# 18

UTILITIES

PastPerfect provides a variety of utilities that help you manage your collection data. There are nine Utilities. Two of them, **Backup** and **Reindex** are commands on the main menu. The other seven utility commands are on the Utilities fly-up menu. They are **System Information**, **Global Update**, **Import**, **Export**, **Scatter Data**, **Gather Data**, and **Restore Backup**. Scatter/Gather is an optional upgrade and must be purchased separately.

Figure 18-1
Utilities fly-up
menu

Click on the **Utilities** command button to open the Utilities fly-up menu.
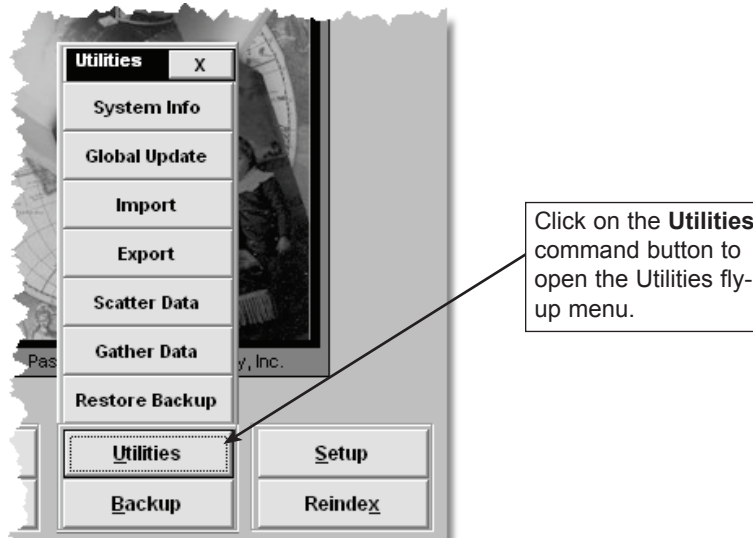
BACKUP

This Utility is the most important. It allows you to save up to ten sets of PastPerfect data onto your hard disk. The data is compressed into a WinZip-

compatible file to conserve disk space. Your data can also be saved onto removable media such as floppy disks, zip disks, or CD-Rs for off-site storage. Data, images, and multi-media files can be burned onto a CD-R or DVD-R.

We highly recommend that you backup your PastPerfect data *every day.* The process only takes a few minutes and someday, if disaster strikes, it will save you hundreds of hours. We urge you to perform both hard drive and removable backups. The hard drive backup is great for quick recoveries. However, if your hard drive fails, it will be of no use. The best way to ensure the safety of your valuable data is to back it up onto a CD, DVD, floppy or Zip disk and store it somewhere safe, away from the museum.

Figure 18-2
Backup screen

FD = floppy disk or removable Zip disk.

HD = hard disk.
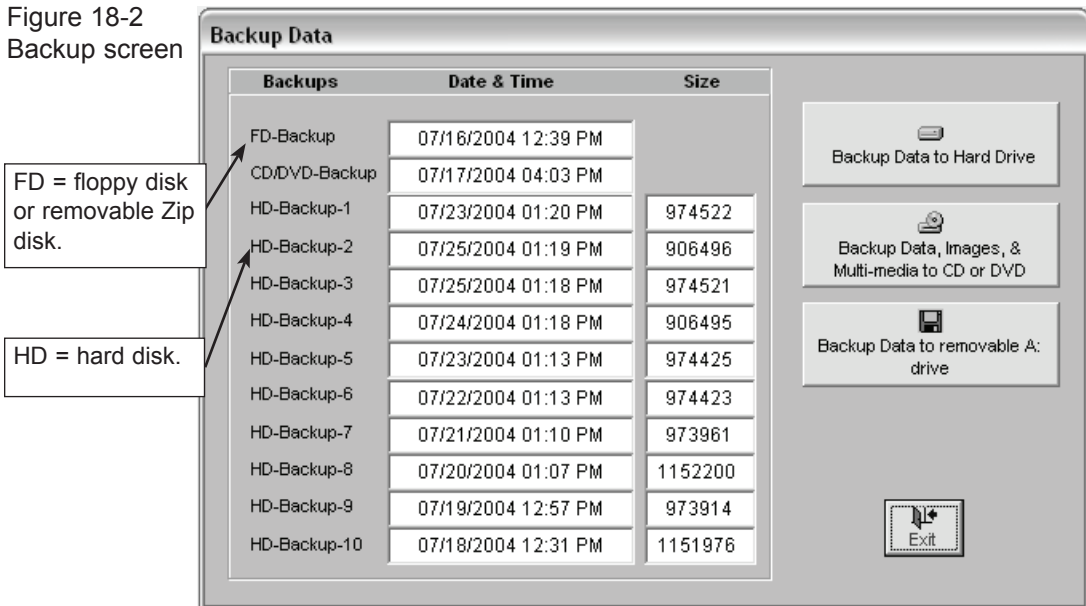
BACKUP DATA TO HARD DRIVE

To start the backup to hard drive, click **Backup Data to Hard Drive** on the Backup Data screen. The data will be compressed into one file named **PP4Backup.zip**. By default this file will be placed in the c:\pp4\backup folder on your local hard drive. When the backup is complete, the file size and date and time of the backup will be displayed. Hard drive backups are quick and easy. In a network environ-

ment with PastPerfect data residing on the file server, having each workstation backup the data to its own hard drive provides good security against data loss.

It is possible, but not recommended, to change the destination folder for hard drive backup files. The change can be made on the Setup | General Information screen.

Figure 18-3
Hard drive
backup folder

Hard Drive Backup Folder

c:\pps40\backup\   ...

Type in the folder name or click here to select an existing folder on your computer or network.

BACKUP DATA TO REMOVABLE DRIVE

To backup your data to a floppy or Zip drive, press the **Backup to Removable Drive** button on the Backup screen. If you are using floppy disks, each disk will hold about 4,000 catalog records. A zip disk may hold 25,000 catalog records. You will be asked to insert more disks as needed.

Before backing up to a floppy or Zip disk, you will need to enter the drive letter on the Setup | General Information screen.

Figure 18-4
Removable
backup drive

Removable Backup Drive   A: ▼

To backup to a Zip drive, click here to change the letter from A: (for your floppy drive) to the drive letter of your Zip drive.

BACKUP DATA & MULTI-MEDIA TO CD/DVD

PastPerfect can backup your data, images, and multimedia files directly to a CD or DVD. CDs are a very stable medium and it is highly recommend that you use this option if possible. For it to work, your computer or workstation must be equipped with a CD or DVD recording drive. You will also need a blank CD-R, CD-RW, DVD-R or DVD-RW disk.

To start the process, press the command **Backup Data, Images & Multi-media to CD or DVD** on the Backup menu. The screen shown in Figure 18-5 will appear where you can select the types of files to backup.

Figure 18-5
Backup to CD
or DVD

If you want to be sure the data on the CD can never be overwritten, check the Finalize option. Then press **Start Backup**. Be sure to place your backup disks in a safe place, preferably away from the museum.

RESTORE

This option will be required only if you experience hardware failure, encounter seriously damaged files, or if you want to transfer PastPerfect data to another computer.

To start the process, press **Restore Backup** from the Utilities fly-up menu. Then select the data set. Data may be restored from one of the ten sets of compressed data stored on the hard drive, or from floppies, Zip disks, or a CD/DVD created with the PastPerfect Backup command. When restoring from CD/DVD, you will have the option to restore, data, images, or multi-media files

Warning! Restoring data will erase all current PastPerfect data. Once data is restored, you *must* reindex all data using the main menu Reindex command.

If you restore images or multi-media files, the files will be copied from the CD or DVD into the appropriate PastPerfect folder. Existing files with the same name will be over-written.

REINDEX

The Reindex screen allows you to reindex data files for any or all of the 18 data file groups. Reindexing should be performed on a regular basis-at least once a week. This process will delete any records marked for deletion, rebuild the indexes that speed searches, and rebuild the People and Search Terms authority files.

Figure 18-6
Reindex
screen
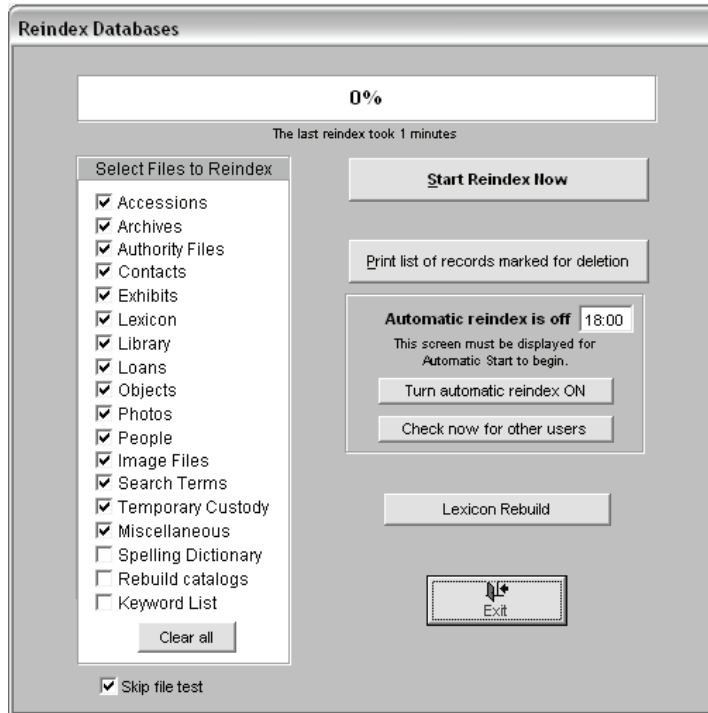
By default, the first 15 file groups are selected for reindexing. The last 3 groups, Spelling Dictionary, Rebuild Catalogs, and Keyword list are selected optionally. To add or remove a group from the list, click the check mark next to the file group name. You may want to click on the **Clear All** command button to remove all check marks, and then place a check on the file groups you wish to reindex. In most situations it is recommended that you reindex all files.

Before you start the reindex process, you may want to print a list of records that are marked for deletion. Reindexing will permanently remove these records. To print this report, click on the **Print List of Records Marked for Deletion** button.

Lexicon Rebuild - Use this command button to make sure that all your object names are assigned a Lexicon main and sub-category. This procedure should be run whenever you have imported data from another program. Object names that are not found in the Lexicon will be marked as Need to Classify. Please see Chapter 10 for more information.

Skip file test - this option on the Reindex menu allows the Reindex process to commence without first testing the structure of all data files. Normally this box should not be checked. Some operating system settings and virus protection software report errors when the file structure is checked thus requiring the function to be skipped.

SYSTEM INFORMATION

The **System Information** screen displays the program version number and activated features. It also lists each database record count and the total number of items in your collection.

Figure 18-7
System
Information
screen

From this screen, you can view or print the PastPerfect error log. This log contains detailed information about any errors that occur in the program. To help resolve problems, PastPerfect support technicians may ask you to send them a printout of this log. From this screen you can also print or view the Update Notes file. This file contains information about recent changes in the program.

Periodically, free updates will be posted at our website. If your computer can connect to the Internet, you can click on the **Download Latest Update** button to learn about the new features and download the update file.

GLOBAL UPDATE

This choice on the Utilities fly-up menu provides you with the power to make sweeping changes to your data. Global changes can be made to the Objects, Photos, Archives, Library, Contacts, Temporary Custody, Accession, Loans in, Loans out and Exhibit file. This screen also provides a powerful Command Window where you can manipulate the raw data in all PastPerfect data files.

Due to the possibility of massive changes or deletion of data, access to this screen should be limited. *Warning! Before making any changes you should always backup your data.*
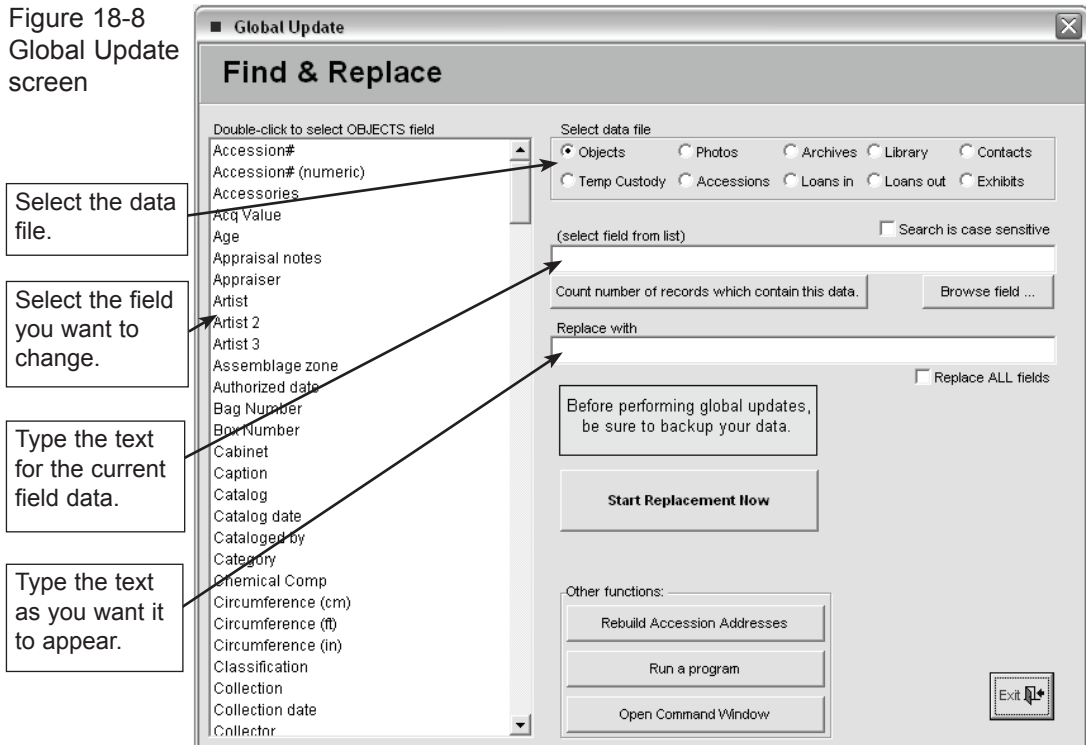
The first step in making a global change is to select the data file you want to work with. The list of fields to change will be updated based on the file you select. Next, select the field in the box labeled "Search..." and enter the text that appears in the field that you want to change. Then, in the box labeled "Replace with" enter the text as you want it to appear. You may want to press the **Count number of records which contain this data** to give you an indication of the scope of the change.

If you want to replace the fields in all records with the "Replace with" entry, put a check in the box labeled "Replace All Fields". If there is no check in that box then only records whose current entry in the selected field matches your entry in the "Search..." field will be replaced.

Finally, press **Start Replacement Now** to make the change.

Rebuild Accession Addresses - pressing this command will update the address, phone, e-mail, and website information in the Accession file from the associated contact's information.

Figure 18-8
Global Update
screen

Select the data
file.

Select the field
you want to
change.

Type the text
for the current
field data.

Type the text
as you want it
to appear.

Run a program - you may be sent a program, prepared by Pastime Staff, to perform a complicated global update. If so they will instruct you on how to use this option.

THE GLOBAL COMMAND WINDOW

This powerful window can be opened from the Global Update screen with the **Open Command Window** button. From this window you can enter commands to view or manipulate PastPerfect data. The commands that you need to enter are not exactly English, but pretty close to it. The command language is Visual Foxpro. If you have experience with either Foxpro or dBase, you will have the ability to manipulate your raw data.

The window is basically a blank line in which you type the commands. Once the command is typed, click **Submit** to execute. You can use **Clear** to start a new command. If you are unfamiliar with dBase or Foxpro commands, you should avoid this screen. *Remember to backup your data before performing any Global command.*
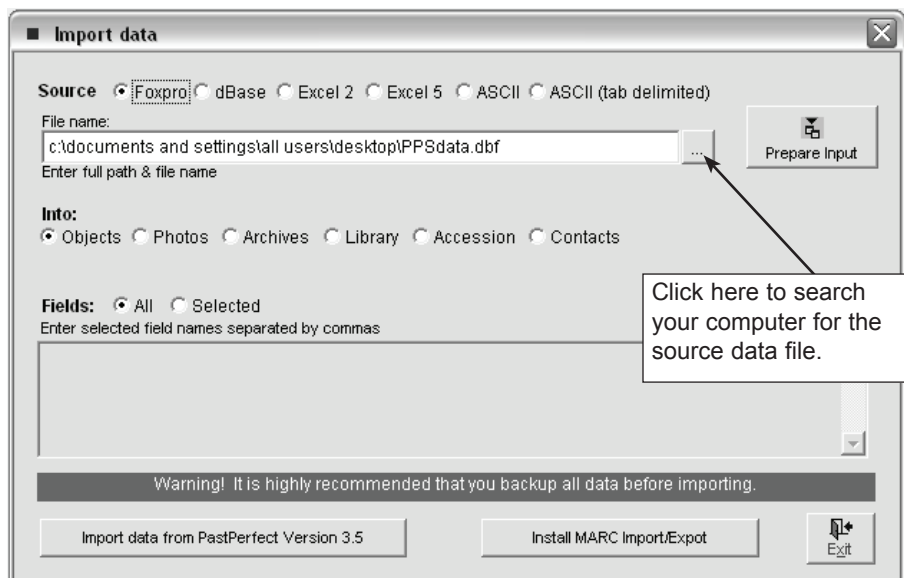
Figure 18-9
Global Com-
mand Window

IMPORT DATA

PastPerfect provides easy portability of your data with the data import and export functions. You might want to use Import to load data from other applications. To open the Import Data screen, click **Import** in the Utilities fly-up menu.

Figure 18-10
Import Data
screen

First, next to **Source**, select the format of the data you will be importing. The options are Foxpro, dBase, Excel 2, Excel 5, ASCII, or ASCII tab delimited. Data from Foxpro, dBase or ASCII are the preferred choice, since Excel has an import limit of 254 characters of information per field.

In the **File Name** window, enter the complete path and file name of the source data file, or click on the command button with three dots at the right of the window to browse to the source file.

In the bottom section of the screen, you must specify how the data will be loaded into PastPerfect. Select the appropriate file in the **Into** section. Choices are Objects, Photos, Archives, Library, Accession, or Contacts.

The next option is to choose **All** or **Selected** fields. If you choose Selected, you must then enter the field list in the box below. A comma should separate each field name, with no space after the comma. For example: objectid,objname,catdate, permloc,descrip.

Figure 18-11
Selected
Fields list

Fields: ○ All ◉ Selected
Enter selected field names separated by commas

objectid,objname,homeloc,condition,descrip
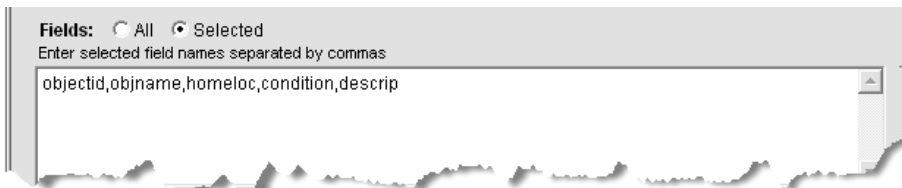
Then click the **Prepare Input** button. This will locate and analyze the input file and display information and options on the Pre-Import Information screen. Options here allow you to exclude duplicate records or records with blank id#. You may also narrow the selection of records by entering a Boolean filter statement. Press **Import Data Now** to complete the process.

Here are the steps to import data from the five possible formats:

dBase - This choice includes data from dBase III–V. Before you import the data, you must be sure that the field names in your data table match the field names in PastPerfect. When importing, only data in fields with names that *exactly* match the PastPerfect field names will be transferred. A list of PastPerfect field names for the seven tables can be printed from the Reports menu. The Field Descriptions reports describe the contents of each field. The name of the field appears at the end of the description in square brackets.

For example, the field for Accession# is listed as [accessno: c(15)]. This indicates that to transfer data from your file to the PastPerfect Accession# field, your corresponding data field must be named "accessno." The report also indicates that the field is a character field and will accept both letters and numbers up to 15 characters in length.

To change the names of your data fields, you will need to open the file with the dBase program and use the Modify Structure command. See your dBase documentation for more information.

Foxpro - This choice includes data from Foxpro version 2.5 through Visual Foxpro version 8.0. The procedure for importing from Foxpro is exactly the same as that for dBase, described above.

If you are importing data from dBase or Foxpro, you should always select All fields. Data with matching field names will always be put in the corresponding field.

Excel 2 - Use this to import data from Excel *worksheets* versions 2.0, 3.0, and 4.0. When importing from Excel you must use the Selected fields option to ensure that the data is transferred into the proper PastPerfect field. Enter the field names in the order they appear from left to right in your Excel worksheet.

For example, if your Excel columns A to E contain object ID, object name, home location, condition, and description, the field names should be entered as shown in Figure 18-11.

Excel 5 - Use this choice to import data from Excel *worksheet*s version 5.0/95 or 97/2000. As with Excel 2 you must use the Selected fields option.

Important Note: When importing data from Excel files, a limit of 254 characters per field is imposed. Fields with text longer than 254 characters will be truncated. Also note that to import Excel files, they must be saved as a Worksheet, not a Workbook.

ASCII - Use this option to import data from an ASCII delimited text file. This is a file in which each record ends with a carriage return and line-feed. Field contents must be separated from each other by commas. Do not include extra spaces before or after the commas. Character field values must be delimited by double quotation marks. For example:

        "97.001.0001","Pitcher","Good"
        "97.001.0002","Plate, Commemorative","Fair"

You can import dates from delimited files if the dates are in proper date format. The date format defaults to mm/dd/yy. Including the century portion of a date is optional. PastPerfect will import a date, such as 12/25/95, that doesn't include the century and assumes the date is in the 20th century. Date delimiters can be any non-numeric character except a comma.

ASCII (tab delimited) - This is almost identical to standard ASCII except that fields are separated by a TAB instead of a comma.

EXPORT DATA

The Export function is helpful because it enables you to transfer your data to other programs. It is important that you are able to extract your data whenever you want.

To start, click Export on the Utilities menu. The Export Data screen will appear.

Figure 18-12
Export Data
screen

Select the PastPerfect data file you want to export-Objects, Photos, Archives, Library, Accession, or Contacts. Next, choose to export all data fields or just selected data fields. To export selected fields, choose the Selected option and enter the field names below. Field names must be separated from each other by commas; be sure not to include extra spaces before or after the commas.

For example, to export just the Object ID, Object Name, Condition, Home Location, and Description fields for items in your Objects Catalog, the entry would look like this:

Figure 18-13
Selected
export fields

Fields: ○ All ● Selected
Enter selected field names separated by commas

objectid,objname,condition,homeloc,descrip

Remember, you must use the actual field names as listed in the Field Description reports, which is not always the same as the field label on the catalog screen.

Next, choose which records to export. You can export either all records or selected records based on a Boolean logical statement that you enter in the Filter statement field. For example, to export only the items with Accession number 2004.1, you would enter the following filter statement: [accessno="2004.1"].

Figure 18-14
Selected
records filter
statement

Records ○ All ● Selected
Filter statement

accessno="2004.1"

Filter statements must use the actual field names as listed on the Field Description reports, which is not always the same name as that listed on the catalog screen. Multiple conditions can be included in a filter statement linked with the word "and" or the word "or." For example, you could enter the statement [accessno>"2001" and accessno<"2005"] to export all catalog records for accessions within the years 2001 to 2004. Or you could enter the statement [homeloc="Storage Room #1" or homeloc= "Storage Room #5"] to export only catalog records with Home Locations of Storage Room #1 or #5.

Filter statements are case sensitive. Therefore, in the above example a statement of [homeloc="Storage ROOM #1"] would not produce the same results. If you want to avoid the case sensitivity, use the special UPPER command. For example, the statement [UPPER(homeloc)="STORAGE ROOM #1"] will export all records in that Home Location, regardless of the case of the entry.

To complete the Export process, click on the **Export Now** button. A message will display indicating the number of records exported.

NOTE

When importing or exporting data from Excel, each field is limited to 254 characters. In most cases this won't be a problem, except for fields like Description and Notes. For more information on how to import or export these long data fields, contact our support office.

SCATTER/GATHER

Scatter and Gather are intended for use by museums that enter data on two or more computers not connected by a network. The Scatter/Gather feature is used to select and transfer catalog records from one PastPerfect computer and merge them with records on another PastPerfect computer.

To use Scatter/Gather you are required to have or purchase the PastPerfect Scatter/Gather Upgrade. For detailed information on using Scatter/Gather please see Chapter 20.