. For example, if your institution is a local historical society, your search terms may be family names or local places of importance. PastPerfect automatically creates the Search Terms authority file based on the entries in the catalogs' Search Terms field. By clicking **By Search Term** in Research, the Search Terms authority file will be displayed on the screen.

earch by	Search Term						
tions	Double click on a Search Term to view the associated catalog records.			Ne	w Seard	n	
ət	Search Terms:	Appearances in:	Photos	Objects	Archives	Library	
View Records	Adams Family Auden Family Babbit Family		1 1 1	0 0 0	0 0 0	0 0 0	4
View Images	Carter Family Clayton Family Hanter Family		9 2 8	1 0	0 0 5	0 0	1
nt/Export List —	Hilton Family Hopalong Cassidy		6 0	0	0	1	J
) Print Results	McMillan Family McWilliams Family Repatriation		1 6 0	2 0 1	2 1 0	0 0 0	
Export to Excel	Rocky Pine Ranch Washington Family		6 3	3	2	1 0	
ner Options	World War I World War II WWII		0 6 6	0	0 4 4	0 0	
Jery History						, in the second s	

Figure 14-19 Search by Search Term

The search terms are listed on the left half of the screen and the numbers of appearances in each catalog are listed on the right. To begin a search, double click on an entry on the list.

The search results will display on the screen as shown in Figure 14-20.

)uery							
Search by	Search ⁻	Term					
Actions Save Results to List	Query Resu	Its Records searched=102 fo	pund=13		New Search		
	Object ID	Object Name	Artist - Creator	Title	Description		
/iew Results	A 2003.1.2	Series, Archival		Hanley Correspondence	3 Letters		
View Records	A 2003.1.3	Letter	Hanley, Harold W.	Letter from Major Harold W. Hanley to \	Letter from Major Harold W. Hanley to I		
	P 2003.1.4	Print, Photographic	Hanley, Clair N.	Crew of the P.I.B.	Crew of the Old "01" U.S.S. PC (C) 160		
View Images	A 2003.1.5	Letter	Hoover, Herbert	Letter to Warren T. Hanley from Herbei	A one-page letter, typewritten, from He		
	P 2003.1.6	Print, Photographic	Hanley, Clair N.	Japanese Plane at Luzon Airfield	An American naval officer, Jack Tangr		
	P 2003.1.7	Print, Photographic	Hanley, Clair N.	Sailors	Unidentified crewmen aboard the U.S.S		
Print/Export List —	P 2003.1.8	Print, Photographic	Hanley, Clair N.	Gunner	Gunner at battle station on the 1601.		
Print Results	P 2003.1.9	Print, Photographic	Hanley, Clair N.	USS Fierce	The U.S.S. PC (C) 1601 coming into an		
	P 2003.1.10	Print, Photographic	Hanley, Clair N.	Officers of the 1601	Officers of the "1601" known to its cre		
Export to Excel	P 2003.1.11	Print, Photographic	Hanley, Clair N.	The Invaders	Crew member from the "1601" in village		
	A 2003.1.12	Letter	Hanley, Warren T.	Letter from Warren T. Hanley to his sor	A one-page letter, from Warren T. Han		
	A 2003.1.14	Discharge, Military		Thanks of a grateful nation	Three certificates dealing with Clair Ha		
Other Options	P 2003.1.16	Print, Photographic	Unknown	Blushing Bride	Lt. Clair Hanley and his bride, Helen. 15		
Include on Web							
Query History	H						

Figure 14-20 Search by Search Term Results

When your search results appear, all of the options for saving as a list, viewing, printing, and exporting are activated as seen in Figure 14-20.

QUERY IN INDIVIDUAL CATALOGS

You can also search each catalog (Objects, Photos, Archives, Library, and Contacts) independently. These searches can be done within the catalog screen by pressing the **Query** button in the Navigation Bar. These single catalog queries are identical to the All Catalog queries described above, except that all fields within that catalog are available for searching, not just the fields common to the four catalogs.

The first step is to use the **Field** and **Condition** drop-down menus and enter a **Value**. Click **Add to Statement** to begin creating the filter statement to select records. Add additional filters to the statement as required, and click **Run Query**

to Select Records. The Query Results will appear in a grid on the bottom half of the screen. You then have all the options for saving, viewing, printing and exporting the results.

You may choose the fields that are available in the Field drop-down menu and in the Query Results by going to the Main Menu | Setup | Query Fields section.

QUICK FIND

The **Quick Find** button allows you to search for a particular Object ID or Contact ID number right from the Main Menu. This feature is especially helpful if you know the Object ID number of the item you want to find, but you are not sure in which catalog the item is located. The Quick Find will search through the Objects, Photos, Archives, Library and Contacts catalogs.

To begin your search, click the **Quick Find** button on the Main Menu. Enter the Object ID or Contact ID number you are looking for in the blank line. Or, if you have a barcode label printed with the Barcode Printing or Inventory Manager Upgrades, scan the barcode with a barcode scanner. Check the box or boxes for the catalogs you want PastPerfect to look in for the number. Then click **Find**.

Figure 14-21 Quick Find screen



When the record is found, the catalog containing that record will be opened and the item's record will appear on the screen. You can begin working with that record and continue to work in that catalog, the same as if you had opened the catalog directly from the Main Menu.