

Welcome to PastPerfect Video Tech Tips. This technical tip will cover setting up security for your PastPerfect users.

The PastPerfect basic program is equipped with the option of password protection, because the ability to keep your PastPerfect data secure is important. Security may be activated to restrict unauthorized users from accessing the entire program, or certain screens and features within PastPerfect. For instance, you may restrict the ability to add, edit, delete and print records as well as the ability to access items like location, appraisal, and legal information.

To setup security within PastPerfect, from the Main Menu, on the lower right side, please select "Setup" and then "Security" from the fly up menu. Security contains 10 re-namable groups. The name of the group for the screen being viewed is in the upper left of the "Password Protection" screen.

- To navigate between the groups you may use the prior and next arrows at the top of the screen, to the right of the group name.
- To restrict access to any of the areas indicated on your security screen for this group, please place a check mark in the box to the left of the item.

Check-boxes in the group headers, like Objects Catalog, will restrict access to that button from the Main Menu. To allow access to a previously restricted area, click once on the checked box to the left of the item. Group 1 is entitled Administrator, and should generally have nothing checked, indicating that there are no restrictions in place.

- To add users to a group, please navigate to the group by using the Prior or Next arrows. For this example we will be adding a user to Group 2.

Once you have located the desired group, you may either assign users to the group immediately or you may first place restrictions on this group by placing check marks in the desired areas.

- We will first restrict access to Campaigns, Lists & Labels, Pledges & Receipts and within Contacts we will restrict: Delete, Pledges, Membership, and Donations.
- Once those items have been checked, please select the button to the right of the Prior and Next arrows, which reads "Add/Display Group Members".
- Next, select the button "Add user" located on the lower left side of the "Users in group" screen.
- Please type the User's name in the Name field on the "Add new user" screen. We will enter it Last name, First name for easy sign-in and reference later.
- Press the Tab key on your keyboard or click in the white space next to Password, to move into the Password field.
- Please type the user's password, which may have a maximum of ten characters and may contain letters and numbers.
- When finished creating the password, select the Add button at the bottom center of the "Add new user" screen.

You will notice that the User's name is added to the screen "Users in group". An unlimited number of users may be assigned to each group.

- When finished adding users to this group, in the lower right corner of this screen, please press Exit to leave the “Users in group” screen.

Please repeat this process for each of the groups that you require.

- When you are ready to activate the security feature, on the lower right side of the “Password Protection Off” screen, select the button “Activate Protection”.

Once the button has been pressed, the “Password Protection Off” screen, should become the “Password Protection On” screen

- Press Exit, on the lower right, to return to the Main Menu.
- To fully activate the security feature, you will need to exit completely out of PastPerfect. The Exit button is located in the lower right corner of the Main Menu.
- Beginning with PastPerfect 4.0D7, once you select Exit, you will receive the Data backup reminder screen.
- In this instance, please press Close in the lower right corner of this screen.
- Next, you will receive a screen which indicates security has been activated and that you will need a password to re-enter the program.
- Please select OK on the lower left of the “Alert” screen, then select “Yes”, to indicate that you wish to quit the program.
- Please re-open the PastPerfect program.
- When you open the program, you will now be prompted to choose your user name and type in your password.
- After typing your password, on the lower central portion of the “PastPerfect Security Check” screen, please select “OK”.

The lower right corner of the Main Menu, below the Reindex button, will now indicate who is currently logged into PastPerfect.

Notice that those areas that were checked on the Security screen are now grey, indicating that they are inaccessible to this user. We see that this includes Campaigns, Pledges and Receipts, Lists and Labels, and within Contacts this user may not delete records or access the restricted, or grayed, areas. If they attempt to access one of these areas they will receive the message “This function is restricted by PastPerfect security”.

- If this message is received, to return to the record, please press “OK”.

An additional benefit of activating security is that when records are added or edited the logon name will also appear in the “Updated by” field.

- When finished viewing your activated restrictions, please select the Exit button from the upper, central portion of the screen, to return to the Main Menu.

If you have any questions regarding how to setup security in PastPerfect, please contact our support office at 1-800-562-6080, toll free or email us at support@museumsoftware.com