

Thanks for purchasing the Inventory Manager Upgrade for PastPerfect 5.0! Please note, you must be running PastPerfect 5.0B3 or higher to use this upgrade. Once your upgrade is installed, this guide will help you test your barcode scanner, use the new Quick Find feature in PastPerfect, create and print inventory lists that are generated by your PastPerfect program, and import lists of items from a variety of devices.

Installing the Upgrade:

1. Have all network users close PastPerfect, then open PastPerfect on a computer with a CD drive.
2. Click "Setup," then click "System Parameters."
3. Click "Unlock Upgrade Options" and follow the prompts.
4. When the process is complete, close PastPerfect.

Set Up and Test Your Barcode Scanner:

Many different types of barcode reading devices will work with PastPerfect. Since these devices can vary, only the critical steps are listed here. When a barcode is scanned, the device must send just the barcode information that is read, followed by a single <enter> function (or carriage return.) Follow these steps to test the setup of your scanner.

1. Connect your barcode scanner to your computer or other device.
2. Open Notepad or any simple text editor.
3. Scan the first barcode below, then the second.
4. Figure 1 displays the desired result, two strings of characters with a single line separating them.

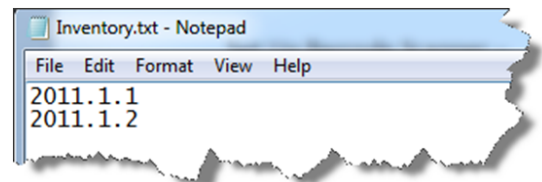


Figure 1: Barcode Scanning to Notepad

Please Note: If you receive a different result than the one seen in Figure 1, additional configuration of the barcode reader is required. Please consult your barcode scanner user guide or contact the equipment supplier for assistance.



Using Quick Find:

Quick Find

Figure 2: Quick Find button on Main Menu

Quick Find is a new PastPerfect button on the Main Menu that allows users to type in an Object ID number or Contact ID number, press enter, and jump directly to that record in PastPerfect. You can use your barcode reader to make this process even simpler! Just click "Quick Find" on the Main Menu, then scan the barcode. If the barcode number that is read by the scanner is not present in PastPerfect, you'll receive a message stating the ID number cannot be found. You can even select which catalogs you want to use with this feature.



Figure 3: Quick Find Screen

Create a List of Items to be Inventoried:

PastPerfect's Inventory Manager allows you to create lists of items for inventory based on a number of factors. You can choose to create lists of all items based on these criteria, or a random sampling of items based on the same criteria. Once the list is created, you can use your Catalog List tools to modify the list and print Inventory Worksheets.

1. From the Main Menu, click on "Inventory Manager."
2. Click on "Create Inventory List" to see Figure 4.
3. Specify the parameters for your inventory.
4. Click "Create List Now" to build the catalog list based on your choices. When the process finishes, you will have a screen informing you of the number of records on your list.
5. When you click "OK," you will automatically be taken to Catalog Lists to see your newly created list. (Figure 5.)

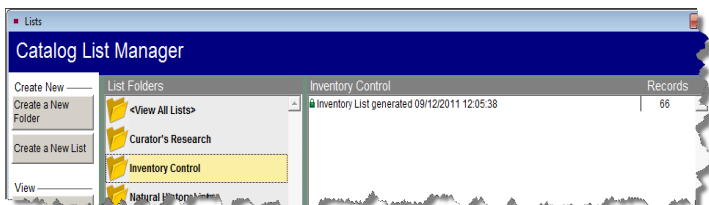


Figure 5: Catalog List Manager, Inventory Control lists

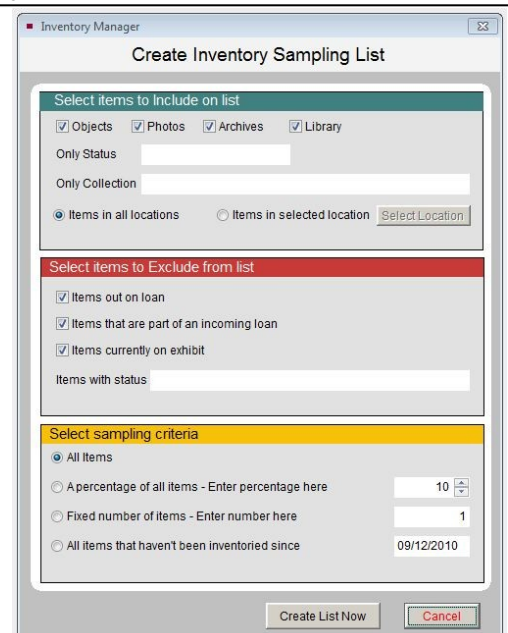


Figure 4: Inventory Manager, Create Sampling List

Printing Inventory Worksheets:

When in Catalog List Manager, after clicking “View Selected List,” you can “Print Inventory Worksheets.” The most basic worksheet is listed as the Inventory Check List and displays about 32 records per page. These reports can be modified to meet your needs. For additional information, review chapter 17 of the PastPerfect User’s Guide.

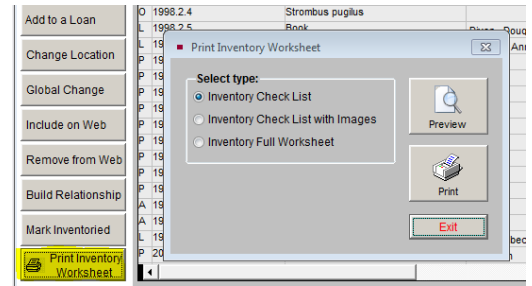


Figure 6: Print Inventory Worksheet screen

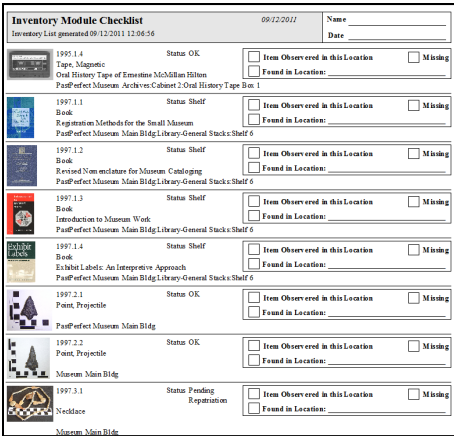


Figure 7: Inventory Check List with Images report

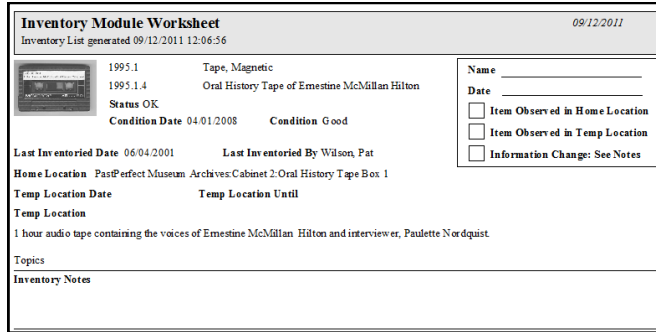


Figure 8: Inventory Full Worksheet

Importing a Group of Items to a Catalog List:

With a simple text document formatted like Figure 9, you can place catalog records on a list based on their Object ID number.

1. From the Main Menu, click on “Inventory Manager.”
2. Click on “Import List,” then “Import List Now.”
3. Browse to the location of your text file, select it, then click “OK.”
4. The list will be saved to the “Inventory Control” section of your Catalog Lists, where you can use the standard list tools to print reports or make mass updates to the records.

Please Note: If an Object ID number in your text file is not found in PastPerfect, that number will appear in a text file that you can save and print.

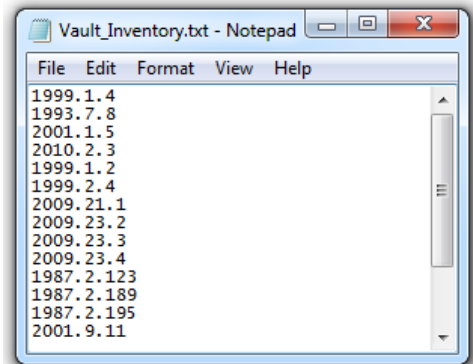


Figure 9: Notepad list of Object ID Numbers

Importing from Other Digital Devices:

The principles for importing are the same whether the list is compiled by typing manually into a Notepad document or scanning items into your Android tablet. You have to have a simple text file with one item per line separated by <enter> or a carriage return. When using a device that is incapable of creating a simple text file, try emailing yourself the list and pasting the contents of that email into a text file. Then follow the instructions above.

Mass Update of Items on Inventory Lists:

From the Catalog Lists screen, you can perform global changes to the catalog records on your list using the “Change Location,” “Global Change” and “Mark Inventoried” buttons. **WARNING: Global Changes can not be reversed and can have unintended consequences. Be certain to make a backup before making any global change.**

Change Location: This feature is useful when dealing with a list of items that is being relocated during a collections move.

1. Import or create a list of items that you want to move.
2. Make a PastPerfect Backup.
3. Select your list under “Catalog Lists” and click “Change Location.”
4. Place checkmarks next to the fields you want to affect, then type in the new values that you want all of the records to have. Only checked fields will be modified!
5. Click the “Change Location” button.

Mark Inventoried: This feature will not change an item’s location, but will allow you to place existing inventory information into the inventory history table and update the Inventory Date and Inventoried By fields.

Global Change: This feature allows you to update many of the common fields across all four catalogs. Be very careful when making global changes as they are not reversible.

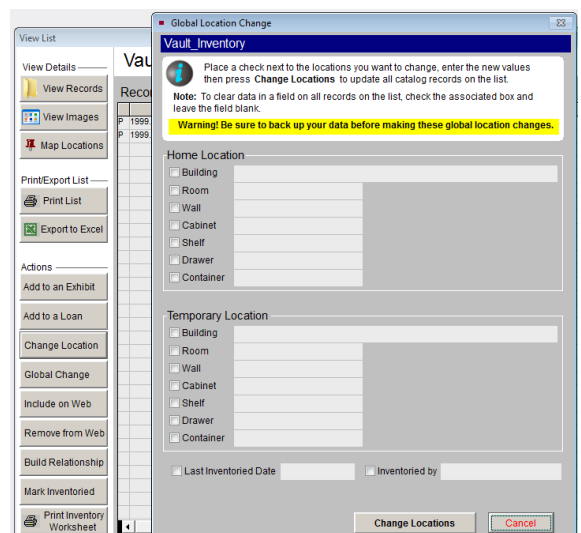


Figure 10: Global Location Change screen.