

How do I Set up Security?

PastPerfect 4.0

The Security feature in PastPerfect is a great way to keep track of how each of your PastPerfect users is using PastPerfect. Each time a record is saved in PastPerfect, after being added or edited, the program records the date and time the record was saved. With Security activated, it will also record the name of the person logged into PastPerfect on that computer. This allows you to see who is adding or editing records and when they are doing the work. PastPerfect 4.0 users can also see a history of when records were saved in all of the catalogs.

To set up Security, click on the Setup button on the Main Menu, and then click on Security. On the top left corner of the screen, you will see a listing of groups, ranging from Administrator to Volunteer. First, go through each security group and decide which groups should have access to certain features in the program. For example, people who would be under the Membership group may not need to have access to the Objects catalog. If there are sections of PastPerfect that you would like to restrict, all you need to do is place a checkmark next to the options you do not want the group to access.

Once you have the restrictions set up for your groups, you will need to add users to each group. To add people to a group, click on the “Add/Display Group Members” button at the top of the screen, and then click on the Add button. Type in the name of the person who will be logging in as well as a password. Passwords can be up to 10 characters long, but are not required if deemed unnecessary.

Once you have your restrictions and users set up, you can then start using the logins by clicking on the Activate Protection button on the lower right hand corner of the screen. Once security is activated (it will say “Password Protection On” at the upper left hand corner of the screen), exit completely out of PastPerfect, and then open PastPerfect again. You should now see a login screen, where you can click on your name and enter your password to bring up the Main Menu. You will not be able to click on the buttons for the areas from which you are now restricted.

For more information about setting up Security in PastPerfect, you can view pages 48-50 in your PastPerfect 4.0 User's Guide. You can also contact our support office at (800)562-6080 if you have further questions about setting up security.