

INTRODUCTION TO PASTPERFECT

Welcome to PastPerfect Museum Software version 4.0. 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 relying on the predefined catalog data fields, you will be able to start cataloging your collections immediately. For those of you who are upgrading from version 3.0 or higher, we think you will be pleased with the numerous enhancements. For more information on what is new in version 4.0, please see Chapter 1, *Installation and Update*.

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, imaging, 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 membership 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. Extra custom fields are also provided for each screen.

- The **Objects Catalog screen** has over 230 data fields that allow you to enter detailed information about each object. The fields include Object ID, Object Name, Source, Material, Site Name or Locale, Permanent and Temporary Locations, Provenance, Detailed Description, Dimensions, Place of Origin, Early and Late Dates, Condition, Status, Maintenance Cycle Information, and Detailed Notes. You may catalog art, artifacts, natural history, history, or geology objects in this catalog.
- The **Photos Catalog screen** allows you to record information about each item in your photograph collection, including object type, photographer, title, film size, print size, place, people, description, classification, studio, and event.
- The **Archives Catalog screen** 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, abstract, storage location, container list, literary rights, and notes.
- The **Library Catalog screen** allows you to record information about books, pamphlets, and magazines. Data fields include call number, title, author, subject, 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 can be added to the record.

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

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, and registrar name, as well as the type of donation, such as gift, bequest, purchase, transfer, or exchange.

Every item in your collection is linked to its source or donor by its accession number. The Accession module 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 cataloging for each item. A great advantage of PastPerfect's Accession module is that you never have to type another accession form. Simply print the Accession form and generate a hard copy of the accession record for your files. You may also use the Accession module to create a Deed of Gift form, and even a thank you letter to send to the donor.

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 is equipped with *The Revised Nomenclature for Museum Cataloging: A Revised and Expanded Version of Robert G. Chenhall's System for Classifying Man-Made Objects*, by Blackaby, Greeno, and the Nomenclature Committee. The Lexicon organizes each object name into 11 categories and 100 sub-categories. 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 particular needs.

LOANS

PastPerfect will track both incoming and outgoing loans. Each item that is on loan is flagged so you can easily access the Loans Information screen directly from the catalog record. A loan history is maintained for all items that have been loaned out.

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 Detail Exhibit screen directly from the catalog. A history of exhibits is maintained as well as the exhibit history of each item. There is also an option to print exhibit labels.

CONTACTS MANAGEMENT

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

RESEARCH

The Research section of PastPerfect provides staff and visiting researchers with a variety of finding aids and access points. Searches may be performed on selected fields in the Objects, Photos, Archives, or Library catalogs or on common fields in all catalogs. You may also search for appearances of specific people depicted in photos or associated with other items in the collection. The search results may be printed or the selected records and their images may be viewed.

PASTPERFECT REPORTS

Reports can give you new and unexpected insights into your collections. PastPerfect comes with over 200 predefined reports. They cover every aspect of the data, including accessions, catalogs, membership, exhibits, and loans. Most standard reports allow you to select the information that appears on the report based on ranges of

information that you designate. The layout of all reports can be modified to your specifications.

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 allows you to use everyday language rather than cryptic mathematical symbols. Data for the report can be selected based on 18 different comparison operators that use English terminology like “Begins with,” “Ends with,” “Exactly matches,” and “Sounds like.” You can easily summarize the data you find, and you can calculate totals, averages, and counts, or find the largest or smallest values.

Report Maker can display results in the form of reports, on-screen tabular views (a browse window), ASCII text files, Database, Lotus, or Excel spreadsheets. When you output the query to a report, Report Maker helps you modify the page layout and preview the results on-screen before printing. The modified report form is saved as part of the query for future use.

PASSWORD PROTECTION

PastPerfect contains a password protection system that helps ensure the integrity and security of your collections. Your data will become 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. With PastPerfect’s password protection, 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.

UTILITIES

Utilities are your housekeeping functions for making sure your PastPerfect system runs smoothly. The Utilities section has eight command buttons to access the following functions: Backup, Restore, Scatter Data, Gather data, Import, Export, Global Update, and System Information. Backup is, arguably, the most important

of these functions. It is provided to make sure that your data is safeguarded in case of catastrophic computer failure. However, it won't help if you don't use it regularly.

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 a detailed tutorial. We are confident that when you reach the last page of 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 FOR PASTPERFECT

MULTI-MEDIA

PastPerfect can be equipped with multi-media linking capability, allowing you to attach digital images, audio files, video files, MS-Word documents, MS-Excel files, and PDF files, to each catalog record. You may also link each catalog or accession record to one or more web pages. You will need the PastPerfect Multi-media module, which is sold separately, and related software such as MS-Word, MS-Excel, and web browser software.

NETWORK OPERATION

PastPerfect can 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 a network operating system such as Windows Network or Windows NT. You will also need to purchase the optional network upgrade for PastPerfect. To optimize performance, PastPerfect allows you to install the program on each workstation and share access to common data files residing on the network file server.

SCATTER/GATHER

Scatter and Gather are intended for use by museums that enter data on two or

more computers that cannot be connected by a network. The Scatter and Gather features are used to transfer data and digital images from one PastPerfect computer and merge them with data on another PastPerfect computer. To use Scatter and Gather you will need to purchase the Scatter/Gather Upgrade.

BARCODE PRINTING

You may add the capability of barcode printing 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. When you are ready for barcode printing, PastPerfect is ready, too.

EZMARC

ezMARC is a software product designed to help you import and export records from MARC 21 to PastPerfect and from PastPerfect to MARC 21. MARC (Machine-Readable Cataloging) was developed at the Library of Congress in the 1960's. You may import and export records from any of the four PastPerfect Catalogs, including Archives, Objects, Photographs, and Library. ezMARC allows you to create your own data map for each catalog. It is important to keep in mind that MARC was developed specifically for bibliographic cataloging. It is best used for books, maps, serials and other published materials.

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 website 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 may select which records from PastPerfect's Object, Photo, Archive, and Library catalogs to include.

