How do I import data from Excel into PastPerfect?
Version 4.0

Please note that importing data from Excel is not a simple process. You will most likely need to do cleanup of your Excel file to make the data useable in PastPerfect before you import it.

PastPerfect Software offers Import Assistance, where we can import your data for you for a small fee. Please consider having us assist you if you feel this is a larger project than you want to attempt.

Instructions for Data Cleanup before Importing:
1. Be sure you are not duplicating Contact IDs or Object IDs.
    a. If you are importing into Contacts, you will need to have a column on your spreadsheet for ID numbers for the import to work. (See Special Notes for Importing into Contacts below for more information)
    b. You must have Object ID numbers if you are importing into Objects, Photos, Archives, or Library.
    c. You must have an Accession number if you are importing into Accessions.

2. You must have an Object Name for each item if you are importing into one of the catalogs – Objects, Photos, Archives, or Library. If you are not sure what to name the item, use "Unknown."

3. You can import into only one database at a time - Objects or Photos, etc. You may need to modify your data file so it is broken up into smaller files that contain records for just one database.

4. Make sure you do not have any hidden columns in your Excel file. Remove any columns that you are not importing. Blank or hidden columns will result in data going into the wrong fields.

5. You should not have the field names anywhere in Excel (column headers or Row1). Having this information in Excel will result in a record in PastPerfect with this information.

Special Notes for Importing into Contacts:
1. You cannot import membership information, donation payments, dues payments, in-kind gift payments, pledges, or volunteer hours. This data is stored in separate tables, not in the Contacts data table itself. If you would like to import this information, please contact PastPerfect Software for Import Assistance.

2. Make sure you have columns in your Excel document t that correspond to as many fields in PastPerfect as possible. You may need to add more fields to your Excel file and fill them in with the appropriate data from other fields.

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a. Example: Data should be imported into the "Name & Title" field - this is the field that is printed on labels and mailings. It should be formatted the way you want it on a mailing, such as "Mr. and Mrs. John Smith" or "Ms. Nancy Green".

b. You should also import data into at least one of the Dear fields ("Dear Formal" or "Dear Casual") since this gets printed on letters. "Dear Formal" should be formatted as "Mr. and Mrs. Smith" and "Dear Casual" should be "John and Jill."

c. Excel has a function called "Concatenate" that can be helpful with filling in information like this if you already have separate columns in your Excel file with the starting information. Refer to the Help section in Excel for instructions on how to use this function.

3. Phone numbers must be formatted as 123/456-7890. If you do not have an area code, you will need 3 spaces and a dash to hold the spots, "   /123-4567". If you have parentheses around the area code, such as (123)456-7890, remove them.

4. If you are importing into Contacts, you will need to have a column on your spreadsheet for ID numbers for the import to work, since this is the field that is unique to each record.

a. You can leave this column blank, and PastPerfect will assign the numbers after you import and reindex.

b. If you are assigning ID numbers to your contacts in this column, be sure you are not duplicating ID numbers already used in PastPerfect.

General Notes:

1. Make sure your Excel file is saved in the correct format.

a. If you are using Excel 2007 or 2010, you will need to save your data as a "Microsoft Excel 5.0/95 Workbook."

   i. Go to File | Save As.
   ii. Choose "Microsoft Excel 5.0/95 Workbook" from the "Save as type" drop-down menu.

b. You will also need to delete all the sheets in the workbook except for the one you are importing.

   i. Right-click on the "Sheet 2" at the bottom left corner of your Excel file.
   ii. Click "Delete."
   iii. Repeat until you only have the one sheet containing your data.
   iv. Save this file.

c. For older versions of Excel, you will need to save your file as a worksheet.

   i. Go to "Save As" at the top of your Excel file.
   ii. Choose "Microsoft Excel version 4.0 worksheet" as the "File Type".

Note: If your Excel file is not saved in the correct format, you will get an error saying "Invalid Field List" when you try to import.

2. When typing in the fields you are importing into, make sure you have the exact field names listed in the order they appear on your Excel file.

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    a. To find a list of field names, go to Main Menu | Reports | Field Descriptions, then double click on Field Descriptions report for the database in which you are working.

    b. The field name you want to type in is in the brackets at the end of the description. For example - the Accession Number says [accessno:c(15)], so the field name is "accessno". The rest of the information means it's a character field (c) and it has 15 characters.

    c. You will need to list the field names on the Import screen separated by commas, no spaces, and no carriage returns.

3. Make sure the name of the data file does not have any spaces in it. It should not be longer than 10 characters. Also, the make sure the name of the path to the data file is not long.

    a. Example: c:\My Documents\Historical Society\new files\library files to be imported.xls would be too long and contains spaces.

4. Once you import data, you do not want to import that same data again. PastPerfect will not merge records when importing the same records - it will just create duplicate records. If you need to start over, restore the backup you made before importing, and you will be back to where you were before importing.

5. You may also want to take a look at the section on Import and Export in the Utilities chapter of the User's Guide for more visual aids.

Basic Steps for Importing into PastPerfect from Excel:

1. Make a backup of your data to your hard drive by going to Main Menu | Backup | Backup Data to Hard Drive.

    a. **Make a backup even if you currently have no records in PastPerfect.** This backup will give you a point to restore back to if the import does not go as expected.

2. After you've made a hard drive backup, back up your data to a CD, DVD, or removable drive.

    a. If you are not able to back up, please do not proceed with the Import. Call our support office for assistance.

3. Go to Main Menu | Utilities | Import

4. On the Import screen, choose the type of file you are importing from (the Source) such as Excel 5.

5. Enter the location of your import file.

6. Choose the database you are importing into, such as Objects.

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7. Choose to import Selected Fields, and then type in your list of field names for the fields you are importing into, separated by commas, no spaces, and no carriage returns..

8. Click the Prepare Input button to begin the process

9. On the Pre-Import screen, select either "New Records", "Duplicate Records" (*not recommended*) or "Blank Object ID" (only recommended if you have blank Contact ID numbers). You can Browse the records to make sure the data is displaying in the correct fields.

10. When you are satisfied with the data to import, click Import Data Now. You will receive a message with the number of records that were imported.

11. Exit from the Import screen.

12. Click Reindex on the Main Menu.

13. Click Start Reindex Now to begin the Reindex.

14. Once this is finished, exit from the Reindex screen and check your records that you imported. Do not do any data entry in PastPerfect until you have reviewed the records and are sure they imported satisfactorily.

If you have any questions, please contact our Support Office at 1-800-562-6080 or email support@museumsoftware.com. Thank you for using PastPerfect!