

PASTPERFECT-ONLINE

PastPerfect-Online is the fast, affordable and easy way to provide public access to your PastPerfect data via the World Wide Web. Built on proven MWeb™ technology, PastPerfect-Online is capable of quickly displaying hundreds of thousands of catalog records.

PastPerfect-Online is both a tool to create searchable HTML web pages and an online hosting service. You select the PastPerfect catalog records, images and data fields you want to publish, and PastPerfect-Online will build a fully searchable collections-based website.

We host your online search site for a modest annual fee. You can create a link from an existing website to the online search site. PastPerfect-Online includes a free splash page for all of the important information about your museum. You can use this page to inform your visitors of suggested search terms and methods.

PastPerfect-Online is safe. Only information from the records and fields you select will be available to the public, and your online images can be watermarked without affecting your permanent images.

No web design or programming expertise is needed to give your museum a world-class web presence.

PASTPERFECT-ONLINE FEATURES INCLUDE:

- A check box labeled “Include in Web Export” is displayed on each PastPerfect catalog record screen. Users can check or uncheck that box to choose which records they want to publish to their PastPerfect-Online site.

- Users can perform a query or create a catalog list in PastPerfect and after receiving the results, press a button to include all the resulting records for web publication.
- When records are selected for publication, either individually or by using a query or a catalog list, all associated images will automatically be selected. Each image screen will also have a check box labeled "Include in Web," thus allowing the user to publish only the images they want.
- You can use the field list to select which data fields you want to display on the web. For security, fields with values or storage locations of items will not be available for publication.
- The Web Publishing Wizard helps you easily create advanced search categories and map fields to these search categories.
- A new thumbnail and a full size image file will be created for each image that is published. All published image files will be converted to JPG format and resized for optimal web usage.
- A text watermark may be added to the full size image files when they are created.
- A built-in FTP function makes it easy for you to upload your data and images to the web server.
- Adjustments can be made to the banner, layout and colors of the web pages at any time.

INSTALLING PASTPERFECT-ONLINE

To install the PastPerfect-Online software:

1. From the Main Menu of PastPerfect, click the "Setup" button.
2. Select "System Parameters" from the drop-down list.
3. Click the "Unlock Upgrade Options" button.
4. Insert the PastPerfect-Online CD into the computer's CD-ROM drive.
5. Follow the instructions on the screen to complete the installation.

Once the program is installed, remove the CD and store it in a safe place. Be sure to also save the enclosed documents which contain your web address, user name

and passwords. You will need them when you upload your files to the server as described later in this document.

CREATING YOUR WEBSITE OVERVIEW

The following is a summary of the steps to create and post data to your PastPerfect-Online website:

1. Select the records and images you want to publish.
2. Run the Web Publishing Wizard to:
 - * Select which data fields to publish and choose the field display order.
 - * Modify field names as they will display on the web.
 - * Set up advanced search categories and map your data fields.
 - * Select which creator, people and search term files to publish.
 - * Watermark images.
 - * Create web ready data and image files.
 - * Upload files to your website.
3. Activate your website using the MWeb™ Preprocessor (PPS) from your internet browser.
4. Allow 24-72 hours for the servers to update the data, then view your site online and make final layout and style adjustments.

SELECT THE RECORDS AND IMAGES TO PUBLISH

PastPerfect-Online can publish information from these PastPerfect data tables:

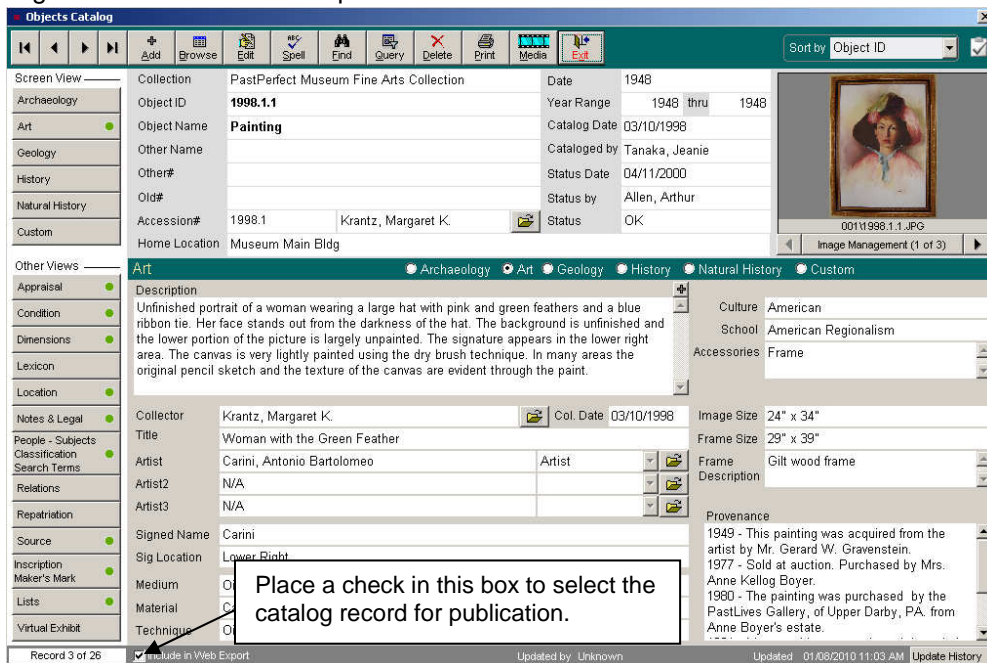
- * Object, Archive, Library and Photo catalog records.
- * Images associated with published catalog records.
- * Artist/ Author/Creator/Photographer records.
- * People Biography authority file records.
- * Search Term authority file records.

SELECTING CATALOG RECORDS TO EXPORT

You can publish all of your catalog records or just a subset. PastPerfect-Online allows you to select just the records that you want to share on the Web. After installing PastPerfect-Online, you will notice a new check box at the bottom of each catalog record labeled "Include in Web Export."

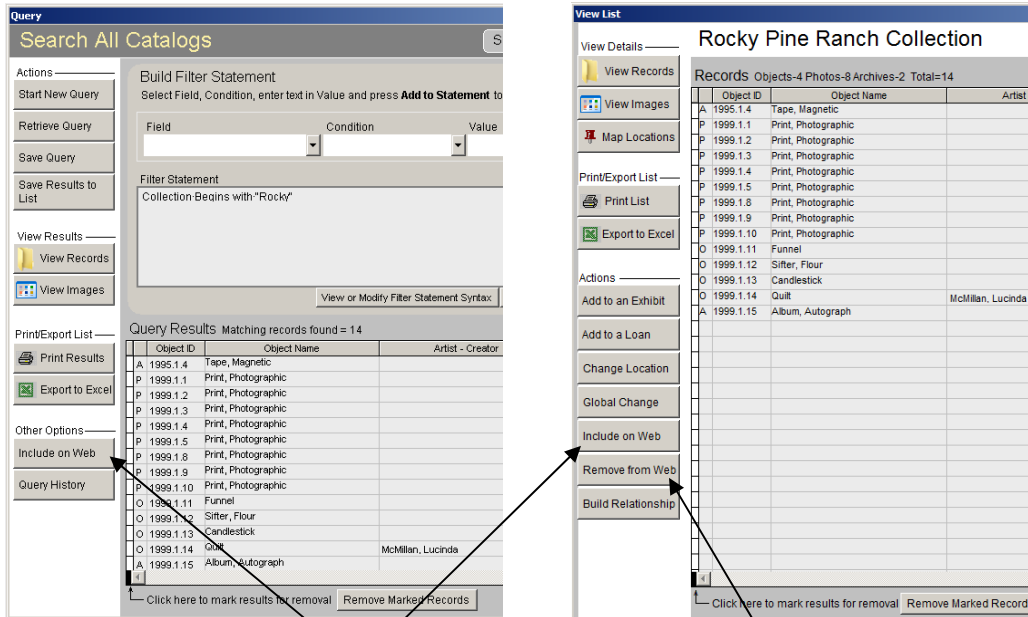
To include a record from the Objects, Archives, Library or Photos catalog, just click "Edit" at the top of the catalog screen and then check the box labeled "Include in Web Export." To deselect a record, uncheck the box and click "Save."

Figure 1: Include in Web Export check box



To speed up the selection process, you can choose a group of records to publish instead of selecting them one at a time. This group selection is accomplished by using the Research functions of PastPerfect (Query or Catalog Lists). Once the results are listed in a query or once you're viewing the records on a catalog list, you will see a button in the Sidebar labeled "Include on Web." Clicking that button will check the box labeled "Include in Web Export" for each catalog record selected by the query.

Figure 2: Select multiple records by Query or by Catalog List



After performing a query or when viewing the records on a catalog list, click the button labeled "Include on Web."

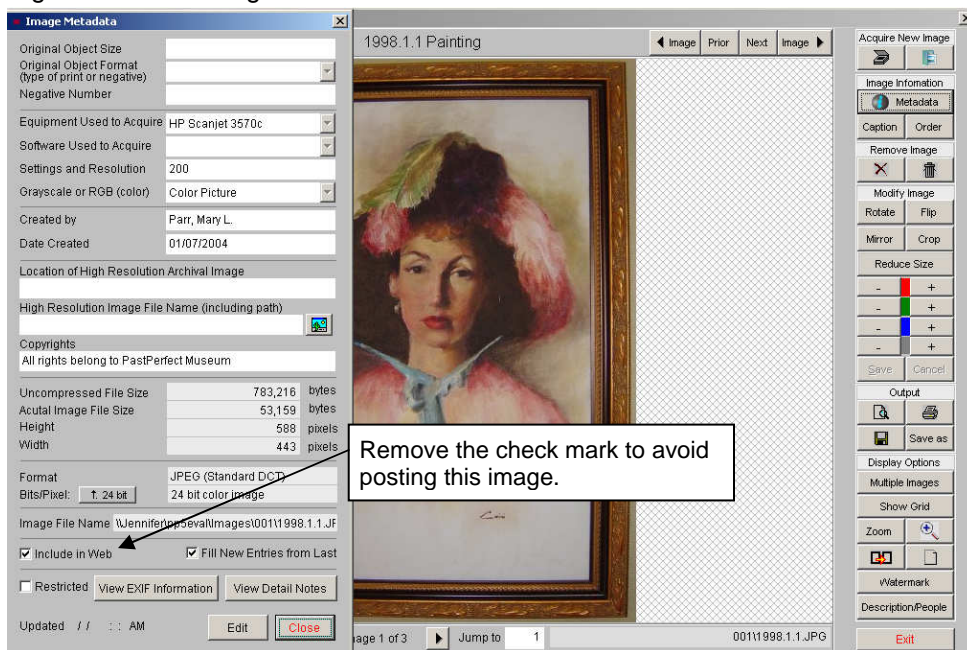
To remove a group of records from being published, you can put the items on a catalog list, and then click the "Remove from Web" button.

TIP If you want to select ALL catalog records for publication, this can be done with one button from the Browse Files screen in the Web Publishing Wizard described later.

SELECTING IMAGES TO EXPORT

When you select a catalog record, as described above, all images associated with that record are automatically designated to be published. In some cases, when records have multiple images, you may not want all images included. This adjustment can be made from the Image Management screen. Locate the catalog record, then click the "Image Management" button. Next click the "Metadata" button to the right of the image. The Image Metadata subscreen will display. Notice the check box labeled "Include in Web" at the bottom of the Image Metadata subscreen. Click "Edit" and remove the check for any images you do not want to publish to your PastPerfect-Online website, then click "Save."

Figure 3: Select images to include



New web image files are created for each image you select to publish. These files will be resized and optimized for the web, making the published image unsuitable for quality printing. To further protect your valuable images, you can also add a text watermark. This process is described later and shown in Figures 8 and 9. In either case, your archival and discovery images in PastPerfect will not be changed in any way. Only web-published images are watermarked and resized.

RUN THE WEB PUBLISHING WIZARD

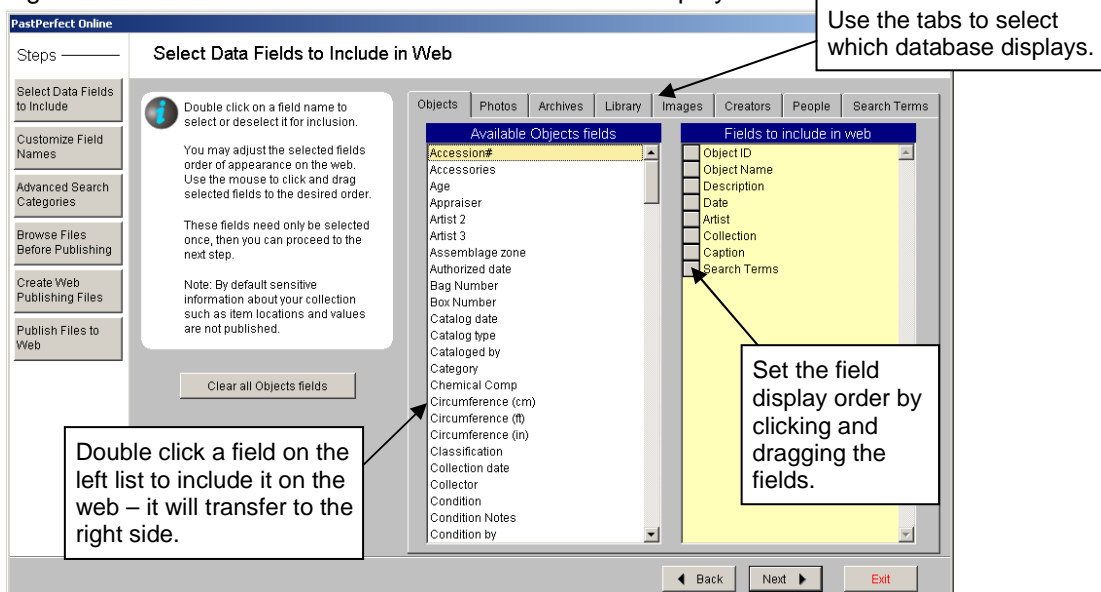
Once you have selected the catalog records and images, simply run the Web Publishing Wizard. This will create the files you need to upload to the web server. To start the wizard, select "PastPerfect-Online" from the PastPerfect Main Menu. Once the Web Publishing Wizard opens, click the "Next" button to proceed.

SELECTING DATA FIELDS TO PUBLISH & SETTING FIELD DISPLAY ORDER

The screen in Figure 4 displays all data fields for each catalog. Select the fields you wish to publish by double clicking on each field you want under the Available Fields column. You can select specific fields for each database by using the tabs across the top.

You can also select the order in which the data fields will display on the web pages. To do this, click on a field name you want to move in the Fields to Include in Web column. That field will be highlighted in blue and the gray box to its left will turn into an up/down arrow. Click the gray box and drag the field up or down to the new desired position.

Figure 4: Select data fields to include and set the field display order

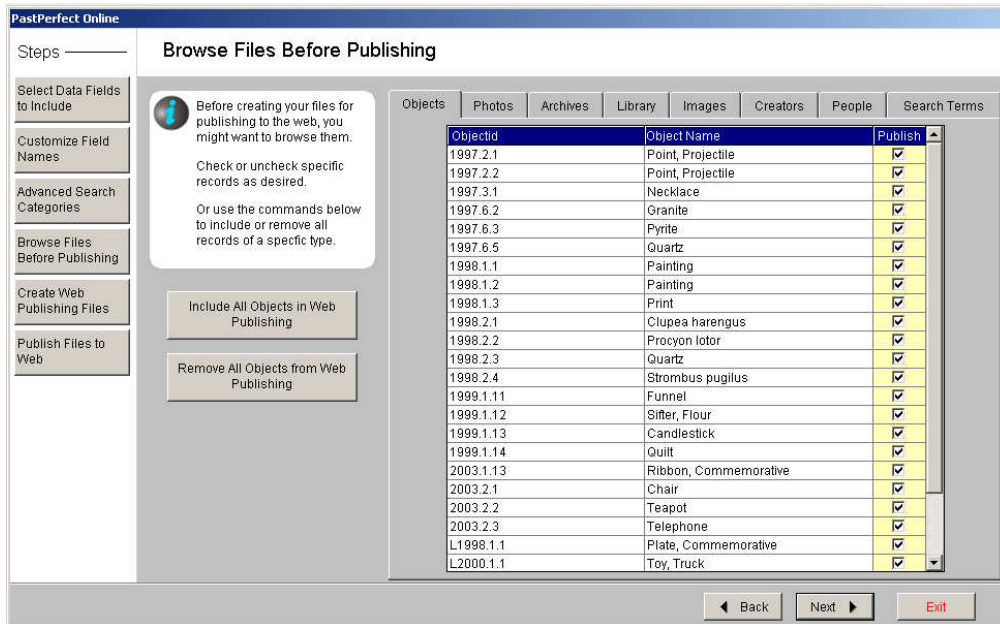


BROWSE FILES

The next screen, shown in Figure 7, allows you to view which records and images have been selected for export. Click on the tab for the database you wish to browse. The tab will list all records from the selected database that are marked for export. If you want to remove a record from the list, uncheck the box in the Publish column.

On the left, there are two more buttons. You can click: "Include All in Web Publishing" to mark ALL of the records from the selected database to publish, or "Remove All from Web Publishing" to remove all of the records for the selected database from being published.

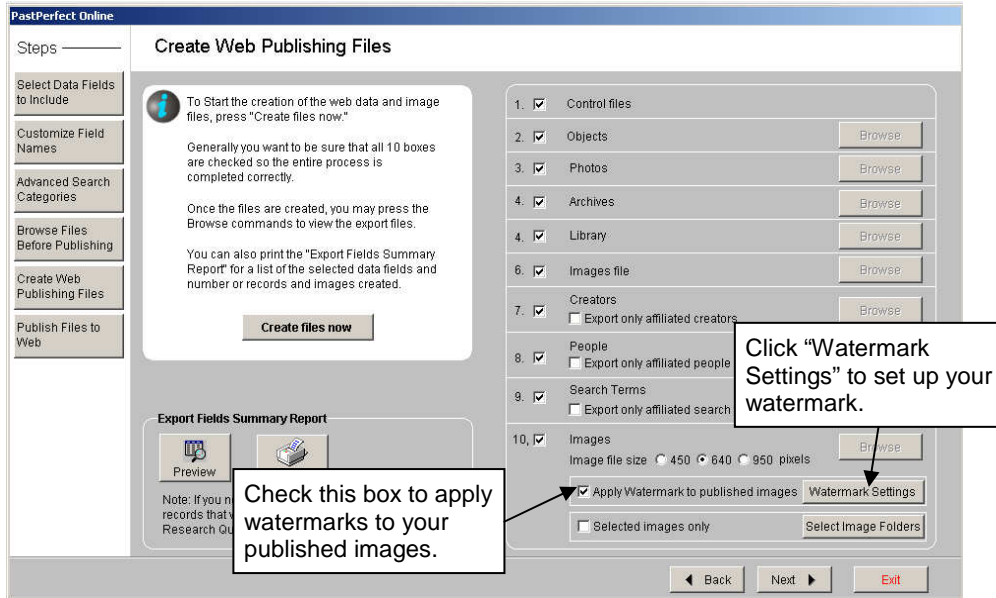
Figure 7: Browse files before publishing



WATERMARKING IMAGES (on Create Web Publishing Files Screen)

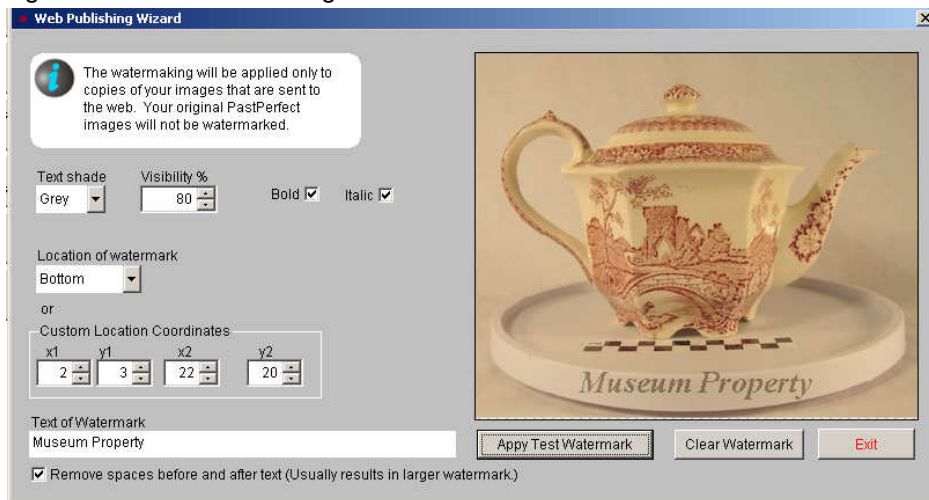
The next wizard screen allows you to set up and apply watermarks to your published images. When images are selected for publication, a large image and a small thumbnail image are created for each image file. Watermarks can be applied to all large images.

Figure 8: Set up Watermark on Create Web Publishing Files screen



If you wish to have watermarks, be sure to put a check next to “Apply Watermark to published images.” You can then click the “Watermark Settings” button to see Figure 9, which shows the watermark options (text of the watermark, shade, location, etc). The watermark will be the same for all images.

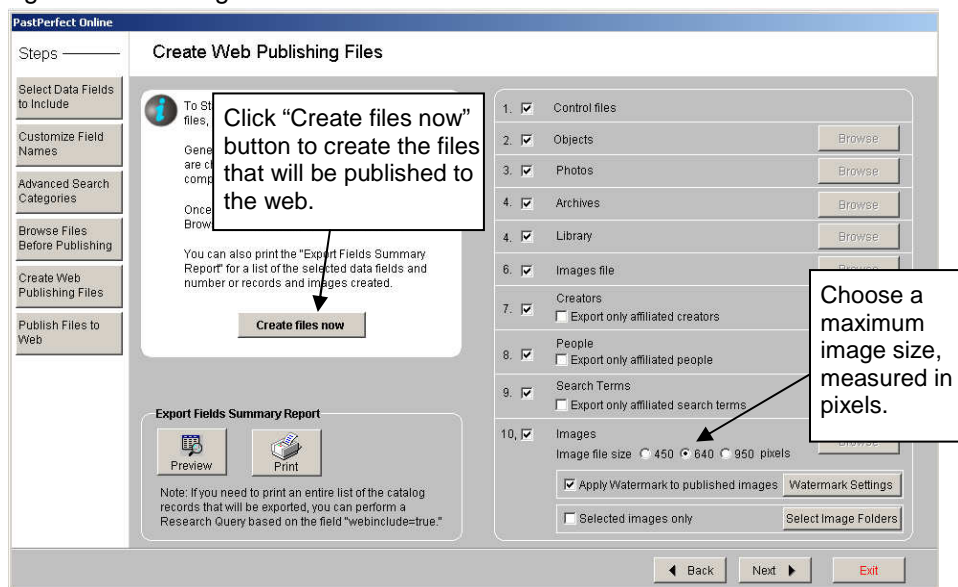
Figure 9: Watermark Settings Screen



CREATE WEB PUBLISH FILES

Once you have made all of your selections, you are ready to create the data and image files that you need to upload to the web server. The first time that you perform this operation, be sure all file type boxes are checked. Later, if you have just made a small change, you could create only selected files. This can save time, particularly if you don't need to recreate the image files.

Figure 10: Creating Web Publish Files



Click the "Create files now" button to start this process. This process could take a while depending on how much data (the number of fields and the number of records) you've selected for publishing, the number of images you're creating, whether or not watermarking is set up, and the speed of your computer, among other factors.

PUBLISH FILES TO THE WEB

The final step of the wizard is to upload your files to the web server. This operation may take a while, particularly if you have a large number of records and images. You will generally want to check all three boxes: Control Files, Data Files, and Images.

Before starting the upload, you will need to enter login information in the fields for: Host Name, User ID, Password, Server Data Folder, and Server Images folder. To determine the correct entries, please consult the PPO Welcome Letter you received when you purchased PastPerfect-Online or contact PastPerfect Support.

Figure 11: Publish Files to the Web

The screenshot shows the 'Web Publishing Wizard' interface. On the left is a sidebar with the following 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 window is titled 'Publish Files to Web'. It contains an information icon and text: 'Once all Web Publishing Files are created, upload them to the Web server using FTP (File Transfer Protocol). Enter the Server Access Information below, select file types to upload, and click Upload to Website Now to start the transfer.' An 'Upload to Website Now' button is visible. Below this is the 'Server Access Information' section with the following fields: Host Name (server5.pastperfect-online.com), User ID (pastperfect), Password (*****), Server Data Folder (20001src), Server Images Folder (20001images), and Local Folder (C:\PPSEVAL\WebExport\). The 'Select Files to Upload' section has checkboxes for 'Control Files', 'Data Files', and 'Images', all of which are checked. There is also an unchecked checkbox for 'Upload Only Images in Selected Folders' and a 'Select Image Folders' button. At the bottom, there is a 'File Transfer Progress' section with 'Status:' and 'File:' labels and an empty text box. Navigation buttons for 'Back', 'Next', and 'Exit' are located at the bottom right.

To start the process, click the “Upload to Website Now” button. This will open an FTP (File Transfer Protocol) connection to the web server and transfer the files. The File Transfer Progress section of the screen will display the name of each file as it is uploaded.

NOTE Because of the wide variety of computer hardware and network connections, there is a possibility that this FTP upload function will not work for you. If you experience problems, please contact PastPerfect Support, and they will assist you with alternative FTP options.

ACTIVATE YOUR WEB SITE

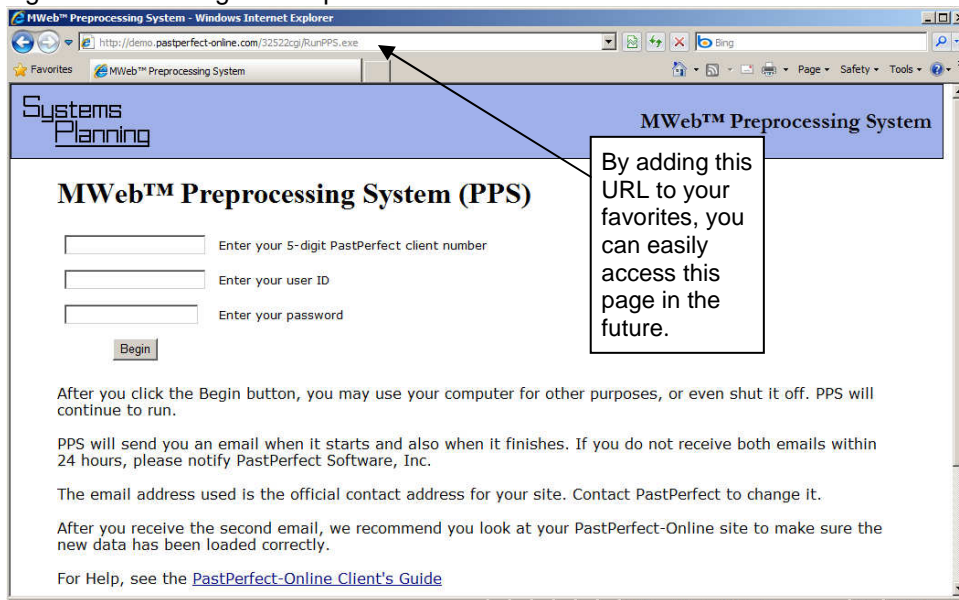
Once you have uploaded your data, the next step is to run the preprocessor from your Internet browser window. In the address line, enter this address with your appropriate information filled in:

[http://**userID**.pastperfect-online.com/**clientnumber**cgi/Runpps.exe](http://userID.pastperfect-online.com/clientnumbercgi/Runpps.exe)

You can find the information that replaces the “**userID**” and “**clientnumber**” portions of the address by looking at the PPO Welcome Letter with your login information, which was included in your PastPerfect-Online User's Guide. Our test site example of this path would be <http://demo.pastperfect-online.com/32522cgi/RunPPS.exe> and it should look like Figure 12.

Enter your “CLIENT NUMBER” “IMS USER ID” and “IMS PASSWORD” in the fields provided, then click the “Begin” button.

Figure 12: Running the Preprocessor



When your site is finished updating, you should receive an e-mail saying the process is finished. Please allow 24 to 72 hours for the updated records to display on your site. If you do not see these new records after 72 hours, please contact the Support Office at 1-800-562-6080 or pposupport@museumsoftware.com.

USING YOUR SITE

Once you have uploaded your data and activated your site, you should be able to navigate to your "SEARCH SCREEN LOCATION" listed on your PPO Welcome Letter.

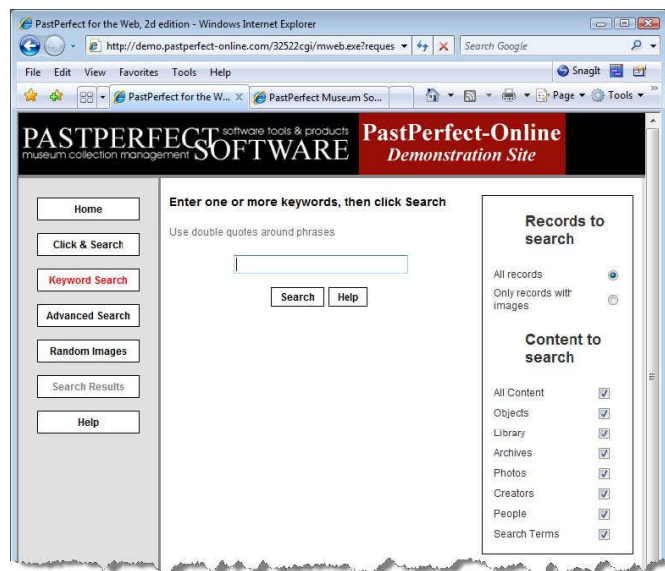
PastPerfect-Online has several different options for searching. The Keyword Search and the Advanced Search are standard on all PastPerfect-Online sites. The Click & Search and the Random Images are optional search features that you can disable if you would like.

KEYWORD SEARCH

The Keyword Search, shown in Figure 13, is common to most websites. It allows the visitor to type in a word or phrase and then search your entire PastPerfect-Online site. Data in any fields mapped to an Advanced Search Category will be included in the Keyword Search.

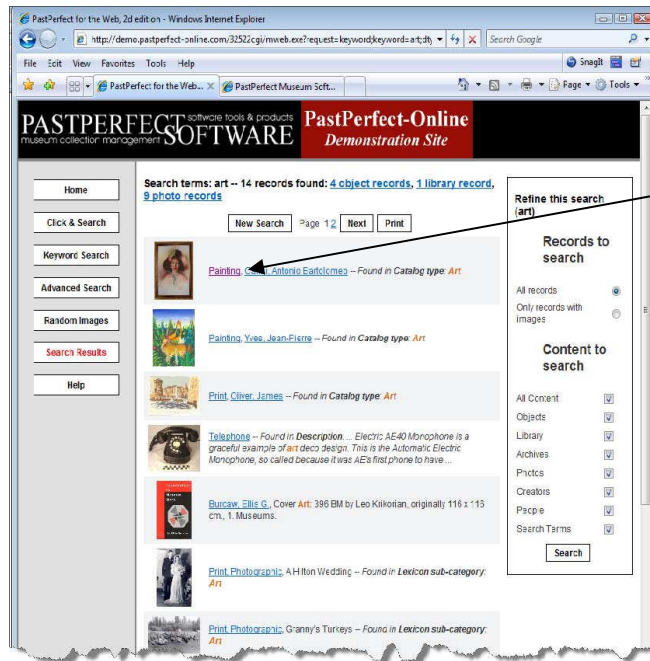
Searches are not case-sensitive. Phrases should be enclosed within double quotation marks. The user can narrow this search to include only records with images. They may also narrow the search to include only one type of record, such as Objects, Photos, Library, etc. Visitors can click the "Help" button on the screen for more information about how to search.

Figure 13
Keyword
Search
Page



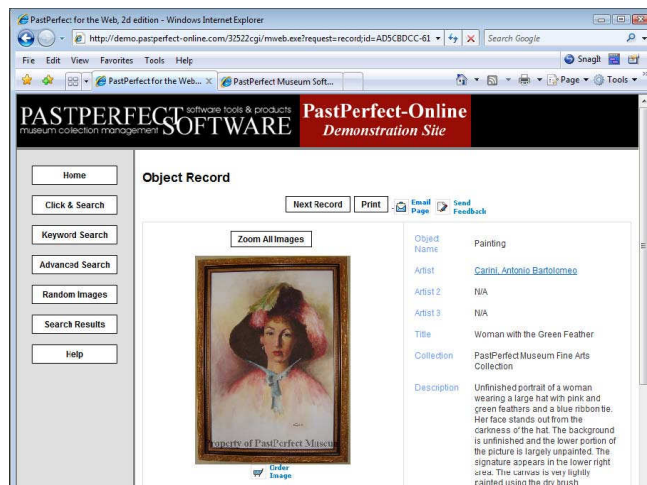
After a search is performed, the results are displayed on the Search Results page. The top of the Search Results page (Figure 14) provides a summary of the search and the records that were found. Below the summary, each record is listed with a thumbnail image.

Figure 14
Search
Results
Page



The search string is identified or highlighted in the results. Visitors may click the thumbnail to view a larger image or click the hyperlinked catalog number or object name to view the full record (as seen in Figure 15).

Figure 15
Full
Record
Page



ADVANCED SEARCH

The other search option is Advanced Search. This option allows visitors to specify more details about the search they wish to perform using the advanced search categories that you defined in the Web Publishing Wizard. For example, an Advanced Search can differentiate between “China” in a title and “China” as a material. The former would look for appearances in the fields you mapped to the Title category. The latter would look to fields mapped to Material.

On the Advanced Search page, each search category has a box where you can enter search terms. You may enter either words or phrases. Phrases should be enclosed within double quotation marks. Searches are not case-sensitive.

Figure 16
Advanced
Search
Page

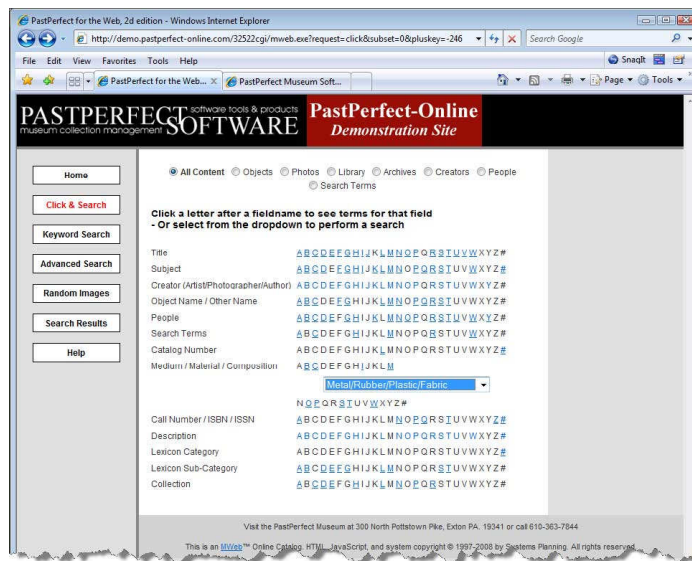
The screenshot shows the Advanced Search interface. On the left, a navigation menu includes buttons for Home, Click & Search, Keyword Search, **Advanced Search**, Random Images, Search Results, and Help. The main search area has a heading: "Enter search terms for one or more search categories. Search results will contain ALL terms entered." Below this is a note: "Use double quotes around phrases". A list of search categories is provided, each with an input field and a radio button for selection. The "Title" category is selected, and the word "china" is entered in its field. Other categories include Subject, Creator (Artst/Photographer/Author), Object Name / Other Name, People, Search Terms, Catalog Number, Medium / Material / Composition, Call Number / ISBN / ISSN, Description, Lexicon Category, Lexicon Sub-Category, and Collection. To the right of the input fields is a "Sort by" dropdown menu currently set to "All records". At the bottom right, there is a "Sort order:" section with radio buttons for "up" and "dn". On the far right, there are two sections: "Records to search" with radio buttons for "All records" (selected) and "Only records with images"; and "Content to search" with a list of checkboxes for "All Content", "Objects", "Library", "Archives", "Photos", "Creators", "People", and "Search Terms", all of which are checked.

Visitors can click the “Help” button on the screen for more information about how to search using Advanced Search.

CLICK & SEARCH

Click & Search is a quick way to search without having to know what terms are in the database. All terms are presented for you in a clickable manner. On the Click & Search screen, you will see a list of Search Categories, each of which has a clickable alphabet next to it. Click any hyperlinked letter to see terms that begin with that letter. After you click a letter, you may see a list of ranges. Click one of these ranges to continue the search.

Figure 17
Click &
Search
Page

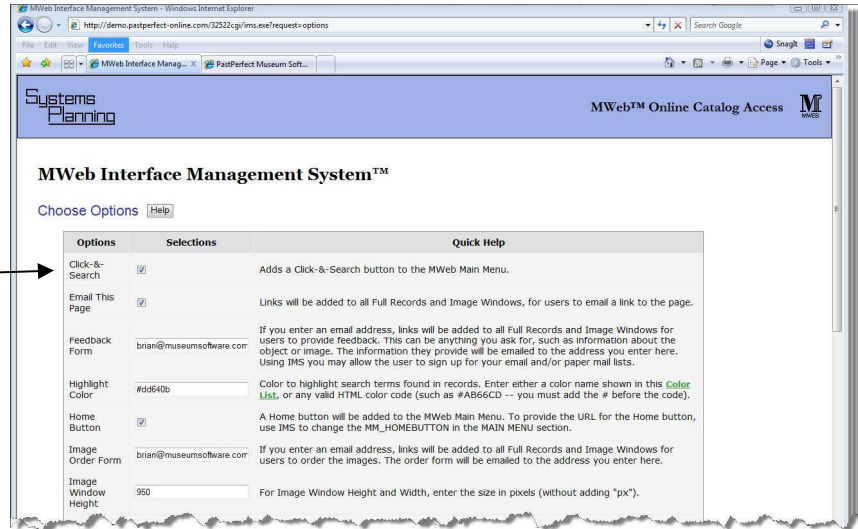


Finally, you will see a drop-down box showing selected records. Click the arrow to the right of this drop-down box and scroll through the terms. When you click on a term, the search is performed for you. If you click on "Metal/Rubber/Plastic/Fabric" it will bring up all of the items that meet the criteria.

Click & Search is an optional search feature. You can remove this search type from your site by going to your IMS site (see the Design Guide, p. 4) and deselecting it under the "Change Options" section (Figure 18 below). Once it's unchecked, click the "Accept New Options" button at the bottom and then the "Click & Search" button will be removed from your site.

Figure 18
Click & Search
Option on IMS
Change
Options Screen

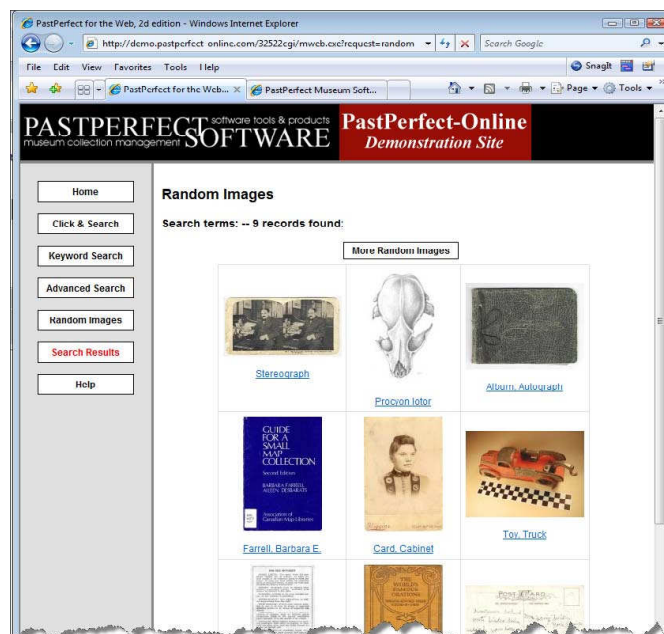
Uncheck
the box for
Click &
Search to
remove
that
feature
from your
website.



RANDOM IMAGES

The Random Images search option allows for multiple random entry points to your collection. Visitors will see a grid filled with images randomly selected from your online records. If they want more information, they can click on the image to view the large image or click on the hyperlinked data to view the full record (Figure 19).

Figure 19
Random
Images
Search



Random Images is an optional search feature. Institutions that decide not to upload images to their PastPerfect-Online site may find that this option is not necessary. You can remove it by going to your IMS site (see the Design Guide, p. 4) and selecting "Change Options." Toward the bottom of the list, you will need to deselect all of the Content Types under the Random Images section (Figure 20). Once they are all deselected, click the "Accept New Options" button and then the "Random Images" button should be removed from your site.

Figure 20
Random Images
Options on IMS
Change Options
Screen

Uncheck all of the content types for Random Images to remove the "Random Images" button from your website.

Width		MWeb image windows, refresh the MWeb display, then click a thumbnail.
Random Images	<input checked="" type="checkbox"/> Objects <input checked="" type="checkbox"/> Photos <input checked="" type="checkbox"/> Library <input checked="" type="checkbox"/> Archives <input type="checkbox"/> Images <input type="checkbox"/> Creators <input type="checkbox"/> People <input type="checkbox"/> Search Terms	<p>Checking one or more Content Types will add a Random Images button to the MWeb Main Menu. Images shown will be from the selected Content Types.</p>
Statistics	<input type="text"/>	If you enter an email address, a monthly statistics report will be prepared and you will be notified by email when it is ready.
<input type="button" value="Accept New Options"/> <input type="button" value="Cancel"/>		

ADDING A PAGEBANNER IMAGE

To customize the look of your website, you will want to add your own pagebanner image to the top of each page. The image should be a JPG file and we suggest it be no larger than 800 X 150 pixels. Specific instructions for uploading are available in the PastPerfect-Online Design Guide also located in this binder.

LINKING TO YOUR EXISTING WEBSITE

If you have an existing website, you might want to link it to your PastPerfect-Online Search site. To do this, you will need to add a button or hyperlink to your existing site that references your PastPerfect-Online URL. If you're using the splash page, you can link to the Splash Page Location listed in your PPO Welcome Letter. You can also link directly to the Search Page Location.