

PastPerfect Online User's Guide

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Introduction to PastPerfect Online

PastPerfect Online 2015

Originally released in 2005, PastPerfect Online enabled museums of all sizes to promote public access to their collections using a sophisticated web based search tool. Over the years, new features were added to include search statistic reports, Google indexing via sitemaps and more. The product was revamped in 2014 and is actively being enhanced with new features and a completely modern look.

This online documentation is designed to help you make the most of your PastPerfect Online site. If you have any difficulty finding the information you need, please contact our [support team](#). We want you and your new site to be a complete success.

Thanks for choosing PastPerfect and PastPerfect Online!

Using This Guide

This guide is set up in a Concept/Task/Resource format allowing users to consume the information in a variety of ways. Simply click the "Next" arrow at the top of the page to access every topic in the guide, ordered by subject matter. Use of the Index and the Search features will allow you to access the information you select. The Glossary provides definitions for some commonly misunderstood words, acronyms, and expressions.

As always, we appreciate your feedback. If you feel that there are topics that are missing, please submit your feedback to feedback@museumssoftware.com.

Basic Steps for Creating Your PastPerfect Online Website

1. [Install PastPerfect Online](#)
2. [Select catalog records to include online](#)
3. [Step through the Web Publishing Wizard to create and upload your records](#)
4. [Modify your website in the Interface Management Site \(IMS\)](#)
5. [Share your site with others!](#)

Linking to Your PastPerfect Online Site

Concept

Linking your organization's website to your new PastPerfect Online site is a great way to encourage web visitors to explore the collection. You'll need access to the content on your website in order to add a link. This can be a simple text link or custom stylized button or image. Below are the basic formats for creating a link with text and a link with an image.

- To create a link using text use the format below. Replace the italicized section with your PPO Site Address as listed on your Welcome Letter and the bold section with what you want your link to say.
`Explore our Collections`
- To create a link using an image use the format below. Replace the italicized section with your PPO Site Address as listed on your Welcome Letter, the underlined section with your image file location, and the bold section with what you want your image's alternate text to say.
` `

If you do not have a working knowledge of HTML and CSS, we suggest you speak with your organization's website manager about adding this link to your homepage.

References

- [HTML Basics](#)

Contact Us

PastPerfect Online hosting includes assistance with setting up and maintaining your PastPerfect Online site. Please don't hesitate to contact us if you have questions. Our office is open Monday-Friday from 9:00-5:30 ET; we're very happy to help!

- Reach us toll free at 1-800-562-6080
- Email us at pposupport@museumsoftware.com
- Visit our website's [Support Page](#)
- Review [PastPerfect Online FAQs](#)

Installation

Understanding Your Welcome Letter

Concept

Your PastPerfect Online Welcome Letter has all the information you need to log into the Interface Management Site (IMS) and begin customizing your PastPerfect Online website. Please keep your letter in a safe place where you can refer to it as needed.

The top of your letter contains your hosting start date, renewal date, and record limit. It also lists the email and phone number for the main PastPerfect Online user at your organization. This email will be used to send you notifications about your site.

The bottom portion of your letter has a grid with important URLs, emails, and passwords. The information in this grid is the key to accessing your PastPerfect Online site.

- **PPO Site Address:** The landing page URL for your PastPerfect Online site.
- **Keycode:** A seven digit number specific to your organization used during installation.
- **Client Number:** PastPerfect assigned five digit number displayed during file creation.
- **IMS Address:** Webpage for customizing your PastPerfect Online site.
- **Museum Manager Email:** Email address for logging into IMS.
- **Password:** Password for logging into IMS.
- **Statistics Report:** URL used to access your site's search statistics.
- **PPO User Guide:** URL for the PastPerfect Online User Guide.

References

- [Checking System Requirements for PastPerfect Online](#)
- [Installing PastPerfect Online](#)
- [Accessing Your Interface Management Site \(IMS\)](#)

Checking System Requirements for PastPerfect Online

Concept

In order to use PastPerfect Online you need to be using PastPerfect Version 5.0D5 or higher and have purchased and unlocked the MultiMedia upgrade. If you are not using Version 5.0D5 or higher you can update your program for free from www.museumsoftware.com. Instructions for running the update can be found in the References section at the end of this topic. If you need assistance with the update, we're happy to help.

Task

1. Open PastPerfect.
2. From the Main Menu click on **Utilities**.
3. Select **System Information**, then locate the **Program Version** and **Data Version**.
4. If your Program Version and Data Version say anything lower than 5.0D5 you will need to update your program.
5. In the top center of the screen locate the **Installed Add-ons** menu.
6. A red check next to MultiMedia means the upgrade has been unlocked. A "No" next to MultiMedia indicates that the upgrade has not been unlocked and you need to contact [PastPerfect Support](#) for assistance.

PastPerfect Information

PastPerfect Program

Program Version	5.0D5
Data Version	5.0D5
Program Installed Version	5.0D4
Data Installed Version	5.0D4
Record Limit	None
Collection Records	117

Installed Add-ons

MultiMedia	<input checked="" type="checkbox"/>
Network Version	<input checked="" type="checkbox"/>
Barcode Printing	No
PastPerfect-Online	No
Virtual Exhibit	No
Inventory Manager	No

Imaging

Current Image Folder	001
Images in Current Folder	238
MB in Current Folder	77
Image Attachments - Catalogs	237
Image Attachments - Other	70
Multimedia Links	20

Records

Objects	32
Photos	42
Archives	25
Library	18
Accession	31
Contacts	43

Computer Information

OS Name	Windows 7
Version	6.1.7601 Service Pack 1 Build 7601
Computer Name	SARA-PC
User Name	Sara
Program Folder	c:\pp5\
Data Folder	c:\pp5\data\

Computer Hardware

Physical Memory	4044 MB
Memory Available to PastPerfect	128 MB
Program Drive Space(C:)	453.1 GB
Data Drive Space(C:)	452.6 GB
Display Size	1440 x 900

Users in Program Now

Computer	User	Logged in
SARA-PC - Sara	Unknown	10/28/2014 10:16 AM

Buttons: Display Data Table Information, Download Latest Update, Print or View Update Notes, Information at Last Backup, Error Log, FTP, View, Print, Clear, User History, Exit

References

- Video Tech Tip: [Running an Update for your PastPerfect Program](#)
- Knowledge Base Article: [How do I get a free update for my PastPerfect 5.0 Program](#)
- PastPerfect Software Download Page: [Software Updates](#)

Installing PastPerfect Online

Concept

All organizations, whether you are new to PastPerfect Online or have used one of our previous versions, need to follow this installation procedure. Following this procedure on one workstation will automatically enable the PastPerfect Online upgrade on all workstations.

Task

1. Check to make sure that your PastPerfect program meets the [system requirements](#) for PastPerfect Online.
2. Insert the PastPerfect Online Upgrade CD into your computer.
3. From the Main Menu of PastPerfect click on **Setup** and select **System Parameters**.
4. Click **Activate New Features**.

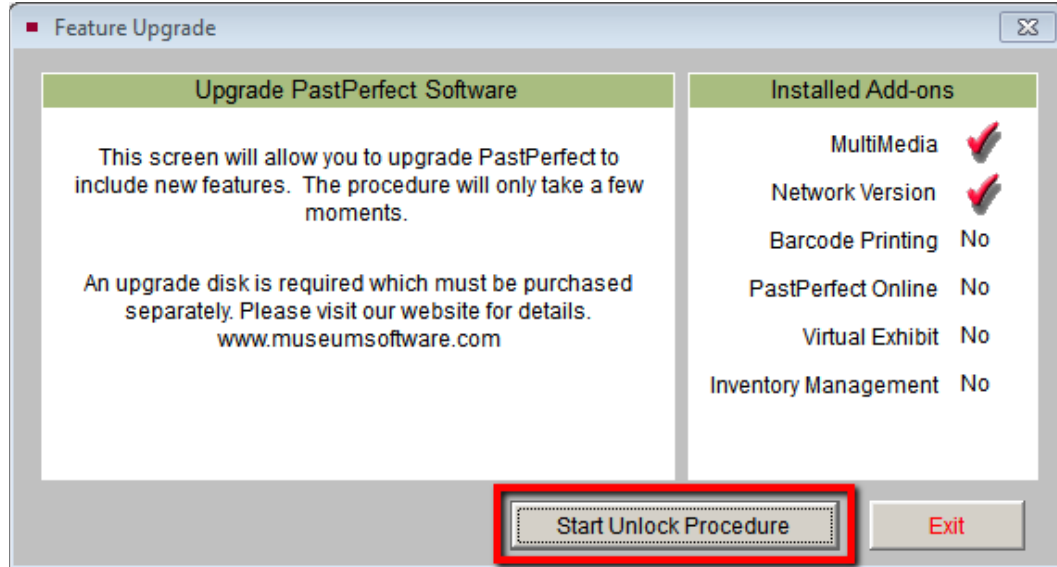
The screenshot shows the 'Setup System Wide Parameters' dialog box with the following sections:

- Country Settings:** Country: USA, Date Style: American, View button.
- Accession & Sites Screens:** Maximum # of Catalog Records to Display for One Accession or Site: 999. Note: To increase speed, Accessions or Sites with a very large number of associated catalog records will not display the list of catalog records.
- Object ID Sort by:** Alpha, Numeric (selected), Object ID Separator: .
- Catalog Record Date Display:** Catalog Record Date Format: YYYY/MM/DD (checkbox).
- Catalog Research - Query:** Save query in query history file even if there were no matching records found. (checkbox checked).
- Lexicon Nomenclature:** Use Nomenclature Version: 3.0.
- Web Links:** Art & Architecture Thesaurus (AAT) Website: http://www.getty.edu/research/conducting_research/vocabularies/aat/; Union List of Artist Names (ULAN) Website: http://www.getty.edu/research/conducting_research/vocabularies/ulan/; Library of Congress Online Catalog Website: http://catalog.loc.gov/.

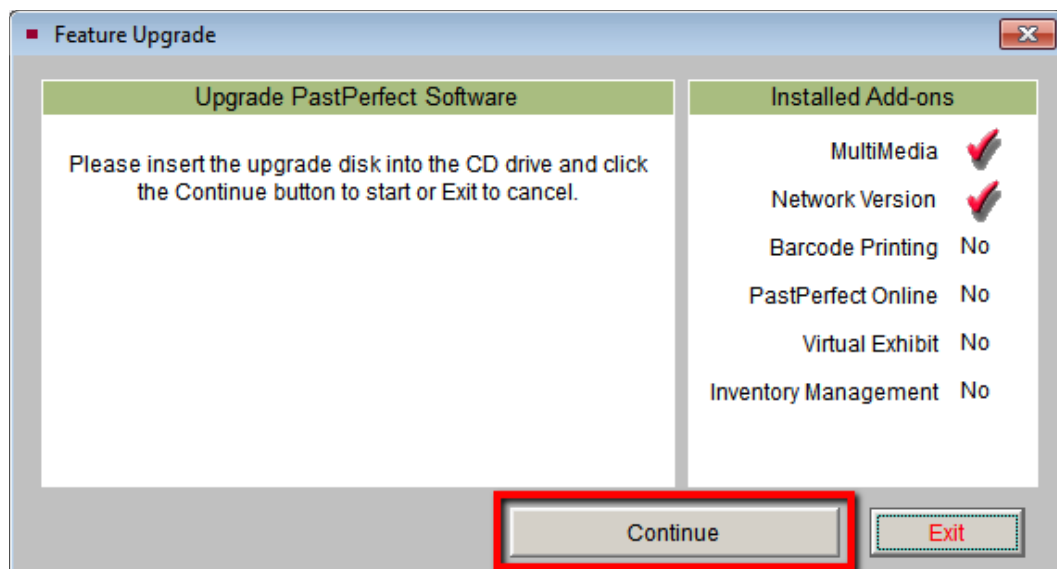
Note: These Web links are available on the catalog screens.

Buttons: **Activate New Features** (highlighted with a red box), Exit.

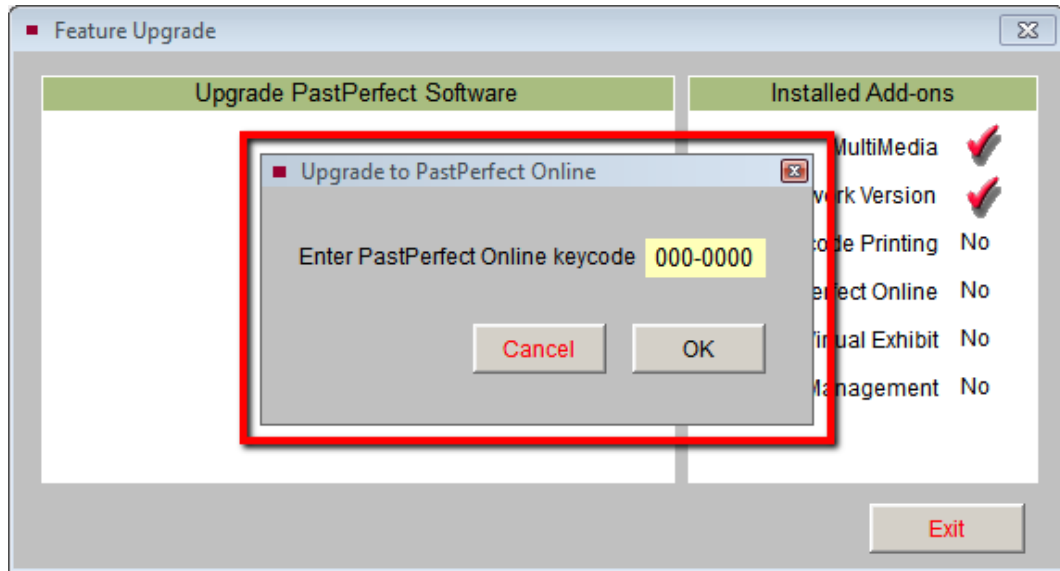
5. Click **Start Unlock Procedure**.



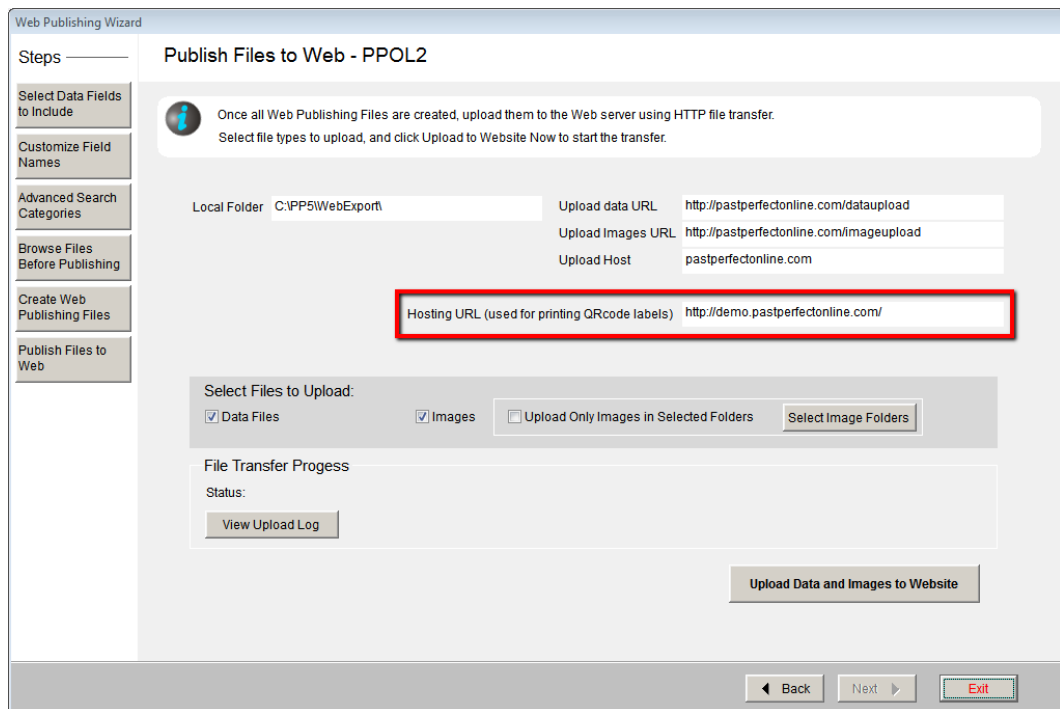
6. A message will appear asking you to insert the upgrade disc into the CD drive, please make sure the CD is in place and then click **Continue**.



7. Enter your seven digit Keycode and then click **OK**. This Keycode is located on your Welcome Letter as well as on the envelope for your PastPerfect Online installation CD.



8. You will receive a message saying the installation is complete, click **Exit** to return to the Main Menu.
9. From the Main Menu of PastPerfect click **PastPerfect Online**.
10. Go to the final step of the Web Publishing Wizard by clicking the **Publish Files to Web** button.
11. Fill in the **Hosting URL** field with the PPO Site Address located on your Welcome Letter. Ensure that the Hosting URL ends with a / .



References

- [Checking System Requirements for PastPerfect Online](#)
- [Understanding Your Welcome Letter](#)

About Your Site

Your PastPerfect Online Site's Landing Page

Concept

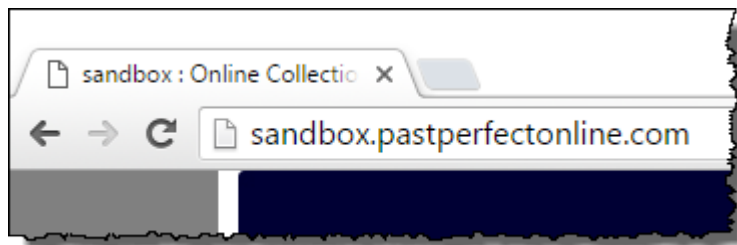
When visitors come to your PastPerfect Online site they will be greeted with various ways to explore your collection. They can use the keyword and advanced searching options to be taken directly to the records that meet their search criteria. If visitors prefer to simply look through collections to see what sparks their interest, they can discover collection records with random images or by browsing through the catalogs.

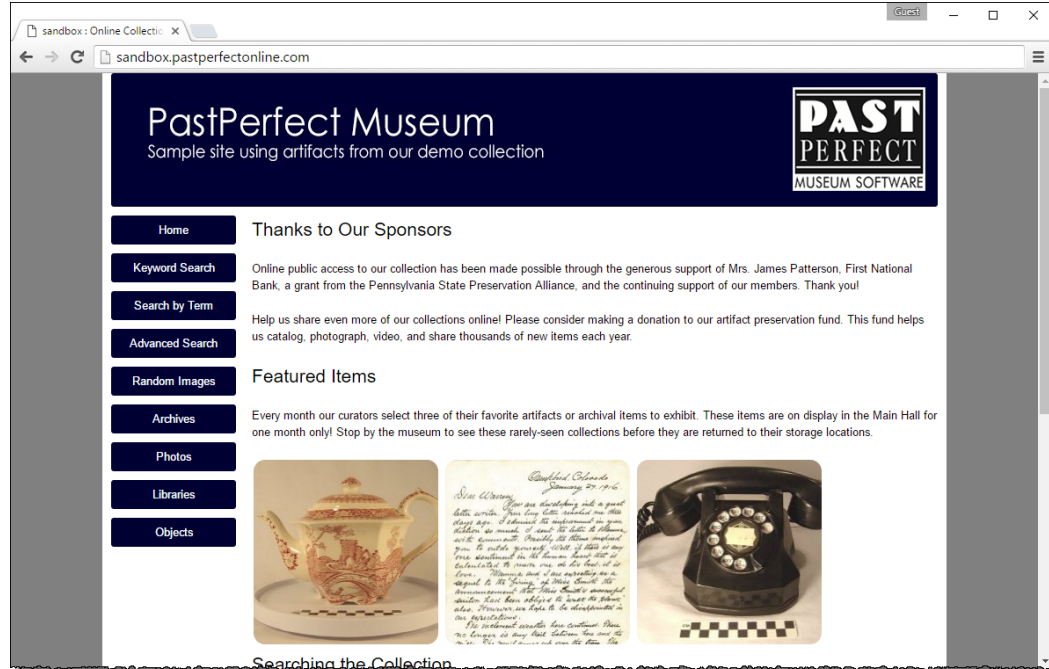
Your PastPerfect Online site can be customized to match your existing homepage. You can change colors, fonts, backgrounds, images, text alignment, and much more. The Advanced Style and Customization section of this User Guide will explain how to make these modifications.

Task

Getting to your Site

1. Open your preferred internet browser.
2. Locate the address bar at the top of the screen.
3. Erase what is currently in the address bar.
4. Type in the PPO Site Address from your Welcome Letter.



5. Press the **Enter** key on your keyboard.

6. Use the navigation buttons to explore the different ways to search the collection.
- **Keyword Search** allows you to find items related to a specific word or phrase.
 - **Search by Term** provides alphabetical listings of names and terms to pick from to perform a search.
 - **Advanced Search** gives you the ability to narrow down your search by multiple criteria.
 - **Random Images** shows you images of catalog records, allowing you to quickly browse through items.
 - The catalog record buttons (**Archives, Photos, Libraries, and Objects**) let you browse items specific to each catalog.

References

- [Getting the Most from Keyword Searching](#)
- [Using Search by Term](#)
- [Digging Deeper with Advanced Search](#)
- [Using Random Images to Browse the Collection](#)
- [Searching by Catalog](#)
- [Interface Management Site - Customizing Your Landing Page](#)

Getting the Most from Keyword Searching

Concept

Visitors to your site have many ways to search your collection. The option they are likely most familiar with is Keyword Search. Using the Keyword Search function allows visitors to search for words, phrases, or sets of words using AND / OR connectors. Keyword Search checks the data in any field that is mapped to an Advanced Search category and returns the appropriate results.

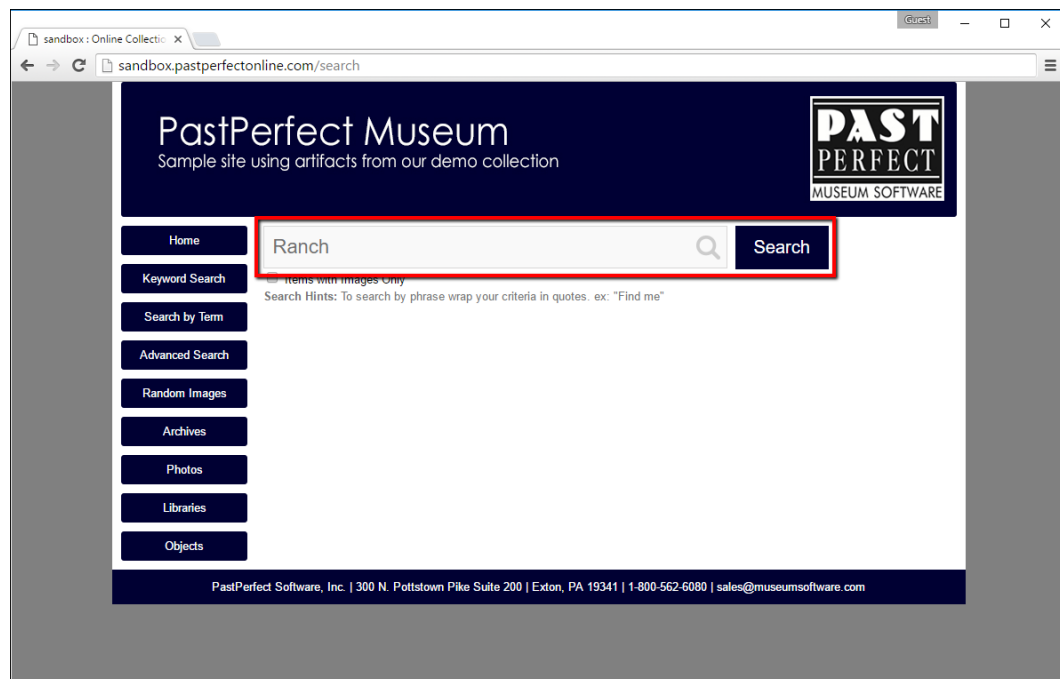
Keyword Search is not case sensitive. Search results can be accessed by clicking the image or hyperlink for the record. The hyperlink for each item your search returns is comprised of the first two fields you have selected for that record type in the Web Publishing Wizard.

You can limit your search to only return results that have an image. Put a check in the "Items with Images Only" option below the Keyword Search field to limit your results.

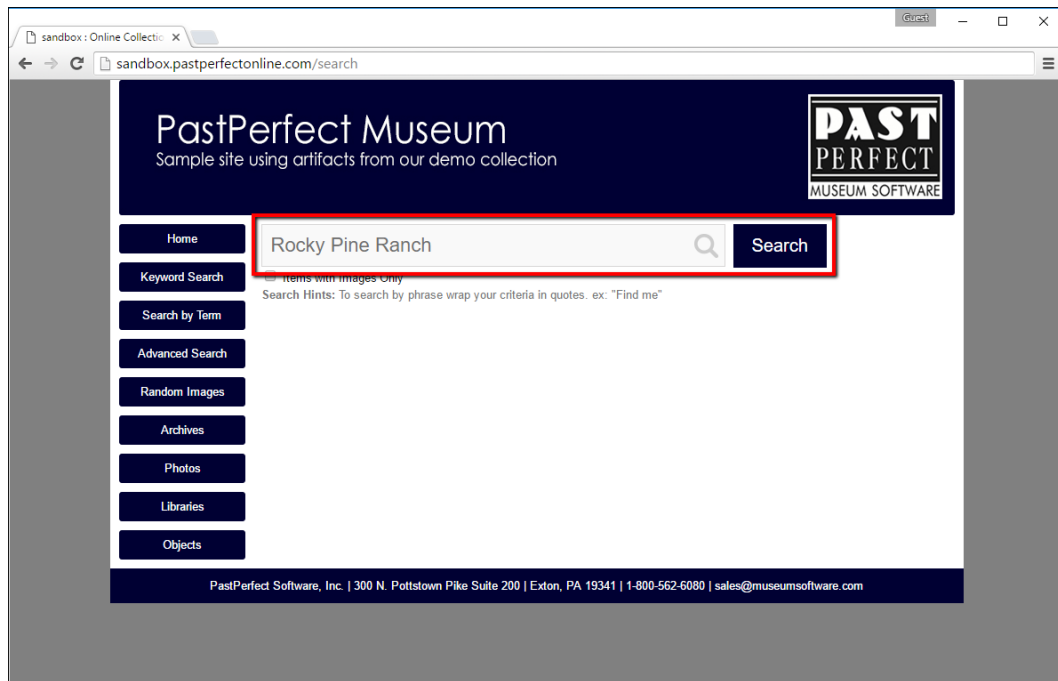
Task

Searching for a Single Word or Words

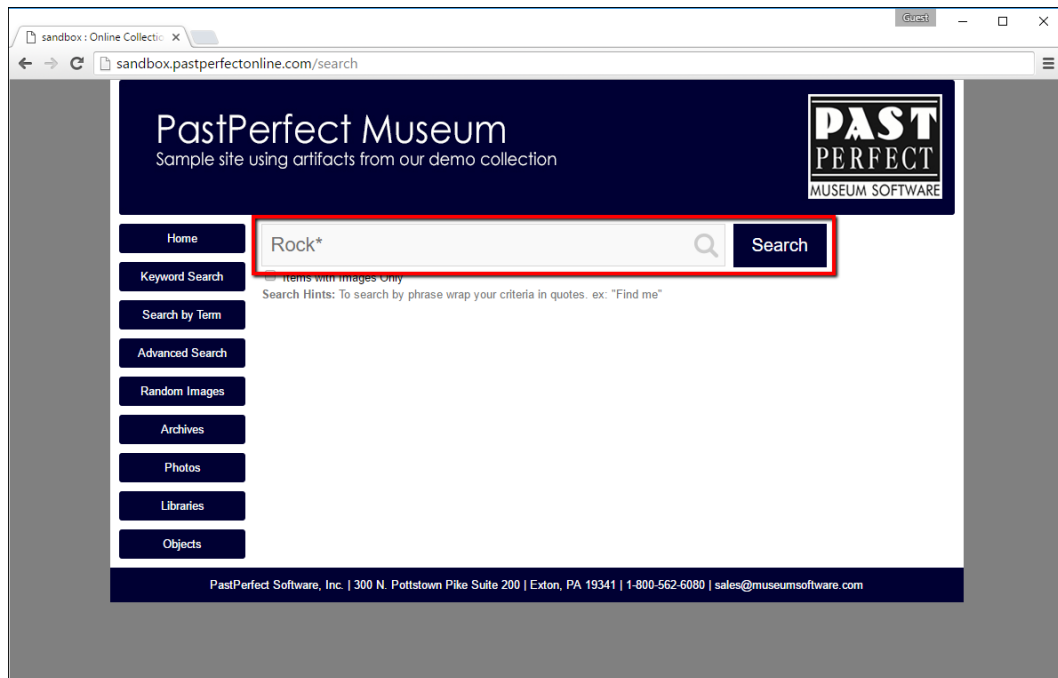
1. Type the word or words you want to find, then click **Search**.



2. Search for multiple words by separating them with a single space. Searching for **Rocky Pine Ranch** will return records that contain Rocky or Pine or Ranch or any combination of the three.

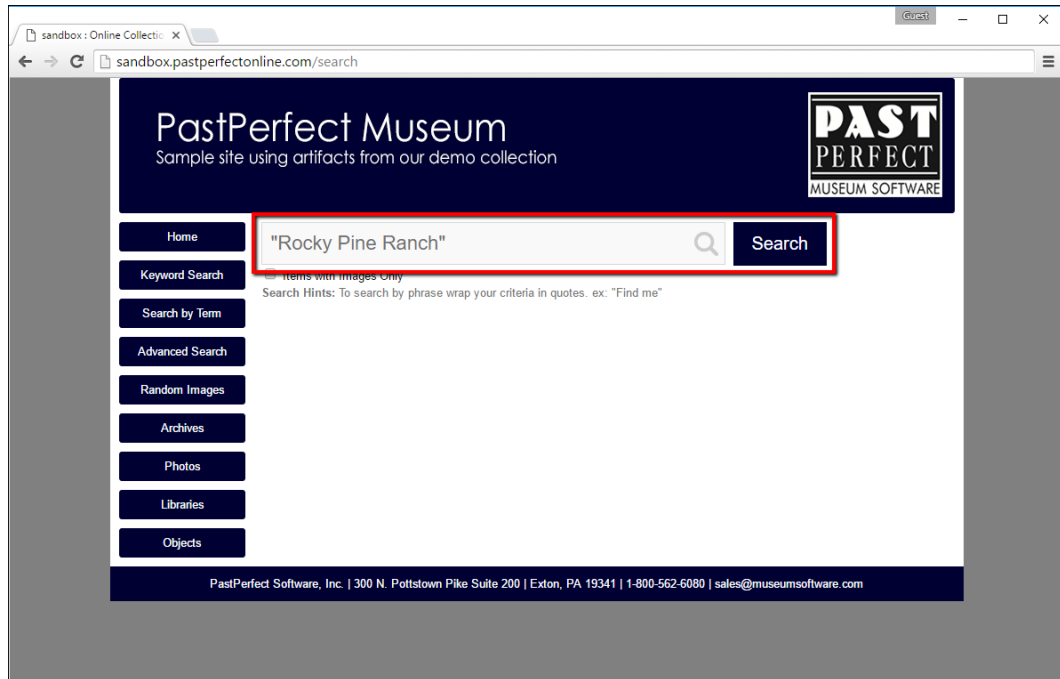


3. Use an asterisk (*) as a wildcard when searching for single words. Enter **Rock*** as your search to find all records containing words that begin with rock, like Rocky and Rockingham.



Searching for a Phrase

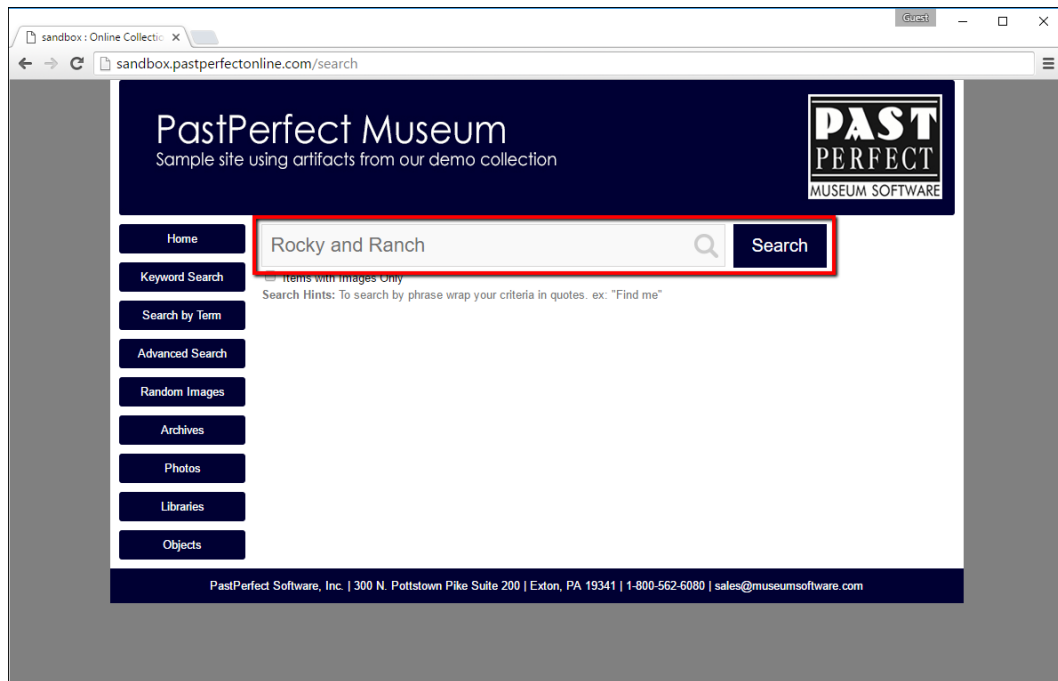
1. Type the phrase you want to find inside of quotes, then click **Search**. Words inside of quotes must exist in the same order for the records to be returned. As an example, "**Rocky Pine Ranch**" and "**Pine Ranch Rocky**" will return very different results.



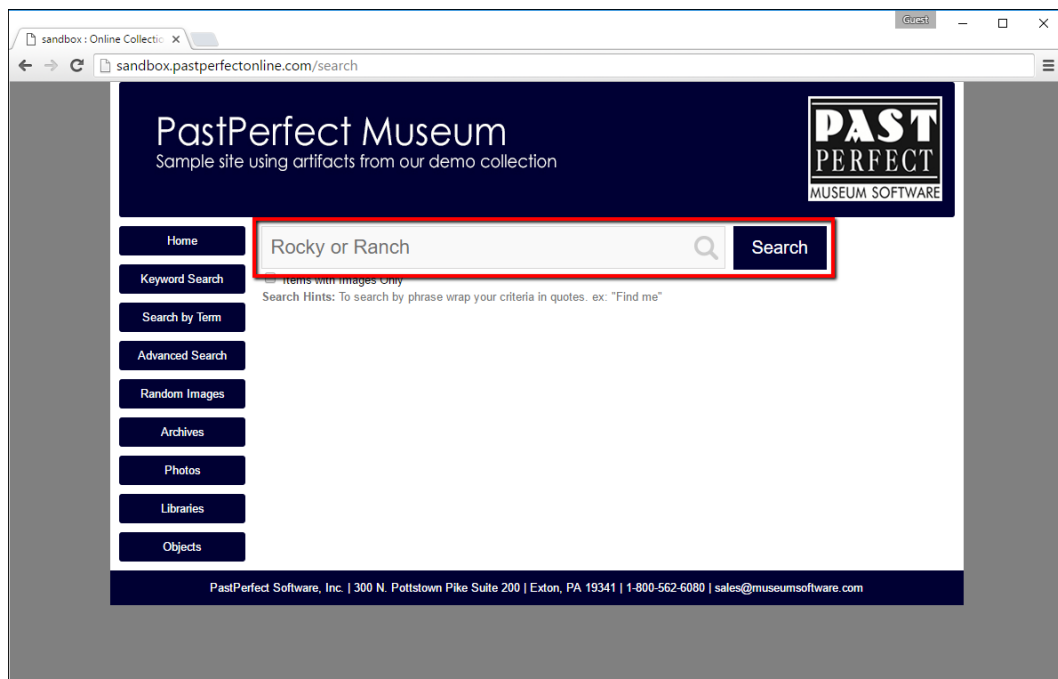
Searching with AND / OR Connectors

Using AND / OR connections between words allows you to limit or expand your search criteria. Using AND will return results that contain all words in your search. Using OR will return results that contain at least one of the words in your search.

1. In the search field enter your search criteria. Searching for **Rocky and Ranch** will return results that have both terms in its fields. The terms do not need to be in the same field to be included in the search results.



2. Searching for **Rocky or Ranch** will return results that have either term in its fields.



3. You can combine these connectors for more specific results by using parenthesis in your search string. As an example, **rock OR (pine AND ranch)** will return different results than **(rock OR pine) AND ranch**.

References

- Exploring Search Results
- [Digging Deeper with Advanced Search](#)

Digging Deeper with Advanced Search

Concept

Advanced Search is based on categories that consist of fields containing similar content. With a traditional keyword search, the term "china" will return records related to the country as well as the material. Creating an "Artifact Composition" category, then mapping fields such as material, medium, and rock type will allow for more specific searching. Searching within the "Artifact Composition" category will only display items that have "china" in their mapped fields. The search categories and field mapping can be customized using the Web Publishing Wizard in your PastPerfect Software.

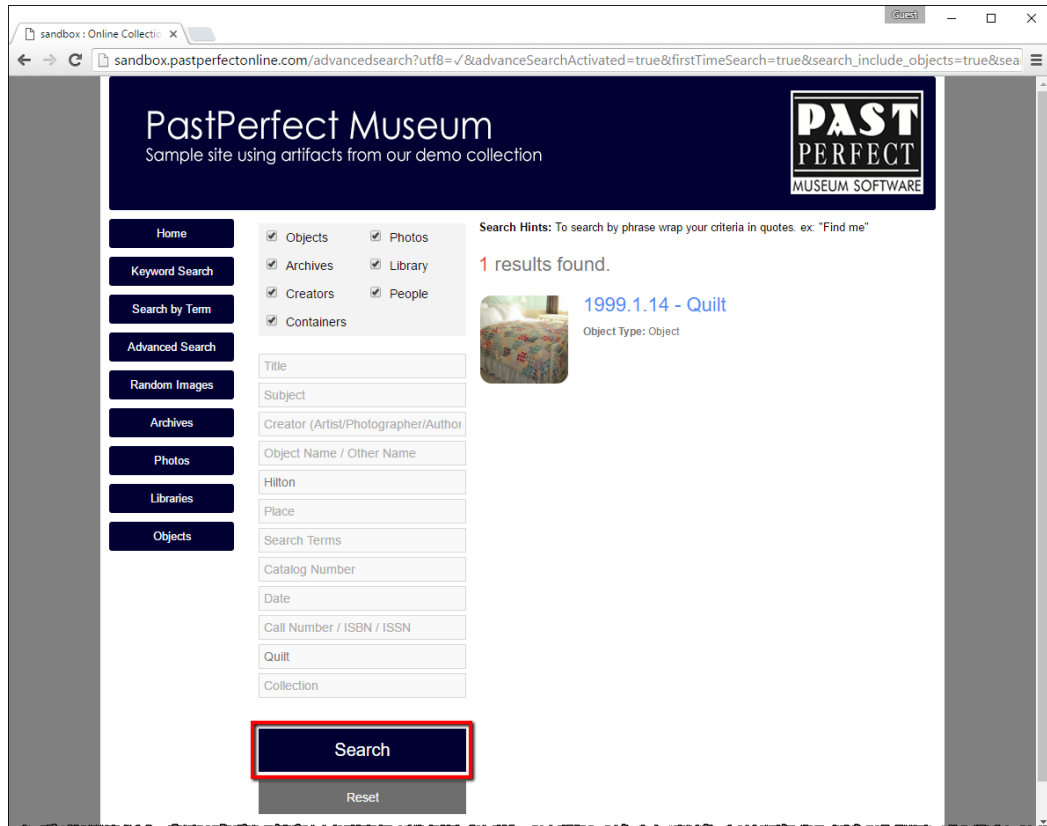
Just like in Keyword Search, Advanced Search is not case sensitive and will only search fields that are mapped to an advanced search category.

Task

1. Click the **Advanced Search** button on your PastPerfect Online site.
2. At the top of the screen, select or deselect the data tables you want to search.
3. Search for **Hilton** in the **People** field and **Quilt** in the **Description** field to retrieve only the records that fit both of these criteria.

The screenshot shows the PastPerfect Museum Advanced Search interface. The page title is "PastPerfect Museum" with the subtitle "Sample site using artifacts from our demo collection". The logo for "PAST PERFECT MUSEUM SOFTWARE" is in the top right. The navigation menu on the left includes buttons for Home, Keyword Search, Search by Term, Advanced Search, Random Images, Archives, Photos, Libraries, and Objects. The main content area has a search form with the following fields: Title, Subject, Creator (Artist/Photographer/Author), Object Name / Other Name (containing "Hilton"), Place, Search Terms, Catalog Number, Date, Call Number / ISBN / ISSN, and Collection. The "Object Name / Other Name" and "Collection" fields are highlighted with red boxes. The "People" checkbox is checked in the top right, and "Search Hints: To search by phrase wrap your criteria in quotes. ex. 'Find me'" is displayed. A "Search" button and a "Reset" button are at the bottom.

4. Click **Search Records** to see a list of records that match your search criteria. The link for each item your search returns is comprised of the first two fields you have selected for that record type in the Web Publishing Wizard.



5. Click on the image or hyperlink to view the full record.

References

- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- Exploring Search Results

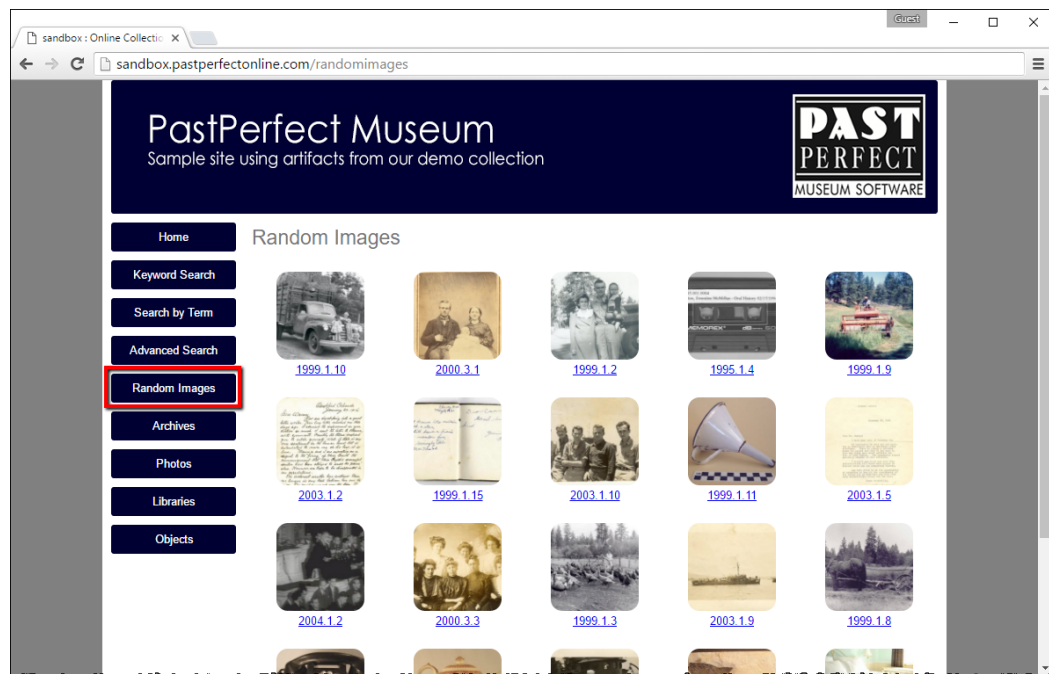
Using Random Images to Browse the Collection

Concept

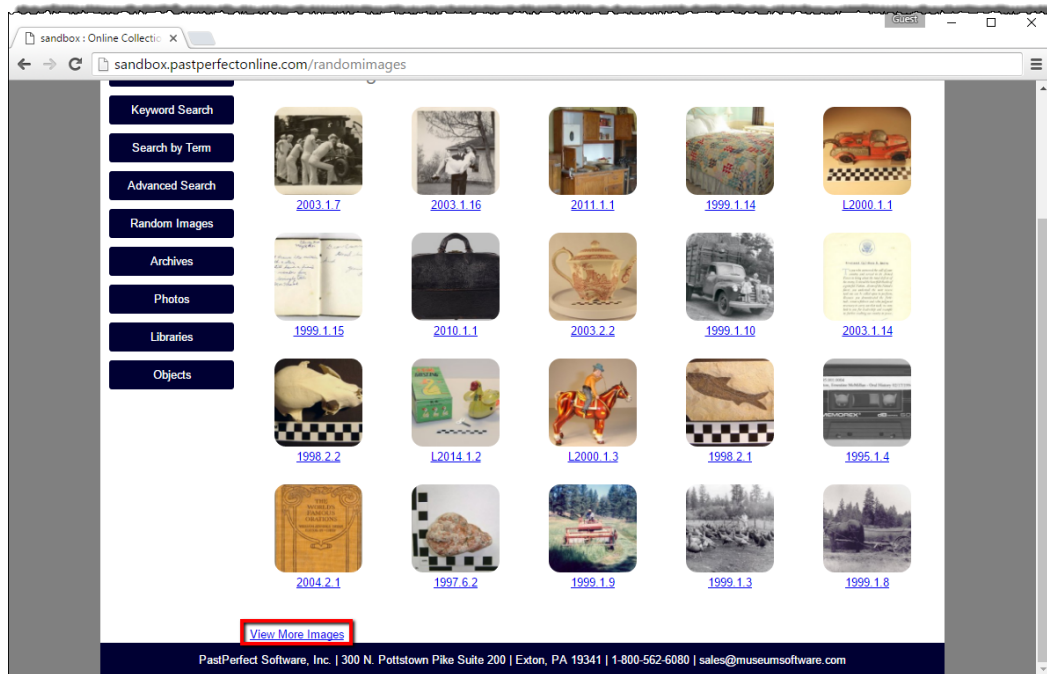
The Random Images area of your PastPerfect Online site allows visitors to explore your collection even if they don't have a specific search criteria in mind. By default, Random Images includes the first image attached to your catalog records from all four catalogs. The catalogs included in Random Images can be customized using your Interface Management Site.

Task

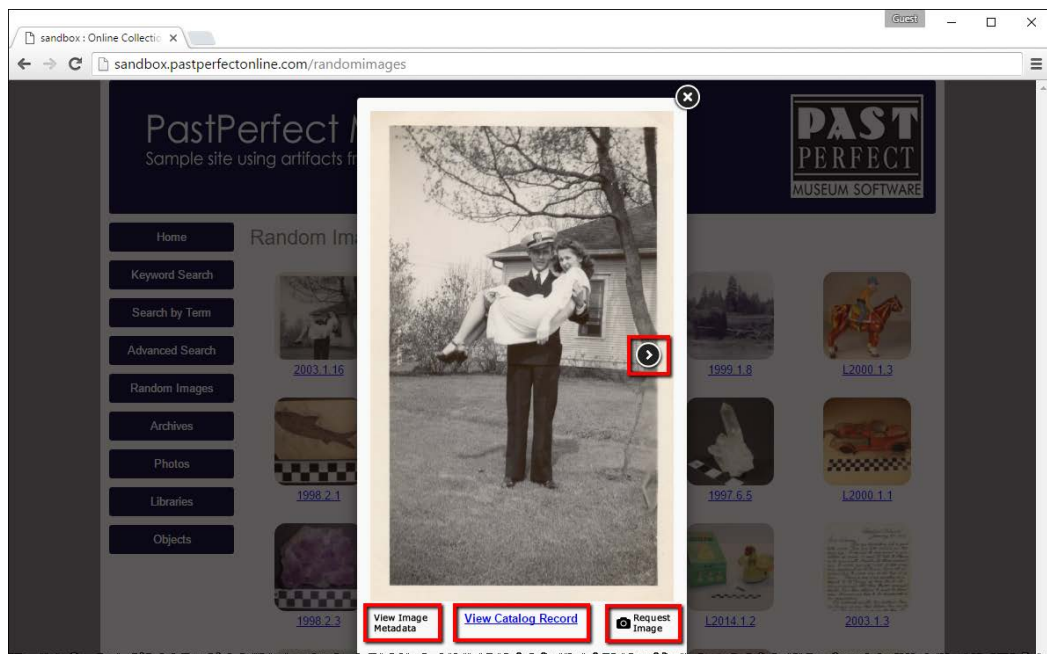
1. Click on the **Random Images** button. A selection of images from the collection will be displayed on the screen.



2. A new set of images can be seen by clicking the **Random Images** button again or clicking the **View More Images** button at the bottom of the screen.



3. Click on an image to view a larger copy.
4. Use the next and prior **Arrow Buttons** to move through the Random Image results.
5. From the image lightbox, you can click **View Image Metadata** to be taken to the image's metadata information, click **Request Image** to open the Image Request form, or click the link at the bottom of the image to be taken to the item's full record.



References

- [Interface Management Site - Random Images Tab](#)

Searching by Catalog

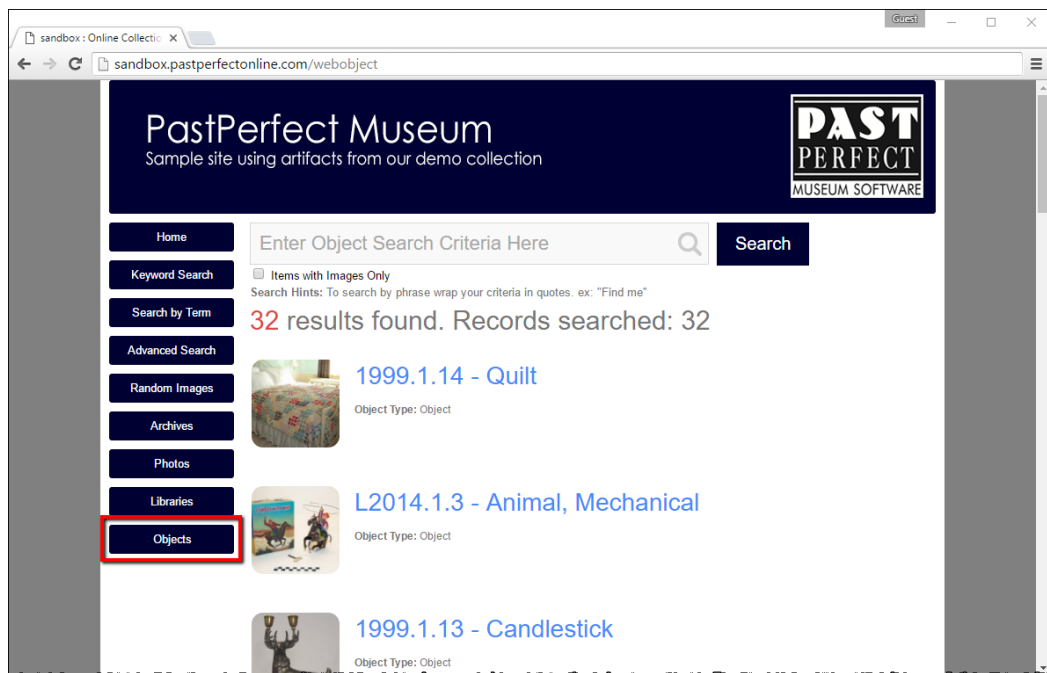
Concept

Selecting one of the catalog buttons on your PastPerfect Online site will display random items in the chosen catalog. Visitors can browse through these items or do a Keyword Search to narrow the list of results. Phrase searching, wildcards (*), using AND / OR statements, and limiting the search results to items with images only are available when searching by catalog as they were explained in the [Keyword Search topic](#).

This section will discuss the Objects search area of your PastPerfect Online site; the other catalog areas, Archives, Photos, and Libraries, function the same way.

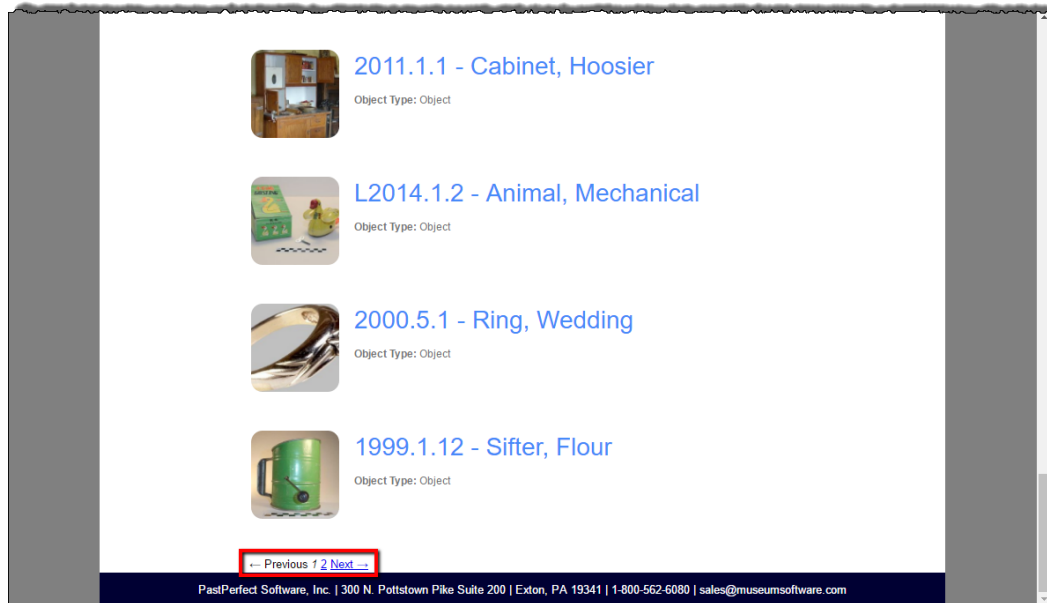
Task

1. Click on the **Objects** button. A list of object records will be displayed. The link for each item is comprised of the first two fields you have selected for that record type in the Web Publishing Wizard.



2. Use the **Search** field at the top of the screen to search these records as you would from the Keyword Search area of the site.

3. Scroll through the records using the **Next** button at the bottom of the page.



4. Click on the item's image or hyperlink to view the full record.

References

- [Getting the Most from Keyword Searching](#)
- [Interface Management Site - Site Tab](#)
- Exploring Search Results

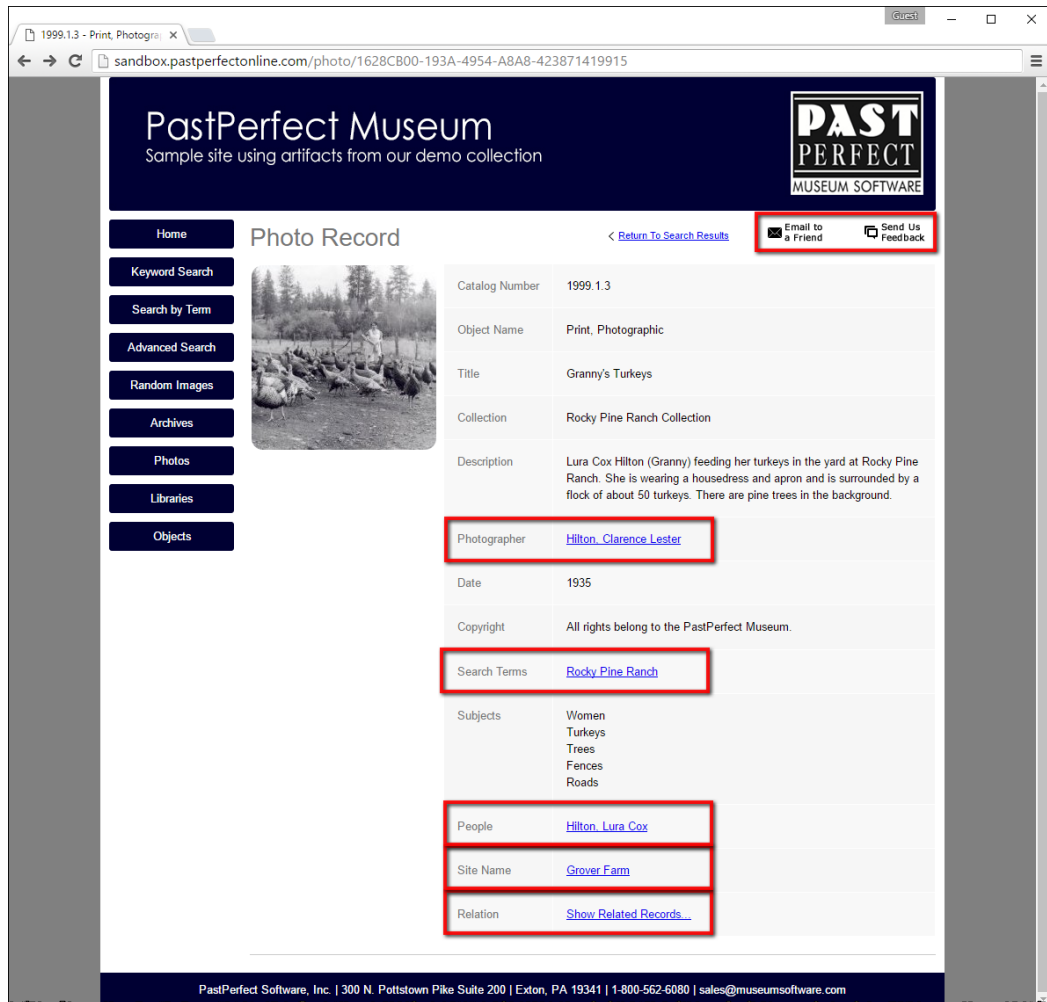
Exploring a Catalog Record

Concept

There are two main parts to the catalog records: The images section displays thumbnails from the catalog record. The data section is presented as a table to the right of the images with data fields pulled from your internal database. Additionally, at the top right, a series of buttons allows users to communicate with each other and the organization using email forms. These email forms are customizable through IMS.

When viewing a catalog record, visitors have various options for interacting with your collection:

- **Email to a Friend:** Selecting this button allows visitors to easily email a direct link for a catalog record to a friend.
- **Send Feedback:** If a visitor has information about the record they are viewing they can contact the museum using this button.
- **Creator (Artist/Photographer/Author):** Click on a name to see more information about the creator and all of their associated records.
- **People:** Click on a name to see more information about the person and all of their associated records.
- **Search Terms:** Click on a search term to see more information and the records associated with this term.
- **Site Name:** Click on a site name to see more information about the site and the records associated with this site.
- **Relation:** Click the link to see a list of the catalog records related to this item.
- **Containers (Archives only):** Click on a link to view the associated container list record.
- **Parent Object ID/Child Records (Archives only):** Click on an Object ID to view the parent record or the child records of this item.



References

- [Web Publishing Wizard - Selecting Data Fields](#)
- [Interface Management Site - Enabling and Customizing the Feedback Form](#)
- [Interface Management Site - Enabling and Customizing the Email A Friend Form](#)
- Introduction to Sharing Additional Record Types

Email to a Friend Button

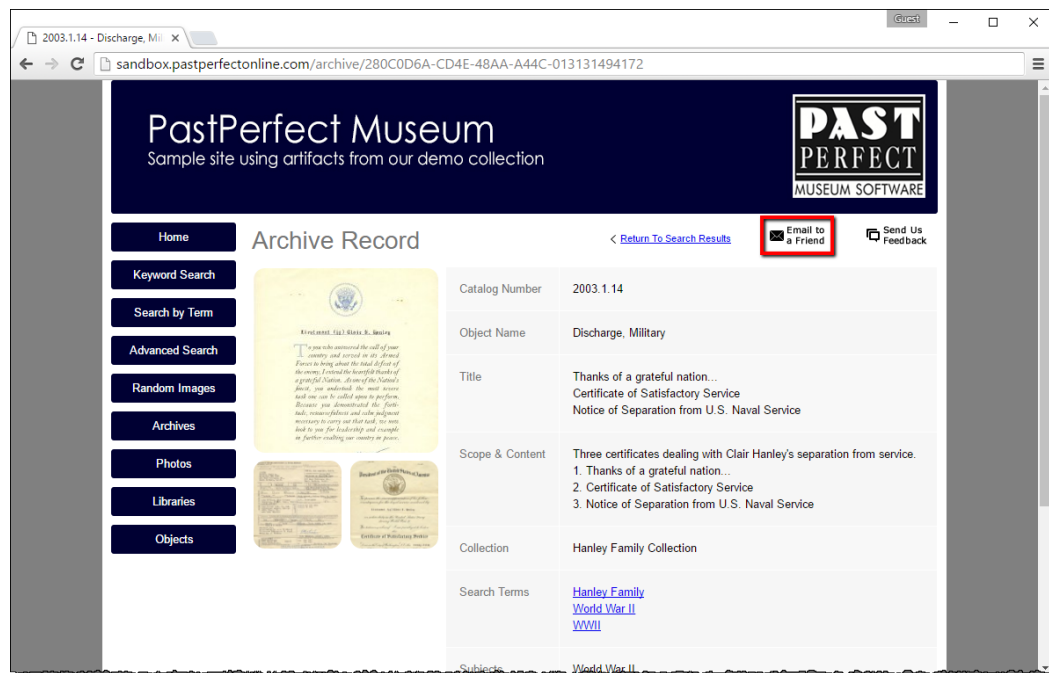
Concept

The Email to a Friend button allows online visitors to easily share a particular record with others. The visitor on your site can share the record along with a personalized message. This information is emailed so the recipient can view that specific record as well as explore the rest of your site. This is a great way of having users help promote your site.

By default, the Email to a Friend button is displayed in the upper right corner of each catalog record page and can be suppressed at the Interface Management Site.

Task

1. Locate an item you wish to share.
2. Click the **Email to a Friend** button.



3. A new window will open displaying the Email Form. Fill out the form making note that the required fields are denoted with an asterisk (*).

Pastperfect - Google Chrome

sandbox.pastperfectonline.com/emailrequests/new?entityname=Archive&entityid=280C0D6A-C

PastPerfect Museum
Sample site using artifacts from our demo collection

PAST PERFECT
MUSEUM SOFTWARE

Email Form


*To (email address)

*From (email address)

*Subject

*Message

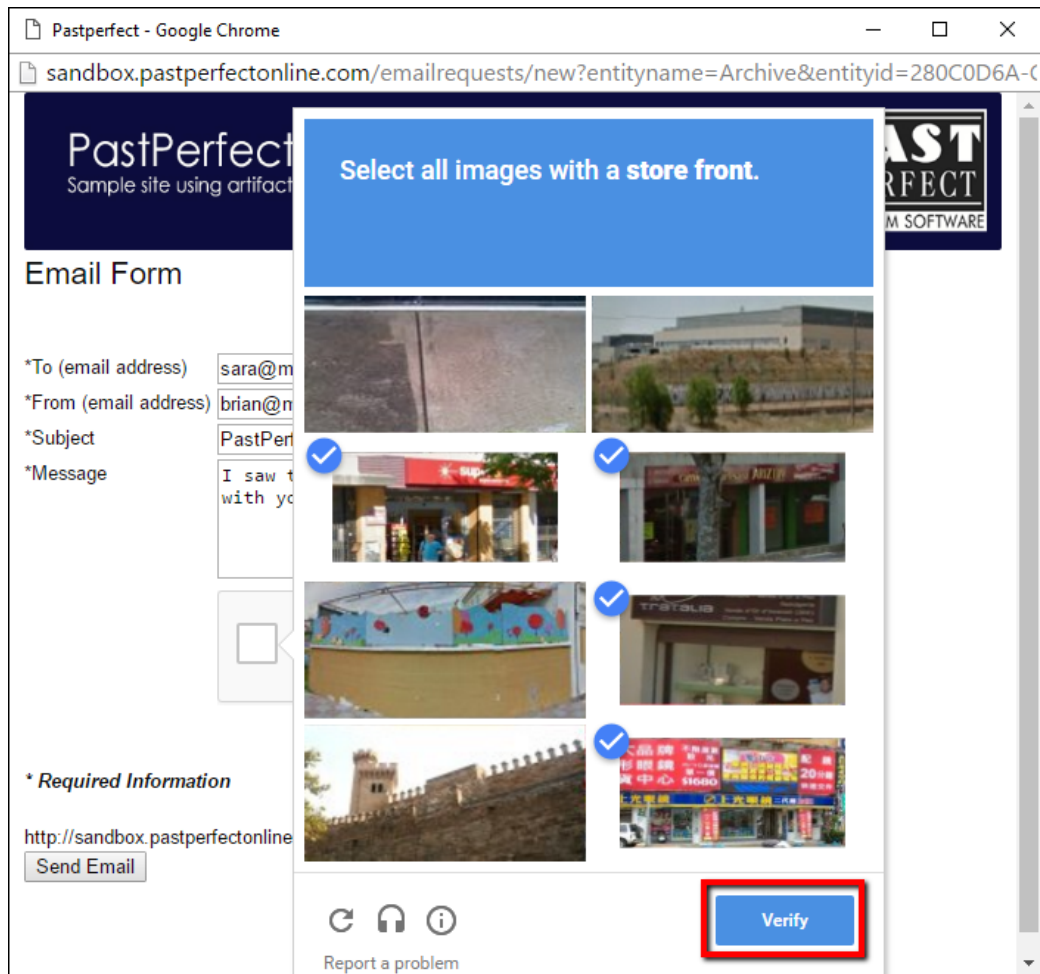
I'm not a robot


reCAPTCHA
Privacy - Terms

** Required Information*

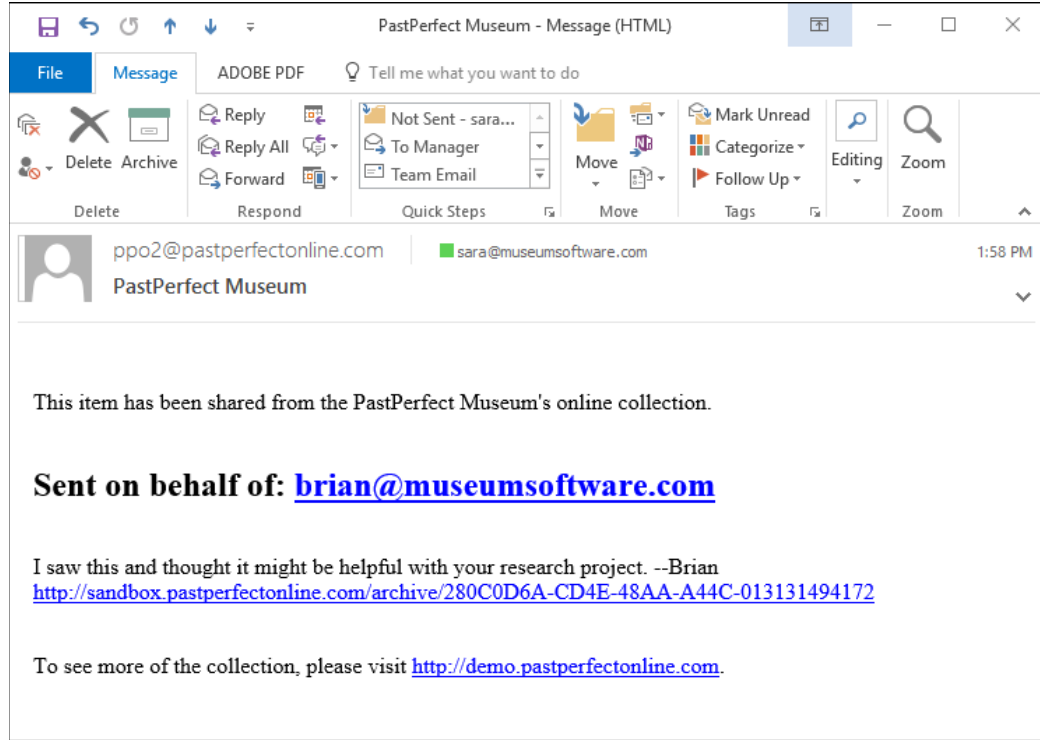
<http://sandbox.pastperfectonline.com/archive/280C0D6A-CD4E-48AA-A44C-013131494172>

4. Check the box next to "I'm not a robot".
5. If a CAPTCHA window opens, follow the instructions and then click the **Verify** button, which will close the window.



6. Click the **Send Email** button at the bottom of the form.
7. On the confirmation screen, click the **Close Window** button or wait a moment for that second window to close automatically.

8. The email recipient will receive an email like this:



References

- [Interface Management Site - Enabling and Customizing the Email A Friend Form](#)

Send Us Feedback Button

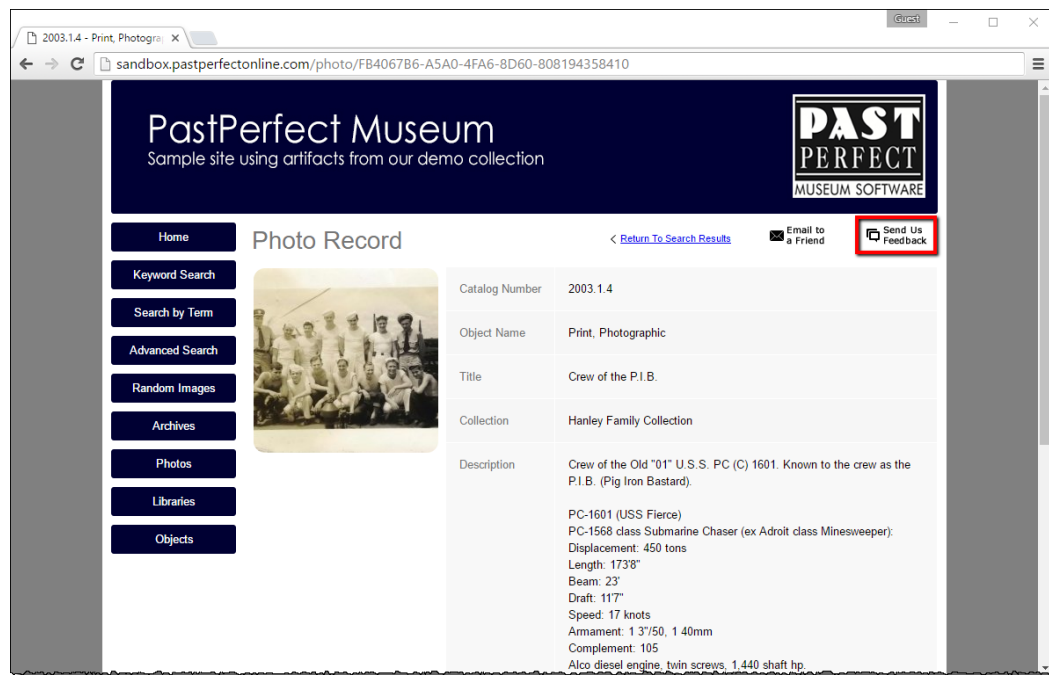
Concept

The Send Us Feedback button allows online visitors to send you feedback about a particular record directly from your PastPerfect Online site. By default, the Send Us Feedback button is displayed in the upper right corner of each catalog record page and can be suppressed at the Interface Management Site. Once the visitor submits the form, you will receive an email containing the feedback.

There are a variety of ways this form can be used including soliciting feedback, recruiting assistance in identifying photos, and much more.

Task

1. From a catalog record, click the **Send Us Feedback** button.



2. A new window will open displaying the Feedback Form. Fill out the form by entering contact information and feedback. Required fields are denoted with an asterisk (*).

Pastperfect - Google Chrome

sandbox.pastperfectonline.com/feedbacks/new?entityname=Photo&entityid=FB4067B6-A5A0-4...

PastPerfect Museum
Sample site using artifacts from our demo collection

PAST PERFECT
MUSEUM SOFTWARE

Feedback Form

Please help us by providing feedback.

*Name

Phone

Alternate Phone

*Email Address

*Comments

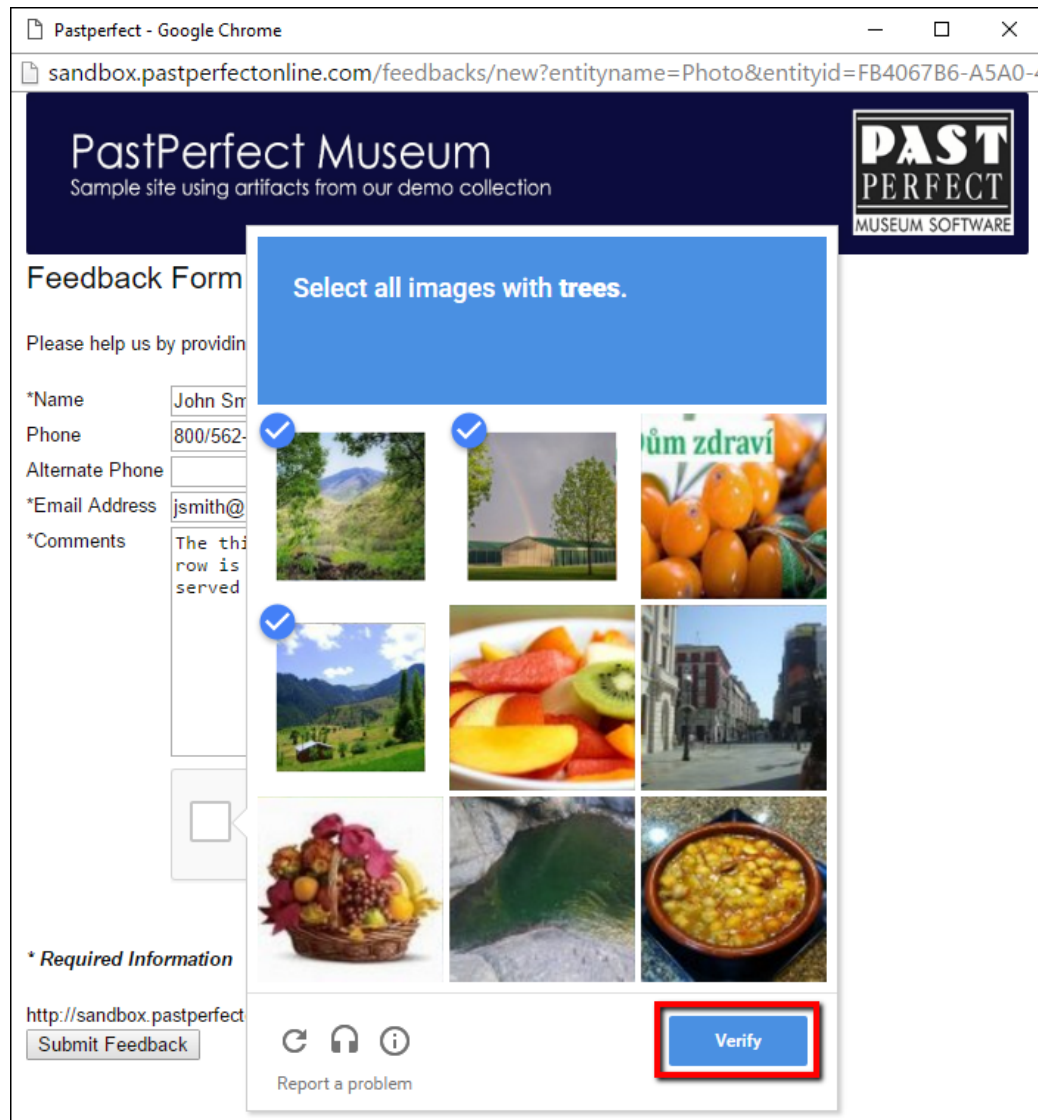
I'm not a robot

reCAPTCHA
Privacy - Terms

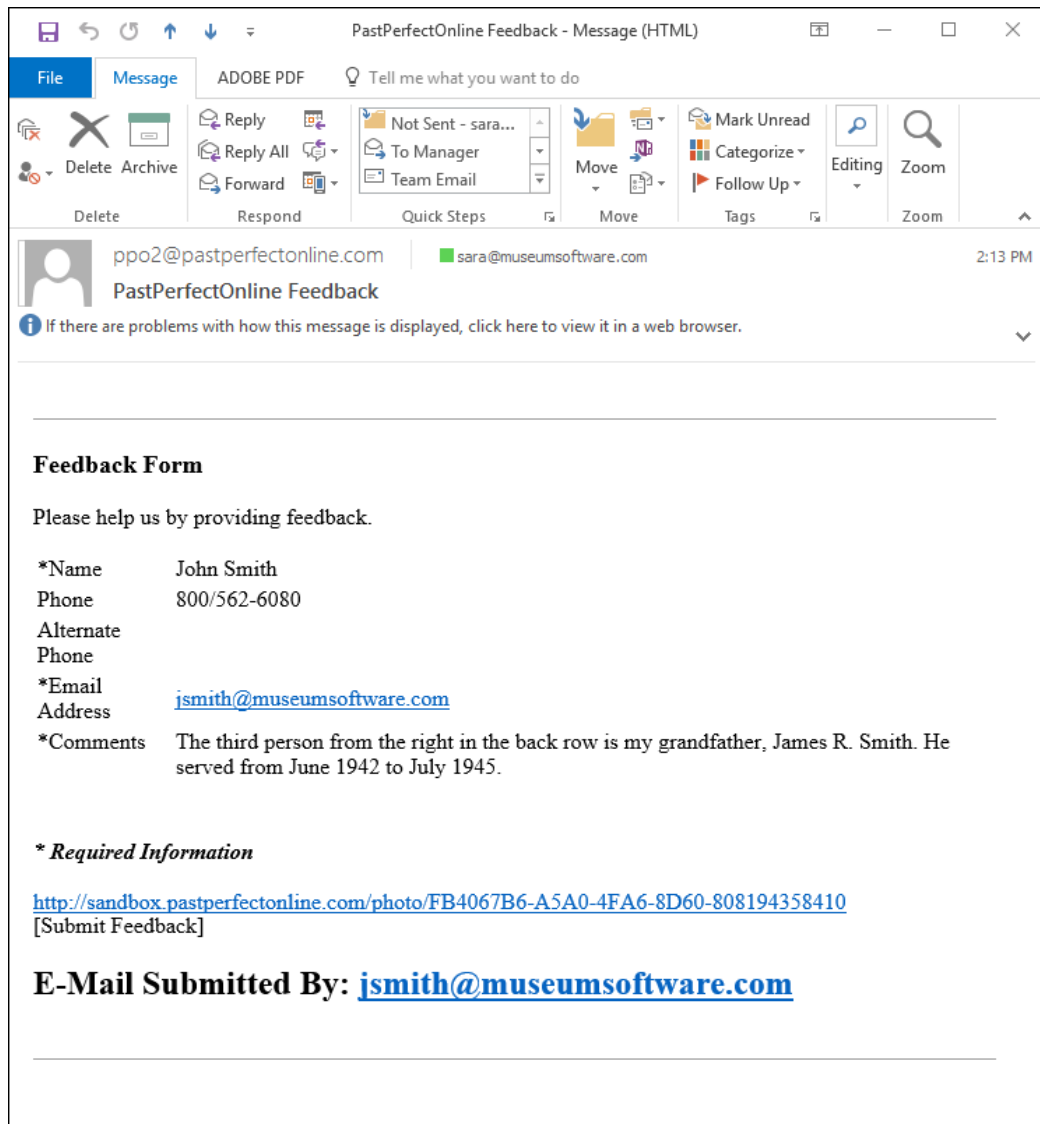
*** Required Information**

<http://sandbox.pastperfectonline.com/photo/FB4067B6-A5A0-4FA6-8D60-808194358410>

3. Check the box next to "I'm not a robot".
4. If a CAPTCHA window opens, follow the instructions and then click the **Verify** button, which will close the window.



5. Click the **Submit Feedback** button at the bottom of the form.
6. Click the **Close Window** button or wait a moment for that second window to close automatically.
7. If you are set up as the Feedback Manager in IMS, you will receive the feedback and contact information by email.



References

- [Interface Management Site - Enabling and Customizing the Feedback Form](#)

Request Image Button

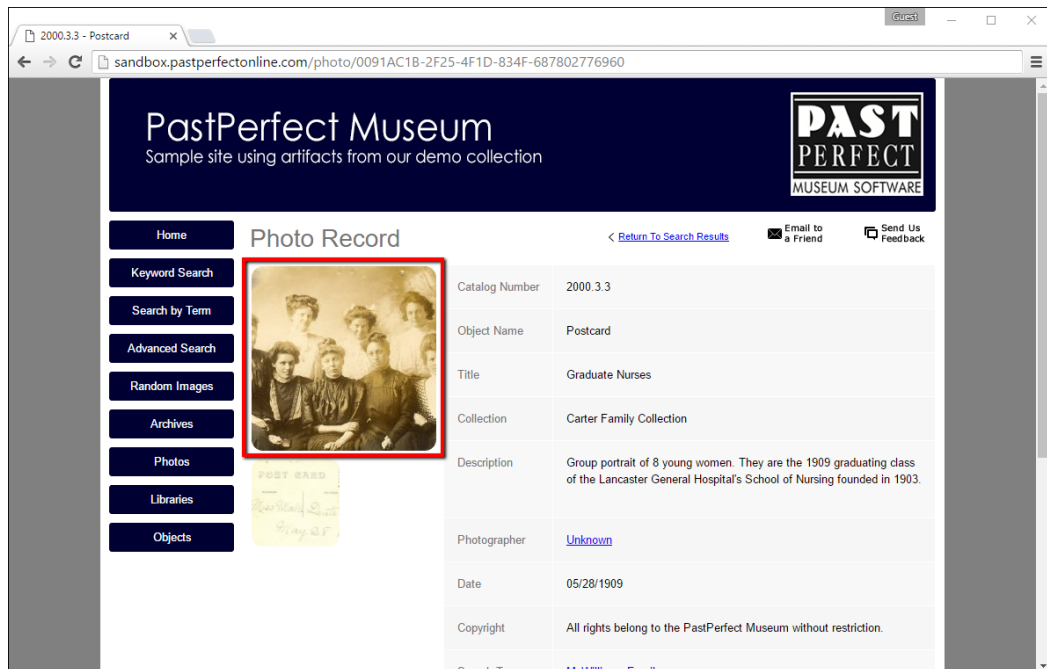
Concept

The Request Image button allows online visitors to request an image directly from your online records. Since policies and procedures for image reproductions vary greatly between institutions, this form is designed to start the communication process between you and the online visitor. When someone requests an image, you will receive an email containing the visitor's contact information and a link to the record being requested. You can then contact the person with details about how your organization handles image requests (i.e. use fees, payment options, available formats, delivery methods, etc.).

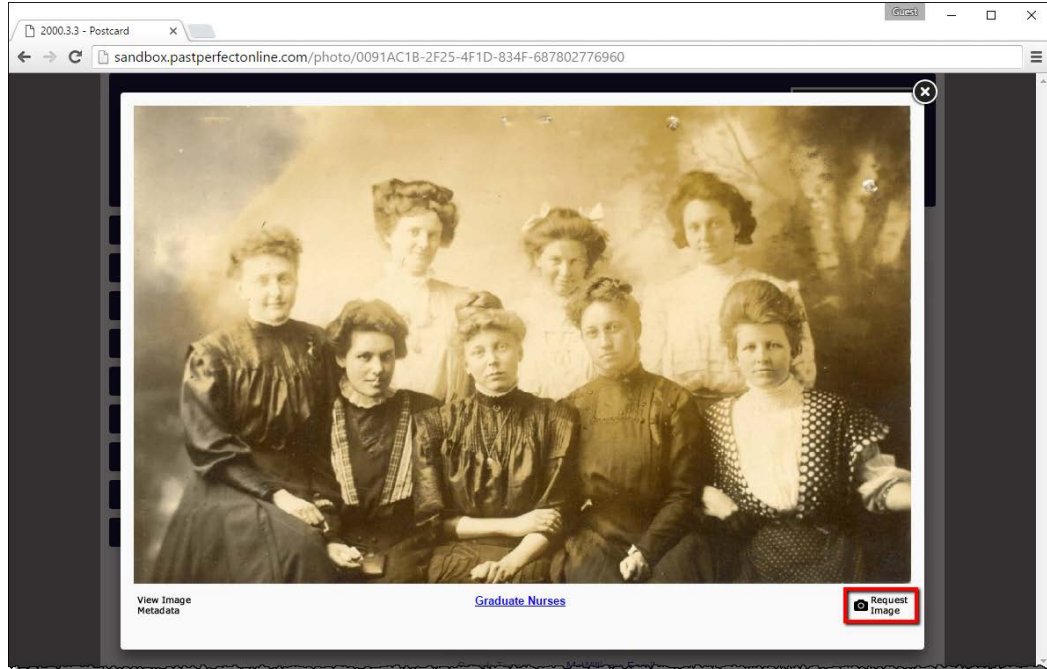
This button displays by default and can be suppressed at the Interface Management Site.

Task

1. Starting from a record page or Random Images, click on an image thumbnail to view a larger copy.



2. Click the **Request Image** button.



3. A new window will open displaying the Image Request Form. Fill out the form. Required fields are denoted with an asterisk (*).

The screenshot shows a web browser window titled "Pastperfect - Google Chrome" with the address bar displaying "sandbox.pastperfectonline.com/imageorders/new?item_url=http://sandbox.pastperfectonline.com". The page header features the "PastPerfect Museum" logo and the text "Sample site using artifacts from our demo collection" on the left, and the "PAST PERFECT MUSEUM SOFTWARE" logo on the right. The main heading is "Image Request Form". Below this is a paragraph: "Please fill out this form to request an image. A staff member will contact you to confirm the details of your request." The form fields are as follows: *Name (Anne Gibson), Address (300 N. Main St.), Address 2 (empty), City (Exton), State (PA), Zip/Postal Code (19341), Country (empty), *Phone (800/562-6080), Alternate Phone (empty), *Email Address (agibson@museumssoftware.c), Format Required (Black&White/Color, Print/Digital) (empty), and *Purpose (Personal use. My grandmother is in the photograph.). At the bottom left is a reCAPTCHA "I'm not a robot" checkbox. Below the form is a "Submit Request" button. A confirmation message at the bottom states: "An item has been requested through your PastPerfect-Online site: Url : http://sandbox.pastperfectonline.com/media/B4D6984C-7E0C-4615-A5D8-401750147523 Object # :2000.3.3 Image Name:2000.3.3.jpg".

4. Check the box next to "I'm not a robot".
5. If a CAPTCHA window opens, follow the instructions and then click the **Verify** button, which will close the window.

PastPerfect - Google Chrome

sandbox.pastperfectonline.com/imageorders/new?item_url=http://sandbox.pastperfectonline.com

PastPerfect Museum
Sample site using artifacts from our demo collection

PAST PERFECT
MUSEUM SOFTWARE

Image Request Form

Please fill out this form to request an image. A staff member will contact you to confirm the details of your request.

*Name

Address

Address

City

State

Zip/Postal

Country

*Phone

Alternate

*Email Address

Format

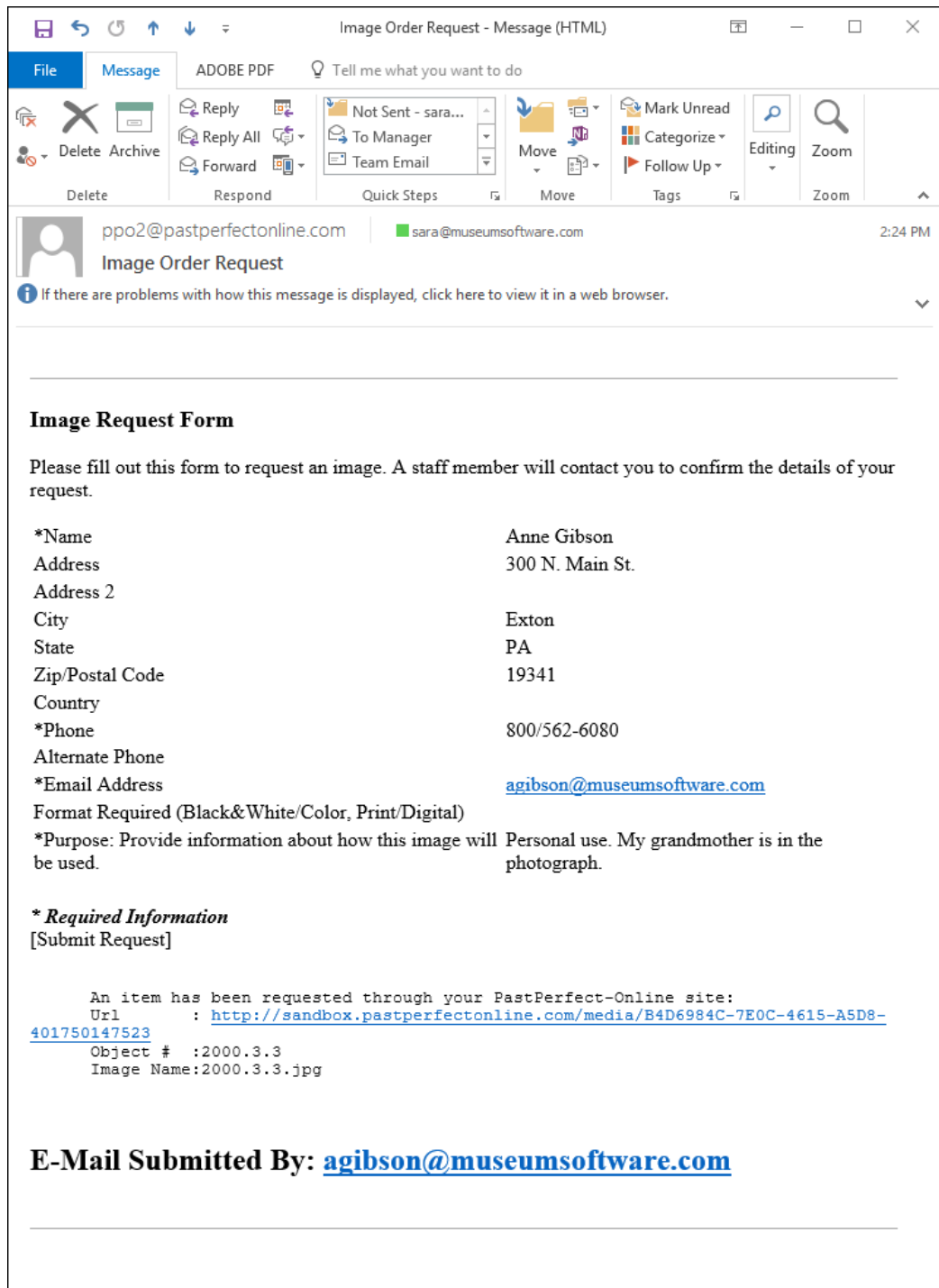
*Purpose used. My grandmother is in the

* Required

Submit

Report a problem

6. Click the **Submit Request** button at the bottom of the form.
7. On the confirmation screen. click the **Close Window** button or wait a moment for that second window to close automatically.
8. If you are set up as the Image Order Manager in IMS, you will receive an email with the image request. You can then contact the online visitor to finalize the details of the request.



References

- [Interface Management Site - Enabling and Customizing the Image Request Form](#)

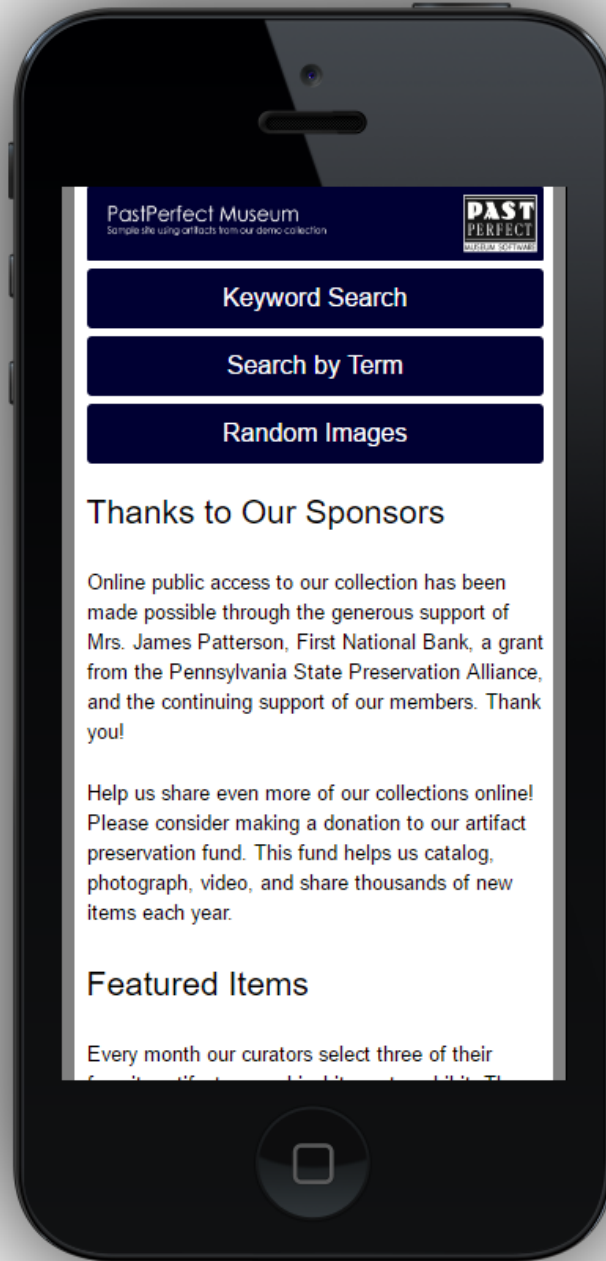
Accessing your PastPerfect Online site from Mobile Devices

Concept

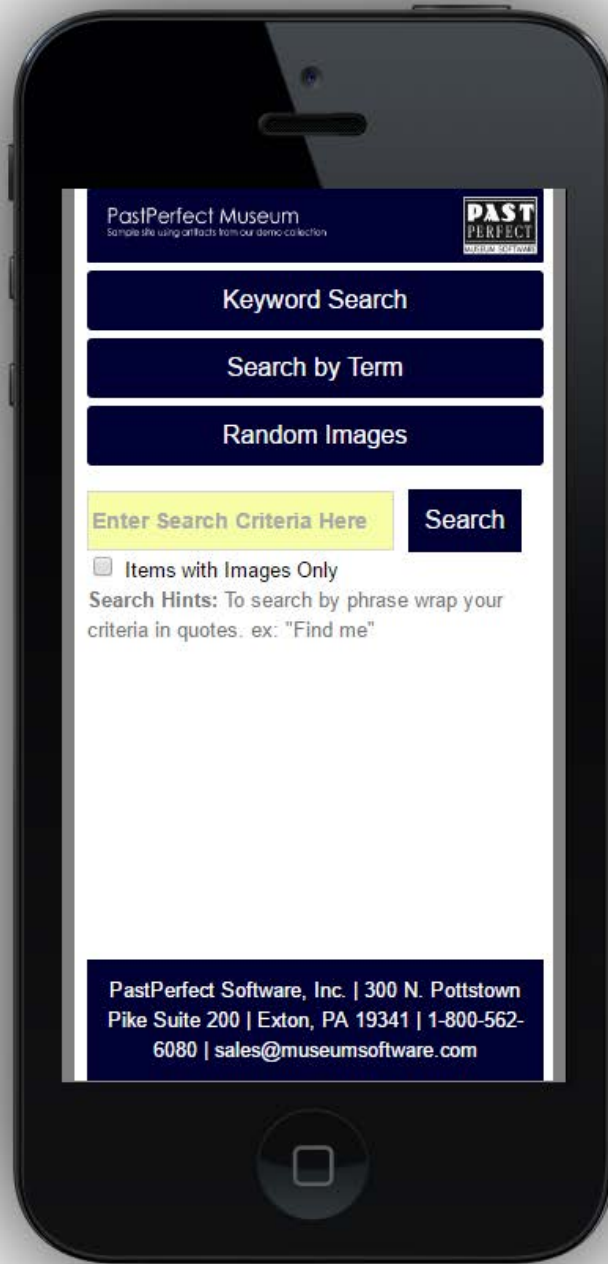
All PastPerfect Online sites utilize responsive design, allowing the site to display with maximum efficiency on screens of all sizes. This ensures that your visitors can easily access collection data no matter what type of device they use.

When viewing your PastPerfect Online site on a mobile device you have access to Keyword Search, Search by Term, and Random Images. These search options have the same functionality as they do on a full sized screen. Advanced Search and Searching By Catalog are suppressed on mobile devices to simplify the navigation and maximize the use of screen space.

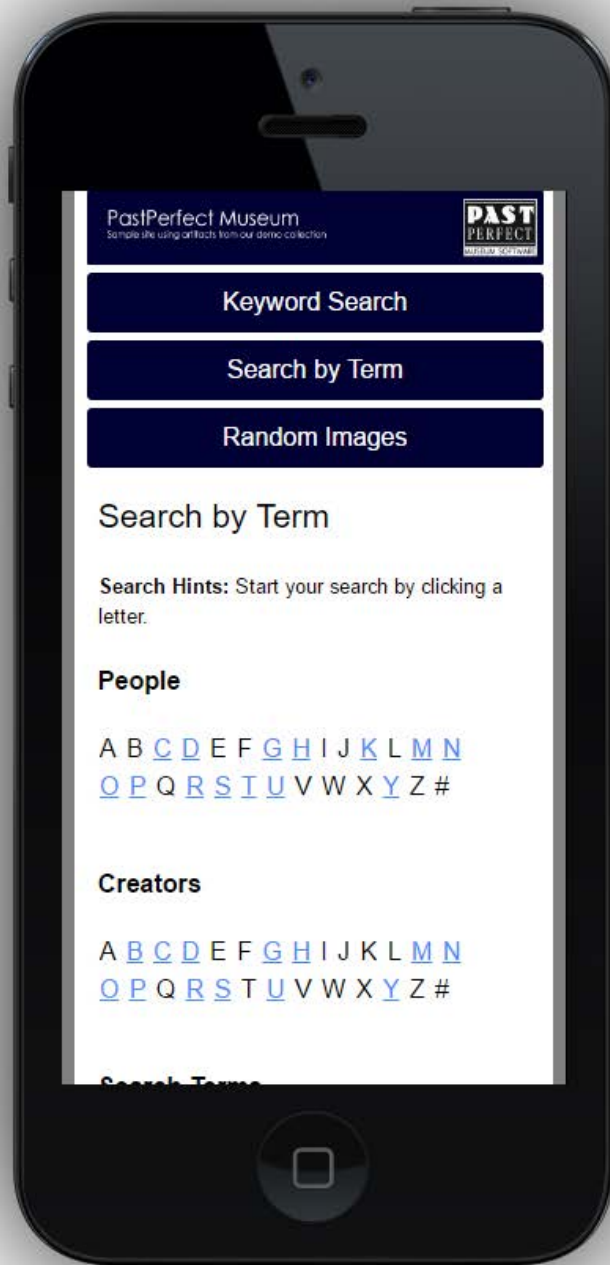
Landing Page



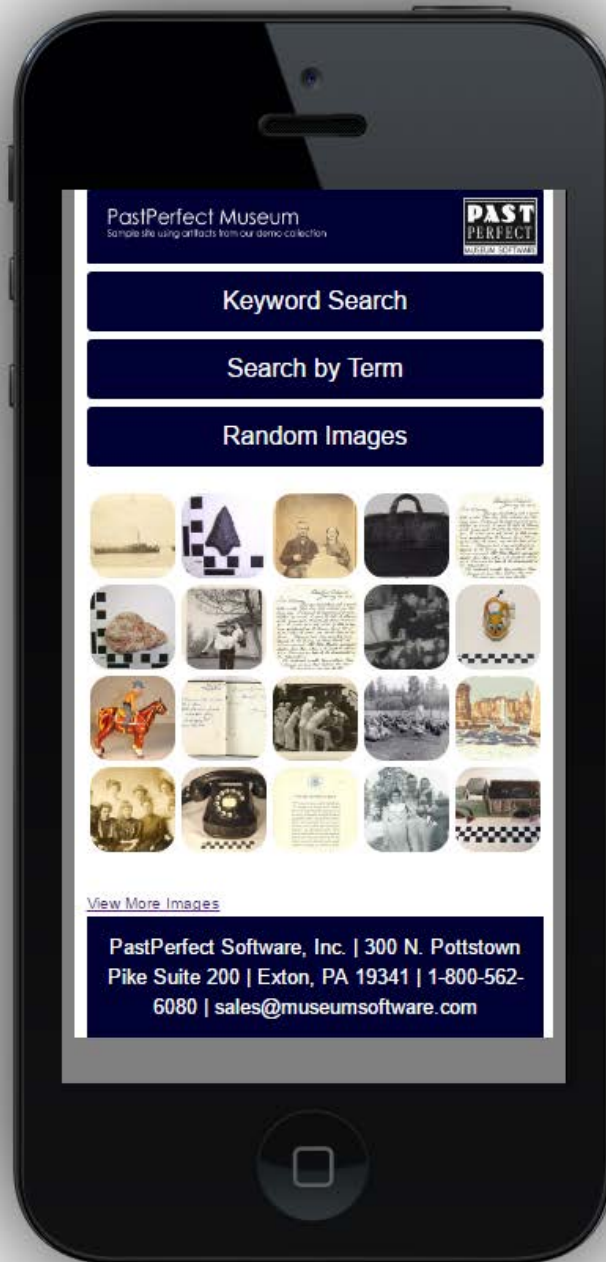
Keyword Search



Search by Term

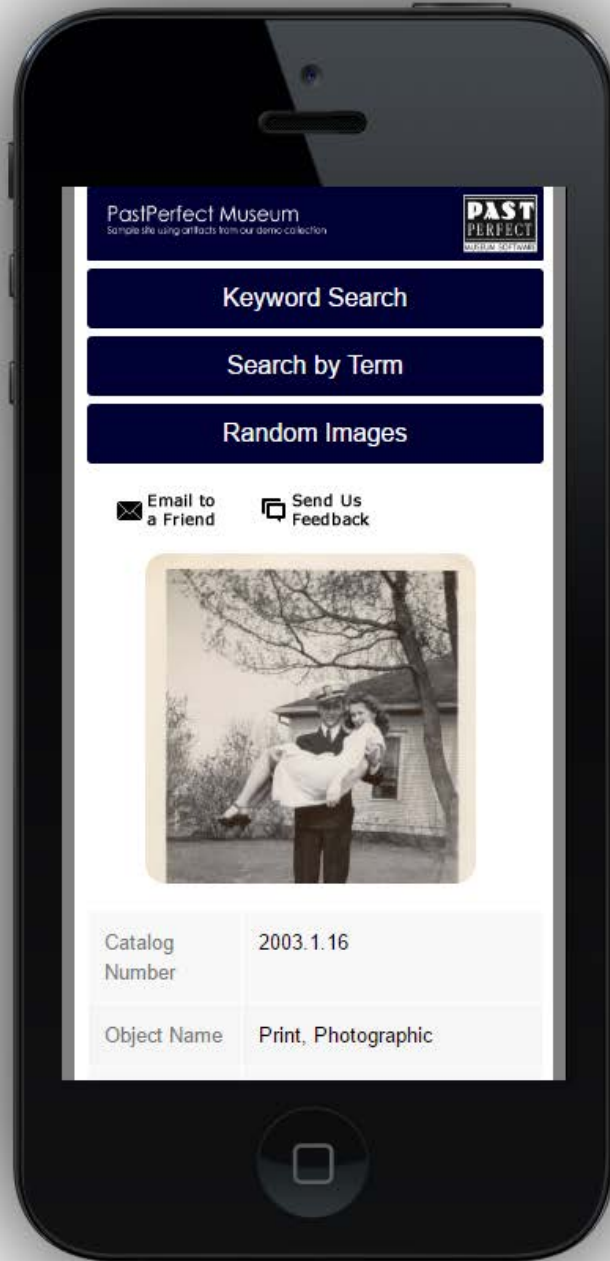


Random Images



Viewing a catalog record on a smaller screen displays the same information as you would see on a device with a larger screen. The layout is slightly different but all of the same data is present. Your visitors will have access to the email forms that you have chosen to activate for your site (Feedback, Image Order, etc.).

Catalog Record



Large Image



References

- [Getting the Most from Keyword Searching](#)
- [Using Random Images to Browse the Collection](#)

PastPerfect Online User's Guide

- [Email to a Friend Button](#)
- [Send Us Feedback Button](#)
- [Request Image Button](#)

Preparing and Selecting Records

Preparing Your Data for the Web

Concept

The selection of records, fields, and images included on your PastPerfect Online site are completely within your control. Many organizations find it helpful to discuss their goals and mission prior to their first upload.

Consider which fields you want to include online and make sure that records entered into PastPerfect have these fields populated with the appropriate data. Please note that some fields with potentially sensitive information, such as location and value fields, are not available for selection.

Web-ready copies of your images will be created in the Web Publishing Wizard. You do not need to resize or watermark your images prior to creating your files as the wizard will do this automatically. Not all images attached to a record need to be included online; the steps to select and deselect images will be reviewed in later topics.

Review your data for accuracy, spelling, and the consistent use of names and places. The more consistent and accurate your data, the more successful your visitors' searches will be. Also consider using a custom field or exhibit label field to create an audience appropriate description or interpretation of the artifact.

For assistance with strategies to review your data, please call us and we will be happy to help.

References

- Video tech Tip: [Setting up Function Keys for Consistent Data Entry](#)
- Video tech Tip: [How to Utilize PastPerfect Authority Files for Consistent Data Entry](#)
- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Selecting Image File Size](#)
- [Web Publishing Wizard - Watermark Settings](#)
- [Deselecting Images](#)

Selecting Catalog Records Individually

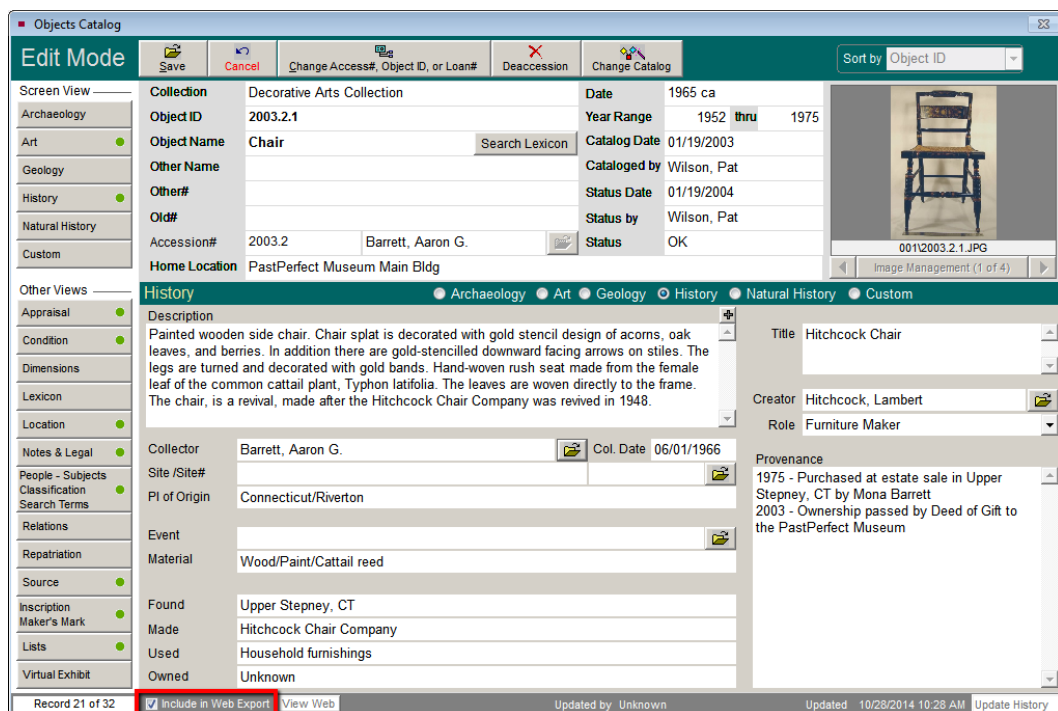
Concept

Only records marked "Include in Web Export" will be displayed on your PastPerfect Online site. At the bottom of each Object, Photo, Archive, or Library record is an **Include in Web Export** check box. Checking this box selects the catalog record for web publishing. When selecting a catalog record, all attached images are also selected for web publishing. You can deselect images individually as described in a later topic.

Note: Additional record types (creators, people, search terms, and sites) do not need to be selected individually. You can quickly select all additional record types in the Web Publishing Wizard. Please see the [More Record Types](#) section of this User Guide for additional information.

Task

1. Find a catalog record you want to publish online.
2. Click the **Edit** button in the Navigation Bar at the top of the record.
3. Check the **Include in Web Export** check box.



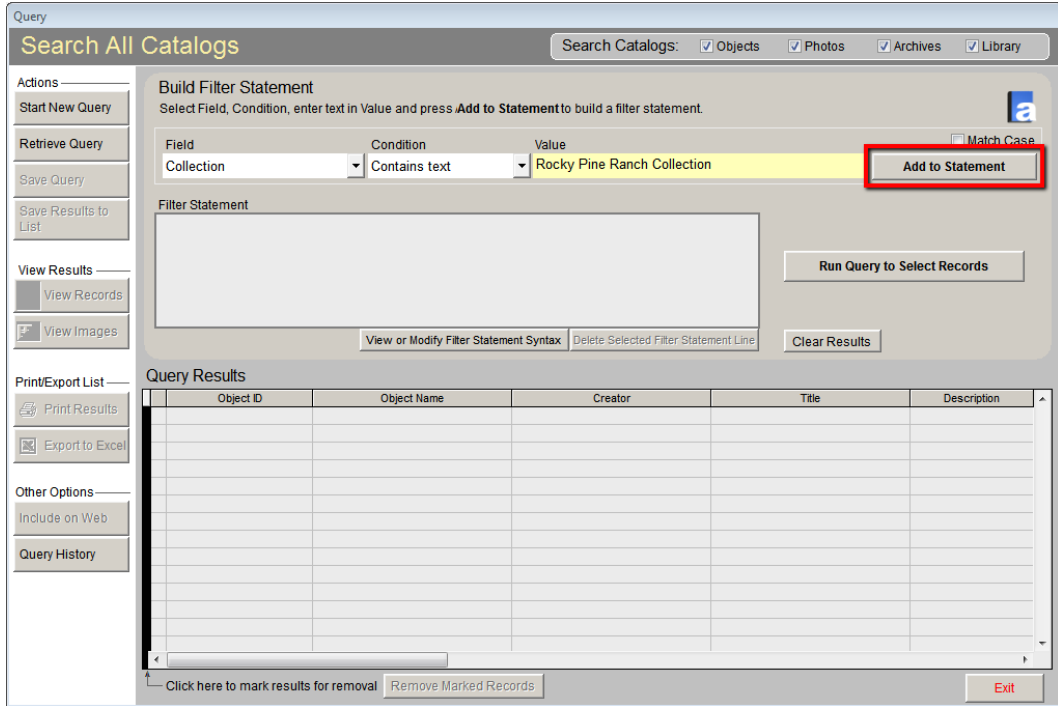
4. Click the **Save** button.

Reference

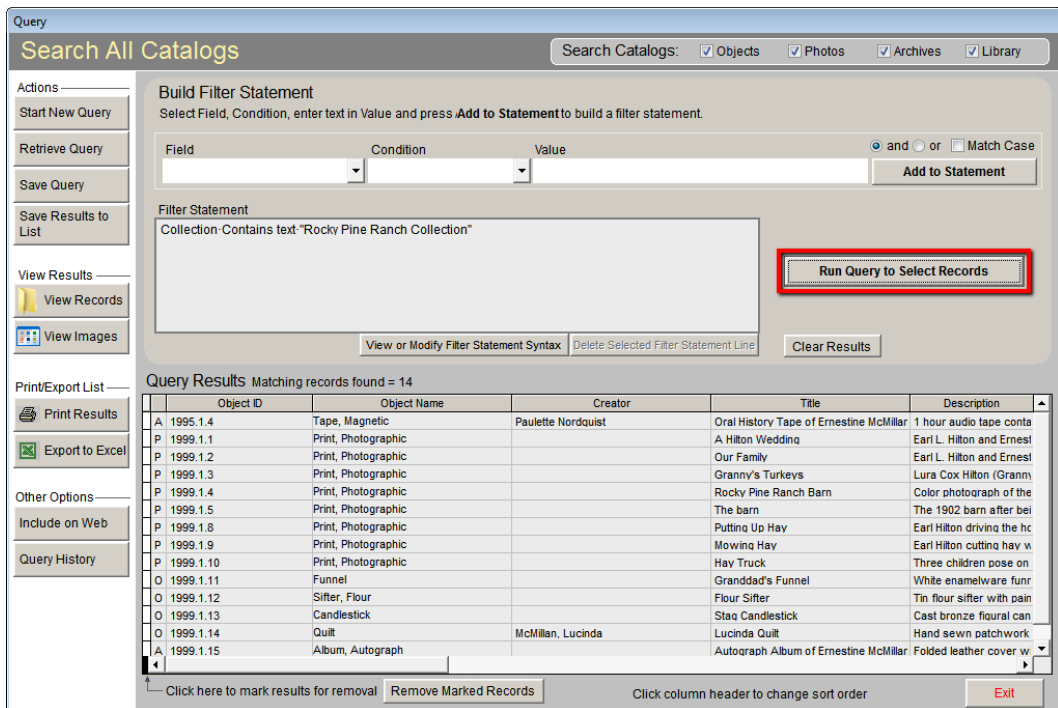
- [Selecting Catalog Records from Catalog Lists](#)
- [Selecting Catalog Records from Query Results](#)

- [Deselecting Images](#)
- More Record Types

- Click the **Add to Statement** button.



- Click the **Run Query to Select Records** button. The records matching your search will display in Query Results.



- Click the **Include on Web** button. This will check the "Include in Web Export" check box on each of these catalog records. This also marks all of the images attached to these records for export.

The screenshot shows the 'Query' interface with the following components:

- Search All Catalogs:** Search Catalogs: Objects Photos Archives Library
- Actions:** Start New Query, Retrieve Query, Save Query, Save Results to List, View Results (View Records, View Images), Print/Export List (Print Results, Export to Excel), Other Options (Include on Web, Query History).
- Build Filter Statement:** Select Field, Condition, enter text in Value and press Add to Statement to build a filter statement. Filter Statement: Collection Contains text "Rocky Pine Ranch Collection".
- Query Results:** Matching records found = 14. Table with columns: Object ID, Object Name, Creator, Title, Description.

Object ID	Object Name	Creator	Title	Description
A 1995.1.4	Tape, Magnetic	Paulette Nordquist	Oral History Tape of Ernestine McMillan	1 hour audio tape conta
P 1999.1.1	Print, Photographic		A Hilton Wedding	Earl L. Hilton and Ernest
P 1999.1.2	Print, Photographic		Our Family	Earl L. Hilton and Ernest
P 1999.1.3	Print, Photographic		Granny's Turkeys	Lura Cox Hilton (Grann
P 1999.1.4	Print, Photographic		Rocky Pine Ranch Barn	Color photograph of the
P 1999.1.5	Print, Photographic		The barn	The 1902 barn after bei
P 1999.1.8	Print, Photographic		Putting Up Hay	Earl Hilton driving the hc
P 1999.1.9	Print, Photographic		Mowing Hay	Earl Hilton cutting hay v
P 1999.1.10	Print, Photographic		Hay Truck	Three children pose on
O 1999.1.11	Funnel		Granddad's Funnel	White enamelware funn
O 1999.1.12	Sifter, Flour		Flour Sifter	Tin flour sifter with pain
O 1999.1.13	Candlestick		Staq Candlestick	Cast bronze floual can
O 1999.1.14	Quilt	McMillan, Lucinda	Lucinda Quilt	Hand sewn patchwork
A 1999.1.15	Album, Autograph		Autoograph Album of Ernestine McMillan	Folded leather cover w

- Click **Yes** on the PastPerfect Message to confirm the selection of these records. Click **OK** on the next PastPerfect Message that appears.

Reference

- [Selecting Catalog Records from Catalog Lists](#)
- [Selecting Catalog Records Individually](#)
- [Deselecting Images](#)

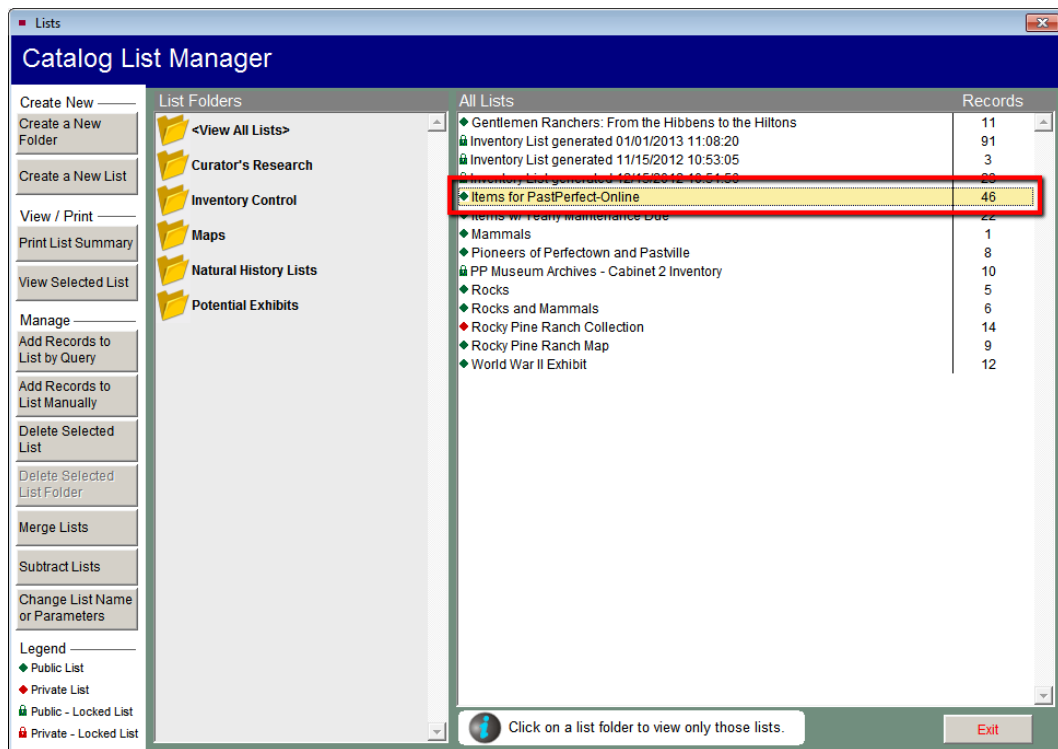
Selecting Catalog Records from Catalog Lists

Concept

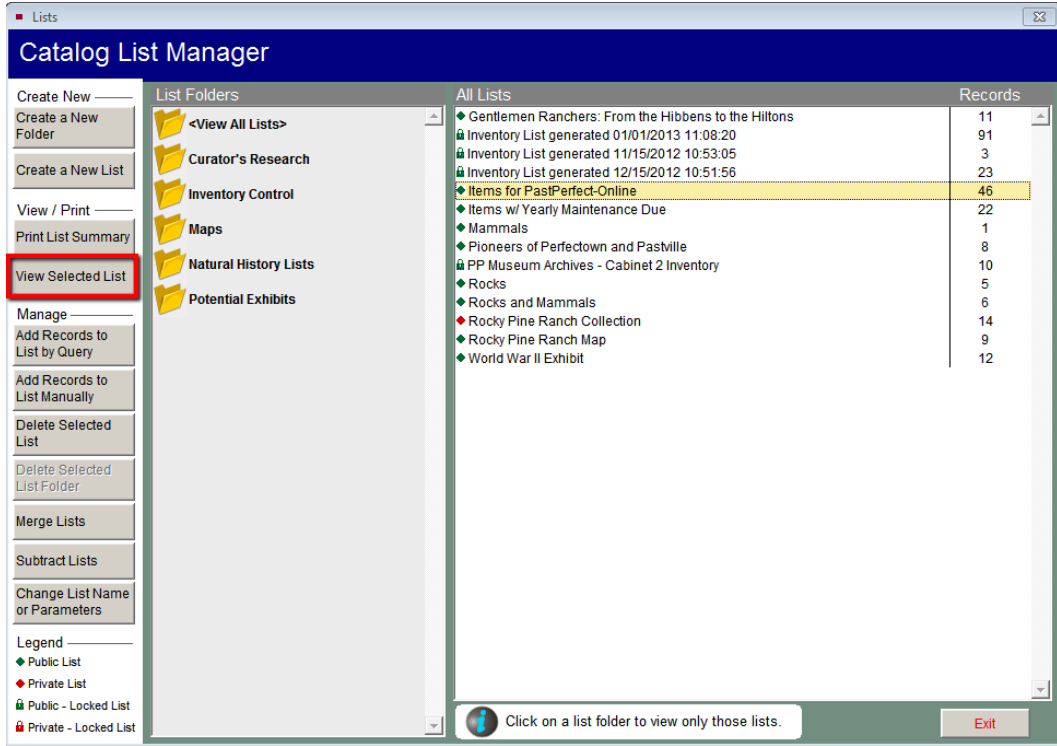
A Catalog List consists of records that have been added through the use of PastPerfect's Research functions or by individually placing these records on the list. Once you have placed a group of records on a Catalog List, you have the ability to mark all list records as "Include in Web Export".

Task

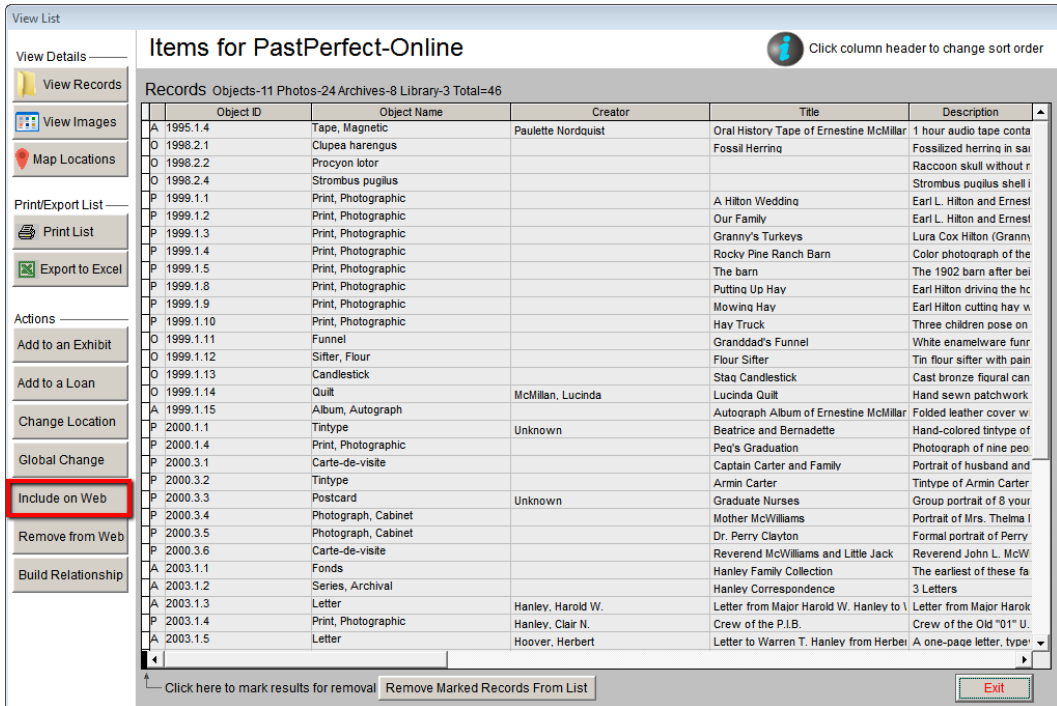
1. Click the **Catalog Lists** button on the Main Menu of PastPerfect.
2. Select the catalog list you want to include for web publishing.



3. Click the **View Selected List** button.



4. Click the **Include on Web** button. This will check the "Include in Web Export" check box on each of these catalog records. This also marks all of the images attached to these records for export.



5. Click **Yes** on the PastPerfect Message to confirm the selection of these records. Then click **OK**.

Reference

- [Selecting Catalog Records from Query Results](#)
- [Selecting Catalog Records Individually](#)
- [Deselecting Images](#)

Deselecting Images

Concept

When a catalog record is selected for web export, all attached images are also selected. For records with multiple images, you may want to select only certain images. Deselecting an image is done from the Image Management screen of each catalog record.

Task

1. From the catalog record, click the **Image Management** button.
2. At the bottom of the screen, navigate to the image you want to deselect, then click the **Metadata** button.



3. Click the **Edit** button.

4. Uncheck the **Include in Web** check box, then click **Save**.

Image Metadata

Original Object Size

Original Object Format (type of print or negative)

Negative Number

Equipment Used to Acquire: Sony Cyber-Shot 5.0 Mega P

Software Used to Acquire

Settings and Resolution

Grayscale or RGB (color): Color Picture

Created by: Parr, Mary L.

Date Created: 12/10/2003

Copyrights

Location of High Resolution Archival Image

Link to High Resolution Image: MultiMedia Link

Uncompressed File Size	4,717,584	bytes
Actual Image File Size	231,808	bytes
Height	1086	pixels
Width	1448	pixels

Format: JPEG (Standard DCT)

Bits/Pixel: 24 bit color image

Image File Name: c:\pp5_sandbox\images\001\2003.2.1-4.JI

Fill New Entries from Last

Include in Web

Restricted

View EXIF Information

View Detail Notes

View Geospatial Data

Updated 01/24/2010 11:22 AM

Save Cancel

Reference

- [Deselecting Catalog Records Individually](#)
- [Deselecting Catalog Records from Catalog Lists](#)

Deselecting Catalog Records Individually

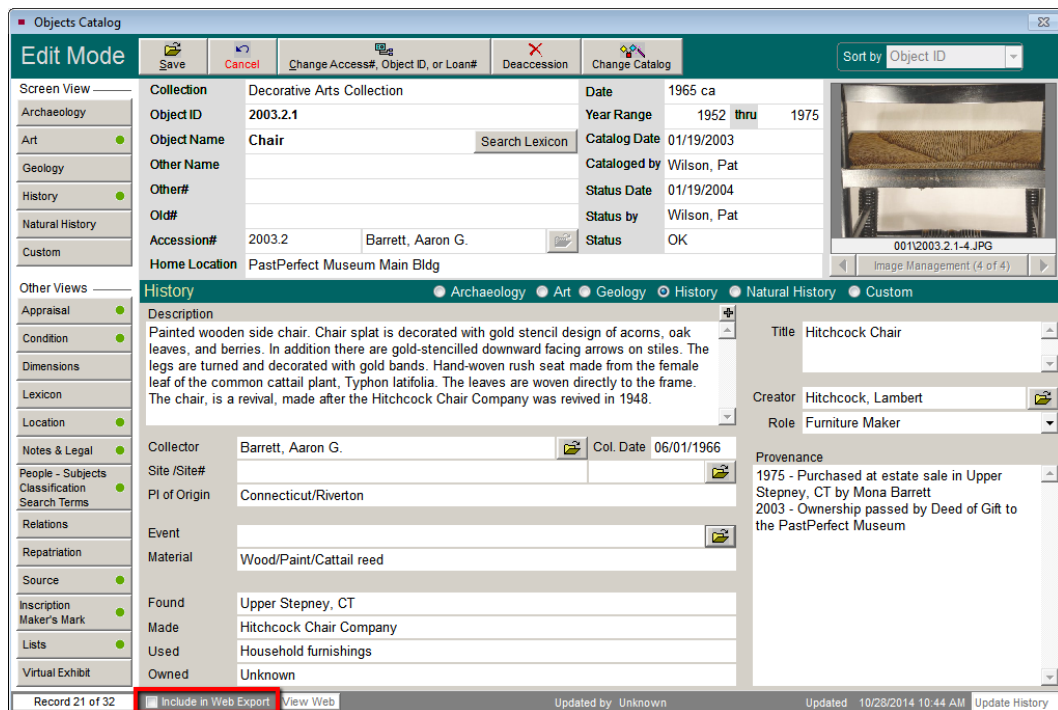
Concept

At some point, you may decide to remove specific records from your PastPerfect Online site. When you deselect a record for web export, the attached images will also be deselected. After records have been deselected, you will need to go to the Web Publishing Wizard and create and upload new files. This will remove the data and images from your site that you no longer want to have online.

The steps below show how to deselect records one at a time. To deselect a group of records, see the Reference section.

Task

1. Find a catalog record you want to remove from your website.
2. Click the **Edit** button in the Navigation Bar at the top of the record.
3. Uncheck **Include in Web Export**.



4. Click the **Save** button.

Reference

- [Deselecting Catalog Records from Catalog Lists](#)
- [Deselecting Images](#)

Deselecting Catalog Records from Catalog Lists

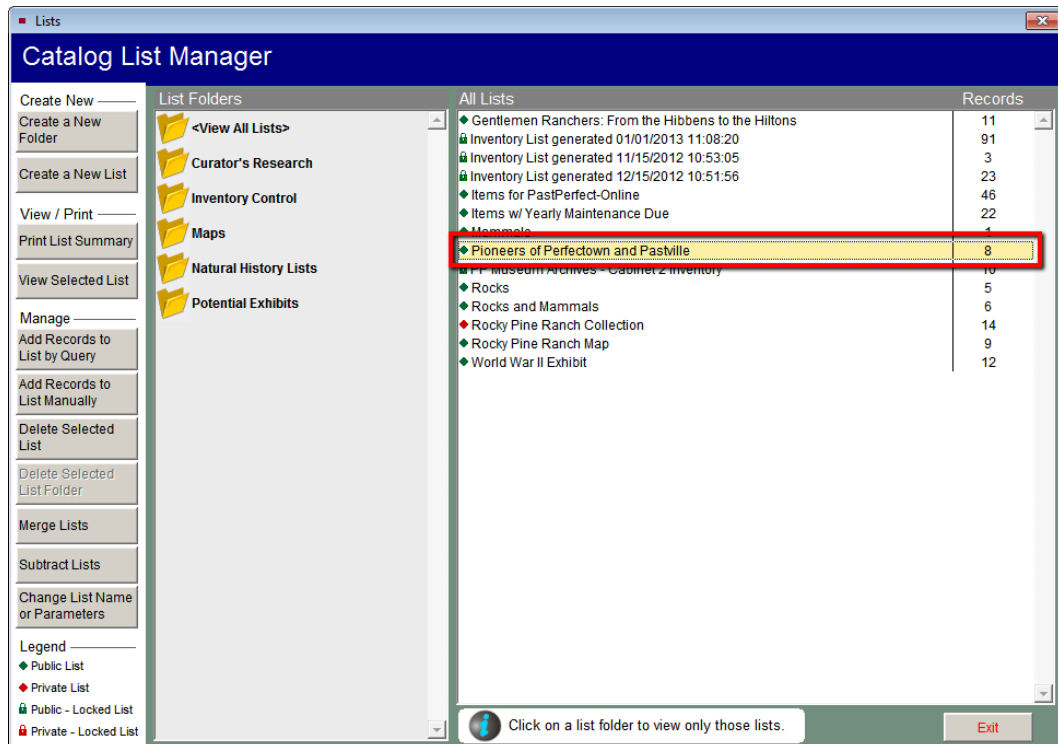
Concept

You can remove a large number of records from your PastPerfect Online site using Catalog Lists. These lists can be created using research tools or compiled manually. When you deselect these records, the attached images will also be deselected for web publishing.

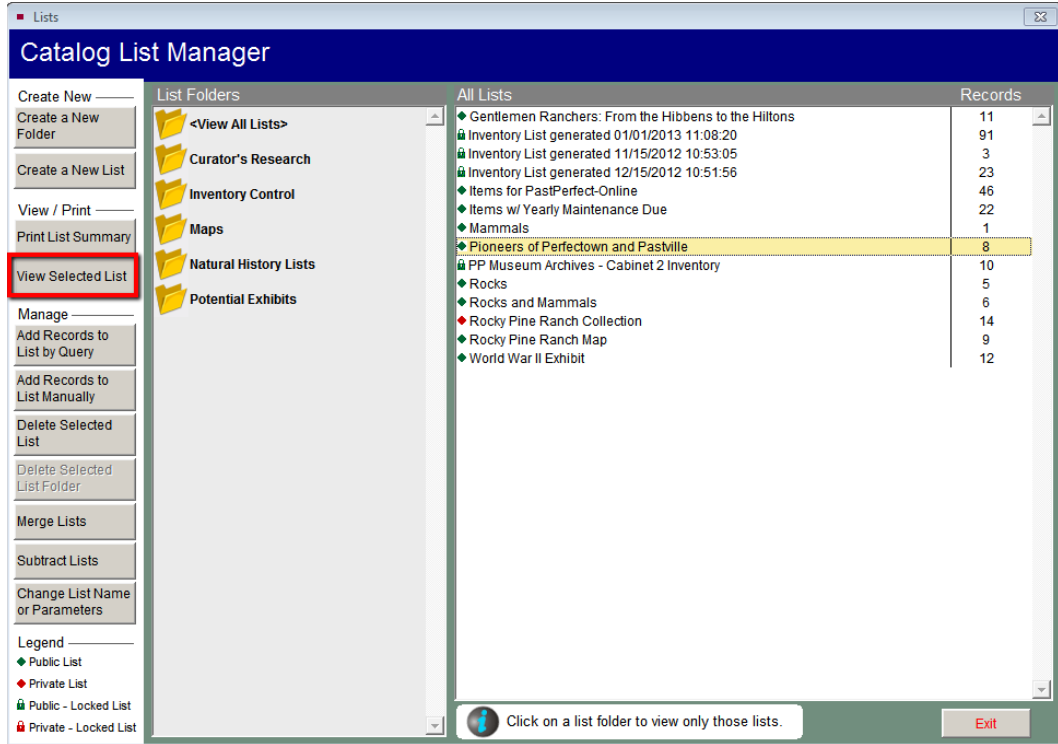
After records have been deselected, you will need to go to the Web Publishing Wizard to create and upload new files. This will remove the data and images from your site that you no longer want to have online.

Task

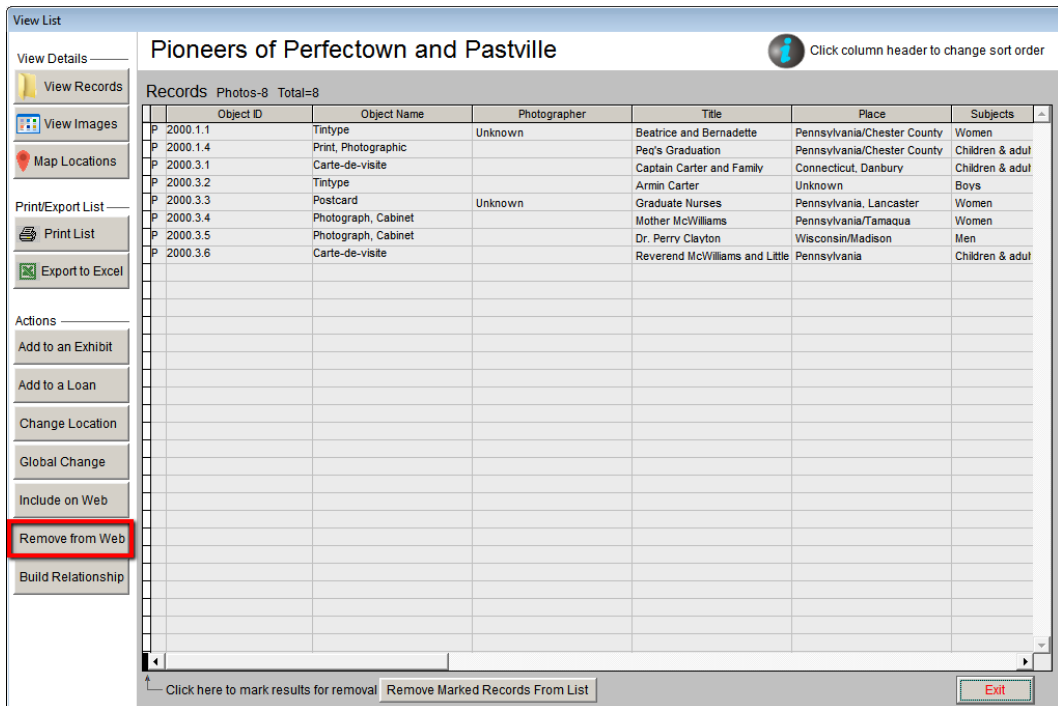
1. Click the **Catalog Lists** button on the Main Menu of PastPerfect.
2. Click the name of the catalog list to be deselected.



3. Click the **View Selected List** button.



4. Click the **Remove from Web** button. This will uncheck "Include in Web Export" for each of these catalog records. This also deselects all of the images attached to these records.



5. Click **Yes** on the PastPerfect Message to confirm the removal of these records then click **OK**.

Reference

- [Deselecting Catalog Records Individually](#)
- [Deselecting Images](#)

The Web Publishing Wizard

Introduction to the Web Publishing Wizard

Concept

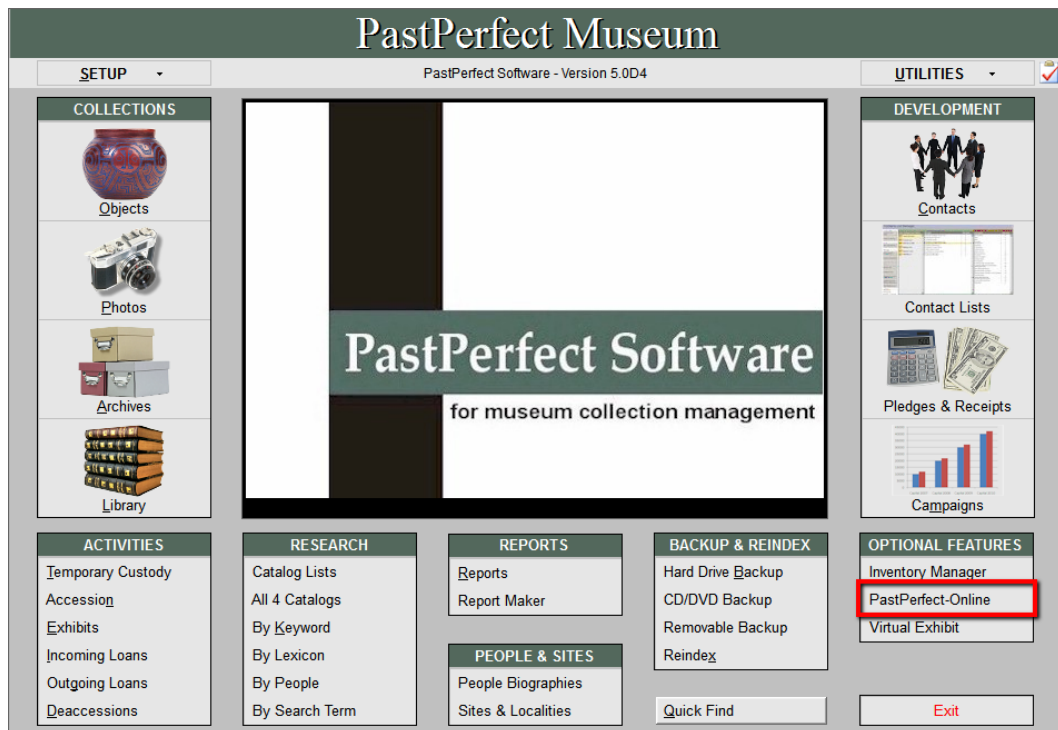
The Web Publishing Wizard is an area of PastPerfect that is unlocked when you have the PastPerfect Online Upgrade installed. The wizard guides you through the step-by-step process to create and upload records to your PastPerfect Online site. Many of the steps in the wizard have default selections, but you should review each step to be sure the selections are what you want for your site.

Steps in the Web Publishing Wizard include:

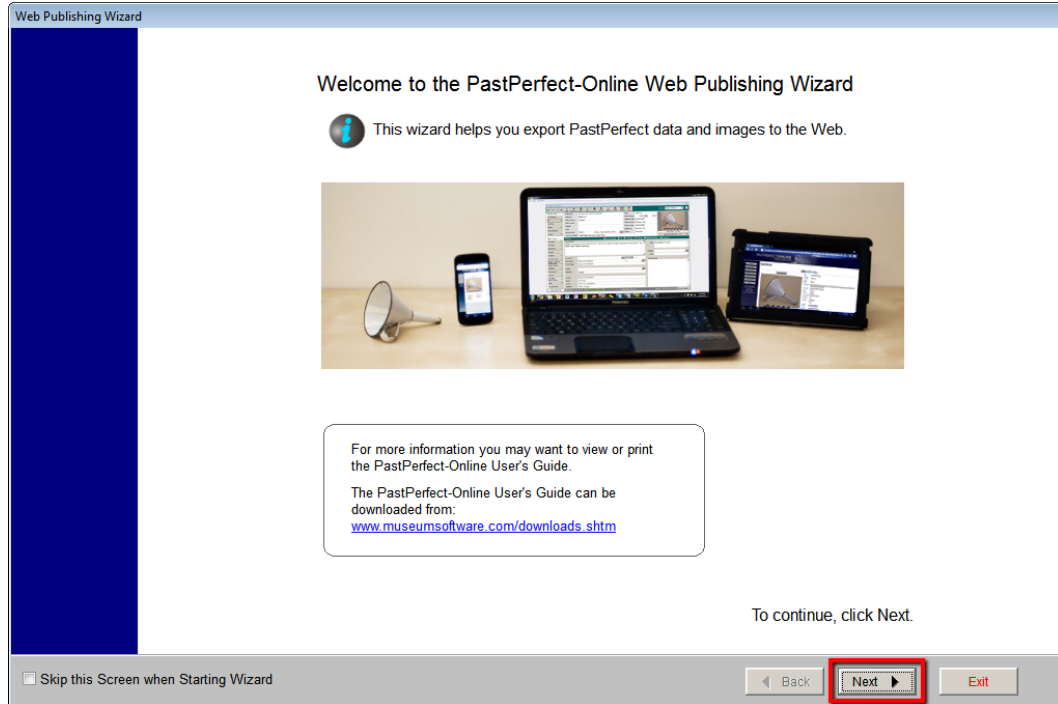
- Selecting Data Fields and Assigning Field Order
- Customizing Field Names
- Setting Up Advanced Search Categories and Mapping Fields
- Browsing Files Before Publishing
- Creating Web Publishing Files
- Publishing Files to the Web

Task

1. To access the Web Publishing Wizard, click the **PastPerfect-Online** button on the Main Menu.



2. From this screen you will access the additional steps in the wizard.



References

- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Customizing Field Names](#)
- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- [Web Publishing Wizard - Browsing Files Before Publishing](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)
- [Web Publishing Wizard - Publishing Files to Web](#)

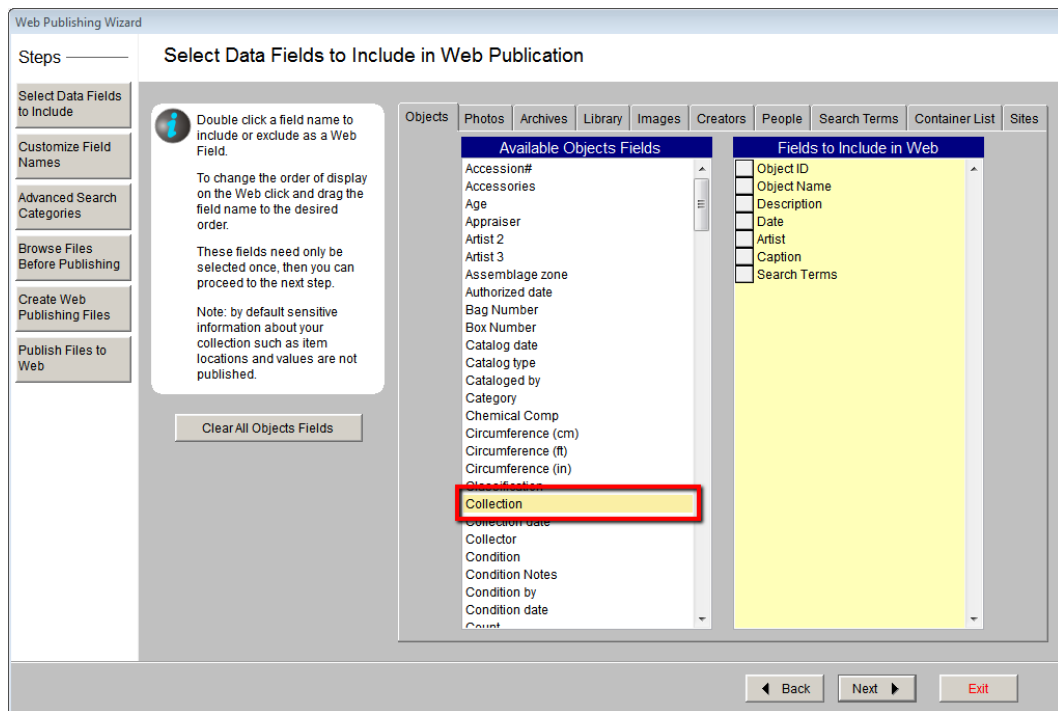
Web Publishing Wizard - Selecting Data Fields

Concept

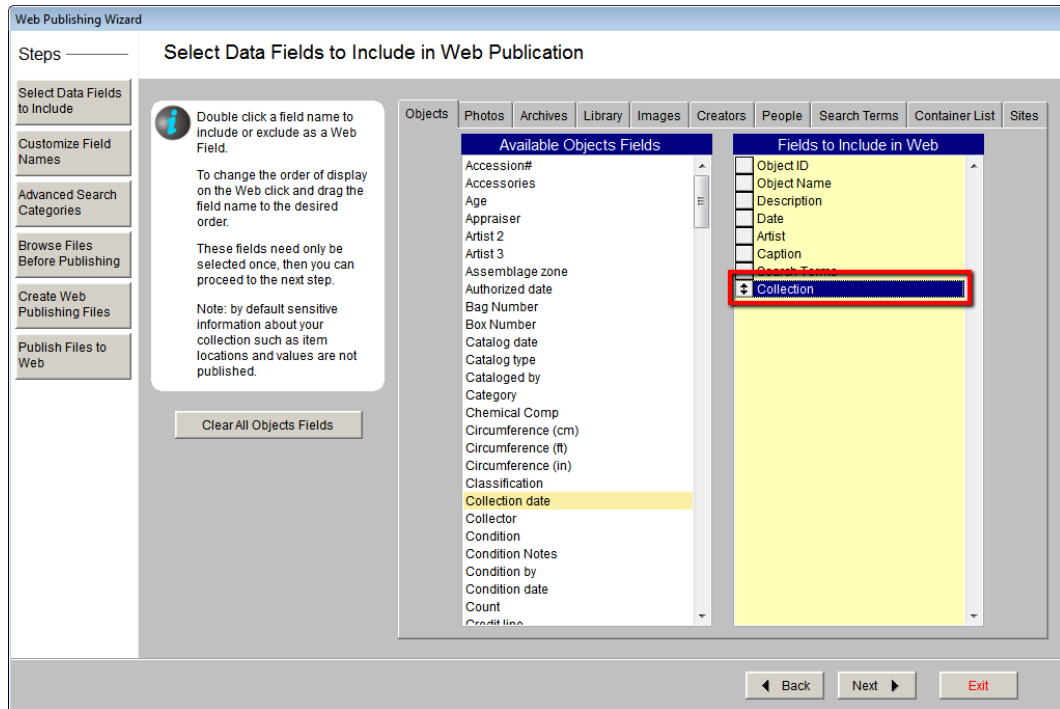
The first step of the Web Publishing Wizard involves selecting and arranging the data fields you want to publish online. Choose fields that will help tell the story of the artifact and place them in logical order. Pay particular attention to which two fields are selected first as these fields will also be displayed as hyperlinks on search results and random image pages. While this topic covers selecting and arranging fields in object records, the concept is the same for all catalog types. Some fields that contain value or location information are not available for web publishing. Your selections will be saved and can be revised at any time.

Task

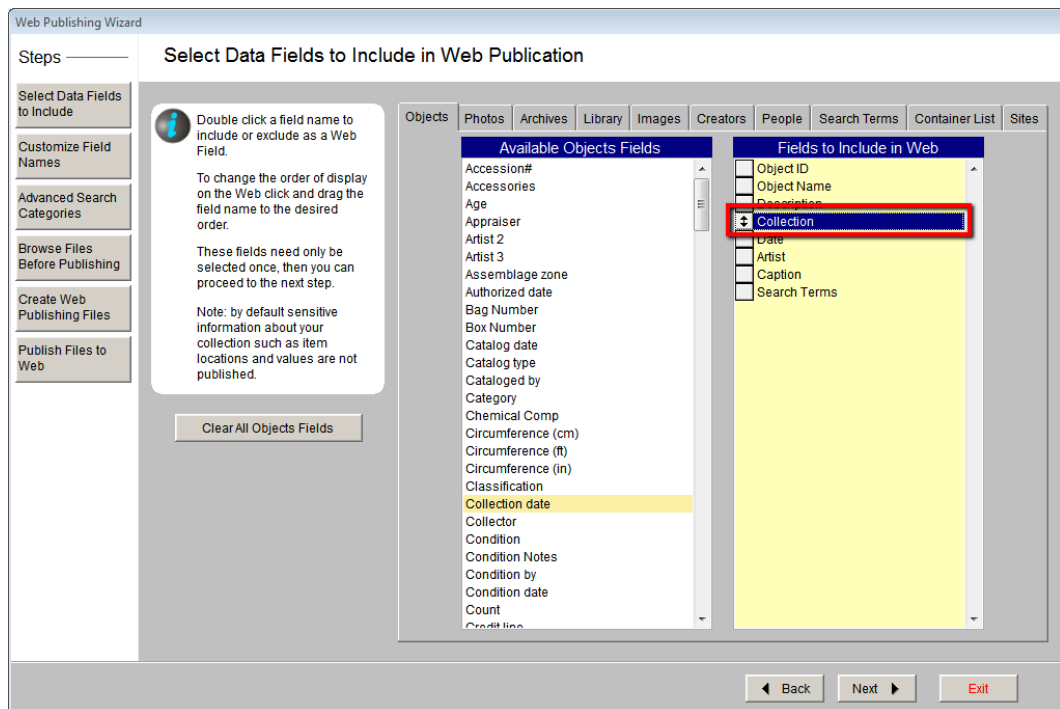
1. Click the **Select Data Fields to Include** button.
2. Click the **Objects** tab to view the selected fields for that database.
3. Double click on a field name in the **Available Objects Fields** list. This will move the field to the **Fields to Include in Web** list.



4. To remove a field, double click on a field name in the **Fields to Include in Web** list. This will move the field back to the **Available Objects Fields** list.
5. To change the order of how fields display online, click the gray box to the left of a field name. The box will now have an up/down arrow.



6. Click and drag the up/down arrow to a new position.



7. Repeat these steps for each tab.

Reference

- [Introduction to the Web Publishing Wizard](#)
- [Web Publishing Wizard - Customizing Field Names](#)
- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- [Web Publishing Wizard - Browsing Files Before Publishing](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)
- [Web Publishing Wizard - Publishing Files to Web](#)

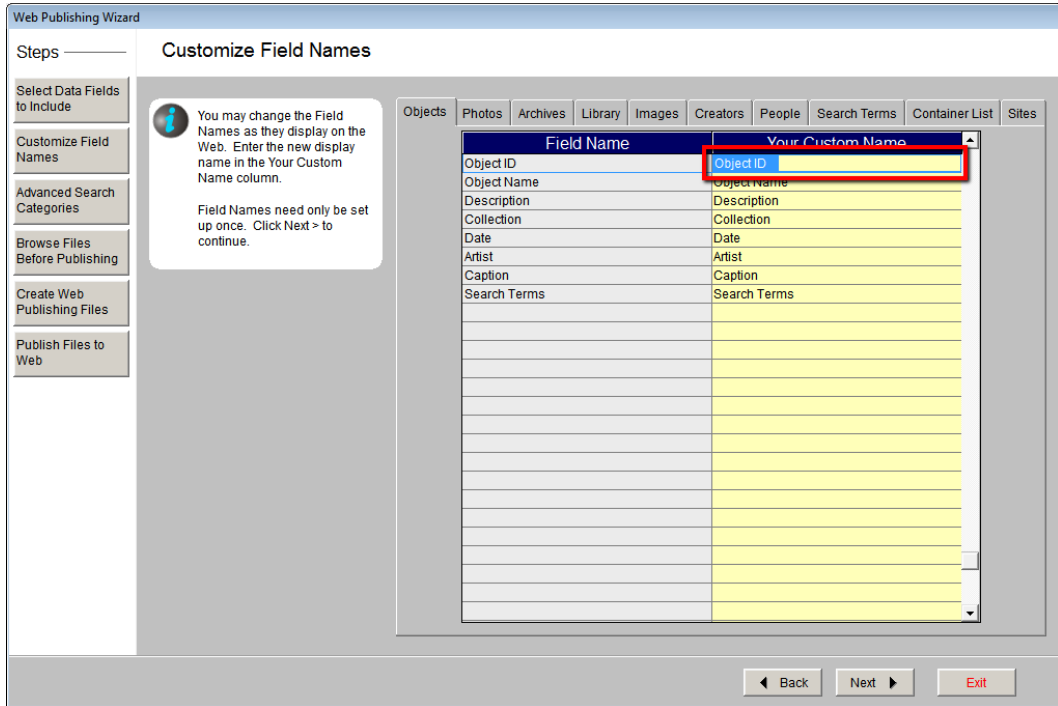
Web Publishing Wizard - Customizing Field Names

Concept

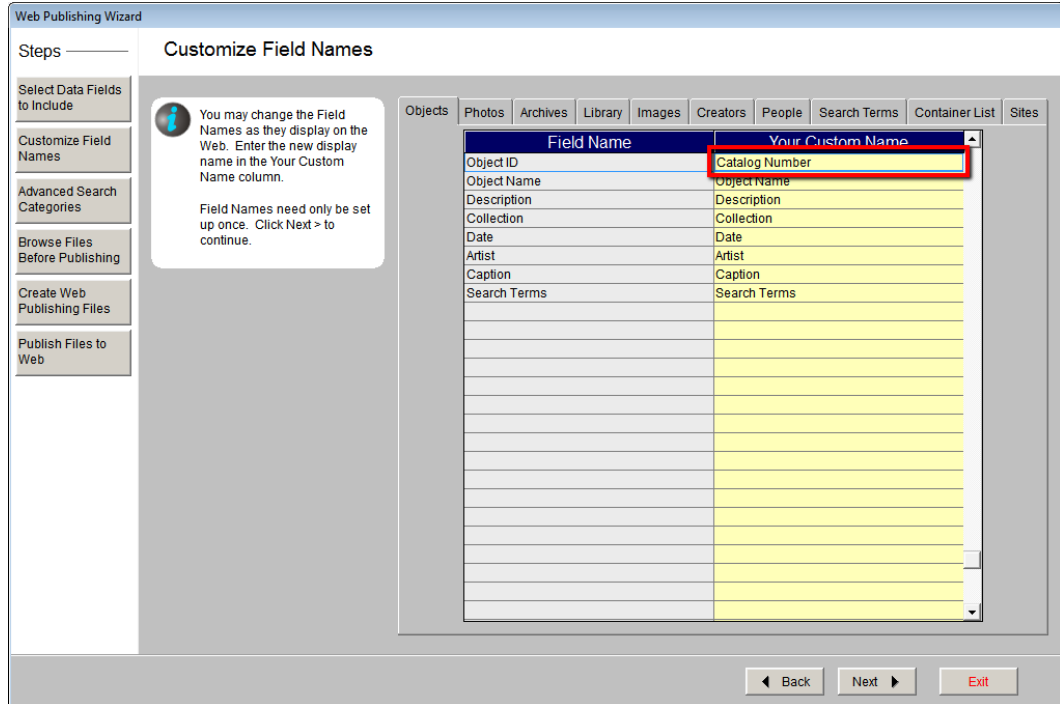
By default, most of the online field names match the field names on the PastPerfect screens. You have the ability to change the online field name to a name of your choice. Changing these field names in PastPerfect Online allows you to better describe the contents of the field to your online visitors. In this example, the field "Object ID" will be changed to "Catalog Number" for the Object records. Each tab is customized individually.

Task

1. Click the **Customize Field Names** button.
2. Click a tab to view the selected fields for that database.
3. Click on and then highlight the name of a field you want to change in the **Your Custom Name** list. Press the **Delete** key on your keyboard.



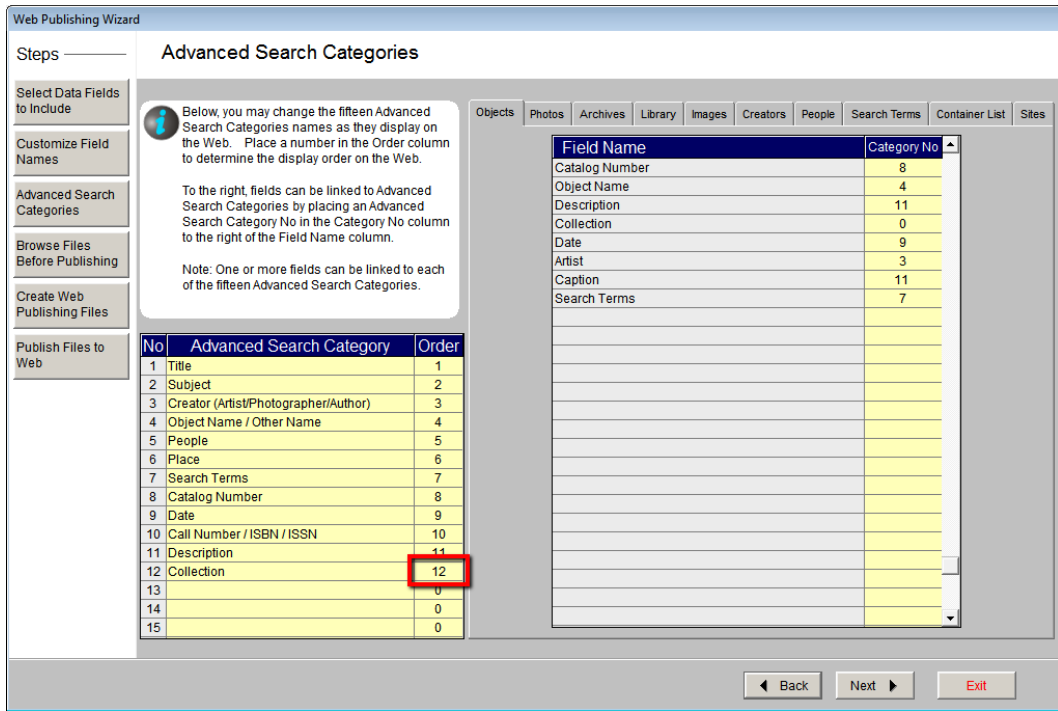
4. Type the name for this field as you want to see it online.



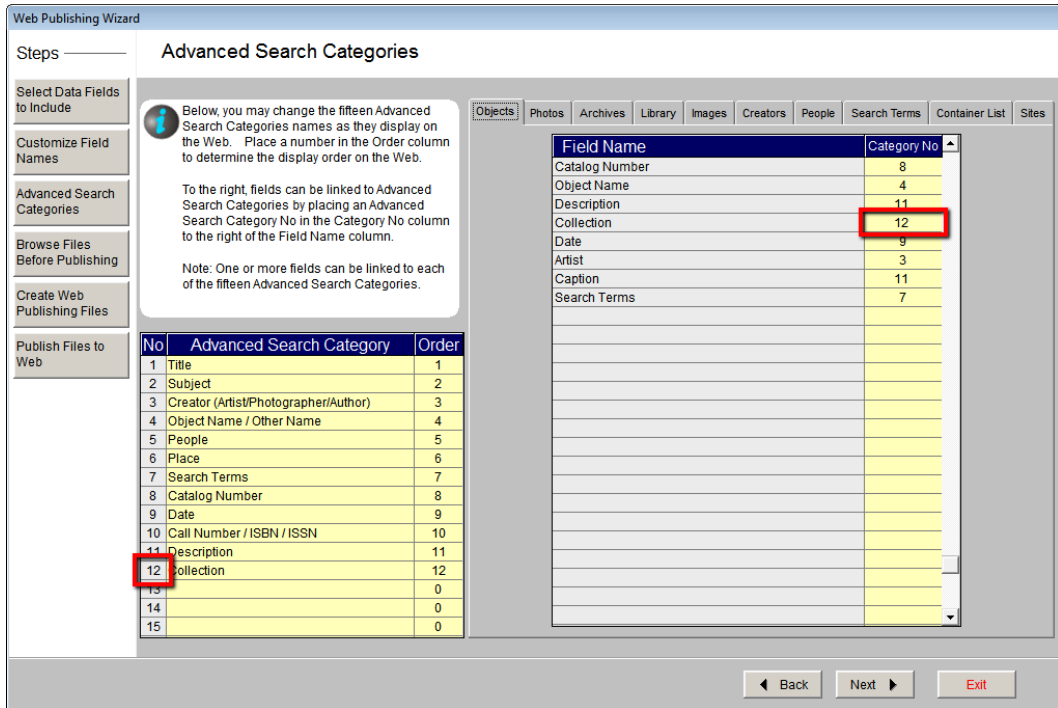
5. Repeat these steps for each tab.

Reference

- [Introduction to the Web Publishing Wizard](#)
- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- [Web Publishing Wizard - Browsing Files Before Publishing](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)
- [Web Publishing Wizard - Publishing Files to Web](#)



4. On the right, click a tab to view the selected fields from that database.
5. To link a field name to a search category, type the number from the **No** column into the **Category No.** column. You can link more than one field to a category. Fields that are not mapped to a category will display online, but will not be searchable.



6. Repeat these steps for each tab.

Reference

- [Introduction to the Web Publishing Wizard](#)
- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Customizing Field Names](#)
- [Web Publishing Wizard - Browsing Files Before Publishing](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)
- [Web Publishing Wizard - Publishing Files to Web](#)

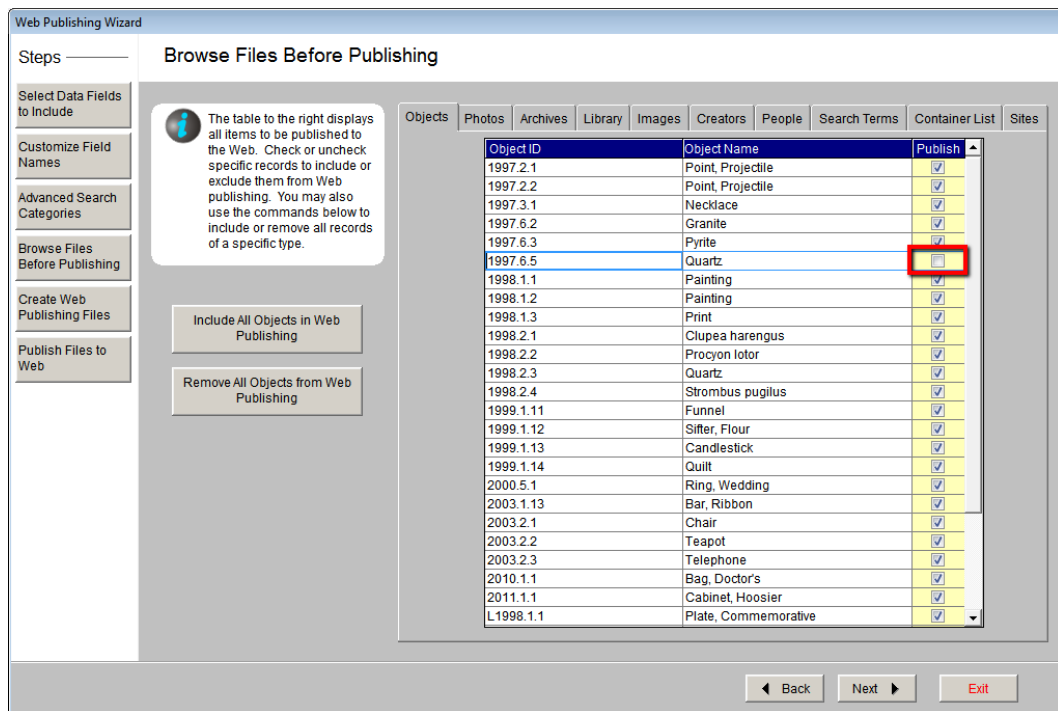
Web Publishing Wizard - Browsing Files Before Publishing

Concept

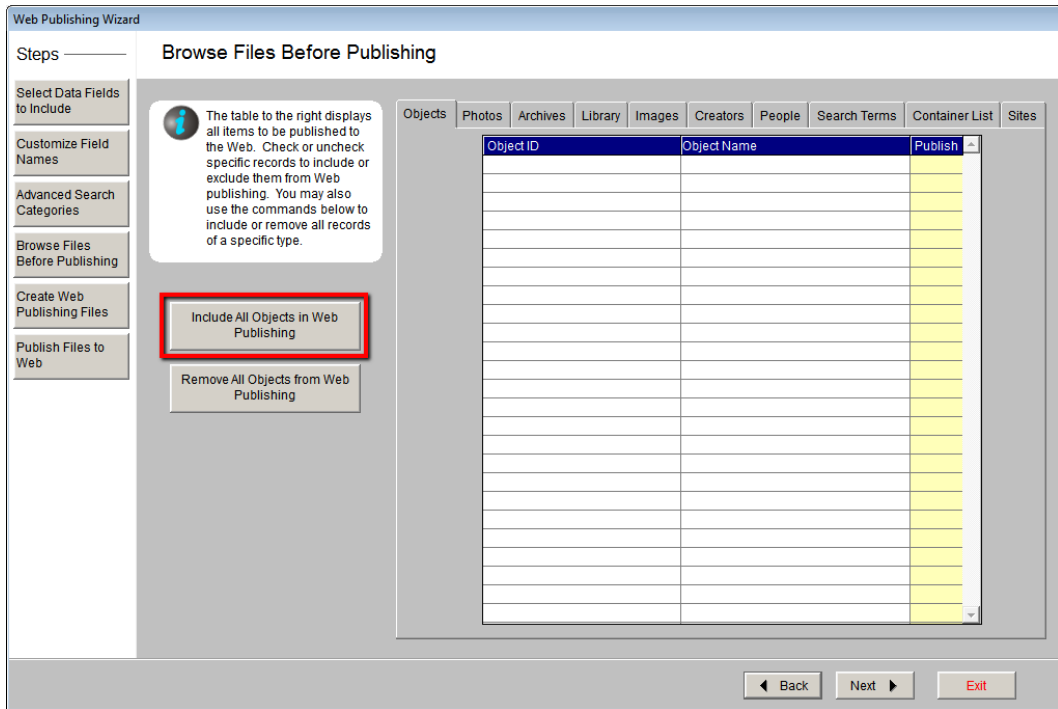
The Browse Files Before Publishing screen allows you to view which records and images have been selected for web publishing. It is intended to be a quick final check of the records that you have decided to upload to your PastPerfect Online site. From this screen you can choose to remove records individually, or use the Remove All button to deselect all records at once. You also have the ability to mark all records of a database for web publishing by using the Include All button. Use of these buttons will override all choices made previously and reset the "Include in Web Export" checkbox.

Task

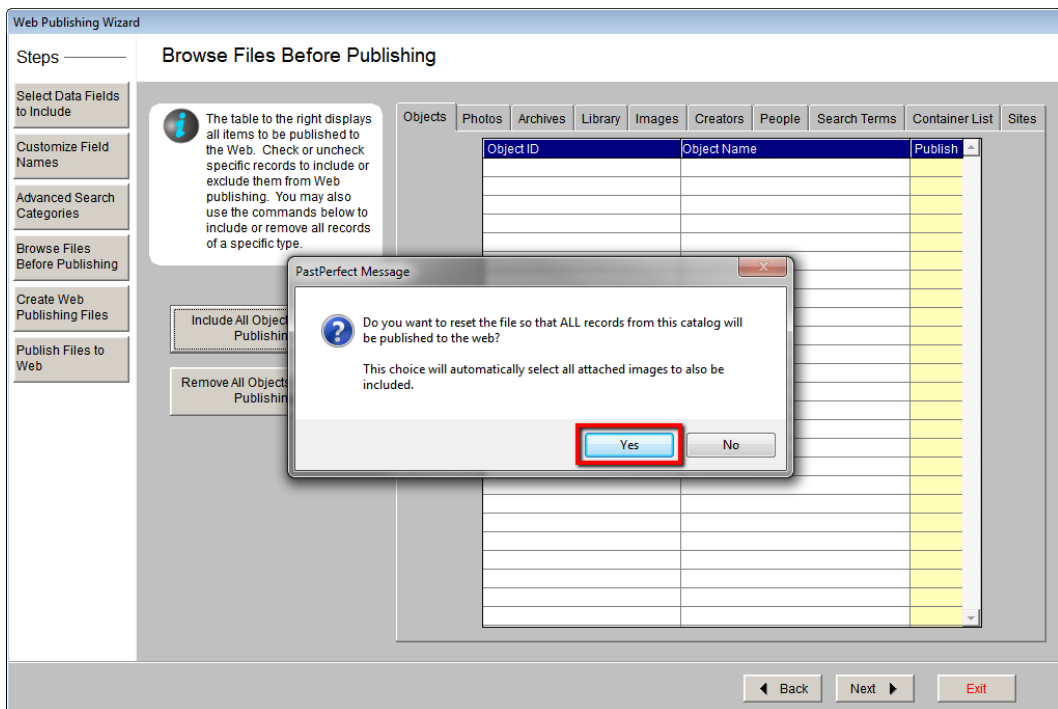
1. Click the **Browse Files Before Publishing** button.
2. Click a tab to view the selected records from that database.
3. Use the scroll bar on the right to move up or down to see the full list of records.
4. Uncheck the **Publish** check box to deselect a single record.



5. To select all records, click the **Include All Objects in Web Publishing** button.



6. Click **Yes** to confirm.



Reference

- [Introduction to the Web Publishing Wizard](#)

- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Customizing Field Names](#)
- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)
- [Web Publishing Wizard - Publishing Files to Web](#)

Web Publishing Wizard - Creating Web Publishing Files

Concept

Once you have selected your records and completed the previous steps of the Web Publishing Wizard, the next step is to create the data and images that will appear on your site. This process will create export files that only contain the records and fields you have selected to share online. The associated images will also be optimized for the Web. The process of creating data and images may take awhile depending on the number of records selected for export and the speed of your computer.

Task

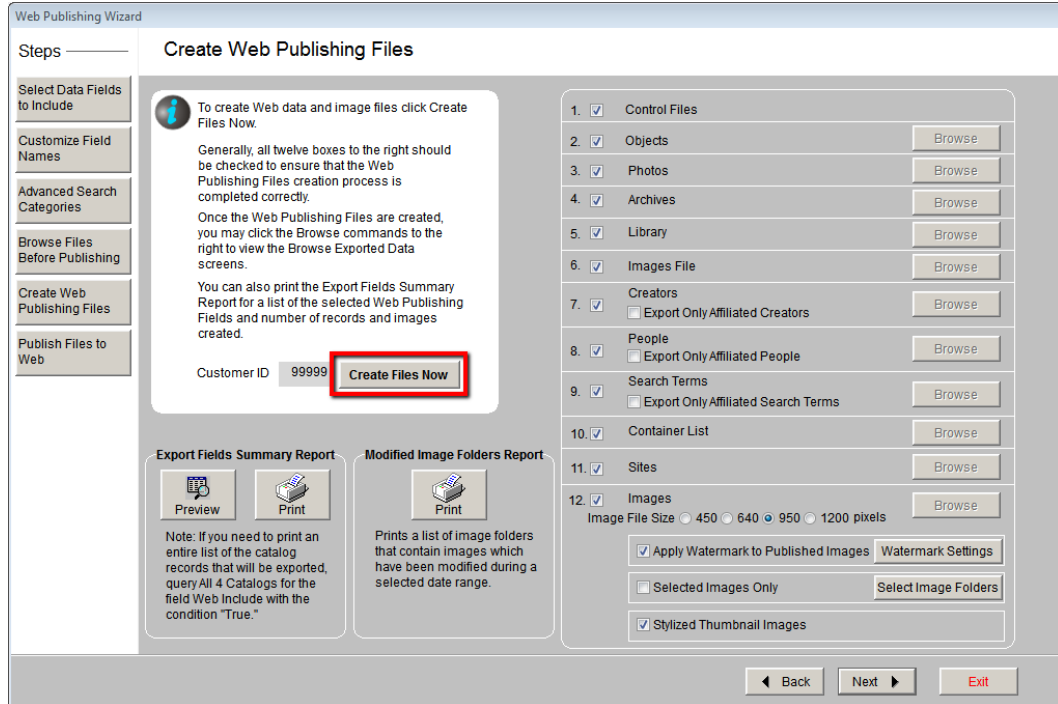
1. Click the **Create Web Publishing Files** button.
2. On the right is a list of the files that will be created. If this is the first time you are creating files on this computer, all boxes must be checked. In the Images section, there are additional choices that are referenced in the next topics. Please review the next three topics regarding image creation before proceeding.

The screenshot shows the 'Create Web Publishing Files' step of the Web Publishing Wizard. On the left, a 'Steps' sidebar lists: Select Data Fields to Include, Customize Field Names, Advanced Search Categories, Browse Files Before Publishing, Create Web Publishing Files, and Publish Files to Web. The main area contains instructions and a 'Create Files Now' button with a 'Customer ID' of 99999. A list of 12 items to be created is shown on the right, with a red box highlighting the first 12 items:

1.	<input checked="" type="checkbox"/>	Control Files	
2.	<input checked="" type="checkbox"/>	Objects	Browse
3.	<input checked="" type="checkbox"/>	Photos	Browse
4.	<input checked="" type="checkbox"/>	Archives	Browse
5.	<input checked="" type="checkbox"/>	Library	Browse
6.	<input checked="" type="checkbox"/>	Images File	Browse
7.	<input checked="" type="checkbox"/>	Creators	Browse
	<input type="checkbox"/>	Export Only Affiliated Creators	
8.	<input checked="" type="checkbox"/>	People	Browse
	<input type="checkbox"/>	Export Only Affiliated People	
9.	<input checked="" type="checkbox"/>	Search Terms	Browse
	<input type="checkbox"/>	Export Only Affiliated Search Terms	
10.	<input checked="" type="checkbox"/>	Container List	Browse
11.	<input checked="" type="checkbox"/>	Sites	Browse
12.	<input checked="" type="checkbox"/>	Images	Browse

Below the list, the 'Image File Size' is set to 950 pixels. Other options include 'Apply Watermark to Published Images' (checked), 'Selected Images Only' (unchecked), and 'Stylized Thumbnail Images' (checked). At the bottom, there are 'Back', 'Next', and 'Exit' buttons.

3. Click the **Create Files Now** button.



4. Be patient while files are being created, then follow the prompts on the screen. This process will end with a message stating "Publish files created successfully." Click **OK**.

Reference

- [Web Publishing Wizard - Selecting Image File Size](#)
- [Web Publishing Wizard - Watermark Settings](#)
- [Web Publishing Wizard - Selecting Stylized Thumbnail Images](#)
- [Introduction to the Web Publishing Wizard](#)
- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Customizing Field Names](#)
- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- [Web Publishing Wizard - Browsing Files Before Publishing](#)
- [Web Publishing Wizard - Publishing Files to Web](#)

Web Publishing Wizard - Selecting Image File Size

Concept

For each image selected for web publishing, the Web Publishing Wizard creates a thumbnail and a large image. The large image is what you see when you click on a thumbnail from a record page or Random Images. The large images are resized based on the Image File Size setting on the Create Web Publishing Files screen. A setting of 450 pixels will reduce the image size to 450 pixels on the longest side of the image. The higher the setting, the larger your images will appear on screen. Images that are smaller than the pixel setting will not be enlarged and will remain at their current size. The largest setting of 1200 pixels will export an image that will fill most browser windows.

The screenshot shows the 'Create Web Publishing Files' step of the Web Publishing Wizard. On the left, a 'Steps' sidebar lists: Select Data Fields to Include, Customize Field Names, Advanced Search Categories, Browse Files Before Publishing, Create Web Publishing Files, and Publish Files to Web. The main area contains instructions and a 'Create Files Now' button with a Customer ID of 99999. Below the instructions are two report sections: 'Export Fields Summary Report' (with Preview and Print buttons) and 'Modified Image Folders Report' (with a Print button). On the right, a list of 12 items to be published is shown, each with a checked checkbox and a 'Browse' button. Item 12, 'Images', is highlighted with a red box and includes the 'Image File Size' radio buttons, with '950' selected. Other radio buttons are '450', '640', and '1200 pixels'. Below the list are checkboxes for 'Apply Watermark to Published Images' (checked), 'Selected Images Only', and 'Stylized Thumbnail Images' (checked). At the bottom are 'Back', 'Next', and 'Exit' buttons.

Reference

- [Web Publishing Wizard - Watermark Settings](#)
- [Web Publishing Wizard - Selecting Stylized Thumbnail Images](#)
- [Introduction to the Web Publishing Wizard](#)
- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Customizing Field Names](#)
- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- [Web Publishing Wizard - Browsing Files Before Publishing](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)
- [Web Publishing Wizard - Publishing Files to Web](#)

Web Publishing Wizard - Selecting Stylized Thumbnail Images

Concept

For each image selected for web publishing, the Web Publishing Wizard creates a thumbnail and a large image. Thumbnail images display on catalog records, search results, and Random Images. When you have selected "Stylized Thumbnail Images" only the thumbnail images will be cropped, making them a consistent shape without creating image distortion. You'll need to select Stylized Thumbnail Images when you want thumbnails to display as Circles, Squares or Rounded Squares. Thumbnail image style is selected on the Site tab of the Interface Management Site; examples of the three stylized options and native option are below.



Note: If you do not select Stylized Thumbnail Images when creating files but select one of the stylized formats in IMS, the images on your site may appear off-center. Please be sure that if you want stylized images on your site you include a check next to "Stylized Thumbnail Images" when creating your images.

Reference

- [Web Publishing Wizard - Selecting Image File Size](#)
- [Web Publishing Wizard - Watermark Settings](#)
- [Introduction to the Web Publishing Wizard](#)
- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Customizing Field Names](#)
- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- [Web Publishing Wizard - Browsing Files Before Publishing](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)
- [Web Publishing Wizard - Publishing Files to Web](#)

Web Publishing Wizard - Watermark Settings

Concept

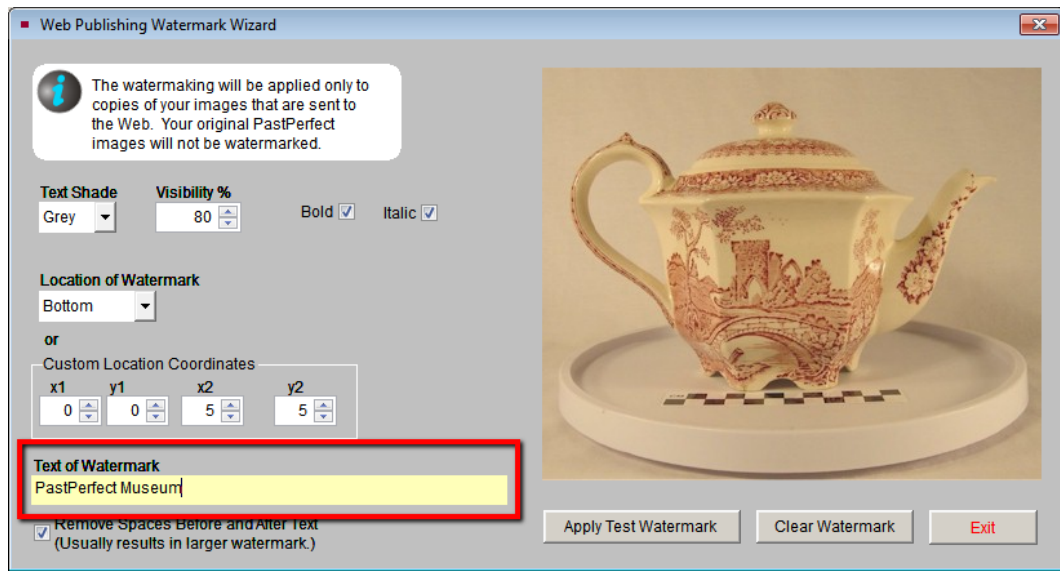
On the Create Web Publishing Files screen, you have the option to apply a watermark to the large images that are uploaded to your PastPerfect Online site. You determine the text, size, and position of the watermark. The original images attached to your PastPerfect records are not affected by this process. Please note, if you already have watermarked images in PastPerfect, applying the PPO watermark will result in a second watermark on those web images.

Task

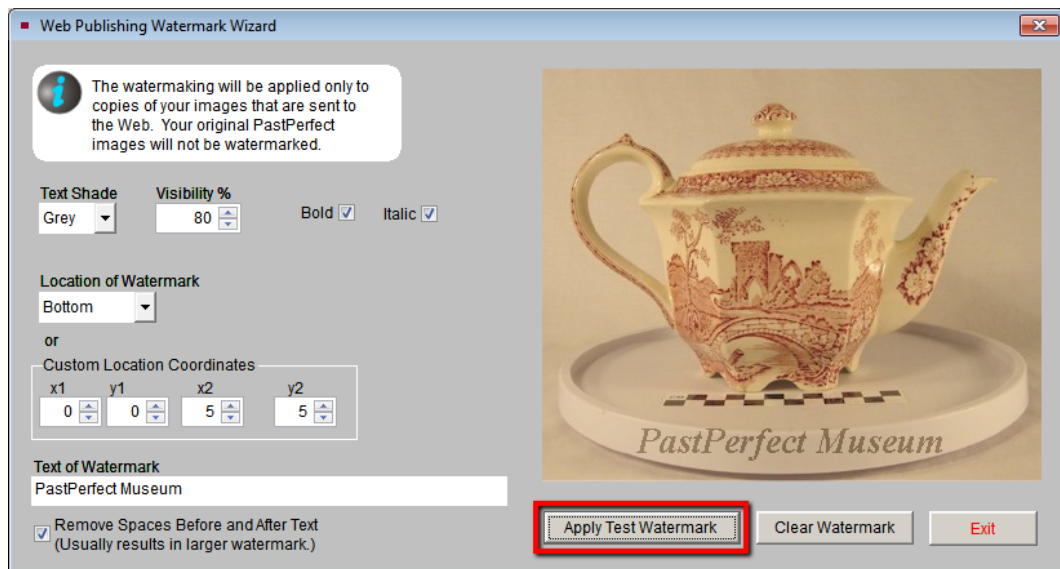
1. Click the **Watermark Settings** button.

The screenshot shows the 'Web Publishing Wizard' interface for the 'Create Web Publishing Files' step. On the left is a navigation pane with steps: Select Data Fields to Include, Customize Field Names, Advanced Search Categories, Browse Files Before Publishing, Create Web Publishing Files, and Publish Files to Web. The main area contains instructions and a 'Create Files Now' button with a Customer ID of 99999. Below are sections for 'Export Fields Summary Report' and 'Modified Image Folders Report'. On the right, a list of 12 items is shown, each with a 'Browse' button. Item 12, 'Images', is selected, and its options include 'Image File Size' (450, 640, 950, 1200 pixels), 'Apply Watermark to Published Images' (checked), 'Selected Images Only', and 'Stylized Thumbnail Images'. The 'Watermark Settings' button is highlighted with a red box. At the bottom are 'Back', 'Next', and 'Exit' buttons.

2. Type the text of your choice in the **Text of Watermark** field. The watermark will be the same for all images.



3. Click the **Apply Test Watermark** button to see the watermark appear on the test image. If you want to adjust the watermark, click **Clear Watermark**, make changes, then click **Apply Test Watermark** again.



4. When you are satisfied with the watermark, click **Exit**.

5. Check the **Apply Watermark to Publishing Images** box.

Web Publishing Wizard

Steps ———

Create Web Publishing Files

Select Data Fields to Include

Customize Field Names

Advanced Search Categories

Browse Files Before Publishing

Create Web Publishing Files

Publish Files to Web

To create Web data and image files click Create Files Now.

Generally, all twelve boxes to the right should be checked to ensure that the Web Publishing Files creation process is completed correctly.

Once the Web Publishing Files are created, you may click the Browse commands to the right to view the Browse Exported Data screens.

You can also print the Export Fields Summary Report for a list of the selected Web Publishing Fields and number of records and images created.

Customer ID 99999 **Create Files Now**

Export Fields Summary Report

Preview Print

Note: If you need to print an entire list of the catalog records that will be exported, query All 4 Catalogs for the field Web Include with the condition "True."

Modified Image Folders Report

Print

Prints a list of image folders that contain images which have been modified during a selected date range.

1. Control Files

2. Objects **Browse**

3. Photos **Browse**

4. Archives **Browse**

5. Library **Browse**

6. Images File **Browse**

7. Creators **Browse**
 Export Only Affiliated Creators

8. People **Browse**
 Export Only Affiliated People

9. Search Terms **Browse**
 Export Only Affiliated Search Terms

10. Container List **Browse**

11. Sites **Browse**

12. Images **Browse**
Image File Size 450 640 950 1200 pixels

Apply Watermark to Published Images **Watermark Settings**

Selected Images Only **Select Image Folders**

Stylized Thumbnail Images

◀ Back Next ▶ **Exit**

Reference

- [Web Publishing Wizard - Selecting Image File Size](#)
- [Web Publishing Wizard - Selecting Stylized Thumbnail Images](#)
- [Introduction to the Web Publishing Wizard](#)
- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Customizing Field Names](#)
- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- [Web Publishing Wizard - Browsing Files Before Publishing](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)
- [Web Publishing Wizard - Publishing Files to Web](#)

Web Publishing Wizard - Publishing Files to the Web

Concept

After files have been created successfully, the final step is to upload your data and images to the PastPerfect Online servers. Upload times depend largely on the size of your upload and the speed of your internet connection. Once the upload is complete, it usually takes less than one hour for your records to appear online.

Task

1. Click the **Publish Files to Web** button.
2. Click the **Upload Data and Images to Website** button.

Web Publishing Wizard

Steps ——— Publish Files to Web - PPOL2

Select Data Fields to Include

Customize Field Names

Advanced Search Categories

Browse Files Before Publishing

Create Web Publishing Files

Publish Files to Web

Once all Web Publishing Files are created, upload them to the Web server using HTTP file transfer.
Select file types to upload, and click Upload to Website Now to start the transfer.

Local Folder C:\PP5WebExport Upload data URL http://pastperfectonline.com/dataupload

Upload Images URL http://pastperfectonline.com/imageupload

Upload Host pastperfectonline.com

Hosting URL (used for printing QRcode labels) http://demo.pastperfectonline.com/

Select Files to Upload:

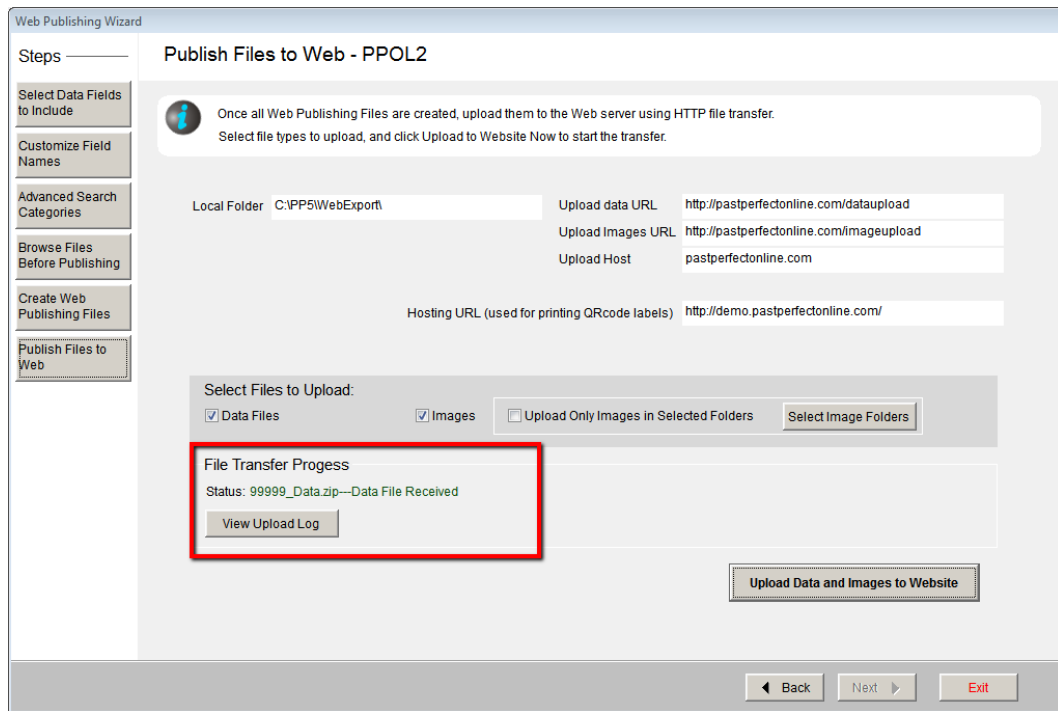
Data Files Images Upload Only Images in Selected Folders

File Transfer Progress

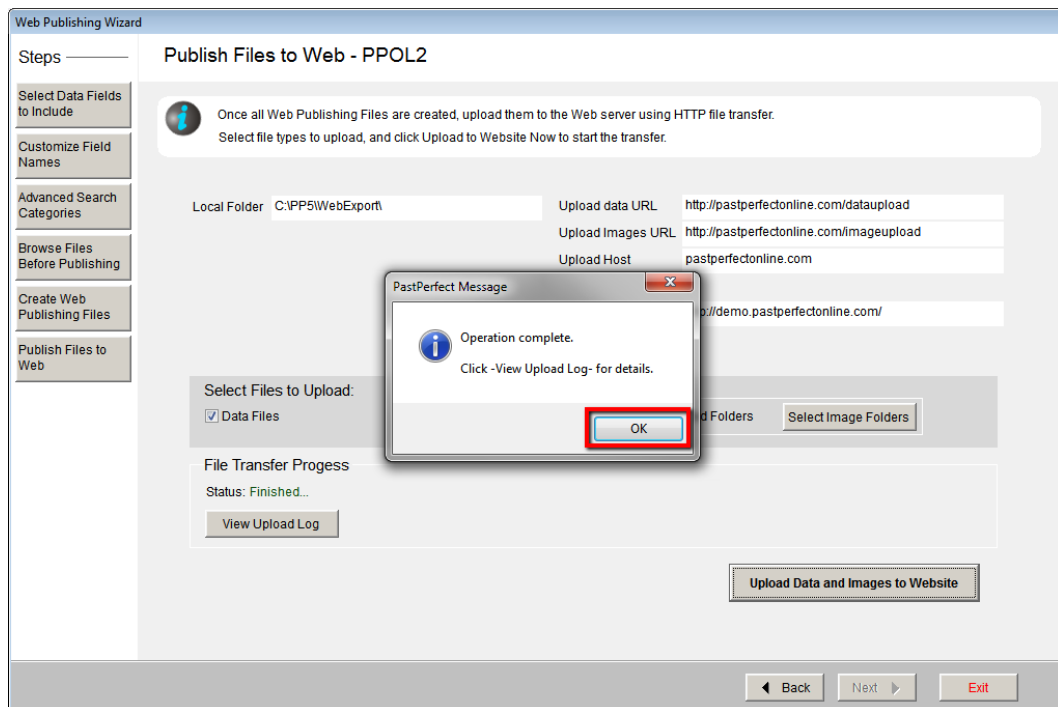
Status:

◀ Back Next ▶

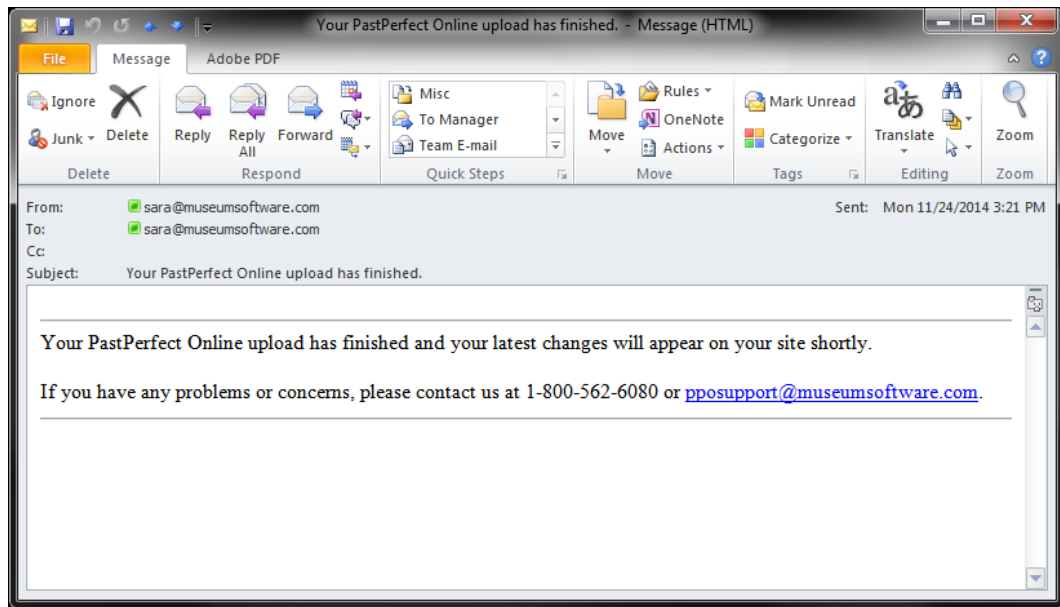
3. As files are uploading, you will see the Status change under File Transfer Progress.



4. When the operation is complete, click **OK**.



5. Shortly after the upload is complete, you will receive an email letting you know the upload was successful. Changes to your site are usually visible within the next hour.



Reference

- [Introduction to the Web Publishing Wizard](#)
- [Web Publishing Wizard - Selecting Data Fields](#)
- [Web Publishing Wizard - Customizing Field Names](#)
- [Web Publishing Wizard - Setting Up Advanced Search Categories](#)
- [Web Publishing Wizard - Browsing Files Before Publishing](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)

Web Publishing Wizard - Creating Selected Images Only

Concept

The Selected Images Only option, found on the Create Web Publishing Files and the Publish Files to Web screens, allows you to choose which image subfolders are created and uploaded. Being able to create just selected image folders can greatly reduce the amount of time it takes to complete the Create Files process and Upload Files process.

For most clients, after your first upload, you won't have to create and upload all of the images again. PastPerfect is designed to put all newly attached images into the most recent (highest numbered) subfolder. For example, if you have folders 001 through 019, your newest images should be in folders 018 and 019. Images in the lower numbered folders (001, 002, etc) are unlikely to change.

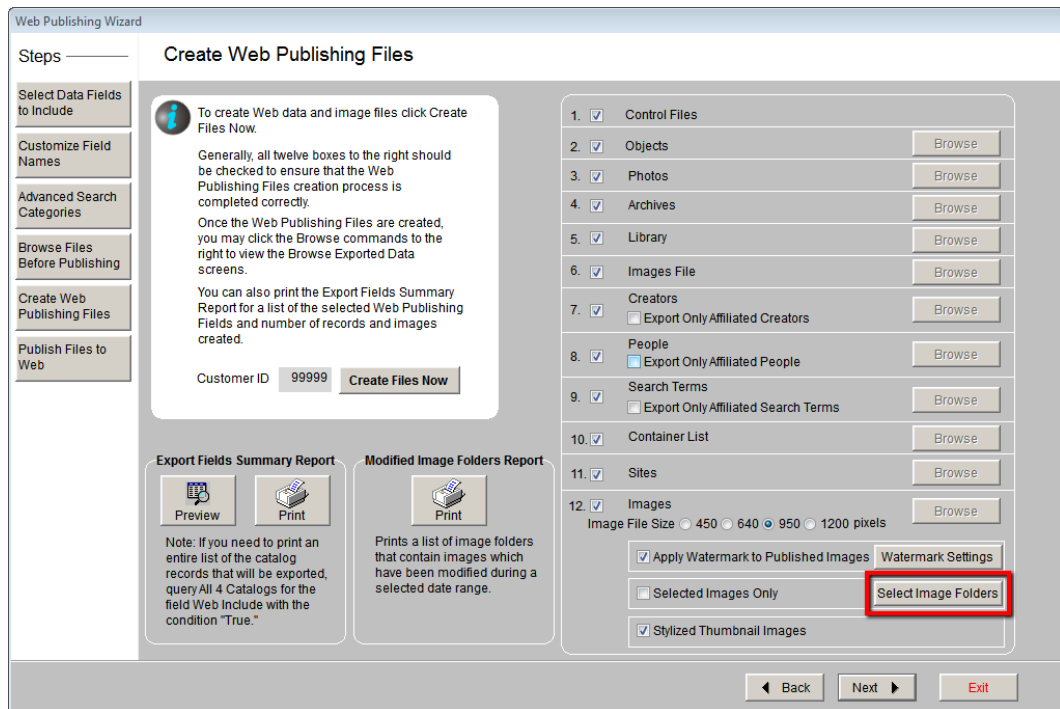
There are a few scenarios where selecting only your most recent image folders will not work well. In these cases, you will want to create all images:

- If this is your first upload.
- If you have recently selected older catalog records with images to be included in the web export for the first time.
- If you want to add or change selections affecting your images (watermark, image file size, or stylized/unstylized thumbnails).

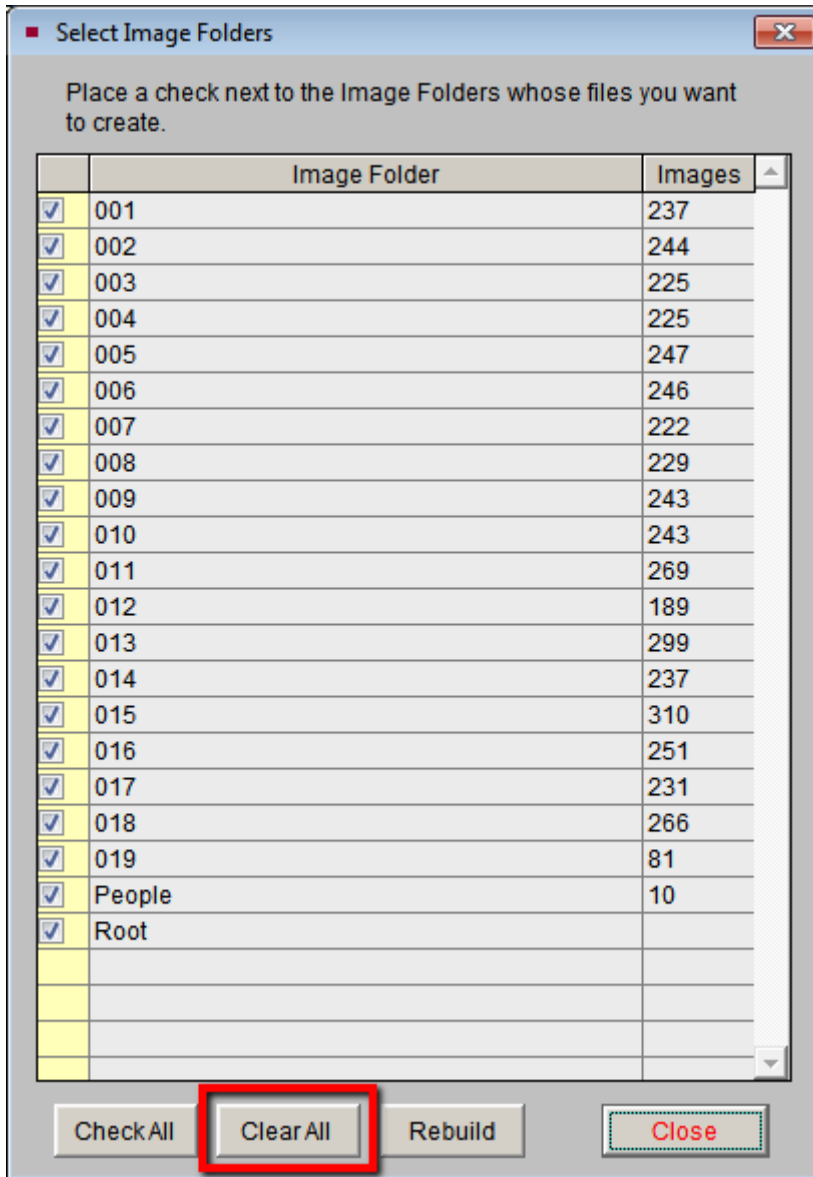
If you have questions about whether you should use the Selected Images Only option, please contact us.

Task

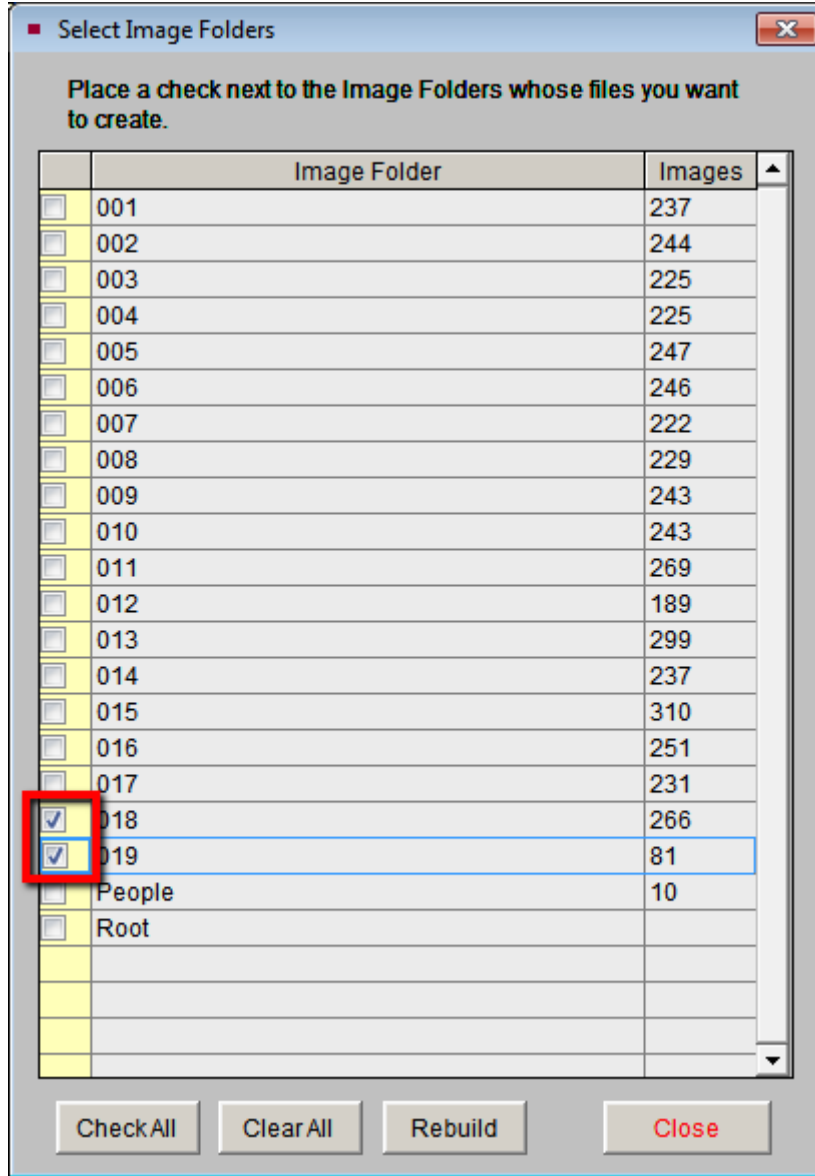
1. From the Create Web Publishing Files screen, click the **Select Image Folders** button.



2. Click the **Clear All** button to uncheck the check boxes to the left of each Image Folder.



3. Check the box next to the folders you want to create.

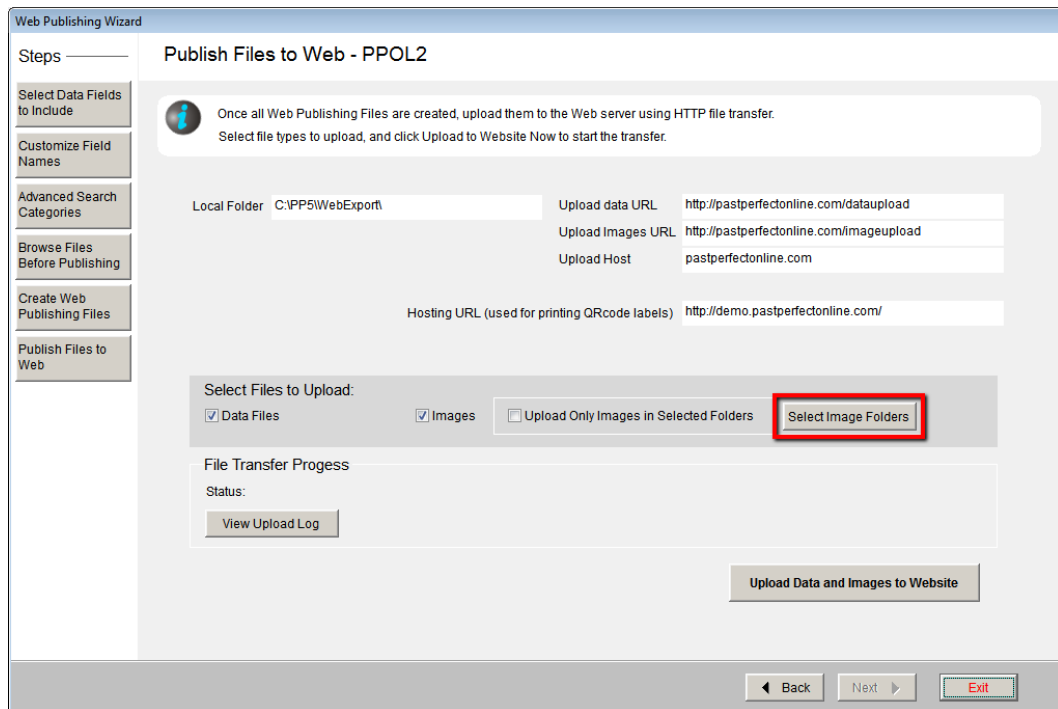


4. Click the **Close** button.

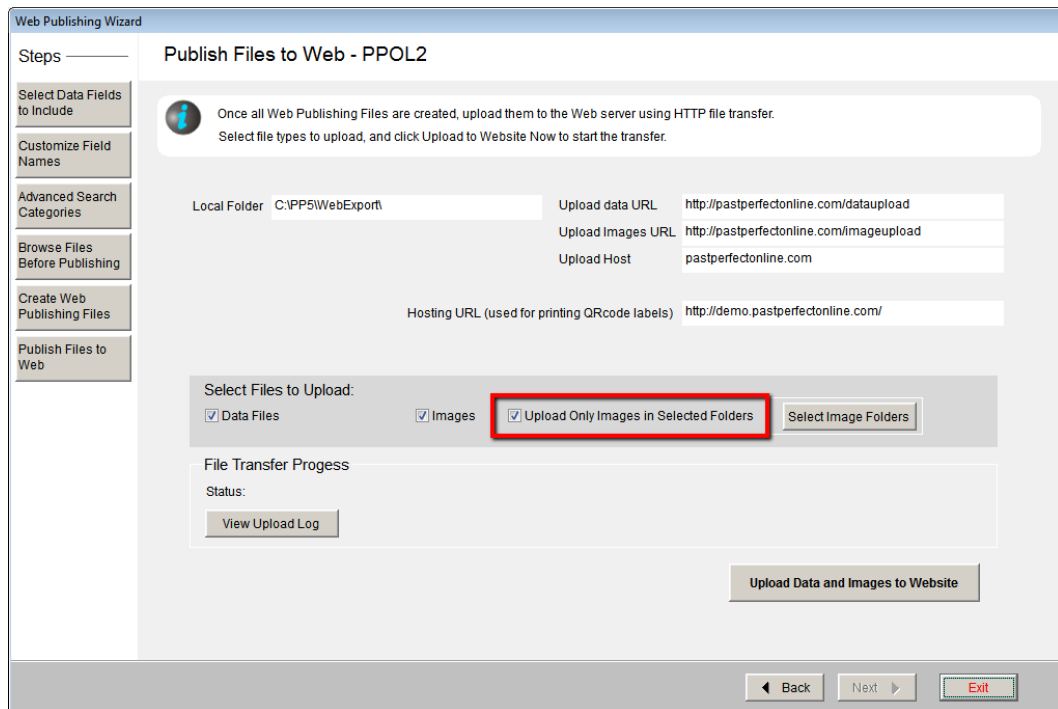
- Put a check in the **Selected Images Only** check box.

The screenshot shows the 'Web Publishing Wizard' interface at the 'Create Web Publishing Files' step. On the left, a 'Steps' sidebar lists various stages, with 'Create Web Publishing Files' currently selected. The main area contains instructions and a list of 12 items to be checked for creation. A red box highlights the 'Selected Images Only' checkbox under the 'Images' section. Other options include 'Apply Watermark to Published Images', 'Stylized Thumbnail Images', and 'Watermark Settings'. At the bottom, there are 'Back', 'Next', and 'Exit' buttons.

- Click the **Create Files Now** button.
- Once files have been created, click **OK** on the message that appears and then click **Next** at the bottom of the screen.
- On the Publish Files to Web screen, click the **Select Image Folders** button.



9. Click the **Clear All** button.
10. Check the box next to the folders you want to upload. These should be the same folders you created.
11. Click the **Close** button.
12. Check the **Upload Only Images in Selected Folders** box.



13. Click the **Upload Data and Images to Website** button.
14. Once the upload completes, click **OK**.

Reference

- [Introduction to the Web Publishing Wizard](#)
- [Web Publishing Wizard - Creating Web Publishing Files](#)
- [Web Publishing Wizard - Publishing Files to Web](#)

Customizing Your Site

Design Recommendations

Concept

When designing your PastPerfect Online site there are several items to keep in mind to help your online visitors get the most from your site.

- **Highlight the content, not the design.** Online visitors will be coming to your PastPerfect Online site to explore your collections. Your data and images should be the focus, while your site design should play a supporting role to your records. Having a poorly designed or overly complex site may make your site less effective.
- **Maintain continuity between your main website and your PastPerfect Online site.** Use the same logo and maintain a similar color scheme on both sites. Where possible, use comparable fonts and similar layouts to make your PastPerfect Online site complement your main website. While not every aspect of your PastPerfect Online site will match every page and feature of your organization's main website, your goal is to make the transition as seamless as possible.
- **Visit your site from the visitor's perspective.** While you are working on site design, view your site with different browsers, using multiple computers and mobile devices. What looks great on one computer might look different on another. You cannot control what hardware and software your online visitors will use, so be sure your design choices work well across multiple platforms.
- **Clearly state who you are and provide contact information.** If online visitors have questions about your site, they will likely want to contact you. The most common place to put contact information is the page footer. Remember to include your phone number, email and physical address along with your social media and website links.
- **Be sure to provide a link to your main website.** There are several different places you can have this link: make your logo a clickable link, list your URL in your footer, have a hyperlink on your Landing Page, etc. You can always make these links open in a separate tab/window so that online visitors don't have to leave your PastPerfect Online site.

References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Interface Management Site - Changing Site Logo](#)
- [Interface Management Site - Header/Footer Tab](#)
- [Interface Management Site - Customizing Your Landing Page](#)

HTML Basics

Concept

HTML is Hyper Text Markup Language and can help you alter the appearance of text and many other aspects of your web pages. There are shelves of books and countless web pages dedicated to styling with HTML. This document is meant to serve as a basic reference.

HTML uses what are called "tags" to turn features on and off. These tags are noted by inserting the appropriate code between the < > symbols. Tags define special elements and attributes of text, lines, tables, and images. Two sets of tags are needed for each special element or attribute: an opening tag and a closing tag. For instance, <i> will turn on the italics, and </i> will turn it off. Whatever text you want in italics needs to be between the two tags.

HTML tags should be all lowercase. There is no priority of attributes when adding multiple tags to the same string of text, though good practice is to follow the "first one in, last one out" rule. Example: <i><u>this is the text</u></i>

HTML does not recognize the Enter key on your keyboard or multiple spaces. Use of line breaks
 paragraphs <p> and non-breaking spaces can help achieve the same results.

Examples

- **Bold**

Bold text

Result: **Bold text**

- **Italics**

<i>Italicize text</i>

Result: *Italicize text*

- **Underline**

<u>Underline text</u>

Result: Underline text

- **Combining Elements**

<u><i>Multiple formats</i></u>

Result: ***Multiple formats***

- **Heading 1**

Your Heading 1 text will be the largest text on the page. It should be used for your largest headings.

`<h1>Welcome to Our Museum</h1>`

Result:

Welcome to Our Museum

- **Headings 2 and 3**

Headings 2 and 3 will be used for additional headings, each one decreasing in size.

`<h2>Search Tips</h2> <h3>Next Level Down</h3>`

Result:

Search Tips

Next Level Down

- **Paragraphs**

All paragraphs should be between an opening `<p>` tag and a closing `</p>` tag.

`<p>Paragraph 1</p><p>Paragraph 2</p>`

Result:

Paragraph 1

Paragraph 2

- **Line Breaks**

Line Breaks `
` (note: you don't need a closing tag for this one) simply go to the next line instead of creating a new paragraph. Notice the difference is spacing.

I need a `
` break here.

Result:

I need a
break here.

- **Create a link to a website:**

Replace the red text with your website's URL. Replace the bolded text with the words you would like to be the link.

`PastPerfect's Home Page`

Result: [PastPerfect's Home Page](#)

- **Create a link to an email address:**

Replace the red text with your email address. Replace the bolded text with the words you would like to be the link.

```
<a href="mailto:pposupport@museumsoftware.com">Email Me!</a>
```

Result: [Email Me!](#)

References

- [Interface Management Site - Header/Footer Tab](#)
- [Interface Management Site - Customizing Your Landing Page](#)
- [Interface Management Site - Enabling and Customizing the Feedback Form](#)
- [Interface Management Site - Enabling and Customizing the Image Request Form](#)
- [Interface Management Site - Enabling and Customizing the Email A Friend Form](#)

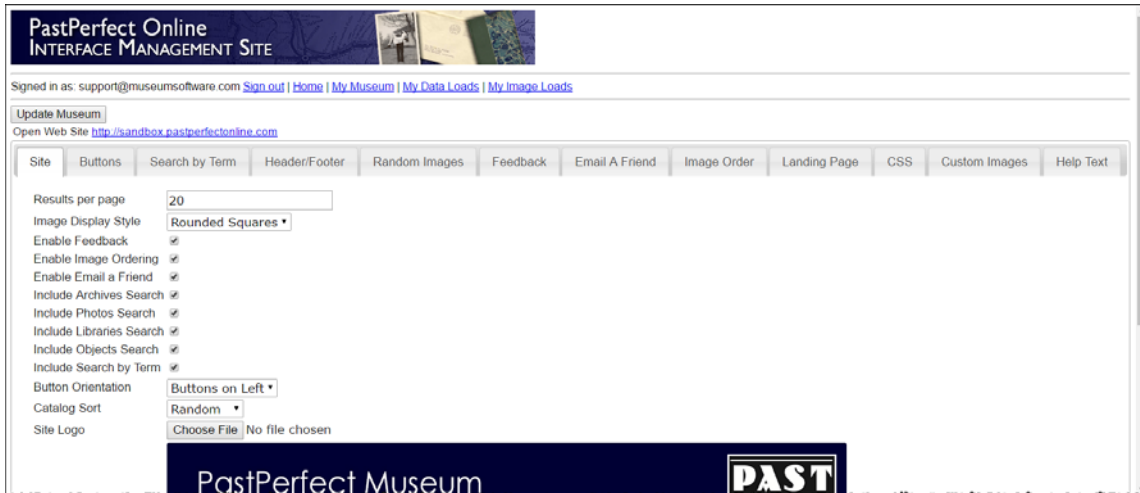
Introduction to the Interface Management Site (IMS)

Concept

The Interface Management Site (IMS) is a website where you can make design and functionality changes to your PastPerfect Online site. You can enable optional features, select a layout, modify footer text, upload your logo, add custom CSS, and more. Changes made in IMS will take effect immediately, though to view those changes on the website, you may need to follow the instructions in the [Making IMS Changes and Refreshing Your Site](#) topic.

Here is a quick summary of the tabs and functions available within IMS:

- The **Site** tab contains options for which buttons appear on your site, button orientation, and image display choices. This is also the tab where you can upload your logo image.
- The **Buttons** tab allows you to rename the navigational buttons on your site. You can also have the option to include a custom button that links to an external site.
- The **Search by Term** tab contains options for which categories appear on your Search by Term page.
- The **Header/Footer** tab allows you to add text and HTML code into the header and footer sections of your site.
- The **Random Images** tab includes selections for your Random Images page.
- The **Feedback** tab allows you to customize features of the Feedback Form.
- On the **Email A Friend** tab, you can customize features of the Email A Friend Form.
- The **Image Order** tab allows you to customize features of the Image Request Form.
- The **Landing Page** tab is where you can enter text and HTML code for your Landing Page.
- On the **CSS** tab you can enter custom CSS for your site if you are familiar with CSS.
- On the **Custom Images** tab you can upload up to 12 images to use on your site.
- On the **Help Text** tab you can enter custom help text for each of the search pages on your site.



References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Understanding Your Welcome Letter](#)
- [Interface Management Site - Site Tab](#)
- Interface Management Site - Buttons Tab
- Interface Management Site - Search by Term Tab
- [Interface Management Site - Header/Footer Tab](#)
- [Interface Management Site - Random Images Tab](#)
- [Interface Management Site - Enabling and Customizing the Feedback Form](#)
- [Interface Management Site - Enabling and Customizing the Email A Friend Form](#)
- [Interface Management Site - Enabling and Customizing the Image Request Form](#)
- [Interface Management Site - Customizing Your Landing Page](#)
- [Interface Management Site - CSS Tab](#)
- Interface Management Site - Custom Images Tab
- Interface Management Site - Help Text Tab

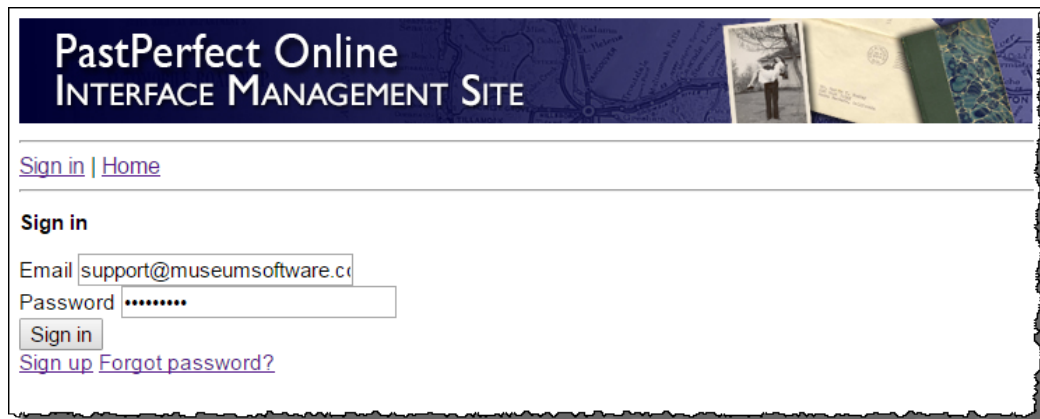
Accessing Your Interface Management Site (IMS)

Concept

To modify the design of your site, you will need to have access to the Interface Management Site (IMS). Access to IMS is only available to the Museum Manager. Once logged in, there are simple and advanced functions for customizing the look of your PastPerfect Online site.

Task

1. Go to <http://admin.pastperfectonline.com>.
2. Click the **Sign in** link.
3. Enter your **Museum Manager Email** and **Password** as listed on your PPO Welcome Letter, then click **Sign In**.



References

- [Introduction to the Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Understanding Your Welcome Letter](#)
- [Interface Management Site - Site Tab](#)
- [Interface Management Site - Buttons Tab](#)
- [Interface Management Site - Search by Term Tab](#)
- [Interface Management Site - Header/Footer Tab](#)
- [Interface Management Site - Random Images Tab](#)
- [Interface Management Site - Enabling and Customizing the Feedback Form](#)
- [Interface Management Site - Enabling and Customizing the Email A Friend Form](#)
- [Interface Management Site - Enabling and Customizing the Image Request Form](#)
- [Interface Management Site - Customizing Your Landing Page](#)
- [Interface Management Site - CSS Tab](#)

- Interface Management Site - Custom Images Tab
- Interface Management Site - Help Text Tab

Making IMS Changes and Refreshing Your Site

Concept

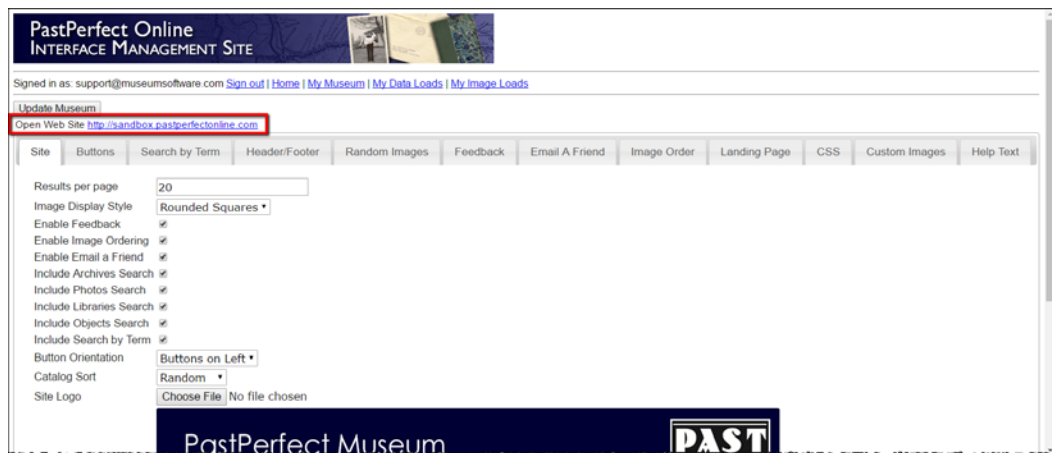
Any change made in the Interface Management Site (IMS) takes effect immediately. However, to ensure you are seeing these changes in your browser, you must be sure to complete one of the options below to refresh your site. Both options accomplish the same task, but you may feel that one is easier than the other.

Task

Option 1: Use Open Web Site Link in IMS

This option will be helpful if you have just made changes in IMS and are still signed in.

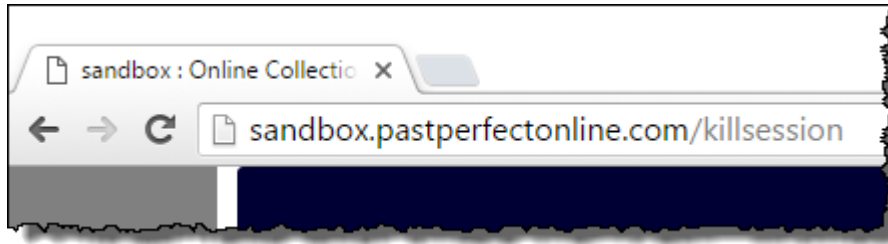
1. After you make a change in IMS, click the **Update Museum** button at the top or bottom of your page.
2. Click the Open Web Site link at the top of your page. This will open your PPO site in another tab or window displaying your recent changes.



Option 2: Use /killsession

This option will be useful if you need to refresh your website and are not logged into IMS.

1. In a web browser, go to your **PPO Site Address** as listed on your PPO Welcome Letter.
2. Add this additional text to the end of your URL: **/killsession**
 - o As an example: <http://sandbox.pastperfectonline.com/killsession>



3. Press the **Enter** key on your keyboard. The browser will refresh back to the landing page and display your latest IMS changes.

References

- [Introduction to the Interface Management Site \(IMS\)](#)
- [Accessing Your Interface Management Site \(IMS\)](#)

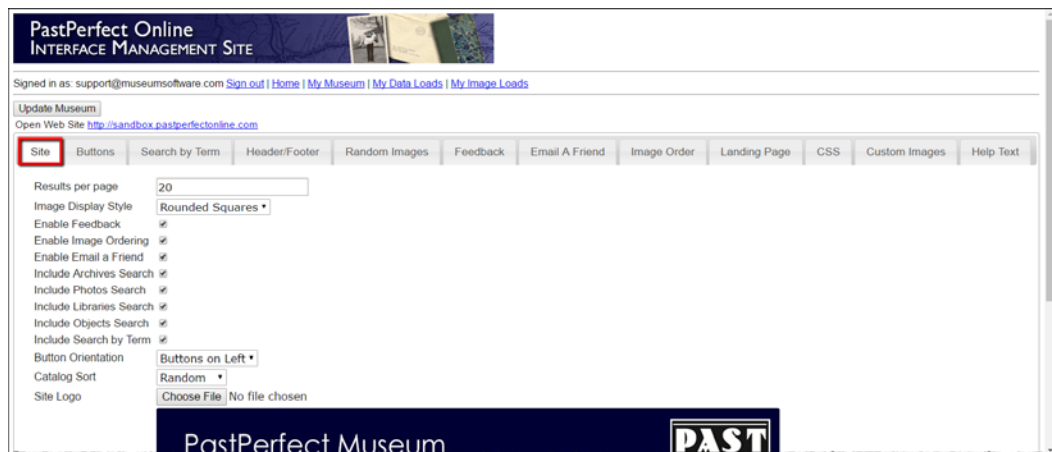
Interface Management Site - Site Tab

Concept

Within the Interface Management Site, the Site tab allows you to make choices regarding the appearance of your PastPerfect Online site. You can upload your logo, enable optional features, select image display style and choose button orientation. By default the following features are enabled: Enable Feedback, Enable Image Ordering, Enable Email a Friend, Include Archives Search, Include Photos Search, Include Libraries Search, Include Objects Search.

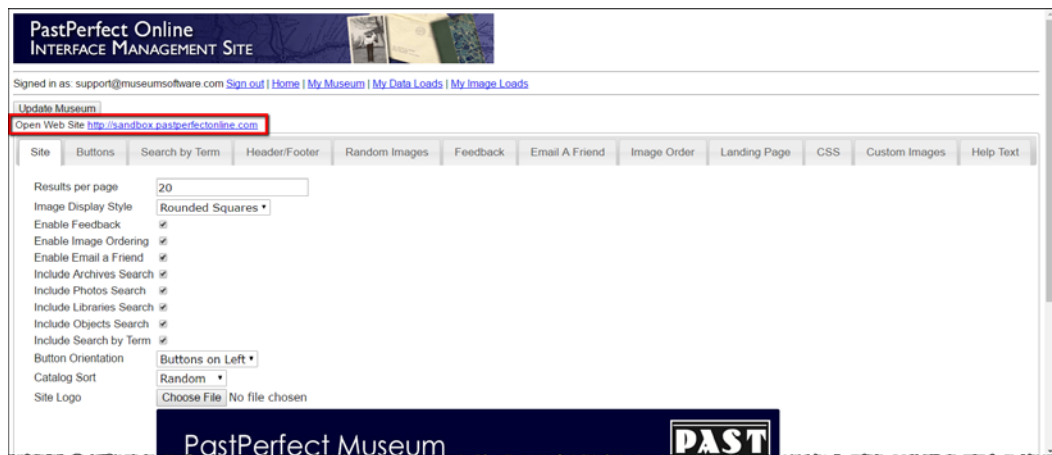
Task

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **Site** tab.



3. Make changes to any of following fields:
 - **Results per page** - Type in the maximum number of records to be displayed on each page of your search results.
 - **Image Display Style** - Using the dropdown list, select the display style for your thumbnail images.
 - **Enable Feedback** - Check this box if you want to include the Feedback Form on your record pages for online visitors to send you feedback. Please note, you will also need to provide your email address on the Feedback tab.
 - **Enable Image Ordering** - Check this box if you want to include the Image Request Form on your record pages for online visitors to request specific images. Please note, you will also need to provide your email address on the Image Order tab.
 - **Enable Email a Friend** - Check this box if you want to include the Email A Friend button on your record pages.
 - **Include Archives/Photos/Libraries/Objects Search** - Select which catalog buttons you want to appear on your site for catalog specific searches and Advanced Search results.

- **Include Search by Term** - Check this box if you want to include Search by Term on your site. Please note, you will also need to make selections on the Search by Term tab to fully enable this feature.
 - **Button Orientation** - Using the dropdown list, choose whether you want the navigational buttons to appear along the top of your site or along the left side.
 - **Site Logo** - Click the **Choose File** button to select and upload the logo image you want to appear at the top of your site.
 - **Missing Image Override** - Click the **Choose File** button to select and upload an image to display for records that have no associated image.
 - **Clear Image** - Check this box to remove the image you've uploaded as your Missing Image Override.
4. Once you have made your selections, click the **Update Museum** button at the top or bottom of your page to save the changes.
 5. Click your Open Web Site link at the top of your page to view your changes.



References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- Interface Management Site - Image Display Style and Button Orientation
- Interface Management Site - Changing Site Logo
- Interface Management Site - Uploading a Missing Images Override Image

Interface Management Site - Header/Footer Tab

Concept

The Header/Footer tab within the Interface Management Site gives you the ability to modify the header and footer sections of your PastPerfect Online site. When these fields are populated, they will appear on all pages of your site. In both fields, you can add plain text or text marked up in HTML.

For the header, many organizations do not add additional text. However, one common option is to add HTML code to make your logo a clickable link back to the home page of your organization's website.

The footer section can be used for a variety of purposes. You might want to include your organization's contact information, museum hours, featured thumbnail images, copyright statements, or donor/sponsor acknowledgements. If you choose to use Google Analytics, you will need to put that HTML code into the footer. More information about Google Analytics can be found in the Reference section.

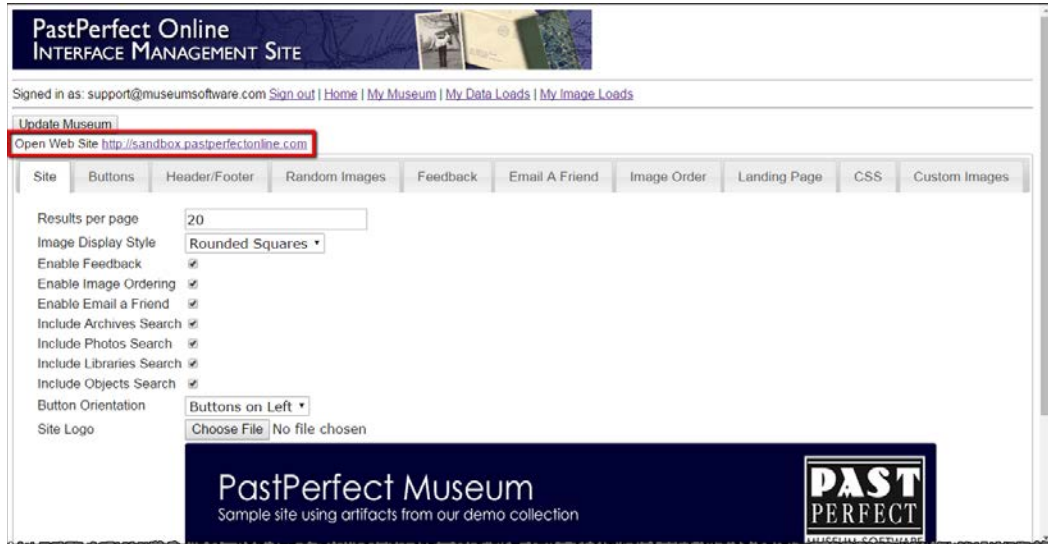
Task

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **Header/Footer** tab.



3. Edit any of the fields listed below:
 - **Hide Header Image** - This check box is available so that you can make your logo a clickable link. Hide the default header and enter the HTML manually to display the logo and make it a hyperlink.
 - **Header Text** - You can fill in this section with plain text or HTML. It will appear at the top of your site.
 - **Footer Text** - You can fill in this section with plain text or HTML. It will appear at the bottom of your site.

4. Once you have made your changes, click the **Update Museum** button at the top or bottom of your page to save the changes.
5. Click your Open Web Site link at the top of your page to view your changes.



References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [HTML Basics](#)
- [Adding Google Analytics to Your PastPerfect Online Records](#)

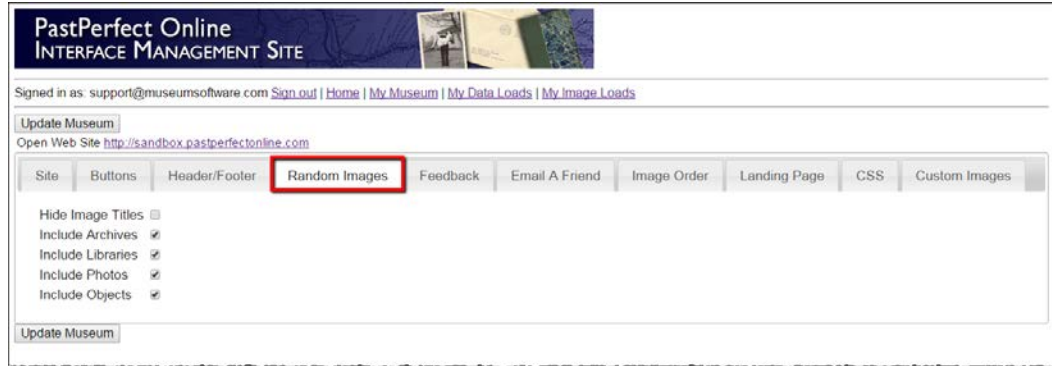
Interface Management Site - Random Images Tab

Concept

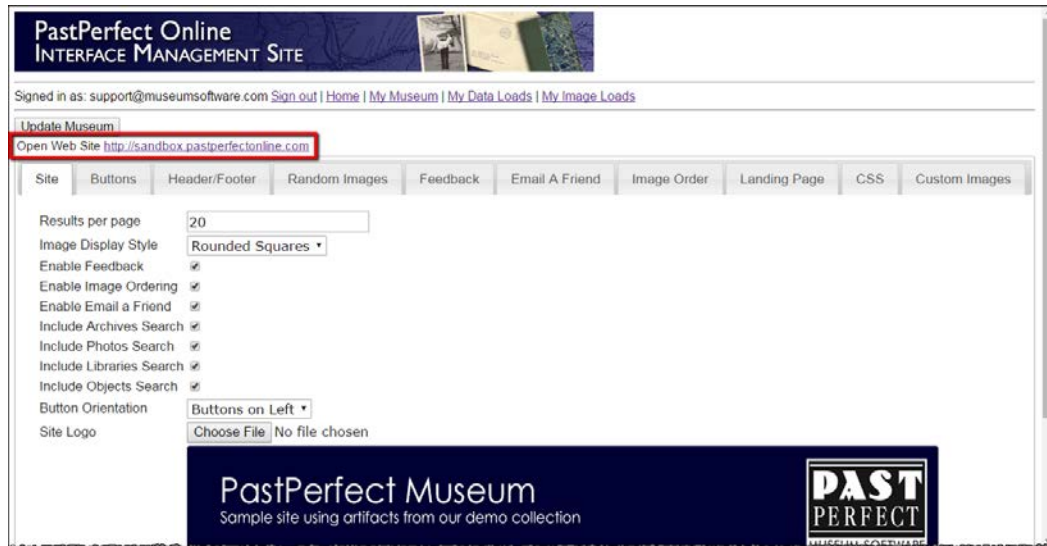
Random Images provide an excellent way for visitors to immerse themselves in your collection without having to search for anything specific. The Random Images tab within the Interface Management Site allows you to enable (and disable) the Random Images button on your PastPerfect Online site. You can also select which catalog record types you want to appear on the Random Images page. Only images from the selected catalogs will be displayed on the Random Images page.

Task

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **Random Images** tab.



3. Check the **Hide Image Titles** checkbox to have your thumbnail images display without a caption or title.
4. Check any of the catalog-specific checkboxes to include those image types on the Random Images page.
5. Once you have made your selections, click the **Update Museum** button at the top or bottom of your page to save the changes.
6. Click your Open Web Site link at the top of your page to view your changes.



References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Using Random Images](#)

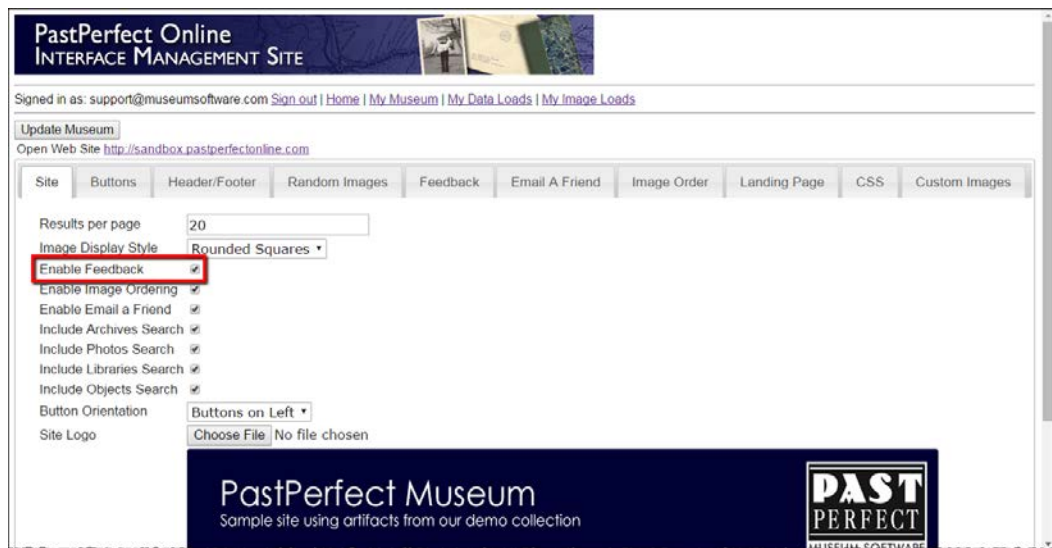
Interface Management Site - Enabling and Customizing the Feedback Form

Concept

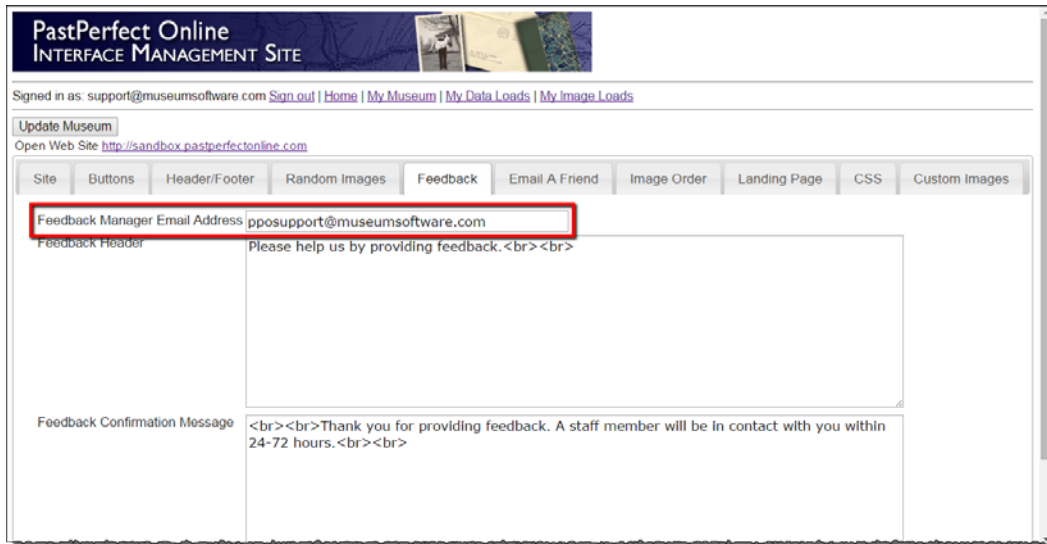
The Feedback Form accessed from each catalog record is a great way of connecting with your online visitors. Enabling and customizing the Feedback Form can all be done through the Interface Management Site. To enable the form, you will need to provide the email address where the feedback messages should be sent. You may either use the form's default instructions to the online visitor or you can customize the messages to fit your needs. Using HTML can help format these messages for better viewing in some browsers and email clients.

Task

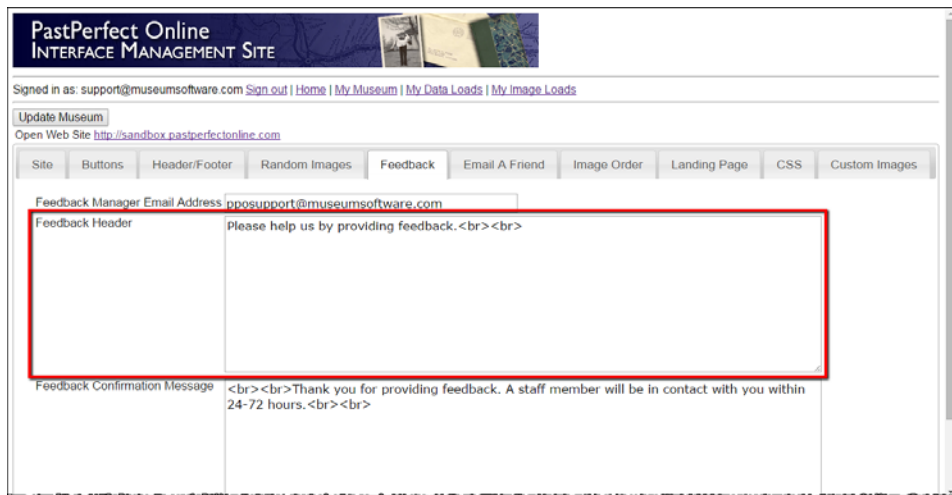
1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **Site** tab.
3. Check the box for **Enable Feedback**.



4. Click the **Feedback** tab.
5. Fill in the **Feedback Manager Email Address** field with the email address of the person who should receive the feedback messages.



6. Customize the following fields on the Feedback tab:
 - The **Feedback Header** field is used to provide instructions to the online visitor about this particular form. This message will appear at the top of your Feedback Form. Use HTML to get the formatting and spacing that you desire.



○

PastPerfect Museum
Sample site using artifacts from our demo collection

PAST PERFECT
MUSEUM SOFTWARE

Feedback Form

Please help us by providing feedback.

*Name

Phone

Alternate Phone

*Email Address

*Comments

** Required Information*

<http://sandbox.pastperfectonline.com/webobject/61E8171C-CADE-4BEE-80F0-531524481693>

- The **Feedback Confirmation Message** field is used as a confirmation that the form was submitted. This message will appear briefly on the screen after the form has been sent.

Update Museum

Open Web Site <http://sandbox.pastperfectonline.com>

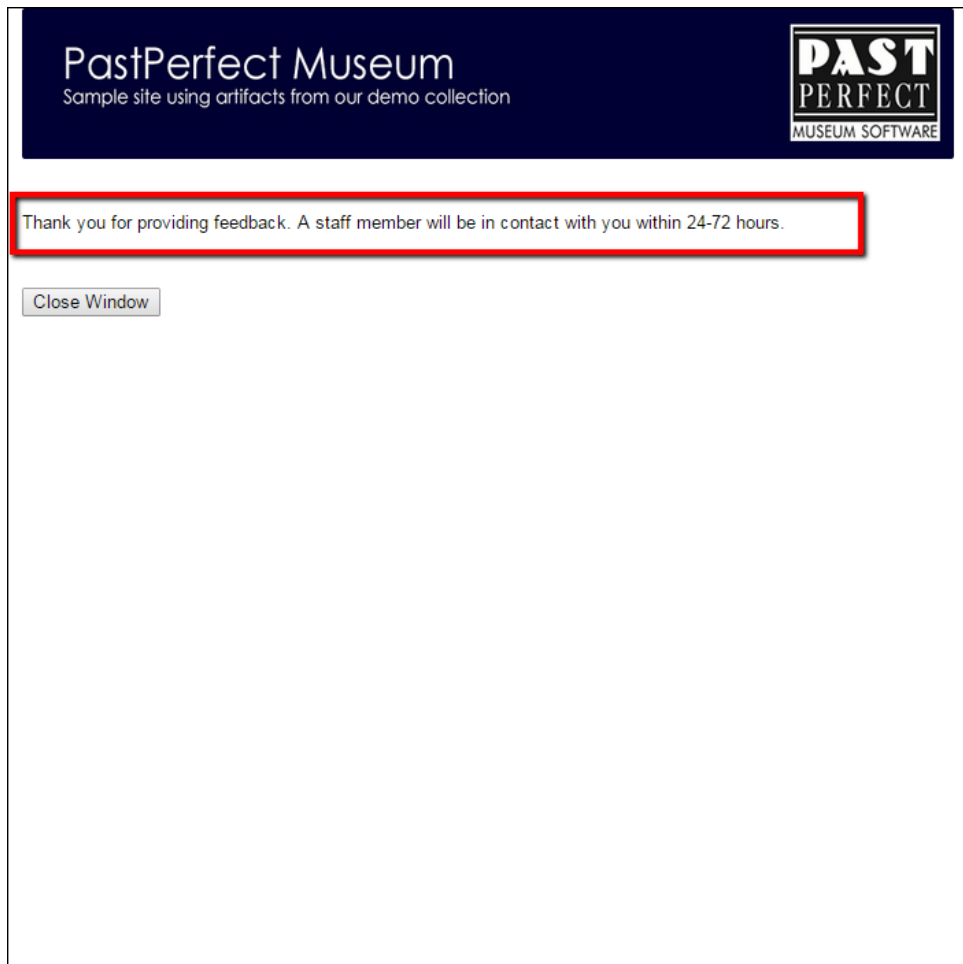
Site Buttons Header/Footer Random Images **Feedback** Email A Friend Image Order Landing Page CSS Custom Images

Feedback Manager Email Address

Feedback Header

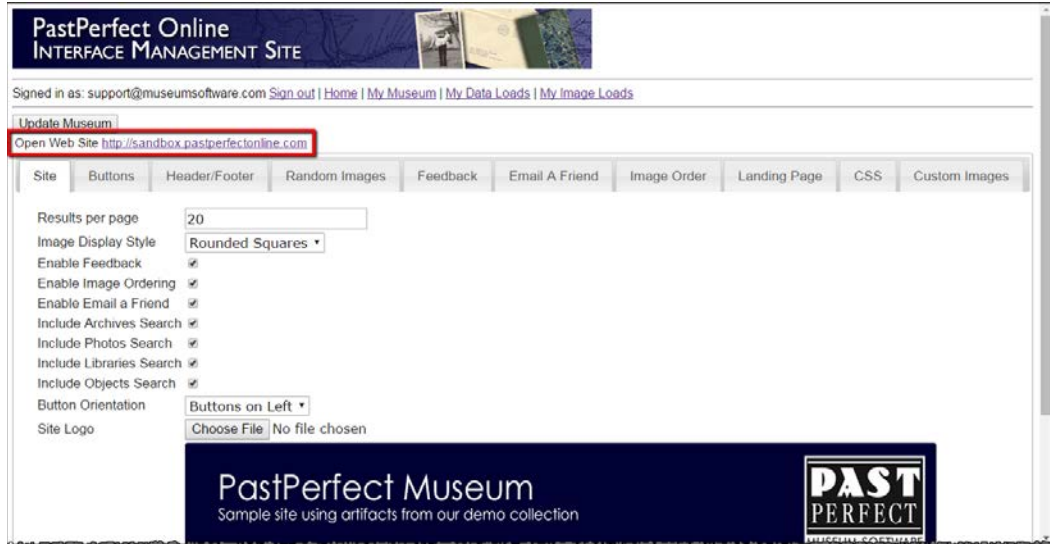
Feedback Confirmation Message

Update Museum



7. Click the **Update Museum** button at the top or bottom of your page to save the changes.

8. Click the **Open Web Site** link at the top of your page to test your changes.



9. Navigate to a record page on your site to test the **Send Us Feedback** button.

References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Send Us Feedback Button](#)
- [HTML Basics](#)

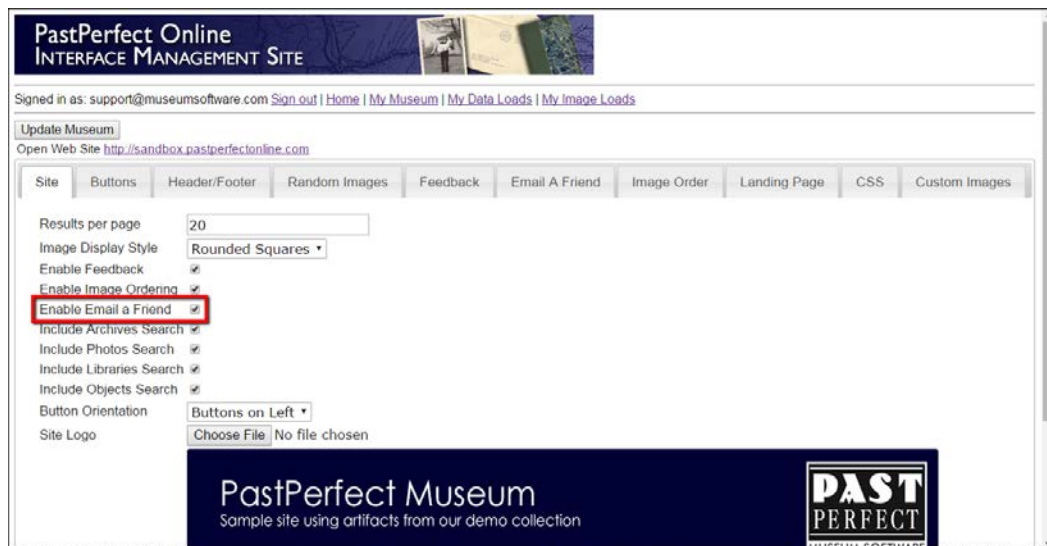
Interface Management Site - Enabling and Customizing the Email A Friend Form

Concept

The Email A Friend form is a simple tool that allows online visitors to share records from your collection with others. Enabling and customizing the Email A Friend Form can all be done through the Interface Management Site. You may either use the default messages or you can customize the messages for your organization. Using HTML can help format the message for better viewing in some browsers and email clients.

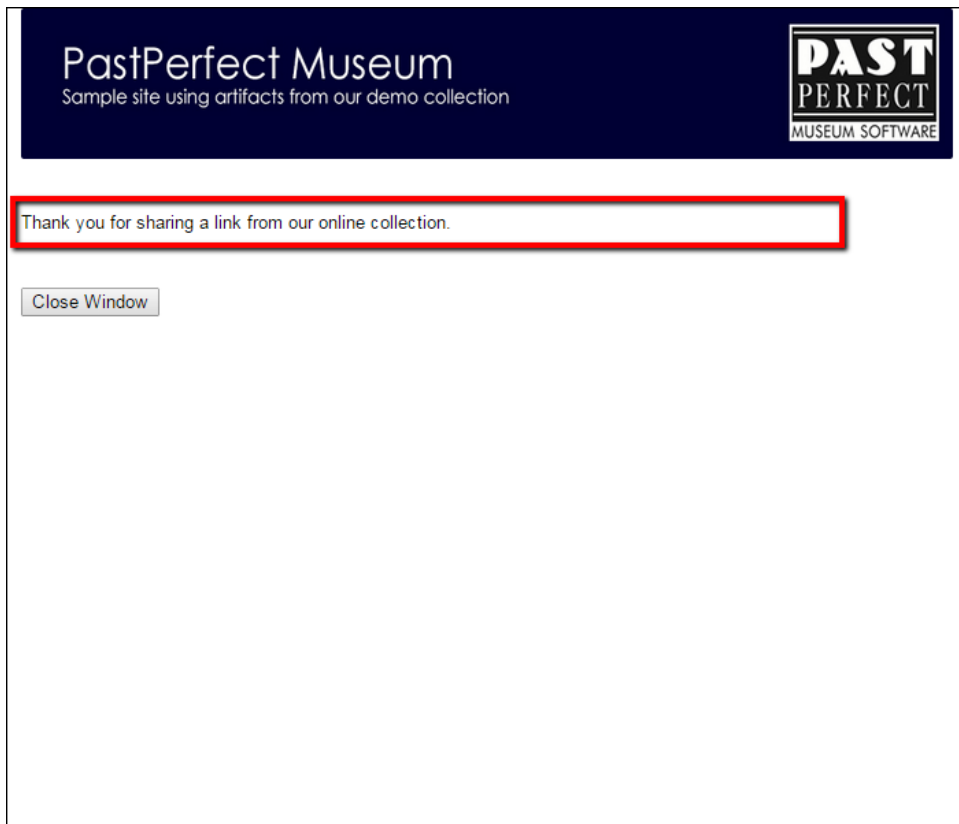
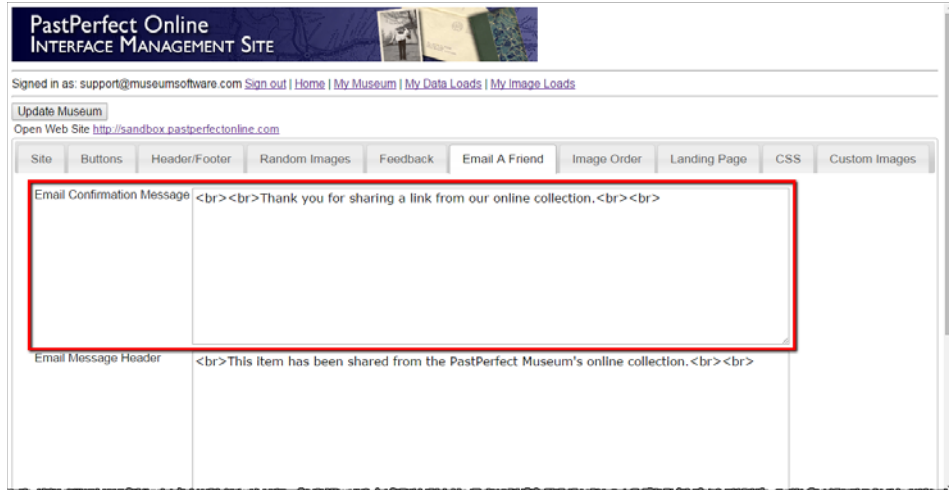
Task

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **Site** tab.
3. Check the box for **Enable Email a Friend**.

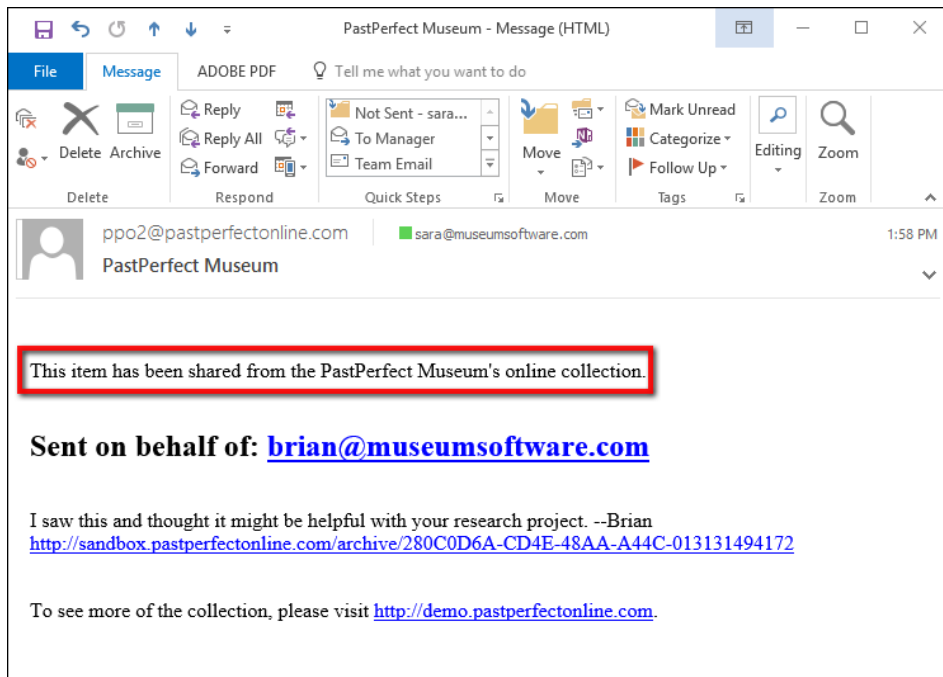
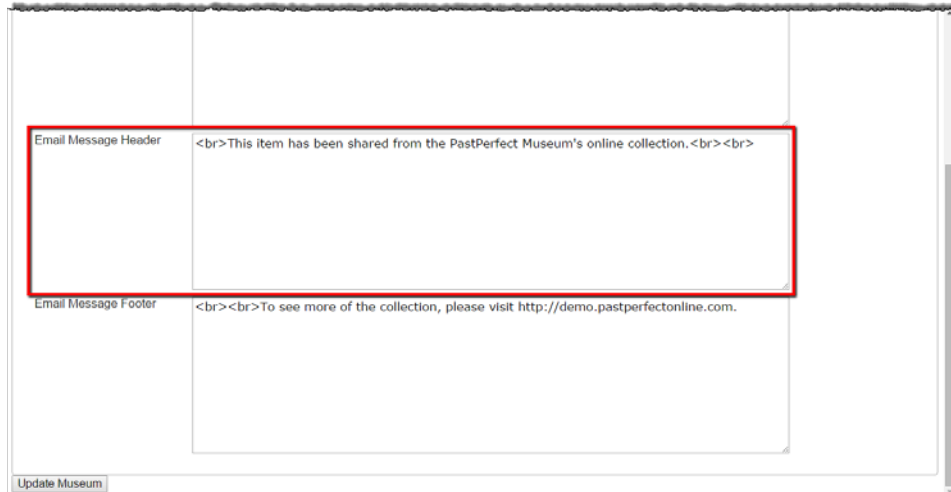


4. Click the **Email A Friend** tab.
5. Customize the messages associated with this email, populating any of the following fields with text as well as HTML code:
 - The **Email Confirmation Message** will appear briefly on the screen after the email has been sent. This message is designed to let the online visitor know that the email has been sent successfully.

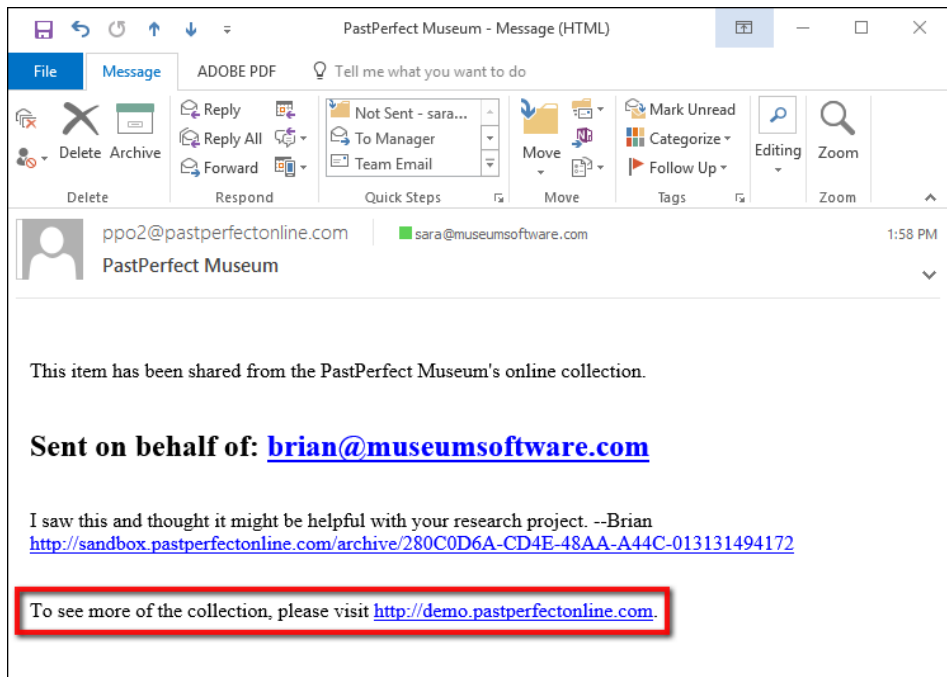
PastPerfect Online User's Guide



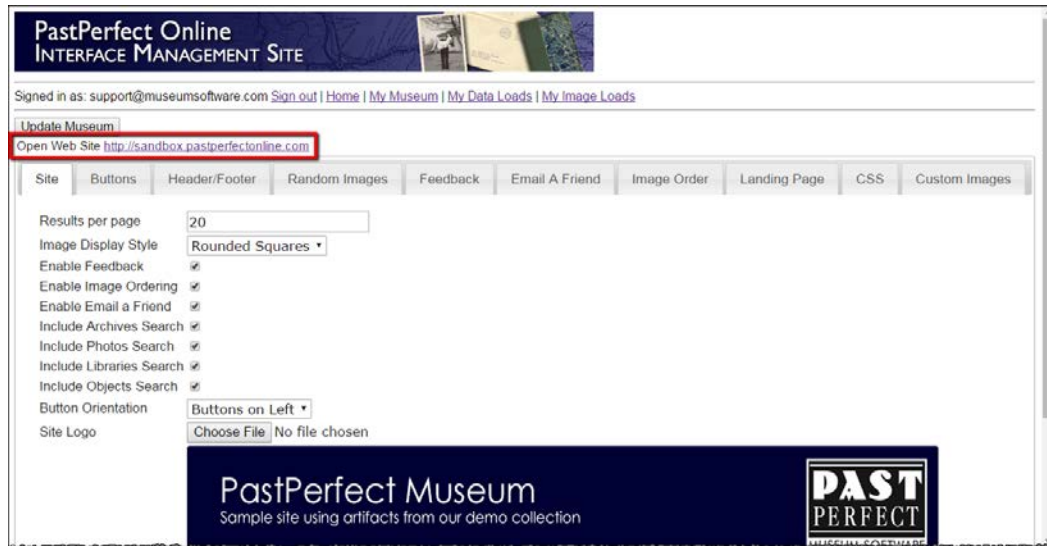
- The **Email Message Header** will appear at the top of the received email. This message may be used to inform the email recipient whose website is providing this link.



- The **Email Message Footer** will appear at the bottom of the received email. This message may be used to encourage email recipients to visit your main website and/or your PastPerfect Online site.



6. When you have edited your messages, click the **Update Museum** button at the top or bottom of your page to save the changes.
7. Click the **Open Web Site** link at the top of your page to view your changes.



References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Email to a Friend Button](#)
- [HTML Basics](#)

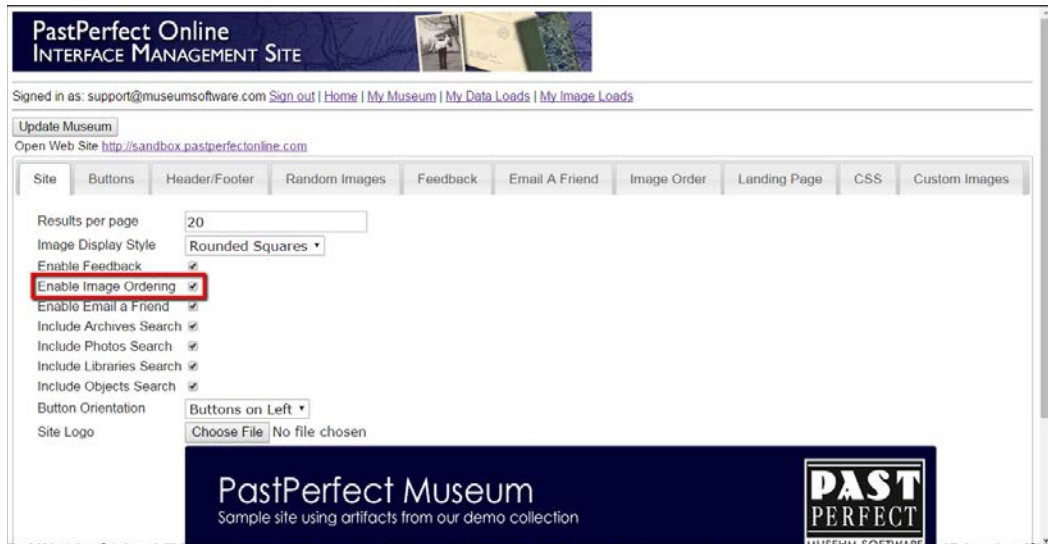
Interface Management Site - Enabling and Customizing the Image Request Form

Concept

The Image Request Form is a simple way for your online visitors to request an image reproduction from your collection. Enabling and customizing the Image Request Form can all be done through the Interface Management Site. To enable the form, you will need to provide the email address where the image requests should be sent. You may either use the form's default instructions to the online visitor or you can customize the messages to fit your needs.

Task

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **Site** tab.
3. Check the box for **Enable Image Ordering**.



4. Click the **Image Order** tab.
5. Fill in the **Image Order Manager Email Address** field with the email address of the person who should receive these requests.

PastPerfect Online
INTERFACE MANAGEMENT SITE

Signed in as: support@museumsoftware.com [Sign out](#) | [Home](#) | [My Museum](#) | [My Data Loads](#) | [My Image Loads](#)

Update Museum
Open Web Site <http://sandbox.pastperfectonline.com>

Site Buttons Header/Footer Random Images Feedback Email A Friend **Image Order** Landing Page CSS Custom Images

Image Order Manager Email Address pposupport@museumsoftware.com

Image Order Header Please fill out this form to request an image. A staff member will contact you to confirm the details of your request.

Image Purpose Description *Purpose: Provide information about how this image will be used.

6. Customize the form, filling in the following fields on the Image Order tab:
 - o The **Image Order Header** field is used to provide instructions to the online visitor about this particular form and your organization's image request process. This message will appear at the top of your Image Request Form.

PastPerfect Online
INTERFACE MANAGEMENT SITE

Signed in as: support@museumsoftware.com [Sign out](#) | [Home](#) | [My Museum](#) | [My Data Loads](#) | [My Image Loads](#)

Update Museum
Open Web Site <http://sandbox.pastperfectonline.com>

Site Buttons Header/Footer Random Images Feedback Email A Friend **Image Order** Landing Page CSS Custom Images

Image Order Manager Email Address pposupport@museumsoftware.com

Image Order Header Please fill out this form to request an image. A staff member will contact you to confirm the details of your request.

Image Purpose Description *Purpose: Provide information about how this image will be used.

PastPerfect Museum
Sample site using artifacts from our demo collection




Image Request Form

Please fill out this form to request an image. A staff member will contact you to confirm the details of your request.

*Name	<input type="text"/>
Address	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip/Postal Code	<input type="text"/>
Country	<input type="text"/>
*Phone	<input type="text"/>
Alternate Phone	<input type="text"/>
*Email Address	<input type="text"/>
Format Required (Black&White/Color, Print/Digital)	<input type="text"/>
*Purpose: Provide information about how this image will be used.	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>

*** Required Information**

http://sandbox.pastperfectonline.com/archive/DBD4C714-B9BB-4A4E-B801-789270013511 has been requested through your PastPerfect-Online site.

- The **Image Purpose Description** field is used to label the box where online visitors should describe how they plan to use the image. Please note: this is a required field on the Image Order Form, so we recommend starting your message with an asterisk (*).

<p style="font-size: small;">Image Purpose Description</p> <div style="border: 2px solid red; height: 60px; width: 100%;"></div>	<p style="font-size: small;">*Purpose: Provide information about how this image will be used.</p>
<p style="font-size: small;">Image Order Confirmation Message</p>	<p style="font-size: small;">

Thank you for submitting an image request. A staff member will be in contact with you regarding the details of your request.

</p>

PastPerfect Museum
Sample site using artifacts from our demo collection




Image Request Form

Please fill out this form to request an image. A staff member will contact you to confirm the details of your request.

*Name	<input type="text"/>
Address	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip/Postal Code	<input type="text"/>
Country	<input type="text"/>
*Phone	<input type="text"/>
Alternate Phone	<input type="text"/>
*Email Address	<input type="text"/>
Format Required (Black&White/Color, Print/Digital)	<input type="text"/>

*Purpose: Provide information about how this image will be used.

*** Required Information**

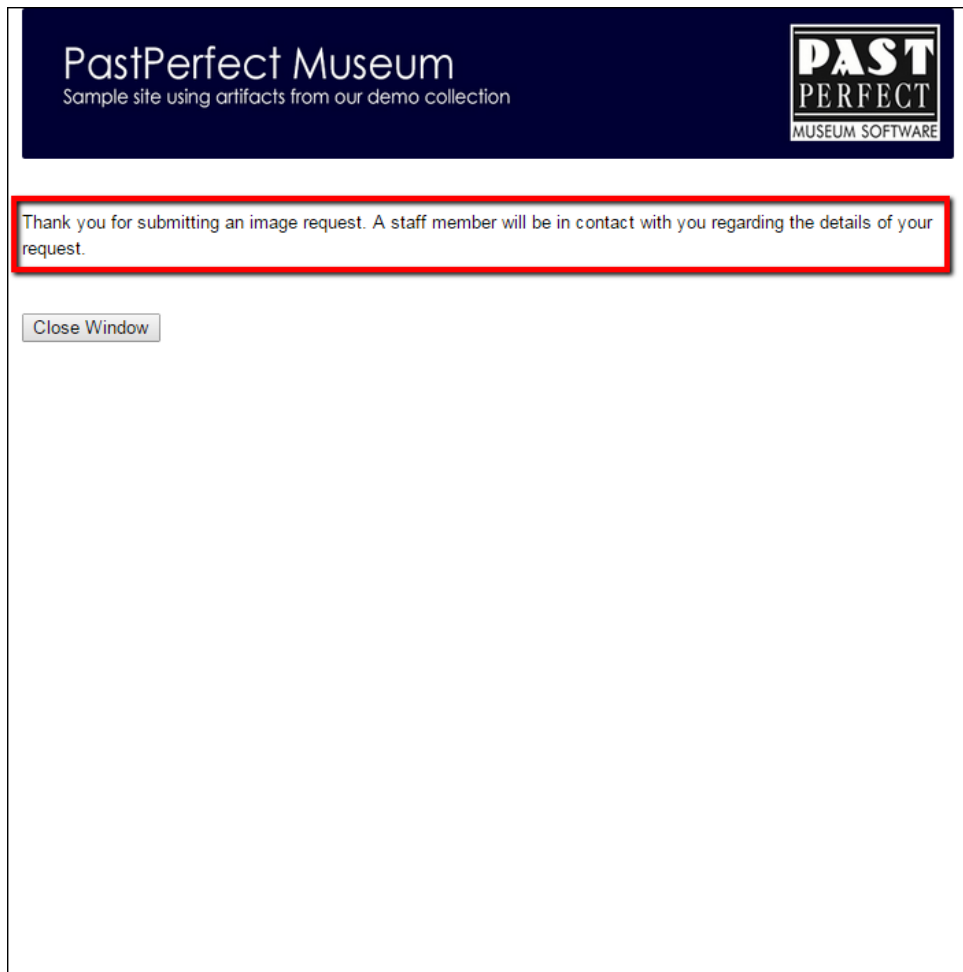
<http://sandbox.pastperfectonline.com/archive/DBD4C714-B9BB-4A4E-B801-789270013511> has been requested through your PastPerfect-Online site.

- The **Image Order Confirmation Message** field is used as a confirmation that the form was submitted. This message will appear briefly on the screen after the form has been sent.

Image Purpose Description	<div style="border: 2px solid red; padding: 5px;"><p>*Purpose: Provide information about how this image will be used.</p></div>
Image Order Confirmation Message	<div style="border: 2px solid red; padding: 5px;"><p>

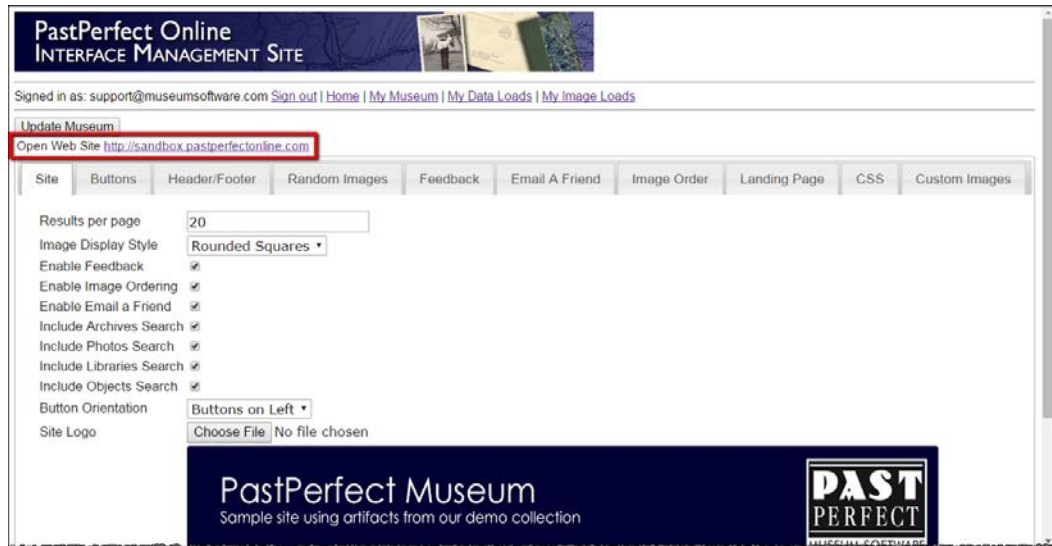
Thank you for submitting an image request. A staff member will be in contact with you regarding the details of your request.

</p></div>



7. Click the **Update Museum** button at the top or bottom of your page to save the changes.
8. Click the **Open Web Site** link at the top of your page to view your changes.

PastPerfect Online User's Guide



References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Request Image Button](#)
- [HTML Basics](#)

Interface Management Site - Customizing Your Landing Page

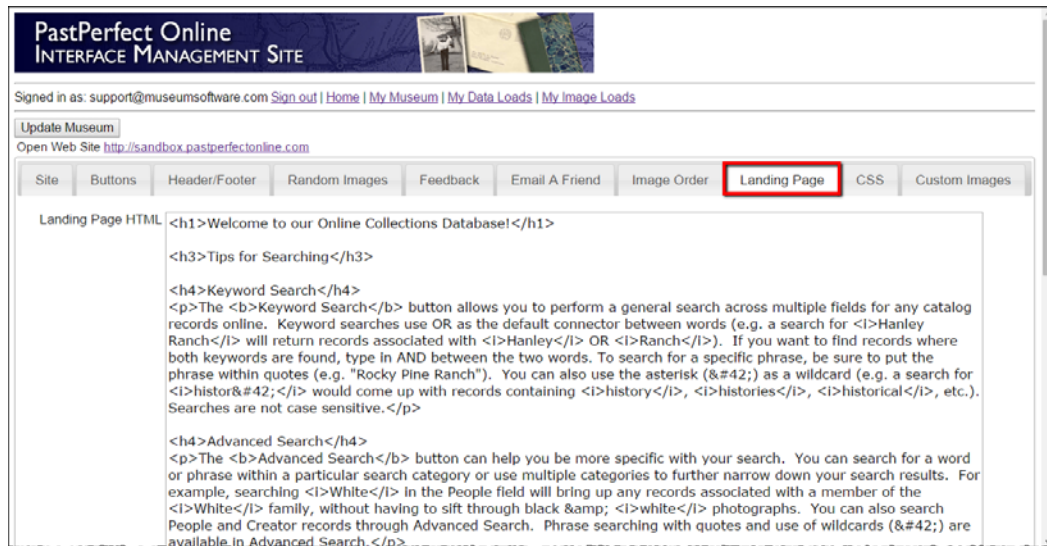
Concept

Your Landing Page (the PPO Site Address as listed on your PPO Welcome Letter) is the introduction to your PastPerfect Online site. Online visitors can see your logo and navigational buttons, but the main part of the page is customizable. You can use this space to provide additional information to your visitors. Possible options for this Landing Page include: welcoming online visitors to your site, describing your organization and mission statement, sharing search tips, providing links to common searches in your collection, encouraging online visitors to contribute to your organization, acknowledging donors/sponsors who made your site possible, etc.

The Landing Page tab within the Interface Management Site is where you customize your Landing Page. By default, your Landing Page contains search tips for your visitors. You can remove, edit, or add to this default text. When modifying this page you need to use HTML code. For basic HTML codes, see the References section of this topic.

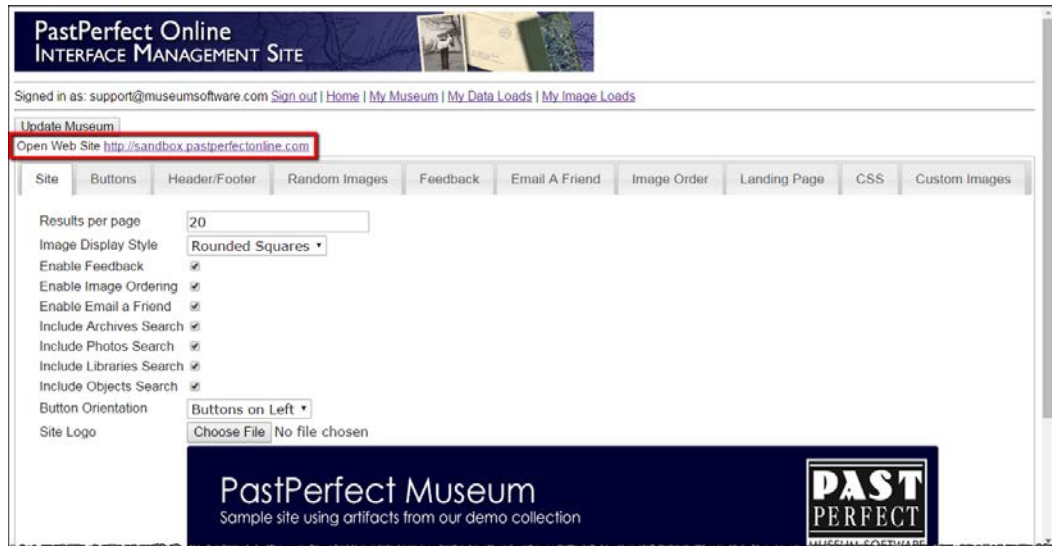
Task

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **Landing Page** tab.



3. Add your text and HTML code to the **Landing Page HTML** field.
4. Click the **Update Museum** button at the top or bottom of your page to save the changes.
5. Click your Open Web Site link at the top of your page to view your changes.

PastPerfect Online User's Guide



References

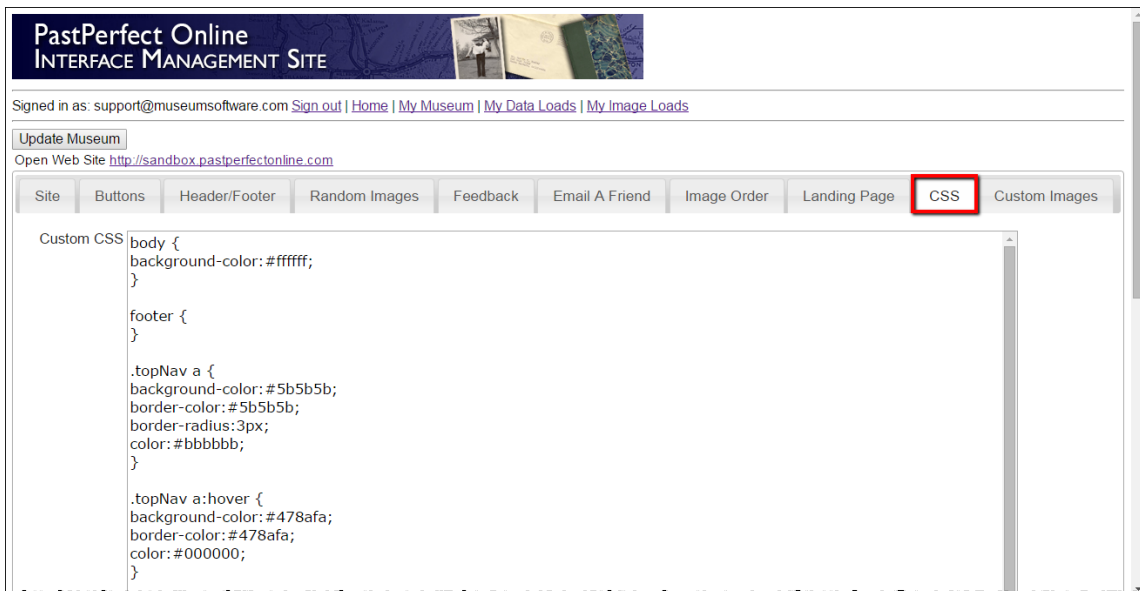
- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [HTML Basics](#)

Interface Management Site - CSS Tab

Concept

PastPerfect Online sites use Cascading Style Sheets (CSS) to affect the appearance of the pages. CSS can be used to change colors of certain elements, add/remove borders, alter spacing, change how hyperlinks appear, and much more. The CSS entered into this field will be embedded in the head of the HTML pages, overriding the settings made in the default style sheets. While it is possible to modify the CSS for your site through the Interface Management Site, we recommend only doing so if you have a strong working knowledge of CSS.

Warning: Making changes to the CSS will alter the appearance of your site, and if done incorrectly could cause the site to lose all styling.



References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Introduction to Advanced Customization](#)

Advanced Style and Customization

Introduction to Advanced Customization

The PastPerfect Online Support Team will stylize the basic design elements for your site, however more advanced customization is possible. While the information in this section will assist you in making changes to your site's CSS, we recommend only making changes if you have a strong working knowledge of CSS. Our staff is happy to assist you with making changes.

Major design components of your PastPerfect Online site are based on multiple external style sheets. When modifying the CSS through IMS, you create an internal style sheet that will override these default external sheets.

Warning: Making changes to the CSS will alter the appearance of your site, and if done incorrectly could cause the site to lose all styling.

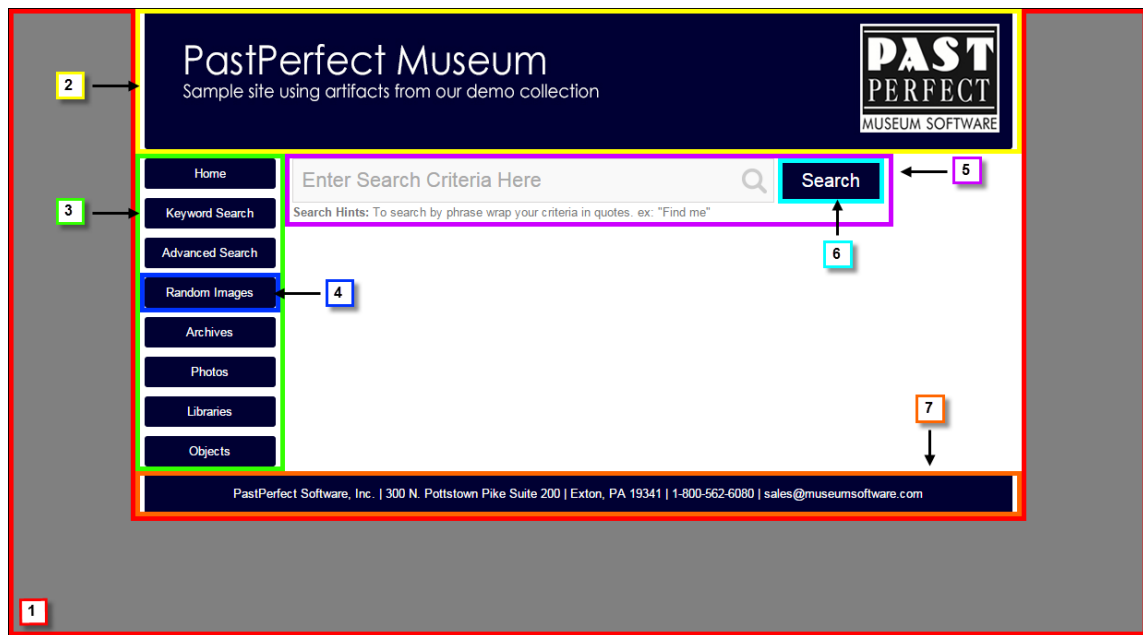
Page Element Diagrams

Concept

Cascading Style Sheets (CSS) assist in formatting block level elements. When working on customizing the CSS for your site, it may be helpful to see a visual representation of the main elements of a page. These diagrams highlight different sections of the pages, but it is not a full breakdown of all elements. You may need to combine different elements to apply customizations to specific areas.

These examples show a site with left navigation. If you choose top navigation, `.leftNav` will be replaced with `.topNav`.

Search Page



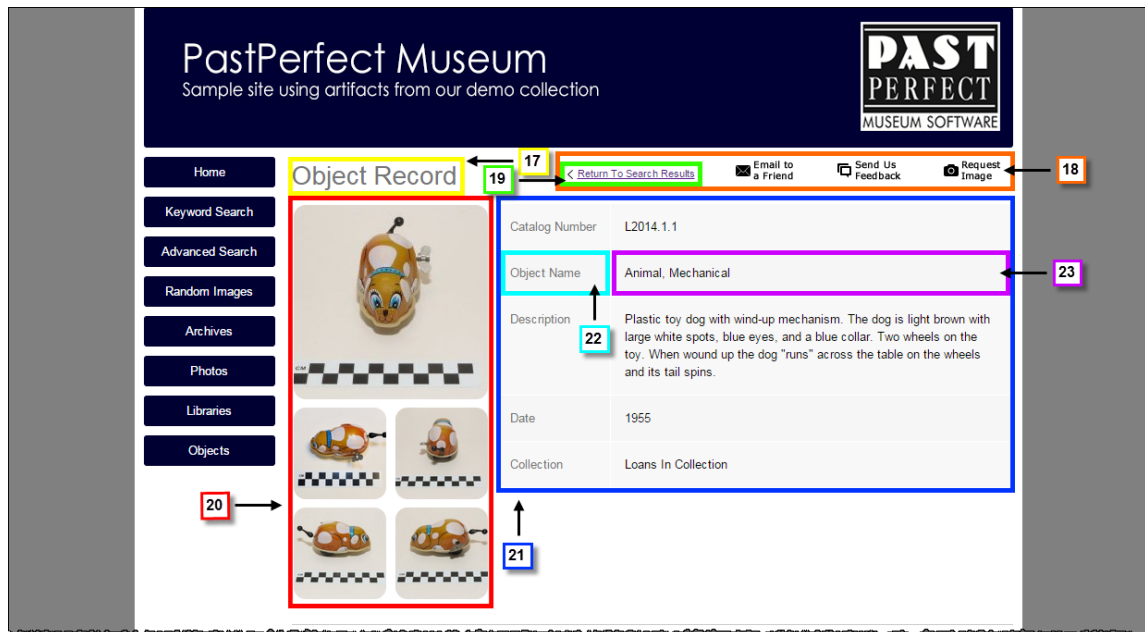
1. body
2. .header
3. .leftNav
4. .leftNav a
5. .topSearchArea
6. .topSearchArea input [type=submit]
7. footer

Search Results Page



- 8. .searchResultTitle
- 9. .searchResultTitle number
- 10..invdResult
- 11..invdImage
- 12..indvResultDetails
- 13..indvResultDetails a
- 14..indvResultDetails p
- 15..indvResultDetails h4
- 16..highlightedWord

Record Page



- 17..singleResult h1
- 18..icons
- 19..icons a
- 20..relatedPhotos
- 21..recordData
- 22..category
- 23..display

References

- [Interface Management Site - CSS Tab](#)
- [Changing the Background Color of Your Site](#)
- [Changing the Color of the Navigation Buttons](#)
- [Changing the Color of the Search Buttons](#)
- [Styling the Footer](#)

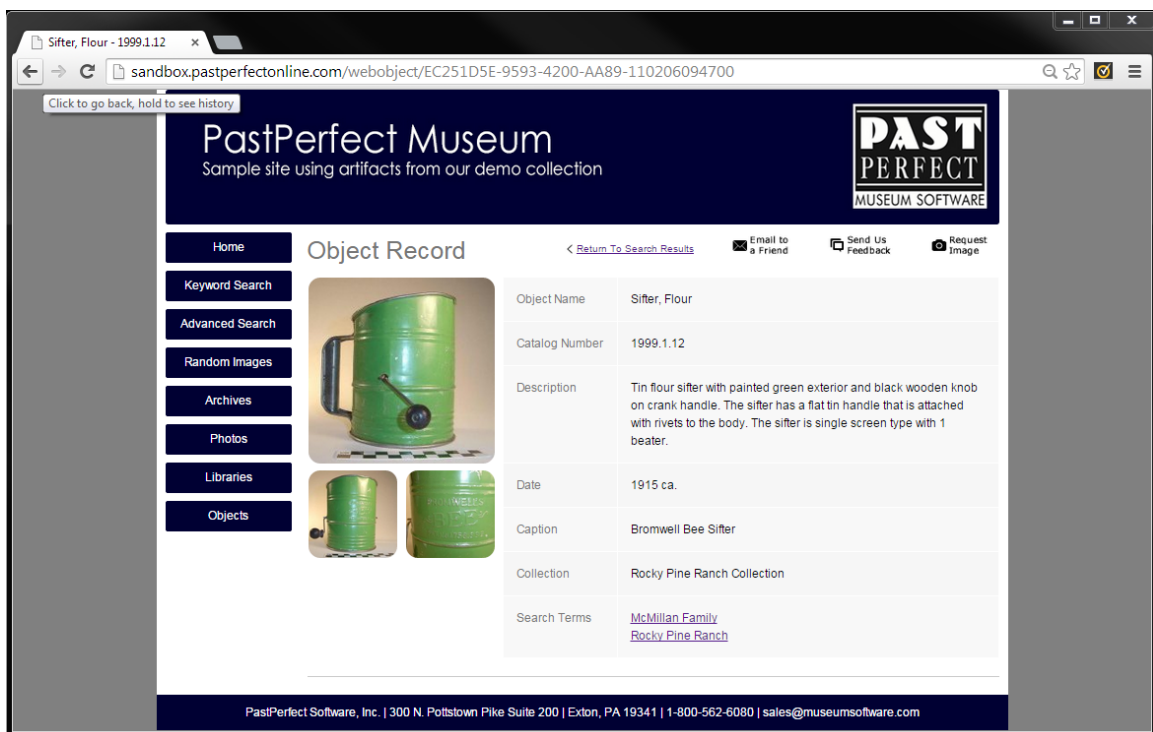
Changing the Background Color of Your Site

Concept

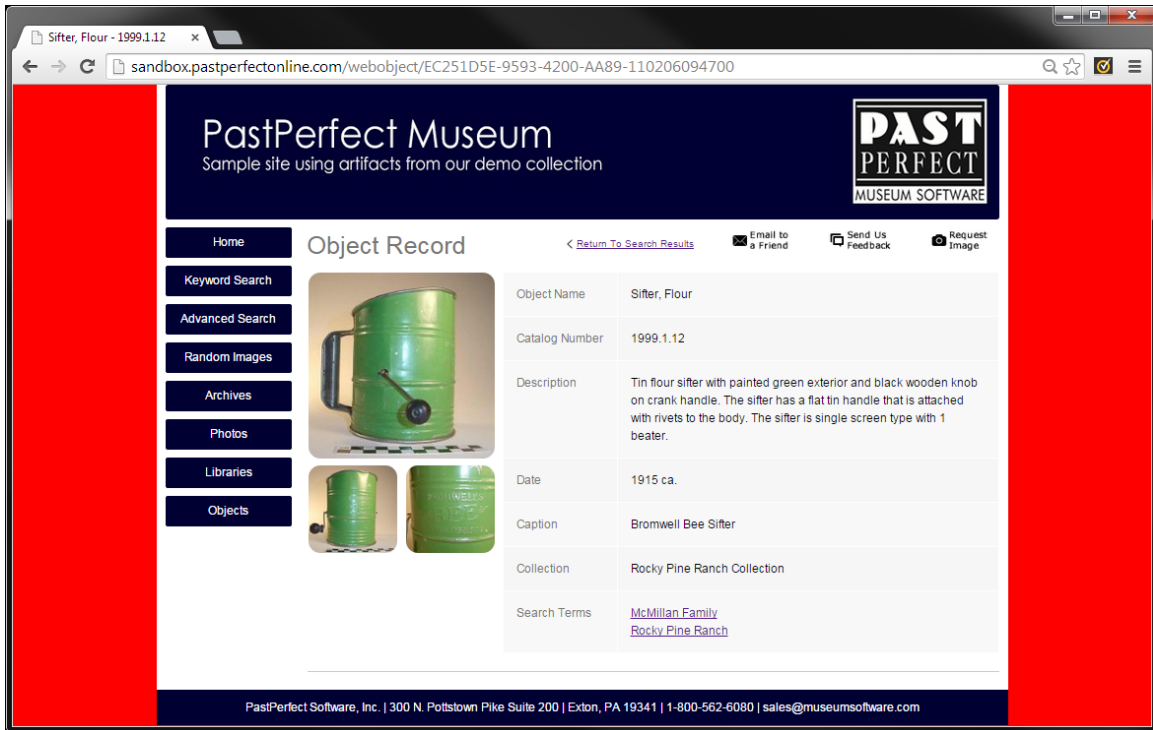
One of the easiest ways to modify the appearance of your site is to change the background color. You may want to use the same background color as your main website to maintain continuity between that site and your PastPerfect Online site.

In the Custom CSS field, you will see colors are represented by a six-digit hex code/value. For help selecting a color and finding the hex code, see the HTML Color Picker link listed under Reference.

Site with a gray background



Site with a red background



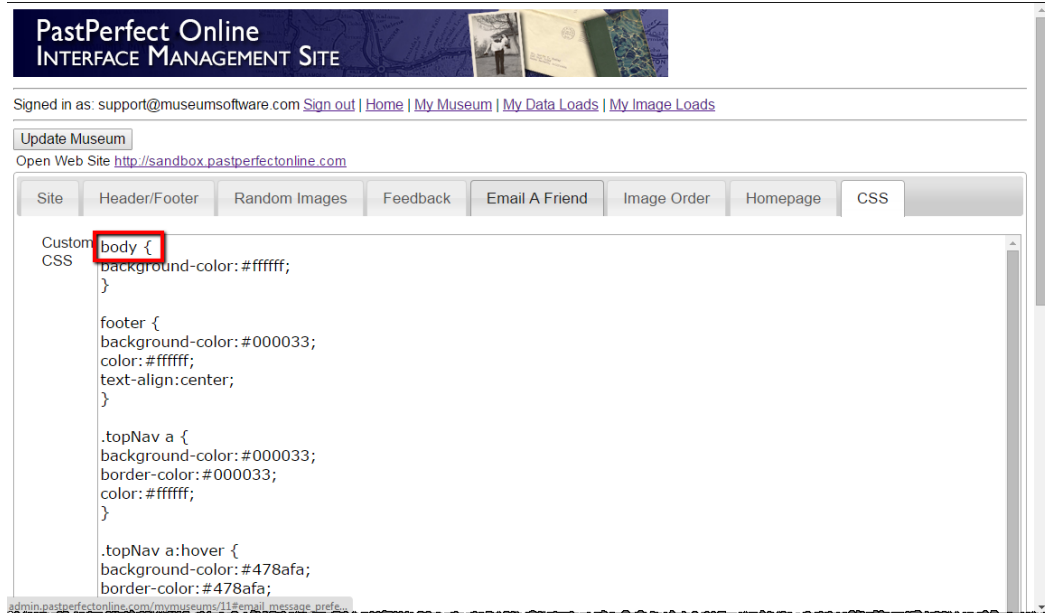
Warning: Making changes to the CSS will alter the appearance of your site, and if done incorrectly could cause the site to lose all styling.

Task

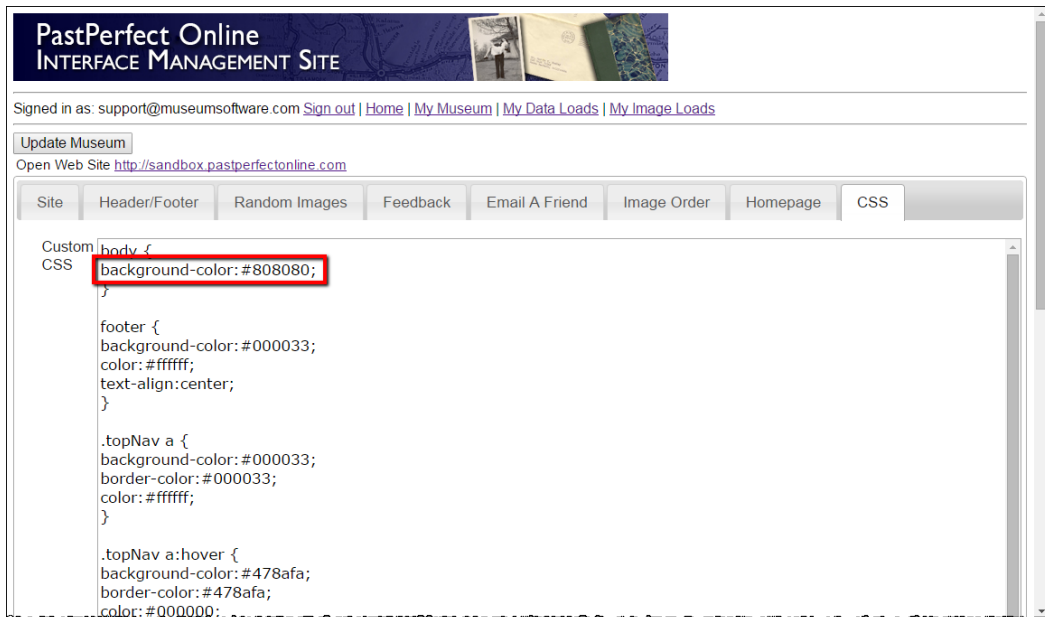
If previous modifications have been made by PastPerfect staff or someone in your organization, the hex codes referenced in these steps may not be the same as the hex codes in your Custom CSS field.

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **CSS** tab.

3. In the **Custom CSS** field, locate the **body** element.



4. To the right of the **background-color** property, change the "ffffff" to the hex code of your choice. Be sure to leave the "#" and ";" before and after the hex code.



5. Once you have made your changes, click the **Update Museum** button at the top or bottom of your page to save the changes.
6. Click the **Open Web Site** link at the top of the page to view your changes.

Reference

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Interface Management Site - CSS Tab](#)
- [HTML Color Picker](#)

Changing the Color of the Navigation Buttons

Concept

The appearance of the navigation buttons that display along the top or left side of your PastPerfect Online site can be modified by making changes in the Custom CSS field of IMS. The default CSS includes properties to change the background color of the buttons, the border color around the buttons, and the color of the text. If you would like to make additional changes to the appearance of your buttons, contact our staff for assistance or work with your web designer.

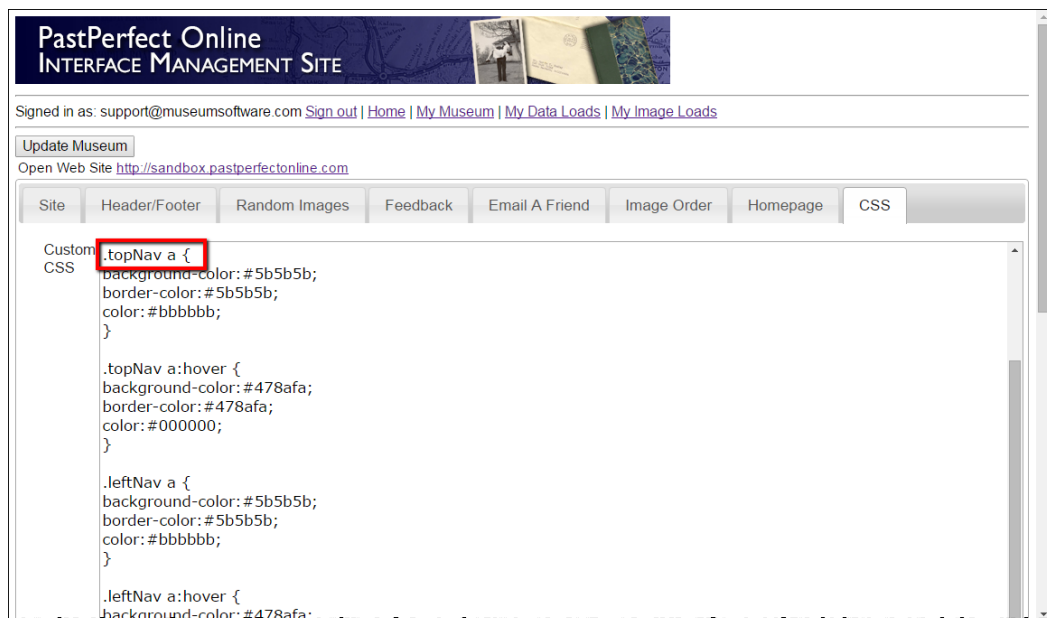
In the Custom CSS field, you will see colors are represented by a six-digit hex code/value. For help selecting a color and finding the hex code, see the HTML Color Picker link listed under Reference.

Warning: *Making changes to the CSS will alter the appearance of your site, and if done incorrectly could cause the site to lose all styling.*

Task

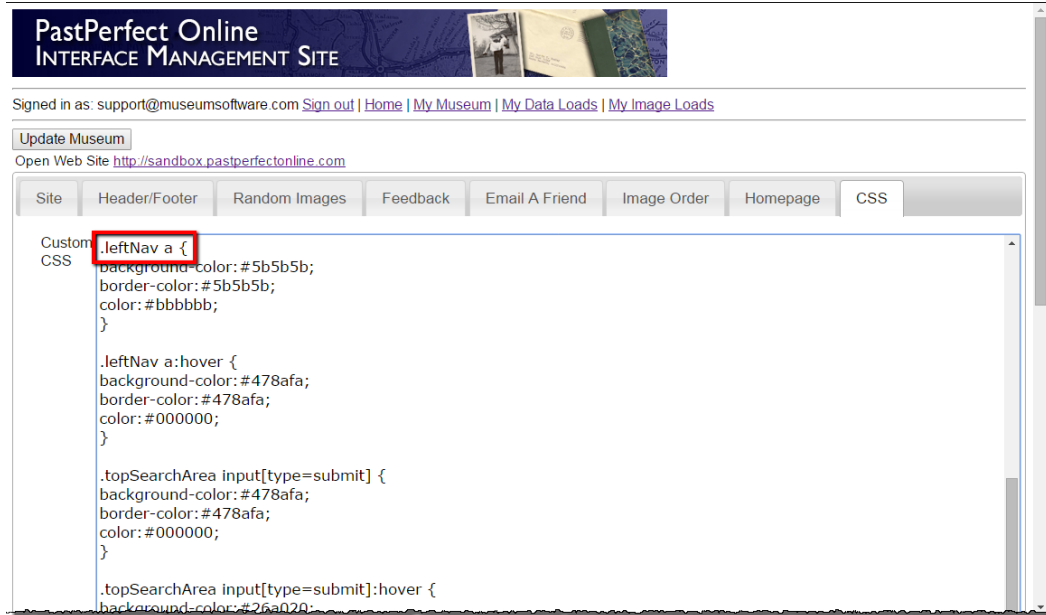
If previous modifications have been made by PastPerfect staff or someone in your organization, the hex codes referenced in these steps may not be the same as the hex codes in your Custom CSS field.

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **CSS** tab.
3. If the buttons on your site display along the top, locate the **.topNav a** element.

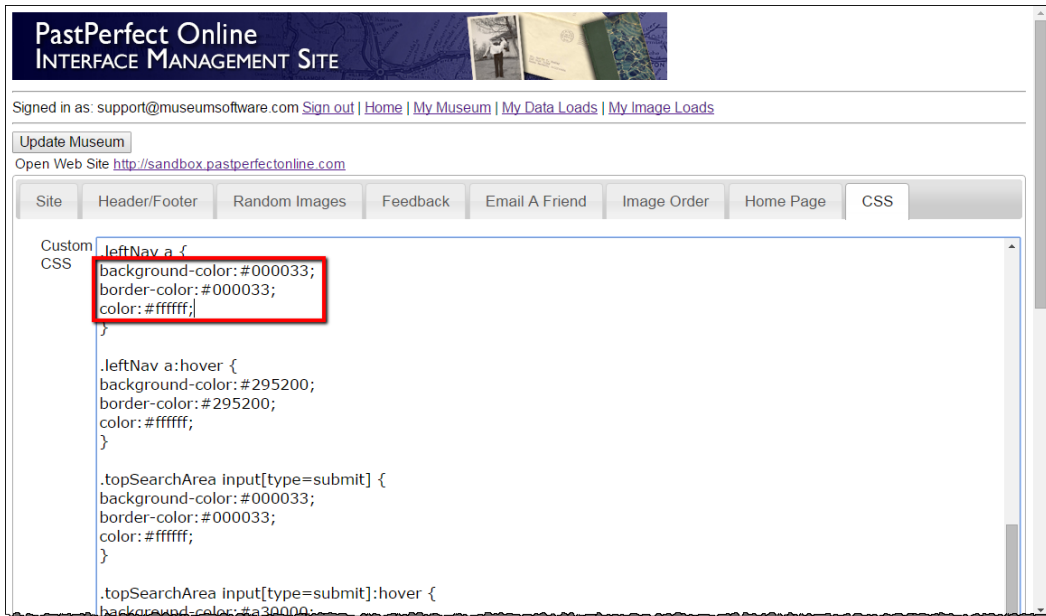


If the buttons on your site display along the left side, locate the **.leftNav a**

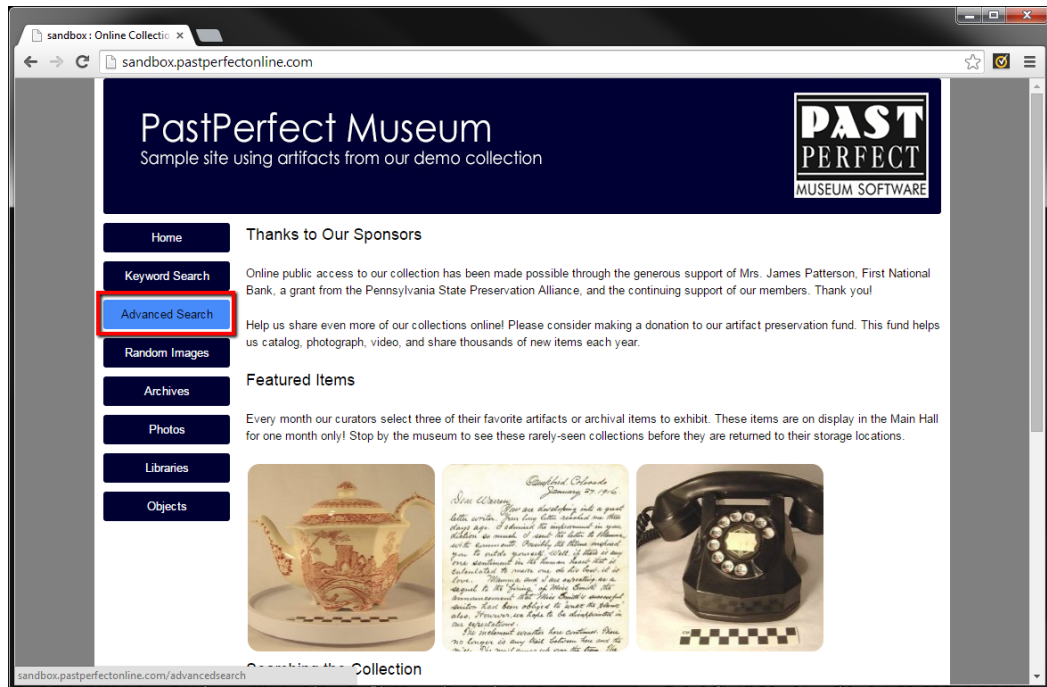
element.



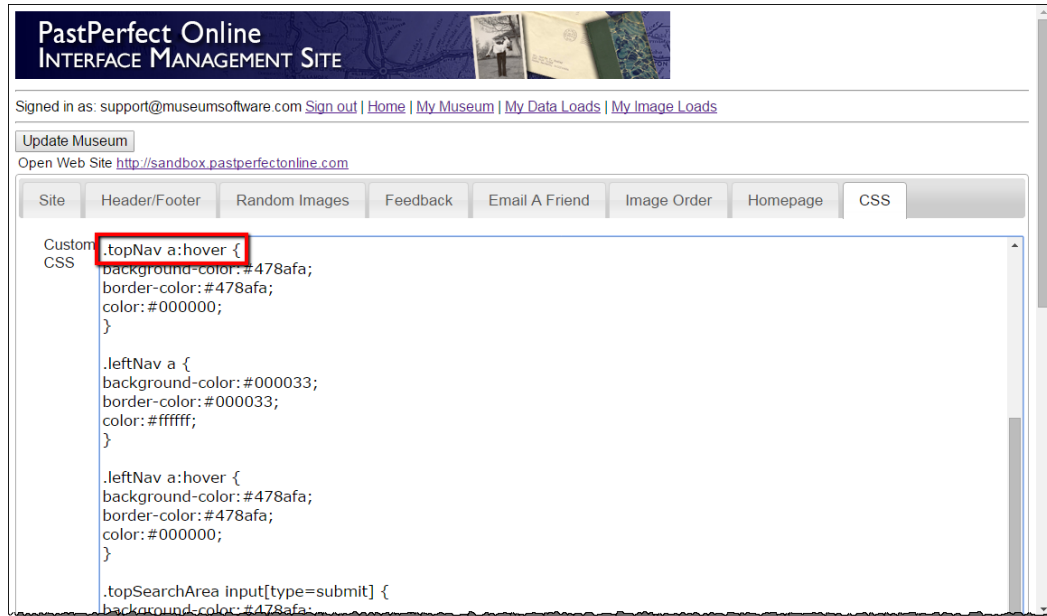
4. To change the colors, replace the hex codes to the right of each property with the hex code of your choice. Be sure to leave the "#" and ";" before and after the hex code.
 - **background-color** - color of the buttons
 - **border-color** - color of the border around the buttons
 - **color** - color of the text of the buttons



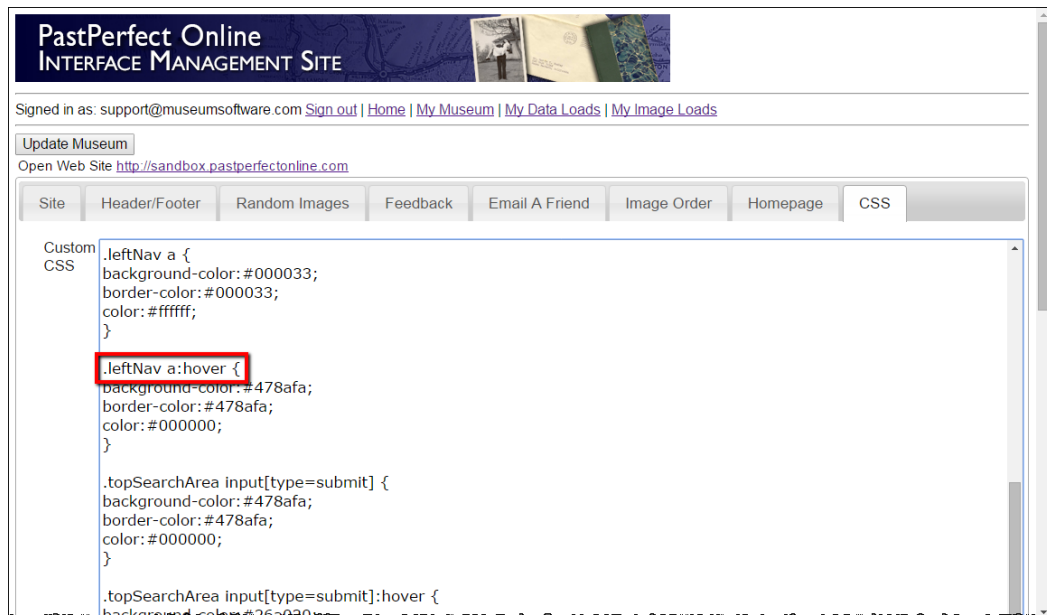
5. Once you have made your changes, click the **Update Museum** button at the top or bottom of your page to save the changes.
6. Click the **Open Web Site** link at the top of the page to view your changes.
7. While viewing your site, you should see that the buttons, the border around them, and the text have changed color. You will also notice that when you hover over a button, the color changes.



8. To change the appearance of the buttons when you hover over them, close your browser, then return to the Interface Management Site and select the CSS tab. Some organizations change both the background color and the text color, while others decide to leave the background color unchanged and change only the color of the button text.
9. If the buttons on your site display along the top, locate the **.topNav a:hover** element.



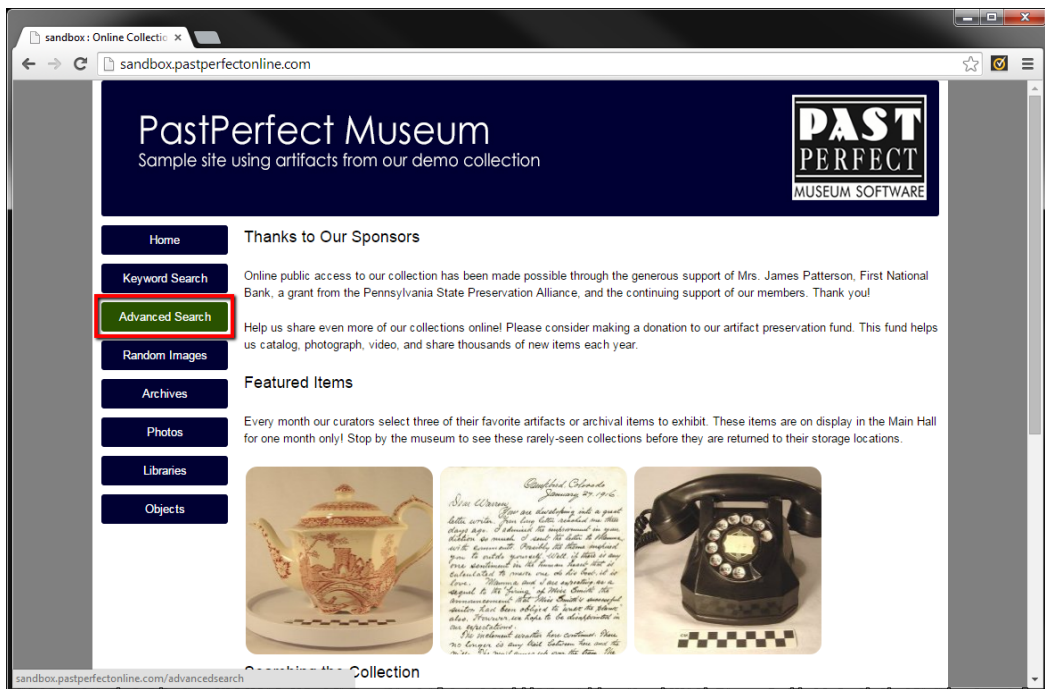
If the buttons on your site display along the left side, locate the **.leftNav a:hover** element.



10. If you want the button's background color to change when a web visitor hovers or clicks on a button, select a different background color for **.topNav a:hover** than you did for **.topNav a**. To change the colors, replace the hex codes to the right of each property with the hex code of your choice. Be sure to leave the "#" and ";" before and after the hex code.
- **background-color** - color of the buttons
 - **border-color** - color of the border around the buttons
 - **color** - color of the text of the buttons



11. Once you have made your changes, click the **Update Museum** button at the top or bottom of your page to save the changes.
12. Click the **Open Web Site** link at the top of the page to view your changes.
13. While viewing your site, hover over the navigation buttons to see the colors change.



Reference

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Interface Management Site - Site Tab](#)
- [Interface Management Site - CSS Tab](#)
- [HTML Color Picker](#)

Changing the Color of the Search Buttons

Concept

The appearance of the search buttons on the Keyword Search and Advanced Search pages can be modified by making changes in the Custom CSS field of IMS. The default CSS includes properties to change the background color of the buttons, the border color around the buttons, and the color of the text. If you would like to make additional changes to the appearance of your buttons, contact our staff for assistance or work with your web designer.

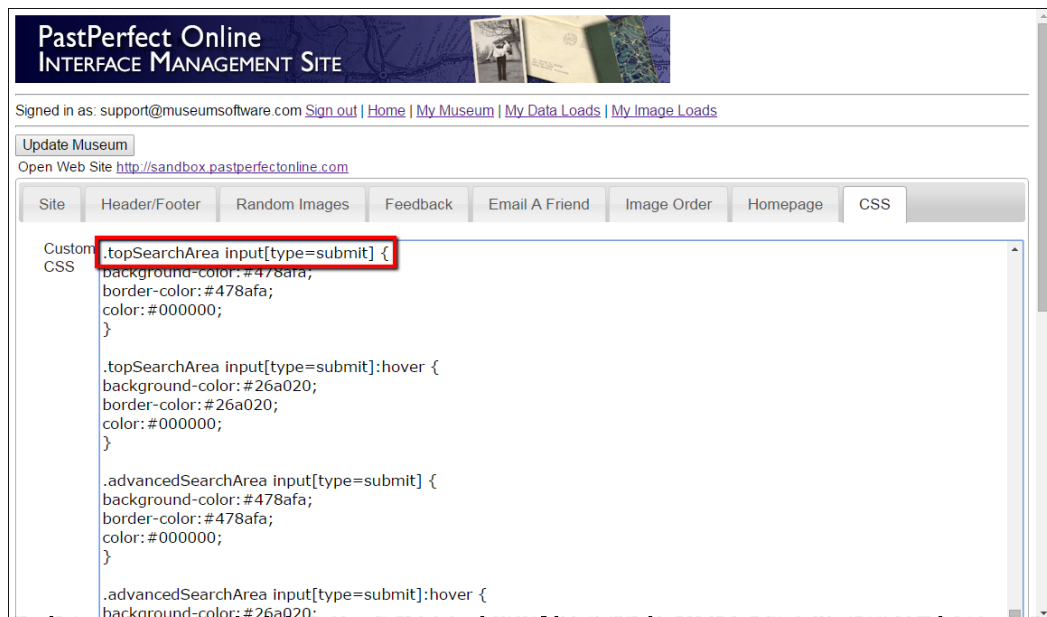
In the Custom CSS field, you will see colors are represented by a six-digit hex code/value. For help selecting a color and finding the hex code, see the HTML Color Picker link listed under Reference.

Warning: Making changes to the CSS will alter the appearance of your site, and if done incorrectly could cause the site to lose all styling.

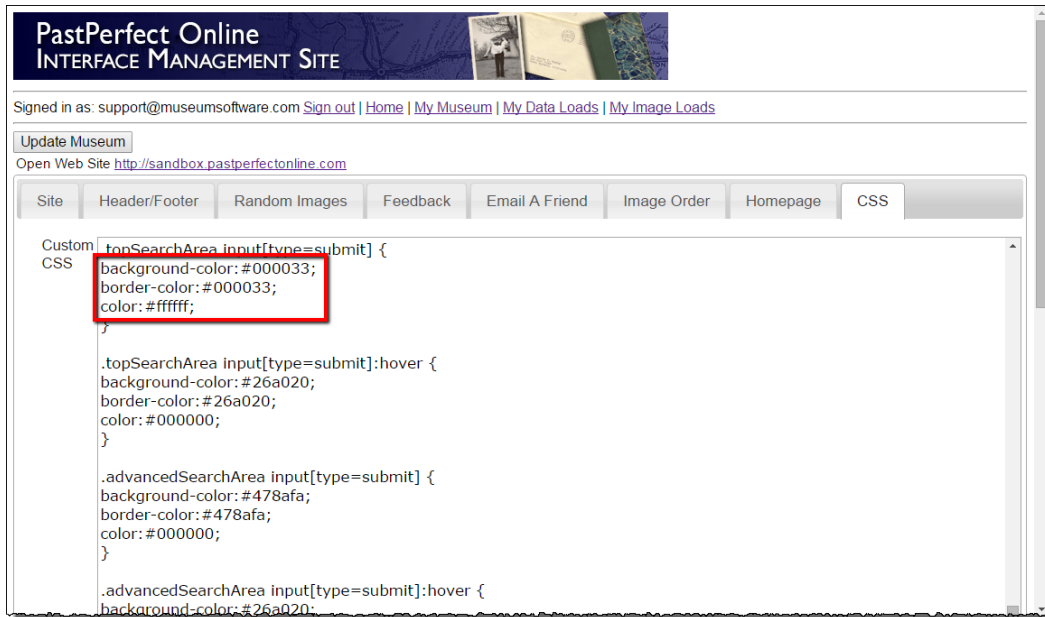
Task

If previous modifications have been made by PastPerfect staff or someone in your organization, the hex codes referenced in these steps may not be the same as the hex codes in your Custom CSS field.

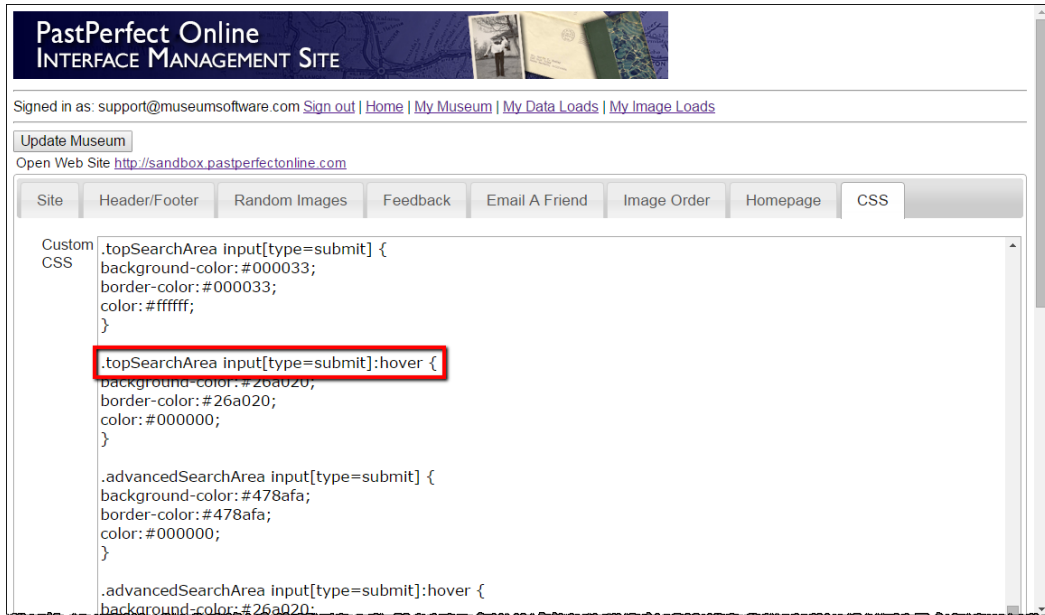
1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **CSS** tab.
3. Locate the **.topSearchArea input[type=submit]** element. This is the "Search" button that appears on the Keyword Search, Archives, Photos, Libraries, and Objects pages.



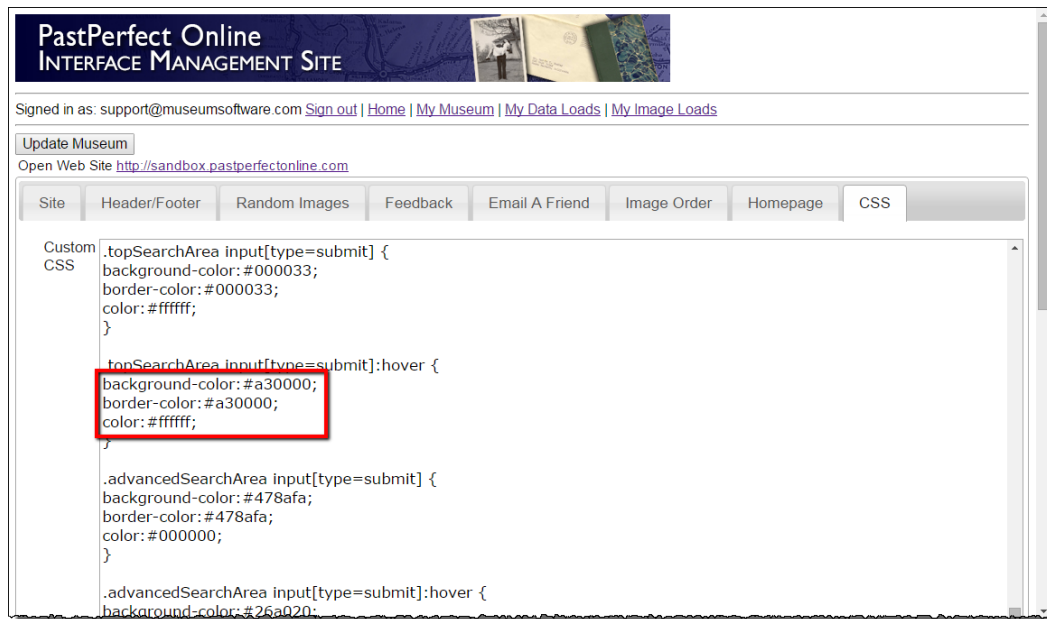
4. To change the colors, replace the hex codes to the right of each property with the hex code of your choice. Be sure to leave the "#" and ";" before and after the hex code.
 - **background-color** - color of the button
 - **border-color** - color of the border around the button
 - **color** - color of the text of the button



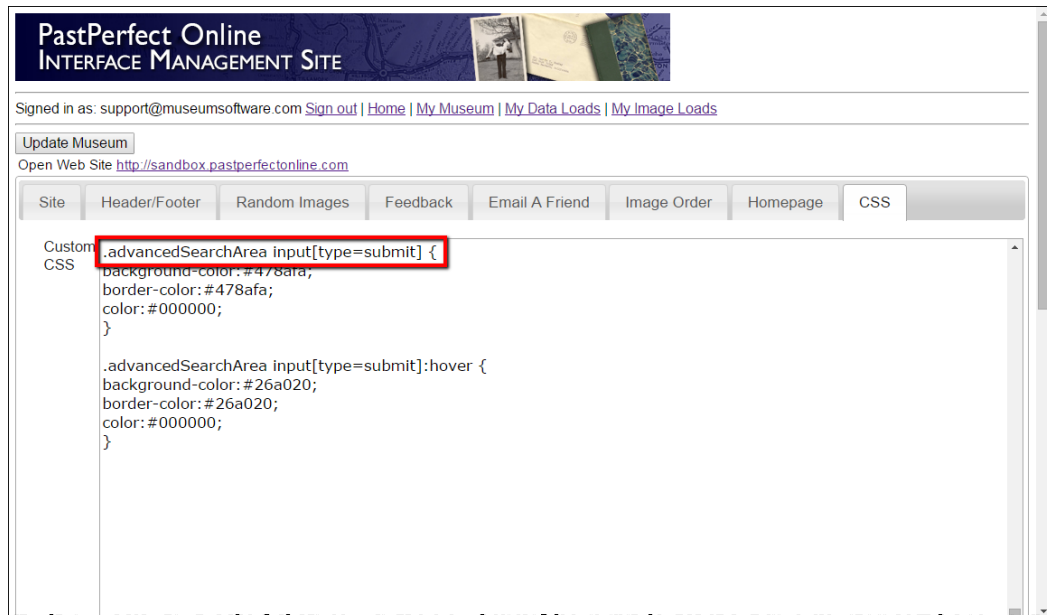
5. To change the color of the Search button when you hover over it, locate the `.topSearchArea input[type=submit]:hover` element.



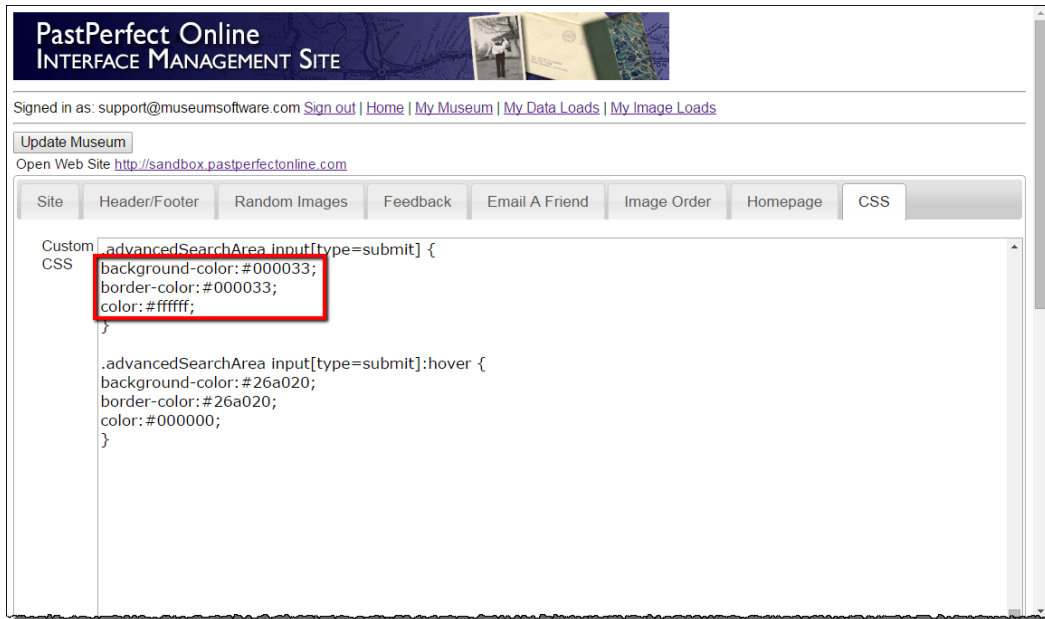
- To change the colors, replace the hex codes to the right of each property with the hex code of your choice. Be sure to leave the "#" and ";" before and after the hex code.
 - background-color** - color of the button
 - border-color** - color of the border around the button
 - color** - color of the text of the button



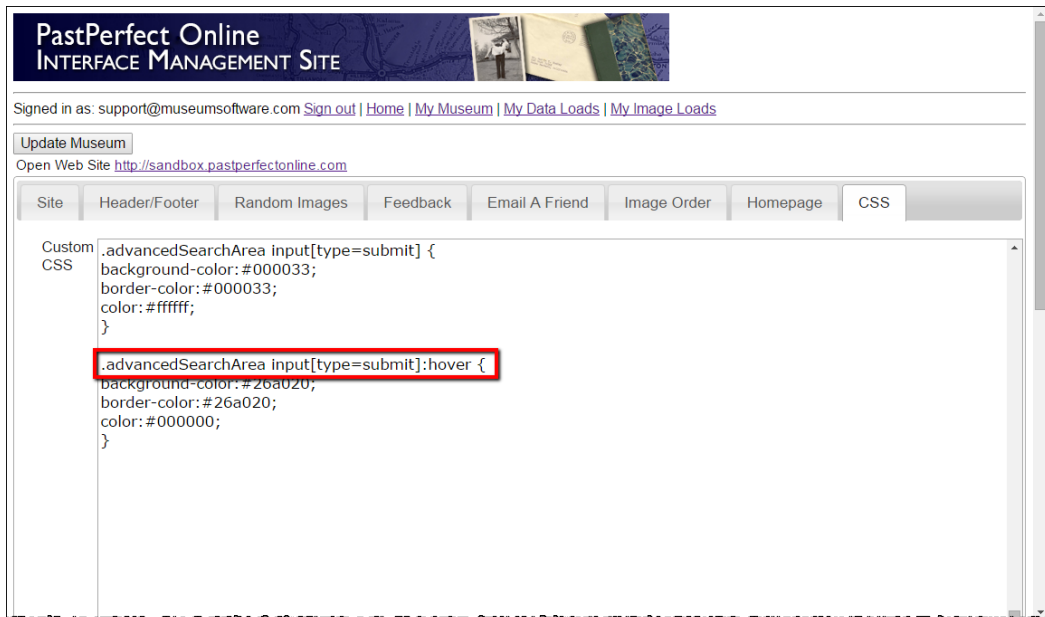
- Locate the **.advancedSearchArea input[type=submit]** element. This is the "Search" button that appears on the Advanced Search page.



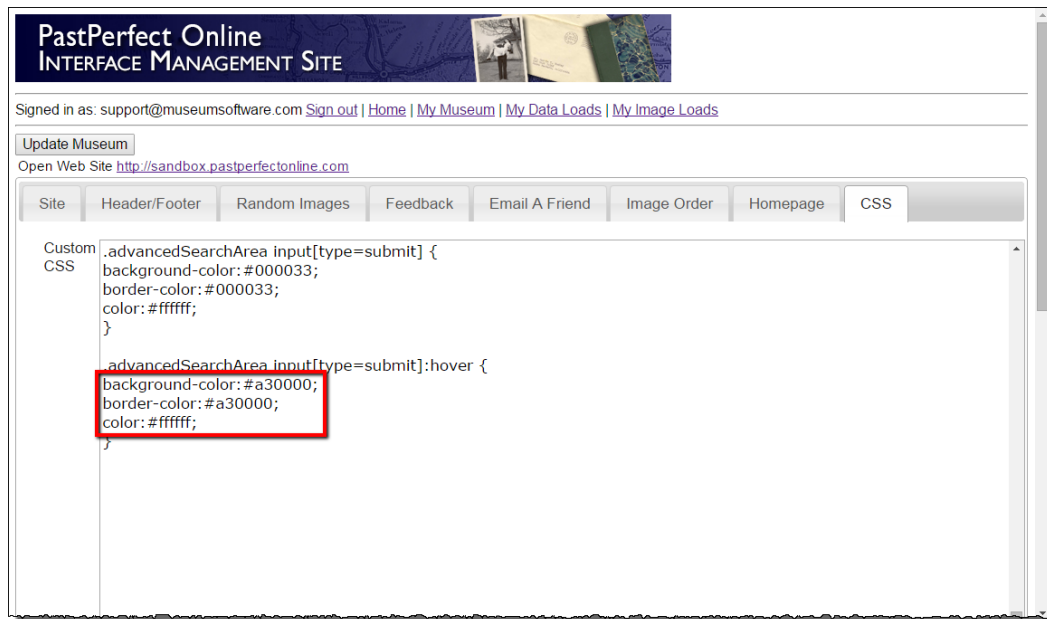
8. To change the colors, replace the hex codes to the right of each property with the hex code of your choice. Be sure to leave the "#" and ";" before and after the hex code.
 - o **background-color** - color of the button
 - o **border-color** - color of the border around the button
 - o **color** - color of the text of the button



9. To change the color of the Search button when you hover over it, locate the **.advancedSearchArea input[type=submit]:hover** element.



10. To change the colors, replace the hex codes to the right of each property with the hex code of your choice. Be sure to leave the "#" and ";" before and after the hex code.
 - o **background-color** - color of the button
 - o **border-color** - color of the border around the button
 - o **color** - color of the text of the button



11. Click the **Update Museum** button at the top or bottom of your page to save the changes.
12. Click the **Open Web Site** link at the top of the page to view your changes.

Reference

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Interface Management Site - CSS Tab](#)
- [HTML Color Picker](#)

Styling the Footer

Concept

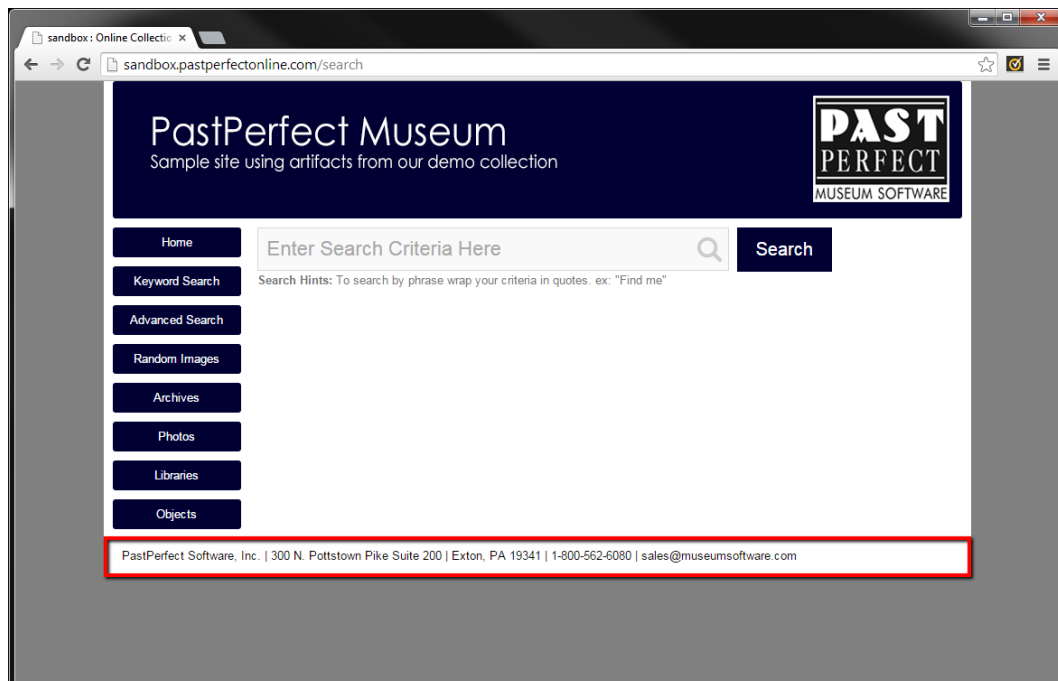
The footer appears at the bottom of each page of your PastPerfect Online site. Changes or additions to the information in the footer, as well as styling for individual lines of text, are made in the Header/Footer tab. Changes to the overall appearance of the footer are made in the CSS tab of the Interface Management Site.

In the Custom CSS field, you will see colors are represented by a six-digit hex code/value. For help selecting a color and finding the hex code, see the HTML Color Picker link listed under Reference.

Warning: *Making changes to the CSS will alter the appearance of your site, and if done incorrectly could cause the site to lose all styling.*

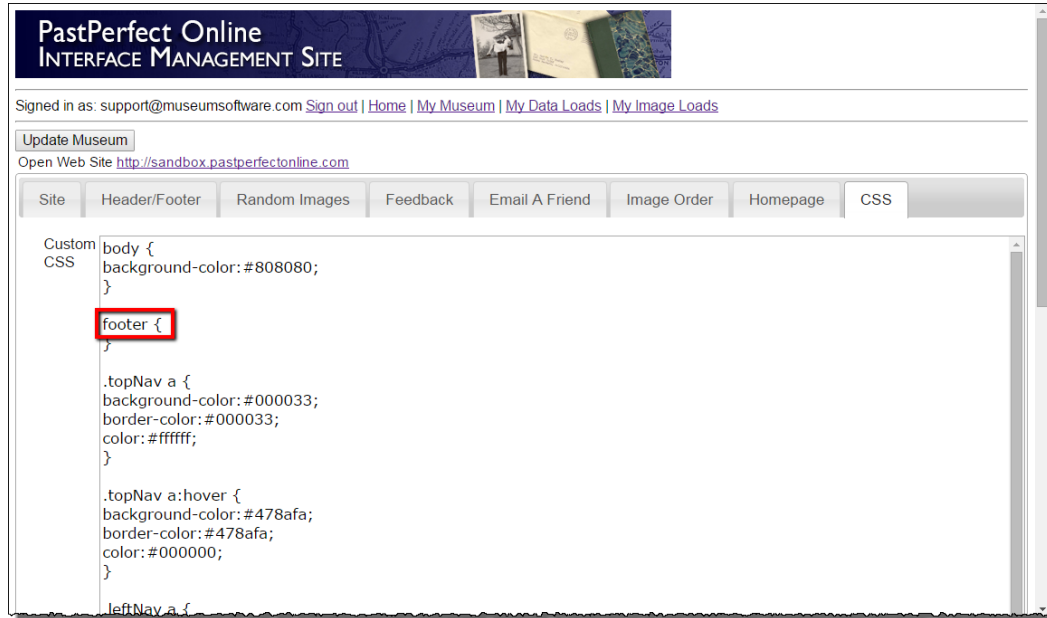
Task

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **Header/Footer** tab.
3. Add or change the information in the **Footer Text** field.
4. Click the **Update Museum** button at the top or bottom of the page. Then click the **Open Web Site** link at the top.
5. Without any styling, the footer will have black text, aligned to the left, and a white background.

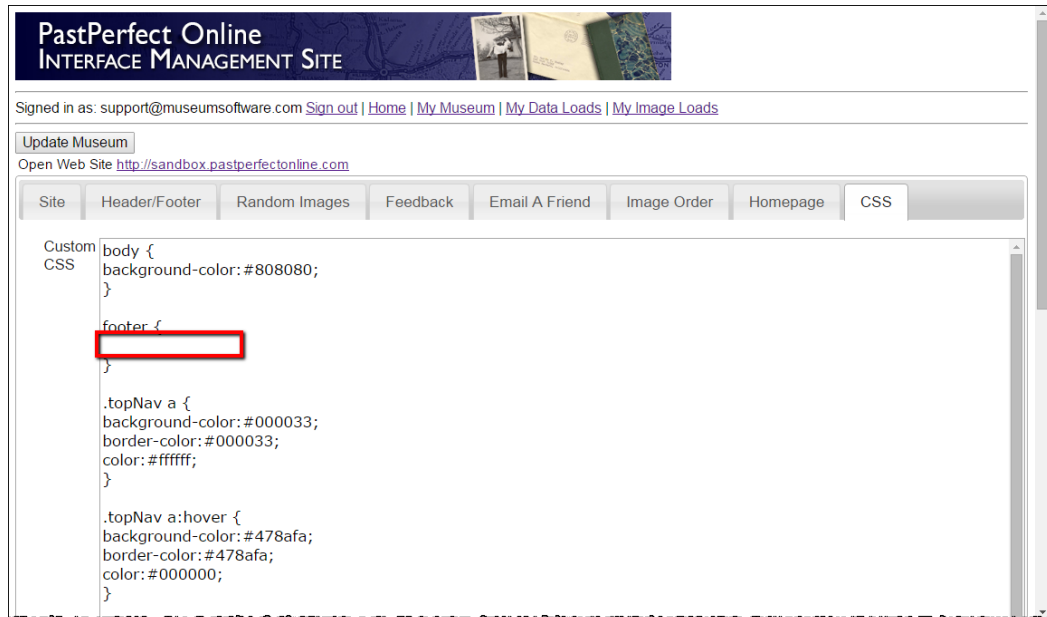


6. Return to the Interface Management Site and select the **CSS** tab.

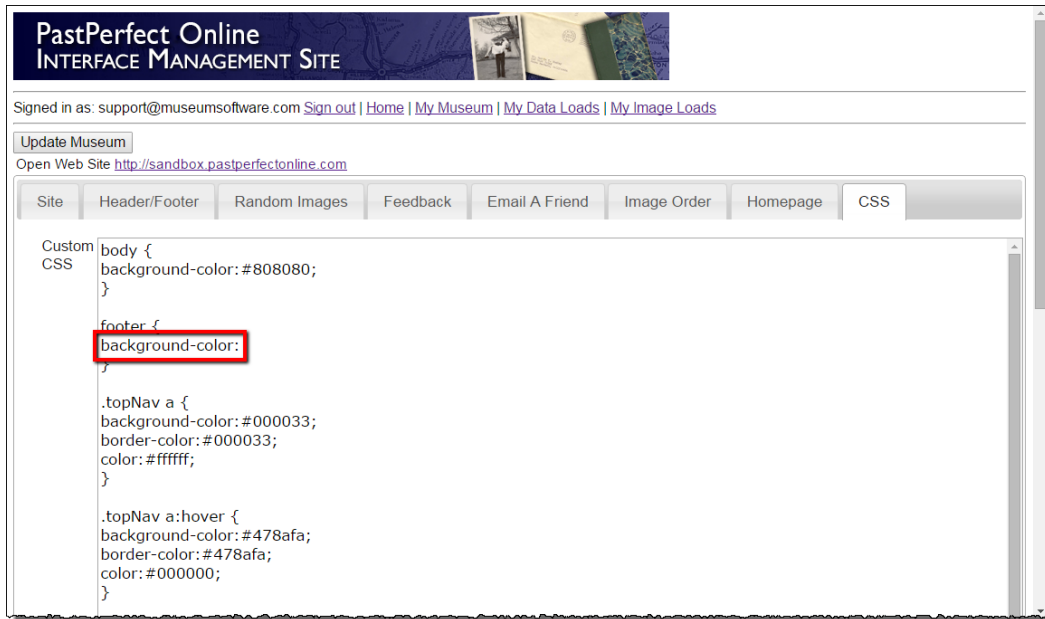
7. Locate the **footer** element. Without any properties between the brackets, the footer has no styling.



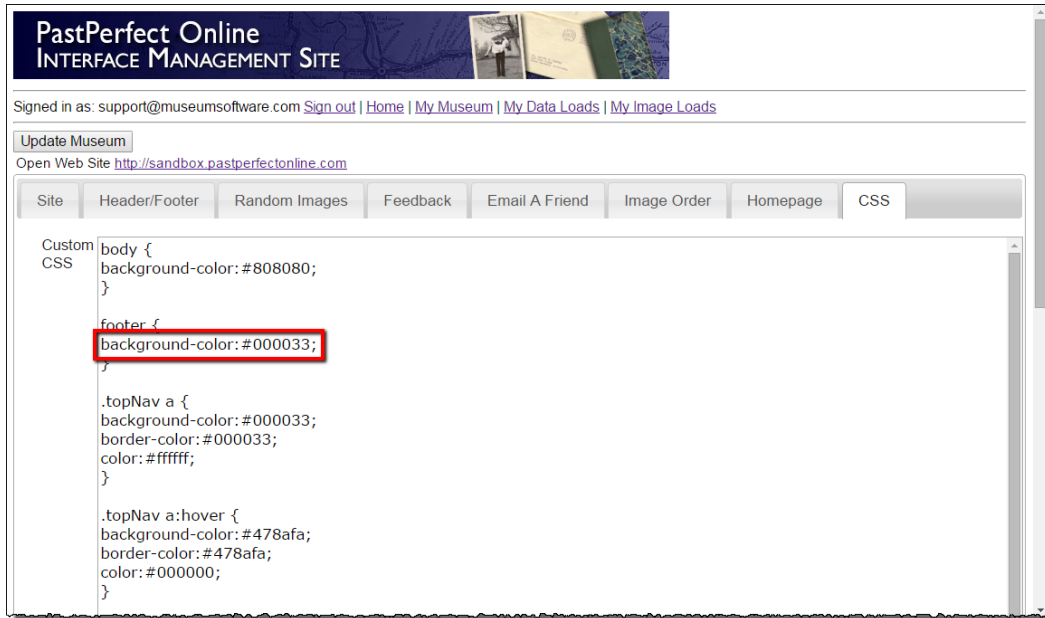
8. Place your cursor after the "footer {" and press the **Enter** key on your keyboard to start a new line.



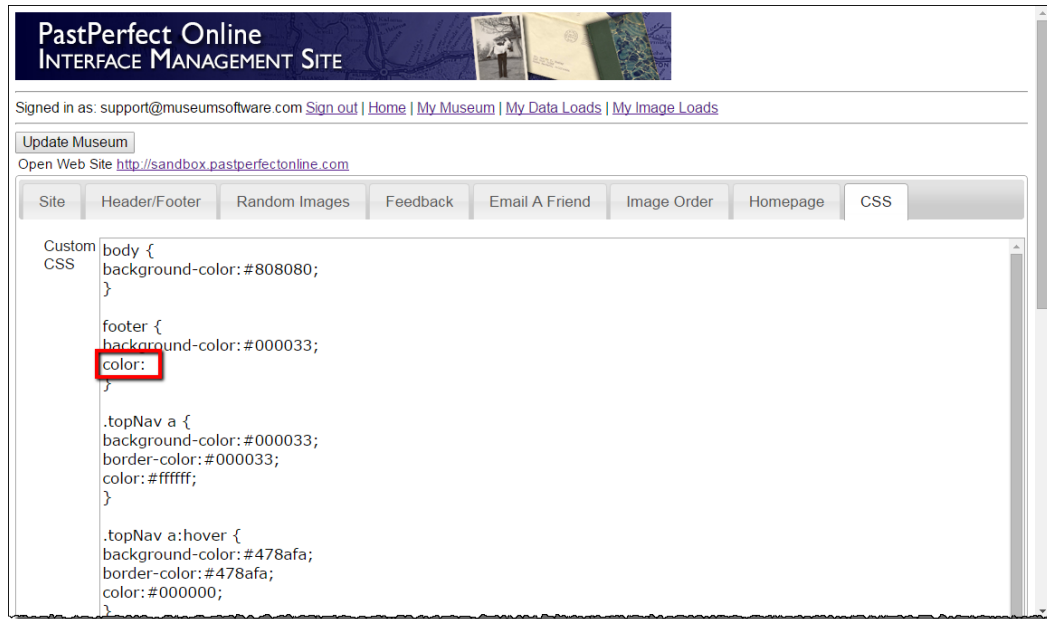
9. To change the background color of the footer, type in the following:
background-color:



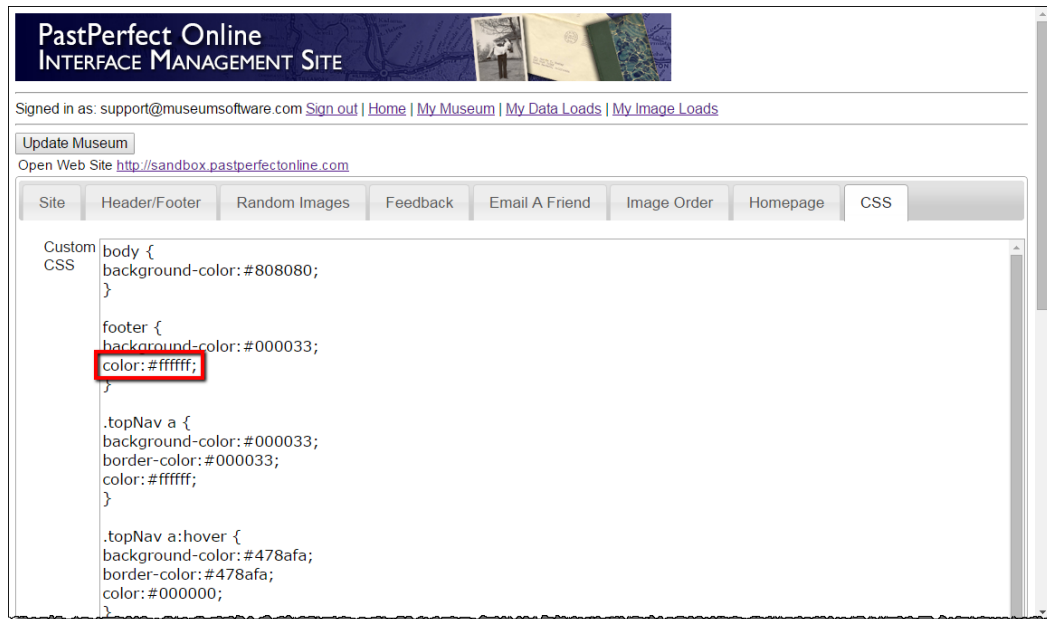
10. After the colon, type a pound sign, followed by the six-digit hex code for the color you want to use, followed by a semicolon.



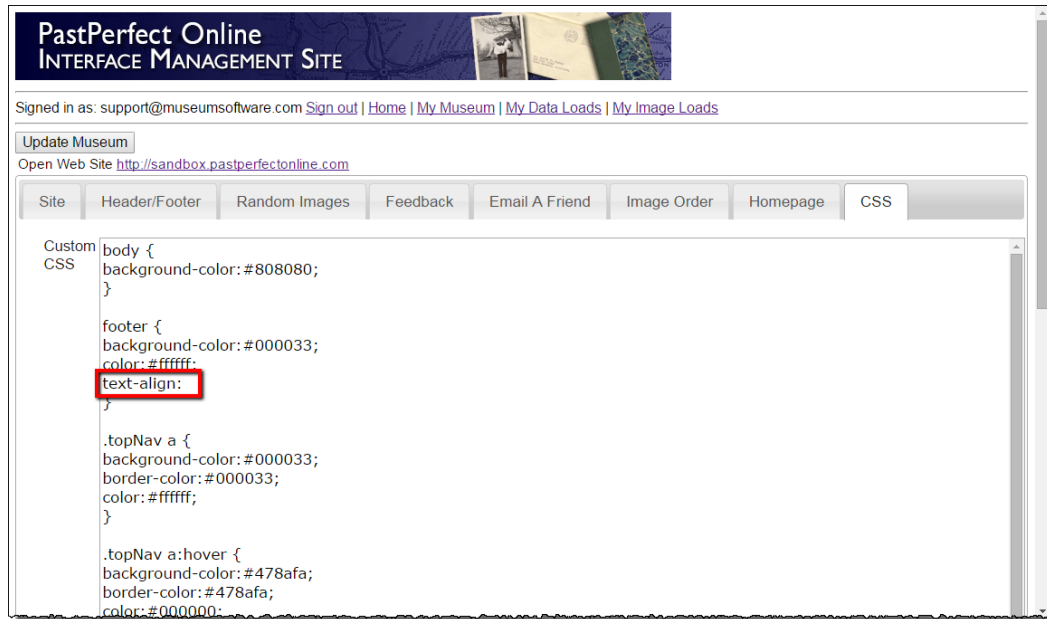
11. Press **Enter** on your keyboard to start another line and type the following:
color:



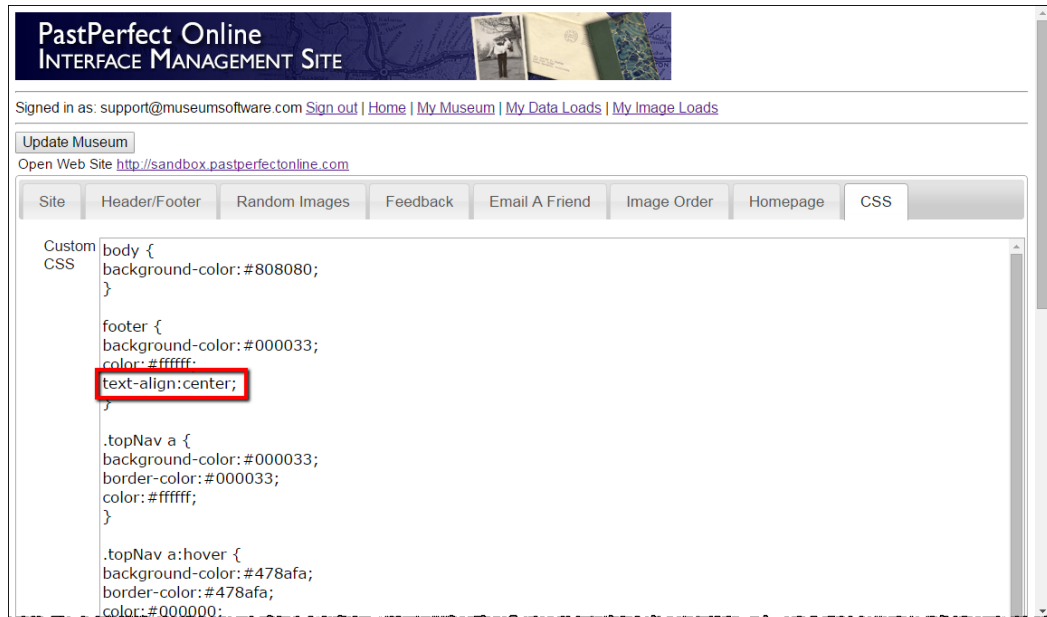
12. After the colon, type a pound sign, followed by the six-digit hex code for the color you want to use for the text of the footer, followed by a semicolon.



13. By default, the contents of the footer will be left aligned. To change to a center alignment, press **Enter** on your keyboard to start another line and type the following: **text-align:**

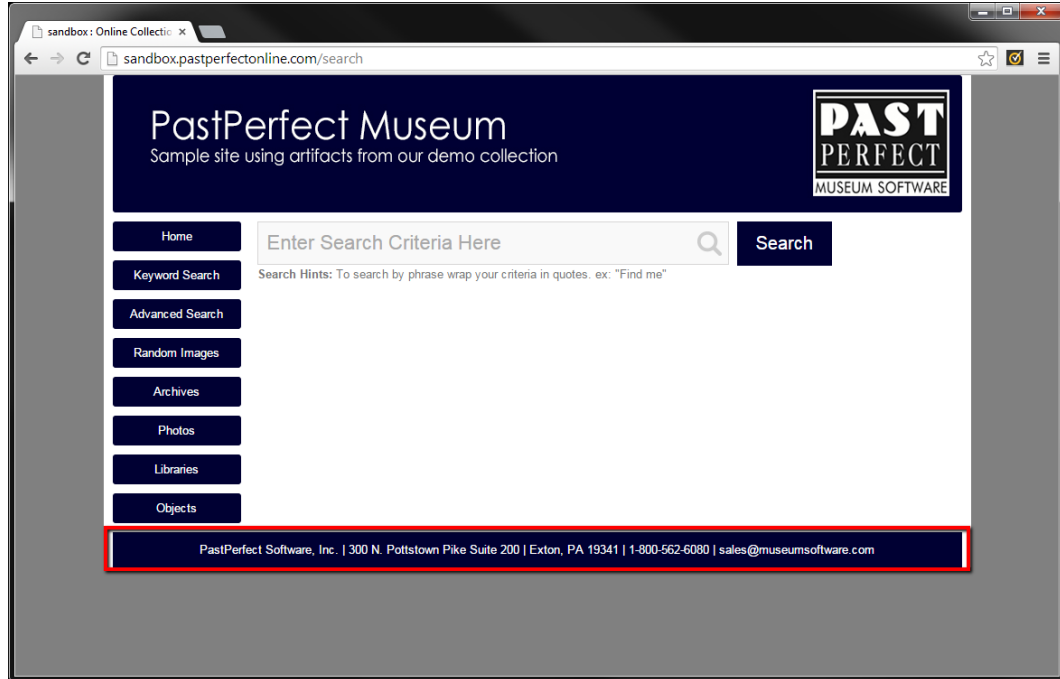


14. After the colon, type the following: **center**;



15. Click the **Update Museum** button at the top or bottom of your page to save the changes.

16. Click the **Open Web Site** link at the top of the page to view your changes.



Reference

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Making IMS Changes and Refreshing Your Site](#)
- [Interface Management Site - Header/Footer Tab](#)
- [Interface Management Site - CSS Tab](#)
- [HTML Color Picker](#)

Tech Tips

Options for Hosting Multimedia Files

Concept

Including links to multimedia files (audio, video, PDF) from your catalog records can greatly enrich your web visitor's experience. Due to the size of multimedia files, hosting for these types of files is not included in PastPerfect Online Annual Hosting. This topic discusses the various ways you can host multimedia files.

When uploading multimedia files you want to consider the file type, quality, and size so that it is optimized for web use. Large files take up more space on your web server and will take longer to load when visitors come to your site.

- **PPO Links:** Organizations using PPO Links have all of their online storage and server maintenance taken care of by PastPerfect. PPO Links is an additional hosting package, separate from your PPO Annual Hosting. Provided in blocks of 10 GB, organizations can purchase as much or as little hosting space as they need for their multimedia files. Additional space can be purchased as your collection grows.
- **Self Hosting:** Some organizations may have a server where their main website is already hosted. If so, you can check with your hosting service to see if you can store multimedia files as well. If your hosting service allows this additional hosting you will need to know the address and folder name where the files are uploaded so you can properly link to them in PastPerfect. An internal web server or hosting service such as GoDaddy.com are examples of self hosting options.
- **Online Hosting:** Specialized online hosting is available for specific file types. These hosting options may give you the ability to embed a viewer/player in your PastPerfect Online record in addition to having a link. PastPerfect cannot and will not guarantee the validity, longevity, or copyright practices of these external hosting sites or Internet users who visit them. Youtube.com and SoundCloud.com are examples of specialized online hosting options.

References

- [Linking to Multimedia Files Hosted on Remote Servers](#)
- [Embedding Audio Files in your PastPerfect Online Records](#)
- [Embedding Video Files in your PastPerfect Online Records](#)
- Product Page: [PPO Links](#)

Linking to Multimedia Files Hosted on Remote Servers

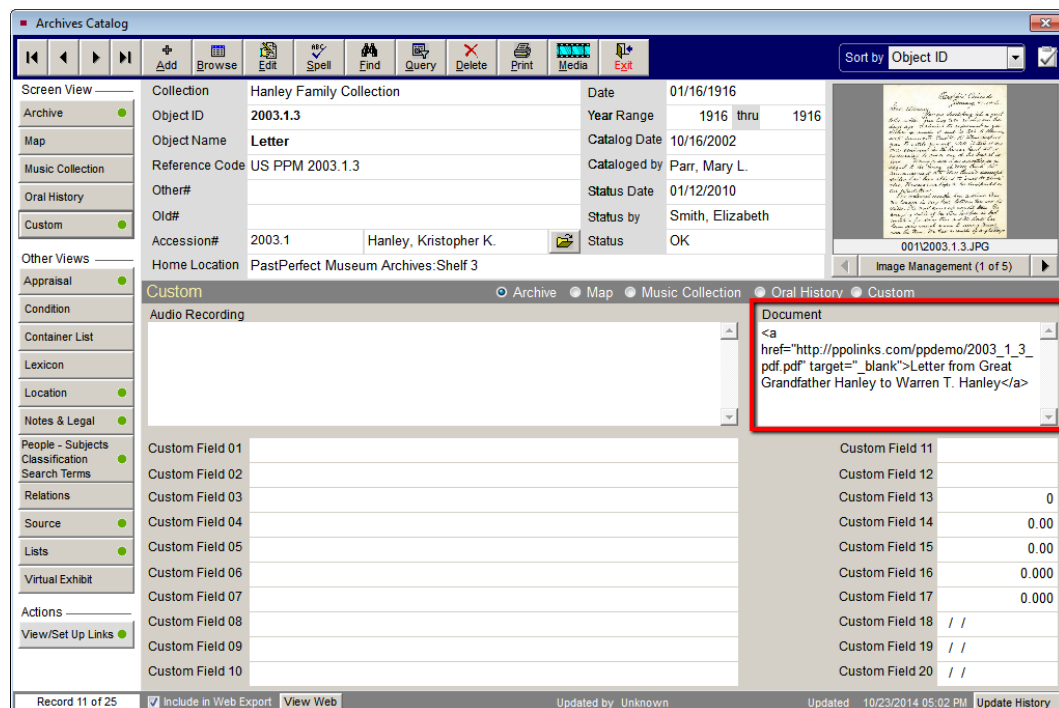
Concept

Before you begin working in PastPerfect to create links to multimedia files, make sure your files are uploaded properly and accessible online. Information about hosting options can be found in the References section at the end of this topic. You will need to know the URL for your files so that you can enter the information into your PastPerfect catalog records.

Task

1. In PastPerfect, choose a Custom Field to act as the location for all your hosted multimedia links. We suggest using Custom Field 21 or Custom Field 22. Information about setting up Custom Fields can be found in the References section of this topic.
2. Locate the PastPerfect record where you want to include a link.
3. Enter the HTML hyperlink for your media file in the Custom Field you designated for your multimedia links. The HTML will look similar to the example below.

```
<a href="http://ppolinks.com/ppdemo/2003_1_3_pdf.pdf"
target="_blank">Letter from Great Grandfather Hanley to Warren T.
Hanley</a>
```



4. The next time you go through the Web Publishing Wizard to create and upload files, be sure that your Custom Field is selected as a field to include online and renamed as you want it to appear on your site.

5. Your PastPerfect Online record will display as shown in the example below.

The screenshot shows a web browser window displaying a PastPerfect Online record. The browser address bar shows the URL: `sandbox.pastperfectonline.com/archive/23198E3E-8082-4E6A-AD29-344918037275`. The page header includes the 'PastPerfect Museum' logo and the text 'Sample site using artifacts from our demo collection'. A navigation menu on the left contains buttons for Home, Keyword Search, Advanced Search, Random Images, Archives, Photos, Libraries, and Objects. The main content area is titled 'Archive Record' and features a thumbnail of a handwritten letter on the left. To the right of the thumbnail is a metadata table:

Object Name	Letter
Catalog Number	2003.1.3
Title	Letter from Major Harold W. Hanley to Warren Hanley
Scope & Content	Letter from Major Harold W. Hanley to his son, Warren Hanley, regarding life in the remote mining town of Camp Bird in the mountains of Colorado. The author recounts two incidents. The first is of a young man, Wilfred Noel, attempting to ski and snowshoe to town to cash his paycheck and getting lost along the way. The second incident is about a man who became ill with a high fever and had to be treated using "heroic measures".
Creator	Hanley, Harold W.
Document	Letter from Great Grandfather Hanley to Warren T. Hanley
Collection	Hanley Family Collection

Below the metadata table is a detailed description of the letter's content, which is partially obscured by the table. The 'Document' field in the table is highlighted with a red rectangular border.

References

- [Options for Hosting Multimedia Files](#)
- Information about setting up Custom Fields can be found in the [PastPerfect User Guide](#).
- [Web Publishing Wizard - Selecting Data Fields](#)

Embedding Audio Files in Your PastPerfect Online Records

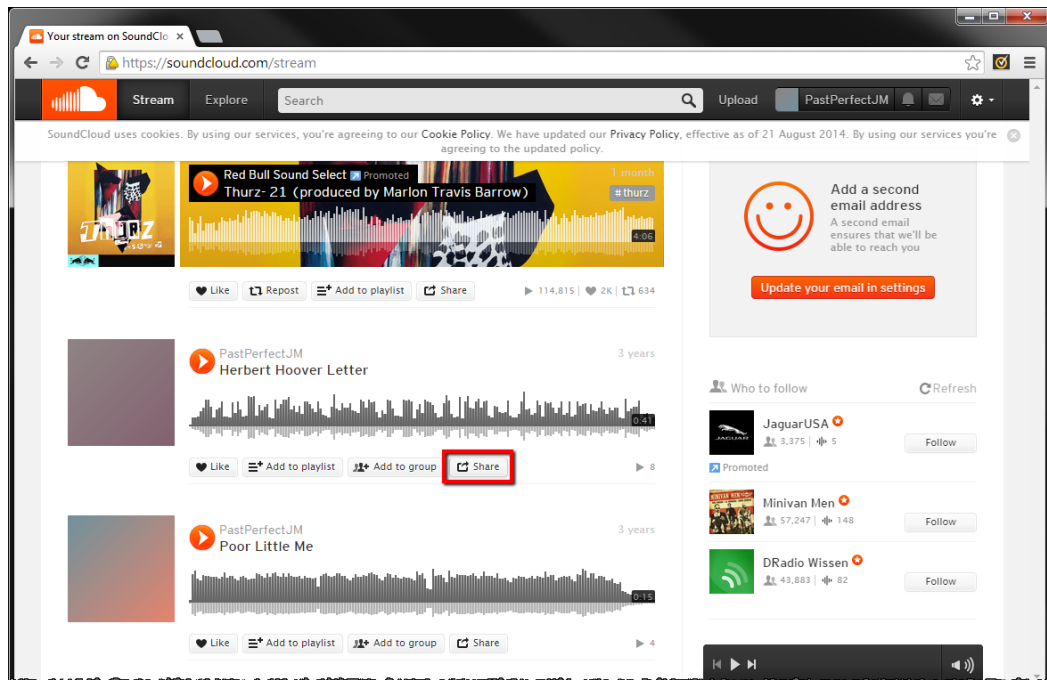
Concept

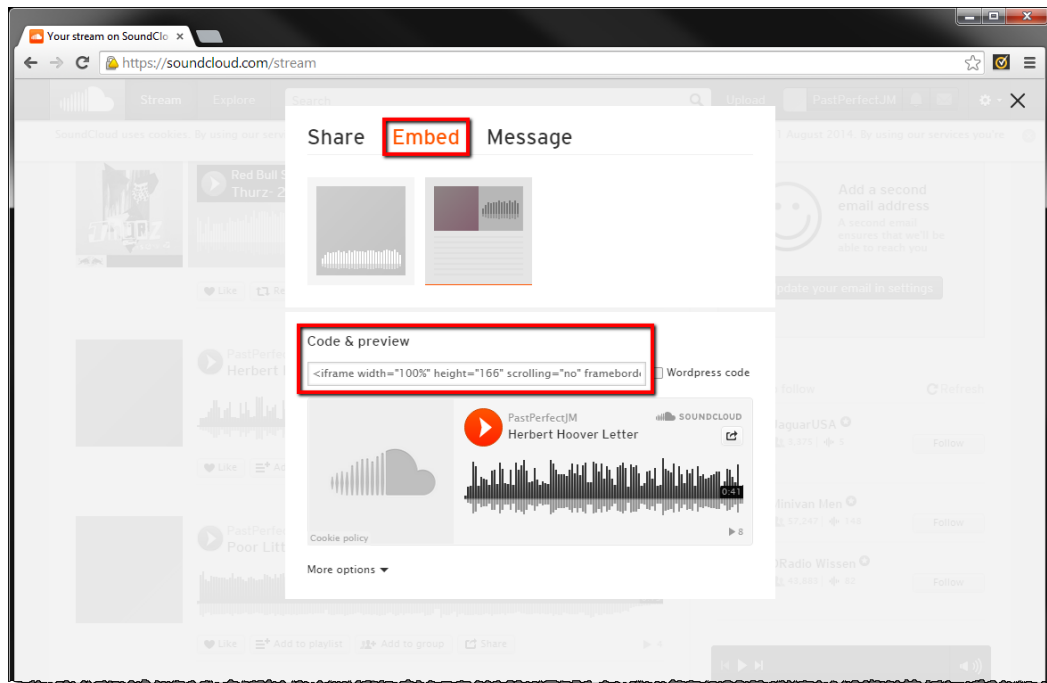
Embedded audio files on your site will bring your records to life in a whole new way. Visitors can hear your music collection or oral history projects without ever having to leave your site.

The first step to embedding audio files in a PastPerfect Online record is to upload the file to a website for hosting. We will use [SoundCloud](https://soundcloud.com) as our example, but there are other file hosting sites available. When considering a hosting service, be sure it will fit your needs. Some of them are free while others may have fees. The site may have restrictions on file sizes, limits on total amount of storage space, or a policy that removes files if they are not accessed during a specific period of time.

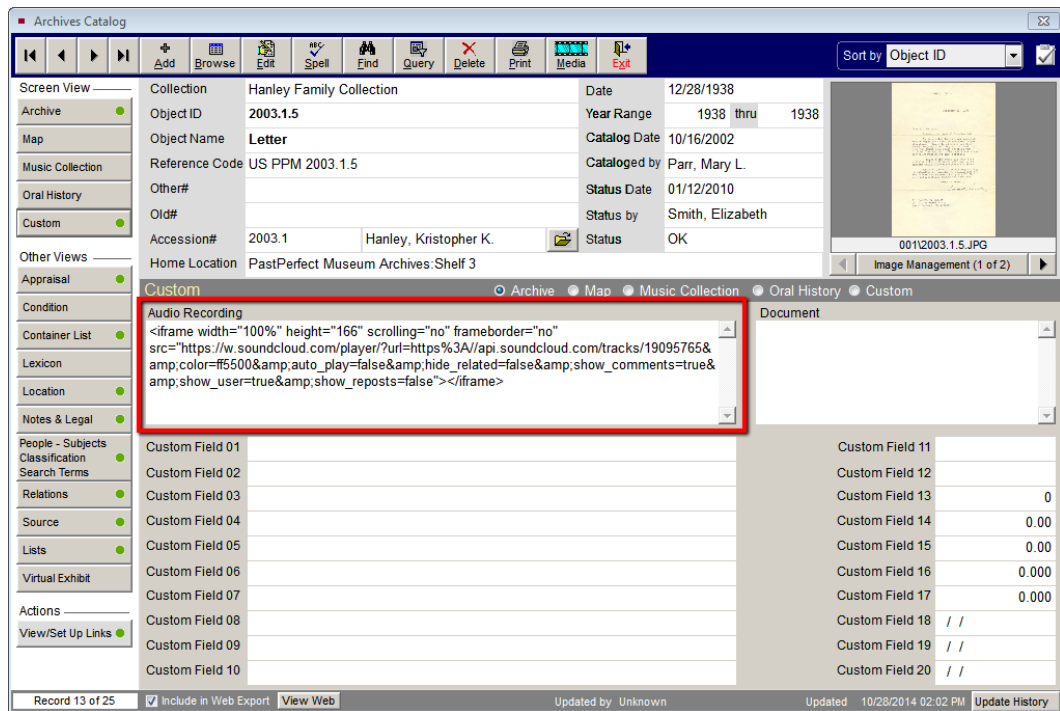
Task

1. Upload your audio file to SoundCloud.
2. Locate the HTML code for embedding the audio player.

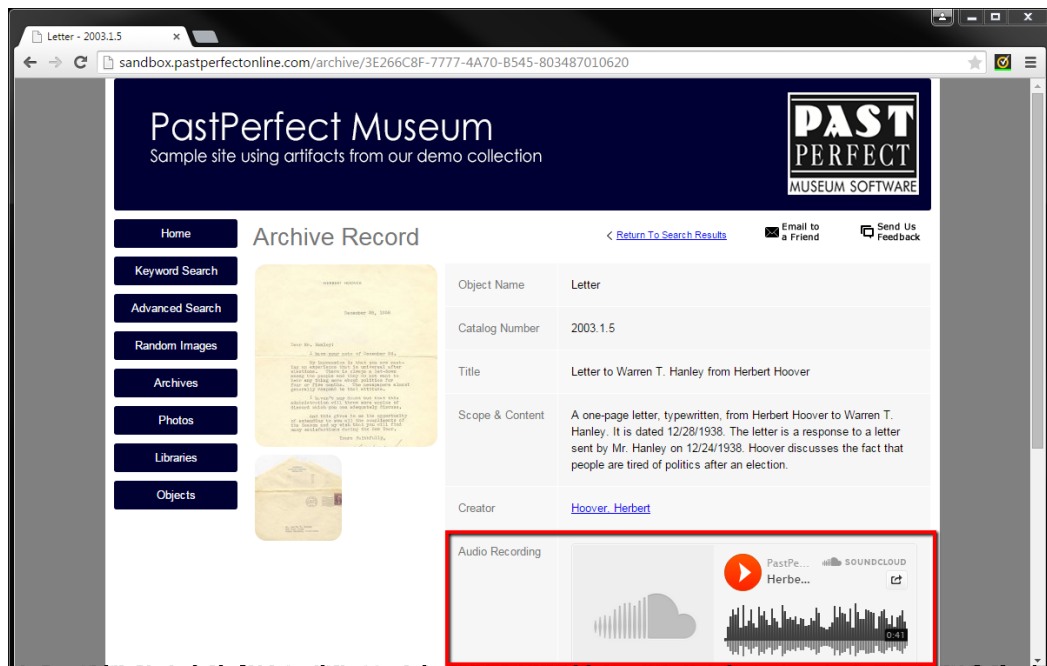




PastPerfect Online User's Guide



7. The next time you go through the Web Publishing Wizard to create and upload files, be sure that your Custom Field is selected as a field to include online and renamed as you want it to appear on your site.
8. Your PastPerfect Online record will look similar to the example below.



References

- [SoundCloud Help Center](#)
- Information about setting up Custom Fields can be found in the [PastPerfect User Guide](#).
- [Web Publishing Wizard - Selecting Data Fields](#)

Embedding Video Files in your PastPerfect Online Records

Concept

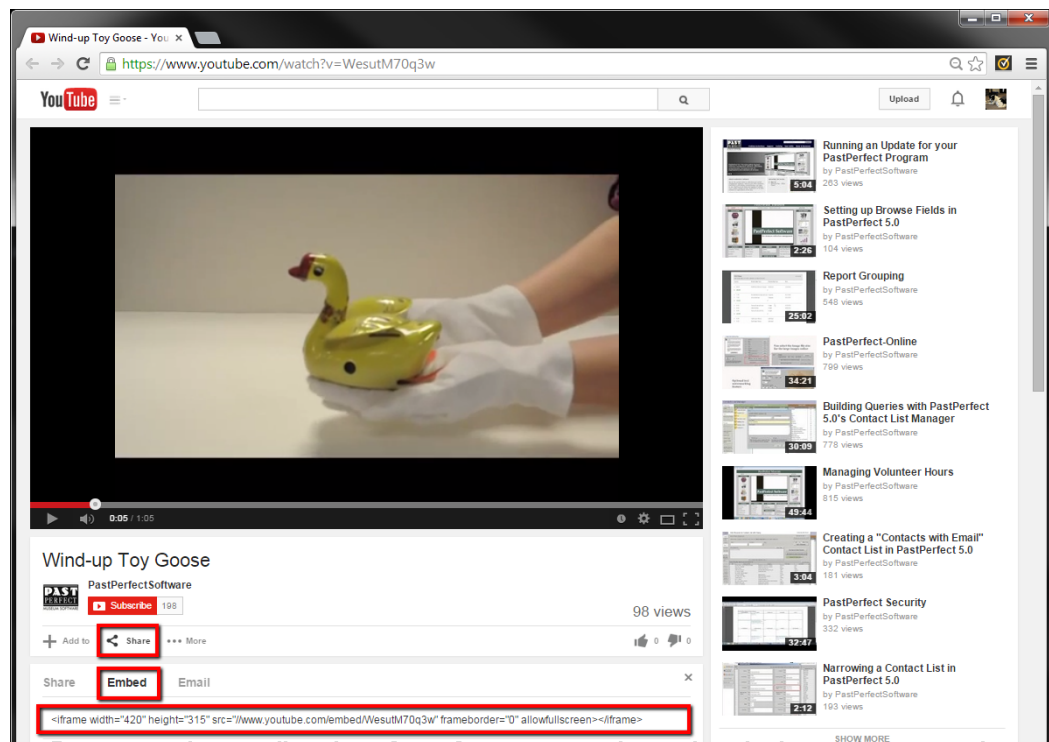
With PastPerfect Online you can embed videos directly in the collection item record so online visitors can not only read about the item and see images, but view a video as well.

The first step to embedding a video in a PastPerfect Online record is to upload the file to a website for hosting. We will use [YouTube](#) as our example. You may need to create a YouTube account in order to upload videos. Information about creating an account and uploading videos can be found in the References section of this topic.

Task

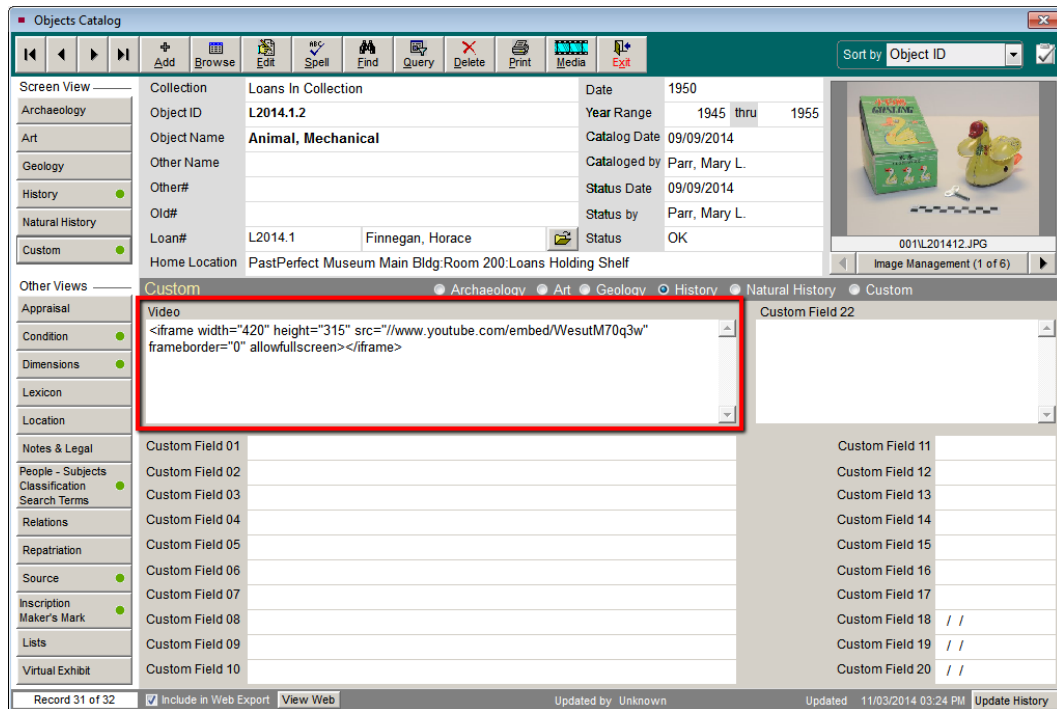
1. Upload your video to YouTube.
2. Once the file has been uploaded, YouTube will provide you with an HTML code for embedding the video in your catalog record. Copy this HTML so you can paste it into the PastPerfect catalog record. The HTML will look like the following example:

```
<iframe width="420" height="315" src="//www.youtube.com/embed/WesutM70q3w?rel=0" frameborder="0" allowfullscreen></iframe>
```

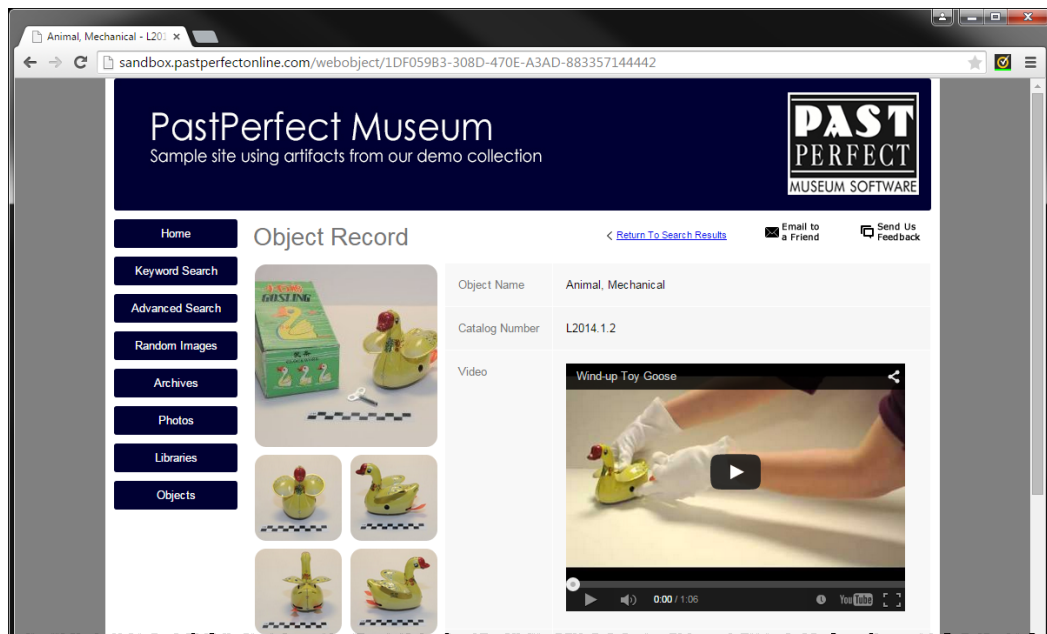


3. In PastPerfect, chose a Custom Field to act as the location for all your multimedia links. Since these links can be quite long, we suggest using Custom Field 21 or Custom Field 22. Information about setting up Custom Fields can be found in the References section of this topic.

4. Locate the record in PastPerfect associated with the video.
5. In the Custom Field that you chose in step 3, paste in the HTML you copied from the YouTube page.



6. The next time you go through the Web Publishing Wizard to create and upload files, be sure that your Custom Field is selected as a field to include online and renamed as you want it to appear on your site.
7. Your PastPerfect Online record will look like the example below.



References

- YouTube Help article: [Sign up for an account](#)
- YouTube Help article: [How to upload videos](#)
- Information about setting up Custom Fields can be found in the [PastPerfect User Guide](#).
- [Web Publishing Wizard - Selecting Data Fields](#)

Setting Up Quick Response (QR) Codes

Concept

Generating QR codes for your PastPerfect Online records will allow any visitor with a mobile device to scan your code and be taken directly to your PastPerfect Online webpage dedicated to that artifact. QR codes can be used to enrich gallery exhibits or create mini-exhibits at off-site locations like local libraries, schools or parks. QR codes allow visitors to view items in your collection quickly and easily, even while on the go. There are two ways to generate QR codes: using an online generator tool or using PastPerfect's built-in tool. This topic will discuss setting up PastPerfect's built-in tool.

Task

1. From the Main Menu of PastPerfect click **PastPerfect-Online**.
2. Click the **Next** button.
3. Click the **Publish Files to Web** button.
4. Confirm that the **Hosting URL** field is populated with the PPO Site Address located on your Welcome Letter. Ensure that the Hosting URL ends with a / .

The screenshot shows the 'Web Publishing Wizard' window with the 'Publish Files to Web - PPOL2' step selected. The interface includes a sidebar with steps: 'Select Data Fields to Include', 'Customize Field Names', 'Advanced Search Categories', 'Browse Files Before Publishing', 'Create Web Publishing Files', and 'Publish Files to Web'. The main area contains an information icon and text: 'Once all Web Publishing Files are created, upload them to the Web server using HTTP file transfer. Select file types to upload, and click Upload to Website Now to start the transfer.' Below this are fields for 'Local Folder' (C:\PP5WebExport), 'Upload data URL' (http://pastperfectonline.com/dataupload), 'Upload Images URL' (http://pastperfectonline.com/imageupload), and 'Upload Host' (pastperfectonline.com). A red box highlights the 'Hosting URL (used for printing QRcode labels)' field, which contains 'http://demo.pastperfectonline.com/'. There are also checkboxes for 'Data Files' and 'Images', and a 'View Upload Log' button. At the bottom right is an 'Upload Data and Images to Website' button and navigation buttons for 'Back', 'Next', and 'Exit'.

5. Once confirmed, return to the Main Menu of PastPerfect. The next topic will discuss ways of printing QR Code Labels.

References


- [Understanding Your Welcome Letter](#)

- [Printing QR Codes for PastPerfect Online Records](#)

Printing QR Codes for PastPerfect Online Records

Concept

Quick Response (QR) Codes allow for easy access to collection records for visitors with mobile devices. QR codes can be printed from individual catalog records or from catalog lists.

<p>Print, Photographic</p> <p>Harley, Clair N. 1945</p> <p><i>Japanese Plane at Luzon Airfield</i></p> <p>An American naval officer, Jack Tangney, examines an abandoned Japanese aircraft on the Luzon Airfield after it was captured in 1945. The plane is in very poor condition and there are palm trees in the background. Handwritten note in pencil on back of photo reads, "Luzon Air strip - Jan 1945".</p> <p>2003.1.6</p>	
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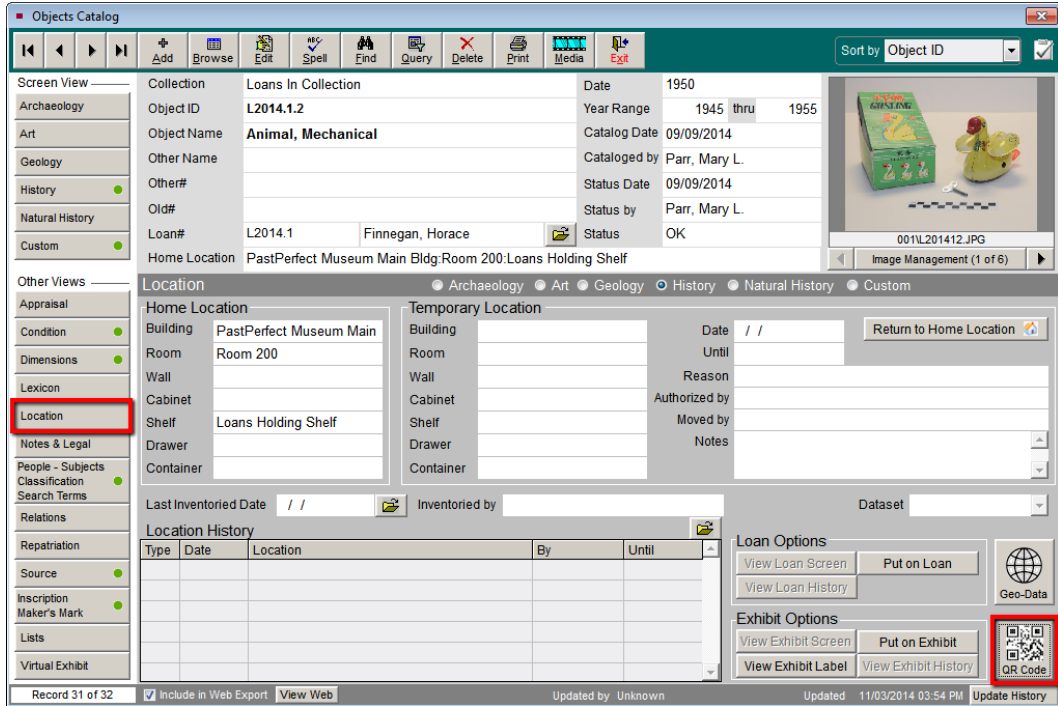
NOTE: You must follow the steps in the [Setting Up Quick Response \(QR\) Codes](#) topic before you can print QR codes for catalog records.

Task

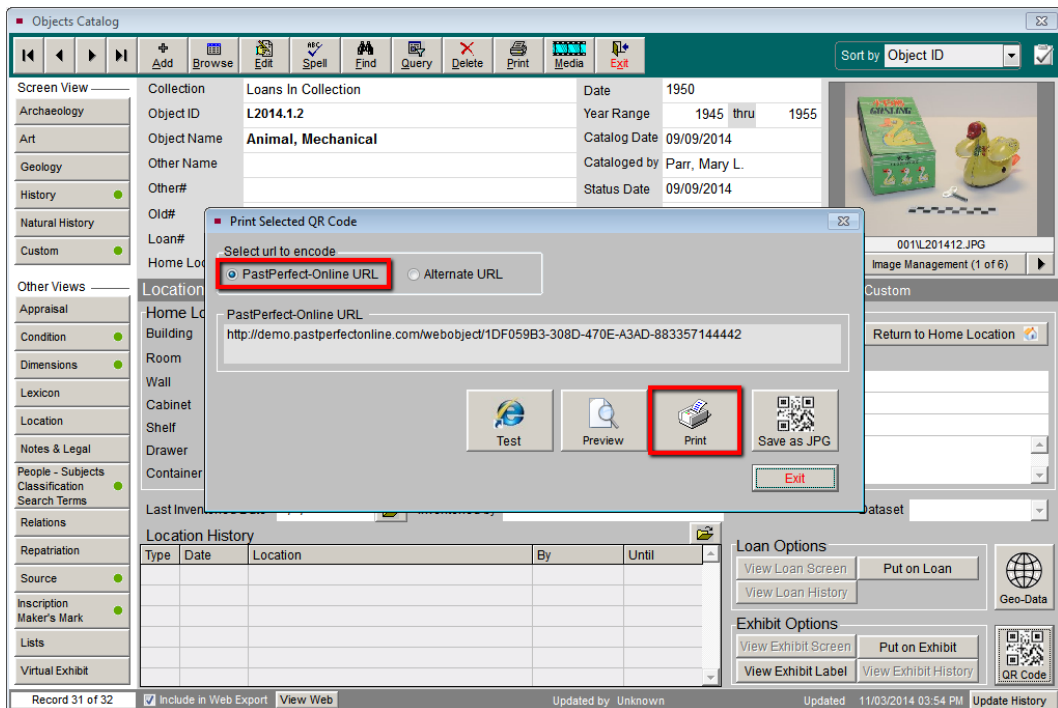
Printing QR Codes from Individual Catalog Records

1. Locate a catalog record that is selected for web export.
2. Click the **Location** button on the sidebar.

3. In the lower right corner of the Location screen, click **QR Code**.



4. Select the **PastPerfect-Online URL** radio button to see the web address for the artifact. Click **Print**.



5. Test your printed QR Code Label to ensure the record is available online and displays correctly.

Printing QR Codes from a Catalog List

It is important to note that QR codes will be printed for all items on the list even if the item has not been chosen to be included online.

1. Open a catalog list and click the **Print List** button.

View List

View Details

View Records

View Images

Map Locations

Print/Export List

Print List

Export to Excel

Actions

Add to an Exhibit

Add to a Loan

Change Location

Global Change

Include on Web

Remove from Web

Build Relationship

Mark Inventoried

Print Inventory Worksheet

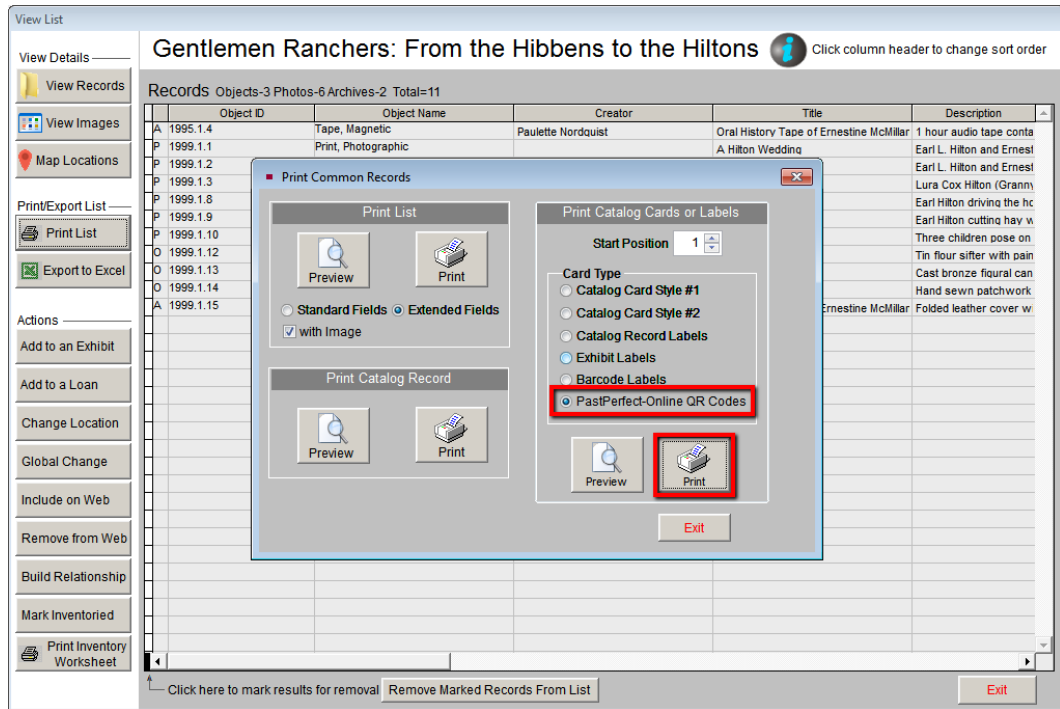
Gentlemen Ranchers: From the Hibbens to the Hiltons Click column header to change sort order

Records Objects-3 Photos-6 Archives-2 Total=11

	Object ID	Object Name	Creator	Title	Description
A	1995.1.4	Tape, Magnetic	Paulette Nordquist	Oral History Tape of Ernestine McMillar	1 hour audio tape conta
P	1999.1.1	Print, Photographic		A Hilton Wedding	Earl L. Hilton and Ernest
P	1999.1.2	Print, Photographic		Our Family	Earl L. Hilton and Ernest
P	1999.1.3	Print, Photographic	Hilton, Clarence Lester	Granny's Turkeys	Lura Cox Hilton (Grann)
P	1999.1.8	Print, Photographic		Putting Up Hay	Earl Hilton driving the hc
P	1999.1.9	Print, Photographic		Mowing Hay	Earl Hilton cutting hay v
P	1999.1.10	Print, Photographic		Hay Truck	Three children pose on
O	1999.1.12	Sifter, Flour		Flour Sifter	Tin flour sifter with pain
O	1999.1.13	Candlestick		Staq Candlestick	Cast bronze figural can
O	1999.1.14	Quilt	McMillan, Lucinda	Lucinda Quilt	Hand sewn patchwork
A	1999.1.15	Album, Autograph		Autograph Album of Ernestine McMillar	Folded leather cover w

Click here to mark results for removal Remove Marked Records From List Exit

2. Select the option for **PastPerfect-Online QR Codes** under Card Type, then click the **Print** button.



3. Follow the prompts for your selected printer dialog box if applicable.
4. Test your printed QR Code Label to ensure the record is available online and displays correctly.

References

- [Setting Up Quick Response \(QR\) Codes](#)

Ways to Share Your Website

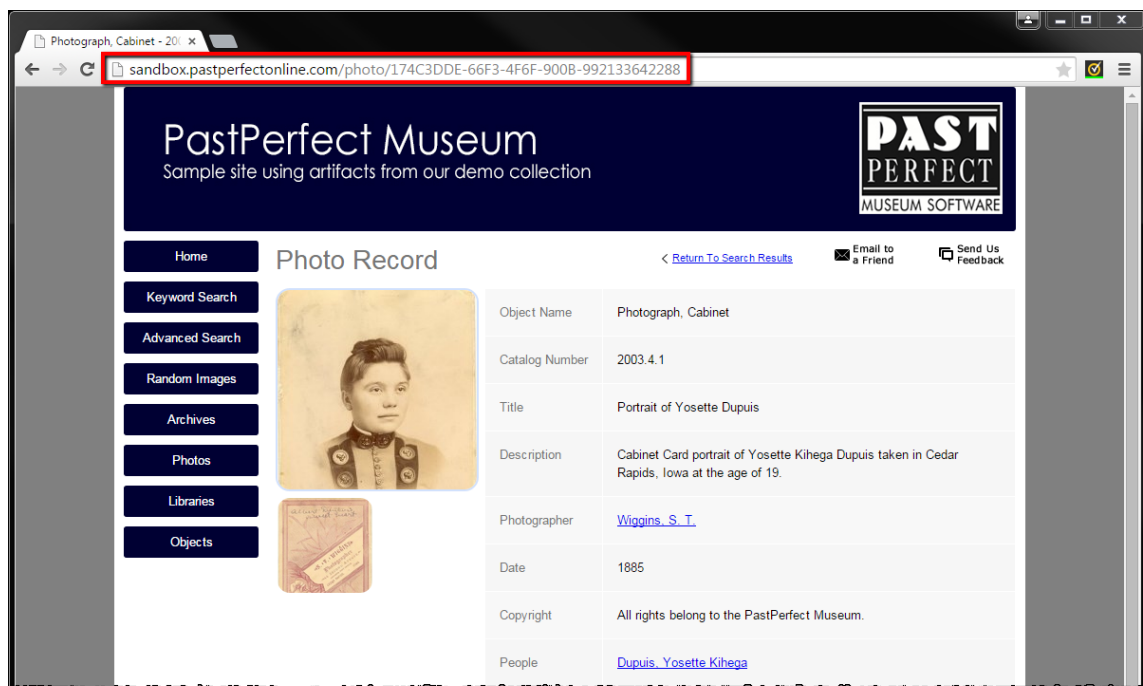
Concept

The more websites that link to your PastPerfect Online website, the more exposure your collection will have. In addition to having a link to your site from your museum's home page, you can use Facebook and Twitter to highlight featured collection items.

You may also want to consider setting up a custom email signature or creating a blog as additional ways to share your PastPerfect Online website. This topic will focus on sharing your collections with Facebook and Twitter.

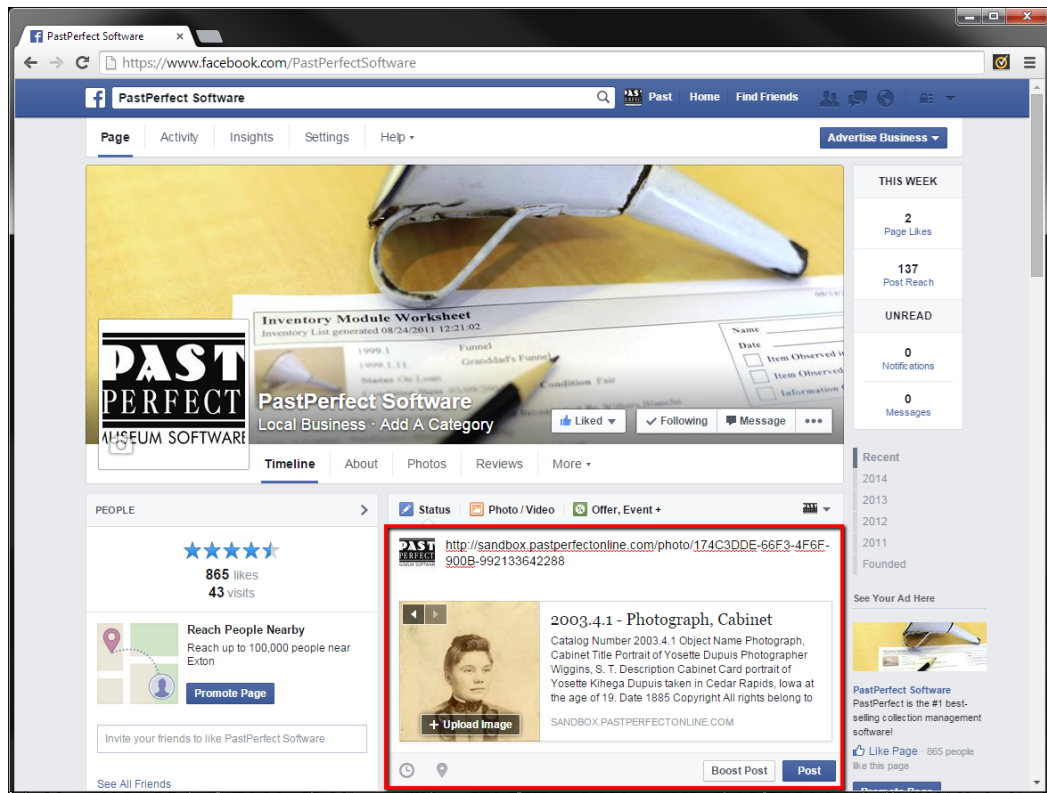
Task

When sharing collection items using Facebook or Twitter, begin by locating a record from your PastPerfect Online site that you would like to share and then copying the URL for the record.



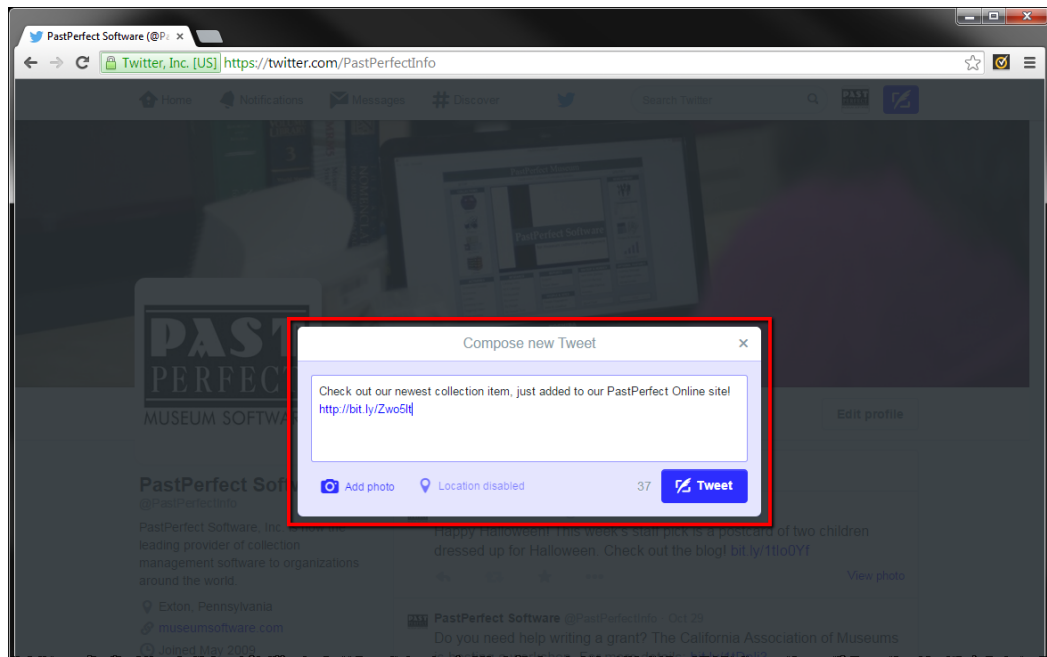
Sharing with Facebook

1. Go to your organization's Facebook page and paste the link for your collection item into a new post.
2. In addition to listing the URL, Facebook may include a thumbnail image of the item and create a brief description by combining information from the record's fields.



Sharing with Twitter

1. Twitter has a 140 character limit for tweets, so the entire URL for your record will not fit. Use an online URL shortening tool to shrink your URL. There are many tools available for free online, a few are listed in the References section at the end of this topic.
2. Log into your Twitter account and create a new Tweet with your shortened link.



References

- Common URL shortening tools:
 - [bitly](#)
 - [tinyURL](#)
 - [Ow.ly](#)

Search Engines and Statistics

Adding Google Analytics to Your PastPerfect Online Records

Concept

Google Analytics is used to track visitors and monitor site usage. Many organizations already have a Google Analytics account and simply need to add the code to the footer field through the Interface Management Site to have PastPerfect Online pages tracked in Analytics. You may decide to start a new Analytics account specifically for your PastPerfect Online site. We suggest consulting with your web team before making decisions regarding Google Analytics.

Task

Instructions for signing up for a Google Analytics account is best documented at: <http://www.google.com/analytics/>

1. Sign in to <http://admin.pastperfectonline.com>.
2. Select the **Header/Footer** tab.



3. Place your Google Analytics code into the **Footer Text** field, being careful not to overwrite any of the additional text that might already be in that field. Take care to make sure you have the entire script from Google in the field. The text should start with `<script>` and end with `</script>`.



4. Click the **Update Museum** button at the top or bottom of your page to save your changes.

References

- [Accessing Your Interface Management Site \(IMS\)](#)
- [Interface Management Site - Header/Footer Tab](#)
- Search Reporting

Glossary

C

Cascading Style Sheet (CSS): File or series of files that contain parameters to determine how a website will render on a screen. CSS can also be contained within a webpage and is modified in PastPerfect Online on the CSS tab of the Interface Management Site.

Catalog Record: PastPerfect Objects, Photos, Archives, or Library record.

Container List Record: Record of the containers that house items of an Archives record. These containers often have additional descriptive and arrangement information not repeated in the parent Archive record

Creator Record: Record for the Artist, Author, Creator, Photographer, etc. of an item in PastPerfect. These records can contain an image of the creator, as well as biographical information.

E

Email Forms: Three interactive forms that can be enabled on your PastPerfect Online site: Feedback form, Email to a Friend form, and Image Request form.

F

Footer: Area at the bottom of your PastPerfect Online site, below all other page content. Often contains contact information for your museum, tips for searching, copyright statements, etc.

G

Google Analytics: Service of Google that provides information about the visitors of your PastPerfect Online site.

Google Indexing: Service provided by PastPerfect to submit your catalog records to Google for indexing. This service allows your catalog records to be displayed as search results in the world's most popular search engine.

H

Header: Area at the top of your PastPerfect Online site, above the navigation buttons. Can be used to insert text or a clickable logo to direct visitors to your main website.

Hex Code (Color): Combination of six values representing a specific color. Valid values are 0-9 and A-F. Examples of hex codes: 000000=black, 0000FF=blue, FF0000=red, and FFFFFFFF=white.

Home Page: see Landing Page

HyperText Markup Language (HTML): Formatting language used to structure and display text documents as web pages.

I

Interface Management Site (IMS): Administrative site used to control the features and display of your PastPerfect Online site. Access to IMS is only available to the Museum Manager for each organization's site.

K

Keycode: Seven digit number specific to your organization used during the installation of PastPerfect Online. This number is printed on the PastPerfect Online Upgrade CD case.

L

Landing Page (Home Page): HTML page associated with your PastPerfect Online site that can be customized through IMS to include information of your choice. Often used to welcome visitors, give instructions and recommendations for searching, as well as operating hours and contact information.

M

Mobile Device: Internet connected devices such as smartphones and tablets.

Multimedia File: Multimedia files include but are not limited to: PDFs, audio files, video files, MS-Word documents, MS-Excel files, and large archival images.

Museum Manager: Login level assigned to a member of the organization that allows access to the Interface Management Site.

N

Navigation Bar: Row of buttons at the top of many PastPerfect screens. Contains buttons to perform basic functions like editing, adding, saving, and moving between records.

Navigation Buttons: Buttons that run across the top or along the left side of your PastPerfect Online site. Navigation buttons include: Home, Keyword Search, Advanced Search, Random Images, Archives, Photos, Libraries, and Objects.

O

OPAL: Abbreviation for the four catalogs: Objects, Photos, Archives and Library

P

People Record: People Biographies record that can be linked to catalog records. These records can contain an image of the person, as well as biographical information.

Pixels (px): Unit of measurement for images. In most cases, a pixel is a single dot of color on a computer monitor.

Q

Quick Response (QR) Code: Two-dimensional barcode often used for quick access to websites that can be scanned by mobile devices. PastPerfect Online QR Codes contain the address of a catalog record's web page.

R

Responsive Design: Web design approach that provides for optimized viewing on smaller devices.

S

Search Category: Group of fields that contain similar content, set up in the Web Publishing Wizard and appears on the Advanced Search page of your PastPerfect Online site. Created by mapping multiple data fields to a single, over-arching search title.

Search Terms Record: Record for a Search Term, which can be used to provide a description of the term.

Sidebar: Left side of many PastPerfect Screens. Contains buttons that provide additional information or enable more advanced functions.

Site Logo: Image that represents your organization, added through the IMS Site Tab and will appear at the top of each page.

Site Record: Sites & Localities record that contains location information and can be linked to catalog records.

Stylized Thumbnails: Resized thumbnails to maintain a consistent aspect ratio for a more uniform display.

U

PastPerfect Online User's Guide

Uniform Resource Locator (URL): Address of a file on the internet, such as a website. Example:
<http://www.MuseumSoftware.com>

W

Watermark: Text applied to online images to reduce unauthorized use. Watermarks cannot be removed by editing software and therefore your online images become unsuitable for reproduction.

Web Publishing Wizard: PastPerfect's web publishing tool used to create and upload files for PastPerfect Online. Accessed from PastPerfect's Main Menu.

Welcome Letter: Document delivered with your PastPerfect Online software that contains important information about installing and using PastPerfect Online.

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