

COMvantage Solutions

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Version 2.x

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User Guide

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Table of Contents

	Page
Chapter 1 – Introduction	
Introduction	1
The Trial Version and Registering Docs2Web	1
Upgrading Prior Versions of Docs2Manage to use Docs2Web	2
Getting Started	2
Definitions	3
Security and Docs2Web	4
Image and File Support for Docs2Web	5
An Overview of Security Event Logging	6
System Requirements	6
Web Server Support	7
Setting up a Web Server	7
Troubleshooting	14
Chapter 2 – Configuring Docs2Web	
Configuration Overview & Registration	16
Docs2Web Install Directory	17
Connection Number, Website Name, and Connection Name	17
ADO Connection String	18
Testing the Database Connection	18
Search Drop-down Text	19
Website Settings	19
Website Relative Path	19
Create Template Directories Button	19
Docs2Web Application Location	20
Security Settings	20
Advanced Settings	21
Saving Settings	21
Undoing Changes	21
Exiting the Configuration Program	21
Chapter 3 – Managing a Docs2Web Website	
Website Map	22
HTML Templates	24
Docs2Web Interface for Requesting Images or Files	30
User Experience	31
Chapter 4 – Notes	
Additional Notes	33
Credits	33

Chapter 1 – Introduction

Introduction

Thank you for choosing **Docs2Web**, the web interface to your Docs2Manage database. Docs2Web provides the ability to search, view, print, and download documents using a standard browser while maintaining the security options set in Docs2Manage. Docs2Web is a web server application that can resize, convert, create PDFs dynamically, and provide access to documents to multiple users in any type of browser. The result- Docs2Web coupled with Docs2Manage is a cost-effective solution that can securely provide access to documents via the Internet or Intranet without the need for a client installation.

Please note that Docs2Web is not free software. You can try out the limited version for free, but if you wish to use the full version, you will need to purchase and register your licensed copy. Please visit [Docs2Manage website](#) for more information and pricing options.

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- 4) If you want to distribute Docs2Web on a CD-ROM or other compilation, please contact service@docs2manage.com before doing so for approval.
- 5) You may try out the unregistered version of Docs2Web without any charge for 60 days from the date the software was installed. Also, you may not use a Docs2Manage database that contains more than 1,000 page records in total. To remove these restrictions, you must purchase a license for the web server that will host the Docs2Web application. **Please read the [The Trial Version and Registering Docs2Web](#) section how registration works and the [Configuration Overview & Registration](#) to learn how to register Docs2Web.**

The Trial Version and Registering Docs2Web

The trial is a fully functional program but does have limitations. The trial version of Docs2Web only allows 60 days of usage and a 1,000 page limit per database. It also only allows the use of the first two connection or websites. Each website can only connect to one database at one time, but can be reconfigured to use a different database at a later date. The trial version of Docs2Web only allows 5 concurrent users within a 5 minute period.

Docs2Web Available in ISAPI and CGI Formats

Docs2Web is distributed as an [ISAPI](#) web application, but can also be used in [CGI](#) application format. In general, CGI applications run many instances to serve the many incoming web request and because of this may use more system memory and perform slower than ISAPI applications. It is recommended to use ISAPI over CGI format if your web server can run ISAPI applications. Please contact [Docs2Manage Support](#) if you require Docs2Web in CGI format instead of ISAPI format.

Registering

When you register Docs2Web, the time and document restrictions are lifted. However, one license is only good for one website or connection. Please be sure to indicate if you need

multiple websites using Docs2Web if you plan to use Docs2Web to access multiple databases. The licenses are sold by number of concurrent users allowed within a 5 minute period.

Updating Docs2Web in the Future

After your initial purchase, you can download and update Docs2Web for the next 6 months from the date of your license. After that, you must purchase a Docs2Web and possibly a Docs2Manage upgrade to continue to be eligible for upgrades and support. Please visit the [Docs2Manage website](#) for more details.

NOTE: If you decide not to purchase an upgrade, you can continue to use the version you already have installed. It will not expire.

Upgrading Prior Versions of Docs2Manage to use Docs2Web

In order for Docs2Web to function, it must use a Docs2Manage database. Docs2Manage is a Windows program that is used to enter documents into this database. If you are currently using Docs2Manage version 1.12 or lower or Document Storage System, you will need to upgrade your database to use Docs2Web.

Please read the instructions on how to upgrade your database in the Docs2Manage User's Guide or Help File.

You must be able to run Docs2Manage 1.13 or higher against the Docs2Manage database you plan to use for Docs2Web in order for Docs2Web to function correctly. Please download the latest version of Docs2Manage and Docs2Web from the [Docs2Manage website](#).

Getting Started (General steps to use Docs2Web)

- 1) Before installing Docs2Web, [download](#) and install Docs2Manage v1.13 or greater on the machine where Docs2Web will be installed. If upgrading from an older version of Docs2Manage or Document Storage System, please read notes about [upgrading prior versions](#).
- 2) Run the Docs2Web install, which includes the install for the Falcon Web Server. If planning to use another type of web server, please read the sections about [Web Server Support](#) and [Setting up a Web Server](#).
- 3) After the web server has installed, continue with the Docs2Web install. When it is finished, the install will attempt to start the Falcon Web Server.
- 4) After the server is started, a dialog will appear to select which database (or website) to view. If you populated the provided blank Docs2Manage database with documents, select the "Docs2Manage Blank Database Web Example". To try a database that already has data, click the "Real Estate Database Web Example". This should open the browser to the selected Docs2Web website.
- 5) Next, using your browser, navigate through all the pages of the website to verify the site is fully functional. This action will also cause the Docs2Web application to create HTML templates in the HTML directory under the [path](#) for that website.
- 6) If desired, [modify the HTML template files](#) to remove any unneeded fields in the search, columns in the search result page, or page list page. These same pages can be customized to create the look, theme, and feel of your Docs2Web website.
- 7) To make the Docs2Web website more public than browsing the Docs2Web website server, modify the web server to use your internal IP Address (for Intranet) or use an External IP Address, which is available to all of the Internet providing that if you have a router or firewall, it is directed to allow traffic to the [Docs2Manage website](#).
- 8) Test the website by browsing all the different pages in the website.
- 9) Promote the website to those who will access it!

Definitions

CGI- Is an acronym for **C**ommon **G**ateway **I**nterface. Very similar to [ISAPI](#) applications, but CGI applications generally run many instances to serve the many incoming web request and because of this may use more system memory and perform slower than the same ISAPI application. It is recommended to use ISAPI over CGI when the web server allows.

Docs2Manage- The windows software also made by COMvantage Solutions that is needed to input documents into the database that Docs2Web uses. Please visit the [Docs2Manage website](#) for more details about the trial or full version of Docs2Manage.

IP Address (TCP/IP Address)- This is a unique number assigned to any device, computer, or web server on the Internet. It is four groups of numbers ranging from 0 to 255 separated by periods like "192.168.1.13". IP Addresses that begin with:

10.0.0.0 - 10.255.255.25

172.16.0.0 - 172.31.255.255

192.168.0.0 - 192.168.255.255

are reserved IP Address ranges reserved for Local Area Networks (LAN or Intranet). **The IP Address 127.0.0.0 is also reserved as the localhost IP address, which is the address to use when testing a website or web application on your own computer only.** All other IP addresses outside these ranges are considered to be used by the Internet. That localhost IP address (127.0.0.1) is the address that Docs2Web is configured to use by default. This means that Docs2Web can only be tested on the computer where it is installed. Docs2Web can be tested on your Intranet or on the Internet by changing the IP address used by the [web server](#) and the Docs2Web [application](#). On a company network, obtain your company IP Address by going to the command prompt and typing "ipconfig" or contact your Network Administrator. To obtain your External IP (Internet) address, open your browser and visit a website like www.whatismyip.com. Please ask your network administrator about setting up your Docs2Web application on the Internet.

ISAPI- Is an acronym for **I**nformation **S**erver **A**pplication **P**rogrammers **I**nterface. This is the web application technology that Microsoft developed to run on Microsoft Web Servers that Docs2Web is built on. The main idea behind this technology is very similar to standard CGI applications except ISAPI web applications are cached by the web server. This increases performance while decreasing the amount of memory needed for the web application, since CGI application may have to load and run several instances of the same web application to fulfill all request. Many of today's windows-based web servers have adapted ISAPI, since this technology is also required to handle ASP pages.

HTML- Is an acronym for **H**yper**T**ext **M**arkup **L**anguage. This is the language which almost all websites use to format the content of there website. The website templates provided or produced by Docs2Web are in standard HTML. This means your Docs2Web can be formatted to have a look that your organization desires. Care must be given to preserve or implement the [tags](#) used by Docs2Web. These tags will be replaced by the web application, so the result of the page is all HTML.

HTTP Path- This describes the location of the non-encrypted website content without any of the web application information or parameters. The format of this is usually "http://" followed by the IP Address or domain name and the port number if something other than 80 is used. The default port used by HTTP is port 80.

HTTPS Path- This describes the location of the encrypted website content without any of the web application information or parameters. The format of this is usually "https://" followed by the IP Address or domain name and the port number if something other than 443 is used. The default port used by HTTPS is port 443. To insure that documents on your Docs2Web website are not captured by a third party, it is suggested to purchase an SSL certificate from a company like

[Verisign](#) or [Thawte](#). In terms of Docs2Web, configure this path to use HTTP instead of HTTPS. This way if an SSL certificate is used in the future, the only change needed from HTTP to HTTPS to make all pages on the website to use the SLL secure connection.

Microsoft IIS- Is an acronym for Microsoft **I**nternet **I**nformation **S**ervices. This is the web server that is included with Microsoft Servers. These web servers are capable of running ISAPI web applications.

Port- Besides the IP Address, the port is the part of the IP Address where website content will be directed. Typically HTTP always uses port 80 and HTTPS uses port 443. If another port is used, your web server will need to be configured to use that different port. You will also have to tell your browser of the different port used by including a ":" and port number after the IP Address or domain name used. The Docs2Web Trial is configured to use port 6789. This was done to not interfere with any other web servers that may already be running on that machine.

SSL- Is an acronym for **S**ecure **S**ockets **L**ayer. A protocol developed by for transmitting private documents via the Internet. SSL uses a cryptographic cryptography system that uses two keys to encrypt data; a public key and a private or secret key known only to the recipient. By convention, a URL that requires an SSL connection should start with [HTTPS](#) instead of HTTP.

Tags- In brief, HTML Tags are used to tell the clients' browser how to draw the webpage. Docs2Web also uses its own kind of tags, which are also embedded in the HTML template. These tags tell the Docs2Web application to fill in specific data about the website or from the database. Please read more about this in the [HTML Templates](#) section.

Web Application- An application that runs on or as a part of a web server.

Web Server- A computer that handles request from client browsers and returns content to the requesting browsers.

Security and Docs2Web

Security set in Docs2Web

The Configure Docs2Web program allows you to specify whether or not a user must log-in to the website, have the ability to search all the groups they are a part of at one time or not, and log when a user views or saves a document to disk. This is described in detail in the [Security Settings](#) section of this help file.

The Docs2Manage program controls who can access the website. This works in conjunction with the settings set with the Configure Docs2Web program.

If a Docs2Web log-in is required, check the "User must Log-in to Website" check-box. This will mean that every user will require a log-in name and password. These users can be added or modified in the "Groups and Users" area under the security menu of Docs2Manage under the "All Users" tab. Besides adding the user(s), groups they have access to must be defined. This can be done in the "Joining Users to Groups" area also under the Security menu of Docs2Manage under the "Join User to Group" tab. Select the proper group from the drop-down and check the "Has Web Access" for the users to have access to the respective group on the web.

If a Docs2Web log-in is not required, uncheck the "User must Log-in to Website" check-box. Then all users will have the same access. However, specific groups can be selected to make public. These groups can be added or removed by checking or unchecking the "Has Web Access" field in the "Groups and Users" area under the Security menu of Docs2Manage under the "Security Groups" tab.

Website or Web Server Security

In addition to the security layer in Docs2Web, it is recommended that websites that requires a login and password, which are considered private, also secure their website with [SSL](#) (Secure Sockets Layer), especially if the websites are available to the Internet. This not only prevents that the login and password from being intercepted by a third-party, but the actual documents as well. It is recommended that the entire website use SSL (HTTPS). However, websites that are on the Internet that do not require a login have no need for SSL, since anyone can retrieve these documents through normal browsing activities.

Image and File Support for Docs2Web

Image Formats

Docs2Manage has the capability store images in TIFF (1-bit B&W and 8-bit grayscale), JPEG (24-bit color), or PNG (24-bit RGB, 8-bit 256 indexed color, and 8-bit grayscale) formats stored at 200dpi or greater resolution. These image formats are either too large or not supported by the common browser for Internet usage. Docs2Web can resize images and change the format of the document images, so they are easy to view in a standard browser. To learn how Docs2Web does this, please read [Docs2Web Interface for Requesting Images or Files](#) section of this help file.

Image Conversions Table

Docs2Manage	Docs2Web via browser
Black & White Tiff	GIF 8-Bit
Grayscale Tiff	JPEG
JPEG	JPEG (just resized as specified)
PNG	JPEG

Docs2Web can Dynamically Create PDF's

Downloading the entire document at once is possible by creating a link that will request all pages of a document as a PDF. More on this in the [Docs2Web Interface for Requesting Images or Files](#) section.

NOTE: Any image can also be downloaded in the original format and size by using the "ToDownload" parameter as explained in [Docs2Web Interface for Requesting Images or Files](#).

Other File Formats

Docs2Web will also serve other documents types like MS Word, MS Excel, and other forms of media to a standard browser. If the client computer has the appropriate software to open that software, the browser will attempt to embed that document inside the browser. If planning to use a format that cannot be embedded into a browser, then the browser may ask to save it to disk, where it may be opened with the appropriate program later. Once again, use the "ToDownload" parameter as explained in [Docs2Web Interface for Requesting Images or Files](#) section to cause the browser to ask to save the file to disk.

OLE Formats

Docs2Manage allows documents to be created in OLE (Object Linking and Embedding) format. This, however, is not a good format for the web. As explained in the Docs2Manage documentation, OLE format is not a recommended format for this and other reasons. Storing files in their native file format is a much better alternative and is better for Docs2Web as well. If documents are already stored in OLE format, they may be able to be viewed using the free Docs2Manage OLE Viewer.

An Overview of Security Event Logging

Docs2Web has the ability to log when a document is viewed or downloaded. This log is stored in the same database table or area as the Docs2Manage Event Log and can be viewed or reported in Docs2Manage by clicking "View / Print Security Event Log" under the Security menu. The "CanViewDocPages" and "CanSave" rights are the referenced rights from Docs2Manage used by Docs2Web.

In order for security event logging to take place, "[Log Page View](#)" must be checked in the Configure Docs2Web program for the corresponding website. For complete traceability including the user login name, the "User Must Log-in to Website" must also be checked, which forces every user to log into a Docs2Web website. When this is unchecked, the user is always recorded as "D2WUser". In either case the date, time, right name, and IP Address is also recorded.

There are some limitations when logging from the web. When a document image is viewed, Docs2Web logs the right accessed as "CanViewDocPages", but the user can right-click that image and save that image to disk without ever sending a request to download to the Docs2Web application. Likewise, when a PDF is selected to be downloaded some browsers will open the document based on how they are configured. In this case Docs2Web only knows that the document is downloaded and logs it under the "CanSave" right.

When a user selects to download or view a PDF, all the images of that document are wrapped into one PDF document. For purposes of logging Docs2Web creates a log record for every page viewed or downloaded in that PDF file.

For more information about settings that tell the users browser to view or download and document image or PDF, please refer to the [Docs2Web Interface for Requesting Images or Files](#) section in this help file.

NOTE: Thumbnails, which are images resized to 300 pixels or less of width, are not consider a page view and are not logged.

System Requirements

Supported Operating Systems and Software

Docs2Web was designed to work on Windows 95/98/Me/NT 4/2000/2003/XP. Server operating systems like Windows 2000 or Windows 2003 Server are preferred. These operating systems also come with Microsoft IIS (Internet Information Server), which is capable of handling a Docs2Web websites.

Windows 95, NT 4.0, and older versions of Windows 98 may need to have MDAC 2.5 or later installed to use Docs2Web. Docs2Web may display an error message indicating this failure if this is the case. MDAC version 2.8 or higher can be freely downloaded from <http://msdn.microsoft.com/data/mdac/downloads/default.aspx>.

Hardware

Intel Pentium II processor (or equivalent) or greater
128 Mb Memory - 256 Meg Memory or greater is preferred

Web Server Support

Falcon Web Server (ISAPI Only)

Docs2Web includes the Falcon Web Server in the Docs2Web install program. The Falcon Web Server was developed by [Blueface Software Development Corporation](#) of Scandinavia. The Falcon Web Server became freeware in late 2005 meaning that its usage is not limited in any way, but it is no longer a product Blueface Software provides support for.

Microsoft IIS Web Server (ISAPI Only)

Docs2Web has been tested successfully on Internet Information Services (IIS) that comes with Microsoft NT 4.0 Server, Windows 2000 Server, Windows 2003 Server, or Window XP. If IIS does not appear to be installed, it can be installed under "Add or Remove Programs" in the Control Panel and select the "Add/Remove Windows Components". Check the component "Internet Information Services (IIS)" and click "next" to begin the installation process. Please be sure you are properly licensed to use Microsoft IIS.

OmniSecure Web Server (ISAPI or CGI)

Omnicon OmniSecure (HTTPd) web server from [Omnicon Technologies](#) of Canada has been successfully tested with Docs2Web. This is a free web server, but will expire every few months. Before that time there should be a new version available for download to extend the date of usage.

In theory, any web server capable of running Microsoft ISAPI technology should be capable to run a Docs2Web application. If planning to use a different web server than those listed above, please let us know your results, so our supported web server list can be updated.

Other Supported Web Servers

Abyss X1 Web Server (ISAPI Only)

Apache 2.0.55 (CGI Only)

NetworkActiv Web Server 3.5 (CGI Only)

Setting up a Web Server

General Setting on Any Web Server

Notes about IP Addresses and Server Ports - How public am I?

IP Address (TCP/IP Address)- This is a unique number assigned to any device, computer, or web server on the Internet. It is four groups of numbers ranging from 0 to 255 separated by periods like "192.168.1.13". IP Addresses that begin with:

10.0.0.0 - 10.255.255.25

172.16.0.0 - 172.31.255.255

192.168.0.0 - 192.168.255.255

are reserved IP Address ranges reserved for Local Area Networks (LAN or Intranet). **The IP Address 127.0.0.0 is also reserved as the localhost IP address, which is the address to use when testing a website or web application on your own computer only.** All other IP

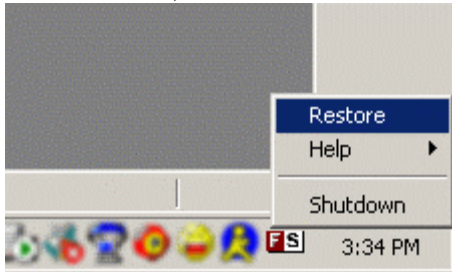
addresses outside these ranges are considered to be used by the Internet. That localhost IP address (127.0.0.1) is the address that Docs2Web is configured to use by default. This means that Docs2Web can only be tested on the computer where it is installed. Docs2Web can be tested on your Intranet or on the Internet by changing the IP address used by the [web server](#) and the Docs2Web [application](#). On a company network, obtain your company IP Address by going to the command prompt and typing "ipconfig" or contact your Network Administrator. To obtain your External IP (Internet) address, open your browser and visit a website like www.whatismyip.com. Please ask your network administrator about setting up your Docs2Web application on the Internet. Besides the IP Address, the port is the part of the IP Address where website content will be directed. Typically HTTP always uses port 80 and HTTPS uses port 443. If another port is used, your web server will need to be configured to use that different port. You will also have to tell your browser of the different port used by including a ":" and port number after the IP Address or domain name used. The Docs2Web Trial is configured to use port 6789. This was done to not

interfere with any other web servers that may already be running on that machine.

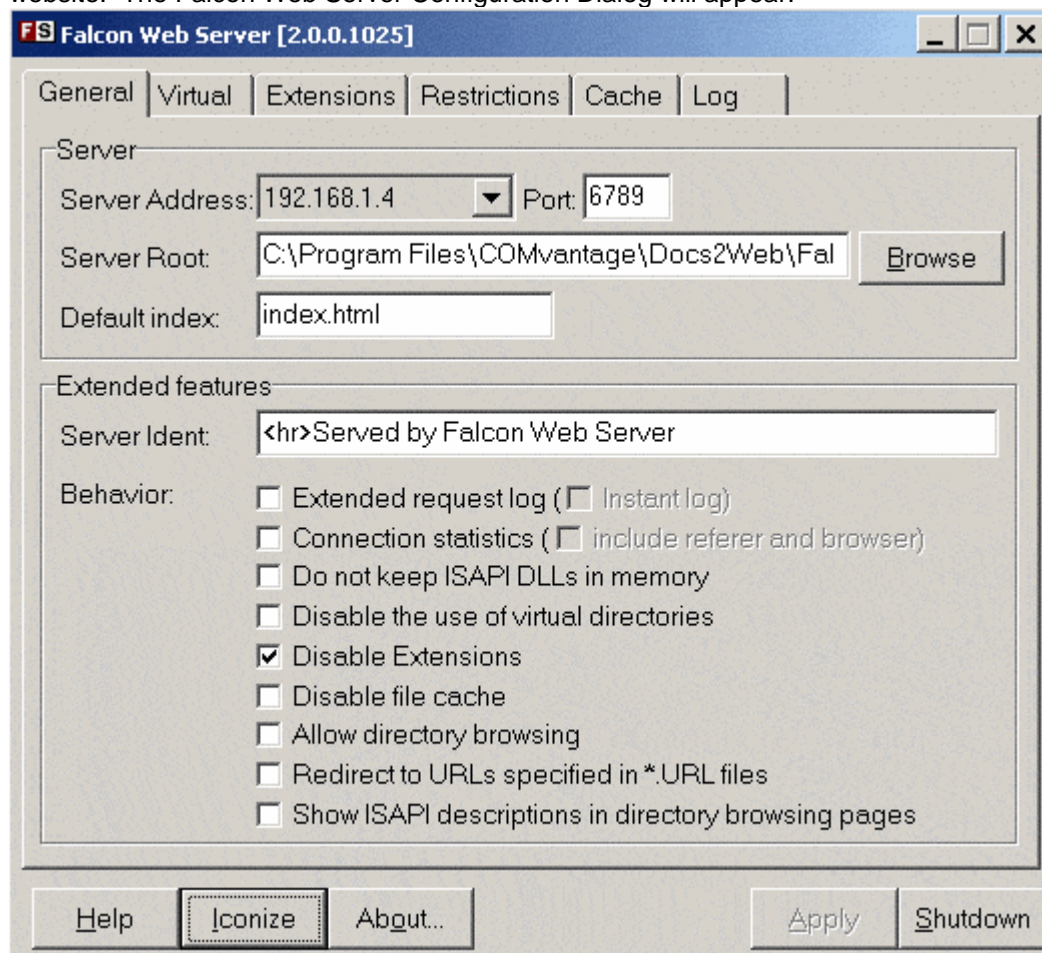
Falcon Web Server

The Falcon Web Server is installed and configured during the Docs2Web install process. The install pre-configures the web server to use all local IP Addresses including 127.0.0.1, which is for browsing on the local machine, to use port 6789, so not to interfere with any other web server you may have running on your machine, and set the ISAPI or virtual path for the website to the Docs2Web application path (usually "C:\Program Files\COMvantage\Docs2Manage\Docs2Web\d2w-cgi-bin") along with the right to execute the Docs2Web application.

To change the configuration of the Falcon Web Server, start the web server if it is not running. When the server is running, you will either see the "Falcon Web Server" on the task bar like a standard application or in the system tray, usually found in the lower-right corner of the screen near the clock, as a red and white box containing the letters FS as shown below:

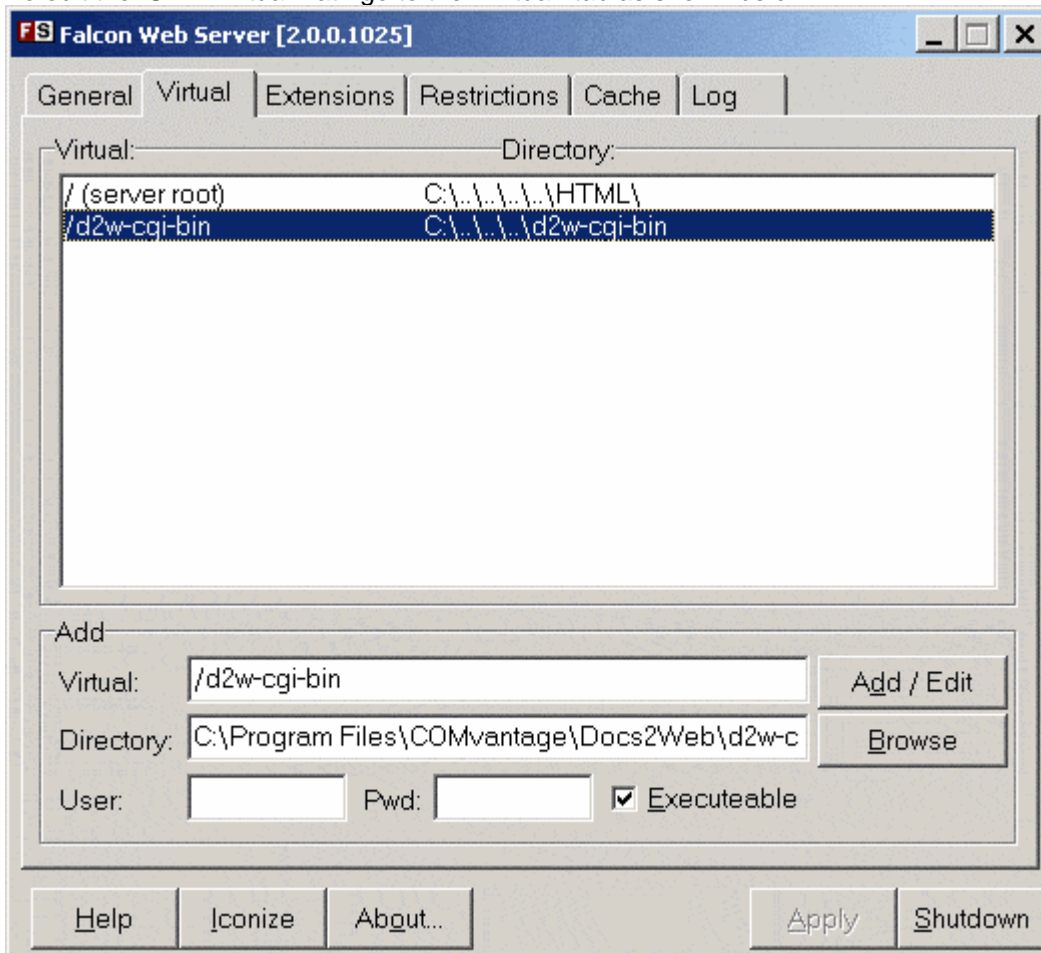


To start the Falcon Web Server, click the "Start" (menu) -> "Programs" -> "Docs2Web" -> "Falcon Web Server" -> "Start Falcon Web Server" to load the interface to administer the web server and website. The Falcon Web Server Configuration Dialog will appear:



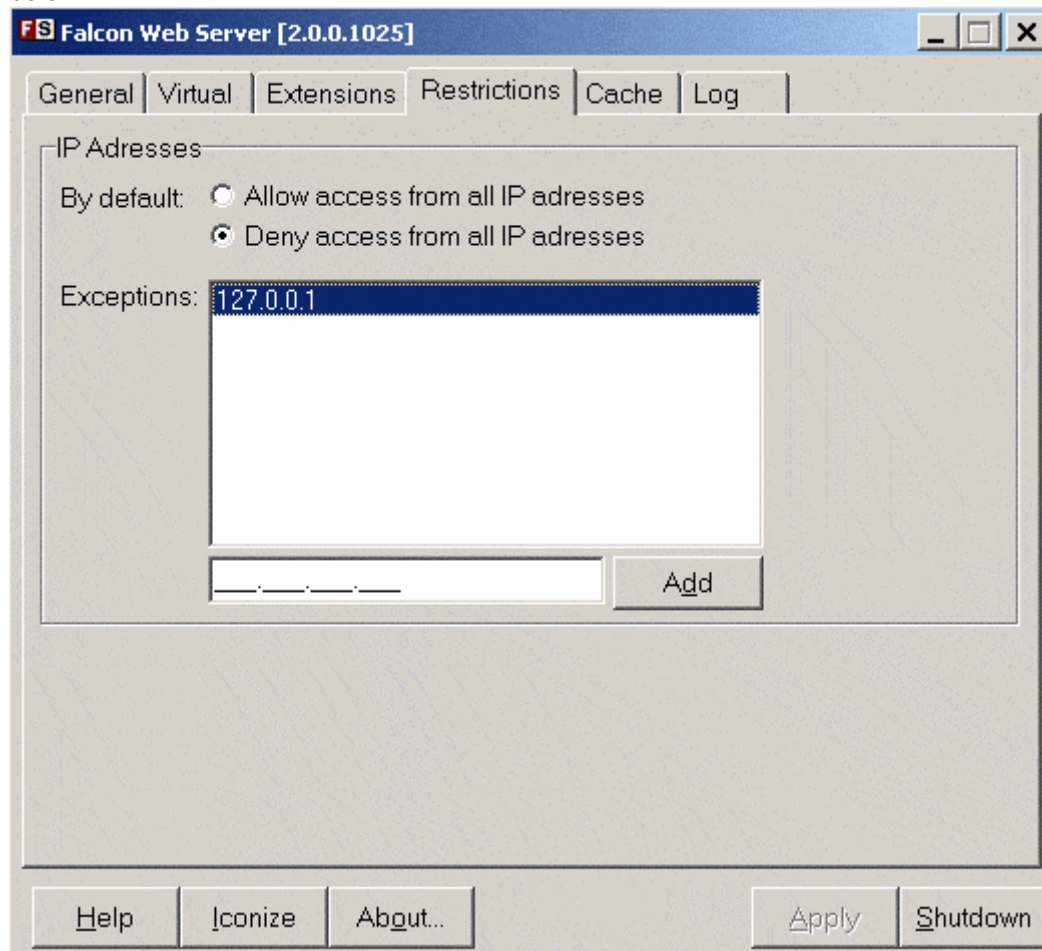
The Falcon Web Server does not allow you to change the IP Address, but does listen to all known IP Addresses. On the General tab (shown above), you will see a drop-down with all the IP Addresses the Falcon Web Server will respond to. However, you can change the port number on this screen. The port number should match the port number in the [Website Settings](#) in the Configure Docs2Web program.

To edit the ISAPI Virtual Path go to the "Virtual" tab as shown below:



Click to highlight the ISAPI Path if it is already listed in the window. If not, type the name of the desired virtual path in the "Virtual:" field. The virtual path setting should match the DLL Path (or EXE Path for CGI version) setting in the [Website Settings](#), but should also include a "/" character. Next, click the "Browse" and select the Docs2Web application path (usually "C:\Program Files\COMvantage\Docs2Manage\Docs2Web\d2w-cgi-bin"). This should match the directory name of the [Docs2Web Application Location](#) less the .dll or .exe filename. Also, check the "Executeable" (Executable) checkbox so the Falcon Web Server knows to execute all Docs2Web applications in that directory. Finally, click the "Add / Edit" button to save the changes or to add the new virtual directory.

To control who can access the Docs2Web application, the Falcon Web Server allows you to restrict the IP Addresses that can access the web server on the "Restrictions" tab as shown below:



By default, the Docs2Web install configures the web server to restrict all IP Addresses besides the localhost IP Address of 127.0.0.1. To remove this restriction, highlight the address and press the delete key. Add other IP Address restriction in this section.

Once all changes have been made, click the "Apply" button, click "Shutdown" the web server, and start the web server as indicated above.

Click the "Iconize" button to have Falcon Web Server run as a small icon in the system tray only.

Microsoft IIS Web Servers

For more detailed instructions, please refer to the documentation that comes with IIS about installing an ISAPI Application or extension. Here are some general directions for IIS:

- 1) Load the Internet Information Services console and create or edit a website that will host the Docs2Web application that matches the [Website Settings](#) in the Configure Docs2Web program. Only the "Read" right is necessary. DO NOT SELECT THE "WRITE" RIGHT.
- 2) Right-click the website and choose properties from the pop-up menu.
- 3) Next select the "Directory Security" tab and click the "Edit" button in the Anonymous Access section.
- 4) Make sure "Anonymous access" is checked, since Docs2Web will control the user authentication.
- 5) For the User Name field, click the Browse button and select a user that is in the

"Administrators" group or use the "Administrator" user.

6) Uncheck the "Allow IIS to control password" and type in that corresponding user's password.

7) Start the "World Wide Web Publishing" service if it is not running and test if the site is accessible.

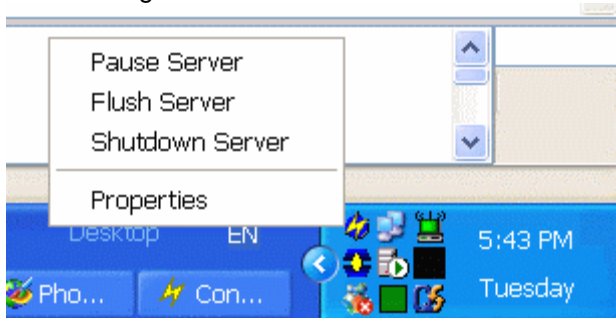
8) In IIS version 6 and higher, Add a Web Service Extension entry in the Internet Information Services console containing the full pathname to this DLL and enable the application extension.

9) Place the DLL in a virtual directory that matches the [DLL Path](#) in the Configure Docs2Web program and make sure "Scripts and Executables" permission turned "on" for that directory.

10) Finally, test the website. Please see the [Troubleshooting](#) section if you encounter any difficulties or contact [Docs2Manage Support](#).

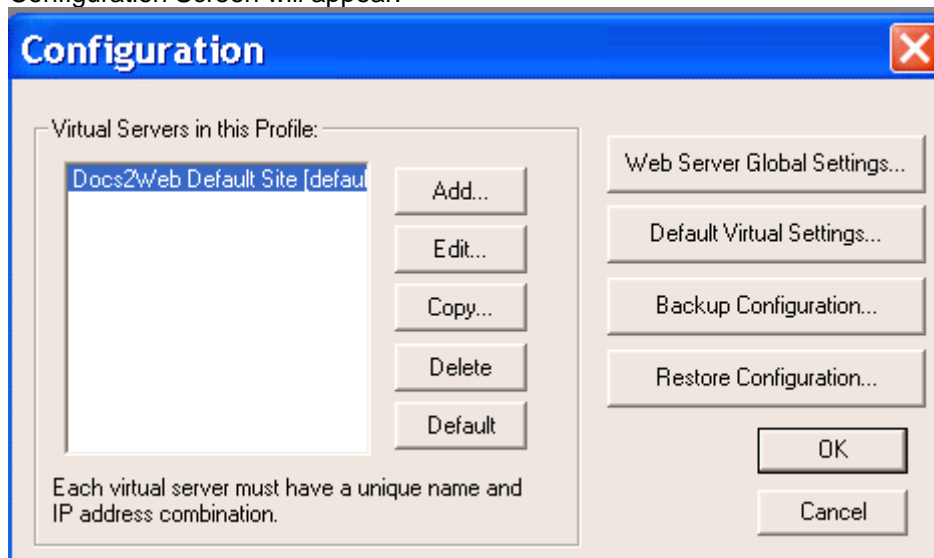
OmniSecure Web Server

To configure the OmniSecure web server, first shut down the web server if it is running. If the server is running, you will see a blue circle with a lightning bolt in the system tray usually found in the lower-right corner of the screen near the clock as shown below:



To stop the OmniSecure web server, right-click the icon in the system tray and select "Shutdown Server" from the pop-up menu.

Next, click the "Start" (menu) -> "Programs" -> "OmniSecure" -> "OmniSecure 3.0 Administration" to load the interface to administer the web server and website. The OmniSecure Main Configuration Screen will appear:



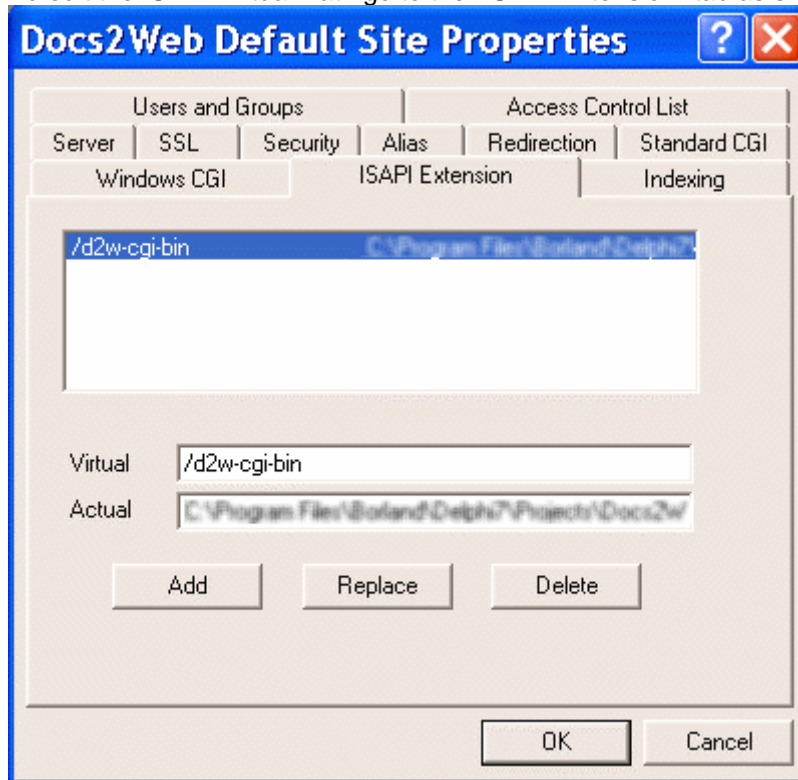
To change the IP Address or the ISAPI Virtual Path, click the "Docs2Web Default Site" and click the edit button.

To edit the IP Address, go to "Server" tab as shown below:

The screenshot shows the 'Docs2Web Default Site Properties' dialog box with the 'Server' tab selected. The 'Server IP' field is highlighted with a blue selection box and contains the text '127.0.0.1:6789'. Other fields include 'Server Name' (Docs2Web Default Site), 'Server Root' (C:\OmniSecure\htdocs), 'Default Index' (index.html), and 'Admin Email' (your@email.here). There is a checkbox for 'Update this Server IP with the Dynamic IP' which is unchecked. Below is an 'Error Template' section with a checked 'Use Custom Error Template' checkbox and a field containing 'C:\OmniSecure\ERROR.TEMP'. 'OK' and 'Cancel' buttons are at the bottom.

To change the Server IP address to control whether the website is only to be seen on the local computer, intranet, or Internet. If using a registered domain name, enter the IP Address of that domain name to be used for the Docs2Web website. This setting should correspond to the HTTP path in the [Website Settings](#), but the setting needs to only be the IP Address. Do not include the "http://" or port information.

To edit the ISAPI Virtual Path go to the "ISAPI Extension" tab as shown below:



Click to highlight the ISAPI Path to be modified and click "Edit" or click "Add" to create a new one. The virtual path setting should match the DLL (or EXE for CGI) Path setting in the [Website Settings](#), but should also include a "/" character. The Actual (disk location) should point to the Docs2Web application path (usually "C:\Program Files\COMvantage\Docs2Manage\Docs2Web\d2w-cgi-bin"). This should match the directory name of the [Docs2Web Application Location](#) less the .dll or .exe filename.

To edit the web server's port setting, click the "Web Server Global Settings..." button. Under the "Network" tab you will see the "Port" and "Secure Port" fields. Docs2Web comes pre-configured to use 6789 for the Port setting. This avoids any conflicts with other web servers that may be installed on that system. This setting should correspond to the port portion that follows the IP Address or domain name in the HTTP Path field in the [Website Settings](#). If no port is specified in the HTTP Path field then port 80 should be used in the Port field in OmniSecure.

The Secure port should always remain port 443, but if it is changed it should correspond with the port used in the HTTPS Path field in the [Website Settings](#). If no port is specified in the HTTPS Path field, port 443 should be used in the Port field in OmniSecure.

Troubleshooting

In Docs2Web there could be two types of errors, both handled and unhandled.

Handled Errors or Conditions

Handled errors are those types of errors or conditions will be stated as a message in a browser. These conditions or errors are (with remedy in parenthesis):

No license has been loaded to begin the trial or full version of Docs2Web. If attempting to use the trial version, please run the Docs2Web Install program again or run the Docs2Web Configure

program to install the trial license. Please feel free to contact support if you feel you received this message in error.

(This is caused by a failure with the Docs2Web software or the software was installed without using the Docs2Web installer. To fix this problem, run the Configure Docs2Web program. This should install the trial license. If this still does not work, you may need to re-install Docs2Web)

An invalid license or the web server's clock date has been turned back. Please use the Docs2Web Configure program to load a valid license or adjust the server's clock to its former date. Please feel free to contact support if you feel you received this message in error.
(As explained above)

Cookies are not enabled in your browser. Please enable your browser to allow cookies. Please feel free to contact support if you feel you received this message in error.
(As explained above, but also make sure you are not using another program that blocks cookies)

You have exceeded the number of allowed documents or page records (Max records: ???) this license allows. Please feel free to contact support if you feel you received this message in error.
(The trial only allows 1,000 pages total before this message will be displayed. The full version should not display this message unless a document limit was added to the issued license.)

You have exceeded the number of allowed concurrent users (Max number of users: ???) that this license allows. Please feel free to contact support if you feel you received this message in error.
(If many users are receiving this message, then you may need to purchase a license that handles more concurrent users within a 5 minute period. The trial version of Docs2Web only allows 5 concurrent users within a 5 minute period.)

The license installed on this web server is too old to use this version of Docs2Web. Please feel free to contact support if you feel you received this message in error.
(The install program should have not allowed the update to be installed, but if you do receive this message and it is valid, you can either install the last prior version of Docs2Web you are entitled to or purchase an upgrade license to use the newest version of Docs2Web.)

The lease of Docs2Web has expired. Please feel free to contact sales about your lease.
(As explained above)

The trial version of Docs2Web has expired. Please feel free to contact sales about purchasing Docs2Web. Your machine ID for your web server is: ???
(As explained above. Please contact sales about purchasing a full license.)

Unhandled Errors

Unhandled errors may cause the browser like MS Internet Explorer to return a generic non-descriptive error message page. This will not help to solve the condition that is causing the error. To see a more descriptive error message, uncheck the "Show Friendly Error Messages". This setting can be found under the "Tools" (menu) -> "Internet Options" -> "Advanced" tab. This will hopefully shed light on the problem so the condition can be corrected.

For assistance with either handled or unhandled error messages, please contact technical [support](#).

Chapter 2 – Configuring Docs2Web Configuration Overview & Registration The Configuration Program

Use the Docs2Web Configuration Program to configure your [database connections](#), web server, and website settings. Additional help is available from within the program by clicking or setting focus on the control or field you need help with and pressing the <F1> key. You may also select **What's this?** from the **Help** menu and then click the control or field to receive specific help.

The screenshot shows the 'Configure Docs2Web' application window. It has a menu bar with 'File', 'Registration', and 'Help'. The window is divided into three main sections: 'General Options', 'Website / Connection Settings', and 'Advanced Settings'. At the bottom, there are three buttons: 'Undo', 'Save', and 'Exit'.

General Options

- Docs2Web Install or Website Master Directory
 - Installation Directory: C:\Program Files\CDMvantage\Docs2Web (Also the directory where the website folders and templates will be stored)

Website / Connection Settings

- Connection or Website Number / Name: 1 (dropdown), Test Website (text)
- Connection Name: Test Connection (text)
- ADO Connection String: Provider=Microsoft.Jet.OLEDB.4.0;Password='';Data Source=C:\Program Files ... (text) [Test]
- Search Drop-down Text: No Preference (text)
- HTTP Path: HTTP://192.168.1.100 (text)
- HTTPS Path: HTTP://192.168.1.100 (text)
- DLL Path (Virtual Directory): scripts (text)
- Relative Path (to Installation Directory): d2w (text) [Make Directory and Sub-Directories]
- Actual Website Directory Path: C:\Program Files\CDMvantage\Docs2Web\websites\d2w (text)
- Docs2Web Application Location: C:\Program Files\Borland\Delphi7\Projects\Docs2Web\D2W.dll (text) [Save]
- Users Must Login to Website Search All Groups at Once
- Log Page Views

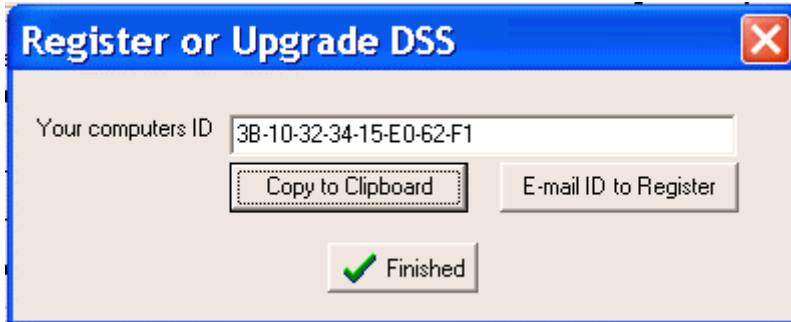
Advanced Settings

- Log for Debugging (do not use in production)

Registering Docs2Manage

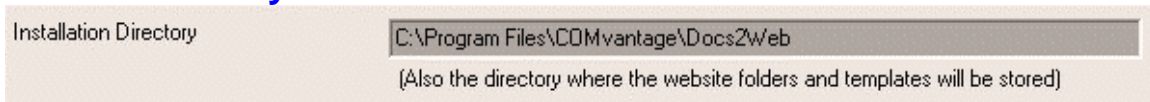
Once Docs2Web is registered, all the limitations of the trial version are lifted. Also, the registration reminder will not re-appear anymore in the Configure Docs2Web program. For more details on these limitations, read about [The Trial Version](#) section in this help file.

To register, click **Request for License** under the **Registration** menu. The registration dialog will open and display the Computer ID specific to your computer. The Computer ID is needed when you purchase a license.



To purchase Docs2Web, please visit the [Docs2Manage website](#) or contact [Docs2Manage Sales](#).

Install Directory



This is the location where Docs2Web was installed. This field cannot be modified. This is the directory that will also store the HTML templates for all the websites in sub-folders as specified by the [Create Template Directories Button](#).

Connection Number, Website Name, and Connection Name



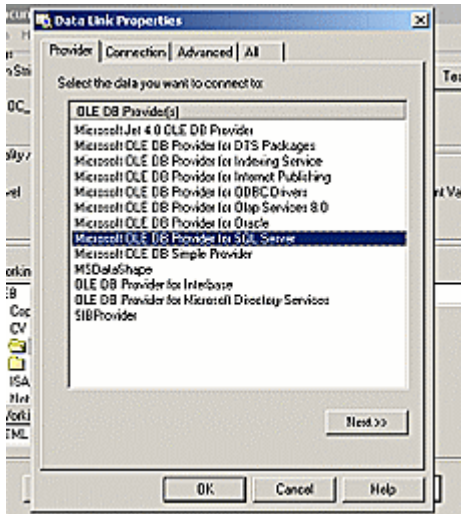
The Docs2Web trial is installed with two pre-configured database connections. The trial can only use or be tested using connection 1 or 2. Typically a registered copy of Docs2Web only allows the use of the first (1) connection unless an additional license was purchased for the use of additional website to be run on the same web server. Please refer to [Configuration Overview & Registration](#) about this topic.

The connections can be modified or new connections can be created (you can only modify due to database connection limitation in the trial version). To create a new connection, click the **up arrow** on the **Connection Number / Connection Name** fields until you see **** Unused Connection **** in the **Connection Name** field. Rename existing or new connections with a friendly name. The **Connection Name** is the name of the connection you will see inside Docs2Manage. The Website Name field is only used for reference at this point.

ADO Connection String

ADO Connection String	Provider=Microsoft.Jet.OLEDB.4.0;Password='';Data Source=C:\Program Files ...	Test
-----------------------	---	------

Click the **three dots** button on the right side of the **ADO Connection String** field to display the Microsoft ADO Connection String builder dialog:



At any time while in this dialog, more detailed help can be obtained by clicking the **Help** button in the lower portion of the dialog or refer to your database's instructions on using an ADO connection. If using the provided Microsoft Access table, this string should already be configured and ready to use, but the location of this file can be changed or use a completely different file, if desired. In general, choose the provider for the database to be use on the **Provider** tab. Enter the location and login credentials for the database on the **Connection** tab.

NOTE: You must choose to save the password to the database connection or Docs2Web will not be able to access the Docs2Manage database.

ALSO NOTE: If the server type is not available in the ADO dialog, the ADO driver or database client may not be installed on that system. Please install the proper software for your database. Please consult with your database vendor or documentation about client software and the use of an ADO provider.

After the database connection is configured, test the connection by clicking the **Test Connection** button.

Save changes at any time by clicking the **Save** button.

Testing the Database Connection

Click the **Test Connection** button to test the database connection. This is the connection that will be used by the Docs2Web website.

If the connection is not successful, you will be prompted why the connection failed.

NOTE: This function only test that the database connection is valid. It does not test whether or not the Docs2Manage tables exists or that you have the proper rights to these table.

Search Drop-down Text

Search Drop-down Text	No Preference
-----------------------	---------------

This is the search drop-down initial fill text before the web user selects criteria from a document search drop-down. By default, this field is filled with "No Preference", but this field allows other text or languages to be used, since this is the only text that is inaccessible in the [HTML Templates](#).

Website Settings

HTTP Path	HTTP://192.168.1.100
HTTPS Path	HTTP://192.168.1.100
DLL Path (Virtual Directory)	scripts

These important settings must agree with the [settings used on your web server](#).

HTTP Path is the non-secure path. Include the port number if a port other than 80 is used. The format of this field is:

http://{IP Address or Domain name} Optional- ":port number"

HTTPS Path is the secure path. Include the port number if a port other than 443 is used. Note: an SSL certificate is required to secure your website. Please consult your web server documentation about securing your website. The format of this field is:

https://{IP Address or Domain name} Optional- ":port number"

DLL Path (or EXE path) is the virtual website path of the ISAPI or CGI directory. Do not include slashes in this field.

These setting also replace web server related tags in the HTML templates. These tags are:

[[#HTTPPath]] - Replaced with the value in **HTTP Path**

[[#HTTPSPath]] - Replaced with the value in **HTTPS Path**. If using HTTPS include the "https://" at the beginning of this value, if not use "http://" instead.

[[#DllPathAndName]] - Replaced with the value in **DLL Path** and forward slash and DLL or EXE Name as derived from [Docs2Web Application Location](#)

Website Relative Path

Relative Path (to Installation Directory)	d2w	Make Directory and Sub-Directories
Actual Website Directory Path	C:\Program Files\CDMvantage\Docs2Web\websites\d2w	

This is the relative path of the website based on the installation path of Docs2Web. This ultimately controls where the template and temporary directories will be located as stated in the **Actual Website Directory Path** just below this field.

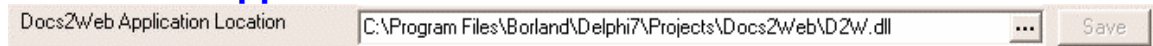
NOTE: Be sure to not to use path used by another Docs2Web website or undesirable errors could occur. Each Docs2Web website should have their own path so that each site can have its own set of HTML templates and a dedicated area to create temporary files.

Create Template Directories Button

This button will appear active when the website's template and temporary directories have not yet been created. The template directory will be the location where the HTML templates will be store for the website. These HTML templates will be created as the respective areas are browsed by a Docs2Web web user. More information about this can be found in the [HTML Templates](#) section

in this help file.

Docs2Web Application Location

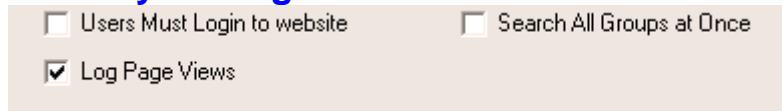


This must be set in order for the website to function or the website will return an error. This assures that the specific database is only being accessed by one Docs2Web application, which would violate the Docs2Web licensing agreement.

If the website is being set-up the first time or the location is new, the **Save** button will appear as active. Click this button to create an instance of the Docs2Web application in that location.

NOTE: By default Docs2Web assumes the Docs2Web application is an ISAPI web application. If you need to use a CGI application instead, select the application location and click the "Save" button as necessary, but replace the ".dll" with ".exe" manually in the field, so Docs2Web knows the correct file name. Then manually copy the provided CGI application to the application location as stated.

Security Settings



Users Must Login to Website

When this option is checked, the website user must login into the site to do anything. The user should login using the same user name as used in Docs2Manage. The password can only be set or changed in the "Groups and Users" area of Docs2Manage. If this option is unchecked, there will not be any prompt to log into the website; the website shall be considered public to the extent of how public the web server is.

Search All Groups at Once

Check this option if you build the search pages to only use a keyword search and not any of the group specific fields. In fact, the website will return an error if there are any request to build a HTML drop-down for a field when search all groups is on. This is because that group specific fields may have two completely different set of values for the different groups. This option when checked, will allow keyword searches to span all group the user has rights to. If desire to have group specific fields in your Docs2Web search page, uncheck this option. This will allow different search pages to be built for each security group as described in the [HTML Templates](#) section in this help file. Also, this option when unchecked will mean that any searches including keyword searches will only search and return results from the current group the web user is active in.

NOTE: If there is only one security group in your Docs2Manage database, unchecking this option will offer the most flexibility building the HTML template for the search area.

Log Page Views

When this option is checked this logs whenever a web user views a document page, downloads a document page, or downloads a document as a PDF. The description is based on the CanViewDocPages and CanSave right from the **Rights, Roles, and Event Logging** section from Docs2Manage. The viewing of thumbnails less than 300 pixels are not logged as a page view. The **Users Must Login to Website** option must be on in order for logging to record user specific information. When this option is off, no specific user information is logged.

Advanced Settings

Log for Debugging (do not use in production)

Log for Debugging

This setting should only be turned on if instructed by Docs2Web support. This will save log information to a file named "debug_{the current date in yyyyymmdd}_log.txt". This information contains the detailed activity the Docs2Web application is performing. Do not leave this checked on a production website, since a high number of request will have to wait in queue to be written to the log text file.

NOTE: On some web servers, this file will be named based on the date for every day where there is web activity on the server, and for other web servers the name will be based on the date of the first activity against the Docs2Web application after the web server is started.

Saving Settings

The **Save** button saves any changes since the Configuration program was loaded or since the button was last pressed. These changes are saved into the system registry, where the Docs2Web application can access them when the Docs2Web application is first accessed.

NOTE: If the Docs2Web application or website is in use or has been used since the web server started, the website or web server will need to be restarted for any changes to be applied to the respective Docs2Web websites.

Undoing Changes

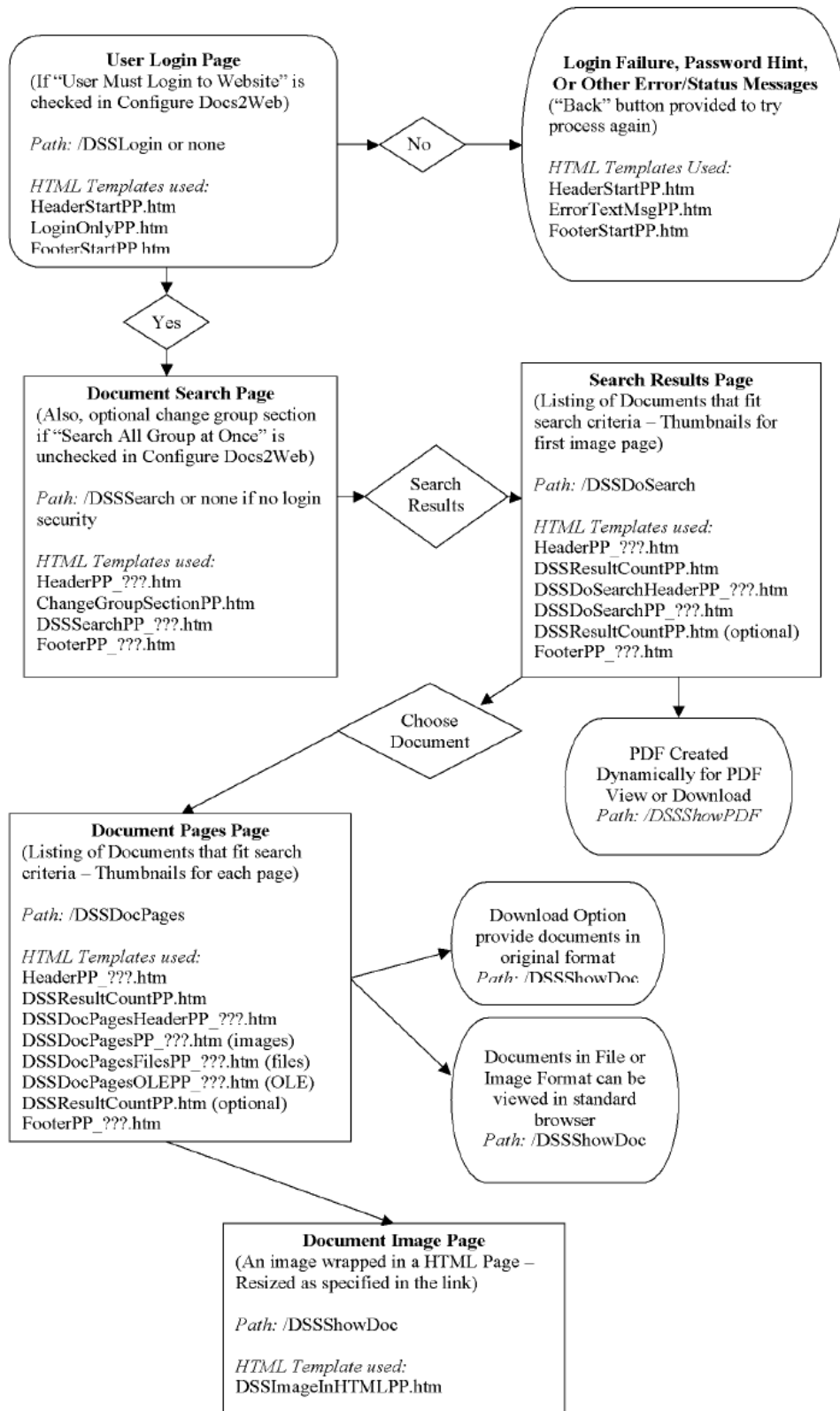
The **Undo** button will cancel any changes since the Configuration program was loaded or since the save button was last pressed.

Exiting the Configuration Program

The **Exit** button exits the Configuration program. If changes were made to the configuration, you will be prompted to save or cancel any changes.

Chapter 3 – Managing a Docs2Web Website Website Map (on next page)

Docs2Web Website Map



Docs2Web Map Explained

The Docs2Web map consists of several pages, which makes up a Docs2Web website. This map will help determine which path and HTML templates make up a page.

Path

The "path" refers to the path of the Docs2Web application. For example:

`http://127.0.0.1:6789/d2w-cgi-bin/D2W.dll/dssdosearch?DocNumStart=1&DocNumEnd=10`

The path in this case is "dssdosearch". Everything after that point is considered to be parameters.

HTML Templates

The "HTML Templates" refer to the parts of a webpage that make up the entire page the user sees. For example, the Document Search Page is made up of some or all of the following templates.

HeaderPP_???.htm

ChangeGroupSectionPP.htm

DSSSearchPP_???.htm

FooterPP_???.htm

The main reason Docs2Web is using this method to build a page is that the parts are reusable. For example, the HeaderPP_???.htm and FooterPP_???.htm is used by most of the pages Docs2Web uses. This gives a consistent feel to the website and decreases the amount of HTML code needed to build the website.

A Note about Security Groups

As noticed on the map, many of the templates end with a "_???.htm". This signifies that every security group in Docs2Manage gets their own set of HTML templates. For example, "DSSSearchPP_000000001.htm" is the Document Search Page for the group with the ID 1 from Docs2Manage. This is useful to give each group a different look, use different search fields and labels, and different result field names. If you elect to search all groups at one time, then the group number is not part of the filename (i.e. DSSSearchPP.htm).

Please use the Configure Docs2Manage to determine the location of the HTML templates. Any page that does not have its corresponding template created in the HTML Template directory can have those templates created by browsing that corresponding page in Docs2Web. Keep in mind that this must be done for every group, since each group has their own set of HTML Templates.

Please read more about this in the [HTML Templates](#) section in this help file.

HTML Templates

Docs2Web uses many HTML Templates to build the many different pages of the Docs2Web website. This section explains all the available fields, tags, and purpose of each template. These templates can certainly be built from scratch with the information available in this section; however, there is an easier way. All of these templates will be automatically created for all groups if you browse all the possible pages as shown in the [Website Map](#) for every security group. All of these templates will be created to contain most or all of the possible tags. They are

created as you browse the specific page that contains the different templates. Once they are created, Docs2Web will not overwrite them. The templates are created using the most basic HTML, so they should be easy to read and modify. It is suggested to remove the tags or fields you do not want displayed first. To start over, simply delete the template and Docs2Web will recreate it if you browse that page again. The changes can be viewed by saving the template and refreshing the page that uses that HTML template. The templates can be edited while the Web Server is running, since the Docs2Web application loads the templates as needed. The look for your Docs2Web website can also be changed by modifying the HTML templates.

Refer to the [Website Map](#) for the general navigation of a Docs2Web website and what HTML Template each page uses. Many of these templates have specific tags that are filled with information from the Docs2Manage database. There are also a few global tags that are replaced with website information. These global tags include:

[[#DIIPathAndName]] - This is the summation of the "DLL Path", a forward slash, and the filename portion of the "Docs2Web Application Location"(for example: "d2w-cgi-bin/D2W.dll"). This is needed for every form section in the HTML to tell the web server's application location followed by the action the server will submit to the Docs2Web application. An example of this in HTML code:

```
<FORM ACTION="/[[#DIIPathAndName]]/dssdosearch" METHOD="GET">
```

NOTE: In most case this tag should be preceded with a forward slash.

[[#HTTPPath]] - This is replaced with the "HTTP Path" and a forward slash (for example: "HTTP://127.0.0.1:6789/"). This tag is not used in any of the provided templates, since the website should be all HTTP or all HTTPS if you have an SSL certificate.

[[#HTTPSPath]] - This is replaced with the "HTTPS Path" and a forward slash (for example: "HTTPS://127.0.0.1:6789/"). This tag is not used in any of the provided templates, since the website should be all HTTP or all HTTPS if you have an SSL certificate.

[[CurrentGroupName]] - This tag is replaced with the group name. This would typically be used on the "Document Search Page" or pages below that in the [Website Map](#) on a website where "Search All Groups at Once" option is uncheck in the Configure Docs2Web program.

Group Specific Templates

Many of the HTML templates are considered group specific. This means that when "Search All Groups at Once" option is unchecked in the Configure Docs2Web program, the template listed below that end with a "_???.htm" will be replaced with the zero-padded group number, which is based on the DOCGROUP_ID database field. **These templates will be created for every group by browsing through every page for every different group.**

HTML Templates

HeaderStartPP.htm- This is the HTML header page (contains the <HTML> tag) for pages that do not require or do not have group specific purpose. The User Login Page and Error/Status Message Page never use group specific information. They might be considered the Header for the company or organization.

FooterStartPP.htm- This is just like the HeaderStartPP.htm template, but is the HTML footer page (contains the </HTML> tag).

HeaderPP_???.htm- This is the HTML header page (contains the <HTML> tag) for pages that do have group specific purpose. All the pages beside the User Login Page, Document Image Page, and Error/Status Message Page use this header. A Header template will be created for every group in the Docs2Manage database. This page can be made to give each group its own look or heading.

FooterPP_???.htm- This is just like the HeaderPP_???.htm template, but is the HTML footer page (contains the </HTML> tag).

LoginOnlyPP.htm- This template is a submission form section of the User Login Page. This section provides (1) a method to log-in to the Docs2Web website and (2) request for a password hint.

Form:

Path is /trylogin

Method is GET or POST

Fields (case sensitive):

LoginName (type: text)- Input field where user can type in their user name to log-in to the website or request for the password hint

Password (type: text)- Input field where user can enter their password to log-in to the website.

Submit Buttons (case sensitive):

Two buttons both named "Submit". The button that is used to request for a password hint should have the value and purpose "Display Password Hint" and the other is "Log-in".

ErrorTextMsgPP.htm- This template is the body of the Error/Status Message Page. The tags should not be removed.

Tags:

[[#TheMessage]]- This is replaced with the actual error or status message.

[[#GoBackCaption]]- This is a Java script link to tell the user to return to the last page. This tag is replaced with the message that reminds the user to go back to the last page.

ChangeGroupSectionPP.htm- This template is a submission form section that allows the user to change group if "Search All Groups at Once" option is uncheck in the Configure Docs2Web program and the user has rights to more than one group. This template is to be used in the Document Search Page only.

Form:

path is /dssdochangegroups

Method is GET only

Fields (case sensitive):

ChangeGroups (type: select)- This drop-down field populates with the group names (and ID values) a user has rights to.

Submit Buttons (case sensitive):

DSSChangeGroups- Button should have a value of "Change Groups". When this button is pressed, it will change the group to the new group the user has selected and reload the Document Search Page.

DSSSearchPP_???.htm- This template is a submission form section of the Document Search Page. Fields in this form used for submitting search criteria are named by the name used in the database field and not by the friendly name as given in the Field Manager in Docs2Manage, but can be labeled as desired in the HTML template.

Form:

path is /dssdosearch

Method is GET only

Fields (case sensitive):

DocNumStart (type: hidden; default: 1)- This field tells the search to start with record 1. This normally should not be changed.

DocNumEnd (type: hidden; default: 10)- This field tells the search to end with record 10. This normally should not be changed, unless you change the DocNumIncr field.

DocNumIncr (type: hidden; default: 10)- This field is passed along to the search results and tells how many documents will be displayed per page.

DATESTART (type: text)- This field looks for documents greater than or equal to the provided date against the DOCMAIN.DATEOFDOC field. Set the value of this field to [[DATESTART]] if you want the field to be filled in with the date of one year ago. The value can also be set to a

literal date like "01/01/2000".

DATEEND (type: text)- This field looks for documents less than or equal to the provided date against the DOCMAIN.DATEOFDOC database field. Set the value of this field to `[[DATEEND]]` if you want the field to be filled in with the current date plus one day.

DOCENTITY (type: select or text)- This field looks for documents that fit the given criteria against the DOCMAIN.DOCENTITY field. If the database field is defined as a Field Edit in Field Manager in Docs2Manage then the search is a contains search, and if the field is defined as a Drop-Down Edit field then the search is an exact match type search. Docs2Web does not know whether the field is a select or text field in HTML, so Docs2Web relies on how the field is defined in Docs2Manage (Field Manager).

DOCFOLDER (type: select or text)- This field functions just like the "DOCENTITY" fields listed above, but against the DOCMAIN.DOCFOLDER database field.

DOCTYPE (type: select or text)- Same as above- DOCMAIN.DOCTYPE.

DOCSOURCE (type: select or text)- Same as above- DOCMAIN.DOCSOURCE.

IMPORTANCE (type: select or text)- Same as above- DOCMAIN.IMPORTANCE.

DOCREF (type: select or text)- Same as above- DOCMAIN.DOCREF.

DocKeywords (type: text)- This field performs a search like the keyword search in Docs2Manage against all text fields including Document Explorer folder names, OCR results, and all other text fields. Multiple words can be search by separating the words with spaces.

DoOrSearch (type: checkbox)- When this field is "checked" (value: DoOrSearch) it makes the keyword search perform an "or" search. If the field is not checked (or doesn't exist) then an "and" search is performed.

Submit Button:

The button name is "DSSSearch" and its value should be "Search". This button sends the search criteria to the Docs2Web application.

Reset Button:

Does not submit any information, but does reset any drop-down fields back to the first value and clears any text edit fields.

Tags:

`[[DATESTART]]` or `[[DATESTART1YEAR]]`- This tag can be placed in the DATESTART text field to fill the that field with the current date less one year.

`[[DATESTART2YEAR]]`- This tag can be placed in the DATESTART text field to fill the that field

with the current date less two years. Also, available: `[[DATESTART3YEAR]]`,

`[[DATESTART5YEAR]]`, `[[DATESTART10YEAR]]`, `[[DATESTART25YEAR]]`

`[[DATEEND]]`- This tag can be placed in the DATEEND text field to fill the that field with the current date plus one day. One day is added to assure that the entire current date result are also included, since some databases consider a date as 12am.

`[[DOCENTITYCombo]]`- This tag tell the Docs2Web application to dynamically create a HTML drop-down field based on the values defined for DOCMAIN.DOCENTITY in Field Manager from Docs2Manage for the specific group the user is logged into. The resulting drop-down is named "DOCENTITY" to match the name needed to perform the search against that field.

`[[DOCFOLDERCombo]]`- This tag is just like `[[DOCENTITYCombo]]`, but against the DOCMAIN.DOCFOLDER database field and is named "DOCFOLDER".

`[[DOCTYPECombo]]`- Same as above.

`[[DOCSOURCECombo]]`- Same as above.

`[[IMPORTANCECombo]]`- Same as above.

`[[DOCREFCombo]]`- Same as above.

DSSResultCountPP.htm- This is used by the Search Results Page and the Document Pages Page. This section surrounds the results table with current number of results range and the total result count. This section also adds links to the next or previous set of results.

Tags:

`[[#DocNumStart]]`- This tag is replaced with the lower result range number for the current set of results.

`[[#DocNumEnd]]`- This tag is replaced with the upper result range number for the current set of results.

[[#DocNumCount]]- This tag is replaced with the total count of records for the current set of results.

[[#LINKPREVIOUS]]- This is replaced with a link to the prior set of results based on the current range of results. If the current set of results is the first set, then the link is made inactive (not a link).

[[#LINKNEXT]]- This is replaced with a link to the next set of results based on the current range of results. If the current set of results is the last set, then the link is made inactive (not a link).

DSSDoSearchHeaderPP_???.htm- This HTML template is the search result table's caption and defines the columns and captions for those columns defined for the Search Results Page. The number of columns used in the row of column captions should match the number of columns in the data section of the search result in the DSSDoSearchPP_???.htm HTML template.

DSSDoSearchPP_???.htm- This HTML template is actually one table row that is filled with the actual result data. This row is repeated for every row of data returned in the search. The number of columns used in this table row should match the row used for column captions as defined in the DSSDoSearchHeaderPP_???.htm HTML template.

Tags:

[[#DOC_ID]]- This fills in with the current record's DOCMAIN.DOC_ID. This is an important tag because the DOC_ID is needed to create thumbnails, links to view, save, or download the document as a PDF. Please read more about creating these types of links in the [Docs2Web Interface for Requesting Images or Files](#) section in this help file.

[[#DATEOFDOC]]- This fills in with the current record's DOCMAIN.DATEOFDOC date field.

[[#DATEENTERED]]- This fills in with the current record's DOCMAIN.DATEENTERED date field.

[[#DOCSOURCE]]- This fills in with the current record's DOCMAIN.DOCENTITY field.

[[#DOCENTITY]]- Same as above.

[[#DOCFOLDER]]- Same as above.

[[#DOCTYPE]]- Same as above.

[[#IMPORTANCE]]- Same as above.

[[#DOCREF]]- Same as above.

[[#NOTES]]- Same as above.

[[#DOCGROUP_ID]]- Same as above.

[[#DOCTREENODE_ID]]- Same as above.

[[#FOLDERNAMESHORT]]- This is filled in the folder name the document is in from the Document Explorer in Docs2Manage. NOTE: Docs2Web must query the database to retrieve the folder name for every record in the results. This may slow performance slightly.

[[#FOLDERNAMELONG]]- This is filled with the entire path to the folder the document is in from the Document Explorer in Docs2Manage. NOTE: Docs2Web must recursively query the database to retrieve the entire folder path for every record in the results. This may slow performance.

[[#FOLDERNAMELONGCR]]- This is just like the [[#FOLDERNAMELONG]] tag, but includes a line break after every folder name, so the path is displayed on multiple lines.

[[#GROUPNAME]]- This is filled in the group name the document is in from. NOTE: Docs2Web must query the database to retrieve the group name for every record in the results. This may slow performance slightly. If Docs2Web is configured to not [Search All Group at Once](#), the results will all be from the same group. The group name can be displayed by either modifying the HTML templates that belong to that group to display the group name or use the [[CurrentGroupName]] global tag, which only queries the database once per page.

DSSDocPagesHeaderPP_???.htm- This HTML template is the Document Pages Page table's caption and defines the columns and captions for those columns defined for the Document Pages Page. The number of columns used in the row of column captions should match the number of columns in the data section of the Document Pages Page in the DSSDocPagesPP_???.htm, DSSDocPagesFilesPP_???.htm, and DSSDocPagesOLEPP_???.htm HTML templates.

DSSDocPagesPP_???.htm (for images)- This HTML template is actually one table row that fills

in actual results data when the page record is image-based. Docs2Web splits up different type document page records because image rows are capable of displaying thumbnails, which is not possible for stored files or OLE documents (Windows Documents). This row is repeated for every page record for the selected document. The number of columns used in this table row should match the row used for column captions as defined in the DSSDocPagesHeaderPP_???.htm HTML template.

Tags:

[[#DOC_ID]]- This tag fills in with the current page record's DOCPIC.DOC_ID. This is an important tag, along with [[#DOCNUM]], because the DOC_ID (and DOCNUM) is needed to create page thumbnails, links to view, save, or download. Please read more about creating these types of links in the [Docs2Web Interface for Requesting Images or Files](#) section of this help file.

[[#DOCNUM]]- This tag is very similar to [[#DOC_ID]], but is against the DOCPIC.DOCNUM field. This field is also very useful in creating page specific links or thumbnails. This tag can also be used a page number in the data grid.

[[#SRCFILENAME]]- This tag fills in with data from DOCPIC.SRCFILENAME, which can let the user see which type of file or image that specific page is.

[[#DOCNAME]]-This tag fills in with data from DOCPIC.DOCNAME.

[[#DOCNOTES]]-This tag fills in with data from DOCPIC.DOCNOTES.

DSSDocPagesFilesPP_???.htm (for files)- This HTML template is actually one table row that fills in actual results data when the page record is based on a file. This type of record cannot have a dynamic thumbnail like an image page record. However, unlike the OLE format listed in the DSSDocPagesOLEPP_???.htm HTML template, it does allow a link for the viewing of a file embedded in a standard browser as long as the computer which attempt to view the document has the proper software to open files like MS Word, MS Excel, Adobe Acrobat, or AutoCAD files.

DSSDocPagesOLEPP_???.htm (OLE)- This HTML template is actually one table row that fills in actual results data when the page record is based on Windows OLE format. This type of record cannot have a dynamic thumbnail like an image page record and can only be downloaded and not viewed in a browser like files. This format depends that the user must have an OLE Viewer, which can be downloaded freely from the [Docs2Manage website](#).

DSSImageInHTMLPP.htm- This HTML template is actually a complete HTML page known as the Document Image Page used for viewing images in a majority of browsers with a viewable image, wrapped in HTML so other important information can be stated with the image.

Tags:

[[#ReqWidth]]- This is the requested width based on the "ReqWidth" parameter when the image was requested. This is explained more in the [Docs2Web Interface for Requesting Images or Files](#) section in this help file.

[[#NewWidth]]- This is the width of the image being returned from Docs2Web. If this tag or the [[#NewHeight]], [[#OrigWidth]], or [[#OrigHeight]] tags are used in the DSSImageInHTML.htm HTML template, then Docs2Web must query the image record twice; once to retrieve the image information needed to fill the tags and another to actually return the image. Because of this, use of any one of these tags can slow performance down. If this information is not needed, do not use any of those 4 tags.

[[#NewHeight]]- This is the height of the image being returned from Docs2Web.

[[#OrigWidth]]- This is the width of the image in the Docs2Manage database regardless of the image being returned.

[[#OrigHeight]]- This is the height of the image in the Docs2Manage database regardless of the image being returned.

[[#DOC_ID]]- This fills in with the current record's DOCMAIN.DOC_ID.

[[#DATEOFDOC]]- This fills in with the current record's DOCMAIN.DATEOFDOC date field.

[[#DATEENTERED]]- This fills in with the current record's DOCMAIN.DATEENTERED date field.

[[#DOCSOURCE]]- This fills in with the current record's DOCMAIN.DOCENTITY field.

[[#DOCENTITY]]- Same as above.

[[#DOCFOLDER]]- Same as above.

[[#DOCTYPE]]- Same as above.
[[#IMPORTANCE]]- Same as above.
[[#DOCREF]]- Same as above.
[[#NOTES]]- Same as above.
[[#DOCGROUP_ID]]- Same as above.
[[#DOCTREENODE_ID]]- Same as above.
[[#FOLDERNAMESHORT]]- This is filled in the folder name the document is in from the Document Explorer in Docs2Manage. NOTE: Docs2Web must query the database to retrieve the folder name for every record in the results. This may slow performance slightly.
[[#FOLDERNAMELONG]]- This is filled with the entire path to the folder the document is in from the Document Explorer in Docs2Manage. NOTE: Docs2Web must recursively query the database several times to retrieve the entire folder path. This may slow performance.
[[#FOLDERNAMELONGCR]]- This is just like the [[#FOLDERNAMELONG]] tag, but include a line break after every folder name, so the path is displayed on multiple lines.
[[#GROUPNAME]]- This is filled in the group name the document is in from. NOTE: Docs2Web must query the database to retrieve the group name. This may slow performance slightly. If Docs2Web is configured to not [Search All Group at Once](#) then the results will all be from the same group.
[[#DOCNUM]]- This tag is very similar to [[#DOC_ID]], but is against the DOCPIC.DOCNUM field, which is considered to be the page number.
[[#SRCFILENAME]]- This tag fills in with data from DOCPIC.SRCFILENAME, which can let the user see which type of file or image that specific page is.
[[#DOCNAME]]-This tag fills in with data from DOCPIC.DOCNAME.
[[#DOCNOTES]]-This tag fills in with data from DOCPIC.DOCNOTES.

Docs2Web Interface for Requesting Images or Files

Documents can be accessed either as an image or a PDF document. This section will explain how to control the size, format, and whether the document is a view or download request.

Security Control

Any request for an image or PDF will respect the group security. Any call that either request for an image or PDF from another group the user does not belong to or is not logged into currently shall be treating as if the image does not exists.

Requesting an Image (/dssshowdoc)

Docs2Web has one interface for requesting an image whether you are requesting a full-size document for download, resized to fit a screen, or image thumbnails. An image is called by sending the path /dssshowdocs. An example of this call would be:

```
http://192.168.1.100/d2w-cgi-bin/D2W.dll/dssshowdoc?DOC_ID=30&Page=1&ReqWidth=800&InHTML=True
```

The section of the link after the "?" are called the parameters, which are all case sensitive. Some of these parameters are required and some are not.

Required Parameters

DOC_ID- This commands which document the image will come from.

Page or DOCNUM- This commands which page or DOCNUM the image will come with respect to the DOC_ID passed. If you are creating thumbnails, use 0 (zero) for this field; this will tell Docs2Web to retrieve the first image page available.

Optional Parameters

ReqWidth (Integer)- This causes Docs2Web to resize the image if it is larger then the requested width. The resize is always done proportionately.

ToDownload (True or False - Default False)- This parameter when "True" directs the web user's browser to download the file and usually brings up a "Save As" dialog. When a file is for

download, the RequestWidth parameter is ignored. The file is also downloaded in the format in which it is stored in the database. When this parameter is "False" or not used, Docs2Web returns the image to the browser for viewing.

InHTML (True or False - Default False)- When this parameter is "True" this directs Docs2Manage to return the image in an HTML page with the image inside the page. When this parameter is "False" or not used, Docs2Web assumes to return the image as an image content type. When the InHTML parameter is set to "True", the ToDownload parameter is ignored.

NOTE: Thumbnails, which are images resized to 300 pixels or less of width, are not consider a page view and are not logged even if [Log Page Views](#) is checked.

Requesting an PDF (/dssshowpdf)

Docs2Web has an interface for requesting PDF files (Adobe Acrobat Documents). This is called by sending the path /dssshowpdf. An example of this call would be:

http://192.168.1.100/d2w-cgi-bin/D2W.dll/dssshowpdf?DOC_ID=30&ToDownload=True

Required Parameters

DOC_ID- This commands which document the PDF will be built from. This assumes that the PDF will be built from all of the pages that are in image format in Docs2Web. Any non-image format documents will be skipped.

Optional Parameters

ToDownload (True or False - Default False)- This parameter when "True" directs the web user's browser to download the file and usually brings up a "Save As" dialog. When this parameter is "False" or not used, Docs2Web returns the PDF document to the browser for viewing. Some browsers may ignore whether the file is for download or not and always show the PDF document in the browser or in Adobe Acrobat or always show the "Save As" dialog.

NOTE: The "ToDownload" parameter controls which log event will be logged. If the "ToDownload" parameter is set to "True", then the event will be logged under the "CanSave" right, else it will be logged under the "CanViewDocPages" right.

User Experience

The website that Docs2Web produces should not require much explanation even for the novice web user, but there are some quick changes that can even make the experience easier and look more professional. Here are some tips to make the user experience better:

Make it Simple

Once all the HTML templates are in place for the entire Docs2Web website, eliminate unneeded fields in the Document Search Page, Search Results Page, and the Document Pages Page. In fact, consider using just a keyword search field only, which searches ALL text database fields at one time, in the search area even if there are multiple categorizing fields in Docs2Manage. This approach will make the search similar to a web search engine and simple. A link to a more advanced search page could be created if need be. Do not feel the need to be confined to the provided website map.

Customize the Look

Docs2Web uses very simple HTML formatting in all of the HTML templates to make it easier to edit or delete search or display fields in your Docs2Web website. The main reason the HTML templates are available is so that they can be customized to fit your organizations look. The HeaderStartPP.htm and HeaderPP_???.htm (group specific) can be modified to use Cascading Style Sheets (CSS) to give the website one uniform theme. Also, a title for the main login (HeaderStartPP.htm) and a title for each group (HeaderPP_???.htm) can be added. The FooterStartPP.htm and FooterStartPP_???.htm (group specific) allow for uniform text at the bottom of each page which could be used to display organization or contact information.

Sub-Domain Names and Website Start Page

Docs2Web allows use an IP Address or domain name as your Docs2Web website address. However, an IP Address can be difficult to remember. A good way around this is to purchase a domain name that people can remember or create a sub-domain of your current domain or website. For example, if your company's website address is www.abccompany.com, you could set up a sub-domain of abccompany.com called docs, so the Docs2Web website can be accessed via the address docs.abccompany.com. Another suggestion, make the start or default page on the web server for that website's domain or sub-domain set to a page that will forward the user to the complete link to the Docs2Web website automatically. This will mean that the people that use the website will only have to remember docs.abccompany.com rather than docs.abccompany.com/d2w-cgi-bin/D2W.dll/dsssearch.

It is important for the success of the Docs2Web website that it is both easy to access, looks appealing, and is easy to use.

Chapter 4 - Notes

Additional Notes

Docs2Web was developed by COMvantage Solutions. We do more than just build and sell our own software, we also provide consulting. We have done many successful projects from Client/Server applications to E-commerce web applications. Please visit the [Docs2Manage website](#) for more information or forward any request or questions to Docs2Manage support at support@docs2manage.com.

Credits

Docs2Web includes the freeware version of the Falcon Web Server by [Blueface Software Development Corporation](#) of Scandinavia. Please support Blueface Software by evaluating [all the software products](#) they produce.

OmniSecure (OmniHTTPd) web server trial edition is available from [Omnicon Technology Corporation](#) of Canada.

[Microsoft Windows](#), [Internet Information Server \(IIS\)](#), MS Excel, MS Word, [MS SQL Server 2000/2005](#), and [MS Access 97/2000/XP](#) are registered trademarks of the [Microsoft](#) Corporation.

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We also like to thank our customers, who suggest many of the features that go into Docs2Manage and Docs2Web.