

PastPerfect Software for Museum Collections

Version 5 User's Guide

3rd Edition

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PastPerfect Software, Inc.

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INTRODUCTION TO PASTPERFECT

Welcome to PastPerfect Museum Software version 5.0. This program conforms to the latest standards for cataloging archive, library, historic object, art object, natural history, archaeology, and photograph collections. By following this manual and using the provided catalog data fields, you will be able to start cataloging your collections immediately. For those of you who are upgrading from version 4.0, we think you will be pleased with the numerous enhancements. For more information on what is new in version 5.0, please see *Chapter 1 - Installation and Upgrade*.

PastPerfect has become the most widely used museum collection management software, with thousands of organizations using it worldwide. It handles accessions, descriptive cataloging, loans, exhibits, capital campaigns, membership development, pledges, dues, donation receipts, research, lexicons, and reports. The creators of PastPerfect are confident that it will be a reliable, accurate, consistent, and friendly addition to your museum staff. Trust PastPerfect to help you achieve better collections and contacts management.

COLLECTION MANAGEMENT

PastPerfect was designed for the quick and easy entry of your catalog records, with four separate catalog screens designed specifically for objects, photographs, archives, and library collections. Each screen provides the data fields you need to create your records. Custom fields in each catalog enable you to capture additional information for your institution's collections.

- The **Objects catalog** has over 250 data fields that allow you to enter detailed information about each artifact. The fields include Object ID, Object Name, Collection, Source, Material, Site Name, Permanent and Temporary Locations, Provenance, Detailed Description, Dimensions, Place of Origin, Early and Late Dates, Condition, Status, Maintenance Cycle Information, Appraisal History, and Detailed Notes. You may catalog art, archaeological artifacts, natural history, history, or geology objects in this catalog.
- The **Photos catalog** allows you to record information about each item in your photograph collection, including Photographer, Studio, Title, Film Size, Print Size, Place, People, Description, Classification, Event, and Copyrights.
- The **Archives catalog** allows you to record information about document collections, manuscripts, oral histories, maps, music collections, and personal papers. Data fields include Title, Creator, Dates of Creation, Dates of Accumulation, Abstract, Administrative/Biographical History, Storage Location, Container List, Access Conditions, Finding Aids, System of Arrangement, and Notes.
- The **Library catalog** allows you to record information about published materials such as books, pamphlets, and magazines. Data fields include Call#, Title, Author, Subjects, Publisher, Series, Edition, LCCN, and ISBN.

PastPerfect provides authority files for over 100 data fields, including Collection, Material/Medium, Place, Home Location, Artist Name, Photographer, Subjects, People, and Search Terms. Authority files ensure that your staff is entering consistent and accurate information. For added control you can select some or all of your authority files to be verified, which means only approved terms from the authority file may be used on the record.

For each catalog there is an associated default data record. Data entered on the default record may be used to pre-fill catalog fields when adding new records. You may also choose Fill with Current Data, which fills in all of the information from the record showing behind the Add New Catalog Record screen. This allows quick and easy input of similar or identical objects.

- The **People Biographies** and **Sites & Localities** sections contain fields to help you provide context to your collections. People Biographies captures names, places of birth and death, dates, parents, spouses, children, education, achievements, occupation, places of residence and relationships for those who used,

owned and collected items. Sites provides information about the locations from where items have been collected. You can then find all items associated with a person or site.

PASTPERFECT LEXICON

Museum nomenclature is a structured and controlled list of terms organized in a systematic hierarchy that can be used for indexing, cataloging, and researching collections. The most important reason for using an established nomenclature is that it allows researchers and curators to have a consistent naming convention for objects. A well-conceived lexicon system allows institutions to share meaningful information.

PastPerfect's Lexicon is based on the latest standard, *Nomenclature 3.0 for Museum Cataloging*, edited by Paul Bourcier, Ruby Rogers and the Nomenclature Committee. *Nomenclature 3.0* is expanded from the previous version and includes thousands of new and up-to-date terms. This classification system is a hierarchical grouping of like items. The categories, classifications and terms are organized by object function. PastPerfect checks new object names against this approved list to make sure your data entry is consistent. PastPerfect is, however, completely flexible in allowing you to revise and add to the Lexicon to fit your organization's particular needs.

TEMPORARY CUSTODY

Temporary Custody is designed to help you record and retrieve source information for potential accessions and create temporary custody documents. It automates tracking important information about incoming items and their source prior to your museum's decision whether or not to accession the items. It also prints a receipt, thank you letter and envelope for the potential donor and tracks the eventual disposition of items, whether they will be returned to the source or accessioned as part of the collection.

ACCESSION RECORDS

Accurate and complete accession records are the cornerstones of museum collections. With PastPerfect, you may enter complete information about each new accession, including donor name and address, date received and accessioned, names of staff who received and accessioned items, and credit line. You can also specify the type of acquisition, such as gift, bequest, purchase, transfer, or exchange, and track activities throughout the accession process.

Every item in your collection is linked to its source information by its accession number. The Accession section gives you the option of entering items from the Accession screen at the time the accession is registered. Once this is done, you may go to the catalog screen and enter detailed descriptive data for each item. Or you can go right to the catalog, add the item, and link it to its Accession record using the accession number. Either way, you will have instant access to detailed information about items and how they were acquired. Another great advantage of PastPerfect's Accession section is that it generates an Accession Form, Deed of Gift, thank you letter and envelope with just a few mouse clicks.

EXHIBITS

Detailed information can be recorded about your exhibits, including exhibit name, location, duration, staff required, climate control, and visitor traffic. Each item placed on exhibit is flagged so that you can view the detailed Exhibits screen directly from the catalog. A history of exhibits is maintained as well as an exhibit history for each item. PastPerfect also includes an option to print exhibit labels for each item.

LOANS

PastPerfect will track both incoming and outgoing loans. For incoming loans, you can record the lender's contact information, instructions, restrictions, credit line, shipping and insurance information, as well as a description and purpose for the loan. PastPerfect will generate a loan form and loan conditions.

The Outgoing Loans catalog tracks the borrowing institution, out and due dates, shipping and insurance information, purpose, and loan terms. You can then print a loan form to present to the borrower. Each item that is on loan is flagged so you can easily access the Outgoing Loans screen directly from the catalog record. A loan history is maintained for all items that have been part of each outgoing loan.

DEACCESSIONS

PastPerfect provides a way for you to record items that have been deaccessioned. You can either flag a record using the Status field within the catalog record or remove the item from the catalog into the Deaccessions catalog, while preserving much of the detailed information. The Deaccessions screen contains data from the item's catalog record and enables you to describe the deaccession reason, date, disposal information, and staff authorization. *Chapter 5 - The Accession Process* contains instructions for this process.

RESEARCH

The Research section of PastPerfect provides staff and visiting researchers with a variety of search methods and access points. Queries may be built on selected fields in the Objects, Photos, Archives, or Library catalogs or on common fields in all catalogs. Keyword searches can search for a term or phrase in all fields, or in fields you select. You may also search for appearances of specific people depicted in photos or associated with other items in the collection. You can also create a list of frequently searched terms, and provide instant access to collections for the most popular topics. The search results may be put on a Catalog List, viewed as full catalog records or images in a light box, exported to MS-Excel, and printed to a variety of report formats.

CATALOG LISTS

PastPerfect's Catalog Lists is a powerful new tool that enables you to create and manage lists of items, view and print lists, and perform actions on lists' items.

Lists may be generated through the query builder in the Catalog Lists section or you can use any of the other Research options. You can also build catalog lists by placing items on lists right from individual catalog records.

Once a list is created, you can put all items on exhibit or outgoing loan, change locations, perform a global update, relate all items, and select all items for Web publishing using PastPerfect-Online.

CONTACTS MANAGEMENT & CAMPAIGNS

The Contacts section automates tracking donations, pledges, in-kind gifts, and volunteer hours and handles every aspect of membership coordination, including dues payments, receipts and renewals. PastPerfect's contact management system helps you create and print letters, mailing labels and emails, and track detailed information about individuals, companies, volunteers, docents, and prospective members. The Campaigns section lets you create, manage, and track capital campaigns and fundraising events for your organization.

REPORTS

Reports can give you new and unexpected insights about your collections and patrons. PastPerfect comes with over 300 customizable reports. They cover every aspect of the data, including accessions, catalogs, exhibits, loans, research, contacts, dues and donations. Most standard reports allow you to select the records that appear on the report based on ranges of information that you designate. The layout of all reports may be modified to your specifications. PastPerfect saves two custom layouts as well as the standard layout.

PastPerfect also provides a powerful Report Maker tool which allows you to design and save custom reports based on your own queries of the databases. Report Maker uses the same straightforward tools used throughout the program to select records. You will recognize the drop-down menu format from the Research, Catalog Lists and Contact Lists sections. Report Maker helps you easily summarize the data you find, and calculate totals, averages, counts, and more.

Report Maker can display results in the form of reports, tables and Excel spreadsheets. When you output the query to a report, Report Maker helps you modify the page layout and allows you to preview the results on-screen before printing. The modified report form is saved as part of the query for future use.

In PastPerfect, you can set all reports to produce multiple output options, including to a local or network printer, PDF, MS-Word, HTML or plain text. PastPerfect saves the report on your local drive for future access.

SECURITY & PASSWORD PROTECTION

PastPerfect contains a password protection system that helps ensure the integrity and security of your collections. Your data is a valuable asset to your museum and must be protected. There are also sensitive areas that you may not wish to make available to all users. Through PastPerfect Security, you decide who has access to various levels of information. For example, you may wish to restrict data entry workers from having access to membership files, or you may allow researchers to view the collections without the ability to add or edit records. PastPerfect gives you the flexibility to decide, on a case-by-case basis, the level of security clearance to allow.

SETUP

The Setup screens enable you to build authority files, compose default letters, and select settings that will streamline your use of PastPerfect. You can make fields available for browsing, searching and reporting, name custom fields, set up programmable function keys, activate Security, and select workstation and system settings. The Setup menu is a great place to get started.

BACKUP

Making frequent backups is the way to ensure your data is safeguarded in case of catastrophic computer failure. We recommend that you make a backup every day you work in the software. PastPerfect makes it easy to back up data to your

local hard drive and to external media, such as a CD, DVD, flash drive, or external drive. Keeping progressive backups off site is strongly suggested. Hopefully they will never be needed, but they could save you thousands of hours of work. Backup screens are opened from the Main Menu for easy access. PastPerfect also has a built-in reminder as you exit the program if you go more than a week without making a backup.

Reindex is also available from the Main Menu. Please perform reindexes as directed by the program or one of the PastPerfect support staff.

UTILITIES

The Utilities menu provides access to Global Update, Import, Export, Recycle Bin, and Restore Backup functions, as well as System Information. Global Update allows you to find and replace data in fields. You may import data from FoxPro, dBase, Excel and ASCII formats to create new records. PastPerfect enables you to export data from catalogs to FoxPro, dBase, Excel, ASCII, XML, Dublin Core XML and Microtext. The Recycle Bin allows you to view records that have been deleted and recover them, if desired, before reindexing. System Information contains program and data versions, installed upgrades, numbers of records, and computer hardware information.

ABOUT THIS MANUAL

This User's Guide will provide instructions for installing and using PastPerfect Museum Software. It includes step-by-step procedures that will walk you through many features and functions of the program. Each chapter contains detailed directions and definitions to help you make the most of PastPerfect. We are confident that when you read this User's Guide, you will be in command of everything you need to know to make PastPerfect Museum Software work for you.

PRODUCT UPGRADES & OPTIONAL FEATURES

Optional add-on upgrades are available to be purchased at any time. Pricing information for the upgrades is available on our website www.museumsoftware.com.

MULTIMEDIA

With the optional MultiMedia Upgrade, you will be able to attach digital images and link multimedia files to your records. Images may be attached to catalog records as well as condition reports, exhibits, sites, people biographies and contacts. Multimedia files can include digital audio, digital video, Web pages, MS-Word documents, MS-Excel files, PDF files, or any other file your computer can open. Multimedia files may be linked to the catalog and accession records, exhibits, sites and contacts.

NETWORK OPERATION

PastPerfect may be installed on peer-to-peer or client/server networks, allowing all users to share the most up-to-date data. For PastPerfect to operate as a network program, you will need Windows Networking and a network throughput of 100 Mbps. You will also need to purchase the optional PastPerfect Network Upgrade for proper licensing. To optimize performance, PastPerfect allows you to install the program on each licensed workstation and share access to common data files residing on the main computer or network file server.

BARCODE PRINTING

You may add the capability of printing barcode labels to your PastPerfect system. Barcode printing is a proven technology that can eliminate keyboard data entry errors. Barcode printing has many possible applications in the museum setting, from artifact marking and tracking to inventory control.

INVENTORY MANAGER

The Inventory Manager Upgrade gives you an easy-to-use and affordable tool to help you accomplish successful collections tracking projects. You can create inventory lists, print barcode labels, track collections electronically, and ensure accurate records. Inventory lists can be generated randomly or automatically

based on catalog, status, or last inventoried date. You can even scan barcodes or create a list of Object IDs with a laptop, tablet, or smartphone. Once your list is created, you can globally update inventory information, change home or temporary locations, and maintain an inventory history.

VIRTUAL EXHIBIT

Virtual Exhibit allows you to convert catalog records and images stored in PastPerfect to HTML for posting on the Web. This add-on package provides you with the flexibility to design a collections-based website using Cascading Style Sheets (CSS) that reflects your institution's personality. Virtual Exhibit automates the work but allows you to personalize the home page, screen color, font size, and image sizes for your website. You select the records and data fields from PastPerfect's Objects, Photos, Archives, and Library catalogs to highlight in virtual exhibits.

PASTPERFECT-ONLINE

PastPerfect-Online is both a tool to create searchable HTML Web pages and an online hosting service. You can use PastPerfect-Online to create a fully searchable online catalog from your PastPerfect collections records and images. Built on MWeb™ technology, this product is capable of displaying hundreds of thousands of catalog records. It comes with an easy-to-use wizard that helps you set up research tools such as searches by keywords, random images, and up to 15 search categories. PastPerfect-Online includes design options to help you build a site that complements your existing website. You may also activate a monthly visitor search statistics report, Web-based email forms for feedback, image copy requests and sharing links, and Google indexing.