

COMMON CUSTOMIZATIONS

As always, if you have questions about any of these features, please contact us by e-mail at pposupport@museumsoftware.com or by phone at 1-800-562-6080.

EDIT FOOTER TEXT

Included with your PastPerfect-Online site is a footer area with text in it that, by default, says "Put your footer here." You can customize this text to say almost anything--your museum's contact information, visitation hours, copyright rules, tips for searching, etc. To change the footer text, please follow these steps:

1. Open your Internet browser and navigate to your "IMS SITE ADDRESS" as listed in your PPO Welcome Letter
2. Type in your "IMS USER ID"
3. Type in your "IMS PASSWORD"
4. Type in your "IMS PROJECT CODE"
5. Click the "Go" button
6. Click the "Change Messages" link
7. Click the "ALL PAGES" link
8. Click the "DP_FOOTER" link
9. Enter the text you want to appear in the "Text" field of the "Change DP_FOOTER" page
10. Click the "Save" button
11. Open your Internet browser window and navigate to your PastPerfect-Online site

You should see your customized text appear in the footer area at the bottom of your site.

CREATE A CLICKABLE PAGEBANNER

One popular option is to hyperlink your PastPerfect-Online pagebanner/logo to your existing website. To do this, follow the steps below:

1. Open your Internet browser and navigate to your "IMS SITE ADDRESS" as listed in your PPO Welcome Letter
2. Type in your "IMS USER ID"
3. Type in your "IMS PASSWORD"
4. Type in your "IMS PROJECT CODE"
5. Click the "Go" button
6. Click the "Change Messages" link
7. Click the "ALL PAGES" link
8. Click the "AP_PAGEBANNER" link
9. Enter the text below to replace what's in the "Text" field of the "Change AP_PAGEBANNER" page. Be sure to change the highlighted areas to fit your website.

```
<a href="http://www.YourWebsiteAddress.org"> <img  
src='/GRAPHICSLOCATION/pagebanner.jpg' name='Your Institution'  
alt='Your Institution' BORDER=0></a>
```
10. Click the "Save" button
11. Open your Internet browser window and navigate to your PastPerfect-Online site

Now, if you click the pagebanner image at the top of your search screen, it should return you to your main website.

ENABLE SEARCH ENGINE RECOGNITION FOR YOUR PPO SITE

With the PastPerfect-Online 2008 Upgrade, you can now choose to allow access to your PastPerfect-Online database through Google's index, one of the most widely used Internet search indexes in the world. Indexing is the process of scanning information on each webpage of your PastPerfect-Online site and creating a list that can then be quickly referenced when an Internet user performs a Google search.

With millions of websites being added to Google's indexes each week, please allow two to six weeks for your catalog records to show on the list of search results from Google. Going forward, Google will periodically re-index your site, removing bad links and adding new links; however, there is no way to force immediate indexing of your site.

Because of these potential delays, please be sure your site meets your own professional expectations before submitting the site to Google. Unlike PastPerfect-Online, changes made to your records in the Google index may take weeks or months to filter through to the search engine search results pages, due to the number of websites that these search engines index. Please take care to check for fields that you do not want included, spelling issues, and major mistakes made during data entry.

When your site is ready, send an e-mail to pposupport@museumsoftware.com or call 1-800-562-6080 and request that your site be submitted to Google for indexing.

ENABLE INTERACTIVE BUTTONS (Image Request Form, Feedback Form, Email Page)

PastPerfect-Online has optional features that help users interact with your site.

Image Request Form – This form allows Internet visitors to request a copy of a specific image from your institution. Using a simple three-step procedure, the Internet user fills out the form, clicks submit, and that form gets sent to your e-mail address. You can then contact that user with the details of how your institution handles the ordering of images.

Feedback Form – This form can be used to compile feedback from your Internet visitors. By enabling this button, Internet users can send an email directly to you, specifying a particular record. There are a wide variety of ways this form can be used including soliciting feedback, recruiting assistance in identifying photos, and much more.

Email Page Feature – This button allows Internet visitors to e-mail catalog record links to others, further spreading the word about your collection and your institution!

To enable any of these features, please follow these steps:

- 1) Open your Internet browser and navigate to the “IMS SITE ADDRESS” as listed on your PPO Welcome Letter
- 2) Log in with your “IMS USER ID” and “IMS PASSWORD”
- 3) Click the “Change Options” link
- 4) Scroll down the screen and make your selections for which button(s) you want to include:
 - For the Image Request Form, add your e-mail address to the field labeled “Image Order Form”
 - For the Feedback Form, add your e-mail address to the field labeled “Feedback Form”
 - For the Email Page option, place a check in the box labeled “E-mail This Page”
- 5) Click the “Accept New Options” button

When you go to your PastPerfect-Online site and view a full record, buttons for the options you selected should display on the catalog record. To customize any of these forms, please see the next few pages.

CUSTOMIZE YOUR FEEDBACK FORM

- 1) Open an Internet browser window to display one of your records from your PastPerfect-Online site
- 2) Click the "Send Feedback" button to view the Feedback Form
- 3) Open a second Internet browser window or a second tab and type in the "IMS SITE ADDRESS" from your PPO Welcome Letter
- 4) Log in with your "IMS USER ID" and "IMS PASSWORD"
- 5) Click the "Change Messages" link
- 6) Click the "Add New Message to Your Site" button
- 7) For the "Name" field, choose the "Message name" from Table 1 that you want to change and type that "Message name" into the "Name" field on the screen. Then type the text you wish to display in the "Text" field. For example, if you want to change the title of the form page from "Feedback Form" to "Comment Corner," you would type FB_TITLE in the "Name" field and "Comment Corner" in the "Text" field. If you want to write a note to yourself, feel free to enter that in the "Notes" field. Once you are finished, click the "Save" button.
- 8) Next, go back to the Internet browser window that has your Feedback Form showing (from Step 2) then click the "Refresh" button at the top of your Internet browser window. You should see "Feedback Form" change to "Comment Corner."
- 9) You can repeat steps 6-8 to change other messages including "Page heading" and "Instructions"
- 10) When you are finished, please close the IMS Internet browser window

Table 1: Messages for Feedback Form

Message name	Purpose	Default Text (Suggested Words)
FB_TITLE	Page title	Feedback Form
FB_HEADING	Page heading	Please help us by providing feedback or information
FB_INSTRUCTION	Instructions to the user	Click Send to e-mail this information to the museum. Or call us at the number below. Thank you!
FB_INFO	Instructions for the box where the user enters information	Add your feedback here
FB_WANTSEMAIL	If this message is used, the form contains a checkbox where the user can request to be on the e-mail mailing list.	No default. (Add me to the e-mail newsletter. (Please make sure your email address above is correct.))
FB_WANTSMAIL	If this message is used, the form contains a checkbox where the user can request to be on the paper mailing list and a box to enter their mailing address.	No default. (Add me to the mailing list. (Please enter your address below.))

CUSTOMIZE YOUR IMAGE ORDER FORM

- 1) Open an Internet browser window to display one of your records from your PastPerfect-Online site
- 2) Click the "Order Image" button so you are viewing the Image Order Form
- 3) Open a second Internet browser window or a second tab and type in the "IMS SITE ADDRESS" from your PPO Welcome Letter
- 4) Log in with your "IMS USER ID" and "IMS PASSWORD"
- 5) Click the "Change Messages" link
- 6) Click the "Add New Message to Your Site" button
- 7) For the "Name" field, choose the "Message name" in Table 2 that you want to change and type that "Message name" into the "Name" field. Then type the text you wish to display in the "Text" field. For example, if you want to change the title of the form from "Image Order" to "Image Request," you would enter IO_TITLE in the "Name" field and "Image Request" in the "Text" field. If you want to write a note to yourself, feel free to enter that in the "Notes" field. Once you are finished, click the "Save" button.
- 8) Next, go back to the Internet browser window that has your Image Order Form showing (from Step 2), then click the "Refresh" button at the top of your Internet browser window. You should see "Image Order" change to "Image Request."
- 9) You can repeat steps 6-8 to change other messages including "Page heading" and "Instructions"
- 10) When you are finished, please close the IMS Internet browser window

Table 2: Messages for Image Order Form

Message name	Purpose	Default text
IO_TITLE	Page title	Image Order
IO_HEADING	Page heading	Fill in this form to order reproduction rights for IMAGEINFO (IMAGEINFO will be replaced by the path and file name of the image)
IO_INSTRUCTION	Instructions to the user	For permission to reproduce this image, please fill in this form and click Send, which will e-mail it to the museum. The museum will contact you regarding fees and delivery schedule. Our contact information is below in case of problems or questions. (If you do not have Outlook Express installed, print this page and mail it to the museum.)
IO_INFO	Instructions for the box where the user enters the purpose of the request	Purpose: Provide the following information about where this image will be used: Description, title of publication, author, publisher, date of publication, number of copies produced, distribution, languages, and location of image (inside or cover).

CUSTOMIZE YOUR EMAIL PAGE FORM

- 1) Open an Internet browser window to display one of your records from your PastPerfect-Online site
- 2) Click the "Email Page" button to view the Email This Page form
- 3) Open a second Internet browser window or a second tab and type in the "IMS SITE ADDRESS" from your PPO Welcome Letter
- 4) Log in with your "IMS USER ID" and "IMS PASSWORD"
- 5) Click the "Change Messages" link
- 6) Click the "Add New Message to Your Site" button
- 7) For the "Name" field, choose the "Message name" from Table 3 that you want to change and type that "Message name" into the "Name" field on the screen. Then type the text you wish to display in the "Text" field. For example, if you want to change the title of the form from "Email This Page" to "Send this to a friend," you would type EF_TITLE in the "Name" field and "Send this to a friend" in the "Text" field. If you want to write a note to yourself, feel free to enter that in the "Notes" field. Once you are finished, click the "Save" button.
- 8) Next, go back to the Internet browser window that has your "Email This Page" showing (from Step 2) then click the "Refresh" button at the top of your Internet browser window. You should see "Email This Page" change to "Send this to a friend."
- 9) You can repeat steps 6-8 to change the other available message: "Instructions"
- 10) When you are finished, please close the IMS Internet browser window

Table 3: Messages for Email Page Form

Message name	Purpose	Default text	Notes
EF_TITLE	Page title	Email This Page	If this message does not exist, no page title will be shown
EF_HEADING	Instructions	Use this form to send a link to a friend	

If you would like to change the name of your institution that appears in the default email text, please contact PPO Support at 1-800-562-6080 or pposupport@museumsoftware.com.

MWEB™ SEARCH REPORT

The MWeb™ Search Report gives you the option to receive monthly reports regarding the searches made on your PastPerfect-Online site. This report includes the number of visitors, the number of searches, which searches are most popular, and more!

RUNNING AND ACCESSING THE REPORT

The MWeb™ Search Report is automatically set up when you purchase PastPerfect-Online if you provided an email address, and it is scheduled to run once a month. After it has run, you will receive an email with a link to your most recent report. You can also go directly to the following address, filling in your own “username” and “clientnumber” from the PPO Welcome Letter, to see the current report (whatever it reported the last time it was run):

<http://username.pastperfect-online.com/clientnumber/Reporter.htm>

You can also run the report yourself if you need it produced on a different date. Follow these instructions below.

1. Go to this address, filling in your own “username” and “clientnumber”:
<http://username.pastperfect-online.com/clientnumbercgi/RunReporter.exe>
2. Enter your client number
3. Choose the date range to be included on the report, either Current year or All years
4. Click the “Begin” button

Once you’ve clicked “Begin,” wait a couple of minutes and then click the “Click here” link. You may also receive an email saying the report is ready and can access it by clicking the link in the email.

VIEWING YOUR REPORT

Report Date:

When viewing the report, the date at the top is the date the report was last run for your site. If you need more recent data, you can run the report yourself (using the instructions above), which will include the most recent search statistics.

1. General

- In the "General" section, you'll see four different sets of graphs: Searches, Full Records (users), Full Records (Google), and User IDs.
 - The Searches graphs show the number of searches that have happened on your site.
 - The Full Records (users) graphs show the number of full records users have accessed on your site.
 - The Full Records (Google) graphs indicate the number of full records Google has accessed (once you request to have your site submitted for Google indexing).
 - The User IDs graphs show the number of "user ids" or visitors to your site who performed those searches.
- In the charts, the first number ("10") refers to the year (2010), and the second number listed is the total number of searches or visitors in that year.
- To see a month-by-month break down, you can use the bar graphs. Each color theme represents one year, with the different months in lighter and darker colors. For instance, the blue graphs show the numbers for 2009 and the red graphs show the numbers for 2010. If you move your mouse arrow over the different shaded bars on either graph, you will be able to view the numbers (of searches, of visitors, etc.) for that particular month.

2. Searches by Type

In the "Searches by Type" section, you'll see graphs for each of the different types of searches that are available for your PastPerfect-Online site. Again, the totals for the year are listed in the charts, and the bar graphs show the month-by-month comparison. Similar to section 1, you can move your mouse arrow over the different shaded bars on these bar graphs and view the number of that type of search performed on your site for that month.

3. Top Ten Searches for the Year

The "Top Ten Searches for the Year" gives you the ten searches that were most popular for each year your site has been in existence. The number in the "Instances" column indicates how many times these searches were performed by Internet users.

4. Searches with More than 10,000 Hits

If any users search for a broad term that results in more than 10,000 hits or results, the type of search and the term searched will be listed along with the number of hits. MWeb prevents the user from seeing the results of such queries, as they are probably useless and take too much server time.

5. Searches with More than 5,000 Hits

If any users search for a broad term that results in more than 5,000 hits or results, the type of search and the term searched will be listed along with the number of hits. MWeb will allow the user to see the search results, but indicates that users are searching for general terms instead of specific ones.

6. Searches with No Hits Used 15 or More Times

This section lists any common searches (items that have been searched for 15 times or more) that resulted in no hits. These indicate that the terms users are seeking are not in your online database.

7. Top Ten Records of the Year

The top ten full records for each year will appear under this section. The Request column tells you the catalog and the first field you have displayed or the type of search and what was searched. More than 10 records may be listed to show ties.

8. Errors Encountered

Any errors encountered will be recorded here.

9. Notes

The Notes section lists notes about the search report and how the reporting works. You can also download tab-delimited statistics for further analysis.

CHANGE EMAIL ADDRESS OR DEACTIVATE REPORT

If you need to change who is receiving the MWeb™ Search Report or if you would like to disable it, please follow these instructions.

1. Open an Internet browser window and navigate to your "IMS SITE ADDRESS" as listed in your PPO Welcome Letter
2. Log in with your "IMS USER ID" and "IMS PASSWORD"
3. Click the "Change Options" link
4. Scroll down to the bottom of this screen and change the email address listed in the "Statistics" field (or delete the email address from the field to deactivate the reporter)
5. Click the "Accept New Options" button to save your changes

PPO SPLASH PAGE

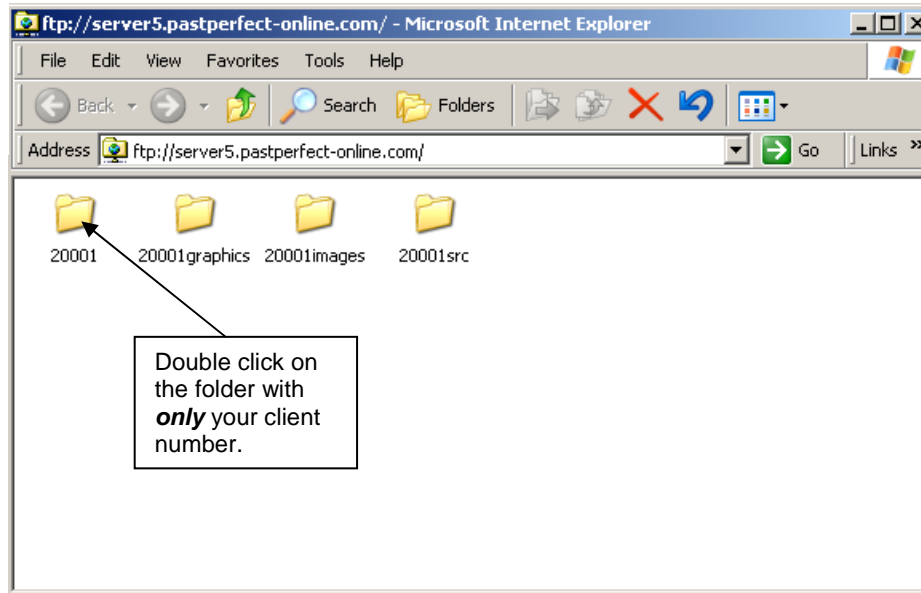
Each PastPerfect-Online site also includes a free splash page, hosted on our server as a front end to your PastPerfect-Online search pages. This optional page can be customized to provide additional information to your visitors. If you don't have an existing website, you can use this splash screen to provide more information about your organization. Other organizations find it helpful to inform their web visitors about how to search using their site. Giving tips may help improve the visitor experience and help them attain higher quality results.

The splash page must be created outside the PastPerfect program as one HTML page. You may edit the splash page yourself (we have provided some basic instructions here) or you can contact our Support Office for information about purchasing a customized template that mimics the look and feel of your main website.

ACCESSING YOUR SPLASH PAGE SCREEN'S HTML PAGE

1. Right click on the Windows "Start" button, then click on "Explore."
2. In the address bar, type your "FTP SITE" as listed on your PPO Welcome Letter (<ftp://server#.pastperfect-online.com> - replacing "#" with your one-digit server number). Then, press "Enter."
3. Type in your "USER ID" and "PASSWORD" as listed in your PPO Welcome Letter. Then, click the "Log On" button.
4. A window should display several folders, see Figure 1. Double click to open the 00000 folder (substitute your client number for 00000).
5. Inside the 00000 folder, there will be a file called "index.htm." You can copy the file (Ctrl+C) and paste it on your desktop (Ctrl+V).

Figure 1
Folders
on the
FTP site



MODIFYING YOUR SPLASH SCREEN'S HTML PAGE

1. To open the file on your desktop, right click on it and then choose "Open With" and select "Notepad." This will open the file in Notepad and allow for editing of the HTML.
2. Please see the following pages for some common HTML codes. You may also use an HTML editor to create the coding which can then be copied and pasted into this file – several free ones are available online.
3. Once your changes have been made, you should save the file by going to "File" and then choosing "Save."
4. After saving, please close the file.
5. To see what your changes look like in a Web browser, please double click on the "index.htm" file you have on your desktop. This should open the page in a Web browser so you can see your changes. If you see the HTML codes when viewing the file in a Web browser, you have something wrong in your HTML code.
6. If needed, you can go back to edit the "index.htm" file in Notepad.
7. Once you have finished making your changes to the HTML page and you can see your desired result in a Web browser, you need to repost your splash page to the FTP site so that it will be visible to online viewers.

REPOSTING YOUR UPDATED SPLASH PAGE

1. Copy the "index.htm" file on your desktop (Ctrl+C).
2. Right click on the Windows "Start" button, then click on "Explore."
3. In the address bar, type your "FTP SITE" as listed on your PPO Welcome Letter (<ftp://server#.pastperfect-online.com> - replacing "#" with your one-digit server number). Then, press "Enter."
4. Type in your "USER ID" and "PASSWORD" as listed in your PPO Welcome Letter. Then, click the "Log On" button.
5. The window should display several folders. Double click to open the 00000 folder (substitute your client number for 00000).
6. Inside the 00000 folder, right click on the "index.htm" file that is already there. Choose "Rename" and change the name to "oldindex.htm"
7. Click anywhere in the white area of your screen to save your changes.
8. Right click anywhere in the white area of your screen and choose "Paste." You should see a file titled "index.htm" appear.
9. You can now exit from the FTP site window and go to your "SPLASH SCREEN LOCATION" as listed on your PPO Welcome Letter to see the changes.

If your institution has its own website and you don't want to use the splash page we provide, you may create a link directly to your "SEARCH SCREEN LOCATION."

HTML BASICS

HTML is Hyper Text Markup Language. To create a more advanced splash page, you can add HTML coding to your "index.htm" file. This will help you alter the appearance of text, change the background color, and integrate logos on your splash page. For a fully customized splash page that mimics the look and feel of your main website, please contact our Support Office for information about custom templates.

HTML uses what are called "tags" to turn features on and off. These tags are noted by inserting the appropriate code between the < > symbols. These 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 codes are not case sensitive; however it is best to be consistent as you add your tags. There is also no priority of color, size, or other 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" or "Return" key on your keyboard. If you would like a line or paragraph break, use the codes further below for each option.

ADDING BANNERS / IMAGES

To add a banner or logo to your splash page, you need to have the banner/logo saved as a JPG image named "pagebanner.jpg". Our recommended size for this image is 800 pixels long by 100 pixels high.

Part I: Putting your image file on the web server.

1. Save the banner or logo of your current site as pagebanner.jpg
2. Copy this pagebanner.jpg file (Ctrl+C)
3. Navigate to your "FTP SITE" as listed in your PPO Welcome Letter (<ftp://server#.pastperfect-online.com> - replacing "#" with your one-digit server number)
4. Type in your "USER ID" and "PASSWORD" as listed in your PPO Welcome Letter. Then, click the "Log On" button.
5. The window should display several folders. Double click to open the 00000 folder (substitute your client number for 00000)
6. Paste the image file into this folder (Ctrl+V)

Part II: Adding the HTML tags to the "index.htm" file for the image

1. In your "index.htm" file, you will need to add the following line:

```

```

I suggest adding it right below your "body bgcolor text color" line.

2. If the image is not appearing correctly, you may need to add width and height attributes. Try this HTML tag instead of the tag listed in Step 1.

```

```

You may need to adjust the width and height numbers to make your banner appear correctly.

Adding additional images

1. You can also do a similar thing for posting other images on your splash page. Copy and paste the image into the 00000 folder.
2. Type the text below into the HTML document where you would like the image to appear, replacing the shaded text with your image name.

```

```

3. If the image is not appearing correctly or if you would like to adjust the size, you may need to add width and height attributes. Try this HTML tag instead, adjusting the width and height pixel dimensions so that the image appears correctly.

```

```

CHANGING BACKGROUND AND TEXT COLORS

For simple colors, you can write them out as text in HTML (for instance, black, white, red, blue, green, yellow, etc.). However, if you want a more specific color, you will need to use the six-character color codes. You can find these HTML color codes online if you are unsure of the code for the color you want.

Here are some examples for background and text colors to be applied to your whole page:

```
<body bgcolor="black" text="white">
```

```
<body bgcolor="0000FF" text="FFFFCC">
```

Here are some examples for one line of text in a different color:

```
<font color="red">Text in red.</font>
```

```
<font color="FFFF00">Text in yellow.</font>
```

CHANGING FONT SIZES

There are several ways to indicate font sizes, but the simplest way is to just use numbers 1-7. Here are the approximate font sizes associated with the numbers.

HTML Coding	Approx. Font Size
Type your text here.	7.5 point
Type your text here.	10 point
Type your text here.	12 point
Type your text here.	13.5 point
Type your text here.	18 point
Type your text here.	24 point
Type your text here.	36 point

ITALICS / BOLD / UNDERLINE

Formatting	HTML Tags	Example of Display
Italics	<i>Italics</i>	<i>Italics</i>
Bold	Bold	Bold
Underline	<u>Underline</u>	<u>Underline</u>
Combination	<u><i>bold-underline-italics</i></u>	<u><i>bold-underline-italics</i></u>

PARAGRAPH BREAK / LINE BREAK

Break Type	Description	HTML Tags	Example of Display
Paragraph Break	Includes two returns (so there is blank line in between)	Line 1.<p> Line 2.	Line 1. Line 2.
Line Break	Includes a single return	Line 1. Line 2.	Line 1. Line 2.

WEBSITE LINKS / EMAIL LINKS

To add website links or email links, insert the following HTML codes into your "index.htm" file. Replace the shaded text with your website or email address. Replace the bolded text with the words you would like to be the link.

To link to another page on the web:

```
<a href="http://www.museumsoftware.com">PastPerfect's Home Page</a>
```

Resulting Link: [PastPerfect's Home Page](http://www.museumsoftware.com)

To link to an email address:

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

Resulting Link: [Email Me!](mailto:pposupport@museumsoftware.com)