



Alchemy Web

Release 4.1 Administrator Guide



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WHAT THIS CHAPTER COVERS

This chapter gives you important information you should review before using Alchemy Web. It contains the following sections:

- Welcome to Alchemy® Web
- About this guide
- What this guide assumes
- Documentation conventions
- Contacting Captaris
- Annual Maintenance Program
- Supported hardware

1.1 WELCOME TO ALCHEMY® WEB

Alchemy Web, an extension for the Alchemy Content Management Suite (ACMS) and Alchemy Pro, provides instant and secure access from anywhere in the world to the documents that are safely stored in your Alchemy databases. Using the Internet, your users can search for, view, retrieve and even add documents as quickly and easily as if they were in the home office.

Alchemy Web's simple and intuitive browser helps you find the documents you are looking for fast. Using Alchemy Web, you can search for documents by words or phrases within the document, or search by profile fields such as file type, file name, date created or custom data fields. You can also search for documents using folder profiles and text annotations. And your search results are displayed quickly in easy to read list format.

You can also use Alchemy Web to browse through folders to find what you're looking for. Alchemy Web handles hundreds of file types, retrieving and displaying each in its native format. A powerful viewer for images, PDF and COLD formats is included, or you can choose to convert documents to HTML or GIFs at the server, so no special viewer is required.

Alchemy Web also allows you to add documents to a centralized database from your browser. You can then index and quickly and securely upload the documents to your preferred database where they are immediately accessible to your users.

Alchemy Web makes it easy to use the internet to get your customers and partners the documents they need without help from your staff and your remote employees can be far more productive. When combined with the robust security functions in the Alchemy document management system, your users will see only what you want them to see. And best of all, Alchemy Web is easy to learn and simple to use, which means that your users will be productive with little or no training.

1.2 ABOUT THIS GUIDE

This guide contains information about configuring, administering and using Alchemy Web to access documents in your databases over the internet.

1.3 WHAT THIS GUIDE ASSUMES

This guide assumes that you are familiar with the following concepts and procedures:

- The Microsoft operating system environment for both client-and-server-based operating systems.
- Windows-based HTML and WinHelp help systems.
- The ability to install and operate supported storage and scanning devices.
- The administration and operation of Microsoft SQL Server and Microsoft SQL Server databases.

1.4 DOCUMENTATION CONVENTIONS

THIS MANUAL USES THE FOLLOWING CONVENTIONS:

Menu and dialog box options, including buttons, appear in **bold** as depicted in the application. Instructions and descriptions for the options are formatted in regular text. For example:

Name - Type the name of the user, or user ID, in this box. For example, an administrator might just type “admin” in this field.

Consecutive menu selections are formatted in bold and are separated by the pipe symbol. For example, **File | Print** means you should click on the **File** option on the menu bar, and then select **Print** from the drop-down menu.

File names and extensions appear in bold, e.g., **alchemy.ini**, or “the **INI** file.”

Key-strokes, i.e., the instruction to press a specific key on the keyboard, appear as follows: **ALT**, which represents the “Alt” key on the keyboard. If you need to press two or more keys simultaneously, the keys are connected with a plus sign (+). For example:

Press **ALT+F4** to close the window.

NOTES, TIPS AND CAUTIONS APPEAR USING THE FOLLOWING FORMAT:

This is a Note:



This is a note. Notes are used for clarifications, or in special cases, to qualify important points.

This is a Tip:



This is a tip. Tips are used for positive suggestions that help users apply information described in the documentation to meet their specific needs.

This is a Caution:



This is a caution message. Cautions use negative alerts that inform software users and administrators that a particular action can result in data loss, data corruption, security problems, or performance problems.

1.5 CONTACTING CAPTARIS

This section provides you with information for contacting Captaris about issues and services related to your purchase of Captaris Alchemy products. Please feel free to contact the following departments with any questions, issues or suggestions you may have related to your Captaris Alchemy product:

- Englewood office
- Educational services
- Technical support
- Professional services
- Sales
- Documentation feedback

1.5.1 ENGLEWOOD OFFICE

The offices for Captaris Alchemy are located in Englewood, Colorado, USA. For over 10 years, Captaris Alchemy has been the document management software that people love to use. In fact, we have more than 10,000 delighted customers in over 40 countries. Our software is installed in organizations of all sizes and across every industry. Our customers benefit from immediate cost savings and long-term peace of mind.

Captaris Alchemy provides the foundation for software solutions that give people the tools they need to manage the finished documents they must keep. This is especially vital for any organization that must:

- comply with government regulations for records keeping.
- support vital business processes with archived documents, such as customer service, accounting, human resources, project management, records management and more.

We're really good at helping the world get control of the paper document problem. And our people are absolutely the best at creating solutions to retrieve your archived documents quickly, easily and inexpensively!

How can we help you?

Englewood office

Captaris, Inc.
6025 South Quebec Street, Suite 260
Englewood, CO 80111 USA
Tel: 1-303-689-0022
Fax: 1-303-689-0055
E-mail: deninfo@captaris.com
Web site: www.captaris.com

International Sales Office

Gabriel Weitzner
Vice President of International
E-mail: gweitzner@imrgold.com
Tel: 1-905-820-8820

Asia-Pacific Sales and Support Offices

Paul Molloy
Regional Sales Manager, Asia Pacific
E-mail: Paulm@imrgold.com
Tel: +64 9 476 5200

Postal Address:

Captaris, Inc.
P O Box 35 590
Browns Bay, Auckland
NEW ZEALAND

Wendy Dunn
E-mail: wendyd@newzealand.imrgold.com
Tel: +64 9 415 9913
Fax: +64 9 415 0450

Postal Address:

Captaris
Unit A6
396 Rosedale Road
Albany
North Shore City 1309
Auckland
New Zealand

For more information, visit the “About US” area of the Captaris Web site or call 1-303-689-0022.

1.5.2 EDUCATIONAL SERVICES

Wouldn't it be wise to invest in a few days of training for a solution you will be using so extensively? Learn more about our Software products from Captaris Alchemy Certified Instructors at our Englewood, Colorado office, or at your facility. Our course offerings focus on individualized skill sets and are an excellent source for maximizing your productivity.

Educational Services Guarantee

Captaris Alchemy Certified Instructors inspire innovative solutions focused on helping you exceed expectations and achieve maximum productivity with entire Captaris Alchemy feature set. If you feel you did not gain a thorough understanding of the curriculum while attending one of our courses, you may attend the same course again, tuition free, during the 6 month period following your first attendance. This is on a space available basis to scheduled courses and does not include travel, expenses or books. Simply call 15 days prior to a class to check availability and bring your original books.

For information regarding our software product training program, courses, and schedules, please call, e-mail, or visit us online.

Educational Services

Tel: 1-303-689-0022

E-mail: Alchemy Training Registration

Web site: www.imrgold.com/Support/Training/index.asp

1.5.3 TECHNICAL SUPPORT

Product technical support is always available to customers who have purchased an Annual Maintenance Program (AMP). Customers without AMP can receive support on an as-needed basis at a rate of \$200 per hour (with 1 hr. minimum and billed in 15 minutes increments thereafter, credit card required).

Product support in the USA

Tel: 1-520-320-7070

E-Mail: imrsupport@captaris.com

Our hours are 6 A.M. to 6 P.M. mountain time.

Product support in Asia Pacific countries except Japan

Asia-Pac Technical Support:

Tel: +64 09 415 9913

E-mail: Asia Pacific Technical Support

Europe, Middle East, Africa, Canada, Latin America, Japan

End user support services are provided locally by the reseller.

Reseller support services are provided locally by your distributor or master VAR.

Please do not contact Captaris Alchemy USA Support.

Please provide the following information with your technical support question to ensure optimum speed and efficiency:

- Your contact information:
 - Name
 - Company name
 - Mailing address
 - Telephone number
 - Fax number
 - Email address
 - Product name
- Product release and build number

- For core Captaris Alchemy® applications, this is listed under Help | About (**Product Name**) on the main menu
- For Captaris Alchemy Standard or Advanced Server, listed on the License tab on the Alchemy Server Properties dialog box
- For the Captaris Alchemy Web Engine, listed on the Properties page in the Major and Minor License numbers
- Product serial number
 - For Alchemy Content Management Suite (ACMS), Alchemy Web, Records Care, and Compliance products, serial numbers are listed under the Server tab of the Alchemy License Manager module
- Operating system
- Scanner make and model number (if applicable)
- CD-R, CD-RW, MO, Zip or Jaz drive - make and model number (if applicable)
- SCSI card - make and model (if applicable)
- Description of problem (what steps led up to the error message?)
- Any error messages
- Does the database span CDs?

1.5.4 PROFESSIONAL SERVICES

Captaris, Inc. offers a wide variety of professional services. We work closely with over 300 Service Bureaus and 2500 end user companies worldwide. Our Professional Services Group has a thorough understanding of what it takes to implement the "Alchemy" document management solution. These processes include imaging, archival, retrieval, database management, network access and hardware setup. In today's world, quick and accurate access to important information is critical to a company's success. Implementing a data archival solution can be time consuming and full of setbacks if not done correctly. The Captaris Alchemy Professional Services Group can help you bypass the challenges associated with designing, implementing and maintaining a data archival and document management solution.

Consultation will include:

- New business implementation
- Initial needs analysis
- Detailed estimate prior to consultation
- Workflow analysis (including scanning, OCR, building and searching)
- Hardware recommendations, setup and configuration (Recorders, Jukeboxes, scanners, SCSI cards)
- Creation and implementation of databases and DataGrabber definition files
- Creation and implementation of command line interface
- Optimization of all Alchemy build and search processes
- Database customization
- Creation of Alchemy "ini" files including Path statements for network/jukebox access
- Installation and configuration of Jukebox management application(s)
- Detailed post consultation and workflow report

- Image-enabling relational databases on UNIX, AS-400, etc. by linking the images via API

Please contact us for more information about Captaris Alchemy Professional Services.

Tel: 1-303-224-7650

Fax: 1-303-689-0055

E-mail: DEN-ProfessionalServices@captaris.com

1.5.5 SALES

The Captaris Alchemy professional sales staff is ready to answer your sales questions Monday to Friday from 8:00 A.M. to 5:00 P.M. mountain time.

Contact your account representative for information about the latest Captaris Alchemy products, the Captaris Alchemy Annual Maintenance Program (AMP), upgrade options and prices, and more. If you have a technical question or problem, please contact Technical Support.

Contact your Captaris Alchemy sales representative:

Tel: 1-303-689-0022

Fax: 1-303-689-0055

E-mail: densales@captaris.com

Web site: www.captaris.com

1.5.6 DOCUMENTATION FEEDBACK

At Captaris, we strive to produce the highest quality documentation products and welcome your feedback. If you have comments or suggestions about our Alchemy online Help or PDF guides, you can email us.

Please include the following information with your feedback:

- Product name and version number
- Name of PDF manual or online help
- Topic title (for online help)
- Page number (for PDF manual)
- Brief description of content (for example, are you reviewing step-by-step instructions that are inaccurate, grammatical errors in a specific paragraph, information that requires clarification or more details, etc.)
- Your suggestion for how to correct/improve documentation

Please send e-mail messages to the Alchemy Documentation Group.

Keep in mind, this email address is only for documentation feedback; you will not receive a reply. If you have a technical question, please contact Technical Support.

1.6 ANNUAL MAINTENANCE PROGRAM

Captaris offers free technical support for the first 30 days for Captaris Alchemy products, starting when you register the product with Captaris or call us for the first time. Before your complimentary support period expires, call Sales at 1-303-689-0022 or your authorized reseller to subscribe to an Annual Maintenance Program (AMP).

The AMP is an annual, renewable program that entitles the user to technical support via phone, FAX, e-mail, the Internet and FTP. Support is offered Monday to Friday, from 6 A.M. to 6 P.M. Mountain time. In addition to technical support, the AMP provides all maintenance releases, and all new releases and upgrades of the product or module purchased, for a 12-month period.

Technical support is offered for the currently shipping release as well as for the two (2) previous releases. International technical support is provided by a Captaris Partner in each country and hours of support will vary.



When you upgrade your product license, you must also upgrade your Annual Maintenance Program.

1.7 SUPPORTED HARDWARE

For the latest information about the hardware that this release supports, contact Technical Support at 303-224-7650 or imrsupport@captaris.com, or visit the Captaris Web site.

CONFIGURING ALCHEMY WEB

WHAT THIS CHAPTER COVERS

This chapter gives you the information you need in order to configure your Alchemy Web installation. It describes how to configure the Alchemy Web Engine and the Alchemy Web Application in order to control how your users access documents and images contained in your remote Alchemy databases over the Internet. The chapter includes the following sections:

- Configuring the Alchemy Web Engine
- Configuring the Alchemy Web Application



If you use antivirus software on any of the computers that will run Alchemy Web components, make sure that your antivirus software does not change any Alchemy web files, for example, web.config, etc.

2.1 CONFIGURING THE ALCHEMY WEB ENGINE

You use the Alchemy Web Engine console to start and stop the Alchemy Web Engine service and configure the Alchemy Web Engine properties.



After you install the Alchemy Web Engine, you can either use the default settings, or you can modify the default settings to meet your personal business requirements. Even if you do not modify your Alchemy Web Engine configuration, you must still set up the Alchemy Server computer that you want to use to manage databases in the Alchemy Web Engine console.



The Alchemy Web Engine consists of two services: the Alchemy Web LM (LicenseManager) Service and the Alchemy Web PM (PoolManager) Service. When you start Alchemy Web Engine from the Services window, you need to start both of these services. You also need to ensure that the Alchemy Server service is running in order for Alchemy Web Engine to function properly.

QUICK STEPS

When you initially configure the Alchemy Web Engine, you need to complete the following tasks:

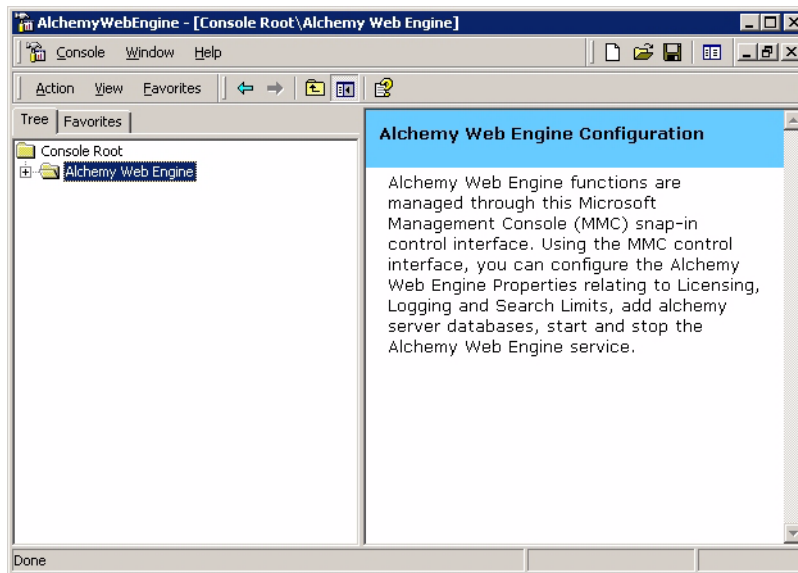
1. Add an Alchemy Web Engine computer to your Alchemy Web Engine console.
2. Add an Alchemy Server computer to your Alchemy Web Engine console.
3. Enable the databases controlled by the Alchemy Server computer you added to your Alchemy Web Engine console.
4. Start the Alchemy Web Engine.
5. Configure the Alchemy Web Engine administrative settings.

2.1.1 ADDING AN ALCHEMY WEB ENGINE COMPUTER TO YOUR ALCHEMY WEB ENGINE CONSOLE

Before you can use the Alchemy Web Engine you must add an Alchemy Web Engine computer to the Alchemy Web Engine console.

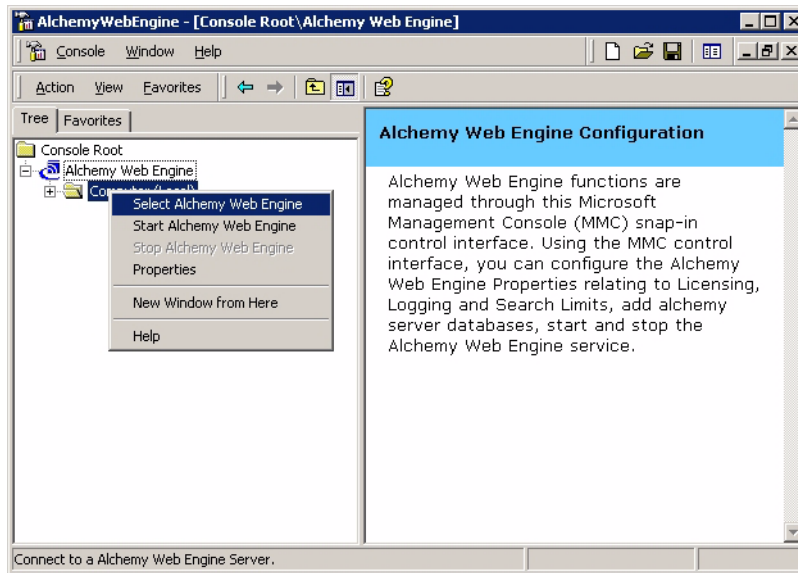
To add an Alchemy Web Engine computer to your Alchemy Web Engine console:

1. From the Programs menu, select **Alchemy | Web Engine Configuration**.
The Alchemy Web Engine console appears.



Alchemy Web Engine console

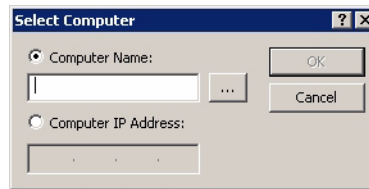
2. Expand the **Alchemy Web Engine** node.
3. Right-click the **Computer (Local)** node to display the shortcut menu.



Computer node selected

4. Click **Select Alchemy Web Engine**.

The Select Computer dialog box appears.



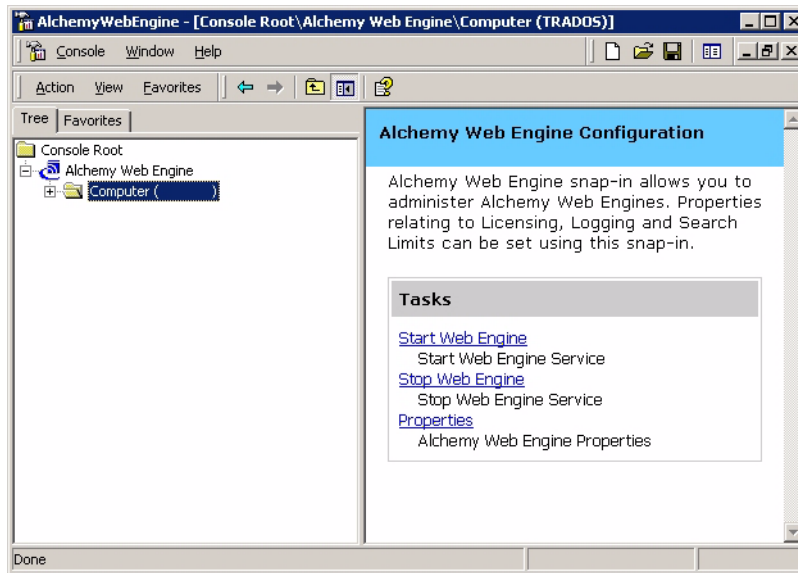
Select Computer dialog box

5. Do one of the following:

- Select the Computer Name option. Enter the computer name in the Computer Name box, or click the **Browse** button to locate the name of the Alchemy Web Engine computer.
- Select the Computer IP Address option. Enter the Alchemy Web Engine computer IP address in the Computer IP Address box.

6. Click **OK**.

The name of the selected Alchemy Web Engine computer appears as part of the Computer node description.



Alchemy Web Engine configuration: Alchemy Web Engine name

2.1.2 ADDING THE ALCHEMY SERVER COMPUTER

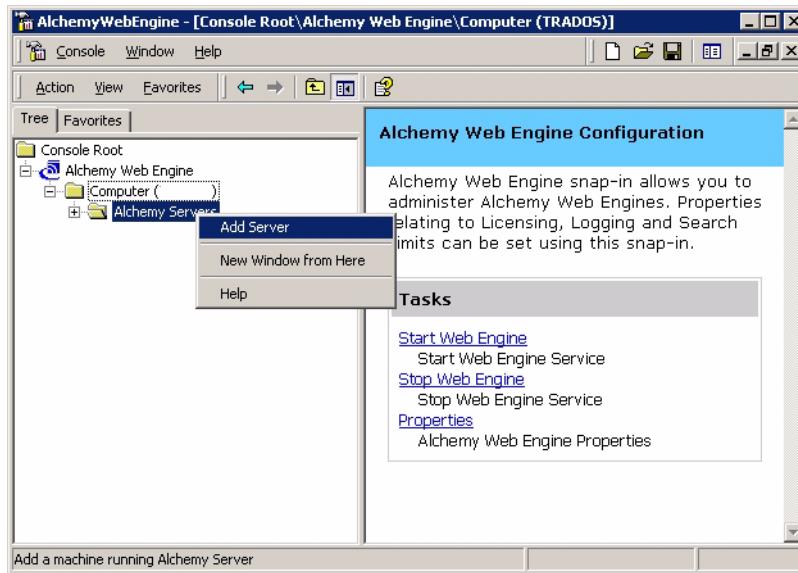
After adding an Alchemy Web Engine computer to your Alchemy Web Engine console you need to add an Alchemy Server computer. The Alchemy Server computer you will use with the Alchemy Web Engine gives you access to the databases that you want to make available to users over their Internet connection.



The Alchemy Server service must be running before you can add it to the Alchemy Web Engine.

To add an Alchemy Server computer to your Alchemy Web Engine console:

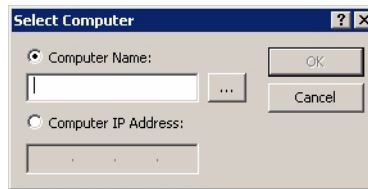
1. Expand the **Computer** node.
2. Right-click the **Alchemy Servers** node to display the shortcut menu.



Alchemy Servers node

3. Click **Add Server**.

The Select Computer dialog box appears.



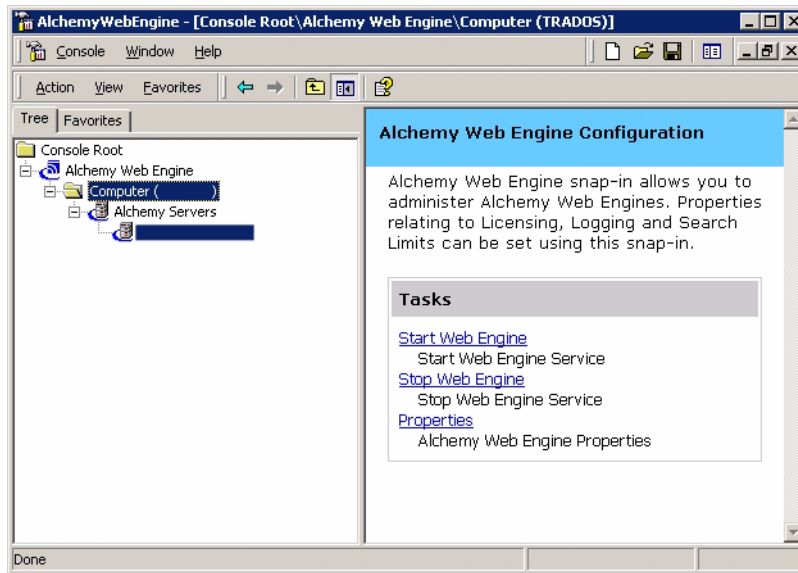
Select Computer dialog box

4. Do one of the following:

- Select the Computer Name option. Enter the computer name in the Computer Name box, or click the **Browse** button to locate the name of the Alchemy Server computer.
- Select the Computer IP Address option. Enter the Alchemy Server computer IP address in the Computer IP Address box.

5. Click **OK**.

6. The name of the selected Alchemy Server computer appears under the Alchemy Servers node.



Alchemy Server computer name

2.1.3 ENABLING AND DISABLING DATABASES

Before your users can use Alchemy Web to access databases over the Internet, you must first enable those databases in the Alchemy Web Engine console. Conversely, when you want to remove access to databases, you must disable those databases in the Alchemy Web Engine console.



Disabled databases appear with a small red X over the database icon .

Disabled databases are not available to end-users over the Internet.

To enable or disable databases in the Alchemy Web Engine console:

1. Expand the console tree to expose the **Alchemy Server computer** node.
2. Select the Alchemy Server computer node.

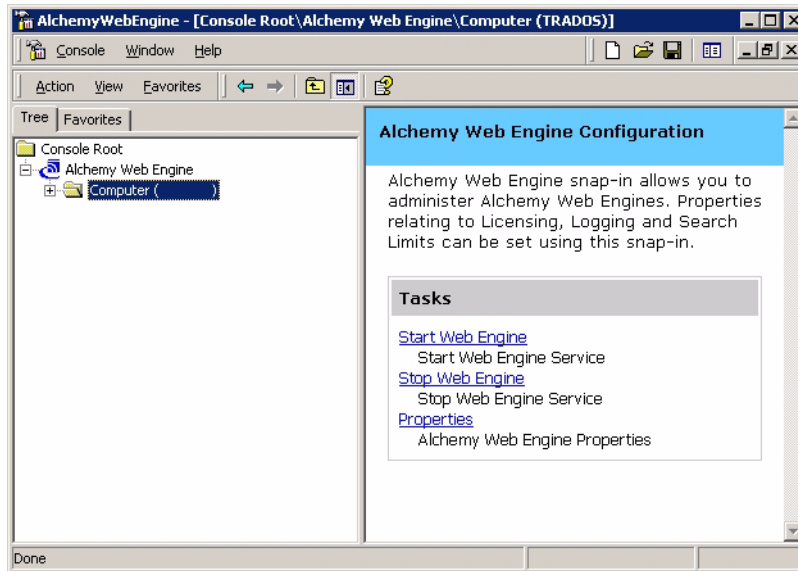
The list of databases controlled by the selected Alchemy Server computer appears in the details pane.

3. Do one of the following:
 - To enable all databases in the list, right-click the **Alchemy Server computer** node to display the shortcut menu, then click **Enable All Databases**.
 - To enable individual databases, right-click the database in the details pane to display the shortcut menu, then click **Enable**.
 - To disable all databases in the list, right-click the **Alchemy Server computer** node to display the shortcut menu, then click **Disable All Databases**.
 - To disable individual databases, right-click the database in the details pane to display the shortcut menu, then click **Disable**.

2.1.4 STARTING AND STOPPING THE ALCHEMY WEB ENGINE

To start or stop the Alchemy Web Engine:

1. In console tree, select the **Computer** node.



Computer Node selected

2. Do one of the following:
 - To start the Alchemy Web Engine, click the **Start Web Engine** link in the details pane.
 - To stop the Alchemy Web Engine, click the **Stop Web Engine** link in the details pane.
3. In the message box, click **OK** to confirm your action.



You can also start and stop the Alchemy Web Engine from the Services console, located under Administrative Tools on the Control Panel.



When you start or stop the Alchemy Web Engine from the Services console, you need to start or stop both the LM Service and the PM Service.

2.1.5 REMOVING AN ALCHEMY SERVER COMPUTER FROM THE ALCHEMY WEB ENGINE CONSOLE

Under certain circumstances, you may need to use different Alchemy Server computers in your organization with your Alchemy Web Engine. In order to do this, you must first remove the current Alchemy Server computer from the Web Engine console before you can add the new Alchemy Server computer.

To remove an Alchemy Server computer from the Alchemy Web Engine console:

1. Expand the console tree to expose **Alchemy Server computer** node.

2. Right-click the **Alchemy Server computer** node to display the shortcut node.
3. Click **Delete**.
4. Click **Yes** to confirm your action.

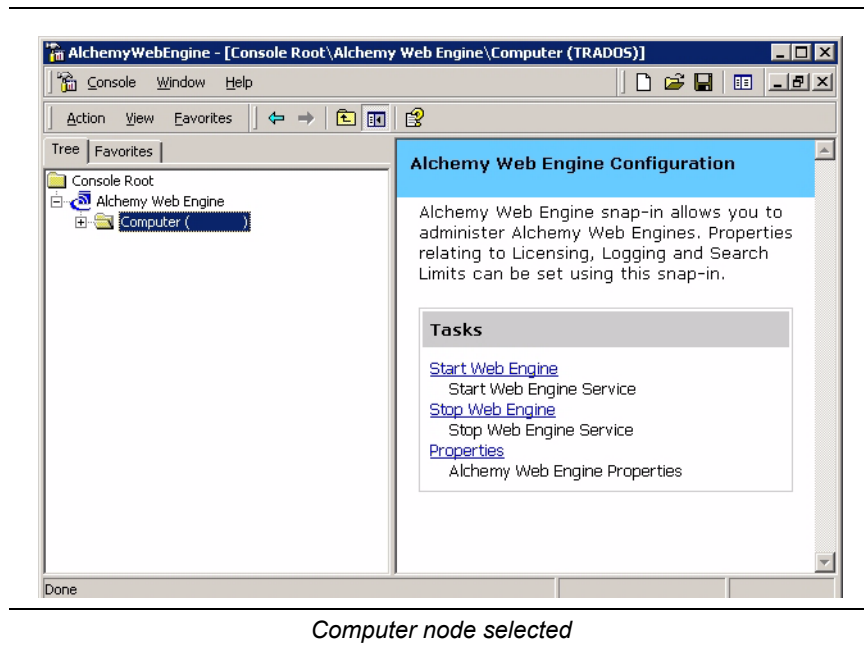
2.1.6 CONFIGURING ALCHEMY WEB ENGINE ADMINISTRATIVE SETTINGS

You administer the Alchemy Web Engine through the Web Engine console. Administrative properties that you can view and modify through the console include the following:

- License server settings
The licensing server is the Alchemy Server computer from which your Alchemy client applications and extensions receive their product licenses.
- Log manager settings
- Limit settings

To configure Alchemy Web Engine Administrative settings:

1. Expand the console tree to expose the **Computer** node.
2. Select the **Computer** node to display the Alchemy Web Engine Configuration page in the details pane of the console.



3. Under Tasks, click the **Properties** link.
The Alchemy Web Engine Properties dialog box appears.

Alchemy Web Engine Properties dialog box

4. Modify the properties on this dialog box, as desired.
5. When finished, click **OK** to save your changes and return to the Alchemy Web Engine configurator.

LICENSE SERVER



The settings under License Server are exposed for the purpose of handling exceptions and should not be changed. Changing these property settings may prevent Alchemy Web from running.

The settings under License Server allow you to view the following configuration information:

- **Config File Location**

The path in this box determines the location of the LicenseManagerService.exe.config file. This file contains the information that appears on the Web Engine Properties dialog box. The location of the LicenseManagerService.exe.config file cannot be modified and is displayed for reference only.

- **License Server Name**

This box displays the name of the Alchemy Server computer that manages the licensing information for your Alchemy WebEngine Platform.

To change this server:

- Click Select Server.
The Select Computer dialog box appears.
- Do one of the following:

- Select the Computer Name option. Enter the computer name in the Computer Name box, or click the **Browse** button to locate the name of the Alchemy Web Engine computer.
- Select the Computer IP Address option. Enter the Alchemy Web Engine computer IP address in the Computer IP Address box.
- Click **OK**.

- **Data Port Number**

This box displays the data port number that the Alchemy Server computer uses to communicate with client computers across your network. Alchemy Server uses the default data port number 3234.



Captaris strongly recommends that you do not change the default data port number unless absolutely necessary.

- **Maj Lic Number**

This box displays the major release number of the version of the Alchemy Server license used with your Alchemy Web installation.



Captaris strongly recommends that you do not change this number.

- **Min Lic Number**

This box displays the minor release number of the version of the Alchemy Server license used for your Alchemy Web installation.



Captaris strongly recommends that you do not change this number.

LOG MANAGER

The Log Manager settings allow you to control the following:

- Log size
- Log location
- Log name

The audit log records Alchemy Web events such as session start, session end, etc. The diagnostic log is a troubleshooting tool that records all audit log events, all error messages written to the Windows Event Viewer, program stack traces, etc. The diagnostic log function is disabled by default.

- **Audit Log Size (Kb)**

This box displays the maximum size, in kilobytes, that the audit log file can reach before Alchemy Web creates a new log file to contain subsequent log information. To change the audit log size, replace the current audit log size with a new value.

- **Audit Log Location**

This box displays the location where Alchemy Web saves the audit log file. To change this location do one of the following:

- Enter the path of the new location for the audit log file in the Audit Log Location box.
- Click **Browse** to select the new location for the audit log file.
- **Diagnostic Log Name**

This box displays the name of the diagnostic log name. To change the diagnostic log name, enter the new diagnostic log name in the Diagnostic Log Name box.
- **Diagnostic Log Location**

This box displays the location where Alchemy Web saves the diagnostic log file. To change this location, do one of the following:

 - Enter the path of the new location for the diagnostic log file in the Diagnostic Log Location box.
 - Click **Browse** to select the new location for the diagnostic log file.

LIMITS




Modifying the properties in this section of the Alchemy Web Engine Properties dialog box might affect performance of the server computer on which Alchemy Web Engine is installed. Before modifying these properties, Captaris recommends that you create counters in the Microsoft Performance Monitor to track performance changes on the server computer caused by modifying the properties in this section. Using these counters you can then determine the most efficient configuration for the server computer on which Alchemy Web Engine is installed.

The settings under the Limits section allow you to control the following:

- **Search Time Limit (minutes)**

This box displays the length of time that can pass, in minutes, before Alchemy cancels a search. You should set this time limit to a value less than the session timeout, which you set in Internet Information Services (IIS).
 - **Pool Manager Max Size**

This box displays the maximum number of Alchemy Web Engine PoolManager processes that can simultaneously exist on a computer. Each user request requires an available PoolManager process. A low maximum might create longer wait times or request time-outs for users; a high maximum requires more powerful hardware to support the number of processes. The possible range for this field is 1-64; the default value is 2.
- 
- You should only use a value of 1 when developing external applications using the Alchemy Web Software Developers Kit (SDK) or other third party development kit.*
- **Pool Manager Min Size**

This box displays the minimum number of Alchemy Web Engine PoolManager processes that will remain active at any given time. For example, if you set this value to 4, at least four PoolManager processes will always remain active, which allows at least four user requests to be processed simultaneously. The possible range for this field is 1-64; the default value is 2.



You should only use a value of 1 when developing external applications using the Alchemy Web Software Developers Kit (SDK) or other third party development kit.

- **Pool Manager Retries**

This field displays the number of times an Alchemy Web client will attempt to access an active PoolManager processes before receiving a message that states that the server is busy. This situation occurs in the event that all PoolManager processes are busy. A client will attempt to access a PoolManager process until one is available or the client reaches the maximum number of retries.

- **Search Result Limit**

This box displays the maximum number of items returned from a search. A search might potentially return thousands of items, so to avoid impacting performance on the server computer, you can limit the number of items returned. The default value is 100

For example, if you set this value to 100, a search that would otherwise return 10,000 items will only return the first 100 items. The user will then be notified that they have reached the set search limit and will be advised to refine their search arguments.

- **TOC Limit**

This box displays the maximum number of items that will be returned to populate the nodes in a table of contents. The default value is 100.

For example, if a database contains a folder with 200 items, and you set this value to 100, you will receive the first 100 items to populate the TOC under that folder.

2.2 CONFIGURING THE ALCHEMY WEB APPLICATION

You use the Alchemy Web Application console to control the following:

- The Alchemy Web site your users use to access database files over their Internet connection
- How your users' browser window will display the Alchemy Web page
- Which Alchemy Web user events will be tracked
- How users will display files in their browser window

After installing Alchemy Web for the first time, you need to configure the Web Application before your users can view files across the Internet using Alchemy Web. You configure Alchemy Web through the Alchemy Web Application console. When you configure Alchemy Web for use the first time you should complete the following tasks:

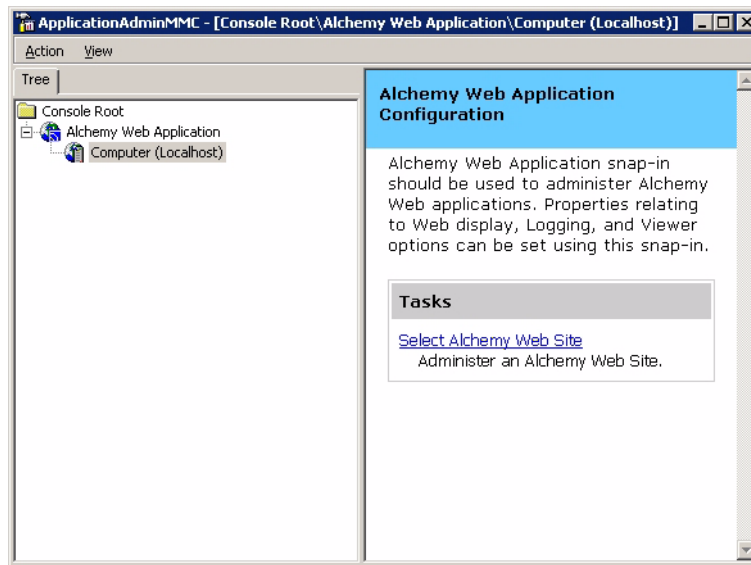
- Select the Alchemy Web site
- Configure the web display properties
- Configure the logging properties
- Configure the viewer properties

2.2.1 SELECTING THE ALCHEMY WEB SITE

To select an Alchemy Web site:

1. From the Programs menu, select **Alchemy | Web Application Configuration**.

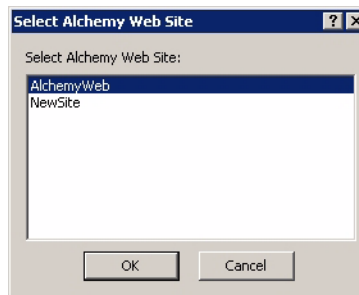
The Alchemy Web Application console appears.



Alchemy Server computer name under the Computer node

2. If necessary, expand the console tree and select the Computer node.
3. In the details pane, click the Select Alchemy Web Site link.

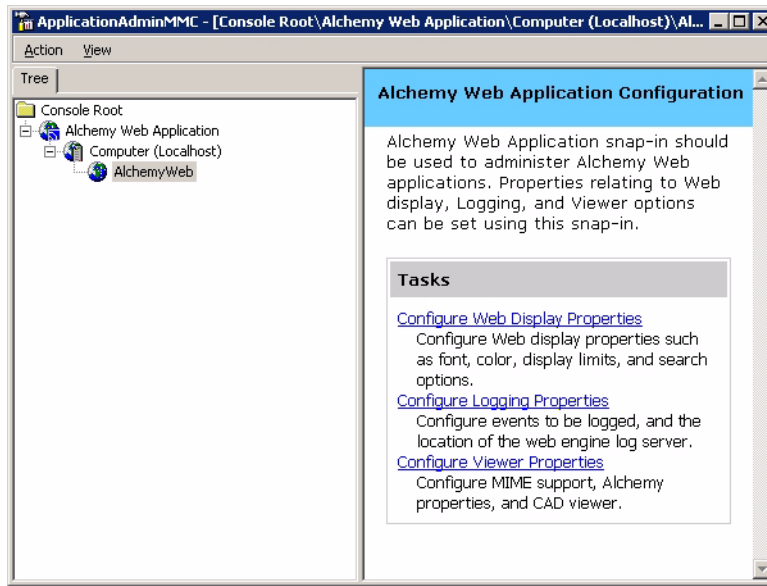
The Select Alchemy Web Site dialog box appears.



Select Alchemy Web Site dialog box

4. Select the Alchemy Web site that you want to use.
5. Click **OK**.

The Alchemy Web site you selected appears beneath the Computer node in the console tree and the Alchemy Web Application Configuration Tasks page appear in the details pane.



Alchemy Web Application console

2.2.2 CONFIGURING THE WEB DISPLAY PROPERTIES

The Alchemy Web display properties controls the following Alchemy Web Properties:

- **Display**
Display properties control how the Alchemy Web page appears in the client browser window.
- **Search**
Search properties control the search functionality available to the user in the client browser window and how the search results are displayed.
- **IIS**
IIS properties control time limits in Alchemy Web related to user inactivity an other operations.

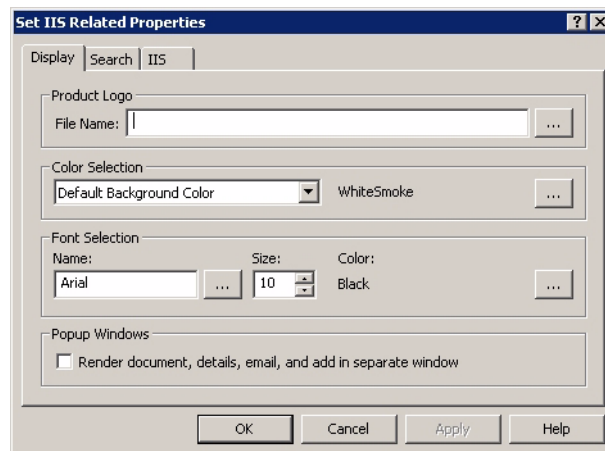
CONFIGURING THE ALCHEMY WEB DISPLAY PROPERTIES

Display properties control how the Alchemy Web page appears in the client browser window. The Alchemy Web display properties that you can configure are:

- Product logo
- Color selection
- Font selection
- Popup windows

To configure Web display properties:

1. In the details pane, click the **Configure Web Display Properties** link.
The Set IIS-Related Properties dialog box appears.



IIS Related Properties dialog box, Display tab

2. Configure the Alchemy Web display properties on the Display tab as necessary.

- **Product Logo**

You use this box to enter the path and name of an image file that will appear at the top right of all Alchemy Web pages your users view, or click the **Browse** button to locate the image file.



The image file you choose must be sized to align with the area for the product logo.

- **Color Selection**

Select the aspect of the user interface from the drop-down box for which you want to change the color. To change the color, click the **Color** button, then select the color from the displayed list. Click **OK** to apply your changes.

- **Font Selection**

To change the default font for your Alchemy Web pages, do one of the following:

- Enter the name of the font you want to use in the Name box, then enter the font size in the Size box. Next, if desired, click the **Color** button, then select the font color from the displayed list. Click **OK** to apply your changes.
- Click the **Font** button to display the Font properties dialog box. Select the desired font, font style, and font size from the appropriate lists. Click **OK** to apply your changes. Next, if desired, click the **Color** button, then select the font color from the displayed list. Click **OK** to apply your changes.

3. Do one of the following:

- Click **Apply** to save your changes.
- Click **OK** to save your changes and close the IIS Related Properties dialog box.

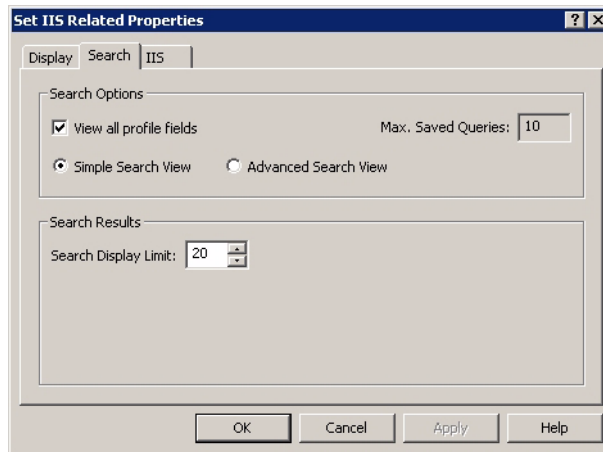
CONFIGURING THE ALCHEMY WEB SEARCH OPTIONS

Search properties control how search functionality appears and works in client browser windows. The Alchemy Web display properties that you can configure are:

- Search options
 - View all profile fields
 - Simple Search view
 - Advanced Search view
- Search results display limit

To configure Web Search properties:

1. If necessary, open the IIS Related Properties dialog box.
2. Click the **Search** tab.



IIS Related Properties dialog box, Search tab

3. Configure the Alchemy Web Search properties as necessary.

- **View all profile fields**

Select this option to display a “View all fields” option in the Alchemy Web client browser window under the Search tab. This gives the user the option to view all available profile fields for the selected databases in the search query.



If more than one database is selected for the search operation, when the user selects the “View all fields” option, the profile fields displayed will represent a cross-section of all profile fields common to the selected databases.

- **Default Search View**

Select the default Search view that will appear in client browser window. You can select Simple Search view or Advanced Search view. The options correspond to the Simple Search and Advanced Search functionality in Alchemy Administrator and Alchemy Search.

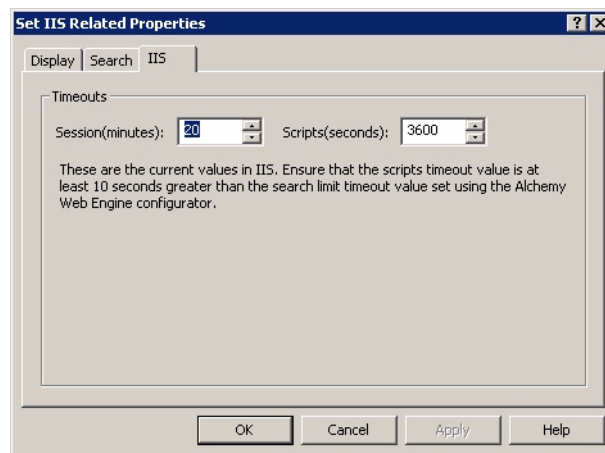
- **Search Display Limit**

Use this box to set the maximum number of search results that will appear on the search results page. *For example, if a search returns 100 hits, when you set this limit to 20, you will receive five pages that display 20 search hits each.*

4. Do one of the following:
 - Click **Apply** to save your changes.
 - Click **OK** to save your changes and close the IIS Related Properties dialog box.

CONFIGURING THE ALCHEMY WEB IIS-RELATED PROPERTIES

1. If necessary, open the IIS Related Properties dialog box.
2. Click the **IIS** tab.



IIS Related Properties dialog box, IIS tab

3. Configure the Alchemy Web IIS properties as necessary.
 - **Session Timeout**
Use this box to set the maximum length of inactivity, in minutes, that can pass before Alchemy Web logs out a user.
 - **Scripts timeout**
Use this box to set the amount of time, in seconds, that Alchemy Web uses to complete a script before returning an error.
4. Do one of the following:
 - Click **Apply** to save your changes.
 - Click **OK** to save your changes and close the IIS Related Properties dialog box.

2.2.3 CONFIGURING THE ALCHEMY WEB LOGGING PROPERTIES



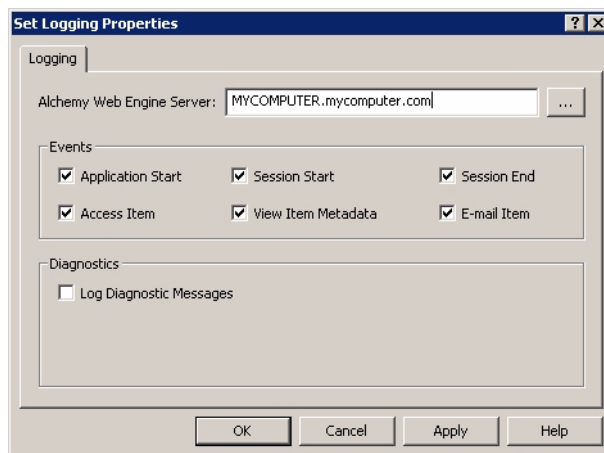
For multiple-computer installations, Windows 2000 Server SP3, Windows 2000 Advanced Server SP3, or Windows 2003 Server is required in order to use Alchemy Web logging functionality.

The Alchemy Web logging properties allow you to select what user actions you want to record in a log file. You can also select to record all diagnostic information in a diagnostic log file.

To configure Alchemy Web logging properties:

1. In the details pane, click the **Configure Logging Properties** link.

The Set Logging Properties dialog box appears.



Set Logging Properties dialog box

2. Configure Alchemy Web logging properties as necessary.

- **Alchemy Web Engine Server**

Use this box to select the Alchemy Web Engine computer for which you want to log events, or click the **Browse** button to locate the Alchemy Web Engine computer on the network.



The default server name in the Alchemy Web Engine Server box is the name of the computer on which you installed the Alchemy Web Engine.

- **Application Start**

Select this event to record when the Alchemy Web application starts to run on the Alchemy Web Application server.

- **Session Start**

Select this event to record the start of an Alchemy Web IIS session for a given user.

- **Session End**

Select this event to record the end of an Alchemy Web IIS session for a given user.

- **Access Item**

Select this event to record when a user attempts to access an item in a database.

- **View Item Metadata**

Select this event to record when a user attempts to view the detail information for an item in a database.

- **Email Item**

Select this event to record when a user attempts to email an item in a database.

- **Log Diagnostic Messages**

Select this event to record diagnostic information in a diagnostic log file.



You can set the name and the location where Alchemy Web stores the diagnostic log file on the Alchemy Web Engine Properties dialog box, which is available from the Alchemy Web Engine configuration console.

See [Configuring Alchemy Web Engine administrative settings](#) for more information.

3. Click **OK** to save your changes and close the Set Logging Properties dialog box.

2.2.4 CONFIGURING THE ALCHEMY WEB VIEWER PROPERTIES

Alchemy Web viewer properties give you control over how information presented in the client browser window is viewed. The Alchemy Web viewer properties that you can configure are:

- MIME type support settings
- Alchemy properties
- Configuring file cache cleanup utility properties
- CAD viewer settings
- Viewing large files in Alchemy Web



In order to increase performance, requests to view, download, and e-mail all supported file types in Alchemy Web send an encrypted copy of the file to the file cache Doc directory under the IMRViewer directory in the Alchemy Web Application installation location. To effectively manage the size of this directory, you should configure the File Cache Cleanup utility to run at regularly scheduled intervals.

For more information about this, see “[Configuring Alchemy Web file Cache Cleanup properties](#)” on page 2-24

MIME TYPE SUPPORT SETTINGS FOR NATIVE VIEWING

Alchemy Web supports a number of different methods for viewing files. These viewing methods include:

- Native viewing using the First Viewer
- Native viewing using other third party viewers
- Spicer ViewCafé for CAD file types
- HTML export.

Using MIME types gives you the ability to control which native viewers you use to view files through Alchemy Web. The Set Viewer Properties dialog box accessed from the Alchemy Web Application MMC console allows you to set your MIME type settings by:

- Adding MIME type support settings
- Changing MIME type support settings

- Enabling viewer support for MIME types
- Disabling viewer support for MIME types

First Viewer

Alchemy Web supplies its own internal file viewer that, when the application is installed, is set as the default viewer type for supported file types. The MIME type/subtype combination for the First viewer is application/x-IMRWViewer. File types supported by this viewer are:

- PDF, TEXT, TIF, PNG, JPEG, GIF, TRG, BMP, PCX, DCX, COLD overlays, 301

When an Alchemy Web client requests to view a supported file type for the first time, Alchemy Web attempts to download the First viewer to the client computer. A standard Microsoft security warning dialog box appears asking the user if he/she wants to download the viewer. To download the viewer to the client computer, the user should click **Yes**. If the user clicks **No**, the viewer will not be downloaded to the client computer and the user will be unable to view the image unless you change the MIME types for supported file types to the MIME type/subtype that you wish for that file type on the MIME tab on the Set Viewer Properties dialog box.



The user must possess sufficient permissions on the Alchemy Web client computer in order to install the First Viewer.

Alchemy Web file viewing hierarchy

When a user requests to view a file from the Alchemy Web site, Alchemy Web will attempt to display the file using the available file viewers in the following order:

- The First Viewer - This is the default file viewer for supported file types listed under “First Viewer”.
- Native viewing for other file types not supported by the First Viewer, including CAD file types.
- Spicer ViewCafé for CAD file types if the viewer is installed and the option has been selected and configured on the CAD tab under the Set Viewer Properties dialog box.
- If licensed, Neutral viewing through HTML Export.

If the requested file type is not supported by any of the above file viewers, a “No viewer available.” message appears.



If you use Alchemy Web to access databases that contain OCR files (.OCR file type) that use text overlays, you need to change the MIME file type/subtype from text/plain to application/x-IMRWViewer in the Supported MIME Types list.

Alchemy Web supports the viewing of DICOM standard medical (DCM) images using Native viewing. To view DICOM standard medical images using Native viewing you need to add the DICOM image type (DCM) to your MIME type settings and install a medical image viewer on your client workstations.

Please note, however, that only profile fields for DICOM images are indexed when the images are added to a database. As such, you can only search on those profile fields rather than file content when including DICOM images in a search query.

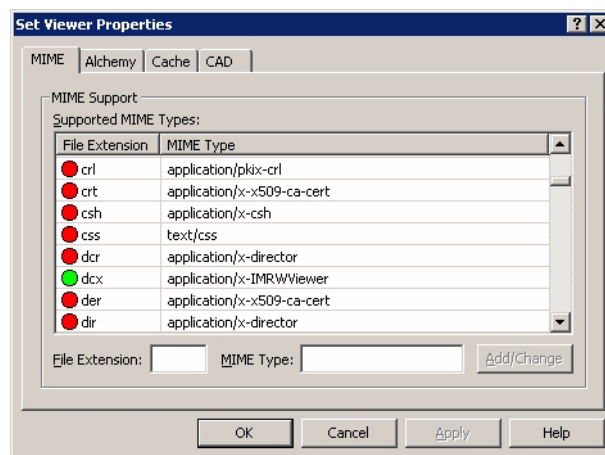
If you do not already use a DICOM image viewer, an example of one that is available free of charge is ezDICOM, which can be downloaded from the Internet.

You can view CAD files using Native, Spicer ViewCafé, or Neutral viewers. To use Spicer ViewCafé to view CAD files you must enable CAD viewing through the Alchemy Web Application Admin MMC and have installed a licensed copy of Spicer ViewCafé.

To add a MIME type support setting:

1. In the details pane, click the **Configure Viewer Properties** link.

The Viewer Properties dialog box appears.



Set Viewer Properties dialog box, MIME tab

2. In the **File Extension** box, enter a file extension using a three character syntax, *for example, mpg*.
3. In the **MIME Type** box, enter the MIME type/subtype combination that you want to use for the given file type. *For example, the MIME type/subtype combination for MPEG files is video/mpeg*.
4. Click **Add/Change** to add your new MIME type to the MIME type support list.

5. Click **Apply** to save your changes

To change an existing MIME type support setting:

1. In the details pane, click the **Configure Viewer Properties** link.
The Viewer Properties dialog box appears.
2. Select the MIME type from the MIME type support list that you want to change.
3. Do the following as necessary:
 - In the **File Extension** box, enter a file extension using a three character syntax, *for example, mpg*.
 - In the **MIME Type** box, enter the MIME type/subtype combination that you want to use for the given file type. *For example, the MIME type/subtype combination for MPEG files is video/mpeg*.
4. Click **Add/Change** to add your new MIME type to the MIME type support list.
5. Click **Apply** to save your changes

To enable or disable viewer support for MIME types



Enabled MIME types in the MIME type Support list are designated by a green circle.

Disabled MIME types in the MIME type Support list are designated by a red circle.

1. In the MIME type support list, right-click the MIME type that you want to enable or disable to display the shortcut menu.
2. Do one of the following:
 - To enable a disabled MIME type, click Enable.
 - To disable an enabled MIME type, click Disable.

The circle next to the MIME type changes color to denote an enabled or a disabled MIME type.

CONFIGURING ALCHEMY PROPERTIES

Allow Document Adds to Databases

Alchemy Web provides two ways for you to control file adds to databases accessed through Alchemy Web clients.

The first allows you to control file add functionality at the group and/or user level through settings in the Role-based Access Control (RBAC) component of Alchemy Server integrated security. You should use this method to control file add functionality in Alchemy Web if you use Alchemy Server integrated security to create group and user roles to control access to Alchemy databases.

For more information about using RBAC to control file adds to databases accessed through Alchemy Web, please see the Alchemy Server Administrator Guide.

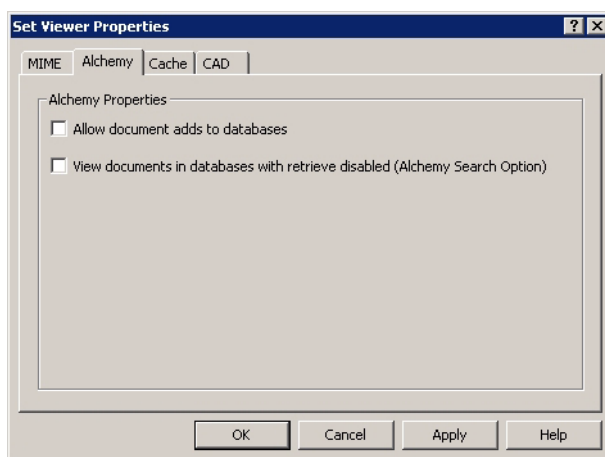
The second allows you to control file add functionality at the Web site level through a setting on the Set Viewer Properties dialog box in the Alchemy Web Application MMC console. You should use this method to control file adds at the Web site level if you do not use Alchemy Server integrated security to control group/user access to Alchemy databases and/or Alchemy clients that are not compatible with RBAC are used to access databases through Alchemy Web.



Individuals logged into an Alchemy Web site under the anonymous user account cannot use the File Add feature.

To allow file adds through the Alchemy Web Application MMC Configurator:

1. If necessary, open the Set Viewer Properties dialog box.
2. Click the Alchemy tab.



Set Viewer Properties dialog box, Alchemy tab

3. Select the **Allow document adds to databases** check box.
4. Do one of the following:
 - Click **Apply** to save your changes.
 - Click **OK** to save your changes and close the Set Viewer Properties dialog box.

View Documents in Databases with File Retrieve Disabled

The Disable Retrieve option in Alchemy prevents Alchemy Web clients from viewing files in databases in which this option has been activated. By activating the View documents in databases with retrieve disabled option, you give Alchemy Web clients the ability to view files in such databases.



Though activating the View documents in databases with retrieve disabled option in Alchemy Web allows Alchemy Web clients to view files in databases with the retrieve files function disabled, Alchemy Web clients will still be unable to download or print files from the database.



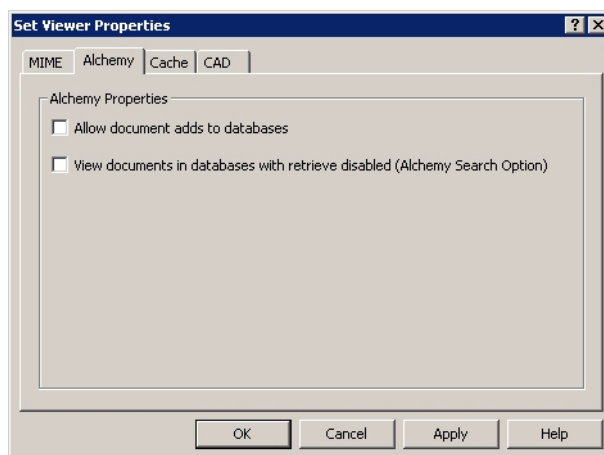
If you choose to activate the *View documents in databases with retrieve disabled* option, Captaris strongly recommends that you first activate both the *Disable Retrieve* and *Disable Print* functions in the database before making it accessible through Alchemy Web.

Alchemy Web, and browser-based applications in general, cannot guarantee that files viewed from Alchemy databases with the *Disable Print* option selected will not be able to print the files after they have been viewed. When a file is viewed in Alchemy Web, a copy of the file is downloaded to the Alchemy Web client computer's temporary internet file directory by the browser, which is a location that Alchemy Web does not have exclusive control of.

Likewise, activating the *View documents in databases with retrieve disabled* option in Alchemy Web allows a copy of the viewed file to be downloaded to the Alchemy Web client computer's temporary internet file directory by the browser.

To view files in documents with retrieve disabled:

1. If necessary, open the Set Viewer Properties dialog box.
2. Click the Alchemy tab.



Set Viewer Properties dialog box, Alchemy tab

3. Select the **View documents in databases with retrieve disabled** check box.
4. Do one of the following:
 - Click **Apply** to save your changes.
 - Click **OK** to save your changes and close the Set Viewer Properties dialog box.

CONFIGURING ALCHEMY WEB FILE CACHE CLEANUP PROPERTIES

To facilitate the viewing of previously accessed files, copies of the files are stored in file cache folders located under a shared directory named IMRViewer under the Alchemy Web Application installation location. The two file cache folders are named Doc and Ovl. The Doc folder stores copies of previously viewed files. The Ovl folder stores copies of document overlay files attached to previously viewed files.

A cache cleanup utility manages the file cache folders using Windows Task Scheduler and the Alchemy Web Application MMC console. During Alchemy Web Application installation, a default cache cleanup utility schedule is created that runs the cache cleanup utility on a regular basis. You can modify this scheduled task through the Cache tab on the Set Viewer Properties dialog box in the Alchemy Web Application MMC console.

The default parameters for the cache cleanup utility are:

- Document Cache folder:
 - Size = 1 GB
 - Time = 1 day
- Overlay Cache folder:
 - Size = 200 MB
 - Time = 1 week

Size is the total size of all files stored in the cache folder.

Time is the age or amount of elapsed time since the file was last accessed by a user.



Once the cache folder has reached the maximum size specified, files are deleted based on the specified file age limit.

When the cache cleanup utility runs, it compares the current state of the Doc and Ovl folders against the parameters set in the Alchemy Web Application MMC console to determine if stored files should be deleted from the respective folders. If the parameters set in the Alchemy Web Application MMC Configurator are not met, files are not deleted from the folders.



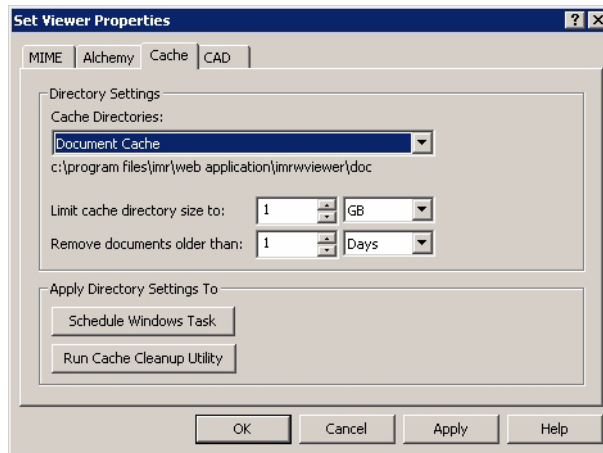
You can also manually run the cache cleanup utility from the Alchemy Web Application MMC console. As with the cache cleanup utility scheduled task, if the parameters set in the Alchemy Web Application MMC console are not met, files are not deleted.



The file cache cleanup task applies to both file cache folders. You CANNOT create separate scheduled tasks for each file cache folder.

To configure the file cache cleanup utility:

1. If necessary, open the Set Viewer Properties dialog box.
2. Click the Cache tab.



Set Viewer Properties dialog box, Cache tab

3. Under Directory Settings, select the cache folder whose properties you want to configure from the Cache Directories drop-down list.
4. Enter the maximum cache directory size for the selected cache folder in the **Limit cache directory size to** box.
5. Select the maximum cache directory size unit from the Cache Directory Size Unit drop-down list. Your choices are:
 - megabytes (MB)
 - gigabytes (GB)
6. Enter the maximum file age in the **Remove documents older than** box.
7. Select the document age range from the Remove documents older than drop-down list. Your choices are:
 - hours
 - days
 - weeks
 - months
8. Do one of the following:
 - Click **Apply** to save your changes.
 - Click **OK** to save your changes and close the Set Viewer Properties dialog box.

To edit the cache cleanup utility scheduled task:

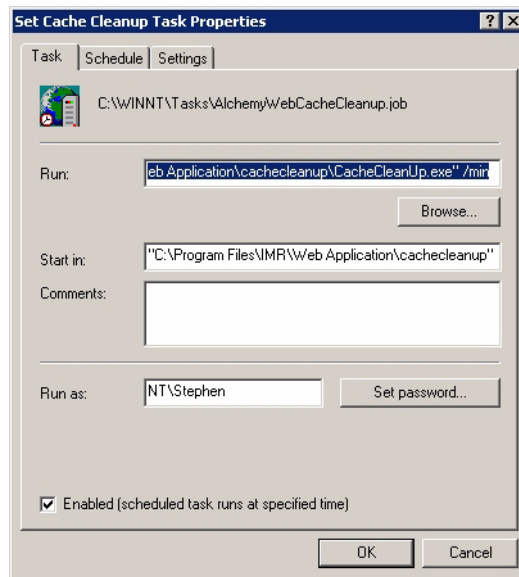


The default installed cache cleanup scheduled task is configured to run daily (once every 24 hours) at 12:01 AM. The initial start date for this task is the computer system date.



Click **Run Cache Cleanup Utility** under **Apply Directory Settings** to, to manually run the cache cleanup utility if you want to clean the cache folders inbetween the scheduled task.

1. If necessary, open the Set Viewer Properties dialog box.
2. Click the Cache tab.
3. Under **Apply Directory Settings** to, click **Schedule Windows Task**.
The Set Cache Cleanup Task Properties dialog box appears.



Set Cache Cleanup Task Properties dialog box

4. Edit the cache cleanup task properties as necessary.
5. Click **OK** to save your settings and close the Set Cache Cleanup Task Properties dialog box.



The name of the cache cleanup utility scheduled task is **xxxxxxcachecleanup**, where **xxxxxx** is the name of the virtual directory on the Alchemy Web Application computer. When editing the scheduled task, **DO NOT** change this task name. If you do, the task will not run.

CONFIGURING CAD VIEWER SETTINGS



The following settings only apply if you have the appropriate Spicer ViewCafé software that allows you to view CAD files. Otherwise, you should view CAD files using either *Native* or *Neutral* viewing.

By default, when running Alchemy Web in a Windows 2003 Server environment, the Alchemy Web Application uses Spicer ViewCafé version 3.2 to view CAD files. If you use Spicer ViewCafé version 3.1, you will need to edit your Web.config file so that Alchemy Web will recognize your version of Spicer ViewCafé.



The Web.config file is located in the Web Application directory on the computer where you installed Alchemy Web Application.

To edit your Web.Config file to use Spicer ViewCafé version 3.1:

1. Open your Web.config file in a suitable text editor.
2. Locate the following lines of code:

```
<!-- THIS VALUE IS NOT EXPOSED IN THE ADMINISTRATIVE MMC Snap-In-->
<!-- Depending on the version of View Cafe - different JAR files may be
necessary. -->
<!-- ViewCafe 3.1 JAR File name -->
<!-- <add key="CADJARFileName" value="install3d-1_2_1_04.jar" /> -->
<!-- ViewCafe 3.2 JAR File name -->
<add key="CADJARFileName" value="install3d-1_3_1.jar"/>
```

3. Under ViewCafe 3.2 JAR File name, comment out the following line:

```
<add key="CADJARFileName" value="install3d-1_3_1.jar"/>
```

4. Under ViewCafe 3.1 JAR File name, remove the comment marks from the following line:

```
<!-- <add key="CADJARFileName" value="install3d-1_2_1_04.jar" /> -->
```

5. When finished, save your changes and close the Web.config file.

6. Proceed with configuring Alchemy Web to use Spicer ViewCafe to view CAD files.

When you enable Alchemy Web to view CAD files using Spicer ViewCafé the default download location for the JRE file is <http://java.sun.com/products/plugin/1.3/jinstall-13-win32.cab>. Under certain circumstances you may need to change this default download location. You can do this by editing your Web.config file.

To change the default JRE file download location:

1. Open your Web.config file in a suitable text editor.
2. Locate the following lines of code under <!-- CAD entries -->:

```
<!-- This entry by default points to Sun Microsystems. Clients can
modify this to point to a client specific location where this CAB file
is located. -->
```

```
<add key="JREDownloadLocation" value="http://java.sun.com/products/
plugin/1.3/jinstall-13-win32.cab" />
```

3. Modify the following line of code to include your alternate download location:

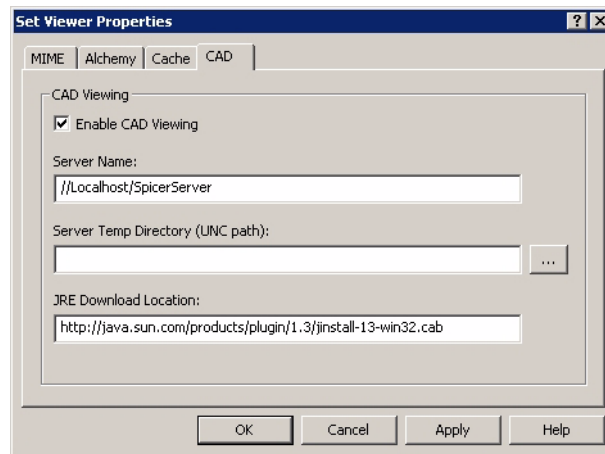
```
<add key="JREDownloadLocation" value="http://java.sun.com/products/
plugin/1.3/jinstall-13-win32.cab" />
```

4. When finished, save your changes and close the Web.config file.

5. Proceed with configuring Alchemy Web to use Spicer ViewCafe to view CAD files.

To configure your CAD viewer settings to use Spicer ViewCafé:

1. If necessary, open the Set Viewer Properties dialog box.
2. Click the CAD tab.



Set Viewer Properties dialog box, CAD tab

3. Select the **Enable CAD Viewing** check box.
4. Enter the appropriate information for your Spicer ViewCafé CAD viewing software
5. Do one of the following:
 - Click **Apply** to save your changes.
 - Click **OK** to save your changes and close the Set Viewer Properties dialog box.

CONFIGURING ALCHEMY WEB TO VIEW LARGE FILES

When viewing, adding, or downloading large (10 MB or greater) files, users may receive an error message that states, “The page cannot be displayed.” This error occurs when an ASP.NET HTTP runtime setting is too small for the file being processed. This size limit is controlled by the `MaxRequestLength=“10000”` setting in the web.config file. The default Web page size limit of 10,000 means that the maximum size of an HTTP request is 10 MB. Large files embedded in an HTTP request through Alchemy Web can exceed this maximum limit. To prevent this error from occurring, you need to modify the `MaxRequestLength` setting in the web.config file.

To modify this setting:

1. Open the web.config file in a text editor such as Notepad.
2. Modify the **MaxRequestLength** setting as necessary and save your changes to the web.config file.



You may need to change this setting a few times before finding the correct total size limit for HTTP requests through Alchemy Web. This is due to the fact that the total HTTP request is actually larger than the file itself. For example, if the largest file your Alchemy clients will request is 10 MB, you may need to set the `MaxRequestLength` in the web.config file to 11000 to cover the total request size.

CONSIDERATIONS FOR FIREWALLS AND ALCHEMY WEB REMOTING PROTOCOL

WHAT THIS CHAPTER COVERS

Alchemy Web Application and the Web Service component of the Alchemy Web Engine Platform use .NET Remoting, which is an architecture that simplifies communication between objects located in different process domains or on different computers. The .NET Remoting facilitates communication between clients; Alchemy Web Application and the Alchemy Web product; the Web Service in the Alchemy Web Engine Platform product and the Alchemy Web Engine, allowing computer configuration flexibility and scalability. .NET Remoting uses different Channels (transport protocols) and Formatters (serialized messages passed between objects to a specific stream format) to enable communication between objects across a remoting boundary. Captaris has tested various protocols and formatters for performance and throughput. The TCPBinary channel/formatter outperformed all others tested. Therefore, Alchemy Web and Alchemy Web Engine Platform are released configured for TCPBinary.

Changes to the standard protocol configuration will only be necessary if there is a firewall between the client computer, which is also the IIS server, and the Alchemy Web Engine computer, and you do not wish to open a TCP port in your firewall. Under these conditions remoting protocol should be changed to HTTPSOAP. To do this, you will need to change the TCPBinary channel/formatter to the HTTPSOAP protocol in three configuration files.

The changes required to convert these files to HTTPSOAP are marked in bold font in the file examples. Modifications to these files can be performed in a text editor such as Notepad. Before you begin, make a copy of all three files with a prefix in the file name of TCPBin for later identification.

This chapter contains the following sections:

- Modifying LicenseManagerService.exe.config
- Modifying PoolManagerService.exe.config
- Modifying PlatformClient.exe.config

A.1 MODIFYING LICENSEMANAGERSERVICE.EXE.CONFIG

File: LicenseManagerService.exe.config

Location: ..\Web Engine directory of the computer on which you installed Alchemy Web Engine.

File content:

```

<configuration>
  <system.runtime.remoting>
    <application name="AlchemyWebLicenseManager">
      <service>
        <wellknown mode="Singleton"
type="IMR.Alchemy.Platform.LicenseManager, LicenseManager"
objectUri="LicenseManager.soap"/>
      </service>
      <channels>
        <channel ref="http" port="8001">
          delete:<clientProviders>
          delete:<formatter ref="binary"/>
          delete:</clientProviders>
        </channel>
      </channels>
    </application>
  </system.runtime.remoting>
  <appSettings>
    <add key="LicenseVersionMajor" value="7"/>
    <add key="LicenseVersionMinor" value="3"/>
    <add key="AuHomeServerPortNumber" value="3234"/>
    <add key="AuHomeServer" value="DEVSERVER"/>
    <add key="AuServiceName" value="Alchemy Server"/>
    <add key="AuServiceStartUpTimeOut" value="60"/>
    <add key="ApplicationURL" value="http://localhost:8001/
AlchemyWebLicenseManager/LicenseManager.soap"/>
    <add key="RenewInterval" value="300000"/>
    <add key="ConnectionExpireInterval" value="300000"/>
    <add key="ConnectionRetryInterval" value="15000"/>
  </appSettings>
</configuration>

```

A.2 MODIFYING POOLMANAGERSERVICE.EXE.CONFIG

File: PoolManagerService.exe.config

Location: ..\Web Engine folder of the computer on which you installed Alchemy Web Engine.

File content:

```

<configuration>
  <system.runtime.remoting>
    <application name="AlchemyWebPlatformPoolManager">
      <service>
        <wellknown mode="Singleton"
type="IMR.Alchemy.Platform.PoolManager, PoolManager"
objectUri="PoolManager.soap" />
      </service>
    </application>
  </system.runtime.remoting>
</configuration>

```

```

</service>

    <channels>
        <channel ref="http" port="8000" >
            delete:<clientProviders>
            delete: <formatter ref="binary"/>
            delete:</clientProviders>
        </channel>
    </channels>

    <client url="http://localhost:8001/AlchemyWebLicenseManager">
        <wellknown type="IMR.Alchemy.Platform.LicenseManager,
LicenseManager" url="http://localhost:8001/AlchemyWebLicenseManager/
LicenseManager.soap" />
    </client>
</application>
</system.runtime.remoting>

<appSettings>
    <add key="ApplicationURL" value="http://localhost:8000/
AlchemyWebPlatformPoolManager/PoolManager.soap" />
</appSettings>
</configuration>

```

A.3 MODIFYING PLATFORMCLIENT.EXE.CONFIG

File: PlatformClient.exe.config

Location: ..\Web Application\config folder of the computer where Alchemy Web Application was installed.

File content:

```

<configuration>
    <system.runtime.remoting>
        <application name="AlchemyWebPlatformPoolManagerClient">
            <client url="http://devserver.imrlab.com:8000/
AlchemyWebPlatformPoolManager">
                <wellknown type="IMR.Alchemy.Platform.PoolManager, PoolManager"
url="http://devserver.imrlab.com:8000/AlchemyWebPlatformPoolManager/
PoolManager.soap"/>
            </client>
            <client url="http://devserver.imrlab.com:8001/
AlchemyWebLicenseManager">
                <wellknown type="IMR.Alchemy.Platform.LicenseManager,
LicenseManager" url="http://devserver.imrlab.com:8001/
AlchemyWebLicenseManager/LicenseManager.soap"/>
            </client>

```

```
<channels>
  <channel ref="http" clientConnectionLimit="100"/>
</channels>
</application>
</system.runtime.remoting>
</configuration>
```

For the changes to take effect restart the Web Application (restart IIS) and start and stop the Web Engine services.

SECURING DATABASE ACCESS IN ALCHEMY WEB

WHAT THIS CHAPTER COVERS

Like Alchemy Server, Alchemy Web supports both classic Alchemy database security and Alchemy Server Integrated Security introduced in Alchemy Release 7.3. Using classic Alchemy database security or Alchemy integrated security you can manage access to database groups, individual databases and folders or even specific files within a single database. The installation configuration of Alchemy Web, however, determines how you enable and manage database security within Alchemy Web.

This chapter contains the following sections:

- IIS Security Through Authentication
- Classic Alchemy Database Security in Alchemy Web
- Classic Alchemy Database Security Setup Considerations for Alchemy Web
- Alchemy Server Integrated Security in Alchemy Web
- Alchemy Server Integrated Security Setup Considerations: Creating Multiple Web Sites

B.1 IIS SECURITY THROUGH AUTHENTICATION

Alchemy Web works with Microsoft Internet Information Services (IIS) to provide Internet/Intranet access to Alchemy databases for Alchemy Web clients. IIS provides user authentication methods for client access control.

Alchemy Web supports Anonymous access, Basic authentication and Integrated Windows authentication methods. The Alchemy Web site that was created when you installed Alchemy Web Application inherits its authentication methods from the IIS master properties. This means that by default, your Alchemy Web site will probably initially have anonymous access and Windows Integrated authentication enabled.

Anonymous access allows any Web browser user with knowledge of your URL to access your Alchemy databases controlled through Alchemy Web. In certain instances, this may be acceptable for your specific business model. If anonymous user access is not acceptable, you can disable this setting at the Web site level through the IIS Administrative console. For instructions regarding modifying authentication settings through the IIS Administrative console, see “Setting Display and IIS-Related Properties” on page 2-12.

When you disable anonymous access, all Web browser users attempting to access your Alchemy Web published databases, are authenticated as a valid domain user in your environment. If authentication fails, the user attempting to access the database is not granted access. If your business needs require both anonymous and authenticated user access, you can create an Alchemy Web site for each type of user access. For more information regarding setting up different types of Alchemy Web sites, see “Alchemy Server Integrated Security Setup Considerations” on page B-4.

B.2 CLASSIC ALCHEMY DATABASE SECURITY IN ALCHEMY WEB

Classic Alchemy database security where database passwords, security groups and group passwords can be applied to Alchemy databases functions the same in Alchemy Web as in Alchemy. Each database in the list of databases that are enabled/published for Alchemy Web is checked for database password or security group(s). When secured databases are found the browser user is prompted for the database password and/or security group name and password for each secured database in the list. The browser user must enter the correct information for all secured databases or access is denied to all databases in the list.

If there is a mix of secured and unsecured databases and the browser users omits all password information for the secured databases and presses the Submit button on the page the databases without security will be made available.

B.3 CLASSIC ALCHEMY DATABASE SECURITY SETUP CONSIDERATIONS FOR ALCHEMY WEB

No special setup is required other than adding security to databases through Alchemy Build if not already added. Refer to ‘Overview of Security’ in the Alchemy Build on-line help.

B.4 ALCHEMY SERVER INTEGRATED SECURITY IN ALCHEMY WEB

Alchemy Server integrated security is used to maintain more precise access control over databases managed by Alchemy Server. Database access is managed by creating specific Alchemy security roles then mapping domain/local groups and/or users and databases to those roles. The first step in using Alchemy Server integrated security with Alchemy Web is planning and defining the roles needed for your business environment, then setting up these roles in Alchemy Server if you have not already done so. Refer to the Alchemy Server Administrator’s Guide, ‘Using Alchemy Server Integrated Security’ for more information regarding defining and creating roles needed to implement Alchemy Server Integrated Security.

Alchemy Web installation brings additional considerations to the database security plan. Browser users will be accessing databases and their user IDs must be added to the Alchemy Server integrated security roles along with the databases they are allowed to access. The browser user IDs could be their network logon IDs or could be anonymous users depending on the IIS (Internet Information Server) authentication methods in place for your Alchemy Web site(s). In addition to user IDs, consideration must be given to the computer/resource configuration for Alchemy Web, single computer or multiple computers and to the administration requirements for managing the security plan.

B.5 ALCHEMY SERVER INTEGRATED SECURITY SETUP CONSIDERATIONS: CREATING MULTIPLE WEB SITES

The first step is to define and implement roles for your Alchemy Web browser users and their databases. This is accomplished through the Alchemy Server Configurator, see instructions in the Alchemy Server Administrator's Guide.

The deployment of Alchemy Web components and Alchemy databases on single or multiple computers and the setup requirements for service logons are the same with or without integrated security.

Alchemy Server Location	Web Engine Location	Web App Location	Database Location	Alchemy Server Service Logon Acct	LM service Logon Acct.	PM service Logon Acct.
1. Server1	Server1	Server1	Server1	Local System	Local System	Local System
2. Server1	Server1	Server1	Server2	Domain Acct *	Domain Acct	Domain Acct
3. Server2	Server2	Server1	Server2	Domain Acct	Domain Acct	Domain Acct
4. Server3	Server2	Server1	Server3	Domain Acct	Domain Acct	Domain Acct

*Domain Acct. is a standard Service Account that is typically added to allow services to logon with sufficient permissions to access resources across computer boundaries. The domain account must also be a member of the administrator's group on each computer.

The method of authentication, as defined in the IIS properties for the Alchemy Web Web site(s)), determines the groups/user IDs that will be added to role definitions in integrated security. Because integrated security is related to your Windows domain security configuration, the recommended IIS authentication method is Integrated Windows authentication. That means your client users are already defined in your domain security configuration. You may need to support both domain and anonymous users. This is accomplished by setting up different Web sites for each user type.

To create another Web site for anonymous user access:

1. Copy the Web Application folder from your Alchemy Web Application installation location to another location on the drive.
2. Change the name of the copied Web Application folder to a different, unique name, e.g., Anonymous.
3. Create a new virtual directory in IIS pointing to the new Web Application (Anonymous) folder.
4. Add a new domain user to represent anonymous users with adequate permissions to cross computer boundaries and access your 'public' databases.
5. In the new virtual directory you created, enable Anonymous access only and replace the IIS default anonymous user with the new domain user you added through the **Properties menu | Directory Security** tab.
6. Set identity impersonate in the web.config file in the new Anonymous folder. Open the web.config file in Notepad. Find the <!--AUTHENTICATION section. Add <identity impersonate="true"/> (this is case sensitive) and save the file.



For Windows 2003 Server, you must also set the <authentication mode="Windows"> to "None"

Remember to remove <identity impersonate="true"/> from the web.config file if you ever disable anonymous access for this web site.

7. Create a role in integrated security for the new anonymous domain user and associate 'public' databases with no sensitive information to the role.
8. Direct your anonymous users to these databases by providing a new URL for the new 'anonymous' Web site, e.g., `http://computername/anonymous`.
9. Disable Anonymous access for the original Web Service Web site. Client application users will then be authenticated in IIS by their computer logon user IDs. That user ID must be a valid domain user typically added to a group of users. These are the user IDs/groups that are assigned to the integrated security roles along with the databases that they can access.
10. Direct your "authenticated" users to the databases controlled by integrated security by providing them a URL as well, e.g., `http://computername/alchemyweb`.



To disable Anonymous access, remove the Anonymous check mark under Anonymous access and authentication control on the Directory Security tab in the properties of the Alchemy Web virtual directory.

11. Add the .rsf registered file type to the new virtual directory.
 - In the Computer Management console, under Internal Information Services, right-click the Default Web Site node and click **Properties** from the shortcut menu.
 - Click the HTTP Headers tab.
 - Under MIME type, click the **File Types** button.
 - Click **New Type**.
 - Enter "RSF" into the Associated extension field and "Alchemy Internal Viewer" into the Content type (MIME) field.
 - Click **OK** twice to return to the Web Site Properties dialog box.
 - Click **Apply** to save your settings
 - Click **OK** to close the dialog box.



Adding the .rsf registered file type to the default Web site forces all virtual directories beneath it to inherit this setting. If you want to restrict this setting to specific virtual directories, apply the setting to the specific virtual directory instead of the default Web site.

If your Alchemy Web Application computer is running Windows 2003 Server, you must grant the Everyone group write access to the Temp folder under your new Web Application (Anonymous) folder before Alchemy Web clients will be able to view files from this location. Alternatively, you can assign the Users group to the Temp folder under your new Web Application (Anonymous) folder and then give the Users group write permissions to the Temp folder.

To run the scheduled Windows task for the Alchemy Web Application cache cleanup utility in your new Web site, you need to share the IMRWViewer folder located under the new Web Application (Anonymous) folder. The share name for the IMRWViewer folder must be virtual directory name_ IMRWViewer, e.g., Anonymous_ IMRWViewer.

The logon user ID of the administrator using Alchemy Web Engine Configurator (MMC snap-in) to add Alchemy Servers, refresh, enable, and disable database lists from Alchemy Servers must be added to the administrator's role in integrated security with all databases added to that role. The Alchemy Web Engine services logon accounts must also be added to the administrator role.

Alchemy Web and Web Engine secure user logon credentials through encryption/decryption. The Alchemy Web Engine install program generates the required key file and places the file in the appropriate location when installing both Alchemy Web and Web Engine on a single computer. When installing Alchemy Web on one computer and Alchemy Web Engine on another computer, the key file, AuWSes.blb, generated and installed on the Web Engine computer in the WINNT\system32 directory must be copied to the WINNT\system32 directory of the computer where Alchemy Web was installed.

The key file generator utility, AuWSesGen.exe, is also provided for your use on-site to generate new key files in case of a damaged or compromised file. This utility is installed in the Web Engine directory and will generate an AuWSes.blb file in the directory where the AuWSesGen.exe is executed. You must move the newly generated AuWSes.blb file to the WINNT\system32 directory of the computer(s) where Alchemy Web Application is installed and to the Alchemy directory of the computer where the Alchemy Web Engine is installed.

USING SIMPLE INTEGRATION WITH ALCHEMY WEB

WHAT THIS CHAPTER COVERS

This chapter describes how you can integrate Alchemy Web functions with external third party applications and provides examples for you to use to create your own integration models. It contains the following sections:

- Using Simple Integration with Alchemy Web
- Simple integration examples

C.1 USING SIMPLE INTEGRATION WITH ALCHEMY WEB

Alchemy Web includes the ability to access certain Alchemy Web functions through external, third-party applications using a URL or link. This simple integration of Alchemy Web with external applications allows users to perform the following Alchemy Web tasks through an external application:

- Explore
- Search
- View
- Download

For each of the above functions, the user is required to pass the necessary parameter directly in the URL for the intended function. When received, the function in Alchemy Web parses the parameters from the Query string of the URL and executes the necessary function and renders the appropriate page according to the values passed. For example, if a user wants to execute a file download directly from Alchemy Web using an external application, she would execute the following URL in her web browser:

```
DownloadFile.aspx?Database=Alchemy_5_0a_Demo  
Database&ItemID=217&Document Title=myJPG.jpg
```

- Database is the name of the database to be searched for the item in Alchemy Web
- ItemID is the ID assigned to the item by Alchemy
- Document Title is the title of the document as entered into the Document Title profile field in the database in Alchemy

Following is a list of examples for each Alchemy Web function that supports simple integration with an external application.



Each parameter entered into the URL string is evaluated based on its position or order in the query string and not on the label identifier. The order of the parameters as specified in each example is required.

Each example represents a single URL and should be entered as such in the Address field of your Web browser.

C.2 SIMPLE INTEGRATION EXAMPLES

DOCUMENT PROFILE SEARCH

```
AlchemyWeb.aspx?Action=Search&Database=
DatabaseName1|DatabaseName2&SearchType=Document
Profile&SearchValue=mysearchcriteria&ProfileFieldName=Document Title
```



The Database parameter allows the user to specify multiple databases by delimiting each database with the bar (|) character. If the user wants to search all available databases in Alchemy Web, she must enter "All Databases" as the database name in the URL.

DOCUMENT CONTENTS SEARCH:

```
AlchemyWeb.aspx?Action=Search&Database=
DatabaseName1|DatabaseName2&SearchType=Document
Contents&SearchValue=mysearchcriteria
```



The Database parameter allows the user to specify multiple databases by delimiting each database with the bar (|) character. If the user wants to search all available databases in Alchemy Web, she must enter "All Databases" as the database name in the URL.

EXPLORE

```
AlchemyWeb.aspx?Action=Explore&Database=DatabaseName
```

VIEW ITEM

```
ViewItemPage.aspx?Database=DatabaseName&ItemID=217&Document Title=
myJPG.jpg
```

DOWNLOAD

```
DownloadFile.aspx?Database=Alchemy 5_0a Demo
Database&ItemID=217&Document Title=myJPG.jpg
```

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GLOSSARY

Access Control List (ACL)

List of databases under Alchemy Server control that have been mapped to a security role to restrict access. *See* also authorized databases.

Alchemy Advanced Server

The basis for applications requiring integrated document management, records management, compliance and workflow, along with fixed content management.

Alchemy Standard Server

The basis for fixed content management applications such as imaging and COLD.

authorized databases

Databases under Alchemy Server control that have been mapped to a security role. *See* also ACL

authorized license types

Alchemy license types that you assign to security roles to restrict user access to Alchemy applications and functionality. *See* also License Control List.

build

The process of indexing and copying files within a database to your selected media.

check in

Allows users to add revised documents back into the database. *See* also Library Services.

check out

Allows users to edit documents in a database. You can only check out an original document or the most recent version of a document. *See* also Library Services.

data port number

The specific communication channel that Alchemy Server uses to communicate with client computers. The default data port number that Alchemy Server uses is 3234.

database

Organized collection of information grouped together for ease and speed of search and retrieval.

database groups

Limits user access to specific folders within a database by limiting user access to specific folders within the databases assigned to the security role.

database settings

Controls what Alchemy functions and features are available to users assigned to a security role for specific databases mapped to that same security role. *See* also Role Based Access Control.

delete document versions

Allows users to delete all versions of a document from the published version and below in the document version hierarchy, including the original. Unlike the Roll back versions feature, deleting document versions does not rescind (cancel) the version of the document. *See* also Library Services.

document profile

Document profiles are defined at the document level for an individual document, or for a group of documents with a “batch profile.” A document’s profile may contain different information than the profile of the folder where it resides.

document title

A way for you to reference your files. The document title is identical to the file name unless you change it.

fields

There are two groups of fields available for use with profiles: system fields and user-defined fields. Fields are a key component of profiles; they are used for entering data, displaying information, and searching databases.

file details

The file creation/modification date and time, the file size, and the file attributes. You can choose to display the file details in the Viewer pane.

folder profile

Folder profiles are defined at the folder level to associate the same profile information with a group of documents contained in the same folder. A document’s folder profile can contain different information than the individual profiles of the documents it contains.

indexing

The process of building data structures for a database that contain the location of every word or other data item. Indexes allow searchers to locate items rapidly without searching through the entire body of data.

indexing characters

The character set used to recognize indexable words (e.g., A - Z, 0 - 9).

inherited role

Allows managers to possess or inherit the security roles of their employees without having to actually assign themselves to their employees’ security roles or map specific databases or database groups to the security role in which the manager is a member. When inheriting a security role, the manager inherits the databases mapped to the security role and any custom Database FCL settings associated with the databases mapped to the inherited security role.. *See* also Role Based Access Control.

integer number

A numeric field type. A number between -2,147,483,648 & 2,147,483,647. Allows for entering whole numbers.

Integrated Security

Feature of Alchemy Server that allows administrators to control user and group access to databases based on the organizational model of a company or other organization.

Library Services

Feature in Alchemy Advanced Server that allows users to edit the content and metadata of files contained in databases under Alchemy Server control.

License Control List (LCL)

List of Alchemy license types that have been assigned to a security role to restrict access to Alchemy applications and functionality. *See also* authorized license types.

license server name

The network name of the server machine used to license all Alchemy services, clients and extensions. Alchemy product licenses are controlled by the Alchemy Server service installed on the licensing server machine.

lookup field

A field containing data from a lookup table. You might want to use a lookup table to index a field if the number of possible values are small, or for consistent data entry. Documents can then be indexed by selecting a keyword from the drop-down list for that field.

lookup table

A table containing values for lookup fields. For example, if documents were indexed by department, a Department lookup table would contain values like Sales, Marketing, Engineering, and Admin. When indexing the documents, the user could choose from these values, or enter a different value.

maximum concurrent threads

The maximum number of active threads that the Alchemy Server service attempts to maintain. The default maximum is equal to the number of processors installed on the server machine. If you leave this option set to zero (0), the server uses the automatically calculated setting.

NOT

A Boolean connector used in search criteria. The query, CD-ROM NOT MULTIMEDIA, retrieves all documents mentioning CD-ROM except for documents that also mention MULTIMEDIA.

OR

A Boolean connector used in search criteria. When OR is used between two search words in a query, it retrieves of all documents that mention either of the two words.

overwrite document

Allows the user to overwrite (replace) the original document or previous version when the modified document is checked in. *See also* Library Services.

page map size

Determines the limit amount of change/update tracking Alchemy Server performs on each file in each database that the server controls. The default value is to track the last 1000 changes/updates made to each file in the database.

page map delta

Determines the percentage of the page map that the server clears when the server reaches the page map size limit. The default page map delta is 20%. This value means that the server deletes 20% of the oldest changes/updates from the page map when the server reaches the limit.

parentheses

An element of a Boolean logic search criteria used to group search criteria together and alter their precedence. For example, the query CAR AND (BOAT OR PLANE) is distinct from (CAR AND BOAT) OR PLANE.

pool manager retries

The number of times an Alchemy client can attempt to access a user thread from the Alchemy Web Engine before the request is denied.

pool manager size

The number of user requests (thread) that can be made to the Alchemy Web Engine at the same time. The minimum number is 2. The maximum number is 64. A value of 1 can be used when developing external applications with the Alchemy Web SDK Toolkit.

precision

A setting for Floating Point Number fields types that allows for rounding numbers to the specified number of decimal places. Numbers greater than or equal to five are rounded up to the next number.

profile

Summarized data used to attach search retrieval keywords to folders and files contained in databases. The data is displayed in fields, which are viewed with their associated folders and/or files.

publish document version

Allows users to designate (declare) the original or any version of a document in a database as the final draft of the document for use. *See also Library Services.*

query profile

Database designers can create a custom Query Profile that includes only specific fields for searching. When the Query Profile is displayed in the Search dialog box, the Document Contents, Document Profile, Folder Profile, and Settings Tabs are hidden. A searcher only sees the Query Profile and the fields it contains. A well designed Query Profile can help to simplify the search process by limiting a searcher's choices in the Search dialog box.

Role Based Access Control

Alchemy Advanced Server feature that allows administrators to set user specific access to over 140 unique end user functions in Alchemy.

role settings

Controls what Alchemy functions and features are available to users assigned to a security role.

roll back document version

Allows users to rescind or cancel a version of a document in the database. When you roll back a version of a document, you remove that version from the version hierarchy for the document. The remaining versions of the document are renumbered accordingly. *See also Library Services.*

saved query

The Saved Query feature in Alchemy Web allows you to save up to ten search queries and their associated settings for queries that you use frequently to search files contained within Alchemy databases. The Saved Search Query feature also allows you to edit your saved search queries to accommodate your changing needs and delete and save different search queries as your needs dictate. You access the Saved Query feature in the Search pane in the Simple and Advanced Search Views.

search field

(Also known as profile fields) Search fields are used in Simple Search and Advanced Search Views to enter search words for an item search.

search result limit

The maximum number of items that can be returned from an Alchemy client search.

search results

The list of documents found to match a query.

search time limit

The amount of time, in minutes, that a search can be conducted by an Alchemy client without returning a result before the search is cancelled. This value should be set to a lower value than the session timeout limit.

service port number

The specific communication channel used to remotely communicate with the Alchemy Server MMC console, the Performance Monitor, and server COM API.

thread pool size

Determines the number of worker threads the Alchemy Server creates. The default thread pool size is twice the number of processors installed in the server machine. If you leave this option set to zero (0), the server uses the automatically calculated setting.

TOC limit

The maximum number of items that are returned to populate the TOC of a an open database in the client browser.

undo document check out

Allows users to cancel their document check out. When you undo a check out, any changes you made to the document are lost and the document is returned to its previous state before it was checked out. *See* also Library Services.

view document versions

Allows users to view all versions of a document in the Alchemy client Tree view. *See* also Library Services.

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