2

THE BASICS

This chapter will teach you how to use the most common functions of PastPerfect. Detailed instructions for specific sections of the program will be given in later chapters.

STARTING PASTPERFECT

When PastPerfect was installed, this icon ![PPS IV] was placed on the Windows Desktop. To start PastPerfect, double-click on the icon. You can also start the program by clicking Start | Programs | PastPerfect Museum Software | PastPerfect 4.0.

MAIN MENU

Each time you start PastPerfect you will be presented with the main menu.

This menu consists of four large command buttons to open the main collection catalogs; Objects, Photos, Archives, Library and sixteen other command buttons. When you click on the commands Research, Utilities, or Setup, additional fly-up menu buttons are revealed. To access other screens, click on any of the command buttons.

By moving the mouse over a command button, additional information about the command will appear.

Figure 2-1
Main menu

If you are using password protection, all command buttons may not be available to all users. The label on a command button is dimmed if it is restricted.

BASIC COMMANDS

These are the basic command buttons that appear on many of PastPerfect's screens:

Figure 2-2
Command
buttons

Moves you backward to display the previous record. The Sort order setting described later controls the order in which you move through the data.

Moves you forward to display the next record. The Sort order setting described later controls the order in which you move through the data.

Adds a new record. The **Add New Record** screen will be displayed. This screen has different options depending on which section of the program you are in. Options may include Fill with Blank, Fill with Data from the

Current Record, or Fill with Default Data, which can be specified on a default data screen.

Displays multiple records on one screen in a tabular view. Each record occupies one row. Use the Tab key, Shift-Tab, or scroll bar to move right or left to view more fields. Use the scroll bar or Page Up and Page Down keys to quickly move to the desired record. Then press the right mouse key or Enter to display that record. The Sort order setting described later controls the order in which the data is displayed.

Figure 2-3
Browse
screen

Objectid	Objname	Collection	Home Location/Building
1997.2.1	Point, Projectile	Archaeology Division	PastPerfect Museum Main Bldg
1997.2.2	Point, Projectile	Archaeology Division	Museum Main Bldg
1997.3.1	Necklace	Repatriation	Museum Main Bldg
1997.6.2	Granite	Rocks and Minerals Collection	Museum Main Bldg
1997.6.3	Pyrite	Rocks and Minerals Collection	Museum Main Bldg
1997.6.5	Quartz	Rocks and Minerals Collection	Museum Main Bldg
1998.1.1	Painting	PastPerfect Museum Fine Arts Collection	Museum Main Bldg
1998.1.2	Painting	PastPerfect Museum Fine Arts Collection	Museum Main Bldg
1998.1.3	Print	PastPerfect Museum Fine Arts Collection	Museum Archives
1998.2.1	Clupea harengus	Natural History Collection	Museum Main Bldg
1998.2.2	Procyon lotor	Natural History Collection	Museum Main Bldg
1998.2.3	Quartz	Rocks and Minerals Collection	Museum Main Bldg
1998.2.4	Strombus pugilus	Natural History Collection	PastPerfect Museum Main Bldg
1999.1.11	Funnel	Rocky Pine Ranch Collection	PastPerfect Museum Main Bldg
1999.1.12	Sifter, Flour	Rocky Pine Ranch Collection	PastPerfect Museum Main Bldg
1999.1.13	Candlestick	Rocky Pine Ranch Collection	PastPerfect Museum Main Bldg
1999.1.14	Quilt	Rocky Pine Ranch Collection	Museum Main Bldg
2003.1.13	Ribbon, Commemorative	Hanley Family Collection	PastPerfect Museum Main Bldg
2003.2.1	Chair	Decorative Arts Collection	Carter Homestead House
2003.2.2	Teapot	Decorative Arts Collection	Museum Main Bldg
2003.2.3	Telephone	Decorative Arts Collection	PastPerfect Museum Main Bldg
L1998.1.1	Plate, Commemorative	Loans In Collection	PastPerfect Museum Main Bldg
L2000.1.1	Toy, Truck	Loans In Collection	PastPerfect Museum Main Bldg
L2000.1.2	Toy, Truck	Loans In Collection	PastPerfect Museum Main Bldg
L2000.1.3	Animal, Mechanical	Loans In Collection	PastPerfect Museum Main Bldg

Click here and drag left or right to adjust the column width.

Unlimited note fields are displayed with just the word "memo." If the word "Memo" is capitalized, the field contains information. To view the Memo field contents, just click on the word "Memo" with the mouse.

The width of each column can be adjusted for optimal viewing. To make an adjustment, point the mouse to the vertical line that separates the column headings, depress, and hold the left mouse button while dragging to the left or right.

You may not want all fields to appear on the Browse screen. For example, if your object collection does not contain art objects, you can remove the Accessory field from the screen. Or you may wish to change the order of the columns. These changes can be made from the Setup | Browse screen. Please see Chapter 3 for details.

By design, 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** from the Setup | Browse screen. 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.

Marks the current record for deletion. Records marked for deletion can be recalled with the **Recall** command button until the database is reindexed from the Utilities menu.

Press this command button to change data on the current record. When in edit mode, the background color of the field that is to be edited will change to light yellow. Not all fields can be edited on every screen. The text in uneditable fields will be greyed.

While in Edit mode, you can use the standard Windows cut and paste features to move text to and from other Windows applications or other fields within PastPerfect. For example, you may have a document in Microsoft Word that describes one of your objects. Rather than retyping that text, you can copy it from Word into the description field of the catalog record.

Figure 2-4
Edit | Cut and
Paste
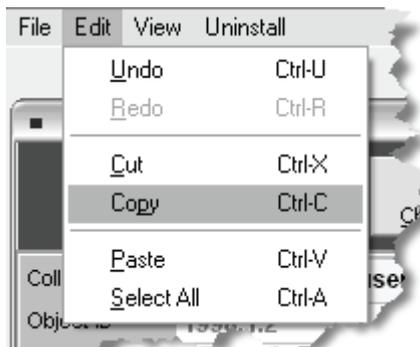
The cut and paste features are accessed from the Edit command at the very top of the screen. Shortcuts using the Control key are also available: Ctrl-X, Ctrl-C, Ctrl-V, and Ctrl-A.

Click this command button to check the spelling of entries in the current record. PastPerfect comes with a 195,000-word dictionary. When a word is encountered that is not in the dictionary, you will be presented with the **Spell Check Alert** screen. The field that contains the misspelled word

is displayed in bold above a text box containing the highlighted misspelled word.

Available options are to replace the word with one from the dictionary, replace the word with one that you type in the "Replace with:" field, add the word to the dictionary, or ignore the word and continue checking.

The Spell Check Alert screen has two other command buttons. **Exit & Save** will save any changes you have made in the current field and continue checking other fields in the record. **Cancel** will reverse any changes made to the current field and stop the spell check.

Figure 2-5
Spell Check
Alert
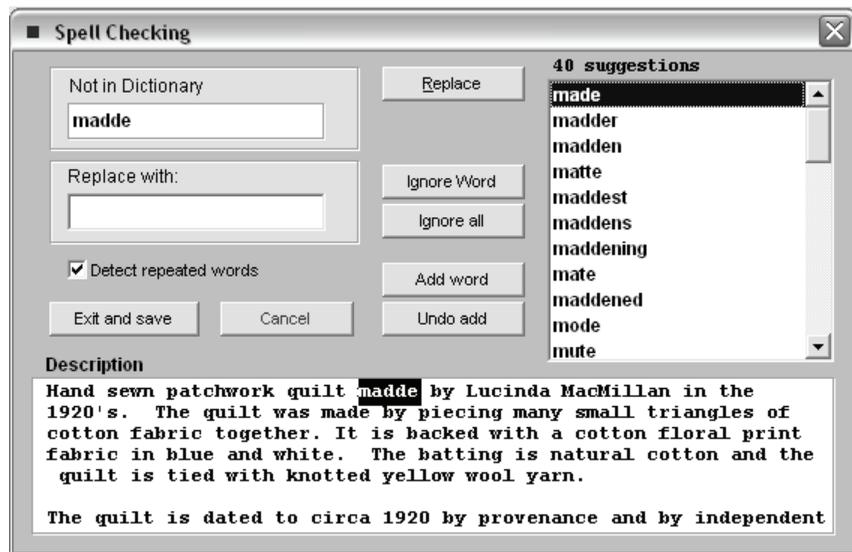
You can select which fields are included in the spell check on the Setup | Spell Check screen described in Chapter 3.

Opens the Find screen that allows you to search for records with text in a selected field. Some fields are pre-indexed for instant searches. To search an indexed field select the field to search from the list titled "by Index field". Then enter your search criteria in the box to the right and press **Find Now** to instantly locate the first record that matches your search criteria. Selecting a different index field changes the order in which your catalog records are sorted.

NOTE — When searching catalog records Find by Record# allows you to view that data in the order that it was entered. This could prove useful if you need to locate the last records added.

You can press the **Beginning** or **End of File** buttons to instantly move to that place in the data. Of course, the beginning and the end of the file will be different depending on the sort order (Search By) selection.

Figure 2-6
Find
screen

When using Find to search unindexed fields, rather than taking you to the first matching record, all matching records are displayed in the Search Results grid. Pressing **View Selected Records** will take you back to the database in a special mode viewing only those records. Also note that unindexed field searches perform a "contains text" search as opposed to the "begins with" search of indexed fields.

Sends the selected report or screen to the printer. If you have multiple printers connected to your computer or network, you will be able to choose the desired output destination.

Closes the current screen and returns to the previous screen. You can also use the Escape key on your keyboard to activate this command.

Here are some other command buttons that are common to many screens:

Click to select this tool and use the mouse to move it over a field. Then click again to display the definition of the field.
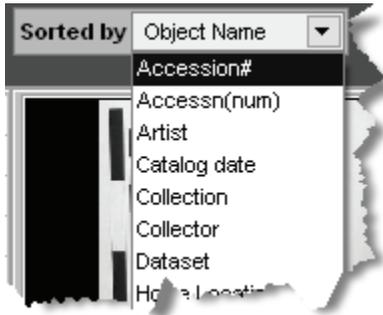
Sorted by allows you to choose the criteria for sorting the records. It changes the order in which records display when clicking the **Prior, Next,** and **Browse** commands.

Displays the associated Accession data screen with information about the source or donor of the item. All features from the Accession screen are available, including a list of items in the same accession and the option to print the accession record.

The Query command appears on the catalog screens and allows you to search for records based on the contents of selected fields. For more information about this command, please see *Chapter 14 - Research*.
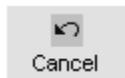
During editing, this cancels any changes you have just made. When adding a new record, this will cancel the entry. This button is used throughout the program to allow you to cancel a selected command before it is executed. You can also use the Escape key to activate this command.
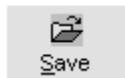
Saves the changes you have just made. You may press the F2 key at any time during editing to activate this command.

Recalls a record that has been marked for deletion.

Displays the selected report on the screen. From this display you will have the option to print the report.

Keyboard Access to Commands - Most command buttons can be activated by pressing the **Alt** key and the command hot key at the same time. The hot key is

the underlined letter on the button. For example Alt-F activates the Find command.

FUNCTION KEYS

The function keys on the top row of your keyboard, F1–F12, provide single-key input of common words, phrases, or the current date. F1, F2, and F7 are reserved for specific use. F3–F6 and F8–F12 can be redefined as often as you like from the **Function Keys** screen of the Setup folder. Each user can have his or her own function key assignments.

F1 Help - Use this key to view a list of field definitions.

F2 Save - Saves the changes you have just made. Press the F2 key at any time during editing to activate this command.

F3–F6 - User-defined.

F7 - Displays an associated authority file when adding or editing catalog records.

F8 - Assigned by default to enter the current date.

F9–F12 - User-defined.

Right Mouse Key - In Browse mode, closes the Browse window and displays the full screen for the highlighted record. Its use in Edit or Add mode can be defined to open the Cut & Paste menu or to access authority files - see chapter 3 for setup details.

AUTHORITY FILES

PastPerfect uses authority files to help standardize data input and retrieval. Common entries can be entered into each file. Over 100 authority files are provided for such fields as: Author, Artist, Classification, Collection, Content, Creator, Material, Medium, Object Name, People, Photographer, Places, Print Size, Storage Location, and Subject.

Authority files are available when you add or edit catalog records, and in Find, Query and Research modes. When the cursor is in a field with an authority file, a reminder on the top of the screen says "Press F7 to View Authority File." Press F7 on the top row of your keyboard or click the right mouse key. 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. Some or all authority files may be set as "Verified", thus restricting unauthorized users from entering data in those fields that is not contained in the associated authority file. Authority files may also be accessed for maintenance purposes under Setup - Authority files from the main menu.

Figure 2-7
Subjects
authority file

Some authority files are single entry, which means only one selection can be made from the list. Others, like the Subjects authority file, allow for multiple entries. You can choose either to append the newly selected entries to the existing entries in the field or to remove the existing entries and replace them with

the selected entry. If you place a check in the Multiple Entries box, you can select more than one entry before exiting back to the catalog record.

The **People** authority file is unique. It is automatically populated with people's names as they are entered into the People folder of the catalogs. The **Search Terms** authority file is similar to the People authority file and is also populated based on actual entries in the catalogs.

The People authority file has a special **Biography** command button that can be clicked to add, display, or print biographical information about the selected person.

COMBO BOXES

PastPerfect also provides combo box style authority control for fields such as Condition, Status, Rock type, and Artist role. These boxes allow you to select from a list of options. Unlike standard authority files, your entries are always verified and only entries from the approved list are allowed.

Figure 2-8
Combo box

The down arrow at the right end of the field identifies combo boxes. Click on the arrow to display the list of choices. The list of choices can be changed by selecting Setup - Authority Files from the main menu.

Now that you are familiar with the basics, it's time to get started using PastPerfect.