1

INSTALLATION AND UPGRADE

This chapter will explain how to install PastPerfect on a single computer or a network. It will also show you how to load data from an old version of PastPerfect. At the end of the chapter you will find a list of the new features in version 4.0.

INSTALLATION ON ONE COMPUTER

1. Close all other programs.
2. Insert the PastPerfect CD into the computer's CD-ROM drive.
3. The installation program will start automatically.
4. Follow the instructions on the screen.
5. On the Installation Options screen, choose the **Single Computer** option.

If the installation doesn't start automatically, click Start | Settings | Control Panel | Add/Remove Programs, and follow the instructions on that screen. Once the program is installed, remove the CD and store it in a safe place.

The installation will create this icon on the Windows Desktop that you can use to start the PastPerfect program.

TIP

PastPerfect cannot be installed into a folder with a space in the name. By default, it is installed into c:\pp4. While you can certainly specify a different drive, such as d:\pp4, we recommend that you not change the folder. For example, c:\Program Files\pp4 will not work because of the space between "Program" and "Files."

INSTALLATION ON A NETWORK

PastPerfect is designed to run on peer-to-peer and client/server networks. For PastPerfect to operate as a network program, you will need a network operating system such as Windows XP or Windows NT/2000 Server. You will also need to purchase the network upgrade for PastPerfect.

To optimize performance, the PastPerfect program is installed on each workstation with shared access to common data files residing on the network file server. For small networks with two to three computers, a peer-to-peer network will be acceptable. A peer-to-peer network is simply a group of computers connected to share resources. Windows 98/ME/2000/XP come with network capabilities, which enable the sharing.

For larger networks, a client/server–based network offers greater reliability and security. A server is a dedicated computer, usually more powerful than a typical desktop computer, running server software such as Windows NT Server or Windows 2000 or 2003 Server.

To install PastPerfect on a Windows network, you will need the following:

- Two or more computers running Windows 98/ME/2000/XP or Windows NT Workstation
- One computer to act as the peer-to-peer network server or a dedicated file server
- A network interface card in each of the computers
- A network cable between the computers
- A network device such as a switch, router or hub (required for three or more computers when using a twisted pair cable with RJ45 connectors)

Note: Wireless networks are not suggested for PastPerfect network use.

Before installing PastPerfect on a network, you must first get the network installed and operating correctly. This involves installing the network interface cards in each computer, connecting computers with network cables, and configuring the network software. Instructions for installing network interface cards and cables should be provided by your hardware supplier. Consult your Windows 98/ ME/ 2000/XP/NT documentation for instructions on configuring the network software.

If you don't already have a networked computer system and don't have computer professionals on staff, you may need to hire a network installer to install the network hardware and software. For best performance your network should provide a through-put of 100 MB per second.

Once the network is up and running, follow these steps to install PastPerfect.

On the network file server computer

1. Close all other programs.
2. Insert the PastPerfect CD into the computer's CD-ROM drive.
3. The installation program will start automatically.
4. Follow the instructions on the screen.
5. On the Installation|Options screen, choose the **Network File Server** option.

The installation will create this icon on the Windows Desktop that you can use to start the PastPerfect program. Start PastPerfect. From the Main menu press **Setup** and **Network** and then click the **Install Network Upgrade** command button. You will be asked to insert the Network Upgrade disk to finish this task.

NOTE
Make sure that all the workstations that will be running PastPerfect have full Read and Write privileges to the folder on the server where PastPerfect was installed (by default c:\pp4).
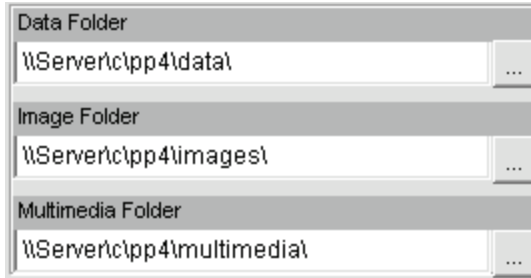
On the other computers (workstations)

1. Close all other programs.
2. Insert the PastPerfect CD into the computer's CD-ROM drive.
3. The installation program will start automatically.
4. Follow the instructions on the screen.
5. On the Installation Options screen, choose the **Network Workstation** option.

After the installation is complete, start PastPerfect. You will be asked to enter the folder names on the file server where the PastPerfect data, images, and multimedia files were installed. For example, if the file server computer is named "Server" and the program and data are installed in the c:\pp4 folder on the server,

Figure 1-1
Network
folders

Data Folder

\\Server\c\pp4\data\   ...

Image Folder

\\Server\c\pp4\images\   ...

Multimedia Folder

\\Server\c\pp4\multimedia\   ...

Notice that the drive letter "c" is entered without a following colon and the entry ends with a backslash.

then the entries would be "\\Server\c\pp4\data\" , "\\Server\c\pp4\images\ ", and "\\Server\c\pp4\multimedia\". If you have shared only the pp4 folder, your entries would be "\\Server\pp4\data\", etc., The \c\ is not needed.

You may want to write your folder names here for future reference.

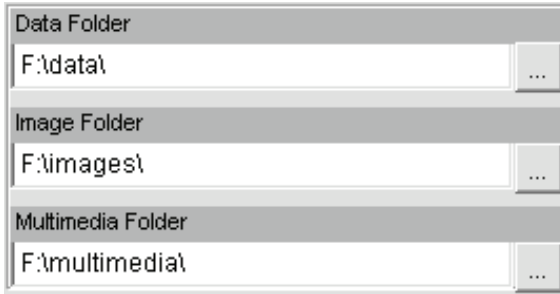Data folder:_____

Image folder:_____

Multi-media folder:_____

The entries for data and image folders cannot contain a space. For that reason, if the server computer name is "File Server" or the folder name on the server is "Program Files\pp4," it will not work. The entries "\\File Server\c\pp4\data\" and "\\Server\c\Program Files\pp4\data" both contain a space and are unacceptable. In this situation, we recommend that you use the standard folder name of "pp4" and not "Program Files\pp4" to avoid the second problem. To avoid both problems, you can use the Windows Drive Mapping feature.

Windows Drive Mapping allows you to create a new drive letter to specify a distinct path on another computer. For example, you could create a virtual drive letter "F:" on the workstation computer that is mapped to "\\File Server\c\pp4\." In this case, the entries for the PastPerfect network folders would be "F:\data\" and "F:\images\ " , and "F:\multimedia\".

To set up drive mapping, you should consult Windows Help. Here are the instructions for Windows XP.

1. Open My Computer and on the Tools menu click Map Network Drive.
2. The next available drive letter will be displayed.
3. In **Folder**, type the path to the folder you want, e.g., "\\File Server\c\pp4."

Figure 1-2
Network
folders
(Mapped
drive)

Data Folder

F:\data\

Image Folder

F:\images\

Multimedia Folder

F:\multimedia\

Notice that the drive let-
ter "F:" is entered with a
following colon and the
entry ends with a back-
slash.

Be sure to put a check in the box Reconnect At Logon. Without this option your
drive mappings will have to be rentered each time you restart the computer.

UN-INSTALLING PASTPERFECT

To remove PastPerfect software from your computer, click Start | Settings |
Control Panel | Add/Remove Software.

Warning! Un-installing PastPerfect will also remove any data and images that you
may have entered.

HARDWARE REQUIREMENTS

PastPerfect may be installed on any IBM or compatible computer with the follow-
ing requirements. If you already have a computer, be sure that it meets the mini-
mum requirements. If you are purchasing a new computer, you should look for
one that meets or exceeds the recommended specifications:

Recommended	**Minimum Required**
Pentium 2.0 Ghz	Pentium 600 MHz
512 MB RAM	128 MB RAM
Color monitor 1024 x 768 resolution	Color monitor 1024 x 768 resolution
Laser or inkjet printer	Laser or inkjet printer
CD or DVD Burner	CD-ROM drive
Mouse	3.5" floppy drive
Windows XP Home	Mouse
High-speed Internet access	Windows 98 or higher

Hard Drive Free Disk Space
Program: 140 MB
Data: 12 MB per 1,000 records
Images: 200 MB per 1,000 images

NOTE Images can be stored in a variety of formats that effect quality, disk storage space, and time required to display. The storage space is also effected by the size of the image.

Multi-media Hardware Requirements
Twain-compatible digital scanner or digital camera
CD or DVD Burner for backing up your images and multi-media files

Network Hardware Requirements
Windows 98/ME/2000/XP peer to peer network or
Windows NT/2000/2003 Server
Network throughput of 100 Mega Bits per second or higher

PASTPERFECT EVALUATION DATA

The PastPerfect Evaluation CD comes preloaded with fictitious data to help you learn the program. To install the Evaluation software, follow the instructions above for installing PastPerfect on one computer. We recommend that you keep the evaluation version of PastPerfect on your computer to be used as a training aid.

CONVERTING YOUR CATALOG RECORDS TO PASTPERFECT

All PastPerfect data is stored in industry-standard Microsoft Visual Foxpro databases. If your data is already in a computer, it can probably be converted and loaded into PastPerfect. There is no need for you to manually reenter this data. From the **Reports** menu you can print out a complete description of Past-Perfect's collection database fields, including the field name, length, and type. Please call us or visit our website at http://www.museumsoftware.com for more information or assistance with your data conversion.

STARTING PASTPERFECT FOR THE FIRST TIME

The first time you start PastPerfect, you will be asked to enter your organization's name and address. The organization name to enter will appear on the PastPerfect main menu. The name and address that you enter will be used on Deed of Gift, Temporary Custody, and Loan forms. The name and address can be changed at any time on the PastPerfect|Setup|Main Menu and Gen. Inforation screens. Once your name is entered, when you start the program you will be taken directly to the main menu.

TIP

PastPerfect version 4.0 requires that your Windows screen size be at least 1024 x 768. If you have been using version 3.x adjusted for full screen, you will need to increase the size. To do this, right-click on the Windows Desktop screen and choose Properties. Select the Settings tab and adjust the screen area to 1024 x 768 or greater. Click Apply and OK to save.

UPGRADING FROM AN OLDER VERSION OF PASTPERFECT

If you already have PastPerfect and have purchased the version 4.0 upgrade, you must load your old data into version 4.0 before you can start using the program. A special import feature is provided to transfer 3.5 data into 4.0. If you have version 3.0 you must first upgrade to version 3.5. If you have version 2.0, 2.5 or 2.6 or are using Scatter/Gather, please contact our tech support office for details on how to proceed.

To import your PastPerfect 3.5 data into version 4.0, perform these steps:

1. Update your old version to 3.5.
2. Install PastPerfect version 4.0.
3. Import your old data.
4. Reindex the new data files.
5. Rebuild Report Maker forms.
6. Remove old version.

1. UPDATE YOUR OLD VERSION 3.5. *Before you start the installation, be sure to backup all version 3.x files and images.* The import feature will only transfer data from version 3.5 of PastPerfect. If you have version 3.0, you will need to download and install the version 3.5 update from our website http://www.museumsoftware.com. Follow the instructions on the website for installing this update.

2. INSTALL PASTPERFECT 4.0. The next step is to install the new software, version 4.0. This procedure is explained in the first part of this chapter. When you install version 4.0, be sure to install it in the default folder (c:\pp4\) to ensure that it will not affect the operation of your old version. If you mistakenly install version 4.0 into the version 3.x folder (c:\pp3\), you will erase your existing data.

3. IMPORT YOUR OLD DATA Now you are ready to transfer your data. To do this, start version 4.0 by clicking on the new PastPerfect IV desktop icon which will take you to this screen.
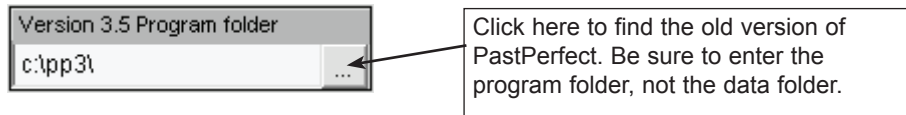
Figure 1-3
Import Data
screen

You will need to specify the location of the old version 3.5 program. Usually the old program is located in c:\pp3\. However, if you have the program installed somewhere else, you will need to enter that folder name in this field.

Figure 1-4
Old program
folder

Version 3.5 Program folder	
c:\pp3\	...

Click here to find the old version of PastPerfect. Be sure to enter the program folder, not the data folder.

You have an option to import data, images, or both. Generally, you should select both unless for some reason you are rerunning the import.

To start the process, click on the **Import Now** command button. If you have more than 10,000 records or digital images, this process may take several minutes.

4. REINDEX THE NEW DATA FILES. Once the import process is complete, press the Exit button at the bottom right of the screen. This will take you to the PastPerfect main menu. If you were using security you should check that screen as some of the options have changed. Then, before using the program, you should select Reindex and Start Reindex Now to complete the process.

5. REBUILD REPORT MAKER FORMS. The transfer process will attempt to import custom reports that you may have created with the Report Maker. However, depending on the complexity of the report, it will not always be successful. In most cases you can finish the transfer by rebuilding the report layout. To do this, you just need to run the report from the Report Maker screen. Please see Chapter 16 for more information.

6. REMOVE THE OLD VERSION. At some point you will want to remove the old version 3.5 of PastPerfect from your computers. This can be done by using the Windows Add/Remove software function. Click on Start - Control Panel - Add Remove Programs. Be sure *not* to delete the new version 4.0 program. And do not delete the old program until you are absolutely sure that everything has transferred properly.

NOTE

It is possible to re-run the data import function again after you have already started using PastPerfect 4.0. However, please be aware that this process will ERASE all data in version 4.0 so use it only when you are sure this is what you want to do.

The data import procedure can be run from the PastPerfect main menu by selecting Utilities - Import - Import data from PastPerfect Version 3.5. Then to open the import screen you will need to enter the password GO40.

WHAT'S NEW IN VERSION 4.0

This new version of PastPerfect is a major upgrade and contains hundreds of new features. We are not going to list them all here, but this is some of what you will see.

GENERAL

- Audio, video, documents, and web pages can be linked to catalog records
- Different browse settings for each workstation
- Function keys are defined separately for each user
- Larger screen sizes for more information
- Rich Text word processor for creating letters
- Slide show on main menu with user selected images
- To do list on main menu

ACCESSION

- Allows up to four donors for each accession
- Find function allows search of all fields including description
- Images of catalog items on collection detail screen
- Link all four donors to contacts screen

ALL CATALOGS (OBJECTS/ARCHIVES/LIBRARY/PHOTOS)

- Ability to have separate default data screens for each user
- Current field is highlighted during editing
- Date only custom fields
- Find by any field and find nearest record if exact match is not found
- History button to show updated date and updated by history
- More Custom fields, 22 total
- More location fields: building, room, wall, cabinet, shelf, box, container
- Query command allows research from catalog screens
- "To do" list for each catalog including a "Flag for review" option, so that certain records can be marked for further inspection by a supervisor

- View Dublin Core elements in XML from catalog screens
- Web link to Getty Art & Architecture Thesaurus or Library of Congress from catalog screens

ARCHIVES CATALOG

- New section for cataloging Oral History
- New section for cataloging Music collections
- New fields for updated ISADg
- Option to search Container List fields
- Spell check for Container List

AUTHORITY FILES

- Archaeology Site file includes images and list of related object records
- Biography file includes photo-image
- Creator file includes photo-image, a list of catalog records associated with the person, and new fields for role, education, publications
- Details option for custom field authority files
- New authority files for subfamily, subspecies, made, experts (collector, conservator, archivist, preparator, identified by, excavator, narrator, interviewer, transcriptionist), used, found, owned, dating method, technique, culture, school, preservation method
- Option to share authority files for custom fields with all four catalogs
- User defined combo boxes for: inscription type, inscription technique, original/copy, flag reason, and disposal method
- UTM-universal transverse mercator values on Archaeology Site file
- Web link to Getty Union List of Artists Names from Creator authority file
- Verified authority files - checks for valid entry in field

CONTACTS (MEMBERSHIP)

- 80 User defined mailing lists
- Biography information screen with extended data including, birthday, nick names, education, publications, relations, marital status, sex, birthplace, employer, occupation, interests, affiliations, titles and honors

- Campaign tracking with up to ten fund-raising activities for each campaign
- Donations and new memberships can be credited to a solicitor and linked to a campaign
- Keep address history and change date
- Improved E-mail function that doesn't require MS-Outlook
- Membership and Individuals combined into one contacts file
- More information about volunteers including: status, available days and hours, emergency contact, skills and work preferences
- Programs and Events attended list
- Rich Text word processor for creating letters
- Select formal or informal salutation when printing letters
- Six custom fields including one date and two numeric
- Track pledges including scheduling payments and sending reminder letters

DIGITAL IMAGING

- Ability to scan or attach high resolution images and automatically create a low resolution discovery image
- Authority files for image metadata fields
- Copyright flag if image is restricted
- Display EXIF image information
- Improved crop with mouse function
- Magnifying Glass
- Smooth scroll
- Watermark images
- Zoom window

EXHIBITS

- Images of exhibits
- Record Shipping & Insurance information for traveling exhibits
- New fields for agreement signed, renew date, renewed until, renewed by, loan fees, ship date, arrival date, ship from, ship to, transportation paid by,

form of transportation, crate types, number of crates, crate list, primary carrier, additional carriers, handlers, and insured by

LEXICON

- Option to deactivate Lexicon alert
- Option to allow entry of catalog records without object name

LOANS INCOMING

- Add images to catalog records on collection list
- Option to search lexicon when adding catalog records
- Web link to Getty AAT from add catalog records screen
- New fields for credit line, due date, purpose, agreement signed, renew date, renewed until, renewed by, loan fees, ship date, arrival date, ship from, ship to, transportation paid by, form of transportation, crate types, number of crates, crate list, primary carrier, additional carriers, handlers, and insured by

LOANS OUTGOING

- New fields for agreement signed, renew date, renewed until, renewed by, loan fees, ship date, arrival date, ship from, ship to, transportation paid by, form of transportation, crate types, number of crates, crate list, primary carrier, additional carriers, handlers, and insured by

MULTI-MEDIA

- Catalog and accession records can be linked to audio, video, Word documents, Excel files, PDF files, HTML files, web sites, and large archival images

OBJECTS CATALOG

- New section for Archaeology
- New sub-screen for inscription details
- Separate and expanded Geology & Natural History sections

PHOTOS CATALOG
• Print slide labels

RESEARCH
• Ability to save Queries
• Keyword search not limited to words longer than 2 letters
• Option to remove selected records from search results before printing or viewing
• Security setting to provide researcher with "Research Only" main menu
• Separate catalog queries now run directly from catalog screens

REPORTS
• Ability to select records for catalog reports & labels by filter statement
• New reports:

>   Location value report
>   Pledge reminders and thank you letters
>   Report listing subjects used in the catalogs
>   Report on in-kind donations by date, donor, or value
>   Temporary custody list
>   Terms added to Lexicon

UTILITIES
• AutoReindex.exe that can be run outside PastPerfect
• Backup directly to CD or DVD with option to include data, images, and/or multimedia files
• Export to Dublin Core – XML
• Improved Scatter/Gather for all data & images

These new features will be explained in detail in the following chapters