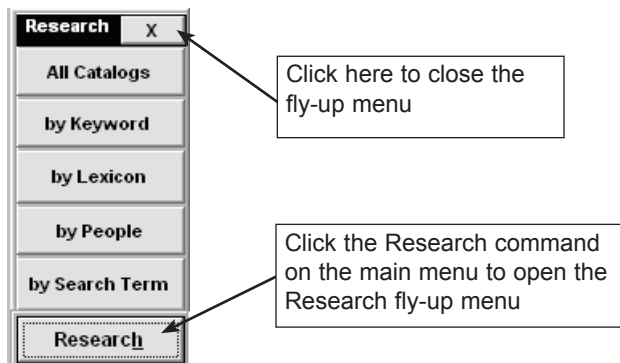


RESEARCH

Research is where all the hard work of cataloging pays off. Research allows you to develop insights and draw conclusions about your collections. The computer 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.

Research has five methods of searching, which are commands on the main menu Research fly-up menu. They include searching **All Catalogs**, **by Keyword**, **by Lexicon**, **by People**, and **by Search Term**. The sixth research method is to use the **Query** command which appears at the top of each of the four catalog screens.

Figure 14-1
Research fly-up menu



Once a catalog record or group of records is located via a search, you can view the Catalog screens for each object, or print a summary or detailed list of the selected objects.

RESEARCH ALL CATALOGS

This search allows you to search all four catalogs at once. The Objects, Archives, Photo, and Library catalogs contain fields that are common to all. These fields are available through the All Catalogs search.

To begin a search, press **Research** on the main menu and then the **All Catalogs** command button on the fly-up menu. The following screen will appear:

Figure 14-2
Research All
Catalogs

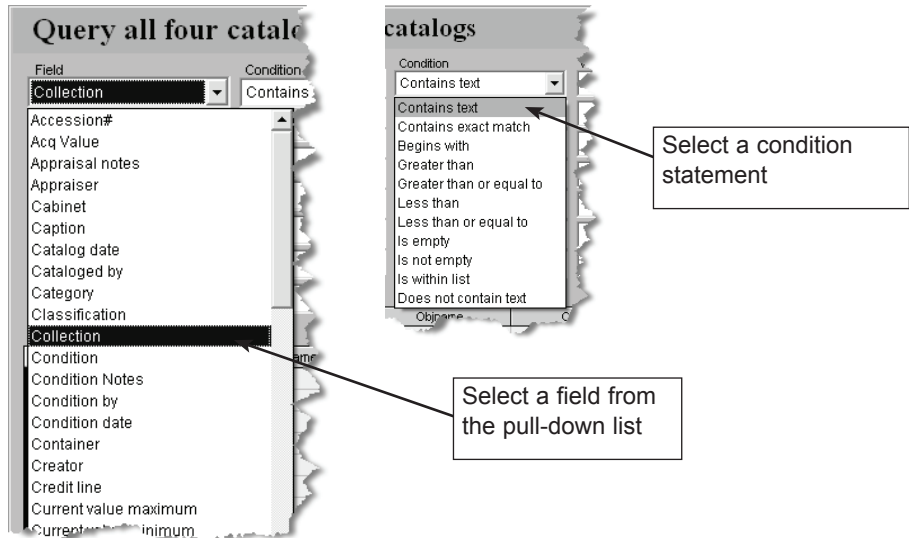
Object ID	Objname	Creator	Title	Description	Collection
A 1995.1.4	Tape, Magnetic		Oral History Tape of Erne	1 hour audio tape containing the voices of Erne	Rocky Pine Ranch Collection
P 1999.1.1	Print, Photographic		A Hilton Wedding	Earl L. Hilton and Ernestine McMillan Hilton stan	Rocky Pine Ranch Collection
P 1999.1.2	Print, Photographic		Our Family	Earl L. Hilton and Ernestine McMillan Hilton stan	Rocky Pine Ranch Collection
P 1999.1.3	Print, Photographic		Granny's Turkeys	Lura Cox Hilton (Granny) feeding her turkeys in	Rocky Pine Ranch Collection
P 1999.1.4	Print, Photographic		Rocky Pine Ranch Barn	Color photograph of the barn at Rocky Pine Ran	Rocky Pine Ranch Collection
P 1999.1.5	Print, Photographic		The barn	The 1902 barn after being painted in 1995.	Rocky Pine Ranch Collection
P 1999.1.8	Print, Photographic		Putting Up Hay	Earl Hilton driving the horse-drawn mower. Th	Rocky Pine Ranch Collection
P 1999.1.9	Print, Photographic		Mowing Hay	Earl Hilton cutting hay with the new mower pu	Rocky Pine Ranch Collection
P 1999.1.10	Print, Photographic		Hay Truck	Three children pose on the front bumper of a r	Rocky Pine Ranch Collection
O 1999.1.11	Funnel		Granddad's Funnel	White enamelware funnel with blue rim. Item h	Rocky Pine Ranch Collection
O 1999.1.12	Sifter, Flour		Flour Sifter	Tin flour sifter with painted green exterior and	Rocky Pine Ranch Collection
O 1999.1.13	Candlestick		Stag Candlestick	Cast bronze floral candlestick in the form of a	Rocky Pine Ranch Collection
O 1999.1.14	Quilt	McMillan, Lucinda	Lucinda Quilt	Hand sewn patchwork quilt made by Lucinda	Rocky Pine Ranch Collection
A 1999.1.15	Album, Autograph		Autograph Album of Erne	Folded leather cover with 32 leaves. This auto	Rocky Pine Ranch Collection

Searches can be performed on any field that is common to all four catalogs. There are seven pull-down field lists enabling you to search multiple fields at once using the "and" or "or" operator to either narrow or expand the search.

Figure 14-3
All Catalogs

Each of the seven pull-down field lists is arranged alphabetically. Click on the field of your choice.

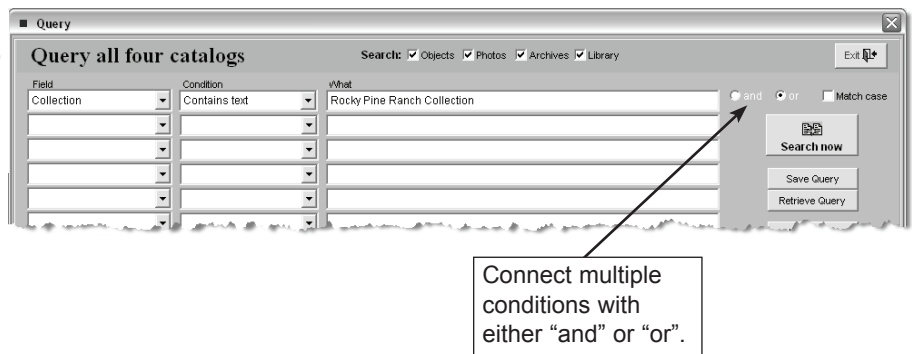
Figure 14-4
Pull-down
field list and
condition
statements



Next select a condition statement in the box to the right. Condition statements include: Contains text, Contains exact match, Begins with, Equals, Greater than, Greater than or equal to, Less than, Less than or equal to, Is empty, Is not empty, Is within list, and Does not contain text.

Then in the next box to the right labeled “What” enter the word or words you want to find; capitalization is not important unless you check the Match Case box at the top right of the screen.

Figure 14-5
Enter words to
find in “What”
box



To start the search, click on the **Search Now** command button.

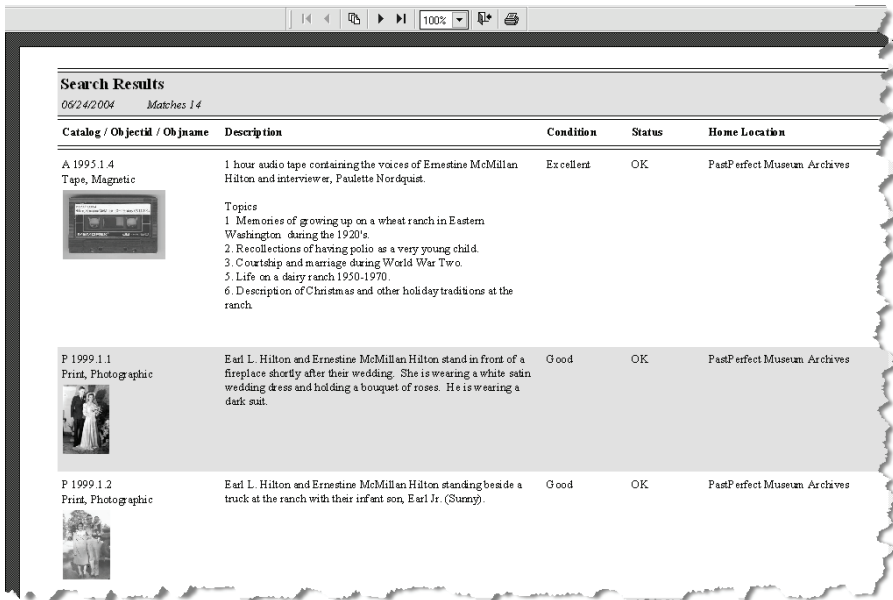
In the example shown we searched the common field Collection for records that contain text "Rocky Pine Ranch." The results were eight photographs, four objects, and two archival records.

If matching records are located, a list is displayed as in Figure 14-2 and a number of options are then available as described below.

View Selected Catalog Records - Use this command button to view the catalog screens for each record located. All functions are available, including displaying source information and images.

Preview List - View the report for the search results before you print it. Check the "with Image" box if you want associated images to display on the list. Note that imaging is an optional feature.

Figure 14-6
Preview List



The screenshot shows a software window titled "Search Results" with a search ID of "06242004" and "Matches 14". The window contains a table with columns for "Catalog / Objectid / Objname", "Description", "Condition", "Status", and "Home Location". Three records are visible, each with a small thumbnail image to its left.

Catalog / Objectid / Objname	Description	Condition	Status	Home Location
A 1995.1.4 Tape, Magnetic	1 hour audio tape containing the voices of Ernestine McMillan Hilton and interviewer, Paulette Nordquist. Topics 1. Memories of growing up on a wheat ranch in Eastern Washington during the 1920's 2. Recollections of having polio as a very young child 3. Courtship and marriage during World War Two 5. Life on a dairy ranch 1950-1970. 6. Description of Christmas and other holiday traditions at the ranch.	Excellent	OK	PastPerfect Museum Archives
P 1999.1.1 Print, Photographic	Earl L. Hilton and Ernestine McMillan Hilton stand in front of a fireplace shortly after their wedding. She is wearing a white satin wedding dress and holding a bouquet of roses. He is wearing a dark suit.	Good	OK	PastPerfect Museum Archives
P 1999.1.2 Print, Photographic	Earl L. Hilton and Ernestine McMillan Hilton standing beside a truck at the ranch with their infant son, Earl Jr. (Sunny).	Good	OK	PastPerfect Museum Archives

Print List - Prints a list of all records that were located in the search.

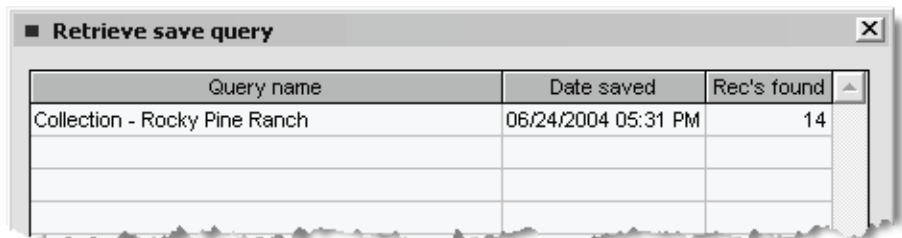
Print Detail, Catalog Cards/Labels - Prints the full catalog record of each record located, one record per page. It also allows you to print catalog cards, catalog record labels, exhibit labels, and barcode labels.

Remove Marked Records - Before you view or print the resulting records list, you can manually remove selected records from the results by clicking in the box to the left of the record to mark it. Then press **Remove marked records**.

Save Query - This command allows you to save queries for future use. The condition statements are saved and not the actual results. You will be asked to give the query a name by which it will appear on the list of all catalog queries.

Retrieve Query - Use this command to select from a list of previously saved queries. Once a query has been retrieved you may run it as is or modify it and then run it.

Figure 14-7
Saved
Queries
List



Query name	Date saved	Rec's found
Collection - Rocky Pine Ranch	06/24/2004 05:31 PM	14

Clear Results - Clears the search result list so you can start a new search.

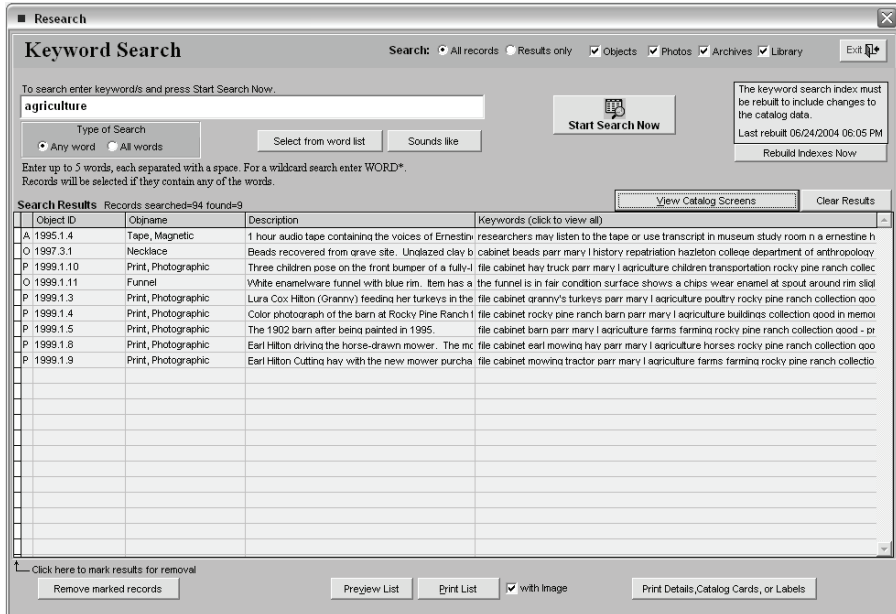
New Search - Clears the search results list and any entries in the "What" fields.

RESEARCH BY KEYWORD

To access this search method, click on the **by Keyword** command on the Research fly-up menu to reveal the screen in Figure 14-8.

The Keyword search is an indexed search, meaning PastPerfect creates a word list from the entries in the Archives, Library, Objects, and Photo 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 yellow box at the top right of the screen. Please note, rebuilding may take several minutes, for this reason, the rebuild can also be included as part of the Reindex process.

Figure 14-8
Research by
Keyword



KEYWORD SEARCH MANAGEMENT

To increase the speed of searches and the time it takes to rebuild the index, you can choose to include only words that are in selected catalog fields. You can also create a list of common words like “and” and “the” that will be ignored. To make these changes, open the Setup fly-up menu from the main menu and select **Keyword Search** to open Keyword Search Management screen show in Figure 14-9.

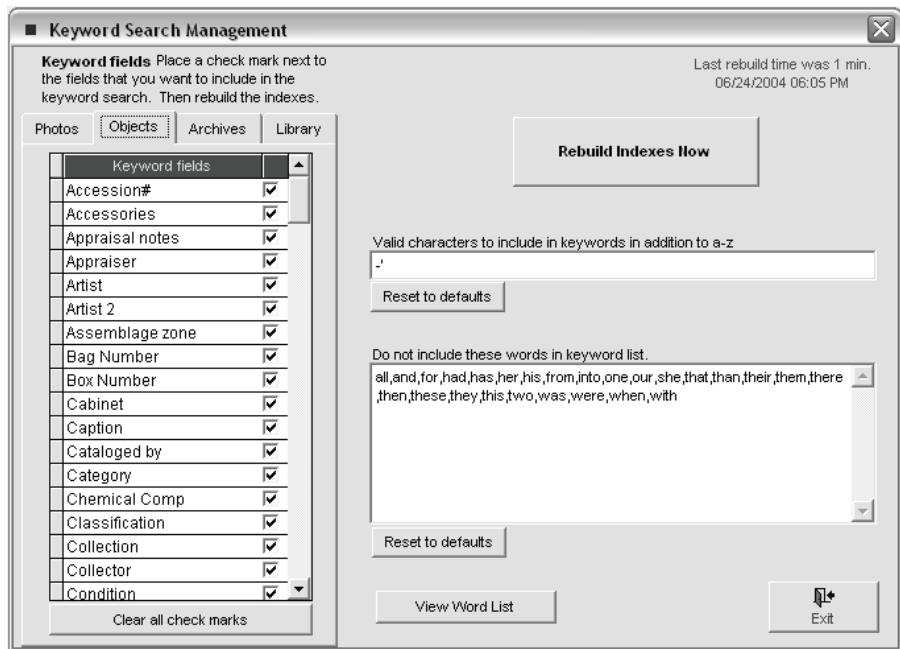
The left side of the screen has four tabs that list the possible search fields in the Photos, Objects, Archives, and Library catalogs. Place a check mark next to the fields that you want to include in the search. The fewer fields you include, the faster the rebuild process and the faster the searches.

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

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.

Figure 14-9
Keyword
Search
Management



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

STARTING A KEYWORD SEARCH

To start a new search, 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** command button. The word list will appear.

Next click the **Start Search Now** command button. The search will begin running and the results will appear on the bottom of the screen.

When the search is complete, the number of records searched and found will display. The commands described earlier in this chapter are now available: **View Selected Catalog Records, Preview List, Print List, Print Detail, Catalog Cards/Labels, Remove Marked Records, and Clear Results.**

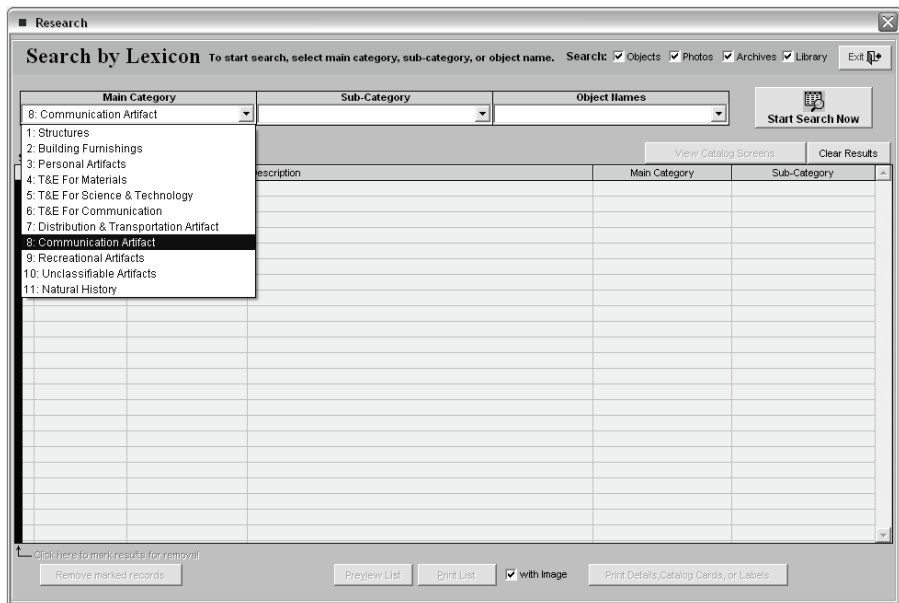
FIND BY LEXICON

Click on the **by Lexicon** command button on the Research fly-up menu to search by lexicon category or term.

A Lexicon search is designed to allow you to search for catalog records by main category or sub-category. Select the Lexicon category by clicking on the down arrow next to the category field. You may then select the sub-category or object name you want to search for. You may want to first select a main category or sub-category to narrow the selection list. To start the search, click on the **Search Now** command button. The Lexicon search has access to all four catalogs: Archives, Objects, Photos, and Library.

For example, you can search for all catalog items in the main category Communication Artifacts, or you can further narrow the search by choosing the sub-category, Documentary Artifact.

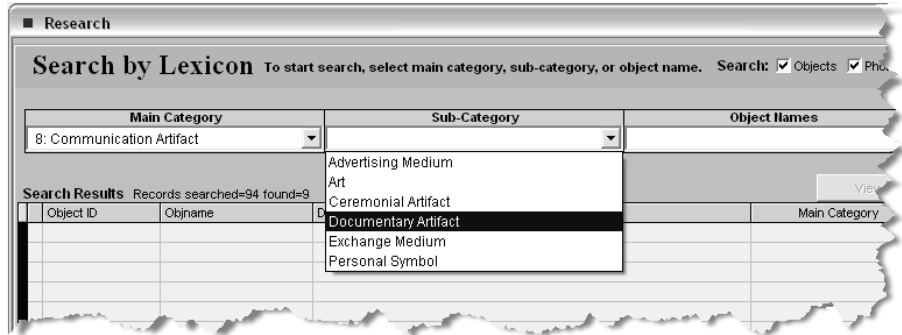
Figure 14-10
Search by
Lexicon



PastPerfect will search for all items in your catalogs that match the criteria category Communication Artifacts, sub-category Documentary Artifact.

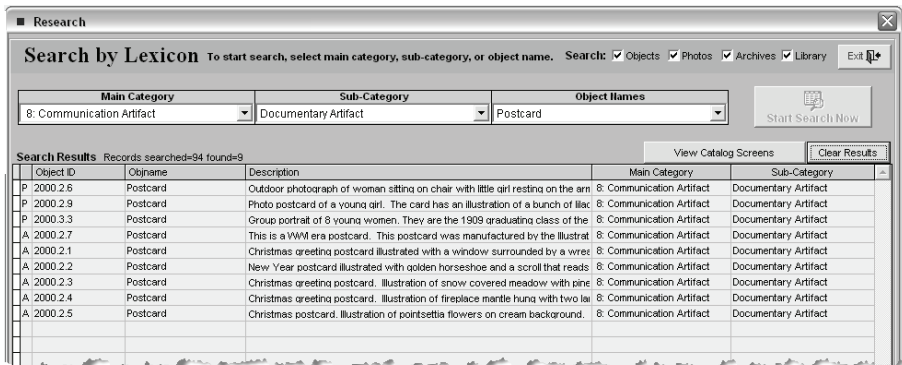
Further narrow the search by choosing an object name. In this example, Postcard is the object name. PastPerfect will search all catalogs to locate any items with the

Figure 14-11
Lexicon
Search by
sub-category



main category Communication Artifacts, sub-category Documentary Artifact, and the object name Postcard. The results appear on the list.

Figure 14-12
Lexicon
search results



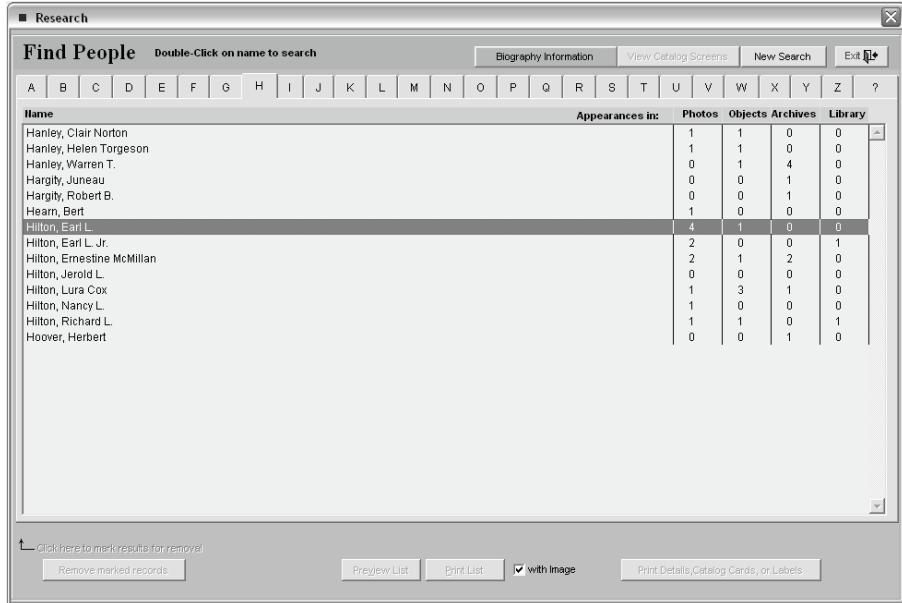
A Lexicon search can be as general or as specific as you like. If matching records are located, a list is displayed and the command buttons **Preview List**, **Print List**, **View Catalog Records**, and **Print Detail**, **Catalog Cards/Labels** are enabled.

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 last name, first name. If each name is separated with a carriage return, then PastPerfect will add the names to the People authority file.

The Research by People screen will display the People authority file. With each appearance of a name, the columns to the right will indicate the number of times the name appears in each of the four catalogs.

Figure 14-13
Research by
People screen



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

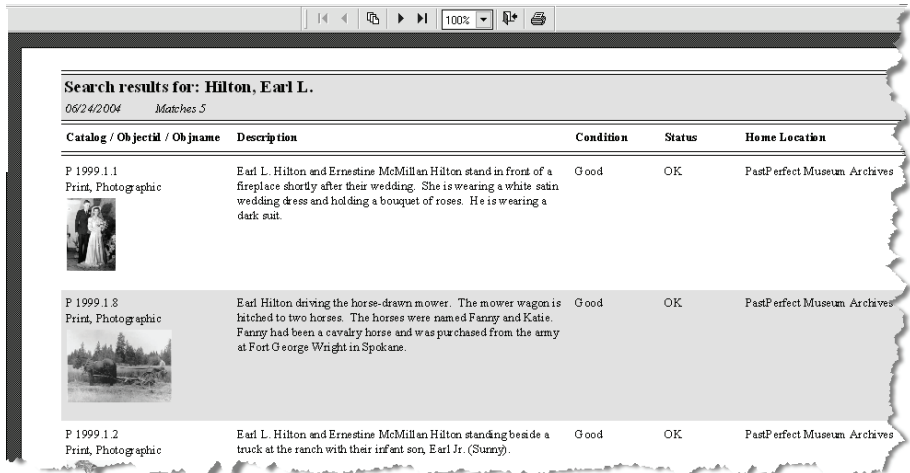
Figure 14-14
Search by
People results



When the search is complete, the four command buttons at the bottom of the screen are enabled.

The command button **Preview List** allows you to view the summary report for the search results before you print it. The following is an example of how Preview List looks.

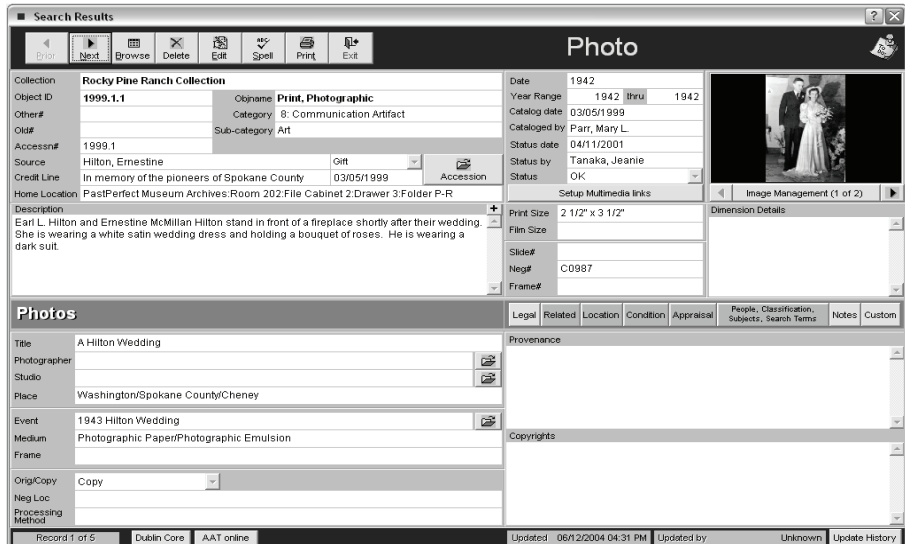
Figure 14-15
Preview List



The **Print List** command button prints the above report.

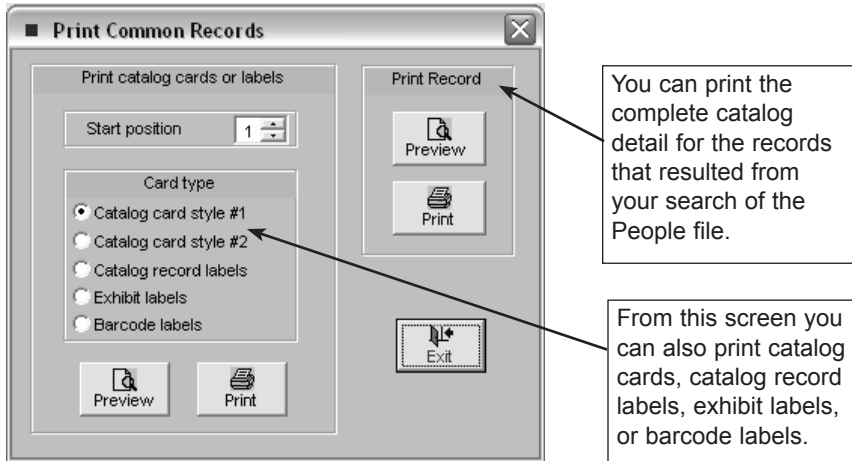
View Catalog Screens takes you to the catalogs, giving you a mini-database containing only the records that resulted from your search.

Figure 14-16
View Catalog
Screens



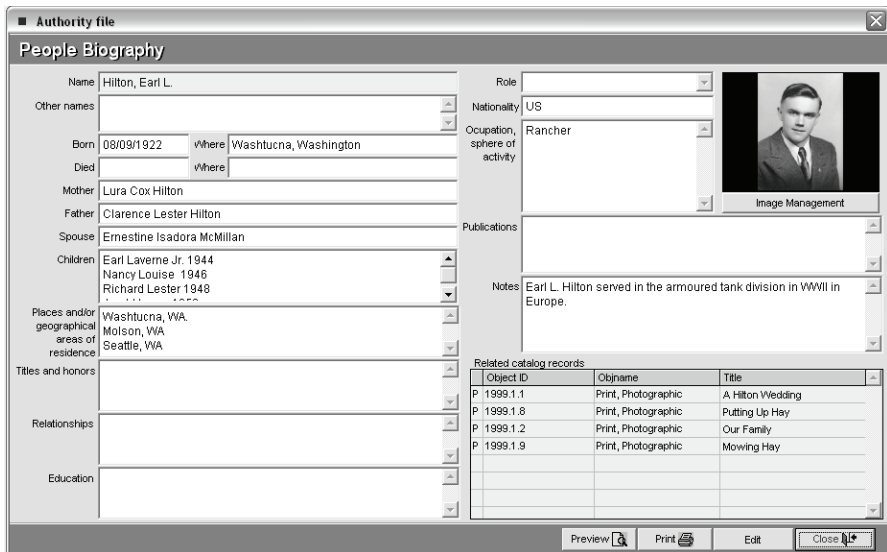
The **Print Details, Catalog Cards, or Labels** command reveals the following screen:

Figure 14-17
Print Details,
Catalog Cards,
or Labels



Research by People allows you to enter or display biographical information. To display or print biographical information from the Research by People screen, first select a name from the People list, then click on the **Biography** command to display, enter, or print genealogical and biographical data. When there is information entered in the Biography screen, the command button will be green. If no information is in the Biography screen, the Biography command button will be grey.

Figure 14-18
Biography
screen



RESEARCH BY SEARCH TERMS

The Research by Search Terms 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 catalog's Search Terms field.

The Search Terms authority file will be displayed on the screen.

Figure 14-19
Research by
Search Term

Search Term	Appearances in:	Photos	Objects	Archives	Library
Carter Family	9	1	0	0	0
Clayton Family	2	0	0	0	0
McMurry Family	3	0	5	0	0
Hilton Family	6	0	0	1	1
Hopalong Cassidy	0	1	0	1	0
McMillan Family	1	2	2	0	0
McWilliams Family	6	0	1	0	0
Repatriation	0	1	0	0	0
Rocky Pine Ranch	6	3	2	1	0
Washington Family	3	0	0	0	0
World War I	0	0	0	0	0
World War II	6	1	4	0	0
WWII	6	1	4	0	0

The search terms are listed on the left half of the screen and the number of appearances in each catalog is 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.

Figure 14-20
Research by
Search Term
results

The screenshot shows a window titled 'Research' with a search interface. At the top, it says 'Search by Search Term' and 'Double-Click on search term to search.' There are buttons for 'View Catalog Screens', 'New Search', and 'Exit'. Below is a table with columns for Object ID, Objname, Description, and Search Term. The table contains 15 rows of search results. At the bottom, there are buttons for 'Remove marked records', 'Preview List', 'Print List', a checked checkbox for 'with image', and 'Print Details, Catalog Cards, or Labels'.

Object ID	Objname	Description	Search Term
P 1999.1.3	Print, Photographic	Lura Cox Hilton (Granny) feeding her turkeys in the yard at Rocky Pine Ranch	Rocky Pine Ranch
P 1999.1.8	Print, Photographic	Earl Hilton driving the horse-drawn mower. The mower wagon is hitched to f	Rocky Pine Ranch
P 1999.1.5	Print, Photographic	The 1902 barn after being painted in 1995.	Rocky Pine Ranch
P 1999.1.10	Print, Photographic	Three children pose on the front bumper of a fully-loaded hay truck.	Hilton Family
P 1999.1.2	Print, Photographic	Earl L. Hilton and Ernestine McMillan Hilton standing beside a truck at the ranc	Hilton Family
P 1999.1.4	Print, Photographic	Color photograph of the barn at Rocky Pine Ranch taken after a snowfall 197	Rocky Pine Ranch
O 1999.1.11	Funnel	White enamelware funnel with blue rim. Item has a place of origin stamped of	Rocky Pine Ranch
O 1999.1.12	Sifter, Flour	Tin flour sifter with painted green exterior and black wooden knob on crank f	McMillan Family
O 1999.1.13	Candlestick	Cast bronze figural candlestick in the form of a stag. It is approximately 12 inc	Rocky Pine Ranch
A 1999.1.15	Album, Autograph	Folded leather cover with 32 leaves. This autograph album contains poems e	McMillan Family
A 1995.1.4	Tape, Magnetic	1 hour audio tape containing the voices of Ernestine McMillan Hilton and inter	Rocky Pine Ranch
L 2000.1.4	Book	Hopalong Cassidy Lends a Helping Hand is a cardboard bound children's boo	Hilton Family

When your search results appear, the **Preview List**, **Print List**, **View Catalog Screens**, and **Print Details-Catalog Cards or Labels** command buttons are activated.

INDIVIDUAL CATALOG SEARCHES

You can also search each catalog separately. These searches can be done within the catalog screen by pressing the **Query** command. These single catalog queries are identical to the All Catalog queries described above except that all fields are available for searching, not just the fields common to the four catalogs.