PASTPERFECT SOFTWARE
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How do I move a record from one catalog to another within PastPerfect?

Version 4

Within the data entry process, there is the possibility that an item has been entered into the wrong catalog and needs to be transferred.

PastPerfect has a simple way to move a record from one catalog to another. However, every field is not common between the catalogs; therefore, information that is stored within a field that does not exist in the transfer catalog will not be moved. To prevent the information in these non-transferable fields from being lost, create a reference copy of the record. You can either print a paper copy of the record, or if you are using PastPerfect Version 4.0C8 or higher, you may save a copy of the record to Word or PDF by changing the output type from printer to Word or PDF when you use the print button. In addition to creating a second copy of the record outside of PastPerfect, please remember to create a backup of your data before using the Change Catalog function.

1. Create a Backup

   From the PastPerfect main menu, click "Backup." You may backup your data to the hard drive, to a removable drive, or to a CD/DVD.

2. Create a Reference Copy of the Record

   Go into the appropriate catalog and find the record you would like to change, so that it is visible on the screen. Click the "Print" button at the top of the screen. Each catalog has a slightly different Print Record screen – follow the applicable catalog instructions below.
   • **Objects**: When the Print Record screen appears, select "Complete" by clicking its radio button, so that it is filled. Then click the "Print" button immediately above "Exit" and choose your output option.
   • **Photos**: When the Print Record screen appears, click the "Print" button immediately above "Exit" and choose your output option.
   • **Archives**: When the Print Record screen appears, click on the appropriate Print Record type whether Archive, Map, Music Collection, or Oral History. If you have unique information for more than one archive type, within the same record, please remember to create a report for each. When the appropriate type is selected, click the "Print" button immediately above "Exit" and choose your output option.
   • **Library**: When the Print Record screen appears, click the "Print" button immediately above "Exit" and choose your output option.

3. Change the Catalog

   After creating a reference copy of the record you wish to move, make sure the record to be moved is still visible on the screen. Then, click the "Change Catalog" button at the bottom of the screen. Select the catalog where you wish to move the record and click OK. This will transfer the common fields, including the Object ID number, into a new record in the chosen catalog. It will also mark the record in the former catalog for deletion; it will be deleted the next time you Reindex. Please note: The Recall button should never be clicked on the old record, which has been marked for deletion. If the record is recalled from deletion, you will create a duplicate record within PastPerfect.

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4. Check Your Data / Add Non-Transferrable Information

Once you have changed the catalog, go to the new catalog. The transferred record should appear immediately on your screen. Using the reference copy that was created of the original record, edit the current record so that it contains the data that was not transferred. Please note: You will need to place the non-transferable information in a different field than indicated on the reference copy, since each catalog has several unique fields.

5. Reindex

The last step in this process is to Reindex your data. Exit out of the catalogs so that you are on the PastPerfect main menu. Click the "Reindex" button. If you are on a network, be sure that you are the only one in PastPerfect. Make sure all of the checkboxes are selected and then click "Start Reindex Now." Reindexing officially deletes the record from the original catalog. Please note: Before performing a Reindex, we generally recommend that you create a backup of your data to the hard drive.

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!