PastPerfect
Data Entry Rules for
Objects Records

To Open and Log Into PPS:

- Open PastPerfect using shortcut on desktop.
- Log in using your username and password.
    - If you do not have one, contact the Archivist or Director.
- On left side of screen, click on the Archives icon.

To Create a New Record:

- To create a new record, click on **+ADD** on top Menu Bar.
    - A new window will open: **ADD NEW CATALOG RECORD**
- Enter **Accession Number** if known.
    - The source name will automatically fill if an accession records already exist in PPS.
- Enter **Object ID**
    - This number must be unique with no duplication.
    - Use leading zero when necessary
- Enter **Object Name**
    - Use Authority File when possible
    - If not, click on Lexicon button
        - Select Category
        - Select Classification
        - Select Sub-classification
        - Find correct Primary Term
            - Some will have Secondary and Tertiary Terms.
        - Click on correct term and it will highlight yellow
        - Click on the Select as Object Name box at bottom.
- Select **Add a Single Record**
- Choose from either:
    - **Blank Record**: no fields pre-filled
    - **Current Data**: Copies from previous record
    - **Default Data**: Pre-fill commonly used fields
        - Use the Buttons below to set the **Default Data**

- Finally, click **Add New Record**.

To Find and/or Edit Records:

- Click the **Find** button
- In the **By Indexed** field, choose **Objectid (num)**. Type in the object number you want to find and click **Find Now**.
- Click **Edit** button

Authority Files and Function Key Shortcuts:

- **The field that is being edited will be highlighted yellow**.
- Many fields have **Authority Files**. These are shortcut list of often used terms for that field.
    - If a field has an Authority File, a blue square with an "a" will appear to the right of the top menu.
    - To access the Authority File, either right click or use F7.

- Shortcuts can also be made by using the **Function keys**
    - To set up Function key shortcuts, on the PPS home screen, click on the **Setup Button** at the top left corner.
        - Select Function Keys from drop down menu
        - Function Keys F3-F12 can be used for often typed phrases or words.
        - F7 is reserved for Authority File access
        - F8 is reserved for today's date
            - [date]

Object Record Fields: (organized by how the fields appear on screen)

- **Collection**: Enter full name of Collection.
    - Use the **Authority File** for consistency
    - Example: AHSGR Museum Collection
- **Object ID:** Every Object ID number must be unique number.
    - **No duplicates** are allowed
    - Use leading zero for sorting purposes
    - For Objects:
        - Example: 2023.001.001
- **Object Name:** Taken from Nomenclature 3.0
    - Use Authority File when possible
    - If not, click on Lexicon button
        - Select Category
        - Select Classification
        - Select Sub-classification

        - Find correct Primary Term
            - Some will have Secondary and Tertiary Terms.
        - Click on correct term and it will highlight yellow
        - Click on the Select as Object Name box at bottom.
- **Other Number:**
- **Old Number:** Use for any old or alternate number found with the object
- **Accession#:** Donor number
    - **Example:** 2023.001
- **Home Location**: This will be automatically filled in from the **Location Tab** at left.
- **Date:** Enter if date is known using the following format: **YYYY/MM/DD**.
    - If the date is an estimate, enter the year followed by (circa). This will help with how the computer sorts the data.
        - 1930 circa
- **Year Range:** Approximate year range if exact publication is not known
- **Catalog Date:** The date the PPS record was created.
    - Use **F8** for today's date.
- **Catalog By:** Person who created record.
    - Use First and Last Name
        - Example: Jane Smith
    - Use Authority file or set up function key shortcut
- **Status Date:** Date the item was last inventoried.
    - For new records, this will be the same as the Catalog Date.
- **Status By:** Person who inventoried object or collection
    - For new records, this will be the same as Catalog By.
- **Status:** the status of the object or collection
    - Select "OK" if the object is on the shelf where it is supposed to be
- **Choose the History radial button.**
- **Description:** Description of the map.
    - Should be written in full sentences as this will eventually be view by the public.
    - Keep description short but helpful. Imagine describing the map to someone without it in front of you.
- **Collector:** If the object is part of a collection, this is where you put the name of the Collector.
    - Example: Flagel, Arthur
- **Collection Date:** The date the object was obtained by the collector if known (not the date given to AHSGR).
- **Site/Site#:** Leave blank. This is for archeological site information.
- **Place of Origin:** The place where the object was created or manufactured.
    - Example: Merkel, Volga region, Russia

- **Event:** This field provides a way to create named events for which you have objects in our collections
    - Example: World War I, 4th of July, etc.
- **Material:** Choose from the Authority list what materials the object is constructed of.
- **Found:** Where the object was found.
- **Made:** The name of the company or manufacturer.
- **Used:** In one or two words, how was the object used,
    - Example: Tea service
- **Owned:** If known, name of the previous owner.
- **Title:** A word, phrase, or short description of the object.
    - **Example:** Sadler Teapot
- **Creator:** The name of the person who created the object.
    - Use the same general procedures for names (see Assigning Collection Name and Numbers), but do not use all capital letters.
    - Use Authority File when possible.
    - Last name, First name, birth-death.
    - Examples:
        - Smith, John, 1900-1980
        - Doe, Jane (Smith), 1901-1975
- **Role:** If known, choose role of creator from drop-down list.
    - Leave blank if unknown.
- **Provenance:** Brief history of the object.

- **At left click on Condition button.**
- **Condition:** Choose from Authority File
    - **Excellent:** Map is excellent condition with no fading, tears, or creases.
    - **Fair:** Map has some fading, tears, or creases
    - **Good:** Map has minor fading, tears, or creases.
    - Not Rated: Do not use
    - **Poor:** Map is fragile with many tears and creases and shows signs of heavy fading.
    - Stable: Do not use
    - Unstable: Do not use
- **Date:** Date the condition was assessed.
- **By:** who did the condition assessment
- **General Condition Notes:** description of condition.
    - Note any tears or stains
    - Recommended treatment.
- **Maintenance Scheduling**
    - **Start Date:** Fills with today's date automatically

  - **Drop down menu:** choose for next scheduled maintenance
    - **Usually 5 years.**
  - Maintenance notes: What to look for at next evaluation

- **At left click on Dimensions**
- **Display units:** Usually choose in/oz.
  - Record measurements to the nearest sixteenth of an inch if possible.
  - Enter in decimal form.
- **Hight:**
- **Width**
- **Length**
- **Depth**
- **Diameter**
- **Circumference**
- **Count**
- **Weight**
- **Dimension Details:** Use to record additional information about the size, shape, and any additional measurements that cannot be readily recorded in the Print Size field.
  - **Example:** painting 5”x7” and frame 7”x9”

- **At left click on Location.**
- **Home Location**
  - **Building:** HQ
  - **Room:** Collection, Library, Vault, etc.
  - **Wall:**
  - **Cabinet:** Cabinet number
  - **Shelf:** Shelf number
  - **Drawer:** Drawer number
  - **Container:** Box number
- **Last Inventoried Date:** Today’s date
- **Inventoried by:** Person doing the inventory

- **At left click on Notes & Legal**
- **Web Rights:** Choose appropriate copyright notice.
  - If not known, choose “Copyright Not Evaluated”
  - If there is no copyright or map is in public domain, choose “No Known Copyright”
- **Legal Status** may be used for further explanation.

- **At left click on People-Subjects-Classification-Search Term**

- **People:** Enter the names of all the identified people featured in the photograph. Use the Library of Congress general procedures for names.
    - **Authority file** is available. Always check first to eliminate duplicate entries. Be consistent!
    - **Last name, First name, birth-death.**
        - Smith, Joe (Joseph Paul), 1888-1988
    - **For women**:
        - Use their name at the time of the event. In the biography authority file, note other names known as. List a woman by her maiden name when pictured as a child and her married name as an adult (after wedding).
        - Put **maiden names** in parenthesis
        - Example:
            - Doe, Jane (Smith), 1888-1988
    - For more details see:
- **Classification:** This field is controlled by an **authority file**.
    - When the cursor is in the Classification field, press F7 or right mouse to display the authority file.
        - For the Map Collection, the classification should be **Maps**
- **Subject:** The Subjects authority file comes pre-filled with the Library of Congress Thesaurus for Graphic Materials I: Subject Terms (LCTGM I).
    - This Subjects file provides terms for subject indexing of pictorial materials, particularly collections of historic photographs.
    - To learn more about LCTGM 1 go to: www.loc.gov/rr/print/tgm1/.
    - Use searchFast to find new subject headings to add, https://fast.oclc.org/searchfast/.
- **Search Terms:** Search terms may be used to record any terms, words, or names that will be helpful in researching the catalog database.
    - **Search Term** method is designed to provide an access point into our catalog records that is based on terms created by and for AHSGR particular institution.
        - For example, family names or local places of importance.
        - PastPerfect automatically creates the Search Terms authority file based on the entries in the catalogs' Search Terms field.
        - By clicking **By Search Term** in Research, the Search Terms authority file will be displayed on the screen.
    - Use this to catalog the **names of specific regions**, **villages, rivers, etc.**
        - Example: Morgentau (Russia); Volga Region (Russia),
- **Save record.**

Image Management

Attach an image (.jpg)

- Click on the **Image Management button** below the image box in the upper right corner
- At top right under **Acquire New Image**, click the **Open File** icon (blue window with multi-colored boxes) at right.
- A new **Open window** will pop up.
- From the Look In **drop down menu**, select the location of image you want to copy and attach to the PastPerfect record
- Locate the folder the image resides and double click on the image or click Open.
    - Do NOT attach high resolution .tiff images.
    - **Attach low resolution (200-300 dpi) .jpg images only.**
- The **Image Metadata** window will open in PastPerfect. Fill out the record with information about the digital image.
- **Click OK when finished**
- **Multiple images** can be attached to a single record. To do so, repeat steps 3-7.
- Click the **Exit button** in the lower right to return Catalog record.

Data Entry Tips and Tricks:

- Fields turn **yellow** when they are active and ready for data entry.
- When entering duplicates, or copies, you can copy information from already completed records by using the **Fill with Current Data option**:
    - Find the record for the similar item
    - Click on the Add button
    - At the bottom of the Add New Photo screen, click on the **Fill with Current data** button at the bottom
        - This will copy everything from the current Photo Catalog Record
- When entering similar items or information, you can pre-fill fields to save time by using the **Default Data** option:
    - Click on the Add button
    - At the bottom of the Add New Photo screen, click on the **Fill with Default data** button at the bottom
        - Click the **Change Default Data**
            - Pre-fill fields
            - If you pre-fill the dates, be sure to update the field each day you do data entry.
        - The Default Data will then appear on all new Photo Catalog records
- **Authority Files** are a great way to save time and make sure that data and the way that data is entered is consistent.

  - The F7 function key has been dedicated as the Authority File shortcut. You can also "right-click."
  - If you are unsure if a field has an authority file, look to the lower right of the record screen. A yellow box appears when a field has an authority file.
- **Function Keys** can set up as data entry short cuts.
  - On the main PastPerfect home screen, go to the Setup button at the far right.
    - On the menu that pops up, click on Function Keys.
    - Enter the text or phrase you wish to have entered whenever you press that function key.
    - For today's date, enter in **[date].**
- **To cut and paste** from one record to another
  - Ctrl C to copy
  - Ctrl V to paste
  - Ctrl X to Cut

Tips and Tricks for Looking Up Objects

- **Using the "Find" button to look through a collection**
  - Instant Find:
    - Use the dropdown menu to select the category, like ObjectID(num) or Collection.
    - Type in the Object number and this will take you to the first record of the collection.
    - Use the "Next" button to scroll through the full records
    - Click on "Browse" to look at the information in a table format
  - Field Search:
    - This can be used for keyword searches, but the Query button works better
    - Searches will take a long time
- **To scroll through <u>only</u> the records with digital images attached**
  - On the record screen, click on the Image Management button under the image
  - To go to the next image, click on the button above the upper right of the image that has "Image" and an arrow. The Next button will take you to the next record that might not have an image attached.
  - At the bottom right (above the Exit button) is the Description/People button. This will replace the imaging tools with the Description text box.
  - To print, close the Description and click on the print icon.
    - If you print from the Image Management Screen, it will print a large picture with the description.

        - If you print from the Record Screen, it will print all the information in the record and a small thumbnail.

- **Queries**
    - Queries are keyword searches.
    - It is best to search in the Description Field. This can be done with a single search.
        - On the Query Screen, select Description from the Field dropdown menu.
        - "Contains text" is usually best option but there are other options to choose from
        - Type the keyword you are searching for in the "What" field
        - Make sure the "or" button is selected (not the "and" button). Also make sure the "match case" button is NOT selected.
        - Repeat for the second line except select "Title" from the Field dropdown menu.
- **Using Browse**
    - Browse allows you to look at the information in table form
    - To sort, start on the main record screen. At the top right is a dropdown menu titled "Sort by."
        - To sort by RG number, use **ObjectID(num)** for best results.
    - You can select which field and the order in which they appear in Browse
        - On **Main Menu**, go to Setup in upper left.
        - Select **Browse** from dropdown.
        - Select **Archives**.
        - To select a field, **double click**
        - Drag the field name to desired order by clicking and holding down the grey box next to the field name.