

How do I create a data map to provide to PastPerfect conversion services?

The first step in converting data from one program to another is to create a data map. A data map is essentially the list of fields from your original database and the corresponding PastPerfect fields where the information will reside. A detailed data map will ensure you the best possible price and results for your conversion. We are happy to review your data map before your conversion starts.

Data maps can be created in Excel, Word, or any other word processing program. Before creating a map, make sure you understand what information is contained in each of your current data fields and the available fields in PastPerfect.

When creating your data map, we recommend creating a four-column list:

- Column 1: List every field name in your database, even if you are not sure the field is being used. Each field should have its own separate line.
- Column 2: List the PastPerfect field names that correspond with the information in each of your current database fields.
 - For a complete description of all PastPerfect data fields, please view the Field Description reports found on our website: <https://museumsoftware.com/descriptions.html>.
 - PastPerfect uses separate databases for Objects, Photos, Archives, Library, Contacts, Dues, Donations, Accessions, Exhibits, Incoming Loans, and Outgoing Loans. There is a separate Field Description report for each database.
 - Each report lists the field names, a detailed description of the data to be stored in the field, and the type and size of the field. The field name is the term at the end of the description in brackets. For example, you may see the following listed on the Field Description Report:

Accession#	Use this field to record the accession number for the item. The accession number refers to the collection of items received from the same source at the same time. If the accession record has been created, the adjoining field will fill automatically with the name of the source. Typically, accession numbers are composed of the year the accession was received and a sequential number denoting the order in which the accessions were received in that year. For example, 2009.1 indicates the first object or group of objects received in 2009. [ACCESSNO: Character (15)]
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- In this instance, "ACCESSNO" is the field name you would include on your data map.
- If you are new to the program, it also might be helpful to see the fields on-screen as you are working on your data map. For Web Edition conversions, you may request a Web Edition Demo Site for your organization. For Version 5 conversions, you may download and install our free [Evaluation Version](#).
- Column 3: List the type and size of the field in PastPerfect. This information should be included so that you recognize the type of field where your data will reside.
 - Each field type and size is listed after the field name in the Field Description report. For example: [Character (15)] indicates a character field with a maximum length of 15 characters; [Numeric (10;2)] indicates a numeric field length of 10 with 2 decimal places (#####.##); [Date] indicates a date field; [Datetime] indicates a field containing both date and time; [Memo] indicates an unlimited character field.
- Column 4: Include any notes about the data in that field or modifications to be made when we convert it into PastPerfect.

- Explain any codes that might be in the data, especially if you want to bring in the full term rather than the code. For example, your membership types might be listed as I, F, and O in the data, but the actual types are Individual, Family, and Organization.
- Note what the separator is if you have multiple entries within one field. For example, you may have a People field that lists many different names. What separates one name from the next?
- List what unit of measurement is used for dimensions if it is not evident in the data.
- Include any notes on modifications you want to make when converting the data. See the “General Tips” and “Global Modifications” sections below for examples.
- If a field is not needed and should be skipped during the conversion, indicate it in this column.

*** Notes for Collections Conversions ***

- The Object ID and Object Name fields are required fields in PastPerfect and must be listed on the data map. You will need to match these two fields to corresponding fields in your current database.
- The Object ID for every catalog record must be unique across records in Objects, Photos, Archives, Library, and Deaccessions.

General Tips

While creating your data map, it is unlikely that all your database fields will match up perfectly. Here are some general tips to help you map your fields:

- Custom fields may be used for data that doesn’t fit well into an existing PastPerfect field. For Version 5 conversions, there are a limited number of custom fields: each catalog has 22 custom fields (12 character, 5 numeric, 3 date, and 2 memo fields) and Contacts has 13 custom fields (6 character, 1 date, and 5 numeric fields).
- Unlimited memo fields, such as Description or Notes, can be used to record additional data that doesn’t fit into an existing PastPerfect field. Remember these unlimited memo fields are searchable in PastPerfect.
- Using IF statements to populate data based on certain criteria may be feasible as long as the criteria is within your data. For example, perhaps you want us to put in “Unknown” if your Status field is empty; if your Status field has data in it, use that for PastPerfect’s Status field.
- If you want data from one of your fields to go into two separate PastPerfect fields (for example, Description and a custom field), you may list both PastPerfect fields in the second column.
- There may be instances where entries in your data exceed the character limit in the PastPerfect field. To accommodate this, you should take a close look at your data. If there are just a few entries that are over the limit, you may be able to shorten them. If there are many, you may want to consider mapping this data to a different field in PastPerfect.
 - If you still have data that exceeds the character limit of the mapped field, we will fill in the desired field with as much as it can hold, and then put the whole data into the Notes field (e.g. “Home Location/Container Overflow: [your whole field]”).
- If you want us to populate an authority file for a particular field, either with the entries in your data or a separate list, please note it on your data map in the Notes column. By default, we do not populate authority files unless specified by the client or required by the program (such as People, Search Terms, Received As, Funds, Campaigns, Membership Types, etc).

Global Modifications

You may want us to modify your data slightly when it is transferred to PastPerfect. Here are some of the modifications that may be possible:

- Adding a prefix before your data, especially if the data is going into an unlimited memo field. For example, you may have a field for Color, which is not a field in PastPerfect. If you decide to include this data in the Description field, it would make more sense if it was listed as “Color is green” or “Color: green”, rather than just “green.” Please list any prefix as you want it to appear in your converted data (spelling, capitalization, punctuation, etc.) in the Notes column of your data map.
- Adding a suffix after your data. For example, listing units of measurement after dimensions in character or memo fields. Please list any suffix as you want it to appear in your converted data, (spelling, capitalization, punctuation, etc.) in the Notes column of your data map.
- Combining two or more of your fields into one PastPerfect field. Make sure to explain the format of how the two fields should be joined (order, anything between the two pieces of data, etc). For example, you may have two fields for an artist’s name and want them combined and placed in the Creator field, so you could add “Format: ArtistLast, ArtistFirst” in the data map Notes column.
- Populating certain PastPerfect fields globally or based on a condition with text that is not in your original data. For example, if all items in your conversion should be listed as a part of the “Artifact Collection,” indicate this in the Notes column for the Collection field.
- Splitting data from a single database field into multiple PastPerfect fields may be possible, but it will depend on the data and how your original field is formatted. If this is something you want us to consider, please ask about it on the data map in the Notes column.

Example:

Here is an example of a data map for converting data to the Objects catalog. Please note that you may have more fields to map in your data than appear in this example.

Your database field	PastPerfect field	Type	Notes
Catalogno	Objectid	c25	
Name	Objname	c40	
Location	Homeloc	c60	Populate homeloc authority file with entries
Cataloged	Catdate	date	
ArtistFirst	Creator	c80	Format: ArtistLast, ArtistFirst
ArtistLast	Creator	c80	
MadeOf	Material	c75	
Date	Date	c50	
Description	Descrip	memo	
Color	Descrip; udf2	memo; c75	Add prefix “Color is ” for Descrip
ItemStatus	Status	c20	If field is empty, put “Unknown” in Status
Copyright	Legal	memo	Add prefix “Copyright Date: ”
JNotes			SKIP – we don’t use this field
Subjects	Subjects	memo	Each subject is separated by a semicolon
MarkedPos	Udf1	c75	Use full text instead of codes: UL=Upper Left, UR=Upper Right, LL=Lower Left, LR=Lower Right
	Collection	c75	Add “Artifact Collection” for all records

Please create separate data maps for each type of data you will be converting, such as Objects, Photos, Archives, Library, Accessions, and Contacts.

If you have any questions or would like us to review your data map draft, please contact Jessica Meulendyk, Conversions Coordinator, at our Support Office, 1-800-562-6080 x1104 or email conversions@museumsoftware.com. Thank you for using PastPerfect!