Converting to the Inmagic DB/Text for SQL Platform

11/02/11

Contents

Introduction

This document is intended for customers who are moving from the non-SQL platform to the SQL platform of Inmagic® *DB/TextWorks*® and *DB/Text*® *WebPublisher PRO*.

The Inmagic® *DB/Text for SQL* product includes the following components:

- *DB/TextWorks for SQL* (the desktop component), and
- *WebPublisher PRO for SQL* (the Web component)

This guide explains how to convert your existing non-SQL textbases and menu screens (and, if you have WebPublisher PRO, your non-SQL Web screens, forms, and other Web-related files) for use on the SQL platform.

Why You Must Convert Textbases, Menu Screens, and Web Files

Instead of using a proprietary file system as the DB/TextWorks product does, DB/Text for SQL uses Microsoft SQL Server as its data store.

Because data is stored inside SQL Server, your existing textbases and Web-related files must be converted for use with SQL Server.

DB/TextWorks for SQL maintains the familiar DB/TextWorks interface; only the back-end platform has changed. (There are some differences in the interface; for example, the SQL platform includes the Administration program, which provides SQL-specific options.)

Before You Begin

Before you start the conversion process:

1. **Back up your existing textbases**. We strongly recommend that you back up your existing textbases. You can either do this manually now, or you can allow the conversion to do an automatic backup as part of the conversion process (explained in the steps that follow).

2. **Review the DB/Text for SQL Support Matrix**. The Support Matrix lists system requirements and the supported versions of Microsoft SQL Server. It is available via the Product Documentation link on the Customer Extranet page.

3. **Install DB/TextWorks for SQL**. Follow the instructions in the *Inmagic DB/Text for SQL Installation and Upgrade Instructions*, as if you were doing a new installation (not an upgrade). We recommend that you accept the default installation folder (`C:\Program Files\Inmagic\Content Server`). This will ensure that he SQL-based application is in a separate location from your existing non-SQL version.

4. **Install WebPublisher PRO for SQL**. Follow the instructions in the *Inmagic DB/Text for SQL Installation and Upgrade Instructions*, as if you were doing a new installation (not an upgrade). We recommend that you accept the default installation folder (`C:\Program Files\Inmagic\ICSWeb`), to ensure that the SQL-based application is in a separate location from your existing non-SQL version.

About the Documentation

For a list of the documentation available for DB/Text for SQL, please see its README file.

You can access documentation via the Product Documentation link on the Customer Extranet page. Additionally, please check the Documentation subfolder of the installation folder for each installed component.

Contacting Inmagic

For help, you can contact Inmagic or your local Inmagic dealer.

If you have a maintenance agreement, please have your customer ID ready, and try to be at your computer when you call. If that is not possible, note exactly what you were doing when you encountered the problem, the exact text of any error messages you received, and your software version number and serial number (use the **Help>About** menu to look it up). If you do not have a maintenance agreement, you can contact Inmagic Customer Service to purchase one.

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If your message is intended for a particular person at Inmagic (for example, a Technical Support representative who is expecting the message or files), please include the name of that person in the subject and in the message.

Using the Administration Program to Convert to the SQL Platform

To convert existing textbases, menu screens, and Web components to the SQL platform, you will use the DB/Text for SQL **Administration** program (InmCSAdmin.EXE), as explained in this document.

Note: For information about using the Administration program to perform tasks other than those detailed in this guide, please see the *Inmagic DB/Text for SQL Administrator's Guide* and the online help.

There are three main operations for moving to the DB/Text for SQL platform, each with its own command on the **Manage Upgrades>Convert from DB/Text** menu in the Administration program:

- **Textbases.** This command starts a wizard that takes you through the conversion process. You can convert multiple textbases at once, as long as the textbases are in one folder. If they are not, you must run the wizard for each folder containing textbases.

- **Menu Screens.** Convert menu screens so they can be opened on the SQL platform.

- **Web Components.** You only need to use this command if you are using WebPublisher PRO. This command converts Web components (HTML query screens, INI files, script files, and so on) for use on the SQL platform.

The following sections explain these operations.

Converting Textbases

To convert your existing textbases for use on the SQL platform, follow the instructions below.

Your new textbases will have the same names as your original textbases, but will have different extensions. For more information, see "What Will Be Different?" on page 18.

Note: The wizard can convert multiple textbases at once, if they are in the same folder. If the textbases are in different folders, you must run the wizard (**Manage Upgrades>Convert from DB/Text>Textbases**) once for each folder containing textbases.

To convert textbases

1. On the machine where DB/TextWorks for SQL is installed, click the Windows **Start** button and choose **Programs>Inmagic Applications>DBText for SQL>Administration (TW-SQL)**.

2. Choose **Manage Upgrades>Convert from DB/Text>Textbases**.

3. In the **Select Textbases to Convert to DB/Text for SQL** dialog box, do the following:

   a. Navigate to the folder containing the textbase(s) you plan to convert. You must have Full Control access to this folder.

   b. Select the textbase(s) you want to convert, and click **Open**.

   Note: If any of the textbases has a Master password, you will be prompted for it during the conversion process.

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4. The **Convert Textbases from DB/Text: Selected Textbases** dialog box lists the selected textbases. Review the list, then click **Next**.
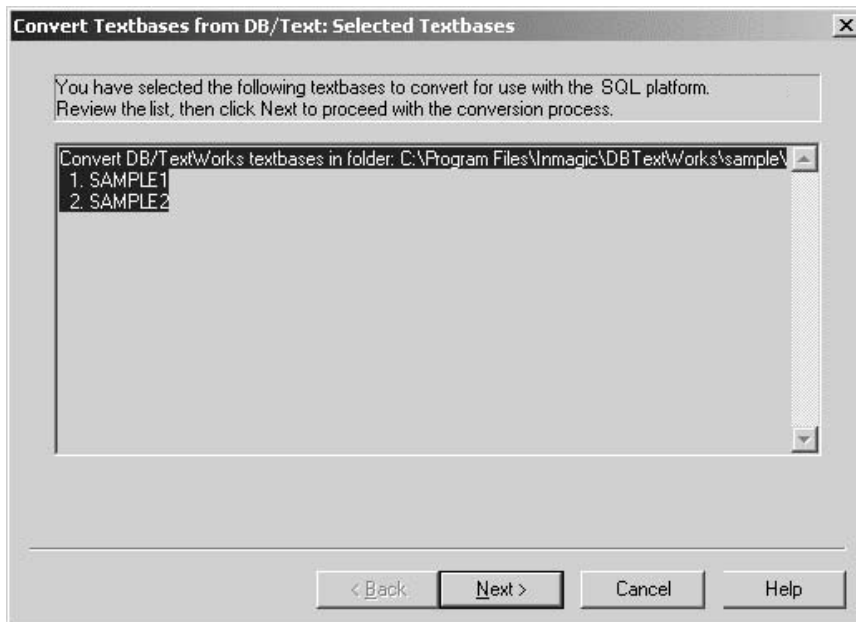
5. In the **Convert Textbases from DB/Text: Specify Location for Converted Textbases** dialog box, use the **Location** field to specify the location for the converted textbases.

   Important! We strongly recommend that you place the converted textbases in the same folder as your existing non-SQL DB/TextWorks textbases.

   - **Specifying the same location as your existing textbases**: This is the default. The original files will not be overwritten, because the new files will have different extensions (for example, .TBA versus .CBA). Later, you can use the **Manage Textbases>Delete Textbase** command in the Administration window to delete the original textbases, when you are sure that your new textbases are up and running on the SQL platform. Putting the converted textbases in the same location ensures that file references within the textbases and menu screens remain valid. Examples of file references include image or document names, thesaurus links, linked textbase names, and textbase references in menu screens.

   - **Specifying a different location**: If you specify a different location and your textbases have image references that consist of just a filename, you will have to copy the image files to the new location or re-direct the references to the proper location. You may also need to adjust menu screens, as well as access to linked textbases, thesaurus textbases, and so on, after the conversion.

   After specifying a location, click **Next**.

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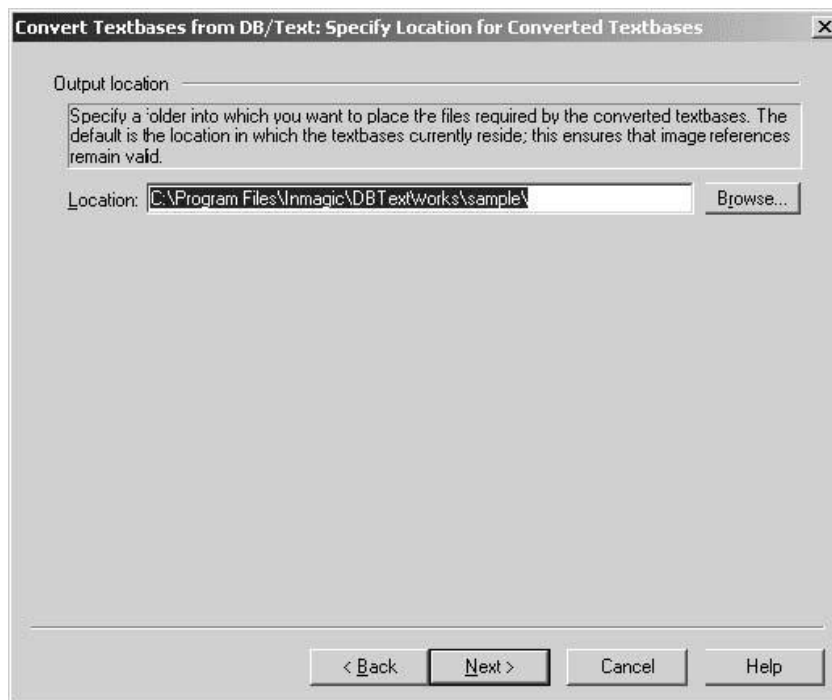
6. If you are using Windows Authentication with your DB/Text for SQL application, the **Convert Textbases from DB/Text: Determine When to Set Textbase Security** dialog box opens. Select one of the following options, then click **Next**.

- **Specify textbase security settings now (applied to all selected textbases).** Select this option if you want to set security for all of the converted textbases. You will not be able to give a particular user or group more access to one textbase than another. When you click **Next**, you will have the opportunity to specify security settings.

- **Specify textbase security settings later (individually for each textbase).** If you select this option, no textbase security will be set on the converted textbases. After the conversion process is complete, before users can access the textbases, you must set security for each textbase by choosing **Configure SQL Server>Manage Security>Assign User Rights to Textbase** in the Administration program.
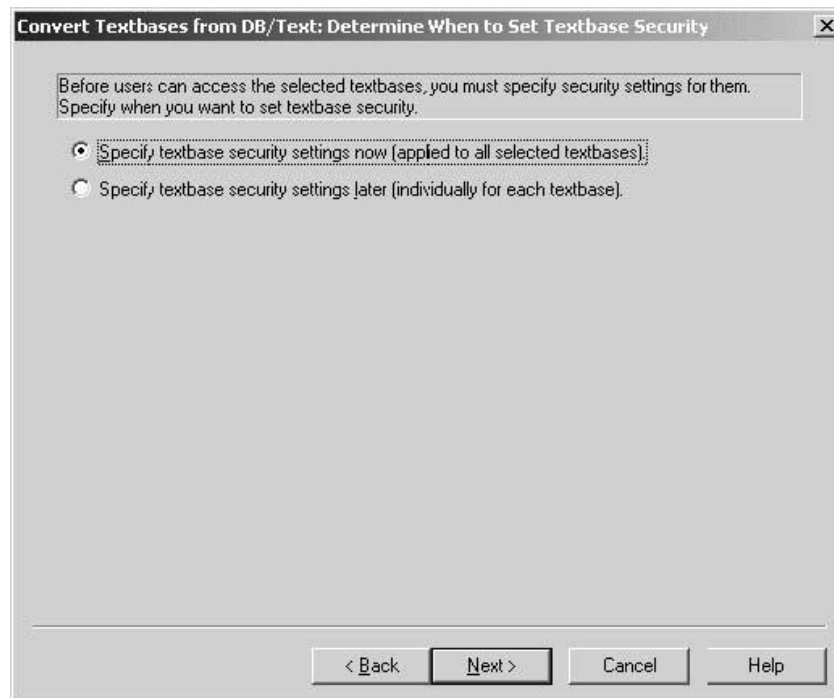
7. If you selected **Specify textbase security settings now (applied to all selected textbases)** in the previous step, the **Convert Textbases from DB/Text: Add User Rights to Textbases** dialog opens.
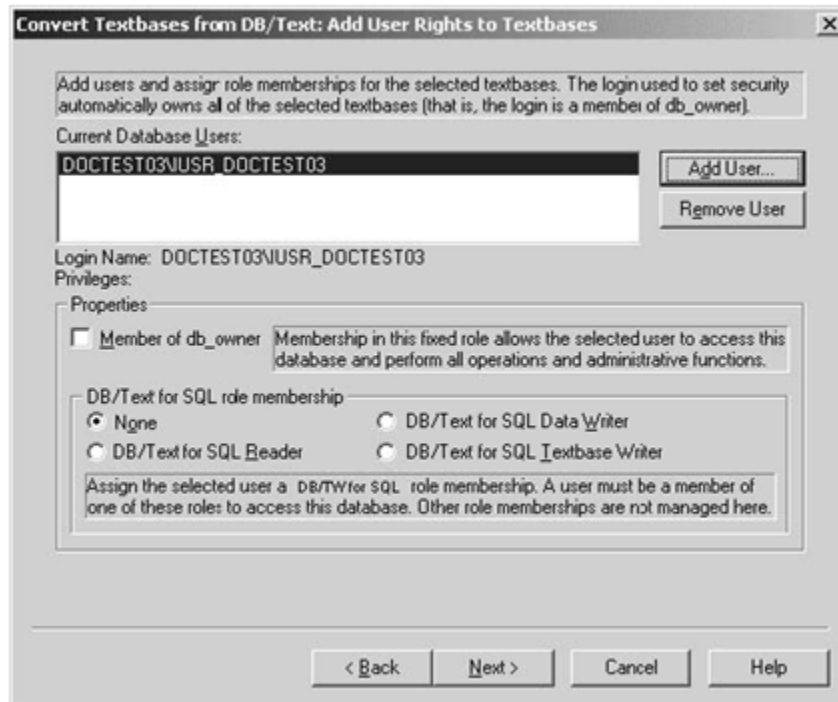
Select security settings to apply to all of the textbases that will be converted:

a. Click the **Add User** button to open the Add Database User dialog box and select a user who will be able to access the textbases from the Login Name drop-down list, then click **OK**.

   Note: The login you use to convert the textbases will not appear in the Add Database User dialog box because it is automatically a member of **db_owner** for all of the converted textbases. For other user names to be visible, the user/group must exist in the Windows domain (of which SQL Server is a member) and have a login on the SQL Server.

b. In the **Current Database Users** list, select the user/group for which you want to set security.

c. [Optional] If you want the selected user or group to be able to edit the structure of the textbases, check **Member of db_owner** under **Properties**. If you check this box or if the user/group has sysadmin rights, then the options in the next step will be disabled.

d. Select a **DB/Text for SQL role membership** option to assign the selected user/group membership to the appropriate role. Note that a user/group can only be assigned one DB/Text for SQL role.

   ◾ **None.** The user name does not have membership to any DB/Text for SQL role and cannot access any of the textbases.

   ◾ **DB/Text for SQL Reader.** The user name has Read-Only access to the textbases. The user name has Select permission in SQL tables.

   ◾ **DB/Text for SQL Data Writer.** The user name can search and modify record information (search for, add, edit, and/or delete records) but cannot modify validation and substitution lists.

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- **DB/Text for SQL Textbase Writer.** The user name can search and modify record information (search for, add, edit, and/or delete records) and update validation lists when overriding content validation (if the appropriate options are selected in the Edit Textbase Structure dialog box).

   e. Repeat the previous step for each user/group that should be allowed to access the textbases.

   f. Click **Next**.

8. In the **Convert Textbases from DB/Text: Specify Location for Textbase Backup Files** dialog box, check or clear **Automatically back up the selected textbases** to specify whether you want the conversion process to automatically back up your existing DB/TextWorks textbases. If you check this box (the default), the **Location** box is enabled so that you can specify the path to the folder in which you want the textbase backup files to be placed.

   Important! We strongly recommend that you automatically back up the selected textbases.

   Click **Next**.
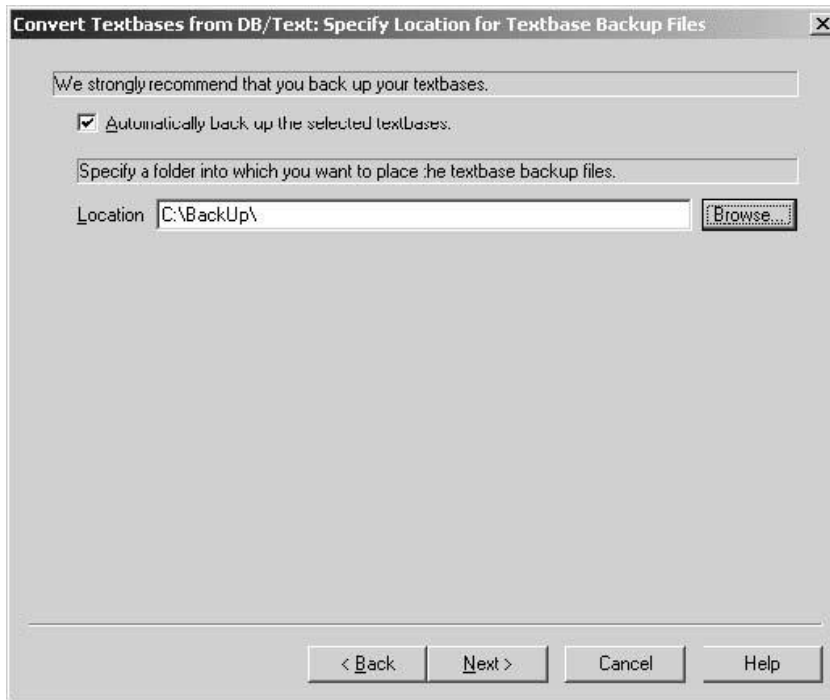
9. In the **Convert Textbases from DB/Text: Specify Record Buffer and Temporary Files Location** dialog box, enter the following information, then click **Next**:

- **Maximum records to buffer**: Enter the maximum number of records you want prepared before loading them into the SQL Server database. This value represents a compromise between performance and resource consumption. Larger numbers often result in faster loads but tend to consume more disk space in the temporary file path. The default value is 30000.

- **Temp file path**: Enter the path to a public folder on the network where you want to store temporary files needed for the load operation. This location must be accessible from both this computer and the SQL Server (using the UNC format \\server\share\...), and the SQL Server account must have Read/Write/Delete access to the folder.

  Note: The **Temp file path** option is enabled only if the SQL Server is on a machine other than the one you are currently using.
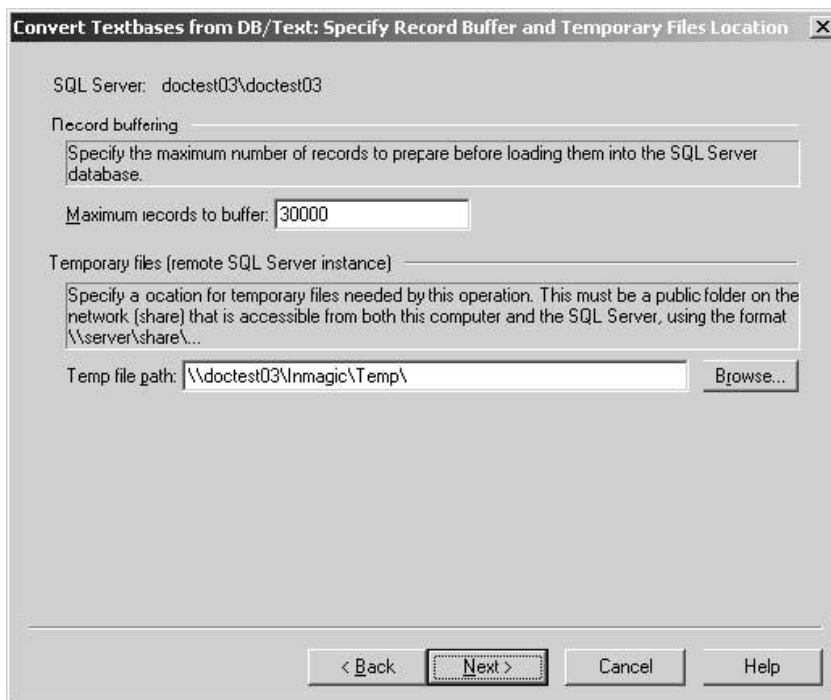
10. The **Convert Textbases from DB/Text: Confirm Settings** dialog box opens so that you can review the settings you specified for the conversion.

After reviewing the information, click the **Finish** button to begin the conversion.
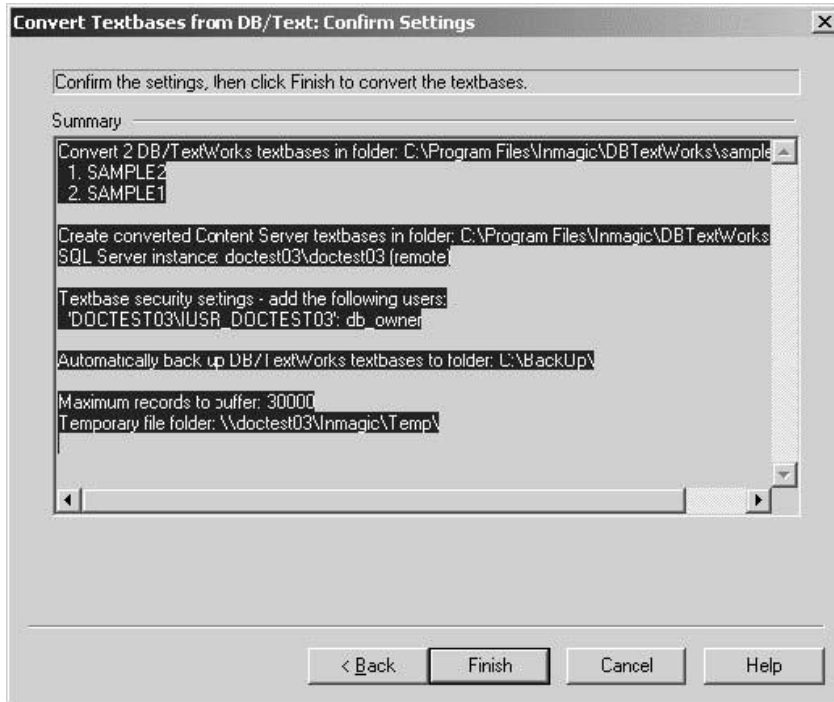
11. The **Convert Textbases from DB/Text: Operation Status** dialog box appears while the process completes. The progress bars and the Operation log show the status of the conversion process. This information (including whether any textbases did not convert correctly and why) is logged to the CSUpdates.LOG file, which is located in the same folder as your converted textbases. Review this information to ensure that all textbases were converted as expected, then click **Close**.

Note: To cancel the process, click the **Stop Convert Textbases Operation** button that appears while the operation is running.
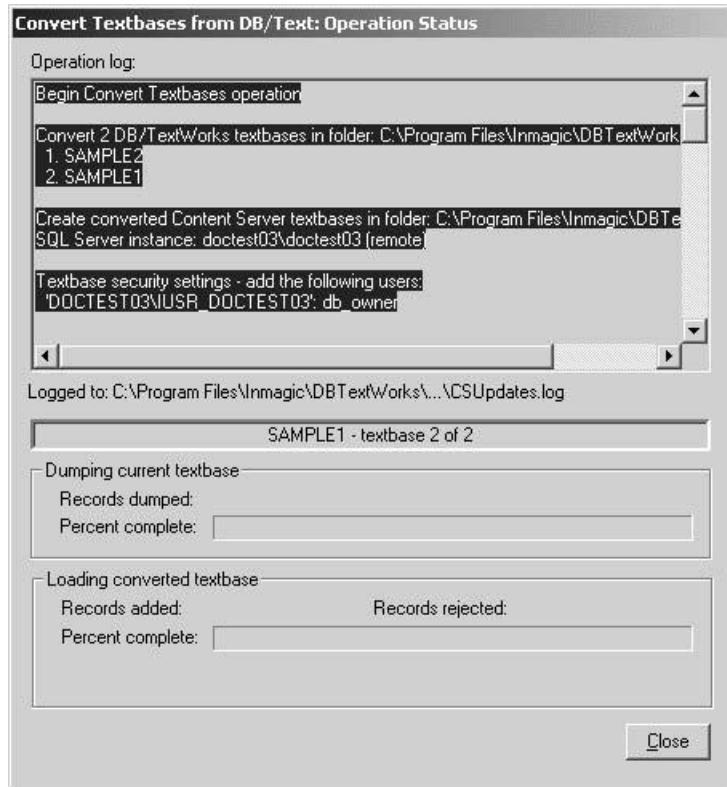
Important! If your textbases are located in more than one folder, be sure to choose **Manage Upgrades>Convert from DB/Text>Textbases** and repeat the above steps for each different location.

Your textbases are now ready for use on the DB/Text for SQL platform.

Converting Menu Screens

Follow the instructions below to convert existing menu screens for use on the SQL platform.

The conversion process redirects the textbase boxes on your menu screens to point to your new, converted textbases that have the same name but a different extension (that is, .CBA instead of .TBA).

You can convert menu screens either before or after you convert textbases. However, the converted menu screens will not work until you have successfully converted the textbases to which they point.

Important! If your converted textbases are not in the same location as your original DB/TextWorks textbases, the converted menu screens will not work properly. In this case, you must open your menu screens in the Menu Screen Designer and redirect any textbase boxes to point to the new locations of your textbases. For more information see, "My Converted Textbases are in a New Location" on page 19.

To convert menu screens

1. On the machine where DB/TextWorks for SQL is installed, click the Windows **Start** button and choose **Programs>Inmagic Applications>DB/Text for SQL>Administration (TW-SQL)**.

2. Choose **Manage Upgrades>Convert from DB/Text>Menu Screens**.

3. Use the **Select Menu Screens to Convert to DB/Text for SQL** dialog box to select the menu screen(s) you want to convert. The menu screens must all be in the same folder.

4. In the **Convert Menu Screens from DB/Text: Confirm Settings** dialog box, review the list of menu screens that will be converted, then click **Finish** to confirm the information and start the conversion.

5. The **Convert Menu Screens from DB/Text: Operation Status** dialog box appears while the process completes. The progress bars and the Operation log show the status of the conversion process. This information (including whether any menu screens did not convert correctly and why) is logged to the CSUpdates.LOG file, which is located in the same folder as the menu screens. Before you close the dialog box, we recommend that you review this information to ensure that all of the conversions completed as expected.

Note*:* To cancel the process, click the **Stop Convert Menu Screens Operation** button that appears while the operation is running.

6. If you want to convert additional menu screens that are in a different folder, repeat this procedure for each folder that contains menu screens that you want to convert.

You have now completed the menu screen conversion process.

Converting WebPublisher PRO Components

If you are using the non-SQL version of the optional WebPublisher PRO application, you need to convert your existing Web screens, forms, and other Web-related files for use on the SQL platform.

You can convert Web components and textbases in any order. However, you will not be able to use the Web components until the textbases have been converted (see "Converting Textbases" on page 7).

WebPublisher PRO for SQL requires the use of a virtual directory named **ics-wpd**, which is mapped to the WebPublisher PRO for SQL installation folder (`C:\Program Files\Inmagic\ICSWeb`, by default). The ics-wpd virtual directory should already be created and have the appropriate access rights assigned, as described in the *Inmagic DB/Text for SQL Installation and Upgrade Instructions*.

The conversion process copies your existing Web screens, forms, script files, and other Web-related files, converts them for use with the SQL platform (for example, it redirects Web query screens to the new virtual directory), then places them into the new installation folder structure. The original screens, forms, script files, and so on remain intact in their original locations. They are not overwritten. After your new system is up and running on the Web, you can delete the **dbtw-wpd** virtual directory structure and files.

Important! The conversion process will only convert items that are located within the **dbtw-wpd** virtual directory structure (which is mapped to your WebPublisher PRO installation folder structure). If you keep your Web-related files outside of this folder structure, either copy them into the dbtw-wpd virtual directory for the duration of the conversion, or convert them manually. For details on how to do this, see "My Web Screens/Forms are Located Outside the WebPublisher PRO Folder Structure" on page 19.

To convert WebPublisher PRO components

1. On the machine where WebPublisher PRO for SQL is installed, click the Windows **Start** button and choose **Programs>Inmagic Applications>DB/Text for SQL>Administration (WP-SQL)**.

2. Choose **Manage Upgrades>Convert from DB/Text>Web Components** to access the dialog box shown below.
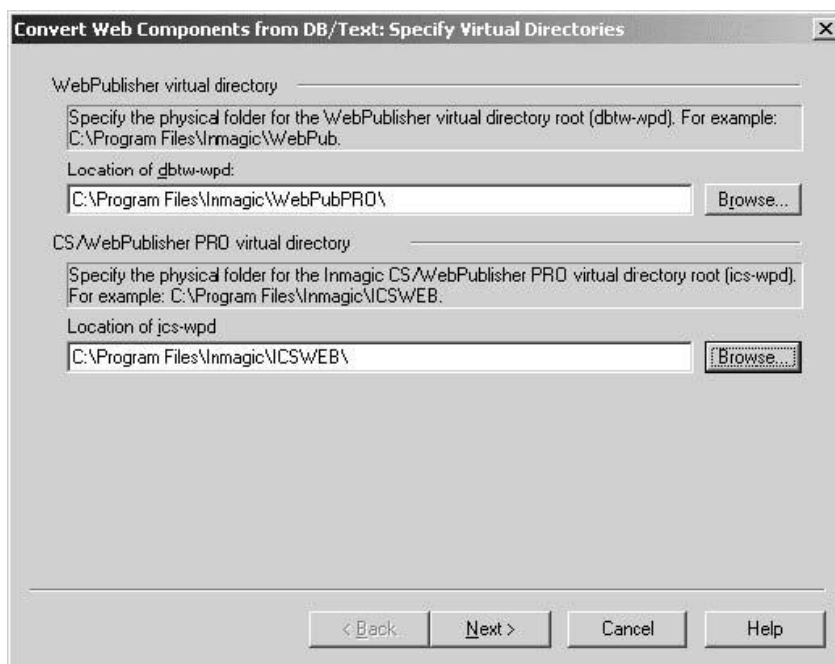
3. Use the **Convert Web Components from DB/Text: Specify Virtual Directories** dialog box to

specify the physical path to each virtual directory root. This is the folder to which that virtual directory is mapped. Based on your operating system, these paths may be read from Internet Information Services (IIS) and already appear. See the screen shot below.

- In the **Location of dbtw**-**wpd** box, enter the path to the physical folder for the virtual directory root used with the non-SQL version of WebPublisher PRO. For example, if you accepted the default during installation, the physical path to the WebPublisher PRO virtual directory root (dbtw-wpd) is `C:\Program Files\Inmagic\WebPubPRO`. You can click the **Browse** button and navigate to this location.

- In the **Location of ics**-**wpd** box, enter the path to the physical folder for the virtual directory root used with WebPublisher PRO for SQL. For example, if you accepted the default during installation, the physical path to the new virtual directory root (ics-wpd) is `C:\Program Files\Inmagic\ICSWeb`. You can click the **Browse** button and navigate to this location.

Click **Next**.

4. The **Convert Web Components from DB/Text: Confirm Settings** dialog box opens so that you can review the list of subfolders containing Web-related files that will be converted. When you are done reviewing the information, click **Finish** to start the conversion process.

5. In the **Convert Web Components from DB/Text: Operation Status** dialog box, wait while the conversion completes. The Operation log shows the status of the conversion. This information (including whether any Web files did not convert correctly and why) is logged to the CSUpdates.LOG file in your user file path. We recommend you review this information to ensure that all of the files were converted as intended.

Note: To cancel the process, click the **Stop Convert Web Components Operation** button that appears while the operation is running.
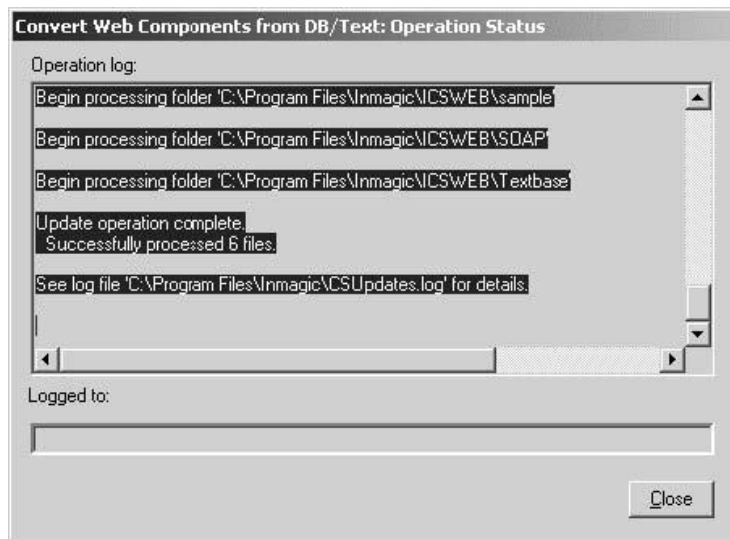
What Will Be Different?

The following list describes the main changes that you will see after upgrading DB/TextWorks and WebPublisher PRO to the SQL platform.

- There is a new Administration program with its own executable (InmCSAdmin.EXE).

- There are fewer mandatory textbase files. These files, which reside outside of SQL Server, all have .C*XX* extensions (instead of .T*XX* extensions):
  - The .CBA file (formerly .TBA) contains public forms, query screens, sets, and skeletons.
  - The .CAC file (formerly .ACF) controls textbase access.
  - The .CBS file (formerly .DBS) contains the textbase structure definition.

- User files have a .CBU extension instead of a .TBU extension.

- Menu screen files have a .CBM extension instead of a .TBM extension. (The DBText.TBM file that is used by default if no other menu screen is specified is called InmCSrv.CBM.)

- The records, indexes, and textbase lists (validation lists, record classes, and so on) are stored inside SQL Server. You cannot access these files using Windows Explorer.

- If you are using Windows Authentication, you must apply security settings to the control database on the SQL Server and to each textbase. For more information about security, see the *Inmagic DB/Text for SQL Administrator's Guide*.

- The DBText.INI file is called InmCSrv.INI.

- The deferred indexing feature is no longer necessary. Instead, a new **Set Exclusive Textbase Access/Set Shared Textbase Access** command lets you toggle between setting exclusive access and setting shared access.

- Several commands on the Manage Textbases menu have moved to the Administration program. They are: **Recover Textbase**, **Check Textbase**, **Copy Textbase**, **Rename Textbase**, and **Delete Textbase**.

- A new command appears on the Manage Textbases menu: **Clear Textbase Record Locks**. This clears the locks on any locked records (for example, locked records may occur if a power outage happens while records are being edited).

- The following commands now use a fast load mechanism and permit you to specify buffer size:

  In DB/TextWorks for SQL: **Manage Textbases>Load New Textbase** and **File>Import** (using the Express Import option).

  In the Administration program: **Manage Textbases>Recover Textbase**, **Manage Textbases>Load New Textbase**, and **Manage Upgrades>Convert from DB/Text>Textbases**.

- Express Import now requires exclusive textbase access.

- The following are no longer available in the Options dialog box (**Tools>Options**):

  Ignore accents on extended characters. To ignore accents for searches, set the SQL collation appropriately, either during the SQL Server installation or by using the SQLCollation parameter in the InmCSrv.INI file. For information about the SQLCollation parameter, see the online help.

  Read/write extended characters in MS-DOS format. Extended characters are always written in Windows format.

- If you installed WebPublisher PRO for SQL, your virtual directory is now called ics-wpd and the DBTWPub.INI file is now called ICSWeb.INI.

Manually Converting Menu Screens and Web Components

This section is only for customers whose DB/TextWorks and/or WebPublisher PRO configurations do not meet the criteria needed to have their menu screens and Web components converted using the Administration window. Perform the applicable steps in this section if either of the following is true:

- When converting your DB/TextWorks textbases, you used the **Manage Upgrades>Convert from DB/Text>Textbases** command in the Administration window, but did not put your converted textbases (with the new .CBA extension) in the same location as your original ones (with the .TBA extension).

- You have WebPublisher PRO, and your Web screens, forms, script files, and so on are located in folders outside of the WebPublisher PRO installation folder.

My Converted Textbases are in a New Location

If you converted your DB/TextWorks textbases and placed the new textbases in a different location from the original textbases, you will not be able to properly convert menu screens using the **Manage Upgrades>Convert from DB/Text>Menu Screens** command.

Instead, you must manually convert each menu screen that accesses these textbases.

Menu screens used on the DB/TextWorks for SQL platform must have a .CBM extension. Your existing DB/TextWorks menu screens have a .TBM extension.

Important! Before manually converting menu screens, you must have already converted the textbase(s) to which they point.

To manually convert a menu screen

1. Start DB/TextWorks for SQL.

2. Choose **Menu Screens>Design** to open the Menu Screen Designer.

3. In the Open Menu Screen dialog box, select **Open an Existing Menu Screen File** and click **OK**.

4. In the Open Inmagic Menu Screen File dialog box, select **DB/TextWorks Menu Screen Files (*.tbm)** from the **Files of type** drop-down list.

5. Select the .TBM file you want to convert, and click **Open**.

6. For menu items that open a textbase, use the Textbase Box Properties dialog box to specify the converted textbase (which has the same name as the original textbase, but with a .CBA extension). You may also want to replicate any initial actions and/or initial elements.

7. For menu items that open another menu screen, use the Menu Screen Box properties dialog box to specify the converted menu screen (which will have .CBM extension).

8. Save the menu screen (choose **Menu Operations>Save Menu Screen As**). Specify the name and location for the menu screen file on the Save Inmagic Menu Screen File As dialog box, then click **Save**. The resulting file will have a .CBM extension

My Web Screens/Forms are Located Outside the WebPublisher PRO Folder Structure

If your existing WebPublisher PRO query screens and edit forms are located in folders outside of the WebPublisher PRO folder structure, you must manually convert them before you can use them on the

DB/TextWorks for SQL platform with WebPublisher PRO for SQL.

This means that each Web query screen and edit form must be re-exported to HTML using your new software so that the appropriate files and virtual Web names are referenced.

Note: Before you manually convert screens and forms, you should use **Manage Upgrades>Convert from DB/Text>Web Components** command to convert any other files that may reside within the WebPublisher PRO folder structure.

To manually convert WebPublisher PRO query screens

1. Start DB/TextWorks for SQL and open the textbase whose query screen you need to re-export.

2. Choose **Search>Design Query Screen**.

3. In the Open Query Screen dialog box, do the following:

    a. From the Start With list, select **Existing Query Screen**.

    b. From the Currently Saved list, select the Web query screen you want to convert.

    c. Click **OK**. The query screen opens in the Query Screen Designer.

4. Choose **Screen Operations>Export Query Screen to HTML**.

5. A message box asks if you want to use Cascading Style Sheets (CSS) to preserve formatting. Click **Yes** to preserve box position; click **No** if you want the software to use simple HTML to lay out the screen (for example, all boxes will appear left-justified).

6. In the Save File As dialog box, enter a name for the Web screen, then click **Save**.

7. Click **OK** to dismiss the completion message.

To manually convert WebPublisher PRO edit forms

Note that only edit forms that were exported to HTML must be converted. All other forms are saved within the textbase.

1. Start DB/TextWorks for SQL and open the textbase whose edit form you need to re-export to HTML.

2. Choose **Display>Design Form**.

3. In the Open Form dialog box, do the following:

    a. From the Start With list, select **Existing Form**.

    b. From the Currently Saved list, select the Web edit form you want to convert.

    c. Click **OK**. The form opens in the Form Designer.

4. Choose **Form Operations>Export Editing Form to HTML**.

5. A message asks if you want to use Cascading Style Sheets (CSS) to preserve formatting. Click **Yes** to preserve box position when the edit form is displayed on the Web. Click **No** to have the software use simple HTML to place elements on the edit form (that is, boxes will be left-justified, box labels will appear on top rather than to the left, and so on).

6. In the Save File As dialog box, enter a name for the Web edit form, then click **Save**.

7. Click **OK** to dismiss the completion message.

Manually Converting Other Web-related Files

Besides Web query screens and edit forms that are exported to HTML, there are other Web-related files that must be converted before you can use them on the DB/Text for SQL platform. Examples include XML applications, forms saved within textbases, and files that use canned searches within them.

You only have to convert these files by hand if either of the following is true:

- Your converted textbases are not in the same location as your original textbases. If this is the case, you must update the ICSWeb.INI file to include the path to the converted textbases.

- The Web files in question (for example, XML applications) are not located within your existing WebPublisher PRO folder structure. If this is the case, use a text editor (such as Microsoft Notepad) to make the following text substitutions:

DB/TextWorks	DB/TextWorks for SQL
dbtw-wpd	ics-wpd
DBTWPub.DLL	ICSWPPro.DLL
DBTWPCGI	ICSPCGI
iwpp-edit.ASP	icsw-edit.ASP
jscript/dbtw-	jscript/ics-

For example, replace instances of "DBTWPub.DLL" with "ICSWPPro.DLL".

Important! Check any raw HTML you may have added to reports you designed for Web use. (The easiest way to make this change in form definitions is to export all of them to a single file, delete them, use a text editor to make these changes globally, and re-import them.)

You have now completed the conversion process.

This is the last page in the document.