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# *PDG Commerce*

## *Installation Guide*

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# Installation Overview

*Installation Overview for Windows NT*

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**A**dding PDG Commerce to your web site consists of three main activities.

In order, they are:

- Installation
- Configuration
- Embedding PDG Commerce in your web store

## Installation Issues

Installation issues include:

- Downloading PDG Commerce files
- Uncompressing PDG Commerce files
- Copying PDG Commerce files to your ISP's server
- Adjusting PDG Commerce files to reflect the directory location and structure on the ISP's server
- Setting security permissions for files
- Installing the License
- Setting database connectivity (ODBC and DSN)
- Installing FrontPage or NetObjects Fusion Components

## Configuration Issues

Configuration consists of using the Merchant Administrator to configure PDG Commerce's many options including the addition and maintenance of products.

## Embedding PDG Commerce

Embedding PDG Commerce consists of adding PDG Commerce functionality to your web store. This can be done by EITHER using HTML forms to 'call' PDG Commerce functions, OR by using FrontPage or NetObjects components to 'call' PDG Commerce functions.



*Preparing to Install PDG Commerce*

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**F**ollowing this guide will make the installation process easy and painless and will have you up and running in no time.

## Preparing for Installation

Prior preparation can prevent future headaches, so we recommend that you run through the following checklist before beginning installation:

Make sure you know the platform of the server on which your Web store resides or will reside.

- Verify that your system or your site's host server meets the hardware/software requirements spelled out in the next section.
- Have your user I.D and password handy so that you can access your web store's host server.
- If you are going to install PDG Commerce on your web host's server, have your web host's database connectivity information available.
- If you are going to use an Internet credit card payment service for credit card authorizations, make sure you have already established your account and have your account information, ID, password, etc. handy for reference.
- If using SSL, know the complete URL to the secure server.
- Finally, this manual assumes that you have a basic understanding of zip/unzip utilities, file transfer protocol (FTP) and Telnet programs, are familiar with CGI<sup>1</sup> and know the location of your cgi directory on your host's server. If you are not, you may want to enlist additional help or familiarize yourself with these programs.

<sup>1</sup> The Common Gateway Interface (CGI) is a standard for interfacing external applications with information servers, such as HTTP or Web servers. A plain HTML document that the Web server **retrieves** is **static**, which means it exists in a constant state: a text file that doesn't change. A CGI program, on the other hand, is **executed** in real-time, so that it can output **dynamic** information. CGI programs usually reside in a special directory named /cgi-bin, but depending on host server software, may be named cgi, cgin or cgi-bin. More information about CGI is available at: <http://hoohoo.ncsa.uiuc.edu/cgi/overview.html>.

## Installation Notes

It cannot be stressed strongly enough, how important it is that your PDG Commerce site have the proper permissions set, not only for security reasons, but also to ensure proper operation. Many errors in functional operation can be traced to having improper permissions on the directories or files, particularly the PDG\_Commerce directory.

If you are running on a UNIX server, the proper permissions for the PDG\_Commerce directory in your cgi-bin are "777", or "-rwxrwxrwx" (full permissions).

If you are running on a Windows NT server, the permissions for the PDG\_Commerce directory (and all files and subdirectories it contains) are "Change (Read, Write, Execute, Delete)" for the browser user.

Note that PDG Commerce is a server-side program. No client-side version of it exists. To operate properly, it is necessary to have a web server program running on the computer that you want the software to run on, and the pages must be viewed through that server. Simply previewing them in your HTML editor on your local machine is not enough, because the elements will not work properly.

Many merchants may become confused about uploading their license to their site. When you receive a license in your email, it may arrive either inline (in the body of the email), or as an attached file.

If it comes as an inline file, you can simply highlight it, copy it, and paste it into a blank text file. When you save the file, you must make certain it is named "shopper.lic", otherwise the software will not recognize it (for example, do NOT name it "commerce.txt" or "shopper.lic.txt").

If it comes as an attached file, it should be already formatted properly. Save it to your hard drive for reference.

In either case, at this point you may upload the file. You must upload it to the "PDG\_Commerce" directory, under your cgi directory.

## System Requirements for PDG Commerce

Before installing PDG Commerce, verify that the system which will be running PDG Commerce meets certain requirements.

Generally, the following requirements should be met in order for PDG Commerce to function properly:

- A Web server that is Common Gateway Interface (CGI) compliant. Most major Web servers, including Netscape, Apache, IIS 4.0, NCSA, Cern, etc. are compliant.
- At least .5MB of hard drive space available in the CGI directory

- Ability for the Web server to access and write to the CGI directory and subdirectories for retaining logs and invoice numbers
- A program on the Web server that can send mail
- For both your local computer and NT servers, ODBC connectivity and access to an ODBC datasource is required.
- For NT machines, you will need a mail-sending client. PDG Commerce supports three such programs: Stalkers Labs' Mail Program, GeoCels' WindMail and Blat.

As for your customers, they will need to use a Web browser that supports client-side cookies and tables in order for PDG Commerce to display and function properly while visiting your Web store. For the vast majority of your customers today - this will not be an issue as Netscape Communicator and Navigator and Microsoft Internet Explorer are compatible.

## Downloading PDG Commerce

If you have everything you need from the checklist and your system, and your host's system meets the requirements, you should be ready to install PDG Commerce. The first step is to download the software, if you have not already done so.

When you download PDG Commerce, you are retrieving what we call an "archive". The archives include the executables and files which comprise PDG Commerce, the User Guide and Installation manual in Adobe Acrobat format (PDF) and a readme.txt file with the latest announcements and advisories concerning the product.

## How to Download the Software

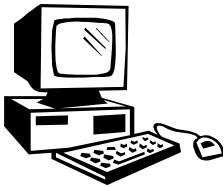
If you have not already done so, go to [www.pdgsoft.com](http://www.pdgsoft.com) and download the PDG Commerce file.

 *End*



# Installation for Windows 9x/NT

*Completing a new installation onto an NT server*

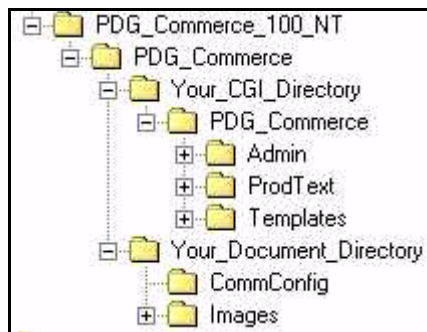


**T**his chapter will guide new users of PDG Commerce in the installation of the software onto a Windows NT/95 server. Prior to beginning the steps outlined throughout, you should make sure that you have downloaded the correct version of PDG Commerce.

## Unzipping the Archive

If you have not already done so, download PDG Commerce by following the steps outlined in 'Getting Started' at the beginning of this guide. The zip file you download is referred to as an "archive".

Next, extract the archive files using a zip/unzip utility such as WinZIP. Your extracted archive should have the following structure:



PDG Commerce archive structure

Along with the 'Your\_CGI\_Directory' and 'Your\_Document\_Directory' subdirectories, there will also be three \*.pdf files one readme.txt file, and one \*.mdb file. The two \*.pdf files contain the installation guide, the license agreement,

and the CreatDB Installation Guide. All of these .pdf files can be viewed using Adobe Acrobat Reader. The readme file contains the latest information on PDG Commerce.

## Web Server Installation

PDG Commerce requires a web server and database connectivity to run properly. PDG Commerce is distributed ready to work with Microsoft Access or SQL databases. It is the customer's responsibility to have access to a functioning webserver and database connectivity.

If you are installing PDG Commerce on your host's server, you must obtain their database connectivity information and configure database connectivity accordingly.

Note also that you must copy the pdgdb.mdb file from your local PDG\_Commerce directory to your site's PDG\_Commerce directory, or the location specified by your ISP, and configure database connectivity accordingly.

## Transferring the 'Your\_CGI\_Directory' Files

Using an FTP program (such as WS-FTP) -

1. Start a session and connect to your Web store's location on its host server.
2. In the 'Local System' window of your FTP session, locate the directory containing the PDG Commerce files that you extracted.

## Transfer the 'Your\_CGI\_Directory' Contents

Transfer the contents of the 'Your\_CGI\_Directory' subdirectory into your Web store's CGI directory (seen in the 'Remote System' window of the FTP session) in the following manner:

**NOTE:** *You may first need to create a CGI directory if one does not exist.*

1. Transfer the six executable files (CommConfig.exe, ChangePW.exe, Commerce.exe, ShopperLog.exe, CreateDB.ext, and redirect.exe) as "binary" since these are compiled binary objects.
2. Transfer the 'PDG\_Commerce' subdirectory and its contents as "ASCII" (note: simply highlighting the 'PDG\_Commerce' folder in the 'Local System' window of your FTP session and transferring the folder itself keeps all contents intact and creates a 'PDG-Commerce' subdirectory on the 'Remote System' side).

The contents of the 'PDG\_Commerce' subdirectory are: three subdirectories - 'ProdText' (containing sample product text files) and 'Templates' (containing default shopping cart HTML templates), seven files - ConfigPW, InvCount.txt, table.def, products.pdg, shipping.conf, shopper.conf, and shopper.lic. The subdirectory, Admin, contains the administration template

## Transferring the 'Your\_Document\_Directory' Files

Continuing with your FTP session, transfer the contents of the 'Your\_Document\_Directory' subdirectory into your Web store's root document directory ('public-html' directory) in the following manner:

1. First, transfer the 'CommConfig' subdirectory and its contents as "binary" (note: simply highlighting the 'CommConfig' folder in the 'Local System' window of your FTP session and transferring the folder itself keeps all contents intact and creates a 'CommConfig' subdirectory on the 'Remote System' side).

The 'CommConfig' subdirectory contains 35 image files which appear on the Administrator's main menu, plus four HTML files - index.html, password.html, License.html, and combillcapture.html

2. Transfer the 'Images' subdirectory and its contents as "binary" (note: simply highlighting the 'Images' folder in the 'Local System' window of your FTP session and transferring the folder itself keeps all contents intact and creates a 'Images' subdirectory on the 'Remote System' side).

The 'Images' subdirectory contains sample images that are used when testing your installation of PDG Commerce. If you already have an "images" subdirectory in your root document directory, you may want to create a new images subdirectory and transfer the contents of the 'Images' subdirectory on your 'Local System' into the newly created images subdirectory on the 'Remote System'. If you do, make note of the new subdirectory's name, you will need to make adjustments to image URLs later, using the Merchant Administrator.

3. Transfer the 'commerce.html' file as "ASCII"

At this point, all of the files necessary for PDG Commerce to function are now on your Web store's server. However, there is still some fine tuning left to be done.

## Adjusting the 'index.html', 'password.html', and 'combillcapture.html' Files

In the 'Local System' window of your FTP session,

1. Locate the 'index.html', 'password.html', and 'combillcapture.html' files in the 'CommConfig' subdirectory in the 'Your\_Document\_Directory' subdirectory.
2. Highlight the 'index.html' file and click the 'View' button. This opens the file in Notepad.
3. Locate the following "form method" HTML tag:

```
<form method="post" action="/cgi-bin/CommConfig.exe" name="login">
```

You will need to edit this tag to reflect the CGI program's location.

4. Replace 'cgi-bin' with the correct directory name where the CommConfig program is located. Your new tag should look something like this:

`<form method="post" action="/cgi-bin/CommConfig.exe" name="login">`



or '/cgi/', or '/cgibin/' – whatever the directory name happens to be...

5. Save the changes and then "re-transfer" the file, this time as 'ASCII', into the 'CommConfig' subdirectory in your Web store's root document directory. This will overwrite the existing index.html file that was earlier transferred as 'binary'.
6. In the 'Local System' window of your FTP session, locate the 'password.html' file and click the 'View' button. As before, this opens the file in Notepad. Locate the following "form method" HTML tag:

`<form method="post" action="/cgi-bin/ChangePW.exe">`

7. Just as you made adjustments to the form method tag in the index.html file, make the same changes to this tag, i.e. specify the CGI directory. Save these changes and "re-transfer" the file as 'ASCII' into the 'CommConfig' subdirectory in your Web store's root document directory.
8. Repeat these steps to adjust the 'combillcapture.html' file.
9. Transfer the pdgdb.mdb file to the PDG\_Commerce directory in your cgi-bin directory.

## Adjusting the 'commerce.html' File

In the 'Local System' window of your FTP session,

1. Locate the 'commerce.html' file located in the 'Your\_Document\_Directory' and click 'View' to open the file in Notepad.
2. Locate the following HTML tags:

`<p><a href="/cgi-bin/Commerce.exe?preadd=action&key=A0001">View Product A0001</a></p>`

`<p><a href="/cgi-bin/Commerce.exe?preadd=action&key=A0002">View Product A0002</a></p>`

`<p><a href="/cgi-bin/Commerce.exe?display=action">See what is in your cart</a></p>`

`<p><a href="/cgi-bin/Commerce.exe?checkout=action">Purchase the contents of your cart</a></p>`

`<p><a href="/cgi-bin/Commerce.exe?version=action">Display the installed PDG Commerce license</a></p>`

3. As with the previous HTML templates that you adjusted, you need to designate the CGI directory preceding the 'Commerce' executables.

4. Additionally, you may need to add '.exe' to the end of the 'Commerce' executable files.

Once you have made these changes, save the file and re-transfer it as ASCII into the root document directory, replacing the commerce.html file that was transferred earlier.

## Setting the NT Permissions for 'PDG\_Commerce' Subdirectory Contents

The contents of the 'PDG\_Commerce' directory must have "read", "write" and delete permissions in place. If your ISP or site's host does not have a way for you to set these yourself, you should contact them for assistance in setting these permissions.

## Install the PDG Commerce License

Open the e-mail message you received after downloading the PDG Commerce archive. Copy the license information by highlighting the text and clicking the copy button on the toolbar.

Return to your FTP session and locate the 'shopper.lic' file in the 'Local System' window. This file can be found in the 'PDG\_Commerce' subdirectory of the 'Your\_CGI\_Directory' directory. Once located, highlight the file and click 'View' to open the file in Notepad. Delete the "sample" license text which appears in this file and paste the license text that you copied from the e-mail message.

The license text looks like this:

**yourwebstore.com**

**ABCDEFGHIJKLMNPOQRSTUVWXYZAABBCC**

**0!pdg@pdgsoft.com**

Save the changes and re-transfer the file as 'ASCII' into the 'PDG\_Commerce' subdirectory of your Web store's CGI directory.

Your PDG Commerce has been installed. Remember, if you created an alternative "images" directory, you need to adjust the URL of product images within the Administrator.

You can test your installation of PDG Commerce by pointing your browser to:

**www.[insert Web store domain here].com/commerce.html**

## Local Installation

It is possible to install PDG Commerce on a local PC. If you are installing locally, your computer must meet the system requirements stated at the beginning of this manual and you must configure database connectivity (ODBC and DSN) locally instead of on the host's web server.

You must also have MSAccess and MS Personal Webserver installed.

Local installation is similar to web server installation, except that you do not FTP files to your wwwroot directory.

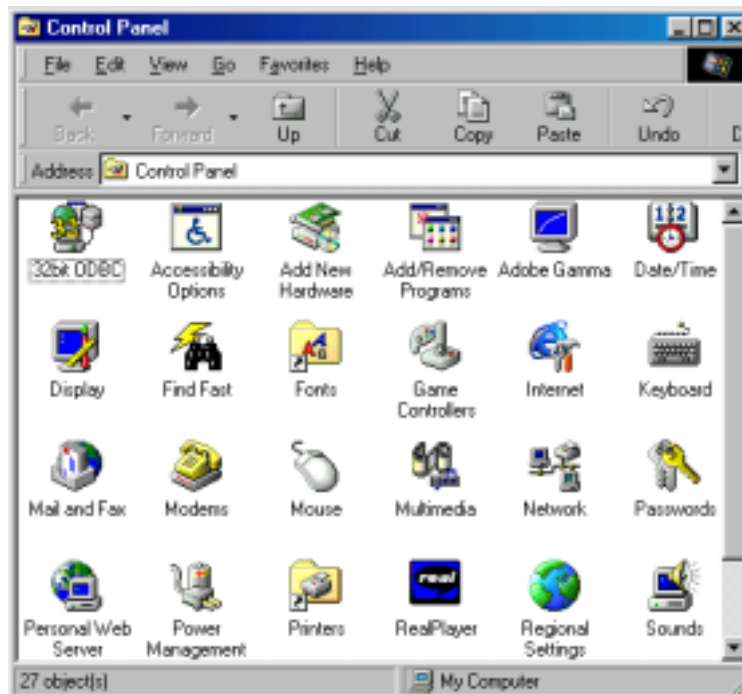
After downloading and unzipping the archive, simply copy the PDG Commerce files to their appropriate folders in your local wwwroot directory. These locations are described in the section on Web Server Installation. Note that you must also set permissions for these files if your local PC is running NT.

After copying the files locally, you must configure database connectivity (ODBC and DSN) for local access.

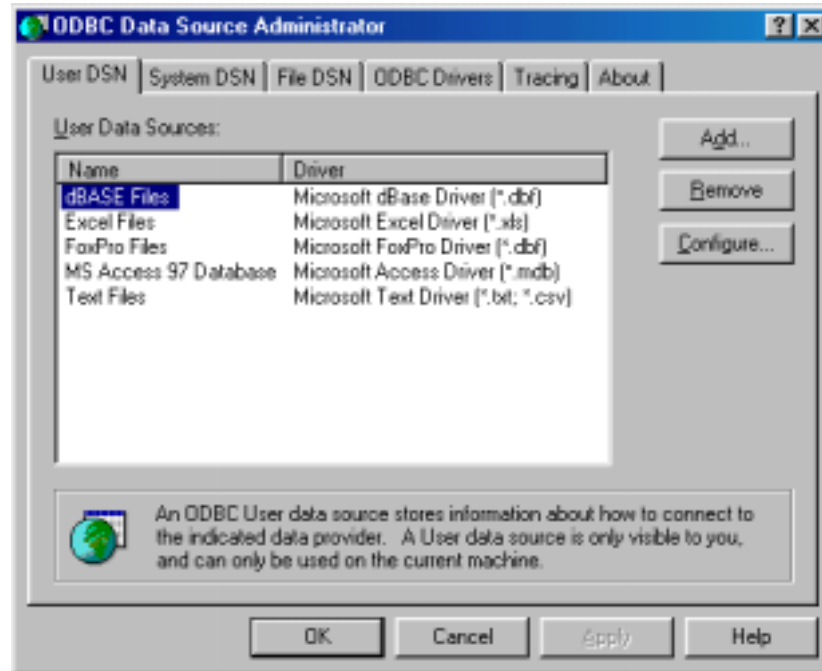
## Setup ODBC and DSN Locally

To setup ODBC and DSN on your local machine, from the Windows Start Menu, select, 'Settings', 'Control Panel'.

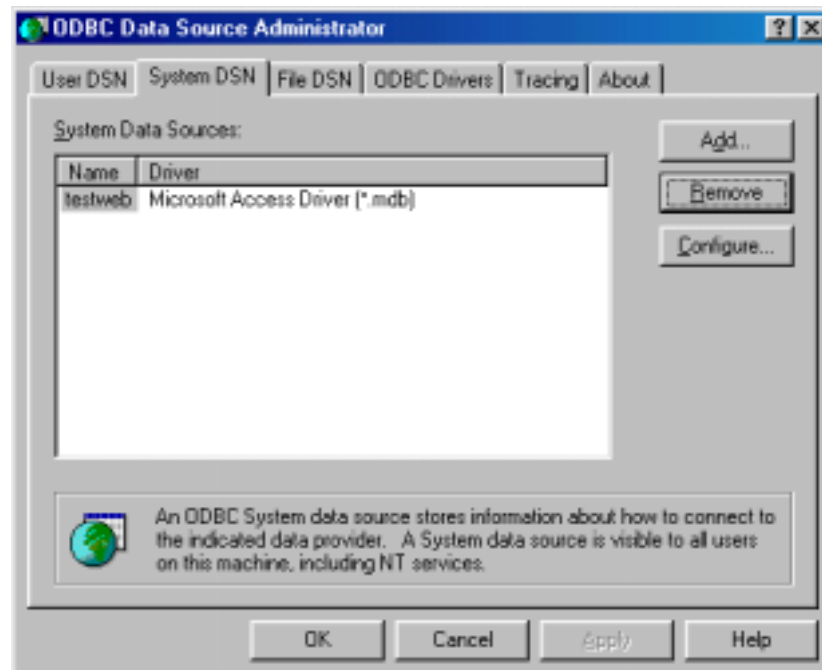
The following screen will appear.



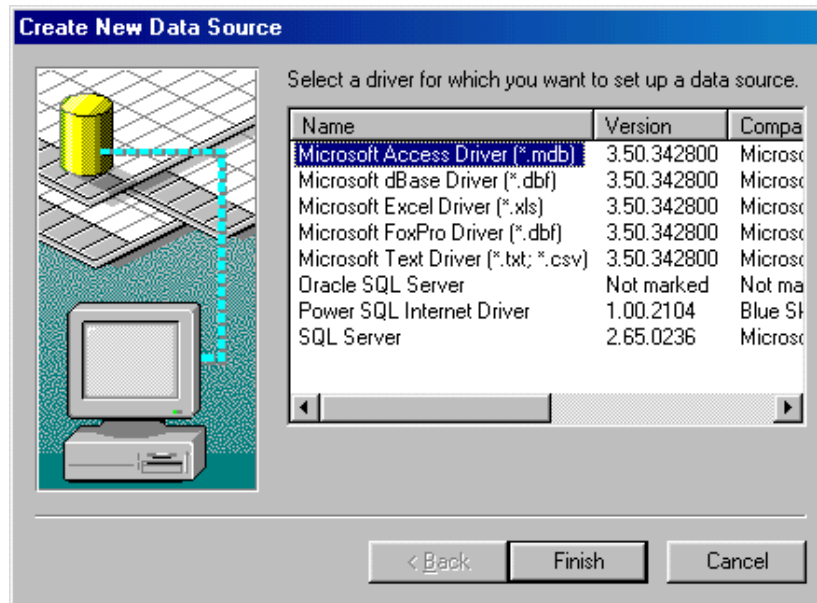
In the Control Panel, double click '32Bit ODBC'.



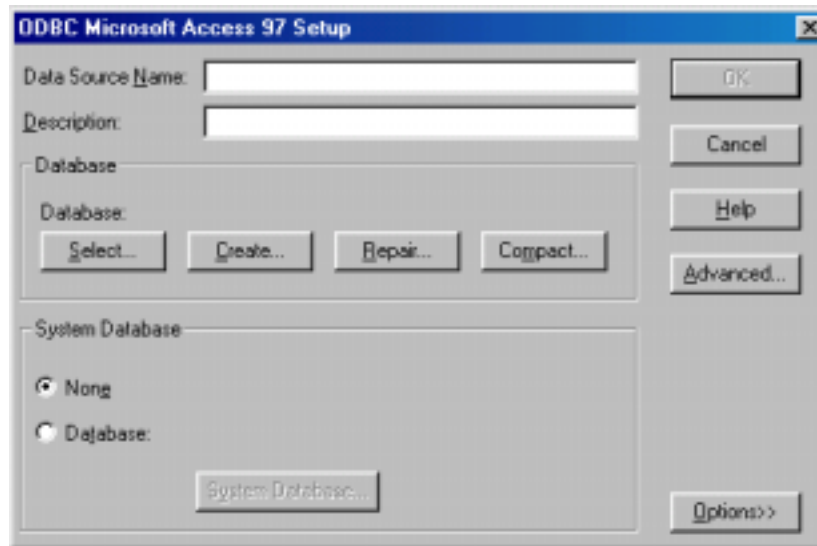
Click on the 'System DSN' tab.



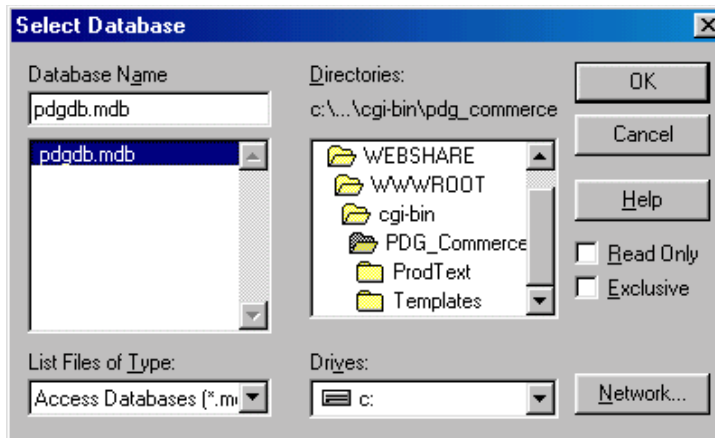
Click the 'Add' button.



Select the Microsoft Access Driver (\*.mdb) and click the 'Finish' button.



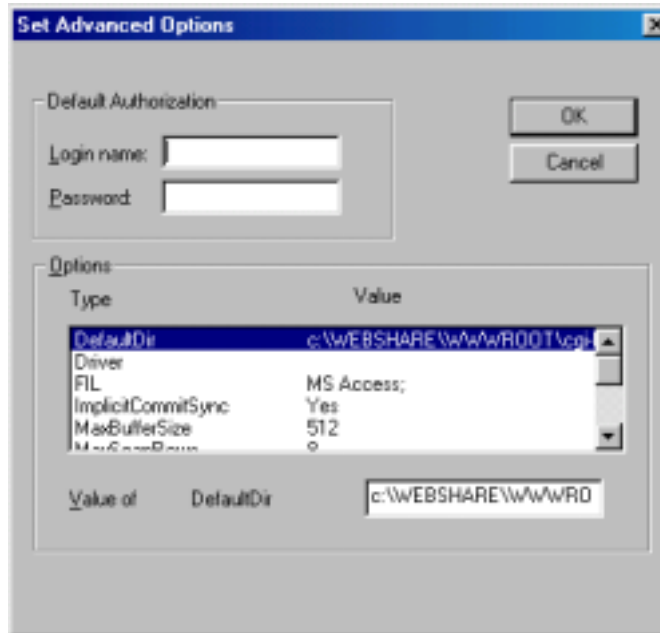
In the Data Source Name field, type pdgdb then click the 'Select' button.



Navigate to the directory on your personal web server where you have the pdgdb.mdb file and make sure the filename is selected.

Click on the 'OK' button. You will be returned to the previous screen.

Click on the 'Advanced' button. The following screen should appear.



Type in a Login name and password, then click on the 'OK' button.

Click the 'OK' button.



Click the 'Ok' button and then close the Control Panel.

*Note that this procedure only sets database connectivity on your local computer, NOT your host server. Contact your ISP for their connectivity procedure, login password, etc.*



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**P**DG Software has plugin components available for either Microsoft Frontpage or NetObjects Fusion that automate the process of embedding Commerce functionality in your web site without writing code.

You may download either component and its installation guide from the PDG Software website at, <http://www.pdgsoft.com>.

See the PDG Commerce User Guide, the FrontPage Component Guide, or the NetObjects Fusion Component Guide for details about embedding PDG Commerce functions in your web pages or using the components.





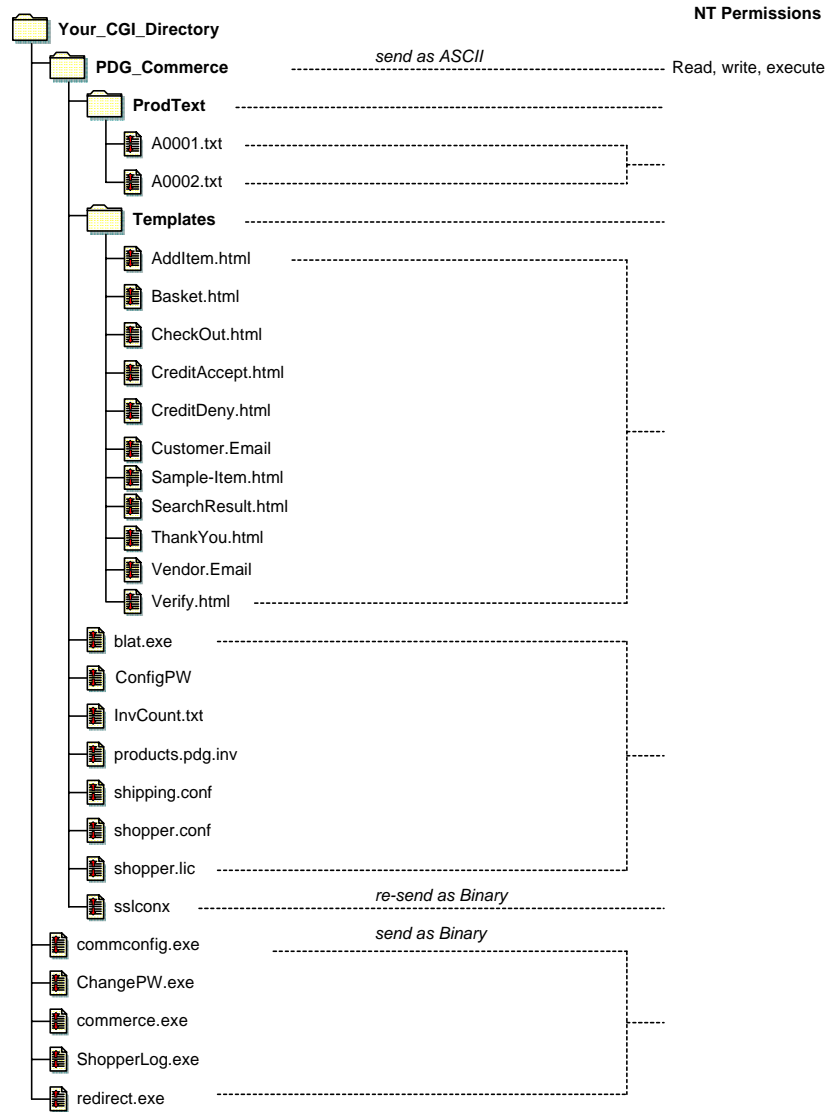
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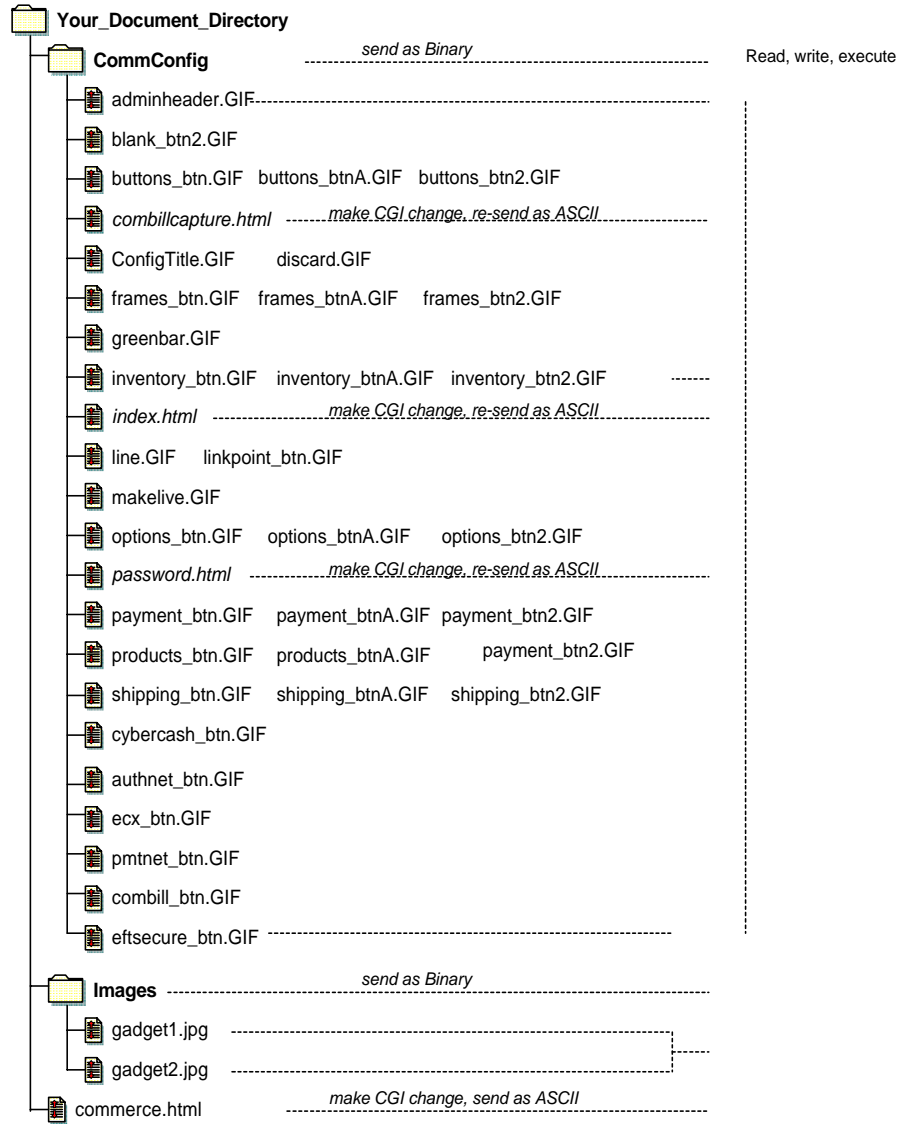
**T**he following pages illustrate the directory file structure of a fully installed version of PDG Commerce.

The first page illustrates those files which should reside in your CGI directory. The second page illustrates those files which should reside in your main document directory - also referred to as your HTML directory.

See the PDG Commerce User Guide, the FrontPage Component Guide, or the NetObjects Fusion Component Guide for details about embedding PDG Commerce functions in your web pages or using the components.







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