Research is where all the hard work of cataloging pays off. Research allows you to develop insights and draw conclusions about your collections. The computer 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.

Research has five methods of searching, which are commands on the main menu Research fly-up menu. They include searching All Catalogs, by Keyword, by Lexicon, by People, and by Search Term. The sixth research method is to use the Query command which appears at the top of each of the four catalog screens.

Once a catalog record or group of records is located via a search, you can view the Catalog screens for each object, or print a summary or detailed list of the selected objects.
RESEARCH ALL CATALOGS

This search allows you to search all four catalogs at once. The Objects, Archives, Photo, and Library catalogs contain fields that are common to all. These fields are available through the All Catalogs search.

To begin a search, press Research on the main menu and then the All Catalogs command button on the fly-up menu. The following screen will appear:

Searches can be performed on any field that is common to all four catalogs. There are seven pull-down field lists enabling you to search multiple fields at once using the “and” or “or” operator to either narrow or expand the search.

Figure 14-2
Research All Catalogs

Figure 14-3
All Catalogs

Seven pull-down field lists are available
Each of the seven pull-down field lists is arranged alphabetically. Click on the field of your choice.

Next select a condition statement in the box to the right. Condition statements include: Contains text, Contains exact match, Begins with, Equals, Greater than, Greater than or equal to, Less than, Less than or equal to, Is empty, Is not empty, Is within list, and Does not contain text.

Then in the next box to the right labeled “What” enter the word or words you want to find; capitalization is not important unless you check the Match Case box at the top right of the screen.

To start the search, click on the **Search Now** command button.
In the example shown we searched the common field Collection for records that contain text “Rocky Pine Ranch.” The results were eight photographs, four objects, and two archival records.

If matching records are located, a list is displayed as in Figure 14-2 and a number of options are then available as described below.

**View Selected Catalog Records** - Use this command button to view the catalog screens for each record located. All functions are available, including displaying source information and images.

**Preview List** - View the report for the search results before you print it. Check the “with Image” box if you want associated images to display on the list. Note that imaging is an optional feature.

**Print List** - Prints a list of all records that were located in the search.

**Print Detail, Catalog Cards/Labels** - Prints the full catalog record of each record located, one record per page. It also allows you to print catalog cards, catalog record labels, exhibit labels, and barcode labels.
**Remove Marked Records** - Before you view or print the resulting records list, you can manually remove selected records from the results by clicking in the box to the left of the record to mark it. Then press **Remove marked records**.

**Save Query** - This command allows you to save queries for future use. The condition statements are saved and not the actual results. You will be asked to give the query a name by which it will appear on the list of all catalog queries.

**Retrieve Query** - Use this command to select from a list of previously saved queries. Once a query has been retrieved you may run it as is or modify it and then run it.

**Clear Results** - Clears the search result list so you can start a new search.

**New Search** - Clears the search results list and any entries in the “What” fields.

---

**RESEARCH BY KEYWORD**

To access this search method, click on the **by Keyword** command on the Research fly-up menu to reveal the screen in Figure 14-8.

The Keyword search is an indexed search, meaning PastPerfect creates a word list from the entries in the Archives, Library, Objects, and Photo 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 yellow box at the top right of the screen. Please note, rebuilding may take several minutes, for this reason, the rebuild can also be included as part of the Reindex process.
KEYWORD SEARCH MANAGEMENT

To increase the speed of searches and the time it takes to rebuild the index, you can choose to include only words that are in selected catalog fields. You can also create a list of common words like “and” and “the” that will be ignored. To make these changes, open the Setup fly-up menu on the main menu and select **Keyword Search** to open Keyword Search Management screen show in Figure 14-9.

The left side of the screen has four tabs that list the possible search fields in the Photos, Objects, Archives, and Library catalogs. Place a check mark next to the fields that you want to include in the search. The fewer fields you include, the faster the rebuild process and the faster the searches.

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

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.

Figure 14-9 Keyword Search Management

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

**STARTING A KEYWORD SEARCH**

To start a new search, 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** command button. The word list will appear.

Next click the **Start Search Now** command button. The search will begin running and the results will appear on the bottom of the screen.

When the search is complete, the number of records searched and found will display. The commands described earlier in this chapter are now available: **View Selected Catalog Records, Preview List, Print List, Print Detail, Catalog Cards/Labels, Remove Marked Records, and Clear Results.**
FIND BY LEXICON

Click on the by Lexicon command button on the Research fly-up menu to search by lexicon category or term.

A Lexicon search is designed to allow you to search for catalog records by main category or sub-category. Select the Lexicon category by clicking on the down arrow next to the category field. You may then select the sub-category or object name you want to search for. You may want to first select a main category or sub-category to narrow the selection list. To start the search, click on the Search Now command button. The Lexicon search has access to all four catalogs: Archives, Objects, Photos, and Library.

For example, you can search for all catalog items in the main category Communication Artifacts, or you can further narrow the search by choosing the sub-category, Documentary Artifact.

PastPerfect will search for all items in your catalogs that match the criteria category Communication Artifacts, sub-category Documentary Artifact.

Further narrow the search by choosing an object name. In this example, Postcard is the object name. PastPerfect will search all catalogs to locate any items with the
main category Communication Artifacts, sub-category Documentary Artifact, and the object name Postcard. The results appear on the list.

A Lexicon search can be as general or as specific as you like. If matching records are located, a list is displayed and the command buttons Preview List, Print List, View Catalog Records, and Print Detail, Catalog Cards/Labels are enabled.

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 last name, first name. If each name is separated with a carriage return, then PastPerfect will add the names to the People authority file.
The Research by People screen will display the People authority file. With each appearance of a name, the columns to the right will indicate the number of times the name appears in each of the four catalogs.

To view the catalog records associated with any of the names on the list, double-click on the name.

When the search is complete, the four command buttons at the bottom of the screen are enabled.

The command button **Preview List** allows you to view the summary report for the search results before you print it. The following is an example of how Preview List looks.
The **Print List** command button prints the above report.

**View Catalog Screens** takes you to the catalogs, giving you a mini-database containing only the records that resulted from your search.

The **Print Details, Catalog Cards, or Labels** command reveals the following screen:
Research by People allows you to enter or display biographical information. To display or print biographical information from the Research by People screen, first select a name from the People list, then click on the Biography command to display, enter, or print genealogical and biographical data. When there is information entered in the Biography screen, the command button will be green. If no information is in the Biography screen, the Biography command button will be grey.
RESEARCH BY SEARCH TERMS

The Research by Search Terms 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 catalog’s Search Terms field.

The Search Terms authority file will be displayed on the screen.

Figure 14-19
Research by Search Term

The search terms are listed on the left half of the screen and the number of appearances in each catalog is 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.
When your search results appear, the **Preview List, Print List, View Catalog Screens**, and **Print Details-Catalog Cards or Labels** command buttons are activated.

**INDIVIDUAL CATALOG SEARCHES**

You can also search each catalog separately. These searches can be done within the catalog screen by pressing the **Query** command. These single catalog queries are identical to the All Catalog queries described above except that all fields are available for searching, not just the fields common to the four catalogs.