

Contents

CardWeb version 1.30

New in this release is the introduction of "phrase search".
The ordinary example Contacts is now extended with a pick list (see 4.3)
Out soon: version 1.31 featuring the Non-Image File option

CONTENTS	1
1. INTRODUCTION	2
2. CONFIGURING	3
2.1 UNZIP THE CARDWEB DEMO.....	3
2.2.1 MAKE DATABASES ACCESSIBLE	3
2.2.2 CARDBOX SERVER SETTINGS	4
2.2.3 PREPARING FILE PROPERTIES	4
2.3 FIND OUT THE IP-ADDRESS	4
2.4.1 CONNECT CARDWEB & CARDBOX	4
2.4.2 PRESENTING A DATABASE	4
2.4.3 THE CARDWEB CACHE.....	5
2.5 FINALLY RUN CARDWEB	5
2.6 CHECKING THE STATUS PAGES.....	5
2.7 PASSWORD PROTECTION	5
3. IMPORTANT NOTES	6
3.1 LINUX: WHAT'S IN A NAME.....	6
3.2 WHAT CAN GO WRONG.....	6
3.3 TWO SERVERS ON ONE PC.....	6
3.4 HOW TO UPGRADE THE DEMO	6
3.5 HOW TO MIGRATE TO LINUX	6
4. ADD YOUR OWN DATABASE	7
4.1 STEP 1: MYBASE.FIL	7
4.2 STEP 2: MYBASE.HTML	7
4.3 STEP 3: CREATE A PICK LIST	7
5. MORE ON HTML	8
5.1 CREATING HELP PAGES	8
5.2 DISPLAYING IMAGES	8
5.3 SPECIAL CARDWEB TAGS.....	8
5.4 SHOWING HYPERLINKS.....	8
5.5 RECORDS PER PAGE.....	8
5.6 VALIDATING YOUR PAGES.....	9
6. AUTOMATION	9
7. CONNECTED TO THE WEB	9

1. Introduction

CardWeb (for Windows2000 & above or Linux !) is intended to give you an easy way to integrate Cardbox databases into your website. This special server is developed by IOTA offering you a straight forward way to give ReadOnly access to the content by a browser, so there is no need for the visitor to install any Cardbox software, just a link on your web.

The demo version comes with an ordinary (no javascript) example, a set of HTML-pages, based on the database "Contacts" as supplied with Cardbox. This database was used for all the screen shots in the version 2 manuals. As an extra it comes with a demonstration how to integrate a pick list (click on Advanced search and next on Pick business type). Please install the demo as described below to get things working and look into it's HTML-pages when you want to know more about CardWeb's current possibilities in a hands-on manner, thus avoiding to study the more technical information in the file README.

You can view several other examples on <http://www.cardweb.nl/databases.html> Next to the database "Contacts", this web page shows an enhanced example "Contacts3" where you can tag records (by writing cookies) and then retrieve all tagged records just like in Cardbox itself. In this enhanced example you can also set the number of records per page and like in the ordinary example there is a pick list. Again, click on the link Pick business type in Advanced search. Both examples work with the same CardWeb server, the enhanced implementation (to obtain separately) is only to show what JavaScript and HTML can do if you are willing to let your imagination flow.

We assume that you have installed a Cardbox Server (build 156 or later). If you want to try CardWeb not having R/O-users installed on your server, we can email you a temporary 5-user R/O signature for evaluating purposes.

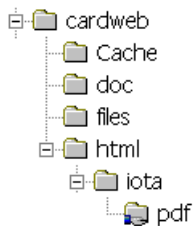
Please follow the instruction in this document **step by step**, a small amount of text was coloured red to draw your special attention **for many things can go wrong, see 3.2**. Following these steps you can tell us where you stranded and need assistance. In that case you might send us an email: <mailto:iota@iaf.nl> or call: 00-31-(0)53-4319783

Please keep always this in mind: if a Cardbox client can not connect to a database, all your efforts with CardWeb are useless.

2. Configuring

2.1 Unzip the CardWeb demo

Get the zip file from the internet at <http://www.cardweb.nl/cardwebdemo.zip>
Unzip this file with all of it's subdirectories, preferably into a directory called "cardweb" on the machine which also runs the Cardbox Server. You will find a directory lay-out which is the same for Windows and Linux:



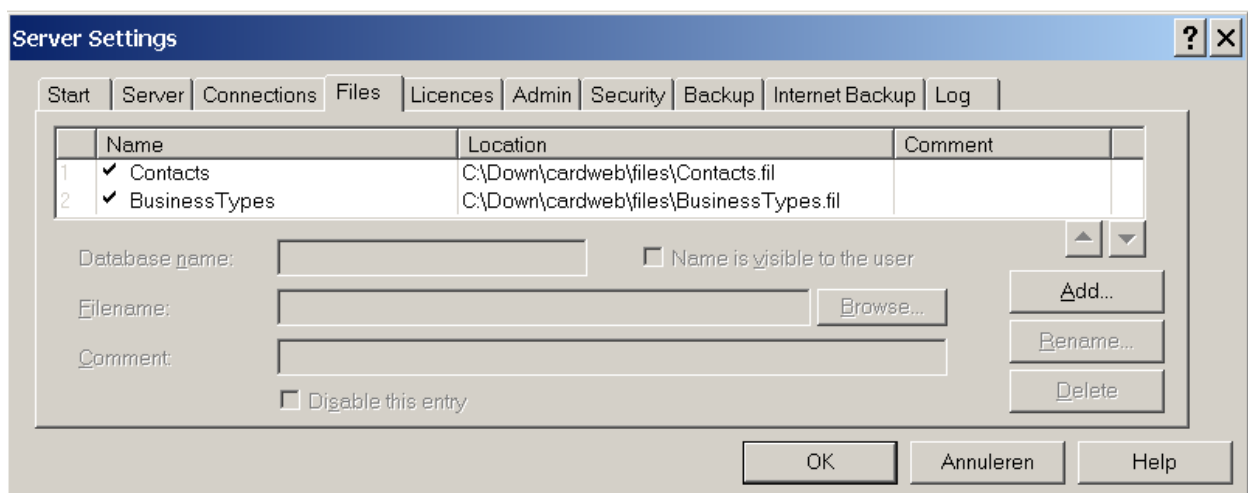
The names for the directories "Cache" and "html" are stored in "cardweb.ini" and the name of the directory "iota" is fixed in "welcome.html" which will list automatically all available databases as presented in "cardweb.ini". Shared pages in folder "html" are:

- "welcome.html"
- "status.html" which is useful to see how your visitors are querying the databases
- "licence.html" telling visitors that all licences are occupied at that moment
- "noauth.html" warning when entering a wrong password for protected folders
- "Help_EN" and "Help_NL" as an example of simple Help pages

The directory "files" contains the Cardbox database "Contacts" and "BusinessTypes". In the folder "iota" you will find the HTML-pages needed for querying the example.

2.2.1 Make databases accessible

Open the Cardbox Server Settings menu via the Windows Control panel, or open it by double-clicking on "cbox3cpl.cpl" in the Cardbox Server directory. Add the files "Contacts" & "BusinessTypes", enter the names and use the button Browse to search for the location. The location will appear in text box "Filename" and looks like this:



2.2.2 Cardbox Server Settings

- install at least one block of RO-users by way of the TAB "Licences"
we can send you a temporary signature for evaluation, see Introduction
- tick "Allow access by programs other than Cardbox" on the Security tab

2.2.3 Preparing file properties

If you plan to use a recent copy of the database for the CardWeb users and you did not create a full RO user profile (see below), you'll have to change the file properties for the database components .fil .fmt into Read-Only (RO). You can do so by right-clicking the files in Explorer, choose Properties and mark the attribute Read-Only (RO). You'll have to repeat this adjustment every time you are refreshing the database copy for CardWeb users and you'll have to reboot the CardWeb server as well, It is a bit cumbersome, but you can obtain an extra Cardbox server and set this server itself complete to RO. Even then you'll have to reboot after every refresh, thus avoiding any false cache data.

If you want to use the database shared by CardWeb and Cardbox users, you need to create a full RO profile for that database. Do not give the profile a password, just click the OK button and mark the profile as "Default profile for this database". Please check the RO status with a browser (see 2.6) because some new Cardbox3 features like spell check need to be turned into RO as well to recognise the database as fully RO. We have already adjusted the database Contacts in this way. There is no objection to have more than one profile without a password, as long as the default profile is linked to full RO access. In this way regular Cardbox Client users can switch to RW just by changing to such a profile without having to type a password. Another way to get around the annoyance of typing a password to get RW access is by a "Workspace remembered" password. See the Help in the Cardbox Client how to do so, search for: Workspaces > passwords.

2.3 Find out the IP-address

Open the Server Settings menu (2.2.1) and click the tab "Connections" to reveal the IP-address. Make a note of this address for later use in "cardweb.ini". (here: 192.168.1.12) Check if the Client can open "Contacts" using your IP-address to connect to the Server. If your computer is not connected to a local network or if you want to test all the software on one PC just use the IP-address 127.0.0.1 (an internal IP-address always available).

2.4.1 Connect CardWeb & Cardbox

Adjust the file "cardweb.ini". In the section [cardweb] you will find 2 lines like this:
; Which connections to cardbox servers should be established?
cardbox1=192.168.1.12

Change our IP-address in the IP-address you just found in 2.3 or use 127.0.0.1 instead.

2.4.2 Presenting a database

In file "cardweb.ini" you will find in the section [cardbox1] a line: "Contacts= Ordinary example" for the sample database. Here you'll have to add your own databases but be aware of case sensitivity. (See 3.1 about case sensitivity and 4.1 about Mybase.fil)

2.4.3 The CardWeb Cache

If you plan to use an actual database (not a copy), you may wish to show new records or changes in existing records fairly soon. Cache ages for the demo were set to 24 hours in "cardweb.ini" (24 hours=86400 seconds) and maybe you prefer smaller values. In that case you can adjust the appropriate lines in the section [cardbox1] where settings for the "cache refreshment age" are fixed. When less urgent, a script rebooting the CardWeb server every 24 hours will do best (see also 6). **Note: your browser has a cache as well.**

2.5 Finally run CardWeb

While the Cardbox Server is already running, open a DOS-box in the directory "cardweb" and run the program "cardweb.exe" or use the option "Run" in the Start menu to do so. Next enter the correct IP-address with prefix http:// in the browser. In our example this would be: http://192.168.1.12 the IP-address that belongs to the machine that runs both servers. If everything is OK the page "welcome" should popup, enabling you to choose the "Contacts" database. **Be sure that the folder "Cache" has RW properties.**

NOTE: if you have only one database, you might want to skip this initial "welcome". If so, then make a shortcut on the Home page like http://192.168.1.12/iota/Mybase.html Or you can rename "welcome.html" into "Mybase.html" and move all necessary HTML-files from folder "iota" to folder "html", But if you expect to add other databases in the next future, you'll get into a mess, so this renaming is not a great idea.

Once you've started CardWeb under Windows a DOS-box will stay open, indicating that CardWeb is running. In this box you can use ^C or CTRL+break to stop the CardWeb server. You can also add some startup parameters, see the section COMMANDLINE in the file README (see section 6 for information on running CardWeb as service).

2.6 Checking the Status pages

These pages will show you information about both the servers. In our example enter for CardWeb http://192.168.1.12/status.html showing who's connected and which queries were made. For the Cardbox Server enter http://192.168.1.12:3105/status.htm and look at the bottom lines showing something like:

Read-only user licences: 5 (3 in use).
Professional licences: 3 (0 in use).

We may ask you to load these pages for detecting possible problems.

Note: you need to be a regular user to check this, a power user will always claim a Professional licence no matter the way the database is protected by RO profiles

If you see the button for recording macros, you are a power user. Scale down to regular user with csetup.exe by turning off "Borrow a licence from a server" on TAB "Loan".

2.7 Password protection

You can protect subdirectories with a password. See the file README for details and the file cardweb.ini for some ";locked out IP" examples. CardWeb comes with a file called DOT.ACCESS in folder "html". Current values: user=Egbert password=iota2004 To make changes, edit this file DOT.ACCESS with Wordpad, save it as ".access" and move it into the directory you want to protect with a password.

3. Important notes

3.1 Linux: what's in a name

Linux is the Operating system that we are using to develop CardWeb and when tested, we compile a Windows version. It is important to know that Linux makes a difference between Upper & Lower case. Therefore it is useful to adopt a consistent way of spelling file names when setting up Cardbox & CardWeb. Names given via the Server settings are names that the Cardbox Server is using for the outer world thus also for CardWeb.

When the outer world name is **Contacts** then use **Contacts** and **Contacts.html** for CardWeb. If it is **My pictures** then use **My pictures** and **My pictures.html** and so on to prevent cumbersome detecting in what's going wrong.

3.2 What can go wrong...

- **do not** use Explorer to start CardWeb
- **do not** forget to reboot CardWeb after uploading a fresh database copy.
- **do not** forget to reboot CardWeb after rebuilding a database.
- **do not** remove the main directory "Cache"
- **do not** forget to install a 5 RO user block on the Cardbox server
- **do not** forget to tick "Allow access by programs other than Cardbox" (see 2.2.2)
- **do not** use Upper & Lower case in names arbitrary, even under Windows (see 3.1)

3.3 Two servers on one PC

Do not let IIS or any other internet server block port 80 belonging to the IP-address you planned to use for the CardWeb internet server. You can fix the IP-address (and port) where CardWeb will listen to in "cardweb.ini" and make sure that IIS is only listening to it's own IP-address.

An alternative is that you use another port (like 8080) for CardWeb and open "welcome.html" by entering `http://192.168.1.12:8080` in your browser.

3.4 How to upgrade the demo

Later, if you decide to go on with CardWeb, you can easily upgrade the demo into a full version by putting a "key" in cardweb.ini, The demo will show only the first 5 records.

3.5 How to migrate to Linux

You can also evaluate the Linux version, just move the whole of the directories to Linux server and ask us for a Linux executable to replace the one for Windows. Review the changes that were made to the file "server.ini" using the Windows menu for Server Settings (see 2.2.1). Next transfer these extra lines to the file server.ini you're preparing for Linux. You can only do it by hand, Cardbox for Linux has no menu to enter the data.

4. Add your own database

4.1 Step 1: Mybase.fil

- Copy your own database let's say "Mybase" into the subdirectory "files".
- Make the database "Mybase" in this directory accessible for the server (see 2.2.1)
- Open "cardweb.ini" and go to the section [cardbox1] and look for these 3 lines:

```
; below you will find the databases we expect to be on this cardbox
; server and a forced description for them
Contacts=Ordinary example for database Contacts [*]
```

- Insert an extra line for "Mybase" to get your database automatically listed in page "welcome.html". It will be something like: Mybase=Description for mybase [*]
- Next save the file and remember you have to restart CardWeb to activate it.

4.2 Step 2: Mybase.html

The HTML-pages for the databases "Contacts" & "BusinessTypes" coming with the demo are ordinary, no special thrills. As an extra option you can buy (euro 350) the set of files that make up the enhanced example "Contacts3" including the necessary javascript to introduce a more enhanced topic: cookies for tagging records. (see the Introduction). Basic understanding of Javascript is necessary if you plan to adjust these pages, we do not support your experiments with javascript !

Using a HTML-editor, you'll have to make some necessary changes to use the original pages for your own purpose "Mybase":

- first open the file "Contacts.html" and next save it as "Mybase.html".
- specify the filename, so <search db="Contacts"> becomes <search db="Mybase">
- replace field names used for "Contacts" by field names taken from "Mybase"
- please note the curious field name [-2] which used by Cardbox to search "All fields"
- make the same kind of changes in the other HTML-files belonging to "Contacts".

4.3 Step 3: create a pick list

Normally you would create a list of single keywords by pressing the button Save in the dialog box "Index Preview" and use that file as CSV import for a pick list database. This database is maintained separately and has a record for each keyword. It can also hold other information like a scope note or fields for "see" & "see also". In our case we took the content of field Business (BU) to create "BusinessTypes". As an occupation can be compound like "Estate Agent", it is also an excellent way to present Phrase search.

5. More on Html

5.1 Creating HELP pages

The ordinary example Contacts comes with a short page for Help, located in the folder "html" and a full Help reference in the folder "doc" both in English and Dutch. Please create your own Help page for every database you want to publish by way of CardWeb.

5.2 Displaying images

The "Contacts" database has one extra record with an image in the field "IMAGE" see record 1001, using the "pict" tag for display: `<pict name="IMAGE" width="64">`

5.3 Special CardWeb Tags

In 5.2 we saw a tag called "pict" necessary to display an image with CardWeb. Another important field-tag attribute is 'name' to display the content of a text field. Here we mention only attributes mattering the appearance & presentation in HTML:

highlightterm	indexterm	order	underscores
showas	maxchar	maxline	

Please see the section TAGS in the file README for more information.

5.4 Showing hyperlinks

You can store the filename in a field and make it clickable by using the tag "showas=". With this attribute you can display links, see section Layout-attributes in README. You can store PDF files in the directory "iota" but that would soon end up in a mess. It is better to make separate folders for each kind of file you want to link. In the demo we've made a subdirectory "pdf" to store PDF files. A separate CardWeb folder for files that are linked, is at the same time a save way to stop intruders. To get things working, enter the filename in the field, preceded by "pdf/". See 2 examples with possible links: retrieve records 1001 and 1002 by using our company name IOTA as query.

If necessary (but it's not IOTA's advice) you can store files elsewhere. If your files are on the computer named "win2k" (here at IP 192.168.1.14) rather than on 192.168.1.12 you should enter into the field: `file://win2k/pdf/myfile.pdf` and share the folder "win2k/pdf". The "file:" statement used here is quite dangerous (a virus could be launched) and it's therefore not supported by browsers like Opera and Firefox but works fine with IE.

5.5 Records per page

Displaying 10 records per page is the default on the internet but that's easy to change. If you look at the HTML-page "Contacts.html" you will find a piece of code:

```
<input type="hidden" name="pg" value="q" />
```

To display 20 items, change it into: `<input type="hidden" name="display" value="20" />`

See also the enhanced "Contacts3" where you can set "Records per page" on the fly.

5.6 Validating your pages

It always makes sense to improve your HTML-pages and to test them if they work well with any other browser. You can do so at <http://validator.w3.org>
It's necessary that you first execute a query and then test the resulting page.

6. Automation

If you run NT4 or higher, you can run the Cardbox Server as a system service. See the tab "Start" in the Server Settings menu (see also 2.2.1)

For programs like CardWeb, Microsoft offers SRVANY in the Resource Kit Tools. Please go to Microsoft's English Knowledge Base to find out more: <http://support.microsoft.com/kb/137890/> ("How to create a user-defined service"). Using SRVANY is OK if you are not afraid to edit the registry. It's not truly reliable, and under certain conditions SRVANY may stop the service as you "Log off" and you'll have to use "Lock computer" instead to run the service unattended.

There are more sophisticated cheap commercial products like "AlwaysUp" and "FireDaemon". Both are easy to install and monitor a service all the time. They will restart the service when detecting that the service is no longer running and can perform also a cache refreshing reboot at midnight or so. 30-day trial versions at:

<http://www.coretechnologies.com/products/AlwaysUp/>

<http://www.firedaemon.com/>

An additional note on SRVANY: the registry needs a specification for the working directory by a value called the 'AppDirectory', necessary for CardWeb for Windows to locate the (redhat) file cygwin1.dll.

7. Connected to the Web

Most of our customers use CardWeb for their own internal intranet. When connected to the Web you'll have to check the CardWeb status page (section 2.6) to see how many visitors are connected (and what queries were made).

Sooner or later regular users might encounter the "Out of licence" page because search engines are visiting your site to heavily. You can block these engines by denying access through the section [accesslist] in cardweb.ini with statements like:

```
65.55.=D  
207.46.=D
```

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*CardWeb - IOTA