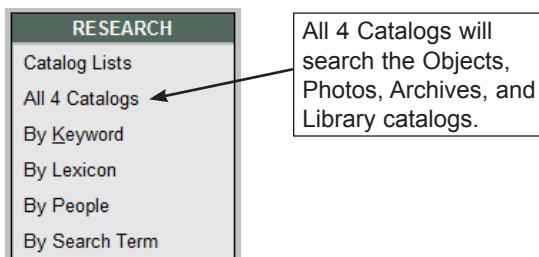# 14

# RESEARCH

Research is where all the hard work of cataloging pays off. Research allows you to develop insights and draw conclusions about your collections. PastPerfect can sort and organize your data in new and unexpected ways. If your catalog records have been entered carefully and consistently, you will enjoy performing searches of the collections.

Using the Research section on the Main Menu, you can access Catalog Lists, create queries using fields common to all four catalogs (Object, Photos, Archives, Library), and search by Keyword, by Lexicon, by People and by Search Term. You can also research records within each catalog by using the **Query** function in the Navigation Bar at the top of the Objects, Photos, Archives and Library screens.

Figure 14-1
Research
Options on
Main Menu

| RESEARCH |
| Catalog Lists |
| All 4 Catalogs |
| By Keyword |
| By Lexicon |
| By People |
| By Search Term |

All 4 Catalogs will search the Objects, Photos, Archives, and Library catalogs.

Once a catalog record or group of records is located through a search, you can view the catalog screens for each item, look at thumbnails of each item in a light box format, and print summaries, catalog cards, exhibit labels and detailed reports. There are also tools to export the results to MS-Excel and put the items on a Catalog List.

# CATALOG LISTS

Through Research, you can take advantage of one of PastPerfect's powerful tools to use your collections data. Catalog Lists enables you to create artifact lists, then perform actions on all of the lists' items. For instance, you can put all list items on outgoing loan or exhibit, or change their locations. Catalog Lists allows you to manage lists through folders, make lists public or private, and lock lists so they may not be changed. You can add items to lists right from the Catalog Lists section or use any of the other five research options. Please see *Chapter 15 - Catalog Lists* for detailed instructions on creating and managing lists.

# RESEARCH ALL CATALOGS

This section allows you to search all four catalogs at once using the fields common to all of the catalogs – Objects, Archives, Photos, and Library.



Figure 14-2 Search All Catalogs screen

To begin a search, click **All 4 Catalogs** in the Research section of the Main Menu. The Search All Catalogs screen will appear, as in Figure 14-2.

If you decide to limit your search by catalog, you can deselect catalogs by unchecking the boxes in the **Search Catalogs** section at the upper right of your screen. Only records from the checked catalogs will be included in your query results.
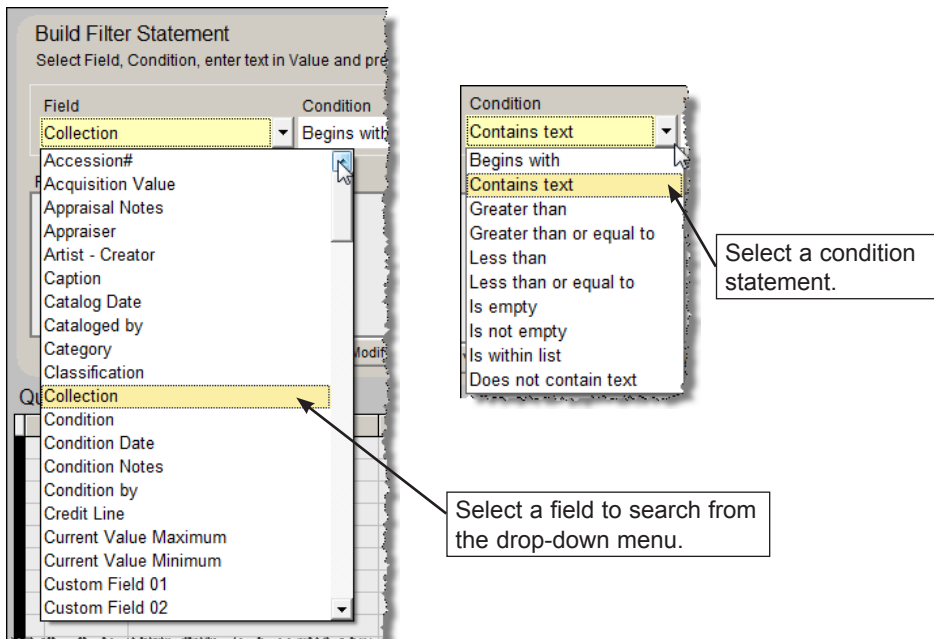
The Search All Catalogs screen enables you to build a filter statement from field and condition drop-down menus and using "and" and "or" operators to either narrow or expand the search.

To begin, choose one of the common catalog fields from the **Fields** drop-down menu. Then use the **Condition** drop-down list to pick "Begins with," "Contains text," "Greater than," "Greater than or equal to," "Less than," "Less than or equal to," "Is empty," "Is not empty," "Is within list," or "Does not contain text" to start the filter statement.

TIP    You may choose the fields that are available in the Field drop-down menu by going to the Main Menu | Setup | Query Fields section.

Figure 14-3
Field and
Condition
Drop-down
Menus



Build Filter Statement

Select Field, Condition, enter text in Value and pre

Field
Collection
Condition
Begins with

Accession#
Acquisition Value
Appraisal Notes
Appraiser
Artist - Creator
Caption
Catalog Date
Cataloged by
Category
Classification
Collection
Condition
Condition Date
Condition Notes
Condition by
Credit Line
Current Value Maximum
Current Value Minimum
Custom Field 01
Custom Field 02

Condition
Contains text

Begins with
Contains text
Greater than
Greater than or equal to
Less than
Less than or equal to
Is empty
Is not empty
Is within list
Does not contain text

Select a condition statement.

Select a field to search from the drop-down menu.

In the **Value** box to the right of Condition, enter the word or words (or dates, numbers, etc.) you want to find; capitalization is not important unless you check the **Match Case** box at the top right of the screen. Depending on the field being searched, you can access the authority file for that field. Please note the authority file icon in the upper right corner, which appears as a blue book with a prominent lower case "a" in front of it. You may right click in the value field or press **F7** on your keyboard to access the authority file.

Click on the **Add to Statement** button to add this filter statement to the query. If this filter is sufficient to find the data you need, click **Run Query to Select Records.**

In the example shown below, we searched the common field Collection for records that contain text "Rocky Pine Ranch Collection." The results were eight photographs, four objects, and two archival records.



Figure 14-4 Query Results showing filter statement

If additional conditions must be met to find the records you seek, do not run the query yet. Go back to the **Field** drop-down menu to select another field, choose a **Condition** from the drop-down list, and enter a **Value**. Now you must select an operator to connect both lines in the filter statement, either "and" or "or." Make your selection by clicking the radio button next to the appropriate option above the **Add to Statement** button. If you select "and," both conditions must be met for a record to appear in the results. If "or" is chosen, your results will contain records that meet either condition.

Once you have the field, condition, value and operator in place, click **Add to Statement**. Continue adding statements and choosing operators as needed. If you wish to remove a line of your filter statement, click on that line, then click the **Delete Selected Filter Statement Line** button, directly underneath the filter statements. When you have the entire filter statement created that will narrow the search, click **Run Query to Select Records**. If matching records are located, a list is displayed in a grid in the lower part of the screen as in Figure 14-4. If you decide to remove any records from the list, they may be marked for deletion by clicking in the far left column, then deleted from the list by using the **Remove Marked Records From List** button. This action only removes the items from search results. It does not delete records from the catalogs.

TIP  You may choose the fields that display in the Query Results by going to the Main Menu | Setup | Query Fields | Change Query Results Field List.

## VIEWING, PRINTING AND ACTING ON SEARCH RESULTS

The Sidebar on the left has tools for saving, viewing, and printing your search results. You have many of these same tools for all search options. Below you will find explanations for how to perform these actions, whichever research option you choose.

In the All 4 Catalogs **Actions** section, you can start a new query or save and retrieve queries. You can also put the search results from all research tools on a Catalog List.

**Start New Query** - Click this button if you wish to start a new query and leave the current query. If you want to go back to a query and reuse it, please be sure to save that query before clicking Start New Query.

**Retrieve Query** - This option enables you to select a previously saved query from the list or the last performed query, seen in Figure 14-5. Once a query has been retrieved, you may run it as is or modify it and then run it.

Figure 14-5
Retrieve
Saved Query



**Save Query** - Clicking the Save Query button allows you to save a query for later retrieval. The filter statement is saved so you can rerun the query. You will be asked to give the query a name by which it will appear on the list of all catalog queries.

**Save Results to List** - You can add your search results to an existing Catalog List. Please use the Catalog List Manager to first create the list. Then perform a search from one of the Research options, and choose the Action **Save Results to**

**List**. Choose the list to which you wish to add your query results, then click **Add Selected Records to List**. You will be prompted with the number of records that will be added to the list. If a record in your query results is already on the list, it will remain on that list.
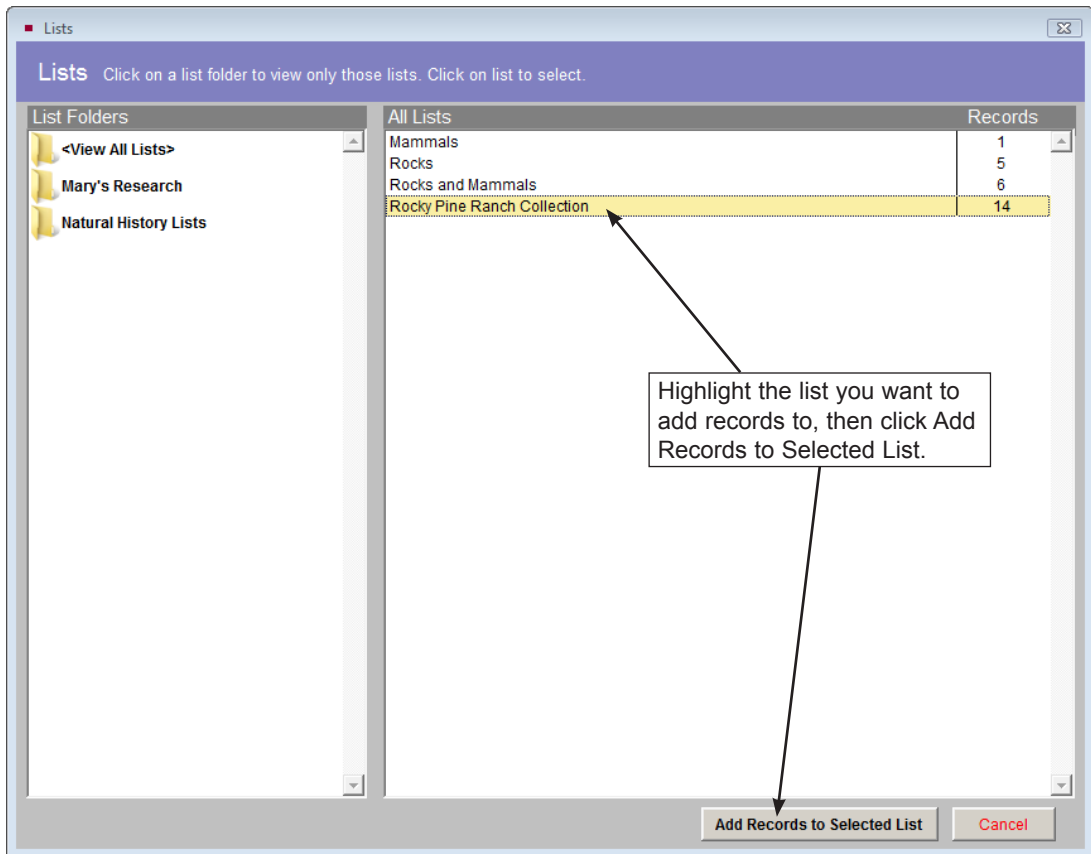


Figure 14-6 Save Search Results to a List

In the **View Results** section of the Sidebar, you can view the search results as full catalog records or in a light box format.

**View Records** - Use this button to view the catalog screens for each record in the search results. Most functions are available on the catalog screens, including displaying source information, editing data and attaching images. To return to the search, click the **Exit** button in one of the displayed catalog records.

**View Images** - The View Images option enables you to see an image thumbnail for each record in a light box format. If you wish to view the catalog record from the light box, click once on the thumbnail image. The View Image option is available when the MultiMedia Upgrade has been installed.
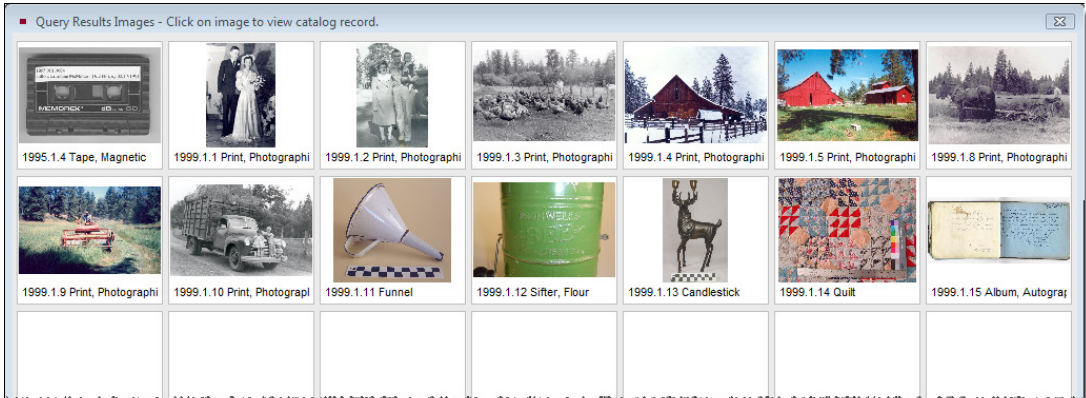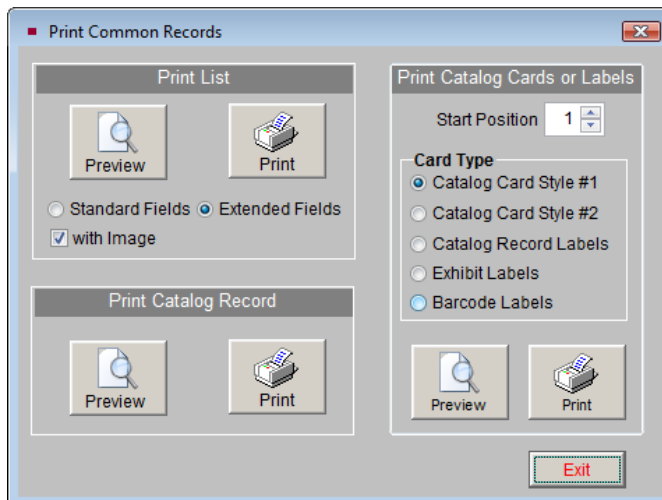


Figure 14-7 View Images of Query Results

The **Print/Export List** section has options for printing reports and exporting your results to MS-Excel.

Click **Print Results** to see the Print Common Records screen in Figure 14-8.

Figure 14-8
Print Common
Records screen

**Print List** - You can preview or print a list of all records that are in your search results. The list is either the Standard Fields or Extended Fields. The standard fields include Catalog, Object ID, Object Name, Description, Condition, Status, and Home Location. If you have attached digital images to the records using the optional MultiMedia Upgrade and wish to see thumbnail images on the report, check the "with Image" box. Please note that the Search Results Print List and Print Extended List are different reports when you include images.

**Print Catalog Record** - Prints the full catalog record of each of your search results, one record per page.

**Print Catalog Cards or Labels** - Allows you to print catalog cards, catalog record labels, exhibit labels, and barcode labels. Printing barcode labels is available when you have purchased and installed the Barcode Printing or Inventory Manager Upgrades.

The **Export to Excel** button in the Sidebar creates an Excel spreadsheet from the query results. Please specify an Export File Name and whether you wish to export the Standard Fields or Extended Fields. Standard fields include: Catalog, Object ID, Object Name, Description, Condition, Status, Home Location, and Imagefile Name, plus any other fields you have chosen to add to your All Catalogs Query Results Field List. Please see the tip later in this chapter for more information on how to change the Query Results Field List. If you choose to export Extended fields, the Excel file will contain all of the visible fields from your catalog records.

Figure 14-9
Export Query
Results or List
to Excel



Choose either Standard Fields or Extended Fields.
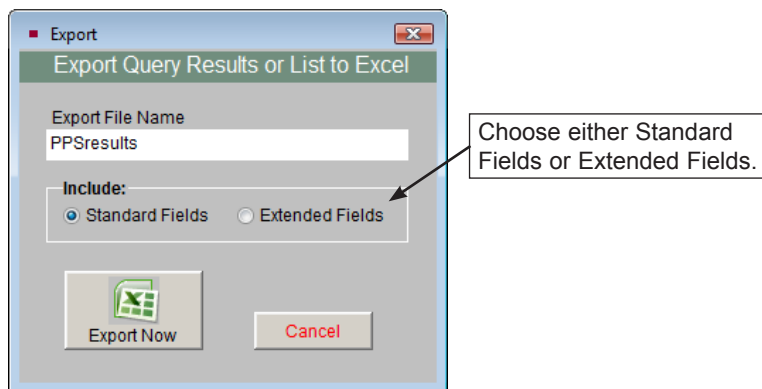
The file will open in HTML using your computer's MS-Excel. The file is saved in HTML (.htm) format and stored in the PP5Reports folder on your Local Disk drive (usually C). If you wish to save it as an XLS file, go to the Save As function in the Excel File menu and choose "Microsoft Office Excel Workbook" as the file type**.**

In the **Other Options** section of the Sidebar, you can include the query results records in a Web export to a PastPerfect-Online website and view a query history.

**Include on Web** - This option is available if you have purchased the PastPerfect-Online program. It enables you to add items in your query results to your Past-Perfect-Online site. All items in the results list will be included the next time you publish your data to the Web. For more information about PastPerfect-Online, visit the Products section of our website at www.museumsoftware.com.

**Query History** - This option gives you a list of the queries by date, user, what was searched for and numbers of records found in each catalog. If you have Security set up and activated with user names, you can see who has performed which queries. The list of queries may be previewed and printed.

If you do not wish to keep a complete list, you can mark queries for deletion and click **Delete Marked Queries**. You may also select queries to be deleted by date, by clicking the **Select Queries for Deletion by Date** button. You may enter a date, and queries older than that date will be deleted.

| Date | User | Searched for | Archives | Library | Objects | Photos | Total |
|---|---|---|---|---|---|---|---|
| 11/20/2009 11:30 AM | Unknown | Collection·Begins with·"Rocky Pine Ranch" | 2 | 0 | 4 | 8 | 14 |
| 09/21/2009 08:56 AM | Unknown | Accession#·Begins with·"1" | 3 | 8 | 17 | 9 | 37 |
| 08/06/2009 10:48 AM | Unknown | People: Bortner, Frances | 0 | 0 | 0 | 1 | 1 |
| 08/01/2009 01:12 PM | Unknown | Accession#·Begins with·"1995" | 1 | 0 | 0 | 0 | 1 |
| 07/31/2009 03:36 PM | Unknown | Keyword Search for: hilto* | 2 | 0 | 4 | 6 | 12 |
| 07/31/2009 03:08 PM | Unknown | Collection·Begins with·"Rocky Pine Ranch Collection" | 2 | 0 | 4 | 8 | 14 |
| 07/31/2009 02:39 PM | Unknown | Track·Equals·2 | 1 | 0 | 0 | 0 | 1 |
| 07/21/2009 04:04 PM | Unknown | Subject·Is not empty | 1 | 0 | 0 | 0 | 1 |
| 07/21/2009 04:03 PM | Unknown | Subject·Is not empty | 1 | 0 | 0 | 0 | 1 |
| 05/29/2009 12:14 PM | Unknown | Source·Contains text·"Hilton"·or | 3 | 8 | 17 | 9 | 37 |
| 05/29/2009 12:14 PM | Unknown | Source·Contains text·"Hilton"·or | 3 | 8 | 0 | 9 | 20 |
| 05/29/2009 12:14 PM | Unknown | Accession#·Begins with·"1"·or | 3 | 8 | 0 | 9 | 20 |
| 05/29/2009 12:13 PM | Unknown | Accession#·Begins with·"1"·or | 3 | 8 | 17 | 9 | 37 |
| 05/12/2009 12:31 AM | Unknown | Object Name·Begins with·"Letter" | 3 | 0 | 0 | 0 | 3 |
| 05/12/2009 12:30 AM | Unknown | People·Contains text·"bert" | 0 | 0 | 0 | 1 | 1 |
| 05/12/2009 12:29 AM | Unknown | Kingdom·Begins with·"ani" | 0 | 0 | 3 | 0 | 3 |
| 05/11/2009 11:40 PM | Unknown | Acq Value·Greater than·100.00 | 0 | 0 | 4 | 0 | 4 |
| 05/11/2009 11:33 PM | Unknown | People: Hilton, Richard L. | 0 | 1 | 1 | 1 | 3 |
| 05/11/2009 11:32 PM | Unknown | People: Bortner, William | 1 | 0 | 0 | 0 | 1 |
| 05/11/2009 11:32 PM | Unknown | Keyword Search for: washington | 1 | 0 | 2 | 11 | 14 |
| 05/11/2009 07:23 PM | Unknown | People·Contains text·"bert" | 0 | 0 | 0 | 1 | 1 |
| 05/11/2009 07:09 PM | Unknown | People: Hargity, Robert B. | 1 | 0 | 0 | 0 | 1 |
| 05/11/2009 05:13 PM | Unknown | Lexicon: Objname = Postcard | 6 | 0 | 0 | 3 | 9 |
| 05/11/2009 04:46 PM | Unknown | Title·Contains text·"bern" | 0 | 0 | 0 | 1 | 1 |
| 05/11/2009 03:54 PM | Unknown | People: Clayton, Perry | 0 | 0 | 0 | 2 | 2 |
| 05/11/2009 02:30 PM | Unknown | Keyword Search for: babbitt | 0 | 0 | 0 | 1 | 1 |
| 05/11/2009 02:23 PM | Unknown | Kingdom·Begins with·"ani" | 0 | 0 | 3 | 0 | 3 |
| 05/09/2009 11:58 PM | Unknown | Object Name·Begins with·"Book" | 0 | 16 | 0 | 0 | 16 |
| 05/09/2009 11:58 PM | Unknown | Object Name·Begins with·"Book" | 0 | 16 | 0 | 0 | 16 |

Click on column headers to change sort order.
Click on box to the left of row to mark for deletion.

Delete Marked Queries    Select Queries for Deletion by Date    Preview    Print    Exit

Figure 14-10 Query History screen

**Additional helpful tools:**

**Remove Marked Records** - Before you view, print, export or perform other actions on these query results, you can manually remove selected records from the results grid by clicking in far left column of the record to mark it. Then click **Remove Marked Records**.

**Clear Results** - Clears the search results, but leaves the existing filter statement. You can then add to or modify the filter statement and rerun the query.

# RESEARCH BY KEYWORD

To access this search method, click on the **By Keyword** option in the Research section of the Main Menu. You will see the screen shown in Figure 14-11.



Figure 14-11 Keyword Search screen

The Keyword search is an indexed search, meaning PastPerfect creates a word list from the entries in the Archives, Library, Objects, and Photos catalogs. If you have made a lot of changes to the catalogs and have not rebuilt the word list recently, you should click **Rebuild Indexes Now** to rebuild the index. This will ensure that the word list reflects recent changes to the catalog data. The last date on which the word list was rebuilt will appear in the box just above the **Rebuild Indexes Now** button. Please note that while other users can remain in the PastPerfect program, the Keyword Search cannot be used by any other users while you are rebuilding. Rebuilding may take several minutes.

## KEYWORD SEARCH MANAGEMENT

To increase the speed of searches and the time it takes to rebuild the index, you can select certain catalog fields to be included in the keyword search, rather than searching all fields. You can also create a list of common words like "and" and "the" that will be ignored. To make these changes, use the Setup drop-down menu from the Main Menu and select **Keyword Search**.

At the top of the **Setup Keyword Search** screen there are four radio buttons, one for each catalog. When you select the catalog, the list of fields available to be searched appears on the left side. Double click on a field to include it in the keyword search. The field will move to the **Fields to Include in Keyword Search** column. You can make all fields in that catalog available for searching using the button at the bottom of the **Available Fields** column. However, the fewer fields you include, the faster the rebuild process and the faster the searches. You may clear all the fields by clicking the **Clear List** button under the **Fields to Include in Keyword Search** column. Please be sure to set up your fields for each catalog.

On the right side at the top is a box listing valid characters that, in addition to the letters A through Z, you want to include in the keyword index. Characters other than the letters A through Z and those listed here will be ignored.

TIP

If you want to search dates using Keyword Search, you will need to enter the numbers 0-9 in the Valid Characters to Include in Keywords in Addition to A-Z box. Enter the numbers without anything between them, then rebuild the keyword index. Figure 14-12 shows this example.

There is also a box where you can list common words that should be excluded from the index. Words such as "and," "she," and "his" are so prevalent that including them would be meaningless. You may want to add common words specific to your organization, such as your organization's name. Enter the words separated by a comma, with no spaces as in Figure 14-12.

After creating the desired settings, click **Rebuild Indexes Now**. If you have a large number of catalog records, this function may take several minutes. Other network users will not be able to do keyword searches while the rebuild is in progress.
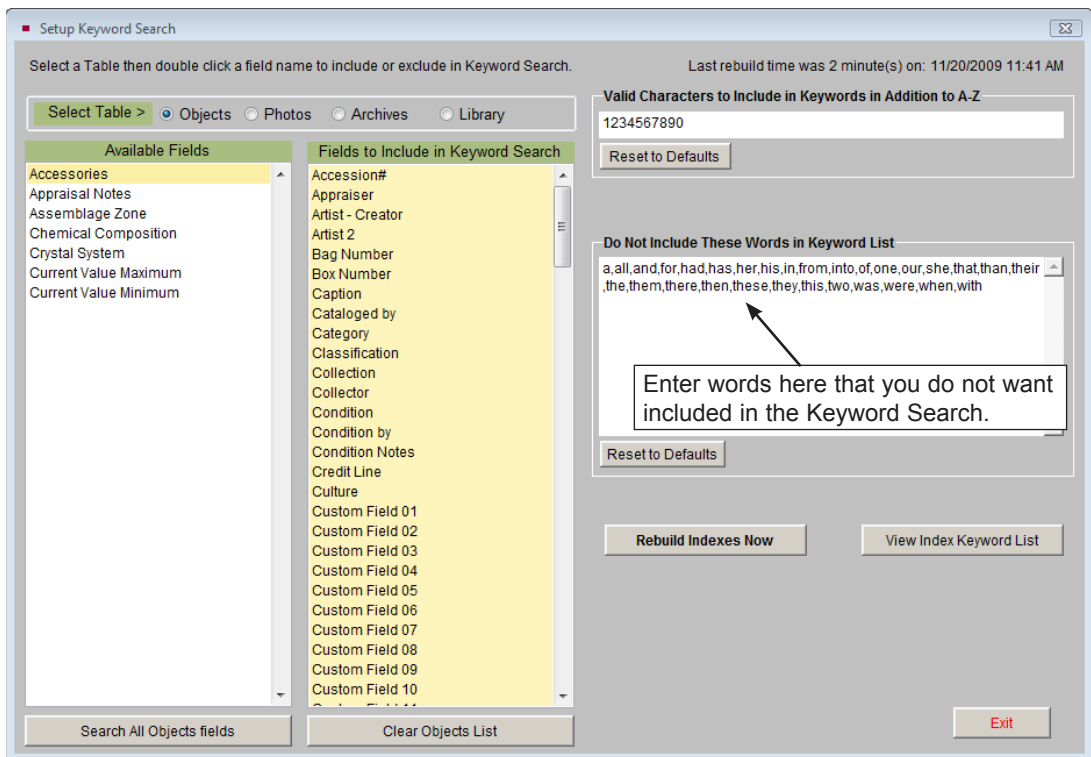


Figure 14-12 Setup Keyword Search screen

## STARTING A KEYWORD SEARCH

To start a new search, click **By Keyword** in the Research section of the Main Menu and type up to five words in the box on the upper left-hand side of the Keyword Search screen. To select a word from the word list, click on the **Select from Word List** button. The word list will appear, and you can double click on

a word to select it. If you are not sure the word you have selected is the correct word, you may click the **Sounds Like** button to view a list of words similar to the word you have selected.

If you enter more than one word, you will also need to select your **Type of Search** at the top of the screen. If you choose **Any Word**, PastPerfect will look for records where any of the words appear. Not all the words will need to appear on the record for it to be selected. If you choose **All Words**, PastPerfect will look for records that contain all of the words. If a record does not contain all the words, then it will not be displayed in the query results. If you are looking for a specific phrase, you want to use the All Words option.

If you need to use a wildcard character, you may use an asterisk (*) at the end of the word. Putting the asterisk at the end of the word, such as "camp*" will search for any word that begins with "camp." These words may have various endings, such as "camping" or "camps."

You may choose to search all catalogs, or select the catalog(s) you wish to search by clicking the check box next to the catalog at the top right of the screen. See the Search section in Figure 14-11.

For your initial search, you must choose **All Records** to search through all records in the selected catalogs. After you perform your search, you may run another search on just the resulting records by selecting **Results Only**. Next click the **Start Search Now** button. The search will begin running and the results will appear in a grid on the bottom of the screen.

When the search is complete, the number of records searched and found will display just above the Search Results grid. The options described earlier in this chapter are now available: Save Results to List, View Records, View Images, Print Results, Export to Excel, Include on Web, Query History, Delete Marked Records, and Clear Results.

# RESEARCH BY LEXICON

Click on the **By Lexicon** button in the Research section of the Main Menu to search for items with a specific object name. The Lexicon search has access to all four catalogs: Objects, Photos, Archives, and Library. You may narrow your search by unchecking the boxes next to the catalogs you do not want included. The Lexicon can be searched two ways – either using the Hierarchical Listing of Terms or the Alphabetic Listing of Terms. Make your selection by clicking the radio button at the bottom of the Search by Lexicon screen.

## HIERARCHICAL LISTING OF TERMS

The Hierarchical Listing of Terms is designed to help you find the object name within the context of a Category, Classification or Sub-Classification. This search can be helpful if you have an idea of the type of item you are trying to find, but you do not know the specific object name.
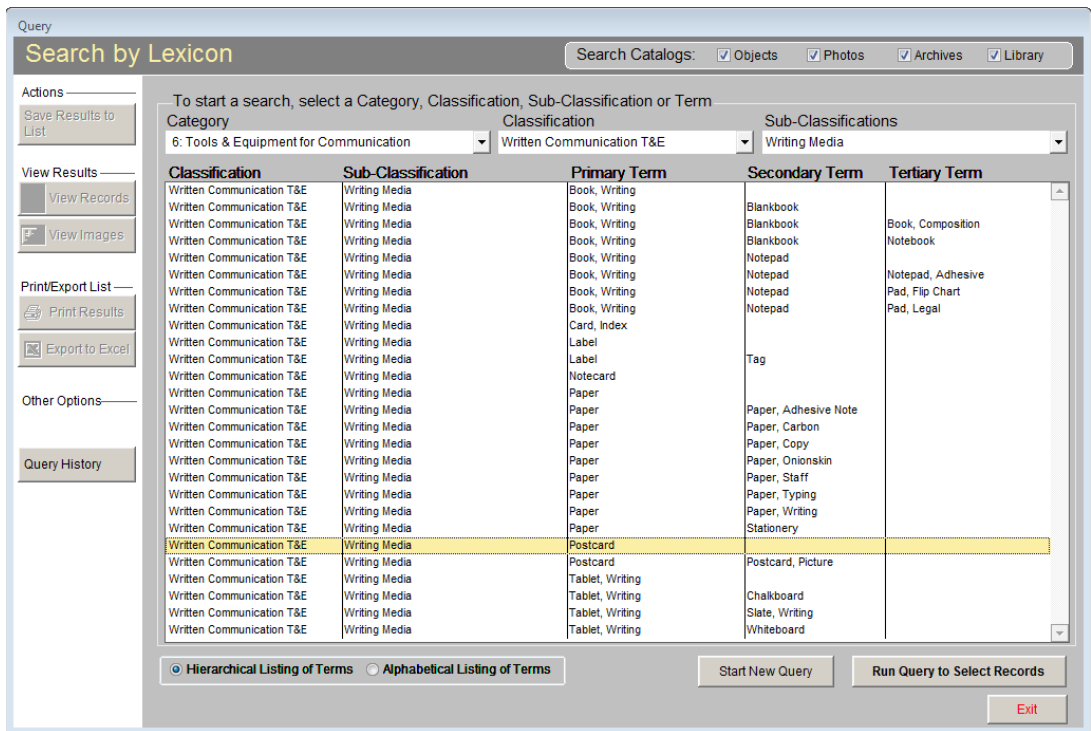


Figure 14-13 Hierarchical Listing of Terms Search

For example, if you want to search for items that were used for sending correspondence by mail, select the Lexicon Category of "6: Tools & Equipment for Communication" by clicking on the down arrow next to the **Category** field and selecting that category. The list below will display all items in that Category. You may then select the **Classification** of "Written Communication T & E" and the **Sub-Classification** of "Writing Media." The list of terms will display only those items within the selected Classification and Sub-Classification. You will see terms listed at the Primary, Secondary and Tertiary levels. For this example, click on "Postcard" in the Primary Term level to search for all postcards in the collection, as in Figure 14-13. Then click **Run Query to Select Records** at the bottom of the screen. The search will begin running and the results will appear in a grid on a new screen, seen in Figure 14-15.

## ALPHABETICAL LISTING OF TERMS

If you know the object name you want, using the Alphabetical Listing of Terms may be easier for you, as you may select the object name from a list without choosing a Category and Classification.
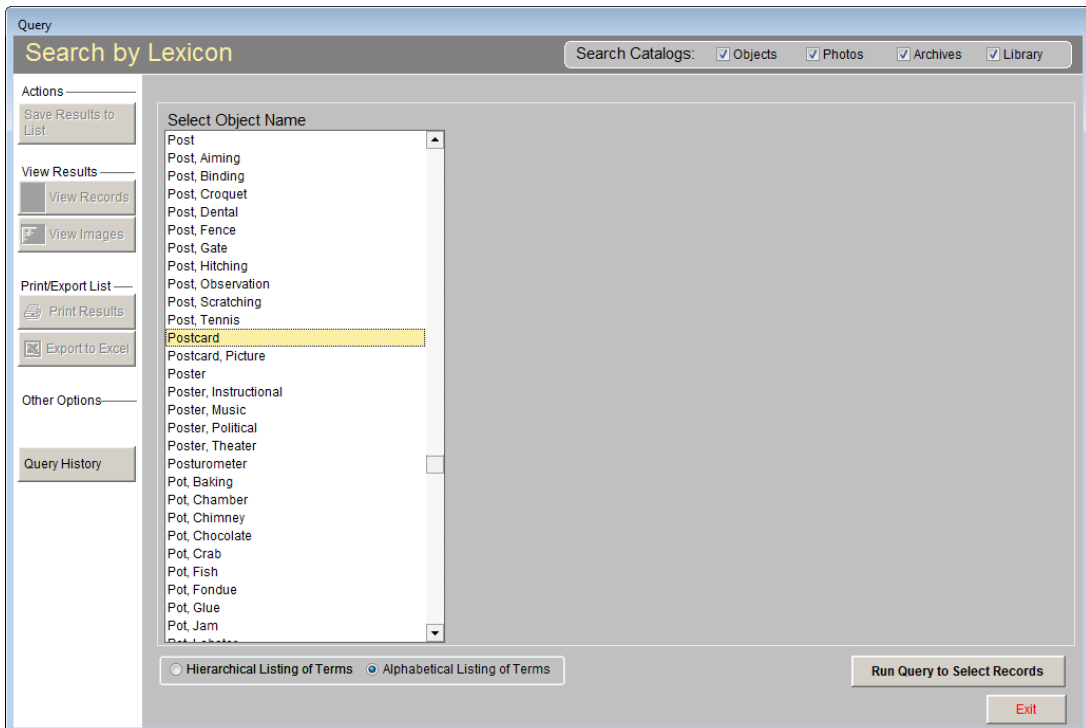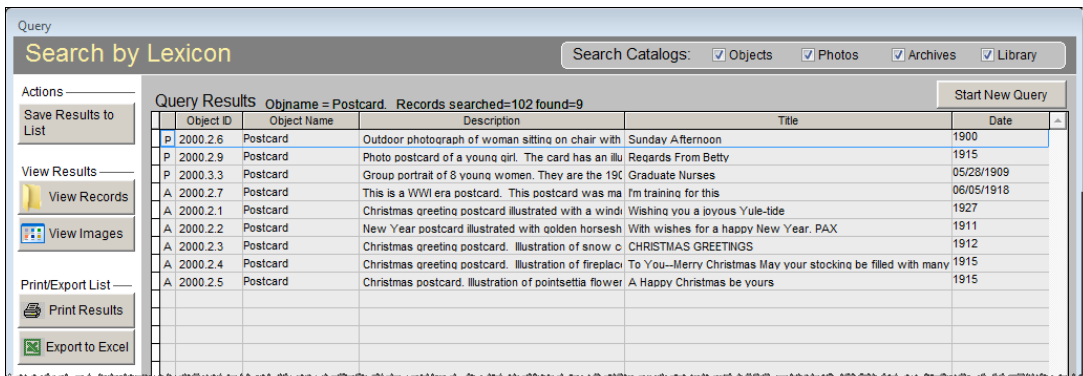


Figure 14-14 Alphabetical Listing of Terms Search

Click the radio button next to **Alphabetical Listing of Terms** to view the list of all object names in alphabetical order. For ease in navigating the list, click once on any term, then quickly type the first couple of letters of the term for which you are searching. For example, if you know you want to find the postcards in the collection, start typing the letters "POS" quickly. Highlight the term Postcard, as in Figure 14-14, then click **Run Query to Select Records**. The search will run and the results will appear in a grid on a new screen, seen in Figure 14-15.

TIP ——— Please note that object terms appear in inverted word order. If you are searching for the object name "legal pad," it is listed as "pad, legal." You would type "PAD," rather than find it under "legal."



Figure 14-15 Lexicon Search Results for Postcard

When matching records are located, you have all of the options described earlier in the chapter for saving the results to a list, as well as viewing and printing records.

# RESEARCH BY PEOPLE

The People field appears in all four catalogs and is used to identify people who appear in photographs or are associated with archival materials, objects or library books. When entering peoples' names in the catalog records, they should be entered in the format Last name, First name. Separate each name with a carriage return. When the record is saved, PastPerfect will automatically add the names to the People authority file.

The Research **By People** screen will display the People authority file. This authority file appears as a rolodex with columns for names and numbers of times the name appears in each of the four catalogs.



Figure 14-16 Search by People

To view the catalog records associated with any of the names on the list, double click on the name.
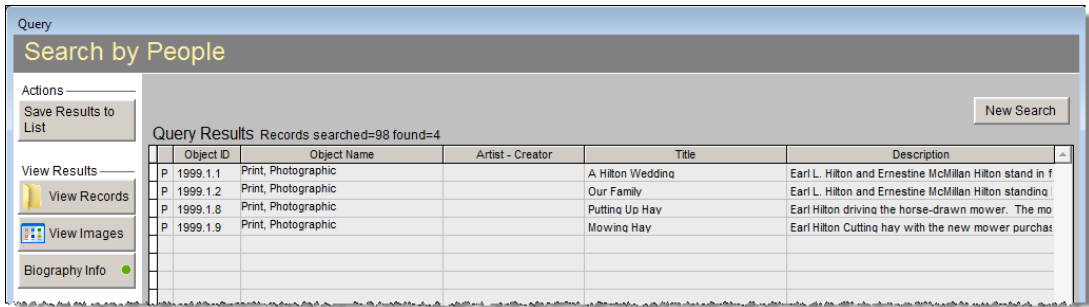
Figure 14-17 Search by People Results

When the search is complete, all of the viewing, printing, and exporting options are available. An additional button titled **Biography Info** is included in the View Results section of the Sidebar. If biography information has been entered in People Biographies for the name searched, a green data light will appear on this button. For more information on the People Biographies screen, please see *Chapter 16 - People & Sites.*
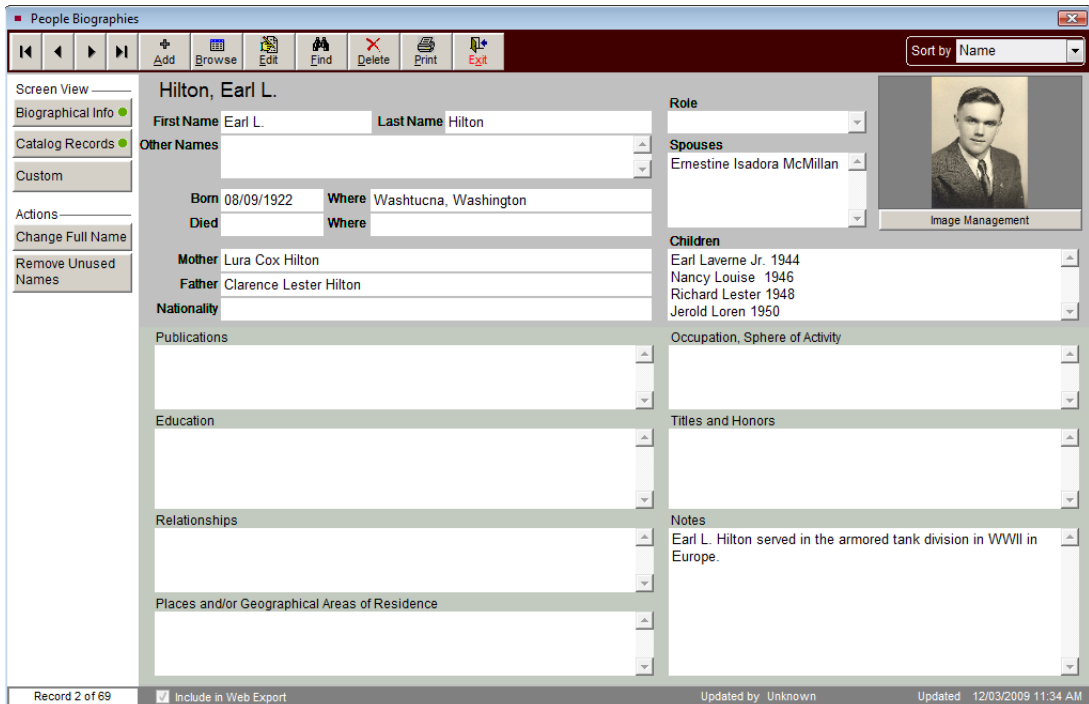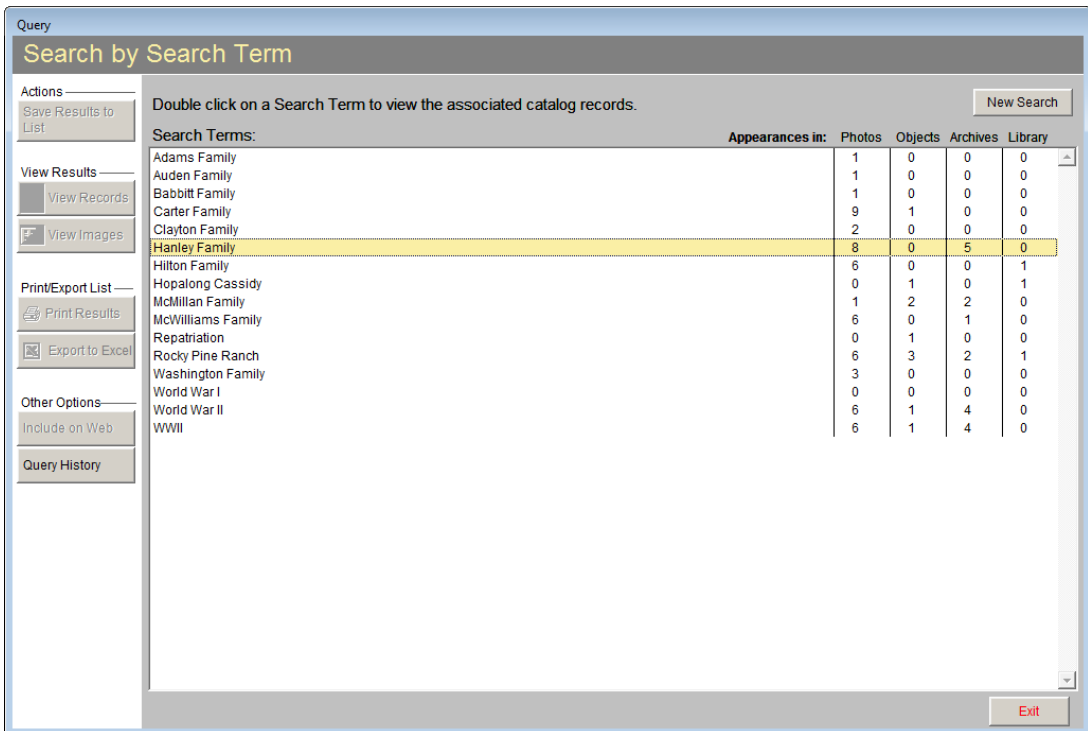


Figure 14-18 People Biographies

**People Biographies** may also be accessed from the **People & Sites** section on the Main Menu. Instead of using Research | By People, you can use People Biographies to perform searches. By clicking the **Find** button in the top Navigation Bar, you can locate People by the following fields: full name, last name, first name, other name, birth date, birth place, death date, death place, father and mother.

# RESEARCH BY SEARCH TERMS

The Research **By Search Term** method is designed to provide an access point into your catalog records that is based on terms created by and for your particular institution. For example, if your institution is a local historical society, your search terms may be family names or local places of importance. PastPerfect automatically creates the Search Terms authority file based on the entries in the catalogs' Search Terms field. By clicking **By Search Term** in Research, the Search Terms authority file will be displayed on the screen.



Figure 14-19 Search by Search Term

The search terms are listed on the left half of the screen and the numbers of appearances in each catalog are listed on the right. To begin a search, double click on an entry on the list.

The search results will display on the screen as shown in Figure 14-20.



Figure 14-20 Search by Search Term Results

When your search results appear, all of the options for saving as a list, viewing, printing, and exporting are activated as seen in Figure 14-20.

# QUERY IN INDIVIDUAL CATALOGS

You can also search each catalog (Objects, Photos, Archives, Library, and Contacts) independently. These searches can be done within the catalog screen by pressing the **Query** button in the Navigation Bar. These single catalog queries are identical to the All Catalog queries described above, except that all fields within that catalog are available for searching, not just the fields common to the four catalogs.

The first step is to use the **Field** and **Condition** drop-down menus and enter a **Value**. Click **Add to Statement** to begin creating the filter statement to select records. Add additional filters to the statement as required, and click **Run Query**

**to Select Records**. The Query Results will appear in a grid on the bottom half of the screen. You then have all the options for saving, viewing, printing and exporting the results.

TIP   You may choose the fields that are available in the Field drop-down menu and in the Query Results by going to the Main Menu | Setup | Query Fields section.

# QUICK FIND

The **Quick Find** button allows you to search for a particular Object ID or Contact ID number right from the Main Menu. This feature is especially helpful if you know the Object ID number of the item you want to find, but you are not sure in which catalog the item is located. The Quick Find will search through the Objects, Photos, Archives, Library and Contacts catalogs.

To begin your search, click the **Quick Find** button on the Main Menu. Enter the Object ID or Contact ID number you are looking for in the blank line. Or, if you have a barcode label printed with the Barcode Printing or Inventory Manager Upgrades, scan the barcode with a barcode scanner. Check the box or boxes for the catalogs you want PastPerfect to look in for the number. Then click **Find**.

Figure 14-21
Quick Find
screen



When the record is found, the catalog containing that record will be opened and the item's record will appear on the screen. You can begin working with that record and continue to work in that catalog, the same as if you had opened the catalog directly from the Main Menu.