

How do I import data from Excel into PastPerfect?

Version 4:

Please note that importing data from Excel is not a simple process. You will most likely need to do cleanup of your Excel file to make the data useable in PastPerfect before you import it.

PastPerfect Software offers Import Assistance, where we can import your data for you for a small fee. Please consider having us assist you if you feel this is a larger project than you want to attempt.

Instructions for data cleanup before importing:

1. Be sure you are not repeating individual or contact id #'s or object id#'s. If you are importing into Contacts, you will need to have a column on your spreadsheet for id #'s for the import to work, since this is the field that is unique to each record.
2. You must have Object ID numbers if you are importing into one of the catalog records, - Objects, Photos, Archives, or Library. You must have an Accession number if you are importing into Accessions.
3. You must have an Object Name for each item if you are importing into one of the catalog records – Objects, Photos, Archives, or Library. If you are not sure what to name the item, use "Unknown."
4. You can import into only one database at a time - Objects or Photos, etc. You may need to modify your data file so it is broken up into smaller files that contain records for just one database.
5. Remove any columns on your Excel file that you are not importing. Blank columns will result in data going into the wrong fields.

Special Notes for importing into Contacts:

1. You cannot import membership information, donation payments, dues payments, in-kind gift payments, or pledges. This data is stored in separate tables, not in the Contacts data table itself. If you would like to import this information, please contact PastPerfect Software for Import Assistance.
2. Make sure you are filling in all the fields you can in PastPerfect. You may need to add more fields to your Excel file and fill them in with the appropriate data from other fields. For example, you should import data into the "Name & Title" field - this is the field that gets printed on labels and mailings. It should be formatted the way you want it on a mailing, such as "Mr. and Mrs. John Smith" or "Ms. Nancy Green". You should also import data into at least one of the Dear fields (Dear formal or Dear casual) since this gets printed on letters. Dear formal should be formatted as "Mr. and Mrs. Smith" and Dear casual should be "John and Jill". Excel has a function called "Concatenate" that can be helpful with filling in information like this if you already have separate columns in

your Excel file with the starting information. Refer to the Help section in Excel for instructions on how to use this function.

3. Phone numbers must be formatted as 123/456-7890. If you do not have an area code, you will need 3 spaces and a dash to hold the spots, such as " /123-4567" If you have parentheses around the area code, such as (123)456-7890, you must remove them.

4. If you are importing into Contacts, you will need to have a column on your spreadsheet for id #'s for the import to work, since this is the field that is unique to each record. You can leave this column blank, and PastPerfect will assign the numbers after you import and reindex. If you do have Id #'s, be sure you are not repeating contact id #'s.

General Notes:

1. Make sure your Excel file is saved as a worksheet and not a workbook. You may need to save it as an Excel version 4 worksheet, that is ok. You can do this by going to Save As at the top of your Excel file, and make sure the File Type is a worksheet.

Please Note: if you are using Office 2007, you may not have the option to save your Excel file as an Excel version 4 worksheet. To import your data, you will need to save your data as an Excel version 5 workbook and delete all the sheets in the workbook except for the one you are importing. To delete the extra sheets, right-click on the "Sheet 2" at the bottom left corner of your Excel file and click Delete. Do the same for "Sheet 3" so you only have the one sheet containing your data. Then save this file.

2. When typing in the fields you are importing into, make sure you have the exact field names listed in the order they appear on your Excel file. The field names can be found by clicking the Reports button on the main menu of PastPerfect, clicking on the Field Descriptions button, then double clicking on Field Descriptions for the database you are working with and clicking Preview. The field name you want to type in is in the brackets at the end of the description. For example - the Accession Number says [accessno:c(15)], so the field name is "accessno". The rest of the information means it's a character field (c) and it has 15 characters. You will need to list the field names on the Import screen separated by commas, no spaces, and no carriage returns.

3. Make sure the name of the data file does not have any spaces. It should not be longer than 10 characters or so. Also, the make sure the name of the path to the data file is not long (ex - c:\My Documents\Historical Society\new files\library files to be imported.xls would be too long and contains spaces).

4. Once you import data, you do not want to import that same data again. PastPerfect will not merge records when importing the same records - it will just create duplicate records. If you need to start over, restore the backup you made before importing, and you will be back to where you were before importing.

5. You may also want to take a look at the section on Import and Export in the Utilities chapter of the User's Guide for more visual aids.

Here are the basic steps for Importing into PastPerfect from Excel.

1. Make a backup of your data to your hard drive by clicking the Backup button on the Main Menu and clicking Backup data to Hard Drive. After this is complete, also back up your data to either a CD, DVD, or removable drive. If you are not able to backup, please do not proceed with the Import. Instead, call our support office for assistance.
2. Go to the Utilities button on the Main Menu and click on the Import button.
3. On the Import screen, choose the type of file you are importing from (the Source) such as Excel 5.
4. Put in the location of your import file.
5. Choose the database you are importing into, such as Objects.
6. Choose to import Selected Fields, and then type in your list of field names for the fields you are importing into.
7. Click the Prepare Input button to begin the process
8. On the Pre-Import screen, select either "New Records", "Duplicate Records" (not recommended!) or "Blank Object ID" (only recommended if you have blank Contact ID numbers). You can Browse the records to make sure the data is displaying in the correct fields.
9. When you are satisfied with the data to import, click Import Data Now. You will be notified with the number of records that were imported.
10. Exit from the Import screen and click Reindex on the main menu. Click Start Reindex Now to begin the Reindex. Once this is finished, exit from the Reindex screen and check your records that you imported.

If you have any questions, please contact our Support Office at (800)562-6080. Thank you for using PastPerfect!