

# 3

## GETTING STARTED

This chapter will walk you through the basic steps to set up PastPerfect for your organization. Before you begin this task, PastPerfect must be installed on your computers. *See Chapter 1, Installation and Upgrade*, for details on installation.

These are the steps recommended when using PastPerfect for the first time.

1. Read this manual.
2. Experiment with the evaluation software.
3. Setup the main menu.
4. Enter general information for your organization.
5. Create custom fields.
6. Customize the Browse screens.
7. Set up spell checking.
8. Create authority files and combo boxes.
9. Set up your function keys.
10. Set up security.
11. Define a backup routine.

If you purchased any of the optional features, they must be installed.

1. Install Multi-media upgrade.
2. Install Network upgrade.
3. Install Scatter/Gather upgrade.
4. Install Barcode Printing upgrade.

5. Install ezMARC upgrade.

After completing the above steps, you are ready to start entering data. This is the recommended order to enter data.

1. Convert existing data.
2. Enter your donors as contacts.
3. Enter your accession records.
4. Catalog your objects, photos, archives, and library items.
5. Create records for your incoming and outgoing loans.
6. Create records for your current exhibits.
7. Set up your contacts, campaigns and members files.

Information about setting up multi-media, barcode printing, contacts, campaigns, and members will be covered in later chapters. So if you are ready, let's get going.

## USING PASTPERFECT FOR THE FIRST TIME

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### STEP 1: READ THIS MANUAL

Apparently you are reading the user's guide, because here you are. Admittedly, this guide is not as exciting as a mystery novel and some of it may be downright boring. However, we highly recommend that you start by reading it cover to cover. Don't be too concerned with trying to remember everything, just browse through it to get a general idea of what the program can do. After you start using PastPerfect you can then use the manual as a reference.

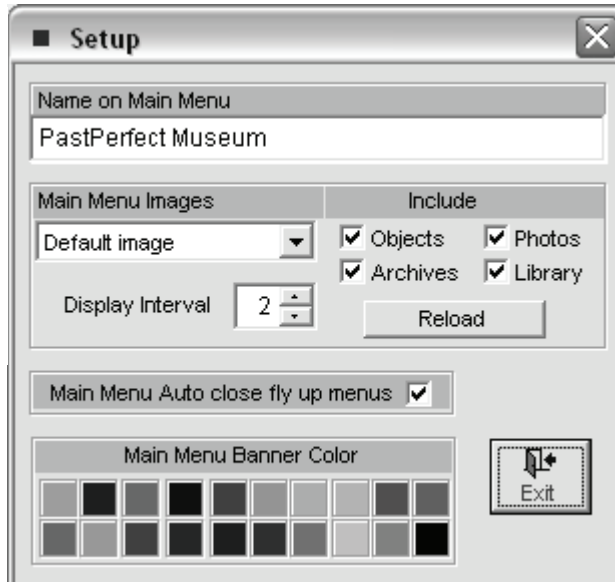
### STEP 2: EXPERIMENT WITH THE EVALUATION SOFTWARE

If you have an evaluation copy of PastPerfect installed on your computer, you should leave it there for a few months. Since this program is already loaded with fictitious data, it can be quite helpful as a training tool. If you are nervous about trying new functions, try them first in the Evaluation version. Also take a look at the catalog screens for some ideas on how items are described.

## STEP 3: SETUP THE MAIN MENU

You may want to change the look of the PastPerfect main menu. To do this from the PastPerfect main menu, click on the **Setup** command button to open the Setup fly-up menu and then click the **Main Menu** command button to open the Main Menu setup screen.

Figure 3-1  
Setup Main  
Menu



**Name on Main Menu** - Enter your organization's name as you want it to appear on the PastPerfect main menu. This setting is the same for all workstations.

**Main Menu Images** - There are three options for the large image display on the main menu: "Default Image" which displays a single static image, "Default Slide Show" which displays a slide show of all images stored in the Menu Images folder, or "Catalog Record Images" which displays a slide show of your catalog record images.

Default Slide Show - PastPerfect comes with about 45 images loaded into the Menu Images folder. If you like you can add to or replace these images simply by copying image files into that folder which is usually located in at "c:\pp4\MenuImages". If PastPerfect is installed on a network, each workstation can enjoy their own set of images.

Catalog Record Images - If you purchase the optional Multi-media option and have digital images of your collection, you can have these images appear as a slide show on the main menu. Select which of the four catalogs' images you wish to display - Objects, Photos, Archives, and Library.

If using one of the slide show options, you should select the interval between image changes. This can be from 1 to 99 seconds. Finally press the Reload command to prepare the show.

**Automatically close fly-up menus** - If you click on the command buttons Research, Utilities, or Setup, additional command buttons are displayed on fly-up menus. You can choose to have these fly-up menus automatically closed when you leave the main menu or remain open until you press the X in the upper right-hand corner of the fly-up menu.

**Main Menu Banner Color** - Click on the desired color to use as a background for your organization's name on the PastPerfect main menu.

## STEP 4: ENTER GENERAL INFORMATION

Before you begin entering catalog records, some basic information needs to be entered, such as your organization's name and address. You may have already entered this when you installed the software, but in case you entered it incorrectly or need to change it, this can be done on the General Information screen.

From the PastPerfect main menu, click on the **Setup** command button to open the Setup fly-up menu and then click the **Gen Information** command button to open the General Information screen.

In the top two fields, enter your organization's name. The name in the first field will display at the top of printed Accession forms. The name entered in the second field will be printed on the Temporary Custody forms.

In the next four fields enter your organization's name, address, and phone number as you want it to be printed on the Temporary Custody, Deed of Gift, and Loan forms.

**AAT Website** - By default the url for the Getty Art & Architecture Thesaurus website is entered. The AAT is a structured vocabulary containing around 125,000 terms and other information about art concepts. Terms in AAT may be

Figure 3-2  
General  
Information  
Screen

used to describe art, architecture, decorative arts, material culture, and archival materials. The coverage of the AAT ranges from Antiquity to the present. On the bottom of the Objects, Photos and Archives screens is a command button that will take you to the website for assistance in naming collection items. For the command to function, your computer must be connected to the internet.

**ULAN Website** - By default the url for the Getty Union List of Artist Names is entered. The ULAN is a structured vocabulary that contains around 250,000 names and other information about artists. On the bottom of each PastPerfect artist authority file screen is a command button that will take you to the website for obtaining information about artists. For the command to function your computer must be connected to the internet.

**Library of Congress Website** - By default the url for the Library of Congress Online Catalog is entered. If your computer is connected to the internet, a command button at the bottom of the Library screen will take you to this website to search their database of publications.

**Hard Drive Backup Folder** - By default this is set to c:\pp4\backup\. This is the location on your hard drive where data backup files will be placed when you select "Backup Data to Hard Drive" from the Backup menu. You can select any folder on your computer or network. This setting can be different for each workstation on a network. We recommend that you use the default setting. Even if this is just a workstation on the network, it is best to have the backups

saved locally rather than on the file server where the data already exists. The backup is a fail-safe system with each workstation saving copies of the data.

**Save Report Maker Output To** - When creating custom reports with Report Maker, you can select to have the output sent to a dBase, Excel, or ASCII file rather than the printer. The entry here specifies where those files will be saved.

**CD or DVD Backup/Restore Drive** - Select the drive letter for your computer's CD drive that will be used to restore data. This setting can be different for each computer if PastPerfect is installed on a network.

**Removable Backup Drive** - This is the drive where data backup files will be placed when you select Backup Data to Removable Drive from the Backup menu. For a floppy backup, you probably want to enter "A:". If you want to backup to a Zip drive it will be a different letter drive. You can find this letter by double-clicking on My Computer from the Windows Desktop.

**Objectid# Sort** - Select how you want to sort your catalog records by objectid#. It can be either a numeric sort or an alpha sort. If sorting numerically and your numbers are multi-part, you must enter the character that separates the parts. This sorting choice applies to Accession# as well.

**Maximum # of catalog records to display for one Accession** - Most Accessions include only a small number of catalog records. However, in some rare cases, such as archaeology collections, there may be thousands of catalog records associated with a single Accession. In this case you can speed the opening of the Accession screen by limiting the number of records that display. The default setting of 1000 is advisable.

**Printer Selection Prompt** - Three options are available. Generally you will want to use the "Standard" option which will open the familiar pre-print window where you can select the printer, Properties, and number of copies to print. The second choice "Network prompt" may be required on some networks that only allow you to print to the default Windows printer. With this option you can select the default Windows printer before printing. The third option "No prompt" may be convenient if you want to skip the pre-print window.

**Right-mouse function** - When in add or edit mode the right mouse can have different functions. If set to Authority file, when you right click on a field with an authority file it will open that file. If set to Text editing, when you right-click

on a field it will open the Edit/Cut & Paste menu. A setting of Both will open authority files when selecting authority controlled fields and open the Edit/Cut & Paste menu when selecting non-authority controlled fields.

**Catalog Screens Font** - Select the font name, font size, and font style. This setting will apply to the main screens in PastPerfect. Please note that using larger font types or a font size greater than 10pt may cause some data fields to truncate the display of information.

**Catalog Record date format YYYY/MM/DD** - Placing a check mark here forces entries in the data field on catalog records to the Year/Month/Day format. Otherwise the format can be unstructured.

**Country** - Select either USA or UK. For users of PastPerfect in the UK, we provide a different format for telephone numbers and addresses. Also for the UK, the Deed of Gift is called Transfer of Title and currency is displayed in pounds.

**Date Style** - PastPerfect supports a variety of date formats, including American (04/28/2001), British (28/04/2001), German (28.04.2001), Italian (28-04-2001), Japanese (2001/04/28), or USA (04-28-2001). Since dates are stored as Julian dates, changing the date style will reformat the display and printing of all newly entered and previously entered dates.

**Backup Reminder Days** - Select any number (other than zero), and when that number of days has passed without a backup, when exiting the program you will be reminded to backup. It is extremely important that you backup your PastPerfect data. We recommend that you perform backups daily.

**Roll Over Year** - By default, the roll over year is set to 50, modifying two-digit year entries to become the 20th century if the year is entered as 50–99, or the 21st century if the year is entered as 00–49. However, the roll over year may be set to any number from 00 to 99. For example, a roll over entry of 75 would adjust the two-digit year entry of 76, as in 03/14/76, to become 03/14/1976, while the two-digit entry of 71, as in 03/14/71, would become 03/14/2071.

**Report Maker Debug Mode** - Placing a check mark here activates special reporting when running a report that you have created with Report Maker. This is used

to assist support technicians when helping you diagnose complex report problems. Leave this box blank unless instructed differently by a support technician.

**XP Style Buttons** - Place a check mark here if you want the command buttons in PastPerfect to match the rounded XP style. This only applies if your computer is running Windows XP.

**Setup default Excel files** - Campaigns and Exhibits can be linked to Excel spreadsheets for tracking activities, costs, attendance, etc. The default files created here will be applied whenever a new campaign or exhibit is entered. MS-Excel software is required for this feature to work.

**Unlock Upgrade Options** - This command can be used to install any of the five optional features, Multi-media Upgrade, Network Upgrade, Scatter/Gather, Barcode Printing, or ezMARC.

## STEP 5: CREATE CUSTOM FIELDS

Even though PastPerfect comes with hundreds of data fields for describing your collection, some of us just want more. For each of the four catalogs-Objects, Photos, Archives, and Library-there are 22 additional fields that you can create. These custom fields can be different for each catalog but they are the same for each record in a catalog. These fields are located in the Custom section of each catalog.

To define your own field names, click the **Custom Fields** command button from the Setup fly-up menu, which will reveal the screen shown in Figure 3-3.

Select the appropriate tab and enter the field names as they will display on the screen and reports.

For Objects, Photos, Archives, and Library, you can create ten character fields (custom fields 1–10) that will hold up to 75 characters. Custom fields 11 and 12 will hold 20 characters. Custom field 13 is for entry of integers only up to 999999999999, while custom fields 14 and 15 will accommodate numbers with two decimal places up to 99999999.99. Custom fields 16 and 17 will accommodate numbers with three decimal places up to 99999999.999. Custom fields 18–20 are for dates and Custom fields 21 and 22 allow unlimited data entry.



Custom field 1 is a special field, since it will be placed on the **Find** screen to allow instant searches based on its content. Custom fields 1–10, 21 and 22 are also special, since they can have authority files assigned to them to help with consistent data entry. On the setup screen you can select whether you want to use separate authority files for each of the four catalogs' custom fields or if you want to use shared authority files.

Figure 3-3  
Setup  
Custom field  
names

Objects	Photos	Archives	Library	Accession	Contacts	
Character field 1	Photo field 1	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Character field 11	Photo Field 11
Character field 2	Photo Field 2	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Character field 12	Photo Field 12
Character field 3	Photo Field 3	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Numeric field 13	Photo Field 13
Character field 4	Photo Field 4	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Numeric field 14	Photo Field 14
Character field 5	Photo Field 5	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Numeric field 15	Photo Field 15
Character field 6	Photo Field 6	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Numeric field 16	Photo Field 16
Character field 7	Photo Field 7	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Numeric field 17	Photo Field 17
Character field 8	Photo Field 8	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Date field 18	Photo Field 18
Character field 9	Photo Field 9	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Date field 19	Photo Field 19
Character field 10	Photo Field 10	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Date field 20	Photo Field 20
Memo field 21	Photo Field 21	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Memo field 22	Photo Field 22	Setup Authority file	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Fill field names from Objects      \* Check box "Shared" to share authority file with Objects catalog      Exit

The Accession screen has no user-defined fields, but when selecting this tab you can select the formatting for dates entered in the **Received Date** field.

The Contacts tab allows you to label the six custom fields on the Contacts screen. Fields 1-3 will accommodate entries of up to 75 characters. Field 4 is for dates and fields 5 and 6 are for numbers of the format 9999999.99.

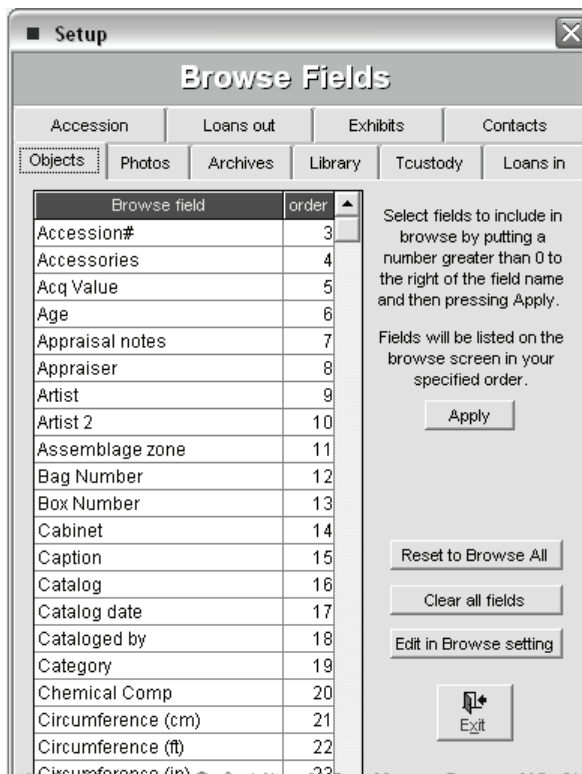
## STEP 6: CUSTOMIZE THE BROWSE SCREENS

When you press the **Browse** command button from one of the screens, the data fields will appear in columns much like an Excel spreadsheet. From the Setup | Browse screen you can select which fields display and change the order of the columns.

The Browse Field setup screen has 10 tabs, one for each screen that has a Browse command. Each field name is listed, and to the right of the name is a number indicating the column order of its appearance. To restrict a field from displaying, set the order to 0. Be sure to click the **Apply** button after you have made changes.

By default, when you are in Browse you cannot edit or delete data. We recommend that you leave it this way; however, to accommodate times when you want to make changes in Browse mode, you can temporarily activate editing and/or deleting capability by clicking Edit in Browse Setting. Because there is no verification when editing in Browse mode, you are always restricted from changing object ID numbers. If you really want to change these numbers in Browse mode, it can be done from the Command window on the Global Update screen.

Figure 3-4  
Browse Fields  
setup



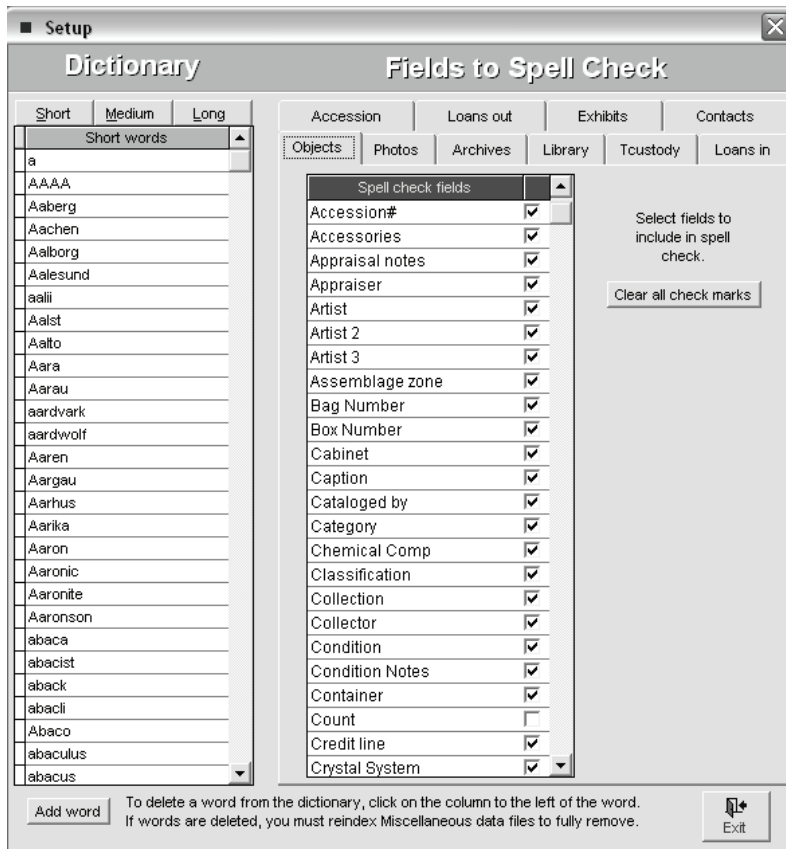
## STEP 7: SET UP SPELL CHECKING

PastPerfect comes with a dictionary of over 195,000 words that can be used to spell check your data entry. To spell check a record, simply click on the **Spell** command button at the top of the screen. By default, all fields (except numeric

and date fields) will be checked. You can customize spell check to check only certain fields.

To open the Spell Check setup screen, click on **Spell Check** from the Setup fly-up menu. The screen has 10 tabs, one for each screen that has a Spell Check button.

Figure 3-5  
Spell Check  
Setup



Each field name is displayed. Place a check mark to the right of the fields that you want to be checked.

You may also want to use this screen to add or delete words from the dictionary. To improve the speed of spell checking, the dictionary is divided into three sections: short words (1–8 letters), medium words (9–12 letters), and long words (over 12 letters). To add a new word, click on the **Add Word** command button. The new word will automatically be placed in the correct dictionary section. To delete a word from the dictionary, click on the column to the left of the word.

A black box in that column will mark the word for deletion next time miscellaneous data is reindexed.

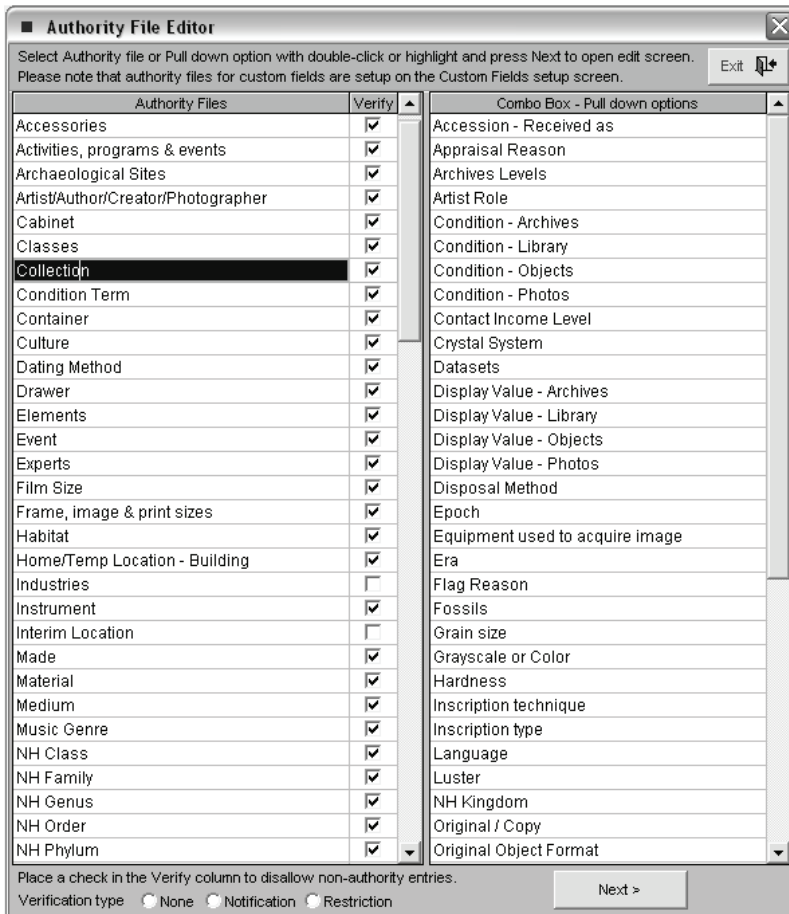
Words can also be added to the dictionary during the spell check process. If a word is encountered that is not in the dictionary, you will be given the option to add the word.

## STEP 8: CREATE AUTHORITY FILES AND COMBO BOXES

### Authority Files

PastPerfect uses authority files to help standardize data input. Common entries can be saved in each file. Authority files are available whenever you are add-

Figure 3-6  
Authority File  
Editor

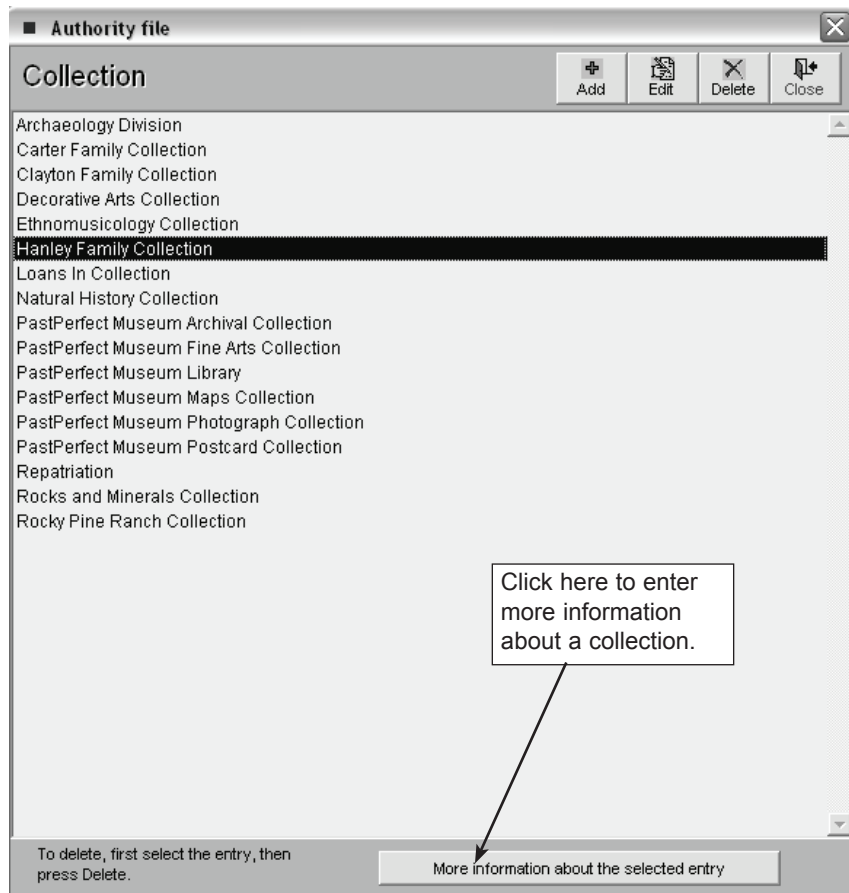


ing or editing catalog records. They are also available in Research mode. Select Authority Files on the Setup fly-up menu to open the Authority File Editor.

The authority files are listed in two columns, standard authority files on the left and combo boxes on the right. Standard authority files can be flagged for verification which means entries in their associated fields can be restricted to allow only terms listed in the authority file. At the bottom of the Authority File Editor screen you can select the type of verification you would like.: Restriction, Notification, or None. To open an authority file, select the authority file or combo box you wish to edit and press Next.

This will open the Authority File screen, where you can add or edit common entries for the field. To make a new entry, click on the **Add** command button and enter the name.

Figure 3-7  
Collection  
Authority File



Some authority files, such as the Collection authority file, have a button at the bottom of the screen labeled **More Information About the Selected Collection**, which will allow you to enter detailed information about the collection.

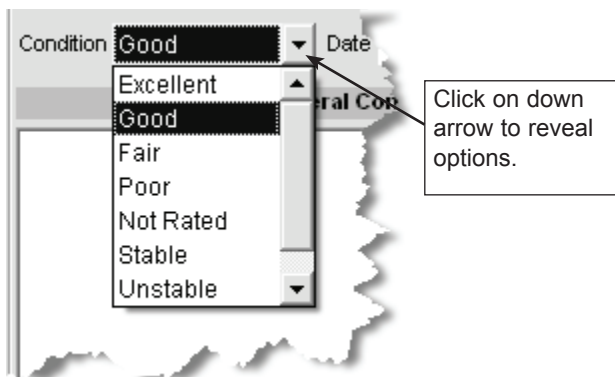
Some authority files come pre-loaded. For example, the Subjects authority file comes with the *Library of Congress Thesaurus for Graphical Material-Subject Terms (LCT GM I)*. For most authority files, however, you will need to make entries that are specific to your organization. You can always make additions to the files during the cataloging process, but for consistent data entry it is best to create the files before you start cataloging.

To use the authority files during data entry, place the cursor in a field with an authority file. A reminder on the bottom of the screen will say "Press Right-mouse or F7 to View Authority File." Press the F7 function key on the top row of your keyboard or click the right mouse button. A window will open displaying a list of common entries. From here you may add to the list, edit the list, or select an item to put in your catalog record by double-clicking on the selected item.

## Combo Boxes

Fields with combo box style authority files are designated by a down arrow at the right end of the field. Some of these fields are Condition, Status, Natural History Kingdom, Repatriation Type, and Maintenance Cycle. Combo box fields will only accept entries that are on the pull-down list.

Figure 3-8  
Condition  
Combo Box



You can add to or change the choices on these pull-down combo lists from the Setup | Authority Files screen.

For example, if you wish to edit the choices for the Condition combo box in the Objects catalog, in the Authority File Editor, double-click on Condition - Objects and the screen in Figure 3-10 will appear. The order of entry is the order in which items will appear on the pull-down list.

Figure 3-9  
Authority File  
Editor

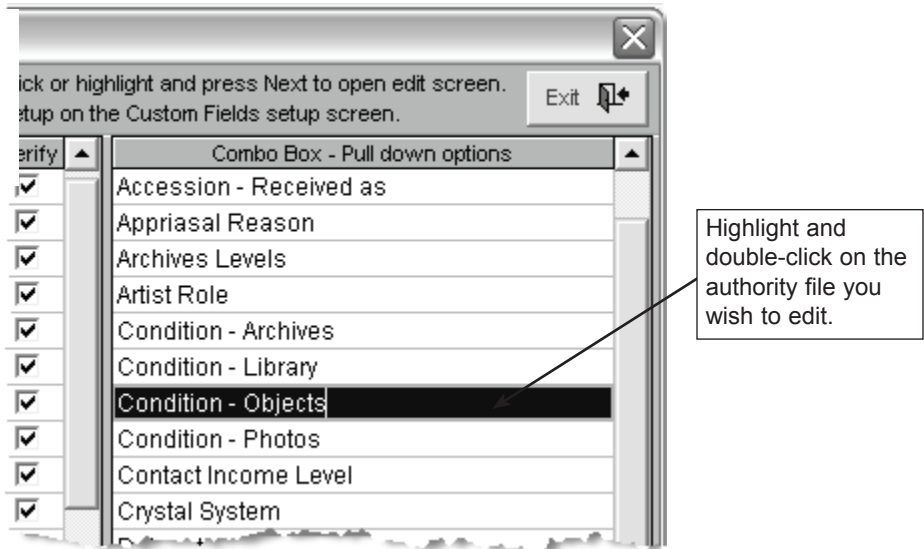
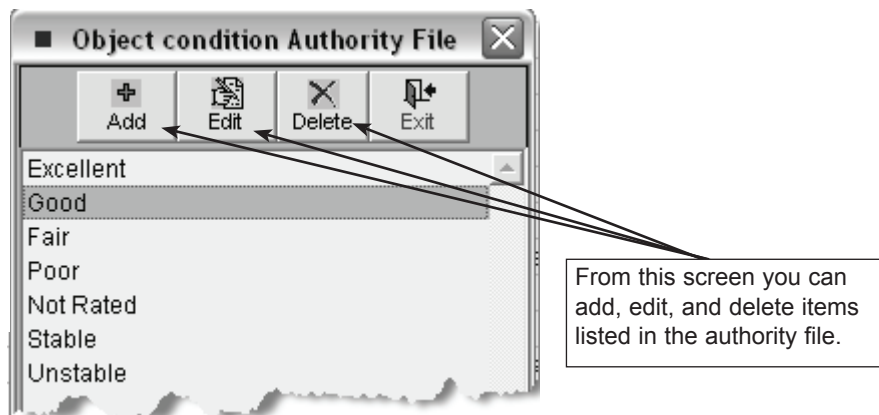


Figure 3-10  
Object  
Condition  
Authority File



## STEP 9: SET UP YOUR FUNCTION KEYS

The function keys on the top row of your keyboard, F1–F12, provide single-key input of common words or phrases. The Function Key setup screen is accessed from the PastPerfect main menu by opening the Setup fly-up menu and clicking on the Function Keys command button. This will open the screen where you can set up the function keys. The keys F3–F6 and F9–F12 can be redefined as often as you like. The F1 key is used to access help, F2 is reserved as the Save key, F7 is reserved for accessing authority files, and F8 is set as today's date. To set up the other keys, enter text to the right of the key.

The entries are made on the screen shown below and can be changed as often as you like.

Figure 3-11  
Assign  
Function Keys

Function Key	Assigned Text
F3	Examined. Found in good condition.
F4	All copyrights belong to PastPerfect Museum
F5	
F6	
F7	Reserved for Authority File Access
F8	[Date]
F9	
F10	
F11	Richard Hilton
F12	MLP

Enter text or phrase to be entered when the function key is pressed.  
For today's date enter "[Date]"

Exit

## STEP 10: SET UP SECURITY

With PastPerfect, password protection is optional. If you desire, you can activate password protection to restrict unauthorized persons from the PastPerfect program or various screens and features. You can decide which screens a user can access and whether or not they have the option to add, edit, and delete records or to view values and storage locations. To implement protection, each user's name and password must be entered. Passwords can be up to ten characters and

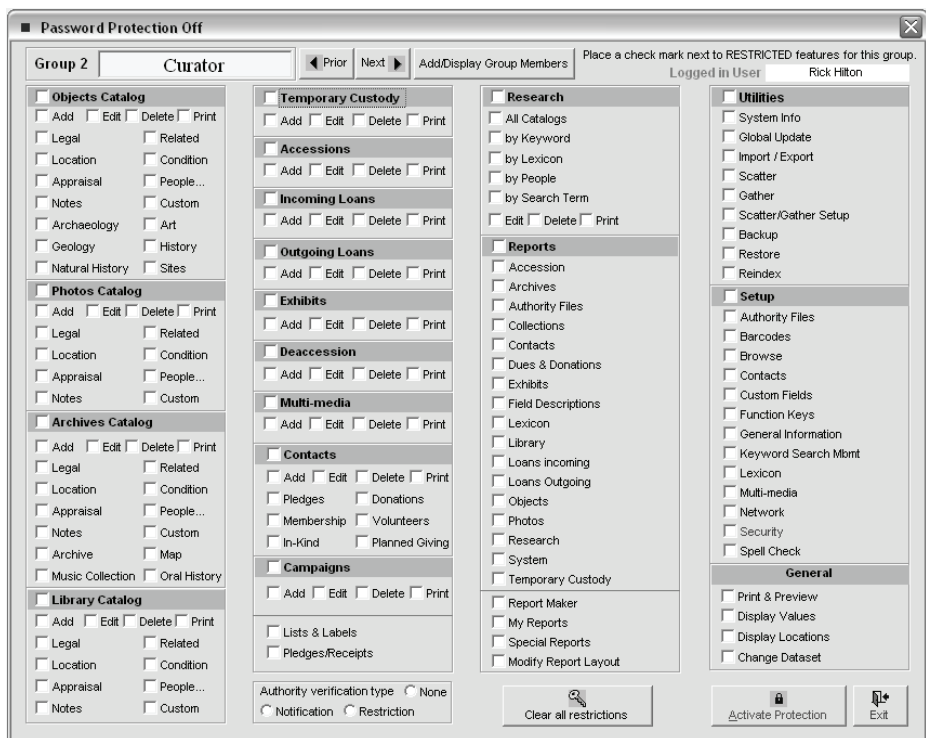


are not required for all users, such as Guests. Protection is managed by assigning each user to a group and then restricting groups from various features.

Ten groups can be defined and an unlimited number of users can be assigned to the groups. PastPerfect comes with some pre-loaded group names. These group names can be changed to suit your needs.

The first step is to decide which screens and features each group should have access to. To restrict access for a group, select the group with the **Prior** and **Next** buttons, then place a check next to items they should *not* have access to.

Figure 3-12  
Password  
Protection

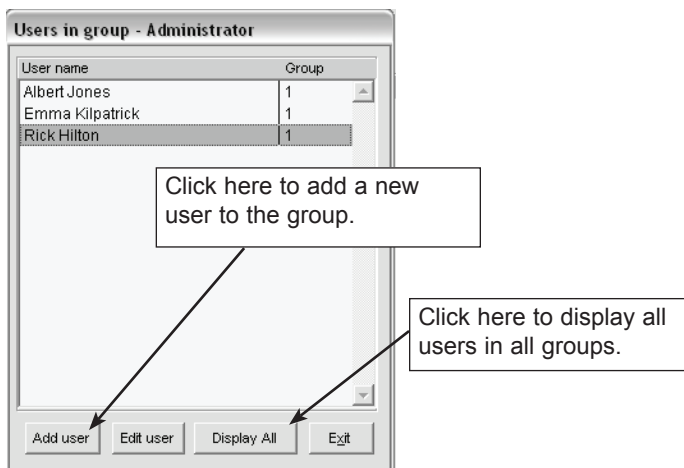


Next, you need to add your users' names to the appropriate group. This is done with the **Add/Display Group Members** command, which reveals the screen shown in Figure 3-13.

When security is activated the authority file verification setting and the function key settings that we mentioned earlier can be different for each user. Also, the

default data screens that we will talk about in later chapters can be different for each user.

Figure 3-13  
Users in  
Group



The final step is to click the **Activate Protection** command button at the bottom of the screen. Now, when starting the program, each user will be asked to pick his or her name from the user list and enter his or her password.

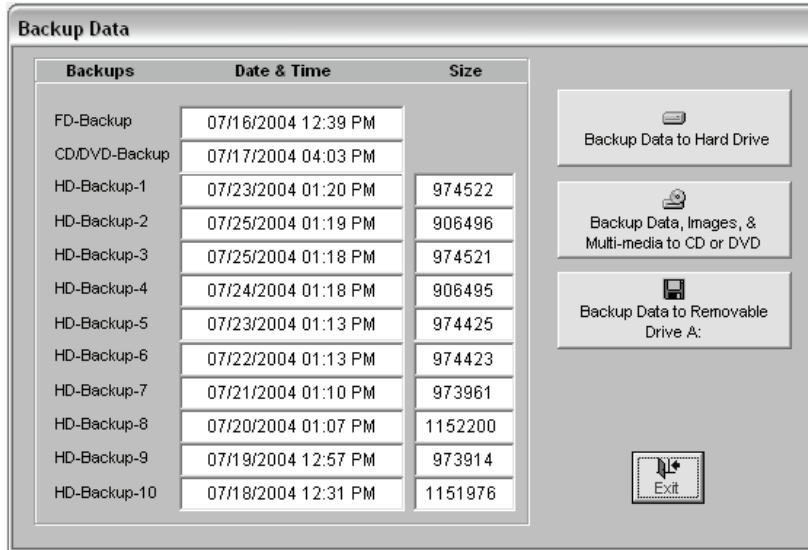
## STEP 11: DEFINE A BACKUP ROUTINE

This is the most important step of all. You will be spending many hours of your valuable time entering data into PastPerfect. Sooner or later you will have a problem with the computer. Hopefully, it will not affect your precious data, but it might-and you certainly don't want to start over.

**We highly recommend that you backup your PastPerfect data *every day*.** We have included a backup function in the program that makes it very easy to create a backup. The function only takes a few minutes and may someday save you hundreds or thousands of hours.

From the main menu, you can backup the PastPerfect data to either your hard drive, or a removable drive such as a floppy disk, Zip disk, CD-R, or DVD-R. The hard drive backup is great for quick recoveries and we recommend that you use it on a daily basis. However, if your hard drive fails it will be of no use. Or imagine if you come to work one day and the entire computer has been stolen.

Figure 3-14  
Backup  
Screen



The best way to ensure the safety of your valuable data is to back it up at least once a week onto a CD, DVD, floppy or Zip disks and store it somewhere safe, away from the museum.

The most reliable option is to use a writable CD (CD-R). This is a very stable storage medium and one CD will probably hold all of your data, images, and multi-media files.

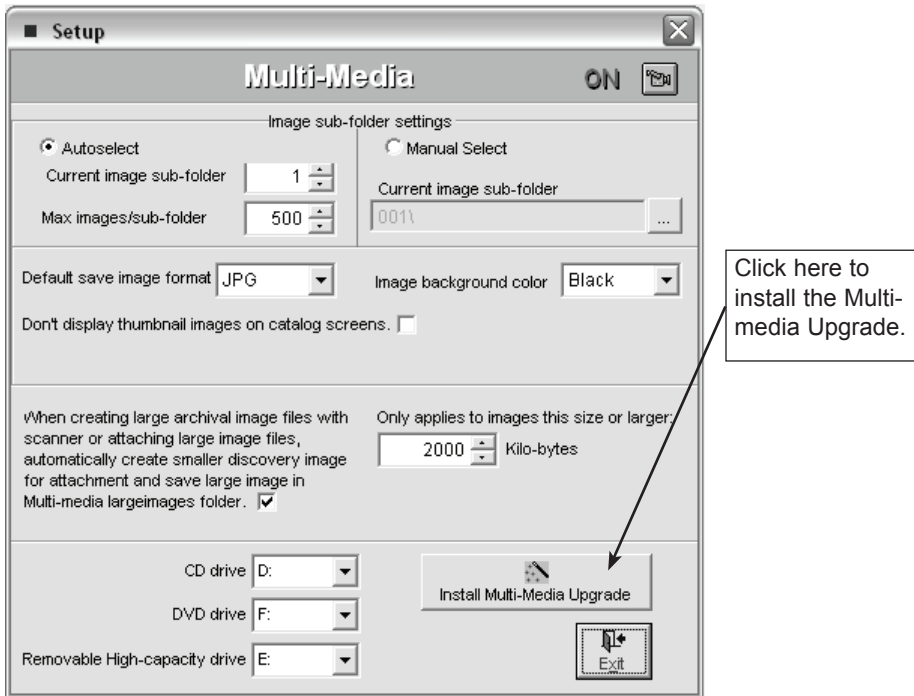
## INSTALLING OPTIONAL FEATURES

### 1. INSTALL MULTI-MEDIA UPGRADE

The Multi-media Upgrade can be purchased for an additional cost. You will receive a floppy disk or CD that you can use to activate this feature. To start, click the **Multi-Media** command on the Setup fly-up menu to open the Multi-Media Setup screen.

Press the **Install Multi-Media Upgrade** command button and follow the instructions on the screen. You will be asked to insert the Multi-Media Upgrade disk to complete the process. For detailed instructions on setting up and using the multi-media features, please read *Chapter 19, Multi-media*.

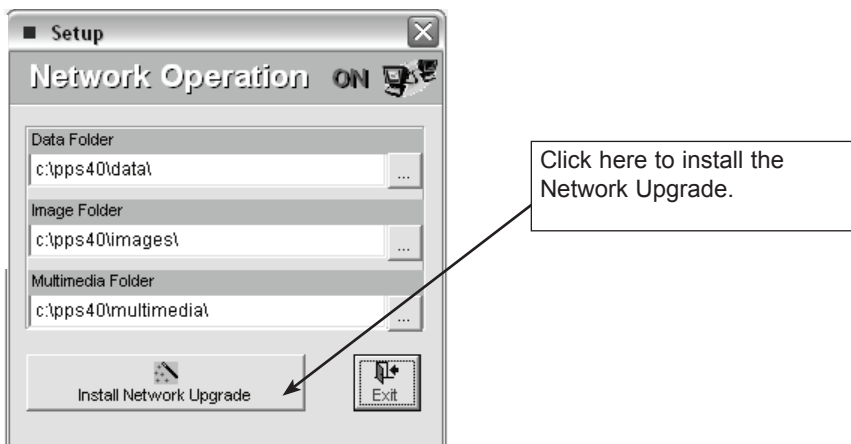
Figure 3-15  
Multi-media  
Setup



## 2. INSTALL NETWORK UPGRADE

A Network Upgrade can be purchased for an additional cost. You will receive a floppy disk or CD that you can use to activate this feature. To start, click the **Network** command button on the Setup fly-up menu. The Network Operation screen will display.

Figure 3-16  
Network  
Operation



Click the Install Network Upgrade command and follow the instructions on the screen. You will be asked to insert the Network Upgrade disk to complete the process. With network operation activated, multiple computers will be able to share the same common data, image, and multi-media files. For instructions on installing PastPerfect on networked computers, please read Chapter 1.

### 3. INSTALL SCATTER/GATHER UPGRADE

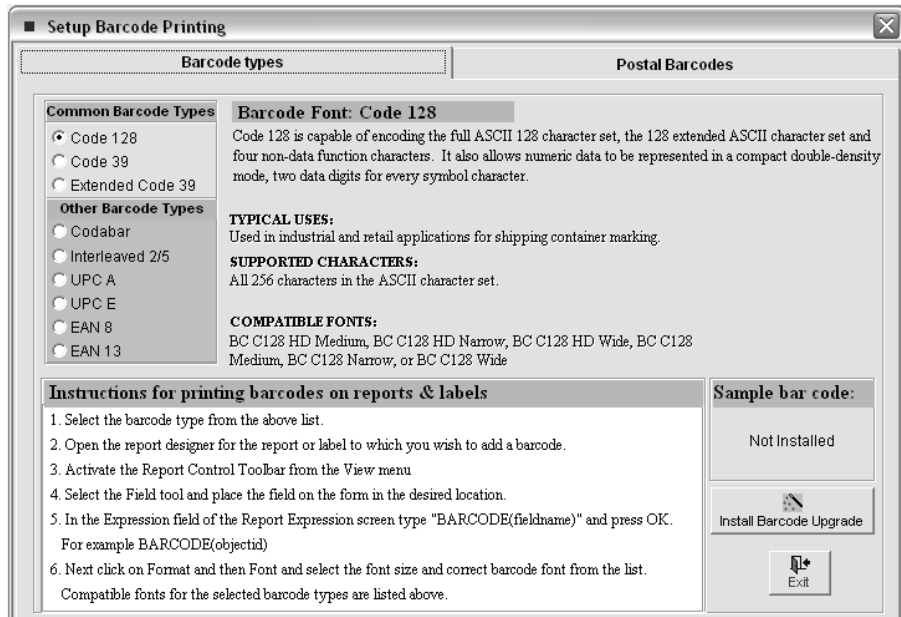
Scatter/Gather can be used to move catalog records from one non-networked computer to another. This option can be purchased for an additional cost. You will receive a floppy disk or CD that you can use to activate this feature. To start, click the Gen. Information command button on the Setup fly-up menu.

Next, select the **Unlock Add-on Options** command button and follow the instructions on the screen. You will be asked to insert the Scatter/Gather Upgrade disk to complete the process. For more information on using this feature, please read *Chapter 20, Scatter/Gather*.

### 4. INSTALL BARCODE PRINTING UPGRADE

The Barcode Printing option can be purchased for an additional cost. You will receive a floppy disk or CD that you can use to activate this feature. To start,

Figure 3-17  
Barcode  
Printing Setup



click the **Barcode Printing** command button on the Setup fly-up menu. The Barcode Printing Setup screen shown in Figure 3-17 will appear.

Next, click the **Install Barcode Upgrade** command button and follow the instructions on the screen. You will be asked to insert the Barcode Printing Upgrade disk to complete the process. For more information on using this feature, please read *Chapter 21, Barcode Printing*.

## 5. INSTALL EZMARC UPGRADE

The ezMARC import & export option can be purchased for an additional cost. You will receive a floppy disk or CD that you can use to activate this feature. To start, click Utilities on the main menu and then Import. Next press the **Install MARC Import/Export** command and follow the instructions on the screen. You will be asked to insert the ezMARC Upgrade disk to complete the installation. To finalize the installation, return to the PastPerfect main menu. For more information on using this feature, please read *Chapter 22 ezMARC*.

## ENTERING YOUR DATA

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Now that PastPerfect is configured for your organization, it is time to start entering your data. This is the recommended procedure:

### 1. CONVERT EXISTING DATA

If your data is already in a computer, it can probably be converted into PastPerfect. There is no need to re-enter this data. You may be able to convert the data yourself, or we can convert the data for you. We charge very reasonable rates for conversion services and can give you a free quote before we start the work.

Some of the data formats that we have converted include Access, Argus, ASCII, dBase, DIF, Excel, Filemaker Pro, Foxpro, MARC, MCMS, Mimsy, Minaret, Paradox, Q&A, Snap for DOS, and Snap for Windows.

For more information about how to convert your data and our conversion services, please visit our website at <http://www.museumsoftware.com> and click on **Services/Data Conversion**.

## 2. ENTER YOUR DONORS AS CONTACTS

We recommend that you start your data entry with the names and addresses of your frequent donors. This information should be entered into the Contacts screen. The Contacts file can act as an authority file for accessions. When you start entering accession information, instead of typing the names of these donors, you can select them from Contacts. For more information on entering data in the Contacts file, please consult *Chapter 16, Contacts*.

## 3. ENTER YOUR ACCESSION RECORDS

The PastPerfect Accession file contains the names and addresses of donors. Each record represents a single donation, which is defined as one or more items donated at the same time by the same donor. Each catalog record in Objects, Photos, Archives, or Library is associated with one accession record. Multiple catalog records may be associated with a single accession record. This relation frees you from having to enter the donor's name and address on each and every catalog record. It is entered just once in the Accession screen. For details on entering your accession records, see *Chapter 5 The Accession Process*.

## 4. CATALOG YOUR OBJECTS, PHOTOS, ARCHIVES, AND LIBRARY ITEMS

Finally, it is time to start the process of entering your catalog records. PastPerfect has four separate catalogs that provide specific descriptive fields for items in your collection. Chapters 6–9 provide step-by-step instructions for entering your records.

## 5. CREATE RECORDS FOR INCOMING AND OUTGOING LOANS

If you have items in your collection that were loaned to you from other organizations or individuals, you can set up incoming loans to record information about the loans. Read *Chapter 11, Incoming Loans*, for details. For items that you have loaned to others, we provide a file for outgoing loan information. Please read *Chapter 12, Outgoing Loans*, for details.

## 6. CREATE RECORDS FOR YOUR CURRENT EXHIBITS

PastPerfect provides a special section for tracking exhibits. One record can be created for each active exhibit. When cataloged items are listed on an exhibit, a

special flag is placed on the catalog record. PastPerfect will also help you print exhibit labels and keeps a history file of past exhibits. *See Chapter 13 Exhibits.*

## 7. SET UP YOUR CONTACTS, CAMPAIGNS, AND MEMBERS

PastPerfect will also help you with development. The contacts section allows you to create mailing lists and produce labels and letters to solicit donations and members. Campaigns can be defined and pledges monitored. Current members can be entered along with their dues amounts and date paid. Before entering names and addresses you should define your membership types and the funds that are available for donations. You can also compose your mail-merge letters. Details on setting this up are in *Chapter 16, Contacts.*