

Welcome to PastPerfect Video Tech Tips. This technical tip will include an overview of when and how to use Fill with Blank Data, Current Data and Default Data when adding new records.

When adding records into PastPerfect, there are options that can make the task of data entry easier and more efficient. It begins with the fill options, on the Add screen. These options include Fill with Blank Data and Fill with Current Data, which are available in each catalog, and Fill with Default Data, which is only available in the Objects, Photos, Archives, Library, and Contacts catalogs.

### **Your first option when adding a record is: “Fill with Blank Data”**

“Fill with Blank Data” is the standard setting; it is available from all catalogs. This option creates a new record in which all fields, except catalog date and those populated from the Add screen, are empty. This is the most common choice when creating a new record, because it allows you to fill in unique information for every field within that screen.

### **Your second option when adding a record is: “Fill with Current Data”**

In the Objects, Photos, Archives, Library and Contacts catalogs, “Fill with Current Data” is selected with a radio button, which, once selected, will populate the fields on the Add Screen from the current record. In the Accession, Temporary Custody, and Incoming Loan catalogs “Fill with Current Data” is indicated with a check box, while in Outgoing Loans, this option is also a check box but is labeled: “Fill from Last.”

“Fill with Current Data” allows PastPerfect to copy all information from the record from which you pressed “Add.” Your new record will have the same data as the record you are currently viewing, with the exception of the Object ID number, which must be a unique number for each record.

“Fill with Current Data” is of use if you are cataloging a series of items that are very similar. For example, a set of dining room chairs or a collection of flatware that has the same provenience, pattern, source and so on.

### **Your third option when adding records is: “Fill with Default Data”**

“Fill with Default Data” is accessible from the Objects, Photos, Archives, Library, and Contact catalogs.

We will demonstrate “Fill with Default Data,” by entering the Objects catalog and then selecting the Add button on the upper left portion of the screen. When viewing the Add screen, the “Change Default Data” button will always be directly below the choice “Fill with Default Data.”

“Fill with Default Data” allows PastPerfect to create a new catalog record based on the information entered in the “Default Data” screen.

- To add information to this screen, please select the button “Change Default Data.”

“Fill with Default Data” is of use when there are fields that will contain the same information each time a new record is added. This allows for ease of entry and the standardization of

repetitious information. For example, you may wish to setup information on the Default Data screen for a field like Cataloged By. You may either type the desired text directly into the field or, if applicable, you may use an Authority File to populate the field.

Please note: If you are using an Authority File to populate a field within the Default Data Screen, it works exactly as it does when in Edit mode. You would either right click within the field, or select the field and press F7 on your keyboard.

- When in the Authority File, you may either double click to select an item, or you may highlight the item and then press Enter on your keyboard.

You may also insert information in sub-screen fields, accessed through buttons on the Default Data catalog screen. For instance, within Appraisal, you may wish to insert the information for the Insurance Company, Insurance Representative, and the Insurance Phone Number.

- When finished entering information in a sub-screen, you may select Close to return to the main Default Data screen.

If Security is enabled for PastPerfect, each user has the ability to create a Default Data screen that will appear just for them, if they have access to the Add button.

It is also important to note that you may change the information on the Default Data screen at any time. So, in addition to setting up the Default Data screen with information that might be entered for every catalog record, this utility will allow you to fill in data for certain fields that will only be of use for a series of records. For example, if you received a large accession of furniture from the local furniture maker, on the default data screen you may fill in fields like Accession number, Artist, Maker's Mark, and Place of Origin.

- Once you have filled in the desired fields on the Default Data screen, in the upper left corner, please press Save.

The information inserted on the Default Data screen is available for future or immediate use.

- If you do not wish to add any catalog records now, you may choose to exit from the Add screen by selecting Cancel; the information just added to the Default Data screen will remain available for future use until manually changed.
- Or, you may continue your data entry using the default data by selecting the radio button for "Fill with Default Data" and inserting the Accession or Loan number, if applicable, then either completing the Object ID number, if "Prefill Objectid" is checked or by inserting the entire Object ID number, if unchecked. Then insert the Object name, by typing it manually, using your Authority File, or by using the Search Lexicon feature, if the term was not entered as a part of your Default Data and press the Add button.

You will notice that the information that you entered on the Default Data screen is now in your record.

- Once you have completed the data entry for this record, in the upper left corner, please press "Save."
- To return to the Main Menu, in the upper central portion of the screen, please press Exit.

If you have any questions regarding these add options, please contact our support office at 1-800-562-6080, toll free or email us at [support@museumsoftware.com](mailto:support@museumsoftware.com).