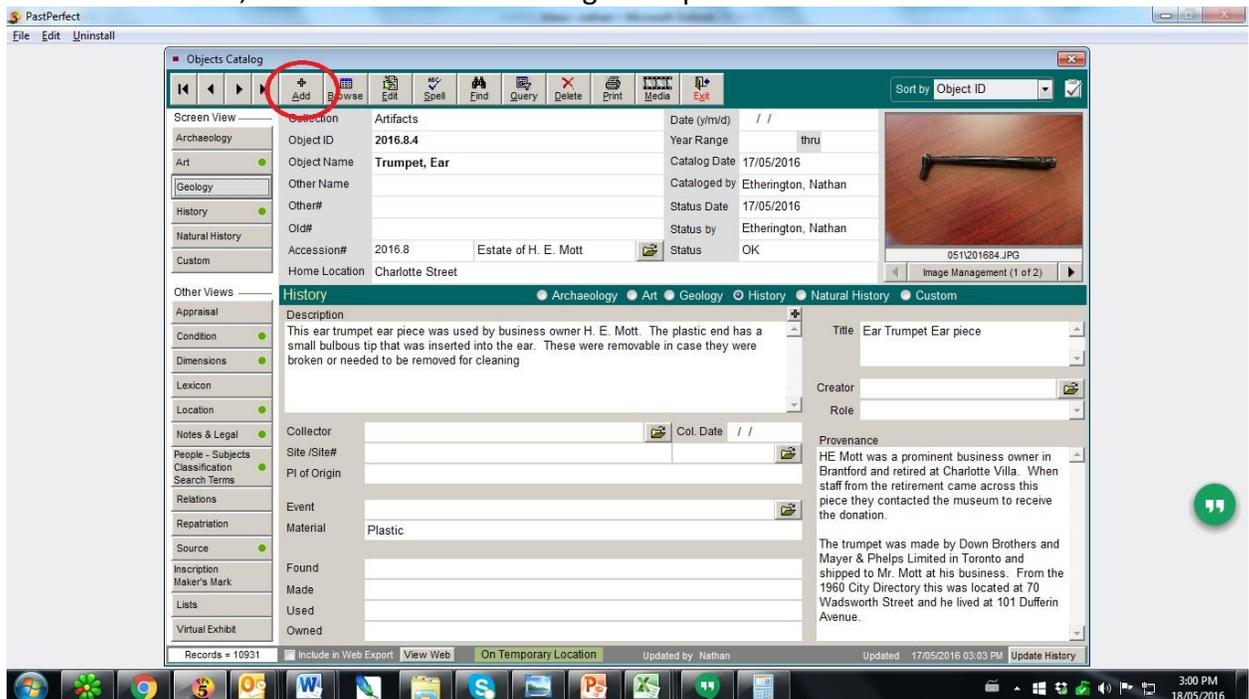


## Entering Objects Documents in PastPerfect

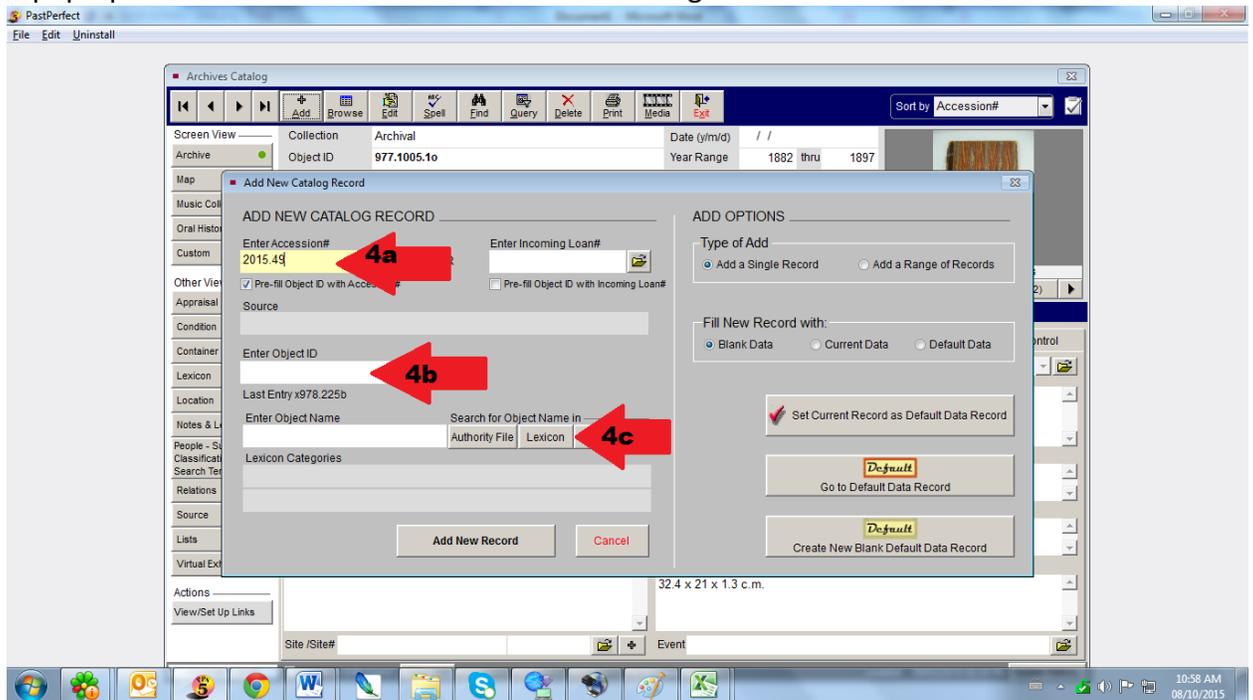
1. Load the Past Perfect Program and log-in with an appropriate account.
2. From the Main Screen, click on the "Objects" Icon, located in the left column.



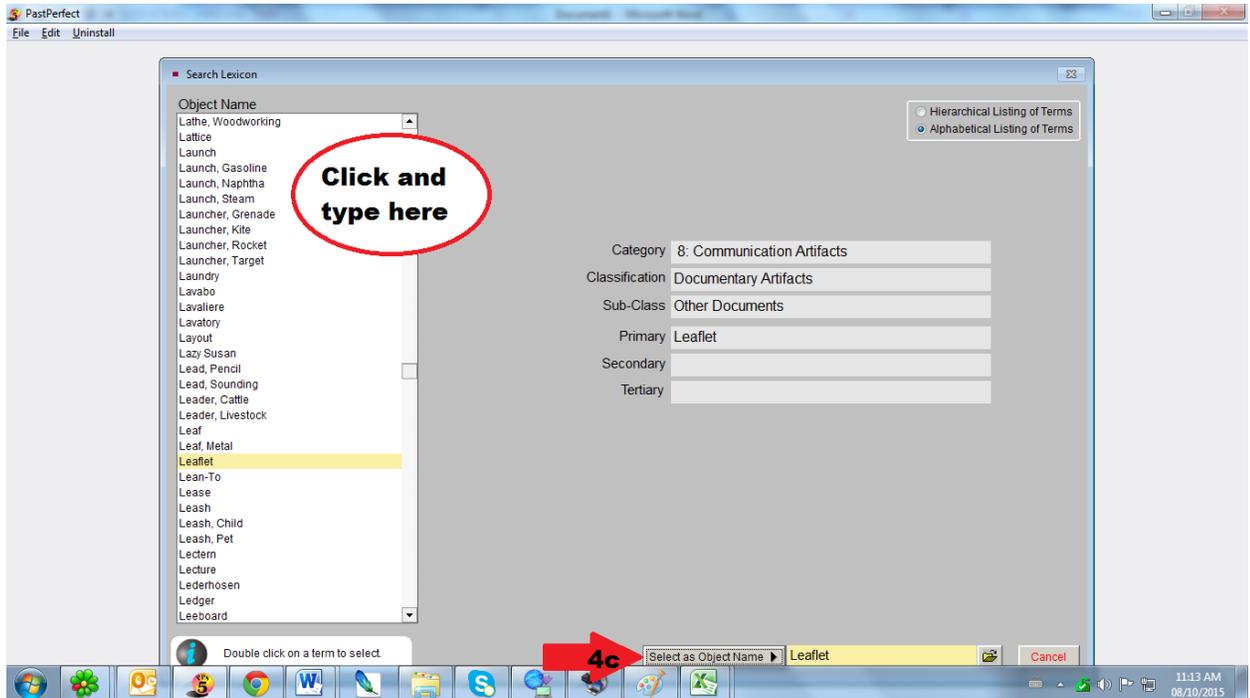
3. The Object Catalogue will load with the most recently accessed record. To add our artifact document, Click the Add button along the top toolbar.



4. A pop-up window will load entitled “Add New Catalog Record” as below:

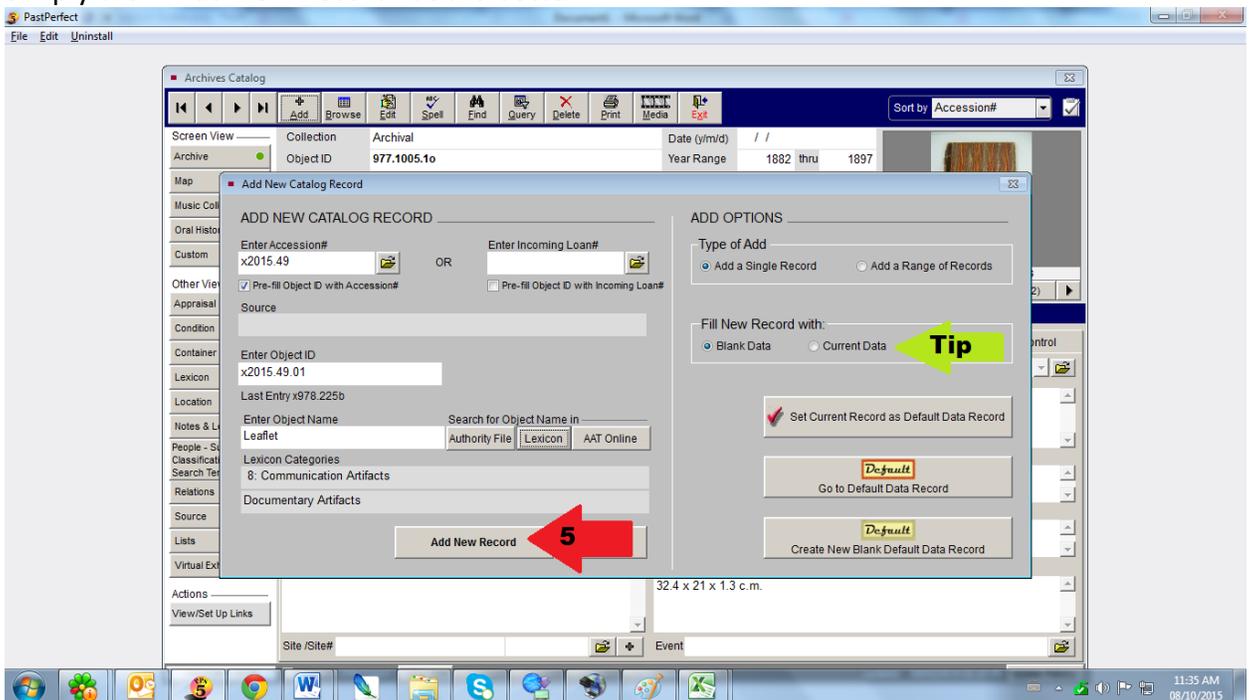


- Enter Accession # - Type in the first two parts of the Accession Number (eg. – for an object with the number X2015.49.01, you only enter “X2015.49”)
- Enter Object ID – The number that you typed in 4a should be copied below. Then enter the final digit here. (Eg. – using the above number, you should type “.01” so that the whole line will read the complete number on the object, X2015.49.01.)
- Enter Object Name – You must enter the Object name using the Lexicon or Nomenclature that the inventory system uses. If you have problems with what to call an item, you can always refer to the Green Nomenclature 3.0 Book in the Archives. Simply click on the Lexicon button and another screen will pop up with an alphabetical list of the Lexicon terms.



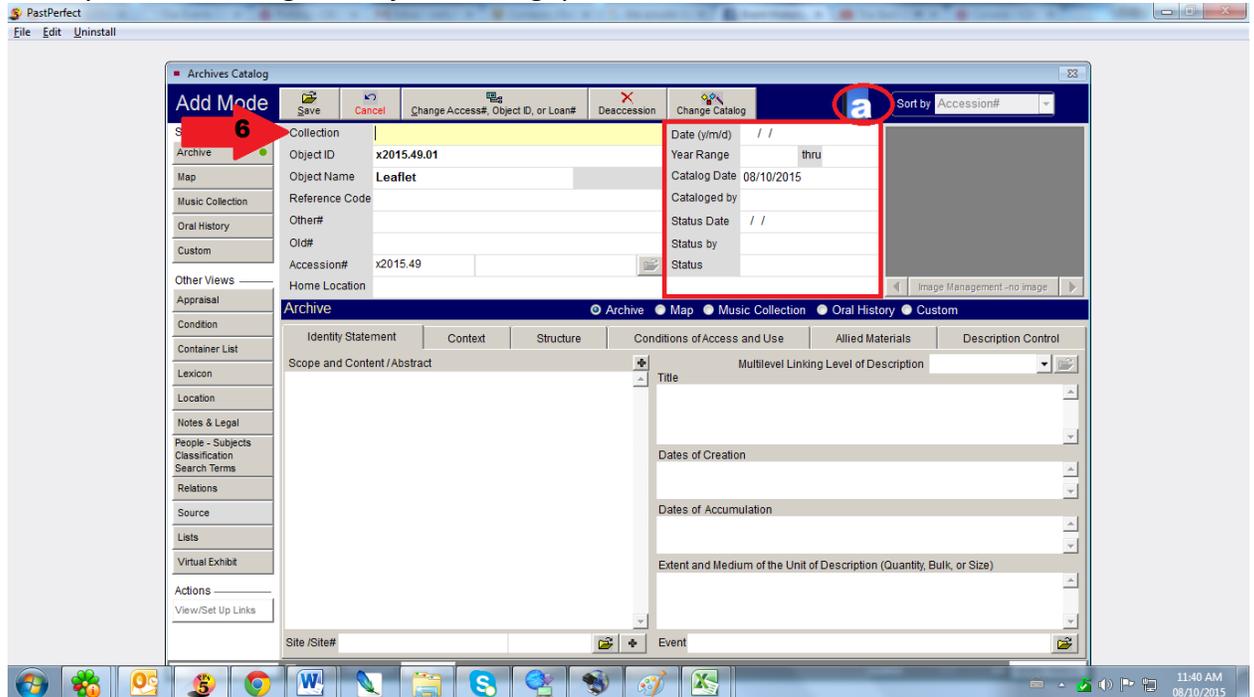
Click in the list and start typing the Lexicon term you wish to use (Eg. – I wanted the term “Booklet”, which does not exist in the Lexicon; However, “Leaflet” is the proper Lexicon term). Once you have found your term, double click the line and the classification will complete on its own. Finally, click the “Select Object Name” button at the bottom of the screen.

5. You are now ready to add the record and begin entering information on the object. Simply click “Add New Record” at the bottom.



**Tip: If you are adding multiple entries of the same or similar object, you can load the previous entry that you want to copy before adding and then click on the “Fill New Record With Current Data” option and it will copy everything into the new entry automatically.**

6. A blank record will load with the Collection Field Selected. Notice across the top toolbar a blue book with a white letter overtop. This means that there are a number of pre-defined options that you must select from. **NEVER** type in these fields. In order to select from the pre-defined options, either right click in the field or press F7 on your keyboard. Since you are entering the Object Catalog, you should select “Artifact”.

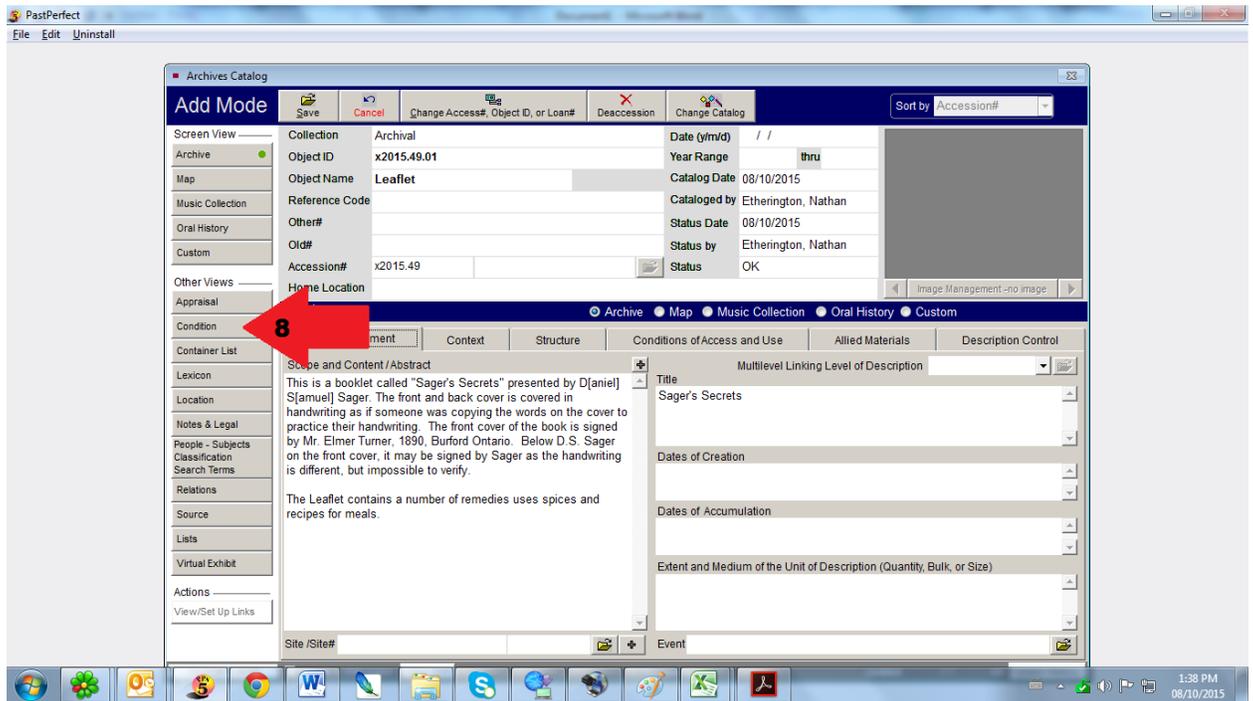


To the right of this field is another series of field that need to be filled out. The first two lines are only used if we know the date that the artifact was created. This could be found by a date stamped on the artifact or a manufacturers mark. The next field is Catalogue Date which can be entered by hitting F8, this will automatically insert today's date. The next field is Catalogued By and can be entered by hitting F7 and selecting your name from the list. Status Date and Status By are entered as above similar to Catalogue Date and Catalogued by. The last field is Status, which can be entered by hitting F7 and selecting the option from the list (for our purpose, “OK” should always be entered).

7. Next we can enter information in the bottom half of the screen. You should start at the top of the right hand column and work your way down before entering information into the “Description” field.

- a. Title - Every Object needs a Title. Pick an appropriate title that makes it easy to identify such as the name of the book and perhaps a year if there are more than one. For example, if the object is a ledger, we have several different ledgers from several different companies over several years. So an appropriate title may be “Ledger from Brant Mutual Insurance Company 1883-1887”.
- b. Provenance – Provenance is a fancy term the means the history of the object. Some people would argue that this is the most important field. For example, we could have a random top hat or we could have the top hat that was worn by Alexander Graham Bell at the unveiling of the Bell Memorial. This is the information that we would include in this field. If we don’t have a provenance, we leave this field blank
- c. Description – This field describes the artifacts itself. You can describe its appearance, colour, unique attributes, details on the construction, or techniques used in the making of an artifact.
- d. Material – This field is a predefined field that we can add the materials that the object is constructed. For example, if we were dealing with a textile, we could identify if the object was made of cotton, wool, or some other fibre. There is quite a long list that you can choose from. Double clicking a material from the list will add it to the entry and you can add multiple types of materials.

- We are now ready to switch screen to the condition screen. You can navigate to this screen by clicking the "Condition" button located along the left-hand vertical column under "Other views".



9. On the Condition Page, there are only 4 fields to fill out which are “Condition”, “Date”, “by”, and “General Condition Notes” indicated by the Box.

The screenshot shows the 'Archives Catalog' application in 'Add Mode'. The 'Condition' section is highlighted with a red box. The fields in this section are:

- Condition: A dropdown menu with a 'Date' field next to it.
- by: A text input field.
- General Condition Notes: A large text area for notes.

Other visible fields in the 'Add Mode' window include:

- Collection: Archival
- Object ID: x2015.49.01
- Object Name: Leaflet
- Accession#: x2015.49
- Date (y/m/d): //
- Year Range: thru
- Catalog Date: 08/10/2015
- Cataloged by: Etherington, Nathan
- Status Date: 08/10/2015
- Status by: Etherington, Nathan
- Status: OK

The 'Detailed Condition Reports' table is also visible, with columns for Date, Type, Condition, and Condition by.

- Condition – Enter the Condition of the Object by hitting F7 and select one of the options from the screen (Excellent, Good, Fair, and Poor).
- Date – Date can be entered by using the F8 shortcut.
- By – Enter your name by hitting the F7 button and selecting your name from the list.
- General Condition Notes – This field would be used to note the reason why the object is not in excellent condition. This could refer to rips, tears, or holes in the paper, water damage, and discolouration of paper. Example: “The pages of the leaflet have yellowed, the edges are extremely worn with several nicks around the edges. Several of the pages are dog-eared.”

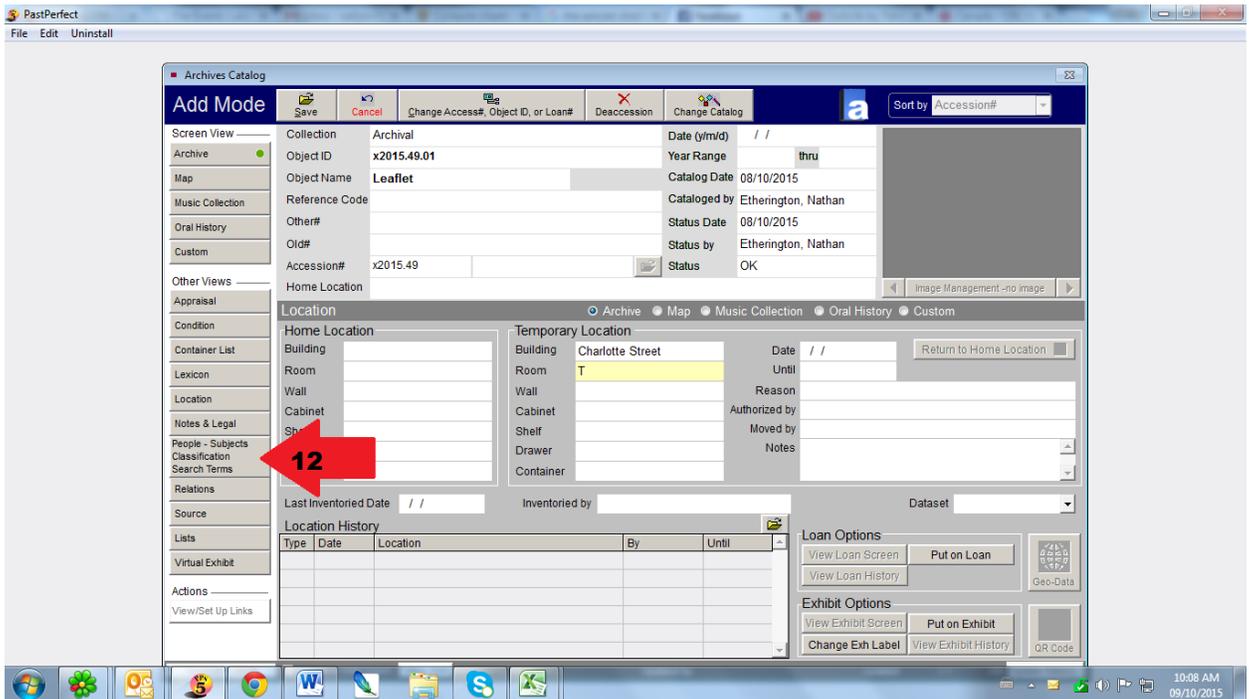


11. When this screen loads, you will notice that there is a home location and temporary location section. The home location will be updated after the move to the mall site. The temporary location is what we will use now:

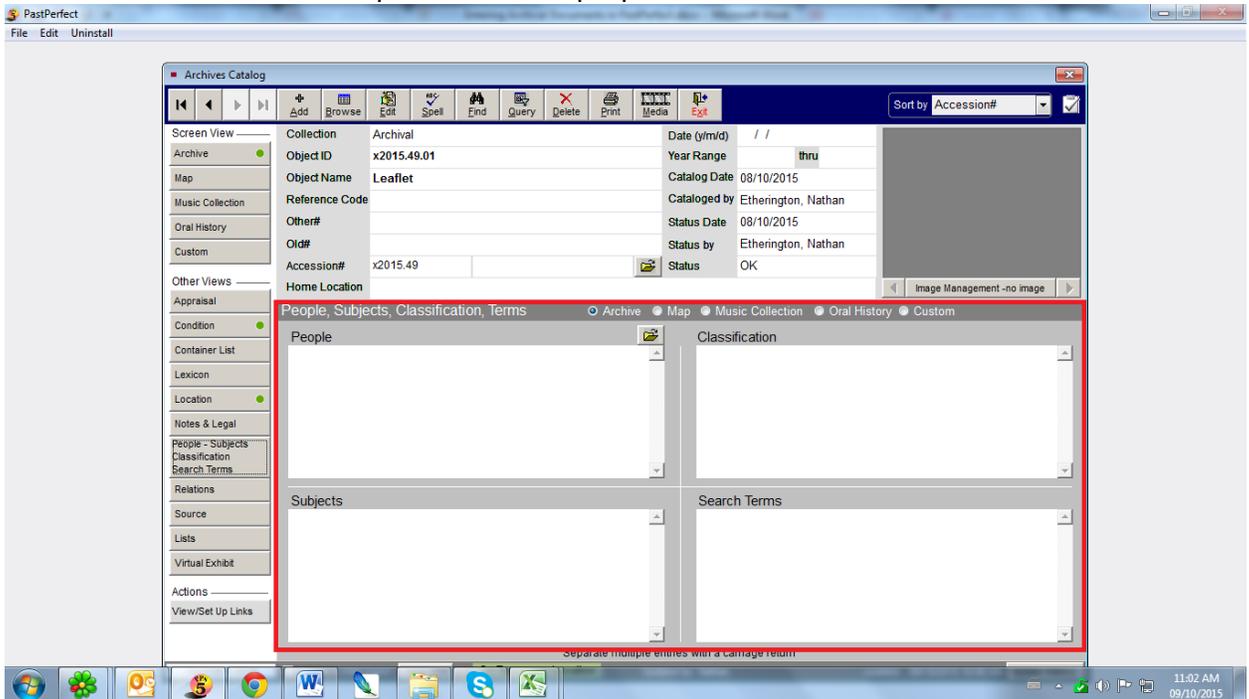
The screenshot shows the 'Archives Catalog' software in 'Add Mode'. The 'Temporary Location' section is highlighted with a red box. The interface includes a top menu bar with 'Save', 'Cancel', 'Change Access#, Object ID, or Loan#', 'Deaccession', and 'Change Catalog'. A left sidebar contains various navigation options like 'Screen View', 'Archive', 'Map', etc. The main area is divided into 'Home Location' and 'Temporary Location' sections, each with fields for Building, Room, Wall, Cabinet, Shelf, Drawer, and Container. A 'Location History' table is at the bottom left, and 'Loan Options' and 'Exhibit Options' are at the bottom right. The Windows taskbar at the bottom shows the time as 9:18 AM on 09/10/2015.

- Building – Hit F7 to enter this field and select “Charlotte Street”.
- Room – Hit F7 to select “W” for the room.
- Drawer – Once the item is packed, this field will be filled with “Material: Textile”.
- Container - Once the item is packed, this field will be filled with “Box 12”.

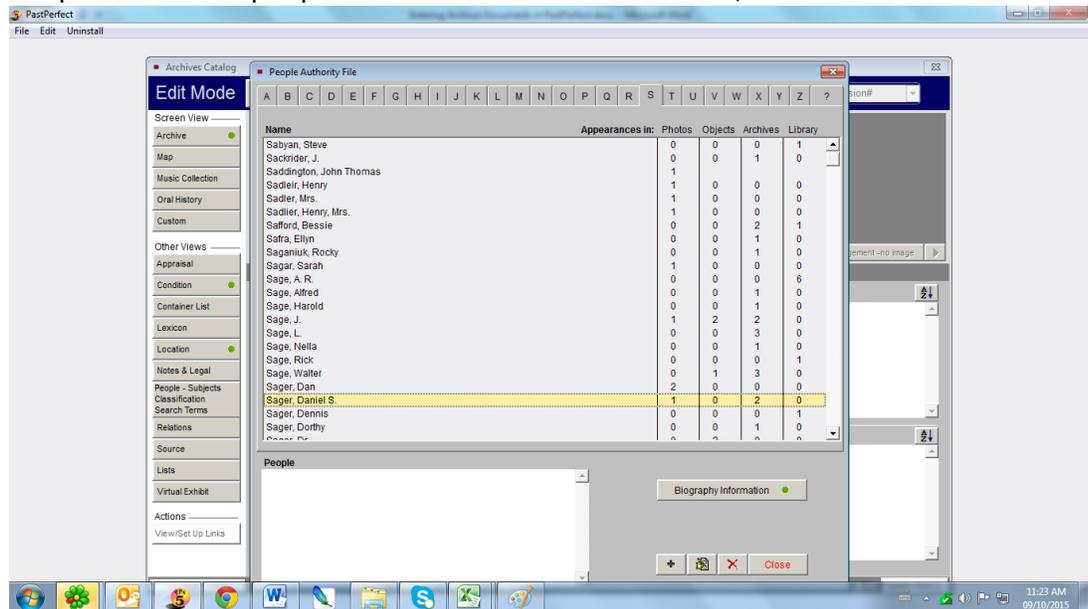
12. Now that the location has been entered we can switch to the “People – Subjects Classification Search Terms” Tab.



13. There are four areas that we use for to enter search terms for finding articles within the collection and is the most important for the purposes of research.

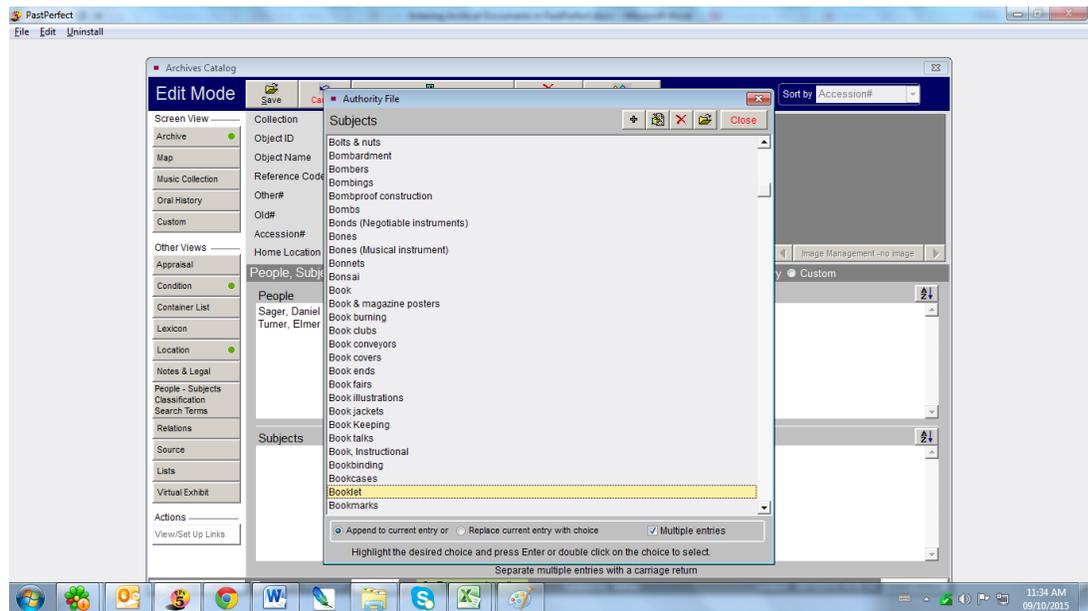


- a. People – To select people tied to the Archival Document, hit F7 to load the list.



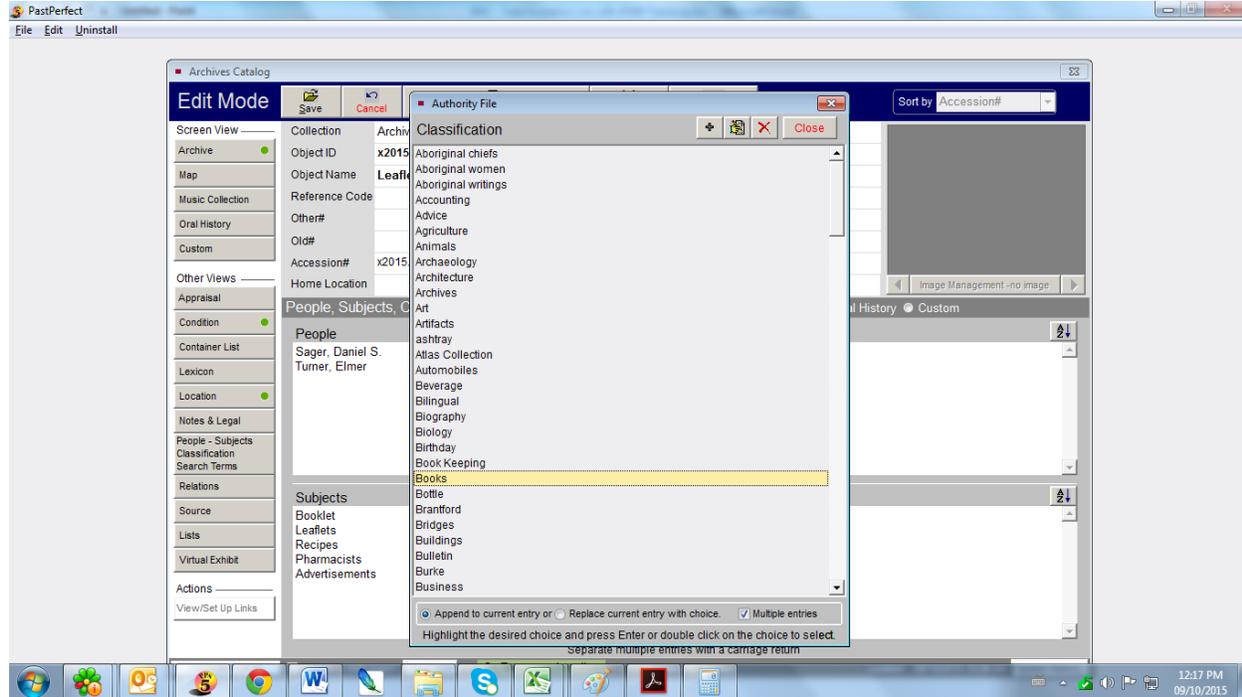
The names are organized by Last Name, First Name. Across the top are the letters of the alphabet. Looking for “Daniel S. Sager”, you would click on the “S” tab, click in the list of names that are populated and start typing “Sager” to get to the right name. Once you double click the name, it will appear in the People Box below. You don’t have to add every name, but the most pertinent names to the object. For example, if the document includes every member of a committee from 1875-1975, you wouldn’t these names to people. The author of the document should only be added if they are a local author. If a name does not appear, click to “+” button and type in the name, hit enter, and then find the name in the list to add as above. Continue adding any names associated with the archival document. When you are finished, click on the “Close” button located in the bottom right hand corner.

- b. Subjects – To select from the list of subjects hit the F7 button and the following screen will load:



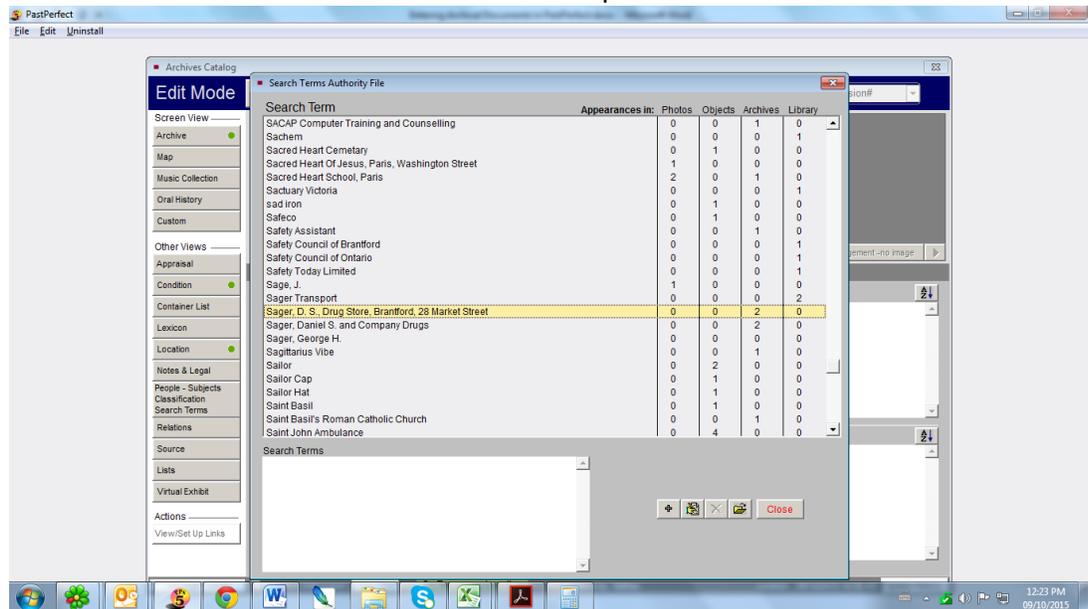
Unlike the “People” screen, this is a continuous alphabetical list of subject terms. For my Leaflet, you might add words like “Booklet”, “Leaflets”, “Recipes”, “Pharmacists”, and “Advertisements”. Click in the list and start typing the keywords that you might search for when looking up the document. After you add each term, a pop up window will notify you that it has been successfully added. Click “OK” to close this box. Once you have added all your subject words, click the “Close” Button at the top right-hand corner.

- c. Classification – This screen is similar to the last screen, but the number of terms is significantly less. To access the classification list, hit the F7 button.



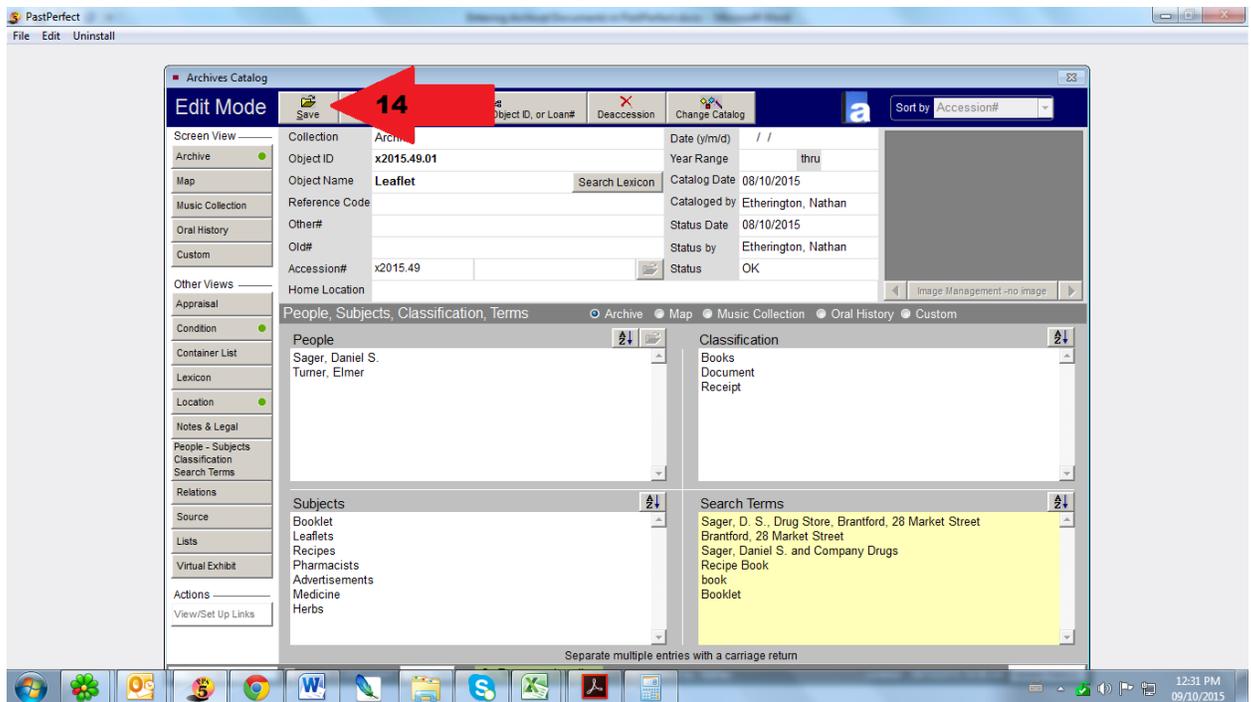
Scroll through the screen and look for classification terms that would work with your archival document. Double-click to add the terms you want. After you add each term, a pop up window will notify you that it has been successfully added. Click “OK” to close this box. Once you have added all your Classification words, click the “Close” Button at the top right-hand corner.

- d. Search Terms – Search Terms is the most comprehensive list of index terms.



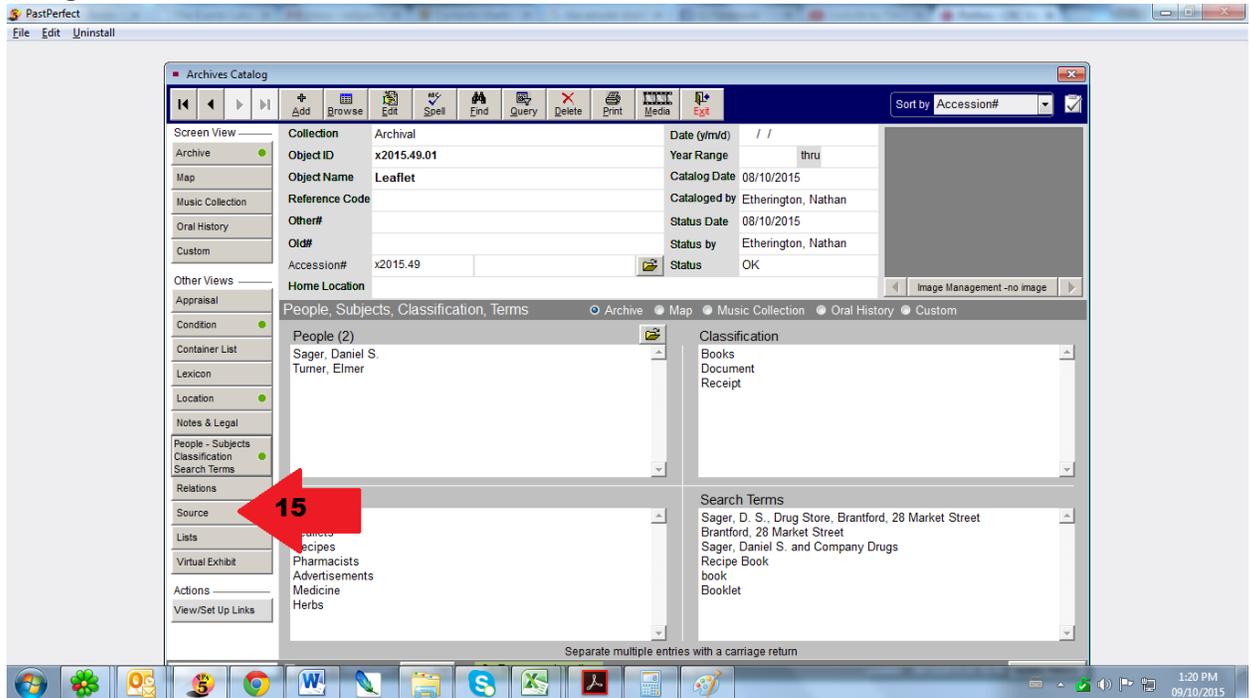
Similar to the last two screens, you can access the list by pressing F7. Type the search terms that you would use in describing the document. After adding all the appropriate Search Terms, click the “Close” button in the lower right-hand corner.

14. There is one final thing that we need to enter before finishing the entry. However, you cannot do that until the Record has been saved.

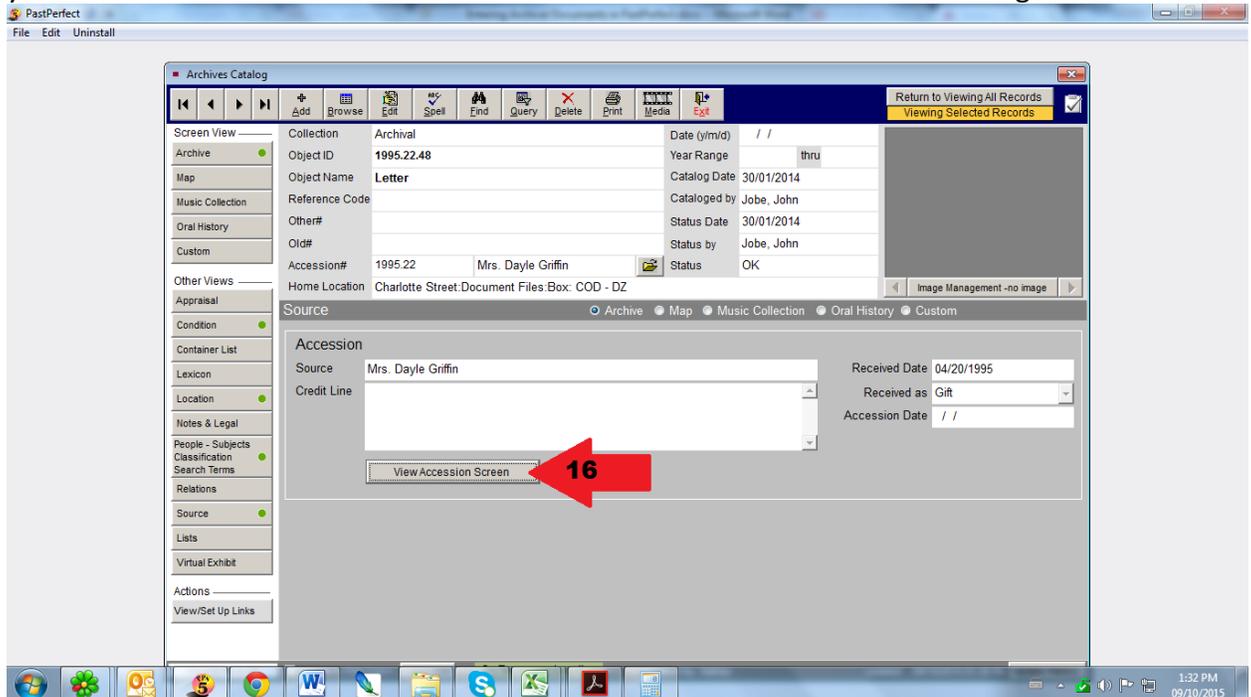


To save the record Simply click the “Save” button at the top toolbar on the left-hand side of the Screen.

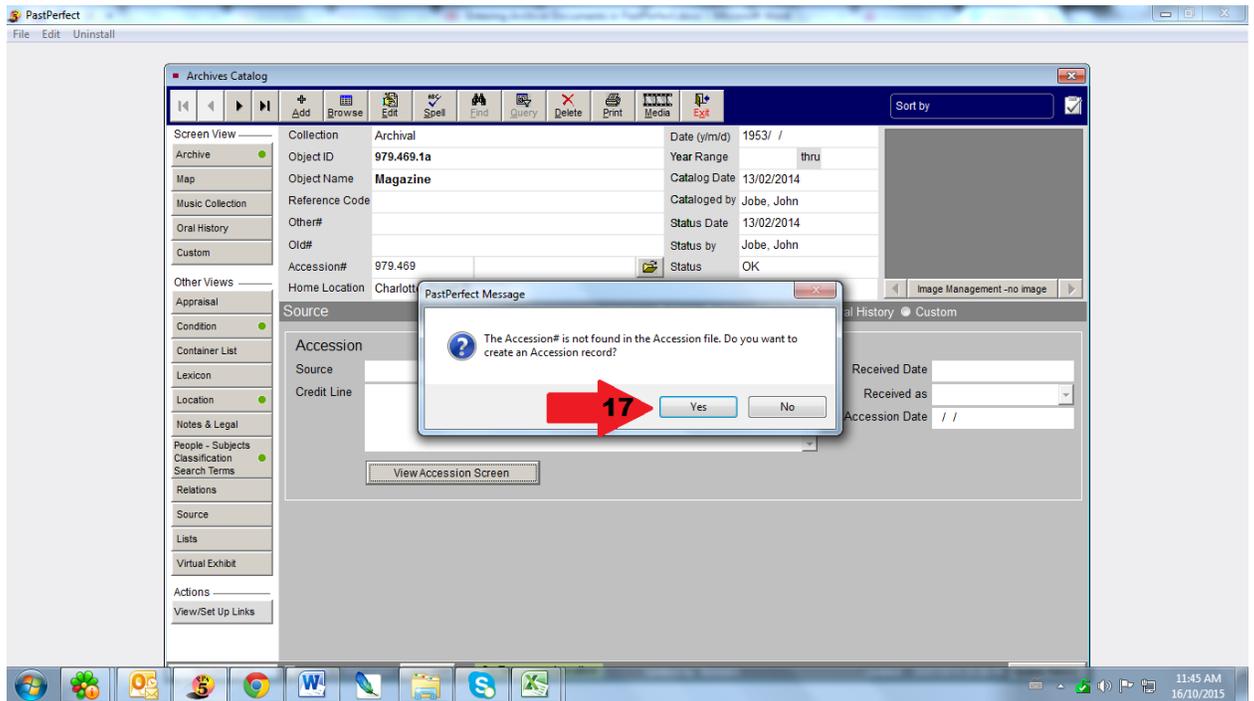
15. Navigate to the “Source” button located on the left-hand column under “Other views”.



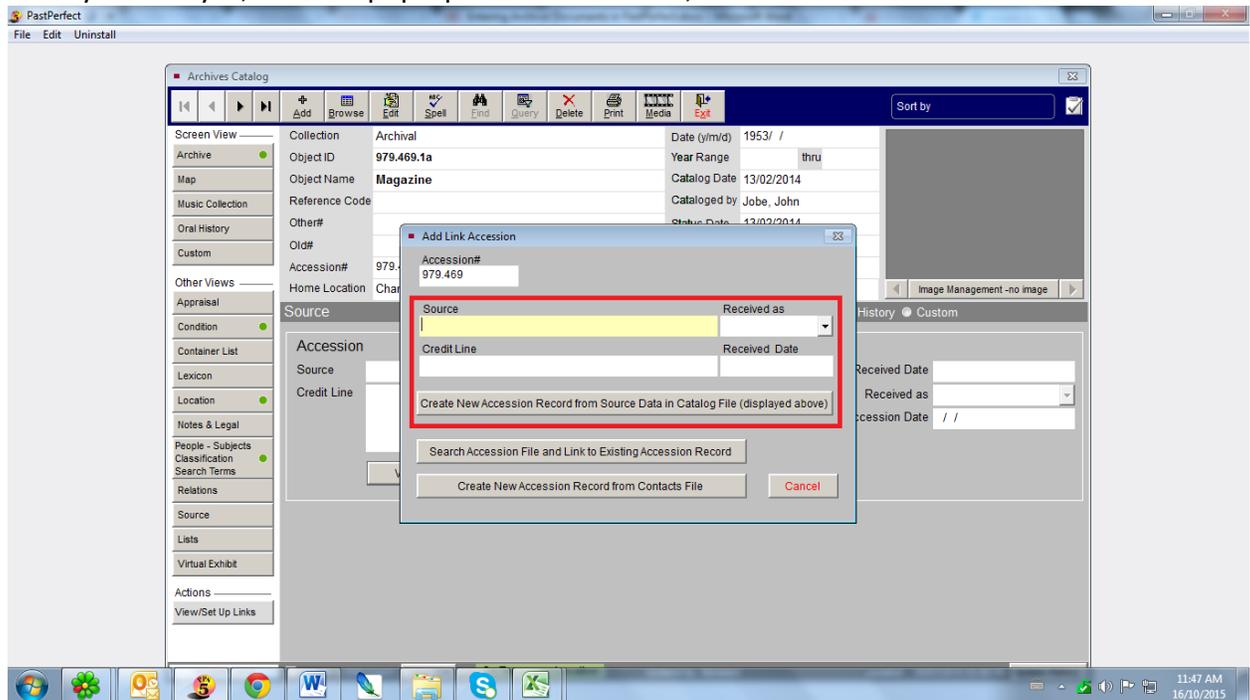
16. The term “Source” is another word for the person(s) who donated the document to the museum. Remember that if the accession number starts with an “X”, the document was found and therefore had no source. If you are entering a document based on a Master Card, the donor’s name and address will be noted on the card. Before adding a source, you will have to click the “View Accession Screen” Button below the toolbar again.



17. Once you click the button, a popup will appear saying “The accession number is not found in the accession file. Do you want to create an accession record?”. To this, you click “Yes”.



18. After you click yes, another pop-up window will load, as below:



- a. Source – In the Source field, enter the name of the individual. If the object is an “X” number, enter “Unknown”.
- b. Received as - In this field select an option from the list. Normally, this would be “Gift”. If the number is a “X” number, enter “Found in Collection”
- c. Received date – Enter the date received based on the Master Card or Accession Registry. If it is an “X” number, don’t enter date.

After completing this, click the “Create New Accession Record from Source Data in Catalogue File (displayed above)”

19. The Accession Screen will load as below:

The screenshot shows the 'Accession' screen in the PastPerfect software. The window title is 'PastPerfect' and the menu bar includes 'File', 'Edit', and 'Uninstall'. The main form is titled 'Accession' and contains the following fields:

Accession#	1995.22	Other#		Received as	Gift
Source	Mrs. Dayle Griffin			Received by	
Contact				Received Date	04/20/1995
Address	45 College Avenue			Accessioned by	
City, State, Zip	Orangeville	ON	L9W 3K8	Accession Date	/ /
Email, Country				Price or Value	Calculate
Home Phone	/ -	Fax	/ -	Dataset	
Work Phone	/ -	Cell/Pager	/ -	Contact ID#	
Website				TC Receipt#	
Credit Line					

Below the main form are sections for 'Instructions', 'Restrictions', 'Brief Description of Accession', and 'Notes'. The 'Actions' menu on the left includes options like 'Add New Catalog Records', 'Edit, Delete, or View Catalog Records', 'Add New Activity', 'Edit Activity', and 'Change Accession#'. The Windows taskbar at the bottom shows the time as 1:37 PM on 09/10/2015.

Click "Edit" to edit the entry. Fill out as much information that we have on the donor, such as their name, address, City, Provinces, and Postal Code. Also fill out the "Received as" and "Received Date" if it is known. Then click the save button.

20. Finally, Click the Red "X" at the top of the screen to get back to your Record. You have now completed the entry of an Archival Document.