



DOCUMENTS 4

EXTERNAL SEARCHES USING QUICKVIEW

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1. Introduction

DOCUMENTS QuickView allows automatic search via externally created links. In doing so, both archived files and current processes can be displayed, depending on the corresponding user's permission.

Combinations of searches in current and archived processes are also possible by specifying the parameters in the URL. Only the fields that are provided via the advanced search mask in **DOCUMENTS 4** are available as search fields.

In combined searches (archive and current processes), the search parameters must therefore exist in both structure types. If this is not the case, a full text search can usually be performed.

Three search results are available:

- The **DOCUMENTS** file will be directly opened in case of exactly one hit
- The hit list will be displayed in case of more than one hits
- The advanced search mask will be displayed if no hit is found.

Additionally, **DOCUMENTS Quickview** specifically allows opening folders. Specifying the corresponding parameter enables users to directly go to the Inbox, switch to the overview or advanced search, or directly create new **DOCUMENTS** files.

Moreover, you can automatically display the ***DOCUMENTS hit tree*** when the necessary requirements are met:

- The ***DOCUMENTS hit tree*** must be globally enabled
- ***Multiple sorting*** must be globally enabled
- Search must return a ***hit list*** (more than one hit)

When launching **DOCUMENTS Quickview**, you need to specify user name and password by default; however, when using ***Once login*** or ***Single sign-on (SSO)***, this information and, with it, renewed login, is redundant.

When searching in **EASY ENTERPRISE.x (EE.x)** archives, a certificate that replaces the necessary login parameters can also be used.

2. Required Parameters for External Calls

The URL structure must start with the following parameters:

```
http://<DOCUMENTS Server>:<DOCUMENTS server port>/jsp/qv?pri=<DOCUMENTS principal>
```

or, when using SSL:

```
https://<DOCUMENTS Server>:<DOCUMENTS server port>/jsp/qv?pri=<DOCUMENTS principal>
```

Please refer to the corresponding [DOCUMENTS 4](#) documentation for information on setting up the SSL protocol. Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit
```

You need to make sure that you specify the [DOCUMENTS 4 Server](#) exactly as it was defined in the [DOCUMENTS Manager](#) on the

Server settings -> System parameters -> Server settings -> Host name of Portal Server

menu item. If this is not the case, the images will not be displayed or displayed incorrectly, or other functions will not be correctly available.

If you do not use the standard [DOCUMENTS 4](#) installation but the deployment for the JBOSS application server, this must be additionally specified. Sample URL:

```
http://127.0.0.1:8080/eev/jsp/qv?pri=peachit
```

3. Additional Parameters

More optional parameters can be appended to the required parameters; the additional information is generally separated via the & sign.

3.1 Login parameter

If neither *once login* nor *SSO* are used, you can also perform automatic search without prior login to the system by specifying additional login parameters in the URL:

Parameter: lg
Value: Login name of user to be used
Example: &Lg=schreiber

Parameter: pw
Value: Password for that user
Example: &pw=willi
Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&lg=schreiber&pw=willi
```

You need to remember that *login name* and *password* are transferred in plain text, and are therefore readable in the URL.

That is why this function should only be used in specific application scenarios or in combination with *SSL* (*https* instead of *http*).

If an external application always starts an external call via the same credentials, previous user sessions logged via this login will automatically terminate.

3.2 Specifying the display language

If **DOCUMENTS 4** is to start with a defined language, this parameter can be additionally specified:

Parameter: lng
Value: 0 to 5
Example: &lng
Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&lg=schreiber&pw=willi&lng=0
```

The information is entered according to the languages configured via the **DOCUMENTS Manager** for the specified principal.

4. Parameters for Searches in Current Processes

Current processes are DOCUMENTS files residing in DOCUMENTS 4 as *processes* and/or *workflow objects*.

4.1 Search for internal ID

If the ID of a DOCUMENTS file internally specified by DOCUMENTS 4 for current processes is known, this can be called directly:

Parameter: id

Value: Internal file ID

Example: &id=peachit_fi20110000001000

Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&id=peachit_fi20110000001000
```

4.2 Search in file types

If processes of a specific DOCUMENTS 4 file type are to be displayed, this can be performed by specifying the corresponding parameter:

Parameter: ft

Value: File type name

Example: &ft=ftInvoice

Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&ft=ftInvoice
```

You can also query more than one file type by specifying the `ft` parameter multiple times:

Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&ft=ftInvoice&ft=ftOrder
```

A search performed in this way would represent a hit list of all processes of the corresponding file types that the user can access owing to the permissions.

4.3 Search for field values

If you want to specify an additional search string for the search, you can also do this by specifying the corresponding parameter; the search for field values must be performed by specifying one or more file types.

Parameter: `q_FieldName>`

Value: Name of field

Example: `&q_company=okia`

Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&ft=ftInvoice&q_company=okia
```

When searching for field values, you can also specify multiple search parameters by specifying the `q_>FieldName>` parameter multiple times:

Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&ft=ftInvoice&q_company=okia&q_status=cleared
```

5. Parameters for Searches in DOCUMENTS ARCHIVE

When searching in DOCUMENTS ARCHIVE, you need to specify the store in addition to the file type:

Parameter: ft
Value: File type and store name (separated by an @ sign)
Example: &ft=ftInvoice@peachitStore1
Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&ft=ftInvoice@peachitStore1
```

As with searching in current processes, the `q_<FieldName>` parameter also allows searching by specifying field values.

The search can also be linked with searches in current processes by specifying file type and store:

Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&ft=ftInvoice&ft=ftInvoice@peachitStore1
```

6. Parameters for Searches in EASY ENTERPRISE.x

Special parameters are available for searching in EE.x archives:

Parameter: au
Value: EE.x unit (this parameter is optional if only the "default" unit is present)
Example: &au=Default

Parameter: ai
Value: EE.x instance (this parameter is optional if only the "default" instance is present)
Example: &ai=Default

Parameter: xcert
Value: EE.x certificate that replaces login, password, unit and instance (see EE.x documentation)
Example: &xcert=MIICIDCCAYmgAwI...

Parameter: vw
Value: Technical name of EE.x views (combinations of multiple view allowed)
Example: &vw=Invoice&vw=Order

If you want to search for internal field values in *EE.x archives* (e.g. DOCID or ROOTID), this is performed by specifying the `q_<FieldName>` parameter (as with current processes).

In that case, however, you need to specify the complete EE.x document reference (including pool and schema); example of ROOTID:

```
&q_ROOTID=Unit$DNDefault$CPInstance$DNDefault$CPPool$<EE.x  
Pool>$CPDocument$<EE.x Rootid>
```

Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&au=Default&ai=Default&lg=superadmin  
&pw=super&vw=Demo&q_ROOTID=Unit$DNDefault$CPInstance$DNDefault$CPPool$DNDe  
fault$CPPool$DNDemo$CPDocument$DNDemo$039A9BC0C24511DF94D8000C29C7C450
```

7. Parameters for Searches in EASY ENTERPRISE.i

Special parameters are available for searching in EE.i archives:

Parameter: ar
Value: Archive name
Example: &ar=\$(%23DEMO)\INVOICES
Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&ar=$(%23DEMO)\INVOICES
```

The special characters on specifying the location (#) must be replaced in the URL; this is done through the string %23.

When specifying multiple archives for EE.i, the first archive will be used as the main archive. If more archive servers exist, the archive server name must be appended with @ to the archive parameter

8. Additional Parameters

The parameters displayed below can be combined with the parameters listed above.

8.1 Range searches

Range searches can be used on date fields and numerical fields. In doing so, the following syntax is used:

```
&q_%01<FieldName1>=<Value1>&q_%02<FieldName1>=<Value2>
```

Example of the numerical field Amount, with the limit of 100-1000:

```
&q_%01Amount=100&q_%02Amount=1000
```

8.2 Sort order and hit lists

If the hit list is to be sorted during external search, the following syntax will be applied:

```
&sort=<FieldName1>,<FieldName2>,...
```

A comma-separated list of field names to be used to sort the search result is passed.

If a defined hit list is to be used for external search, the following syntax will be applied:

```
&hl=<Hit list name>
```

The hit list specified here must exist on the transferred file type or archive.

8.3 Full text search

When searching for full text contents during external search, the following parameter is used:

Parameter: q_Search_Fulltext
Value: the full text content to be searched
Example: &q_Search_Fulltext=okia
Sample URL:

```
http://127.0.0.1:8080/jsp/qv?pri=peachit&ft=ftInvoice&q_Search_Fulltext=okia
```

Full text searches can be performed both in current processes and in archives if this is supported by the archive settings.

8.4 View options

Appending the following parameter to the URL results in that the DOCUMENTS view automatically switches to full screen view, regardless of the user's previous configuration:

```
&_dlcViewMode=full
```

When appending the following parameter to the URL, a previously defined configuration to be considered for login can be loaded from the *FeatureManager* (see the corresponding documentation on how to configure the *FeatureManager*):

```
&fc=<Name of configuration>
```

If the **hit tree** is to be displayed immediately on starting *Quickview*, the following parameter can be appended to the URL:

```
&_tv=1
```

In doing so, it is always the hit tree that is displayed and the first DOCUMENTS file opens immediately.

9. Additional Information and Parameters

By appending the `&nft=<FileName>` parameter, a new DOCUMENTS file of the specified file type is created, the default workflow starts immediately, and the file opens in edit mode.

The field value can also be transferred via the additional parameter `&nff_<FieldName>=Value`, e.g.:

```
&nft=ftInvoice&nff_company=okia
```

Appending the `&nfw=false` parameter prevents starting the default workflow for quick creation of DOCUMENTS files using the above parameter, e.g.:

```
&nft=ftInvoice&nff_company=okia&nfw=false
```

When using [Quickview](#) for current processes, open working copies of DOCUMENTS files are generally also considered.

This means that the corresponding call will be canceled if a working copy exists. So, the user has to save or cancel an existing working copy before being able to continue with their external search by re-selecting the URL.

If open working copies should be ignored during external search, you can configure this through the global property (*DOCUMENTS* -> *Settings*) `"checkQVScratchCopies=false"`.

Appending the `&fn=<FolderName>` parameter directly indicates the specified folder on starting [Quickview](#); valid values for folder name are INBOX and OVERVIEW, e.g.:

```
&fn=INBOX
```

Appending the `&fi=<Folder ID>` displays the specified folder on starting [Quickview](#).

Because the ID used depends on the user, it must be read first via a system filter, for example:

```
&fi=78:33399
```

A system filter is an http query on dependent values of a user session via a simple API. The URL pattern for a system filter is built as follows:

```
http://<DOCUMENTS-Server>:<DOCUMENTS Server port>/jsp/sys/<Function>
```

The following functions are supported:

Function:

login_PRINCIPAL, e.g.: login_peachit

Description:

Logs in the transferred user; must be used with the lg and pw parameters.

Return values:

OK (return SessionID), NOK (user must change password), 412 (http error message, user login failed), 403 (http error message, forbidden access)

Function:

checkSession_PRINCIPAL, e.g.: checkSession_peachit

Description:

checks whether the user session is still valid.

Return values: OK (return SessionID), NOK (return 403, http error message, forbidden access)

Function:

getXmlTree_PRINCIPAL, e.g.: getXmlTree_peachit

Description:

Outputs the user's folder tree as an XML structure; the Id=private or id=public parameter can be additionally transferred.

Return values:

OK (return XML), NOK (return 403, http error message, forbidden access)

Function:

getLanguages_PRINCIPAL, e.g.: getLanguages_peachit

Description:

Returns the language IDs that DOCUMENTS 4 contains as comma-separated list.

Return values:

OK (return "Id1=locale1, Id2=locale2,..."), NOK (return 403, http error message, forbidden access)

Function:

logout_PRINCIPAL, e.g.: logout_peachit

Description:

Logs out the logged-in user from the system.

Return values:

OK (return OK), NOK (return 403, http error message, forbidden access)

10. Quick Overview of QuickView Parameters

Parameter	Brief Description
&pri=	DOCUMENTS principal, e.g. &pri=peachit
&lg=	Login name, e.g. &Lg=schreiber
&pw=	User's password, e.g. &pw=willi
&lng=	Login language to be used, e.g. &lng=0
&id=	Find document ID, e.g. &id=peachit_fi20110000001000
&ft=	Name of file type, e.g. &ft=ftInvoice (DOCUMENTS ARCHIVE incl. @Store)
&q_FieldName>=	Name of field value to be searched, e.g. &q_company=okia
&au=	EE.x only, specify EE.x unit, e.g. &au=Default
&ai=	EE.i only, specify EE.i instance, e.g. &ai=Default
&xcert=	EE.x only, specify the EE.x certificate &xcert=MIICIDCCAYmgAwI . . .
&vw=	EE.x only, specify the EE.x view, e.g. &vw=Invoice
&ar=	EE.i only, specify the EE.i archive, e.g. &ar=\${(%23DEMO)}\INVOICES
&q_%01<from>=	Range search, e.g. &q_%01Amount=100&q_%02Amount=1000
&sort=	Specify sort order, e.g. &sort=company,amount
&hl=	Specify hit list, e.g. &hl=Default
&q_Search_Fulltext=	Full text search, e.g. &q_Search_Fulltext=okia
&_dlcViewMode=	Start with full view, e.g. &_dlcViewMode=full
&fc=	Specify the FeatureManager configuration to be used, e.g. &fc=minimal
&_tv=	Hit tree view, e.g. &_tv=1
&nft=	Quick creation of DOCUMENTS files using the file type, e.g. &nft=ftInvoice
&fnn_<FieldName>=	In combination with &nft= for field value population, e.g. &fnn_company=okia
&nfw=	In combination with &nft= for specifying whether the workflow should be started, e.g. &nfw=false
&fn=	Folder to be displayed, e.g. &fn=INBOX
&fi=	Folder to be displayed (ID), e.g. &fi=78:33399