

1

INSTALLATION AND UPGRADE

This chapter will explain how to install PastPerfect on a single computer or a network. It will also show you how to load data from an older version of PastPerfect. At the end of the chapter you will find a list of the new features in version 5.0.

INSTALLATION ON ONE COMPUTER

1. Close all programs on the computer.
2. Insert the PastPerfect CD into the computer's CD or DVD drive.
3. The installation program will start automatically.
4. Follow the instructions on the screen.
5. On the **Installation Folder** screen, leave the default path c:\pp5 if possible.
6. On the **Select Packages** screen, choose the **Single Computer or Server** option.
7. Continue with the on screen instructions to complete the installation.

If the installation does not start automatically on your Vista or Windows 7 computer, click Start | Computer and locate the CD or DVD drive. You should see the drive in the Devices with Removable Storage section, and its label should read "PastPerfect 5.0." Right click on the CD/DVD drive and choose **Install or run program** from the menu. When using Windows XP, click Start | My Computer and double click on the CD/DVD drive. Once the program is installed, remove the CD and store it in a safe place.

The installation will create this icon  on the Windows desktop that you can use to start the PastPerfect program.

TIP

PastPerfect cannot be installed into a folder with a space in the name. By default, it is installed into `c:\pp5`. While you can certainly specify a different drive, such as `d:\pp5`, we recommend that you not change the folder. For example, `c:\Program Files\pp5` will not work because of the space between "Program" and "Files."

INSTALLATION ON A NETWORK

PastPerfect is designed to run on peer-to-peer and client/server networks. For PastPerfect to operate as a network program, you will need a network operating system on a Windows XP, Vista, Windows 7, Windows Server 2003 or Windows Server 2008 computer. You will also need to purchase a network upgrade for PastPerfect.

To optimize performance, the PastPerfect program is installed on each workstation with shared access to common data files residing on the network file server. For small networks with two or three computers, a peer-to-peer network will be acceptable. A peer-to-peer network is simply a group of computers connected to share resources. Windows XP, Vista and Windows 7 come with network capabilities, which enable the file sharing.

For larger networks, a client/server based network offers greater reliability and security. A server is a dedicated computer, usually more powerful than a typical desktop computer, running server software such as Windows Server 2003 or Windows Server 2008.

To install PastPerfect on a Windows network, you will need the following:

- Two or more computers running XP, Vista, Windows 7, or for client/server networks, Windows 2003 or 2008 Server
- One computer to act as the peer-to-peer network server or a dedicated file server
- A network interface card in each of the computers

- A network cable between the computers
- A network device such as a switch, router or hub (required for three or more computers when using a twisted pair cable with RJ45 connectors)


Note: Wireless networks are not suggested for PastPerfect network use.

Before installing PastPerfect on a network, you must first get the network installed and operating correctly. This involves installing the network interface cards in each computer (if needed), connecting computers with network cables, and configuring the network software. Instructions for installing network interface cards and cables should be provided by your hardware supplier. Consult your Windows Operating System documentation for instructions on configuring the network software. If you do not already have a networked computer system and you do not have computer professionals on staff, you may need to hire a network installer to install the network hardware and software. For best performance your network should provide a throughput of 100 Megabits per second.

Once the network is up and running, follow these steps to install PastPerfect.

On the network file server computer

1. Close all programs on the computer.
2. Insert the PastPerfect CD into the computer's CD or DVD drive.
3. The installation program will start automatically.
4. Follow the instructions on the screen.
5. On the **Installation Folder** screen, leave the default path c:\pp5 if possible.
6. On the **Select Packages** screen, choose the **Single Computer or Server** option.
7. Continue with the on-screen instructions to complete the installation.

The installation will create this icon  on the Windows desktop that you can use to start the PastPerfect program. Start PastPerfect. From the Main Menu click **Setup** and **Network** and then click the **Install Network Upgrade** button. You will be asked to insert the Network Upgrade disc to finish this task.

NOTE

Make sure that all workstations running PastPerfect have full Read, Write, Create and Delete privileges to the folder on the server where PastPerfect was installed (by default c:\pp5).

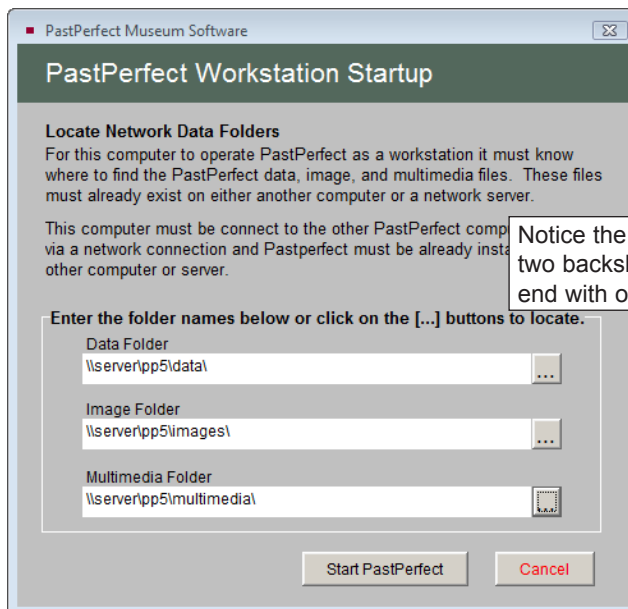
Once PastPerfect has been installed on the server, the Network Upgrade has been unlocked, and the pp5 folder has been shared so that all PastPerfect users have full access, you are ready to install the program on additional networked computers.

On the other computers (workstations)

1. Close all programs on the computer.
2. Insert the PastPerfect CD into the computer's CD or DVD drive.
3. The installation program will start automatically.
4. Follow the instructions on the screen.
5. On the **Installation Folder** screen, leave the default path c:\pp5 if possible.
6. On the **Select Packages** screen, choose the **Network Workstation** option and uncheck the **Single Computer or Server** option.
7. Continue with the on-screen instructions to complete the installation.

After the installation is complete, start PastPerfect. You will be asked to enter the folder names on the file server where the PastPerfect data, images, and multimedia files were installed. For example, if the file server computer is named "Server" and the program and data are installed in the c:\pp5 folder on the server, and the pp5 folder is shared with the name "pp5," then the entries would be "\\Server\pp5\data\" , "\\Server\pp5\images\" , and "\\Server\pp5\multimedia\" .

Figure 1-1
Network Folders
example



You may want to write your folder names here for future reference.

Data folder: _____

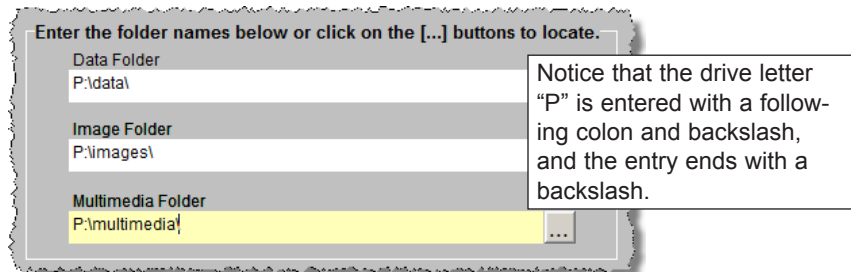
Image folder: _____

Multimedia folder: _____

The entries for the folders cannot contain spaces. For that reason, if the server computer name is "File Server" or the folder name on the server is "Program Files\pp5," it will not work. The entries "\\File Server\pp5\data\" and "\\Server\Program Files\pp5\data\" both contain a space and are unacceptable. If the server name and the folder paths must contain a space in the name for your network, use the Windows Map Network Drive feature to avoid any problems.

Windows Map Network Drive allows you to create a new drive letter to specify a distinct path on another computer. For example, you could create a virtual drive letter "P:" on the workstation computer that is mapped to "\\File Server\pp5\". In this case, the entries for the PastPerfect network folders would be "P:\data\" and "P:\images\", and "P:\multimedia\."

Figure 1-2
Network Folders
with mapped
drive



To set up drive mapping, you should consult Windows Help. Here are the instructions for Windows Vista.

1. Open Computer and choose **Map Network Drive** from the Tools menu.
2. Select the drive letter from the **Drive** drop-down menu.
3. In **Folder**, type the path to the folder you want, e.g., "\\File Server\pp5\" or use the Browse button to navigate to the PP5 folder on the server.
4. Be sure to put a check in the box **Reconnect at logon**. Without this option your drive mappings will have to be reentered each time you restart the computer.

UNINSTALLING PASTPERFECT

To remove PastPerfect software from your computer, click Computer | Uninstall or change a program.

Warning! Uninstalling PastPerfect will also remove any data, images and multi-media files that you have entered.

NOTE Instructions for installing and uninstalling PastPerfect are generally geared toward Windows Vista.

HARDWARE REQUIREMENTS

PastPerfect may be installed on any computer with a Windows operating system with the following requirements. If you already have a computer, be sure that it meets the minimum requirements. If you are purchasing a new computer, you should look for one that meets or exceeds the recommended specifications:

Recommended

Intel Pentium 4, 2 Ghz+ Processor
2 GB RAM for Windows XP
3 GB RAM for Vista and Windows 7
19"+ Monitor with 1024 x 768 Resolution
Laser or inkjet printer
CD or DVD Recordable Drive
Windows 7
High-speed Internet Access
Microsoft Word 2007

Minimum Required

1 GHz Processor
512 MB RAM for Windows XP
2 GB RAM for Vista and Windows 7
1024 x 768 Resolution Color Monitor
Laser or inkjet printer
CD-ROM drive
Windows XP
Microsoft Word 2003

Hard Drive Free Disk Space

Program: 140 MB
Data: 12 MB per 1,000 records
Images: 200 MB per 1,000 images

NOTE

Images attached using the MultiMedia Upgrade may be stored in a variety of formats that affect quality, disk storage space, and time required to display. The storage space is also affected by the size of the image.

MultiMedia Hardware Requirements

TWAIN compatible digital scanner or digital camera

CD or DVD recordable drive for backing up images and multimedia files

Network Hardware Requirements

Windows XP/Vista/Windows 7 peer-to-peer network or

Windows Server 2003 or Windows Server 2008

Network throughput of 100 Megabits per second or higher

PastPerfect is capable of holding millions of records. Choosing hardware that exceeds our preferred hardware specifications is recommended for clients with 100,000+ records.

PASTPERFECT EVALUATION SOFTWARE

The PastPerfect Evaluation CD comes preloaded with fictitious data and optional upgrades to help you learn the program. To install the evaluation software, follow the instructions above for installing PastPerfect on one computer. Please be sure to install the software to the default folder of c:\pp5eval. We recommend that you keep the evaluation version of PastPerfect on your computer to be used as a training aid. The data from the evaluation version will not be brought into the full PastPerfect program.

CONVERTING YOUR DATA TO PASTPERFECT

All PastPerfect data is stored in industry-standard Microsoft Visual FoxPro databases. If your data is already in a computer, it can probably be converted and loaded into PastPerfect. There is no need for you to manually reenter this data. Please call us or visit our website www.museumsoftware.com for more information or assistance with your data conversion.

STARTING PASTPERFECT FOR THE FIRST TIME

The first time you start PastPerfect, you will be asked to enter your organization's name and address. The organization name you enter will appear on the PastPerfect Main Menu. This name may be changed at any time from the Setup | Main Menu screen. The name and address that you enter will also be used on Deed of Gift, Temporary Custody, and Loan forms. Your organization's name and address on these forms may be changed by using Setup | Collections. Once your institution's information has been entered, click **Start PastPerfect** be taken directly to the Main Menu.

TIP

PastPerfect version 5.0 requires that your Windows screen size be at least 1024 x 768. If your screen is set to a lower resolution, right click on the Windows desktop and choose Personalize. Select the Display Settings option and adjust the resolution to 1024 x 768 or greater. Click Apply and OK to save.

UPGRADING FROM AN OLDER VERSION OF PASTPERFECT

If you already have PastPerfect and have purchased the version 5.0 upgrade, you must load your old data into version 5.0 before you can start using the program. A special import feature is provided to transfer 4.0 data into 5.0. If you have PastPerfect 3.5 or an earlier version or are using Scatter/Gather, please contact our support office for details on how to proceed.

To import your PastPerfect 4.0 data into version 5.0, perform these steps:

1. Install PastPerfect version 5.0.
2. Import your old data.
3. Reindex the new data files.
4. Rebuild Report Maker forms.
5. Remove old version.

Before you start the installation, be sure to back up all version 4.0 data, images and multimedia files to a removable medium and exit the program. The import feature will only transfer data from version 4.0E1 or higher of PastPerfect. If you have version 3.5, 3.0, 2.6, or 2.5, you will need to upgrade to PastPerfect 4.0 first.

1. **INSTALL PASTPERFECT 5.0.** Please install the new version 5.0 software. This procedure is explained in the first part of this chapter. When you install version 5.0, be sure to install it in the default folder (c:\pp5\) to ensure that it will not affect the operation of your old version. **If you mistakenly install version 5.0 into the version 4.0 folder (c:\pp4\), you will erase your existing data.**

2. **IMPORT YOUR OLD DATA.** Now you are ready to transfer your data. To do this, start version 5.0 by clicking on the new PPS 5 desktop icon which will take you to this screen.

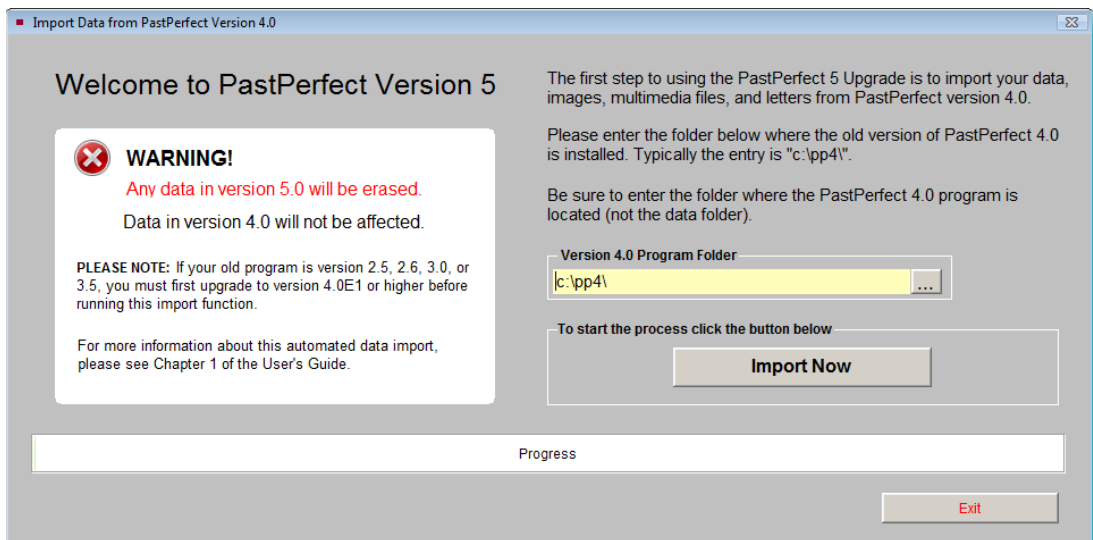
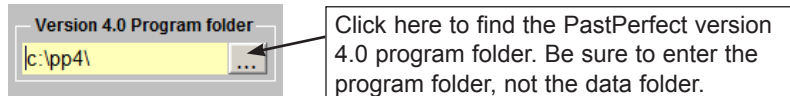


Figure 1-3 Import Data screen

You will need to specify the location of the old version 4.0 program. Usually the old program is located in c:\pp4\. However, if you have the program installed somewhere else, you will need to enter that folder name in this field.

Figure 1-4
Old Program
folder



To start the process, click the **Import Now** button. If you have more than 10,000 records, digital images or multimedia files, this process may take some time. Your empty version 5.0 will be backed up, then the import process begins. The progress bar at the bottom of the screen will show how near the import is to completion. When finished, you will see a pop up window indicating the process is successful. Click **OK**.

3. **REINDEX THE NEW DATA FILES.** Once the import process is complete, press the **Start using PastPerfect 5** button at the bottom right of the screen. This will take you to the PastPerfect Main Menu. Then, before using the program, you should select Reindex and click **Start Reindex Now** to complete the process. When the Reindex is complete, click **Exit**.

4. **REBUILD REPORT MAKER FORMS.** The transfer process will attempt to import custom reports that you may have created with the Report Maker. However, depending on the complexity of the report, it will not always be successful. In most cases you can finish the transfer by rebuilding the report layout. To do this, you just need to run the report from the Report Maker screen. Please see *Chapter 18 - Report Maker* for more information.

5. **REMOVE THE OLD VERSION.** At some point you will want to remove the old version 4.0 of PastPerfect from your computers. This can be done by using the Windows **Uninstall a program** function. Click on Computer | Uninstall a program. Be sure *not* to uninstall the new version 5.0 program. Do not uninstall the old program until you are absolutely sure that everything has transferred properly. The pp4 and pp5 folders may coexist without a problem. When you are ready to remove version 4.0, we suggest copying the full pp4 folder (with data, images and multimedia files) to CD or DVD, then start the uninstall process.

NOTE

It is possible to rerun the data import function again after you have already started using PastPerfect 5.0. However, please be aware that this process will ERASE all data in version 5.0 so use it only when you are sure this is what you want to do.

The data import procedure can be run from the PastPerfect Main Menu by selecting Utilities | Import | Import Data from PastPerfect Version 4.0. To open the import screen you will need to enter the password go50.

WHAT'S NEW IN VERSION 5.0

This new version of PastPerfect is a major upgrade and contains hundreds of new features. Here is a list of some of the new features you will see:

GENERAL

- Capability to handle over 3 million catalog records with almost one million records in each of the 4 catalogs
- Ergonomically designed screens with centralized navigation in a left sidebar
- New screen layouts and larger screens for easier data entry
- New Main Menu slide show options allow you to select images from specific catalog records
- Custom Main Menu color scheme and button design
- Mapping Feature allows you to use programs such as MS Streets & Trips, MS Map Point and Google Earth Pro to map items by sites or contacts
- View text in Memo fields in Browse mode by mousing over the field
- Inventory Manager Upgrade allows for easy inventory tracking

ALL CATALOGS (OBJECTS/ARCHIVES/LIBRARY/PHOTOS)

- Catalog Lists will revolutionize how you use PastPerfect. To select records, you can use Research or select records individually for lists that can then be viewed, printed, moved to outgoing loans, exhibits, and more
- Ability to rename home and temporary location fields

- Custom screen can be renamed and set to default screen view on catalog records
- Adding a range of records for similar items to speed data entry
- Ability to attach digital images to Detailed Condition Reports
- Ability to place catalog records on "Exhibit Prep"
- Ability to recall deaccessioned items
- Additional fields saved in Deaccession catalog

LEXICON

- Incorporates the latest standard, *Nomenclature 3.0 for Museum Cataloging*
- Ability to have up to 3 different Object Names for one item

ACCESSION AND INCOMING LOANS

- Activities tracking
- Additional fields in Incoming Loans for notes and instructions

TEMPORARY CUSTODY

- New custom fields (2 character, 1 date, 2 numeric, and 1 memo fields)

PEOPLE BIOGRAPHIES AND SITE & LOCALITIES

- New custom fields (5 character, 2 date, 2 numeric, and 2 memo fields)
- Additional fields in Sites & Localities for archaeology and location details

CONTACTS (MEMBERSHIP)

- Contacts Lists allow easy creation of lists for mail merges and more
- Unlimited number of Contact Lists
- Define fiscal year
- Ability to use MS-Word as the word processor for mail merge letters
- More custom fields (character, date and numeric (currency) fields)
- Valid email address check upon saving a contact record
- Email Setup testing feature

RESEARCH

- Customize the fields used in creating Queries and in Find
- Customize the fields when viewing query results
- View query result images in thumbnail view

REPORTS

- Ability to save two custom layouts for all reports
- Redesign of Report Maker to make it easier to use and more versatile. You can now use pull down menus to create the filter statement, select output fields and sort order.
- Customize the fields available when building Report Maker reports
- Browse Data option to view report results

UTILITIES

- Recycle Bin enables you to easily recall deleted records
- Save 30 compressed backups to hard drive
- Save backups to CD, DVD, flash drive or other removable drive with just a few mouse clicks
- Import and Export functions allow easy field selection
- System Information contains information about your computer and other users in the program to speed troubleshooting
- Easy FTP transfer of error log, backups and other files to support office

VIRTUAL EXHIBIT

- Redesign of Virtual Exhibit to incorporate easy-to-use CSS Templates
- Virtual Exhibit incorporated into the PastPerfect interface

These new features will be explained in detail in the following chapters.

