

QDABRA DBXL'S PDF RENDERING SERVICE CONFIGURATION

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This document will guide you through the installation of DBXL Rendering Service for DBXL v3.0.

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PREREQUISITES

The Qdabra DBXL Rendering Service requires the following components

- IIS SMTP Service is a component for forwarding e-mail messages to an SMTP server for delivery.
- DBXL Administration Tool v3.0

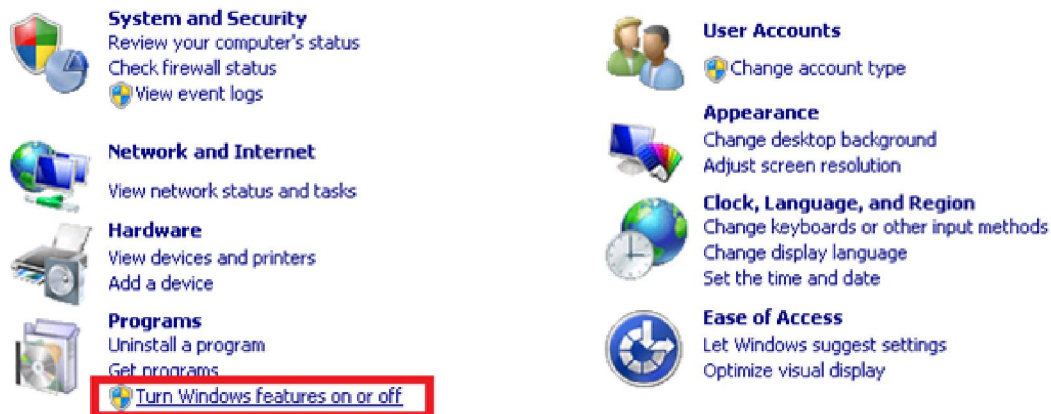
This guide assumes that the SMTP Service of the Internet Information Services (IIS) is installed and configured on your server in order to send e-mail from an ASP.NET Web application.

Please proceed to the Installation of DBXL Administration Tool v3.0 if IIS SMTP Service is already installed and configured. Otherwise, follow the steps below.

Installing the SMTP Service

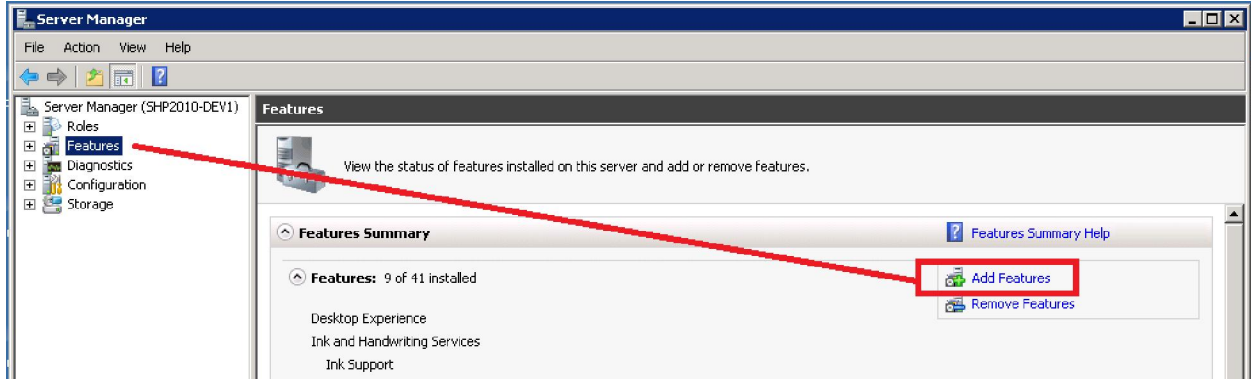
The SMTP service is not installed by default with IIS. You must install the SMTP service using Control Panel. Installing the SMTP service creates a default SMTP configuration that you can then customize by using IIS Manager.

On the Start menu, click Control Panel, double-click Add or Remove Programs, and then click Turn Windows features on or off.



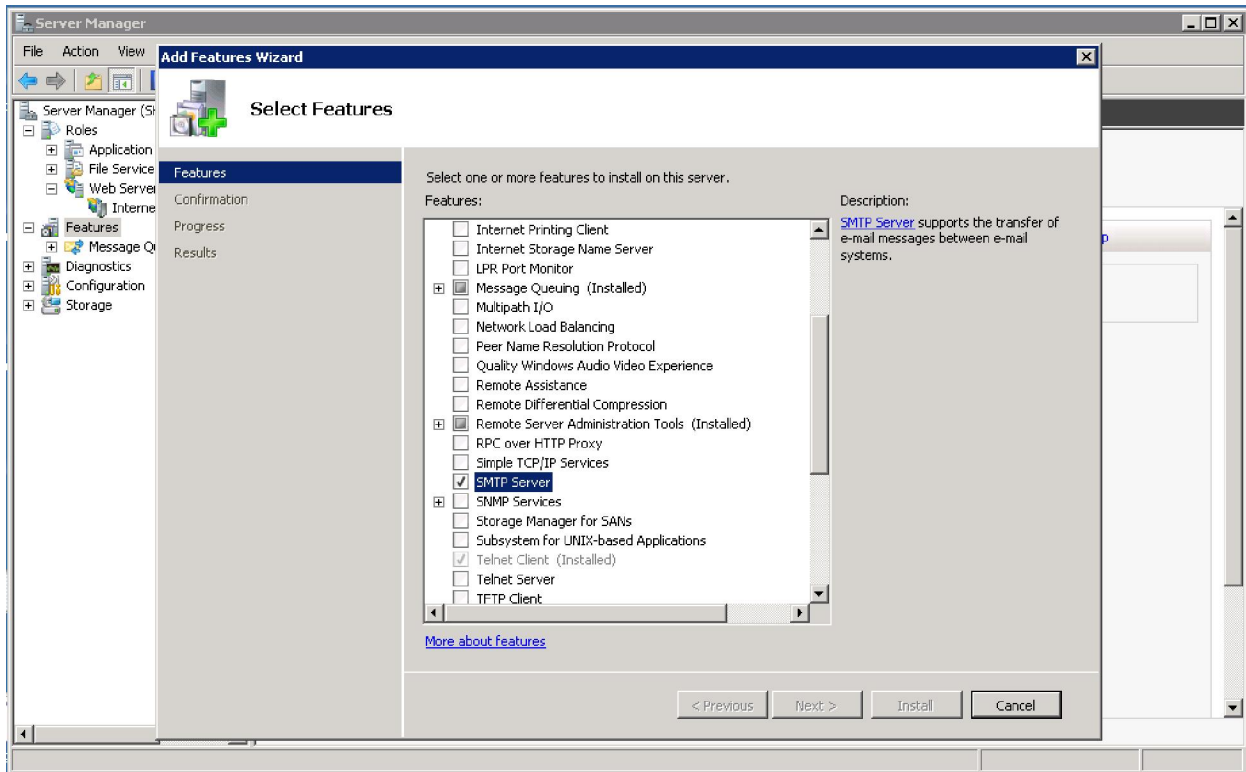
- Click Add Features.





- Enable SMTP Server by ticking the checkbox, and then browse through the Add Features Wizard.

Another option is to use mail.adhost.com.



Installing DBXL Administration Tool v3.0

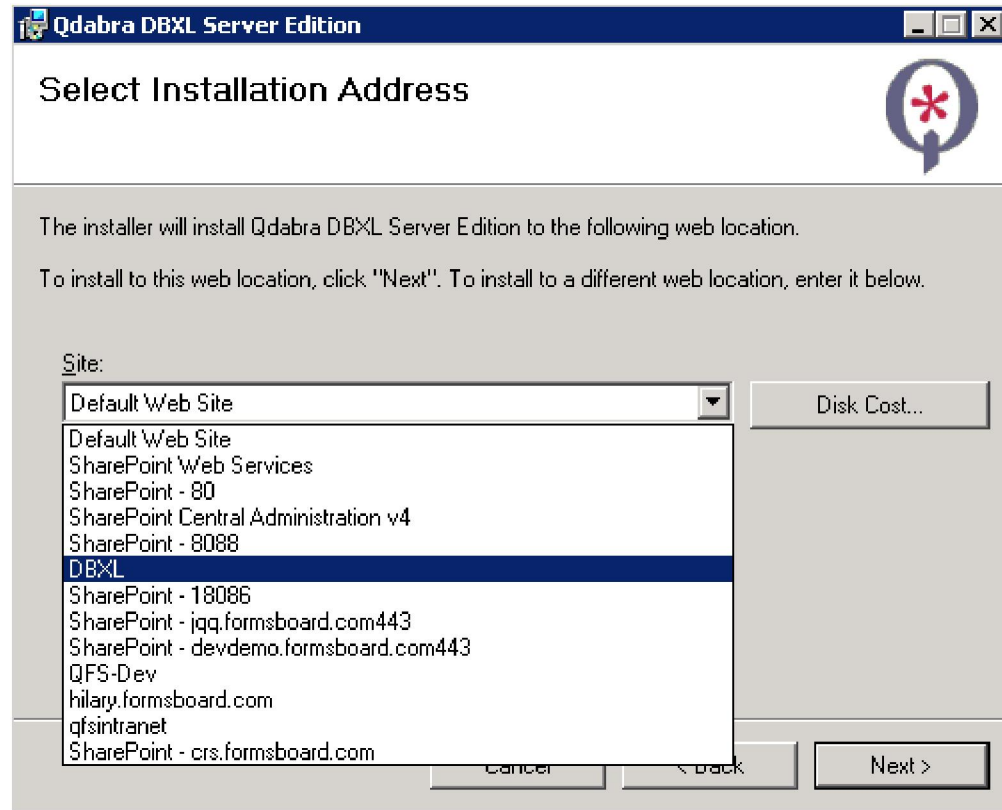
This section shows the step-by-step installation procedure for DBXL Administration Tool v3.0 – which allows the RDF Rendering feature. In the event that DBXL v3.0 is already installed, please proceed with installing the Qdabra DBXL Rendering Service.



- Right click on setup.exe and select Run as Administrator

Careful! The installation package includes both a .NET 2.0 and a .NET 4.0 version of the DBXL installation files. Please select the correct version for your site. If the incorrect package is used, the installer will change the site's configuration and the site will remain broken until manually fixed up in IIS.

- Click Next in the Welcome screen.
- After reviewing the **End User License Agreement**, select **I Agree** and click **Next**.
- In the **Installation Address** screen, you will find a dropdown listing all sites. Select the desired Site for installation from the dropdown.
 - Note that all sites (even sites that are stopped) are listed in this screen. Make sure to select the correct site for installation.
 - Use IIS Manager to check the available sites to confirm that the correct site is being selected and that the site is not stopped.



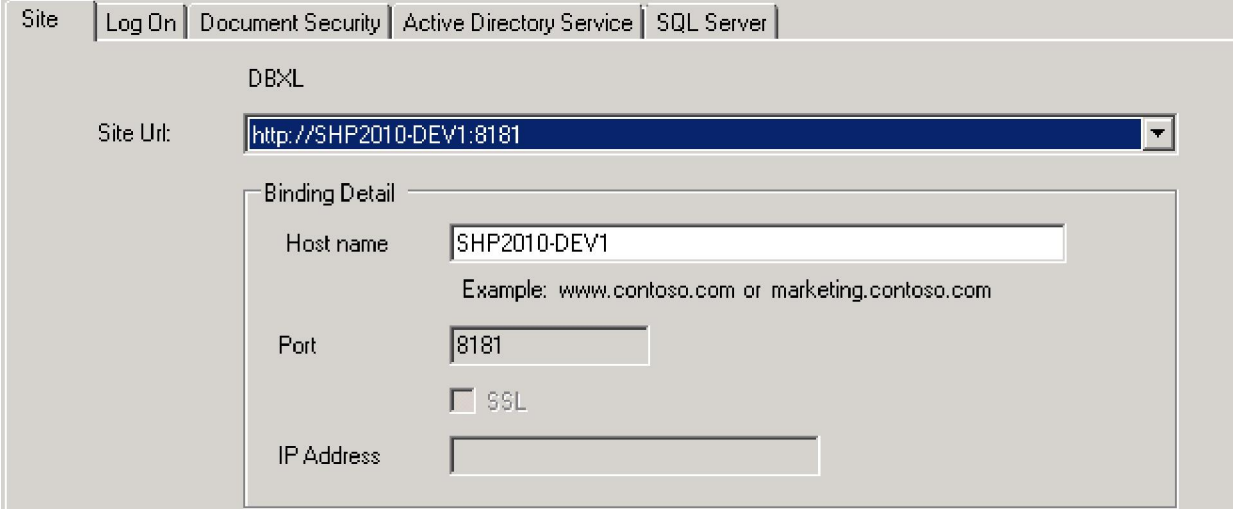
- The **Virtual Directory** is set to QdabraWebService by default, but this can be changed if desired.
- Click **Next**, and in the **Confirm Installation** screen, click Next again.



You will see a bar indicating the progress of the installation. Once completed, you will see a screen with various tabs. The following sections describe each tab.

THE SITE TAB ALLOWS YOU TO SELECT THE SITE URL

- From the Site Url dropdown, select the desired site.
 - The Site Url dropdown will show a list of combinations of SSL and host headers defined in IIS.



The screenshot shows the 'DBXL' configuration window with the 'Site' tab selected. The 'Site Url' dropdown menu is open, showing 'http://SHP2010-DEV1:8181'. Below it, the 'Binding Detail' section is visible, containing the following fields:

- Host name: SHP2010-DEV1 (with example text: www.contoso.com or marketing.contoso.com)
- Port: 8181
- SSL:
- IP Address: (empty field)

- If you select one of the options that does not use the machine name, the Binding Detail section will be disabled.
 - If you select one of the options that uses the machine name, the Binding Detail section will allow you to override the host header to be something not specified in IIS.
 - If the site is using an alias, you will need to specify it in the host header field during installation.
- When installing DBXL in some environments, the default Site Url will be SSL. Do not select the HTTPS site unless you have configured a certificate.
 - If the site will be accessed via HTTPS, you will need to configure the website for SSL before installing DBXL.
 - If a fully qualified domain name is being used, that value should be entered in the hostname field during installation.
 - This tab will also show you the expiration date for the trial license. If you notice that the trial license has expired, please download the most recent version from Qdabra.com or contact support@qdabra.com.
 - Click Next to proceed to the following tab.

THE LOG ON TAB ALLOWS YOU TO INDICATE THE ACCOUNT WHICH DBXL WILL RUN AS.



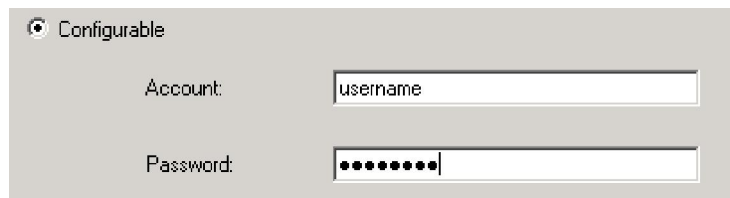
- Select between Predefined and Configurable account credentials.
 - If you select Predefined, you will not need to provide credentials.



The Qdabra™ Database Accelerator will run under these account credentials. It will attempt to add this logon to SQL Server if using Windows Authentication account after installation by changing the DbxlAppPool identity in IIS. This is a member of the IIS_WPG security group.

Predefined Network Service

- If you select Configurable, you must provide an Account and Password.



Configurable

Account:

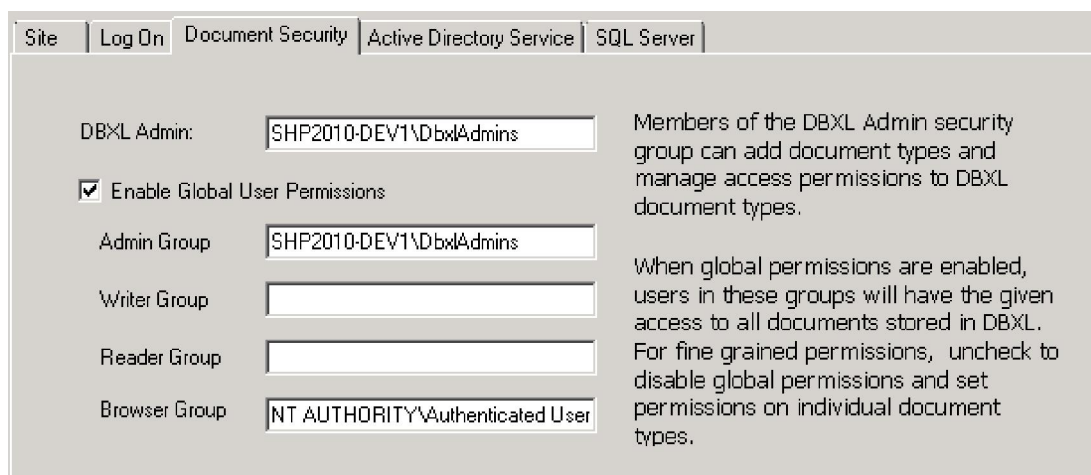
Password:

- Click Next to proceed to the following tab.

DOCUMENT SECURITY

In the **Document Security** tab you can set up permissions for DBXL. The DBXL installer automatically creates a local group called DbxlAdmins. You can add users to the DbxlAdmins group after installation has completed; the member of this group will be able to manage licenses, add document types, and manage access permissions to DBXL document types.

If you want to use your own group, make sure that you (the user installing DBXL) have been added to the group.



DBXL Admin: Members of the DBXL Admin security group can add document types and manage access permissions to DBXL document types.

Enable Global User Permissions

Admin Group When global permissions are enabled, users in these groups will have the given access to all documents stored in DBXL.

Writer Group

Reader Group For fine grained permissions, uncheck to disable global permissions and set permissions on individual document types.

Browser Group



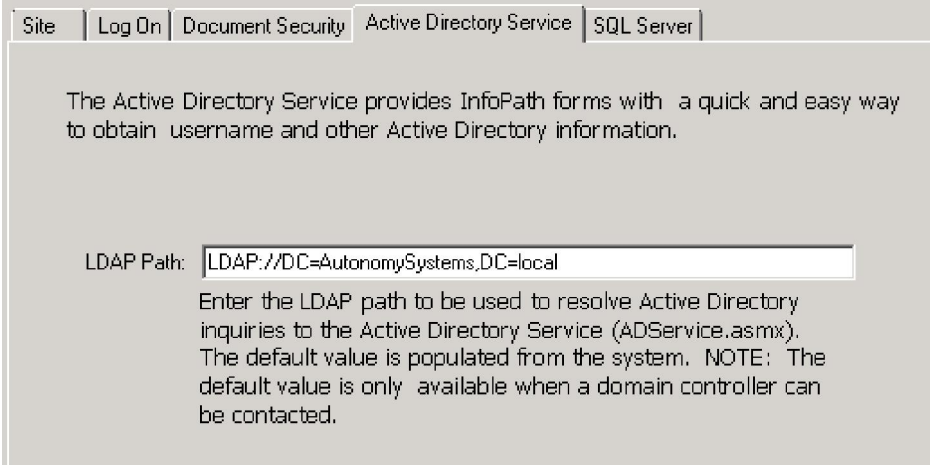
This screen has other options, such as the **Enable Global User Permissions** checkbox. If you uncheck **Enable Global User Permissions** checkbox, you will have to set permissions on every individual document type, since the Global Permissions will not be enforced. Disabling global permissions does not make DBXL “wide-open”. On the contrary, it restricts access to DBXL.

- Click **Next** to proceed to the following tab.

ACTIVE DIRECTORY SERVICE

The **Active Directory Service** is used to obtain username and other Active Directory Information. In the **LDAP Path** textbox, the default value is populated from the system when a domain controller can be contacted.

- If the domain controller cannot be contacted, the LDAP Path will default to LDAP://DC=domain. You’ll need to manually enter the LDAP Path (for example: **LDAP://DC=DomainName,DC=com**).



The Active Directory Service provides InfoPath forms with a quick and easy way to obtain username and other Active Directory information.

LDAP Path:

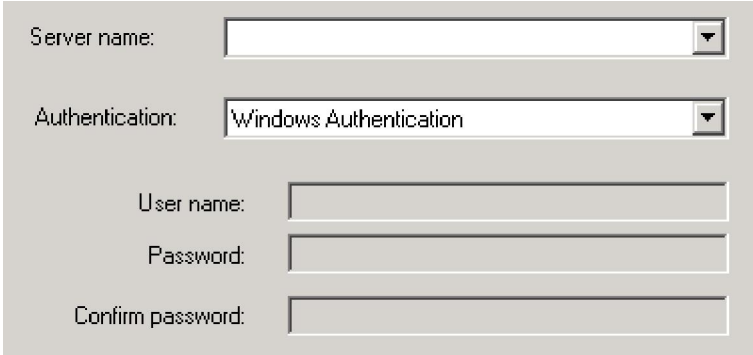
Enter the LDAP path to be used to resolve Active Directory inquiries to the Active Directory Service (ADService.asmx). The default value is populated from the system. NOTE: The default value is only available when a domain controller can be contacted.

- Click **Next** to proceed to the following tab.

SQL SERVER



In the **SQL Server** tab, indicate the database where DBXL will store its data.



- Select the **SQL Server name**. The dropdown will list all local SQL instances that were detected by the installer. For example, in the case of a SQL Express installation on the same machine, this will be **(LOCAL)\SQLEXPRESS**. You may still type in the name of a remote SQL instance, if desired, or if the installer fails to list the correct SQL instance.
- Select the **Authentication** type used to access the SQL server from the dropdown
 - If you select **Windows Authentication**, no credentials will be necessary. The account of the user installing DBXL will be used to connect and create the database and thus requires sysadmin permission. The account used for the DBXL application pool will be granted db_datareader and db_datawriter permission during setup.
 - If you select **SQL Server Authentication**, fill out the **User name**, **Password** and **Confirm password** fields. The SQL account is used to create the database, and thus Qdabra recommends granting sysadmin rights. Once the database is created and installation has completed, the user rights can be reduced to db_datareader and db_datawriter roles.
- Enter the **Database** where DBXL documents will be stored.

Installation of DBXL will fail and produce an error message when the database name entered contains a space. By default, the database names are **QdabraDBXL** and **QdabraUtility**. You may change these but you must use database names that do not contain spaces.

This tab contains one more option, **Use existing databases**. You only need to use this if you had a previous installation and want to reuse the same databases.



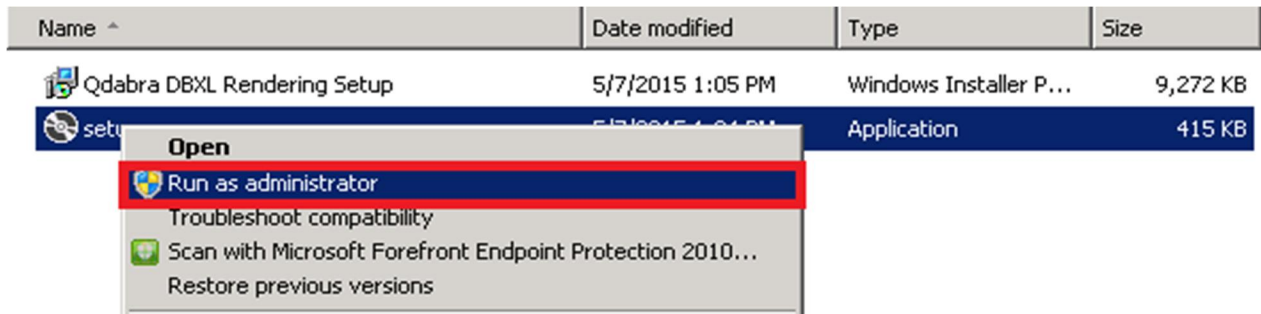
- Click on **Finish** to complete the installation.



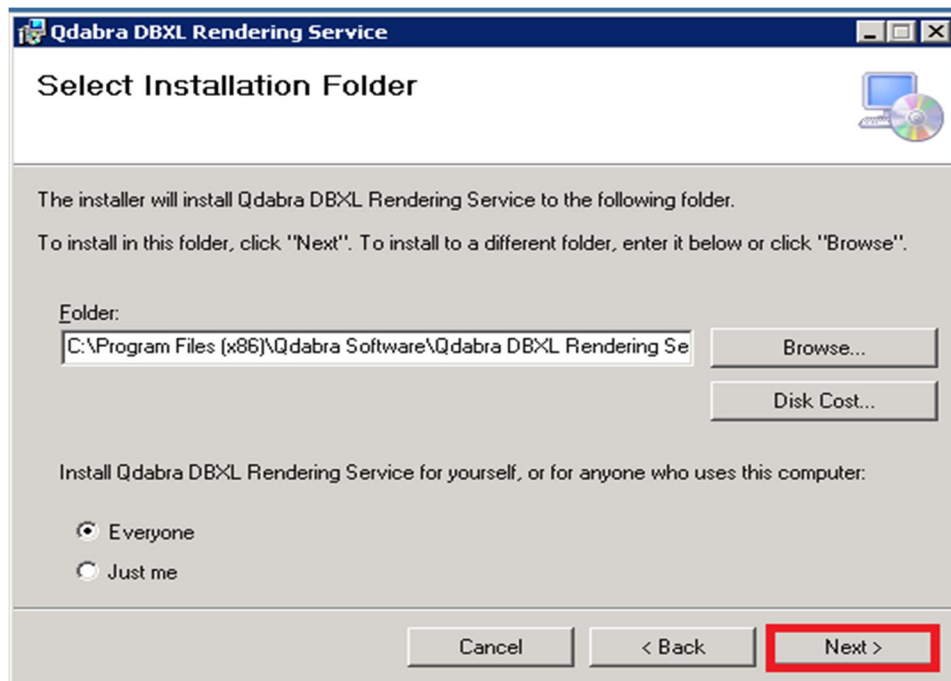
You will see another bar, called **Configuration Status**, indicating the progress of the installer. This status will change as the installation executes. When it finishes, click **Close** in the **Installation Complete** screen. Internet Explorer will open showing default.htm, from where you can access the **Forms**, **Documents** and **Web service descriptions**. We recommend adding a bookmark to this page (default.htm).

INSTALL QDABRA DBXL RENDERING SERVICE

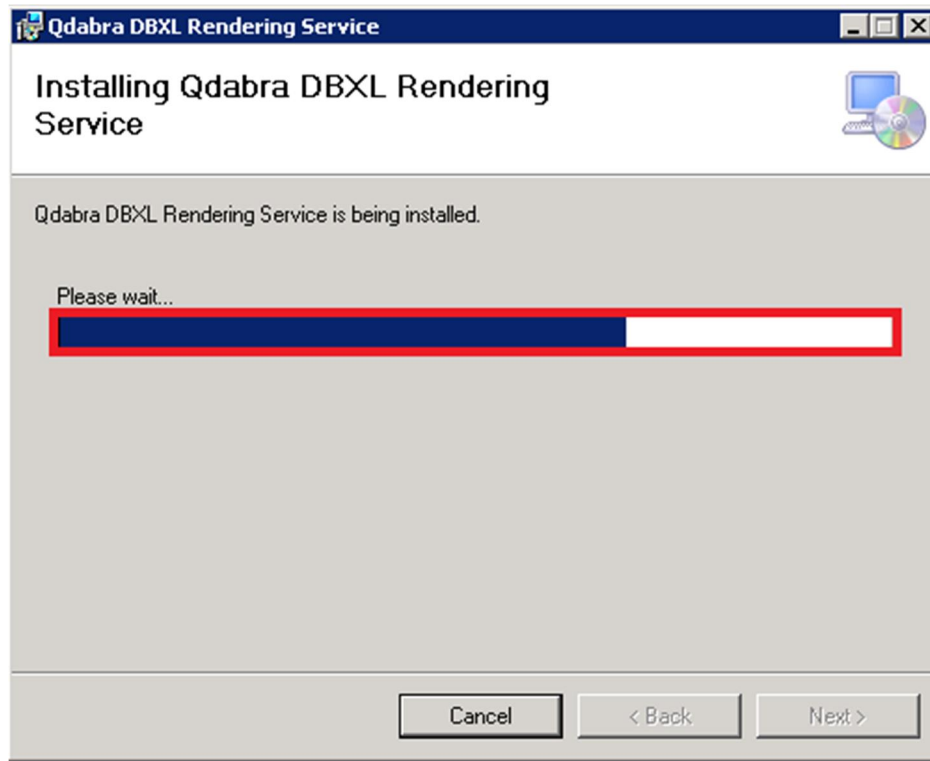
- Right click on setup.exe and select Run as Administrator



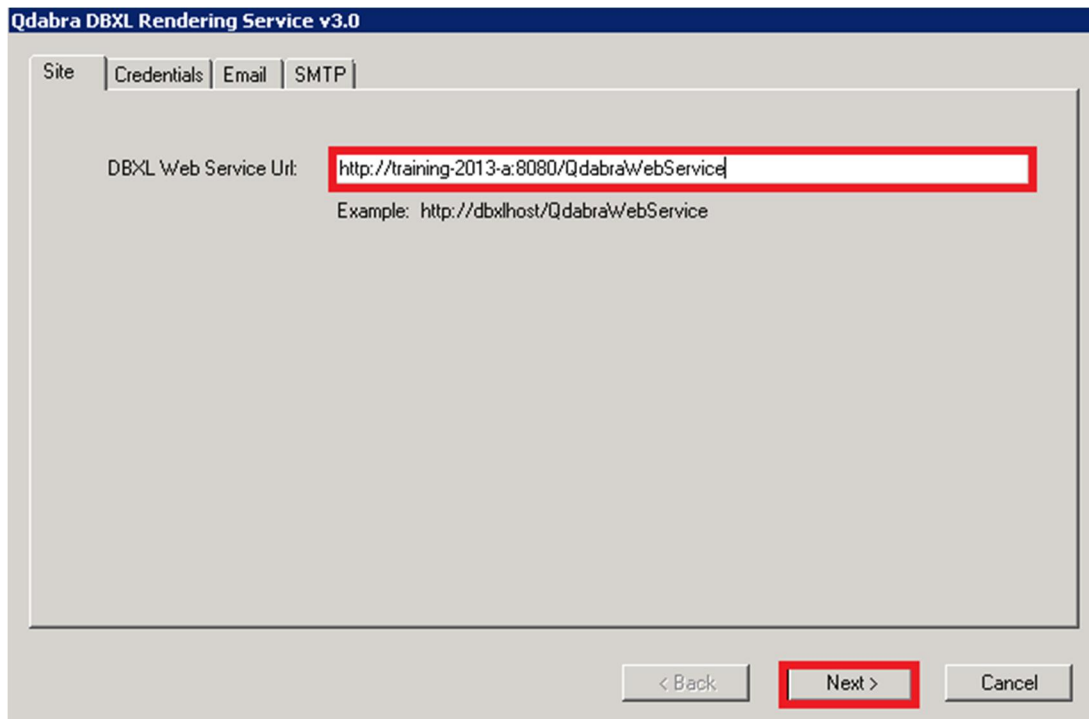
- Click **Next** in the Welcome screen.
- Select the Installation Folder location (the installer selects the existing Qdabra Software folder location by default: C:\Program Files (x86)\Qdabra Software\Qdabra DBXL Rendering Service\). Click **Next**.



- Click **Next** to confirm the installation.



- Enter the DBXL Web Service URL. Click **Next**.



- Select between Predefined and Configurable account credentials.
 - If you select Predefined, you will not need to provide credentials.

Qdabra DBXL Rendering Service v3.0

Site | Credentials | Email | SMTP

The Qdabra™ Rendering Service will run under these account credentials. This account must have DBXL Administrator permissions. You can change this account after installation in the Windows service applet.

Predefined Network Service

- If you select Configurable, you must provide an Account and Password.

Configurable

Account:

Password:

- Click **Next** to proceed to the following tab.
- Configure the Email settings:

Qdabra DBXL Rendering Service v3.0

Site | Credentials | Email | SMTP

Default values for email notifications.,

From

Email Address:

Display Name:

Lock

Subject:

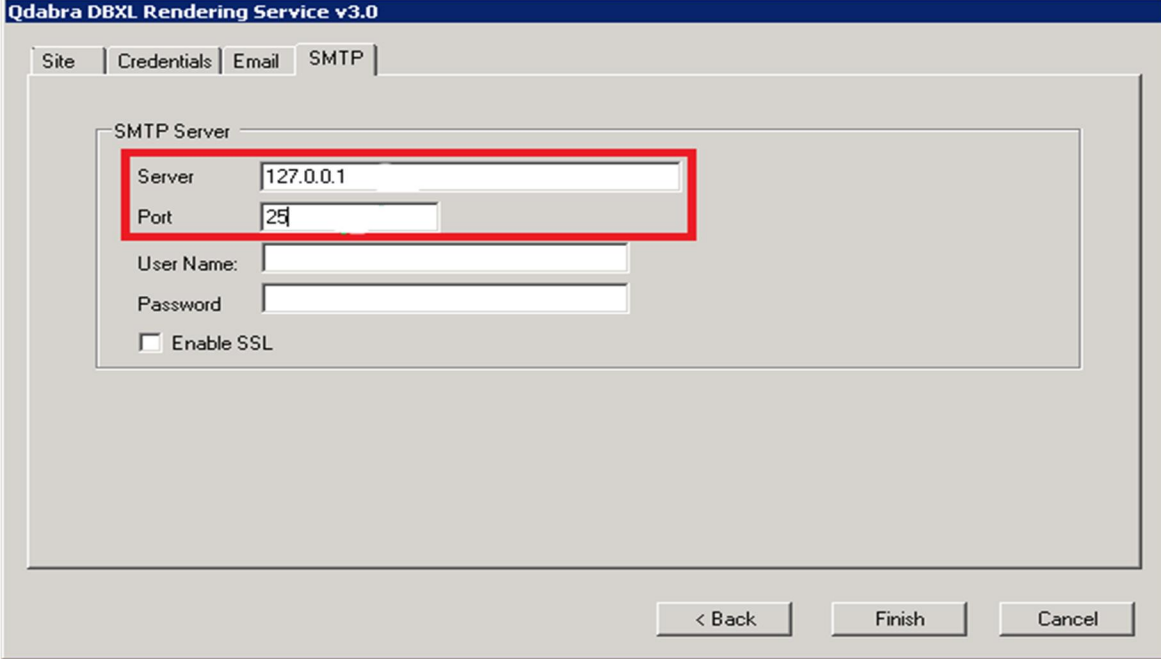
Body

Body is HTML

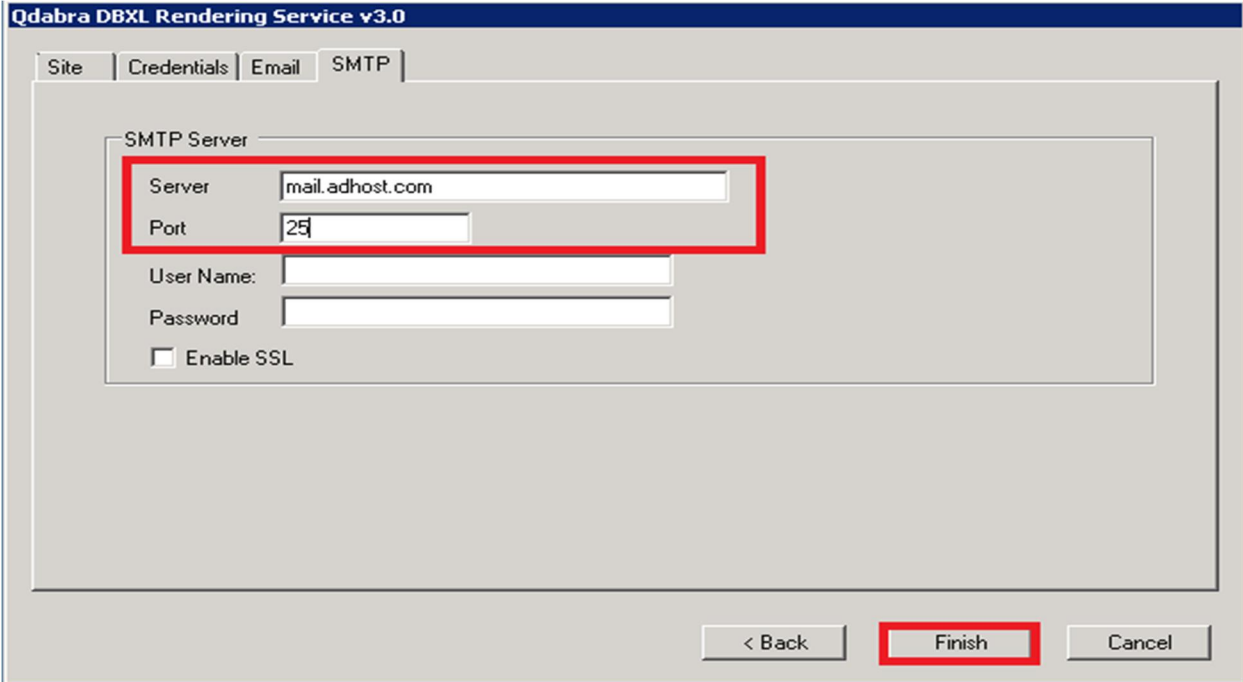
< Back Next > Cancel



- Click **Next** to proceed to the next tab.
- Configure the SMTP settings:
 - If it is on a local machine then the Server Name is - 127.0.0.1

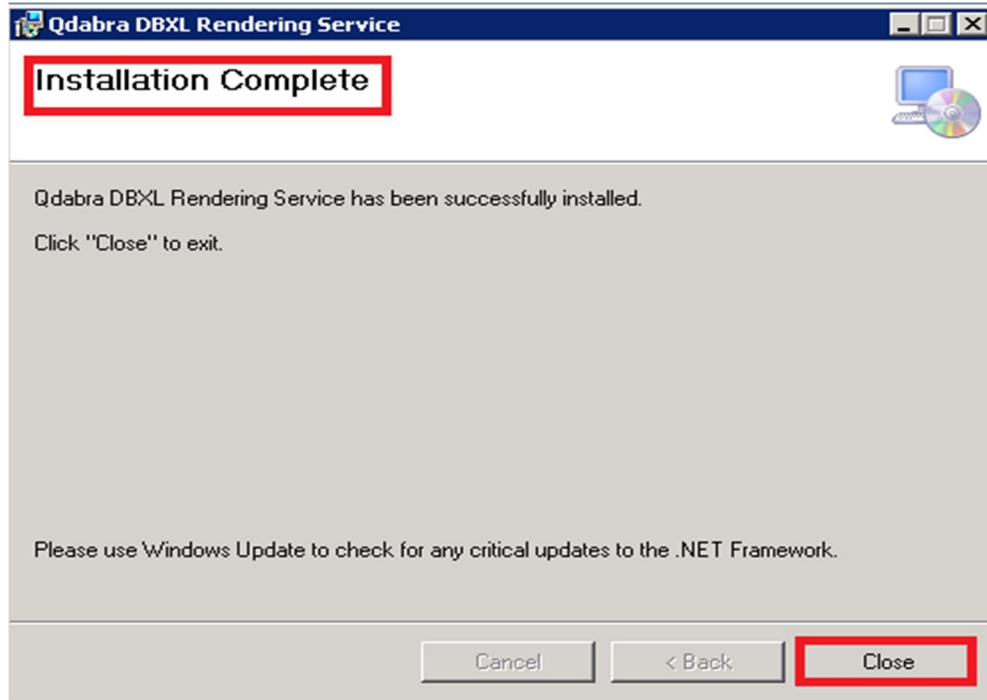


- Otherwise, Add your own Server name. For example, I used my server name (mail.adhost.com).



- Click **Finish** to complete the installation process.





- Close the installation wizard.

At the DBXL Administration Tool, the QdRender and QdRenderingMapping DocTypes should now be existing:

DATABASE ACCELERATOR
Administration Tool

🔑 Configure Licenses
📄 New Configuration 🔄 Refresh List 🌐

Document Type Configuration						
Name	Descriptions ◀	Form Version	Docs	Edit	Del	Open
QdExpenseReport - Sample		1.0.0.4	4			
QdRender		1.0.0.7	0			
QdRenderMapping		1.0.0.24	0			

System Document Types

Powered by: Qdabra® Database Accelerator
Copyright © 2008 Qdabra Software. All rights reserved. Qdabra and the Qdabra logo are trademarks of Autonomy Systems LLC. www.qdabra.com
English ▾

Web Service URL: <http://SHP2010-DEV1:8181/QdabraWebService/DbxlDocumentService.aspx>

DBXL Version: 3.0.2015.0205

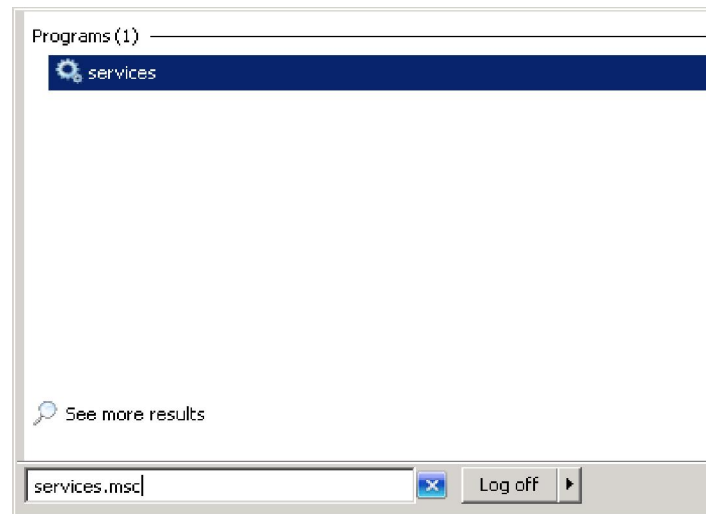
Form Version: 2.9.0.0

User: dlambatin

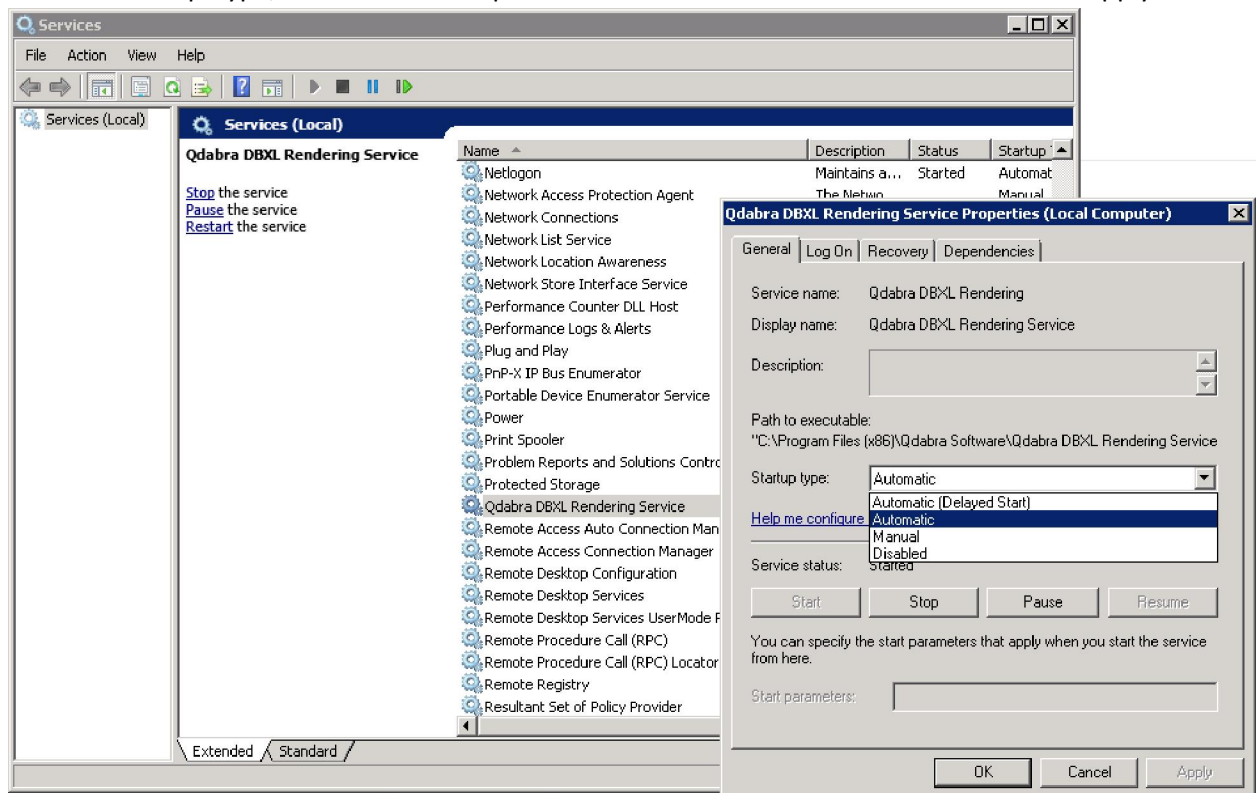


START QDABRA DBXL RENDERING SERVICE

- Open the Start Menu, type services.msc in the search box, press Enter:



- If prompted by UAC, then click on Yes.
- Right click on the Qdabra DBXL Rendering Service > Properties.
- Next to Startup type, click on the drop down menu and select Automatic and click Apply.



- Click on the Start button.

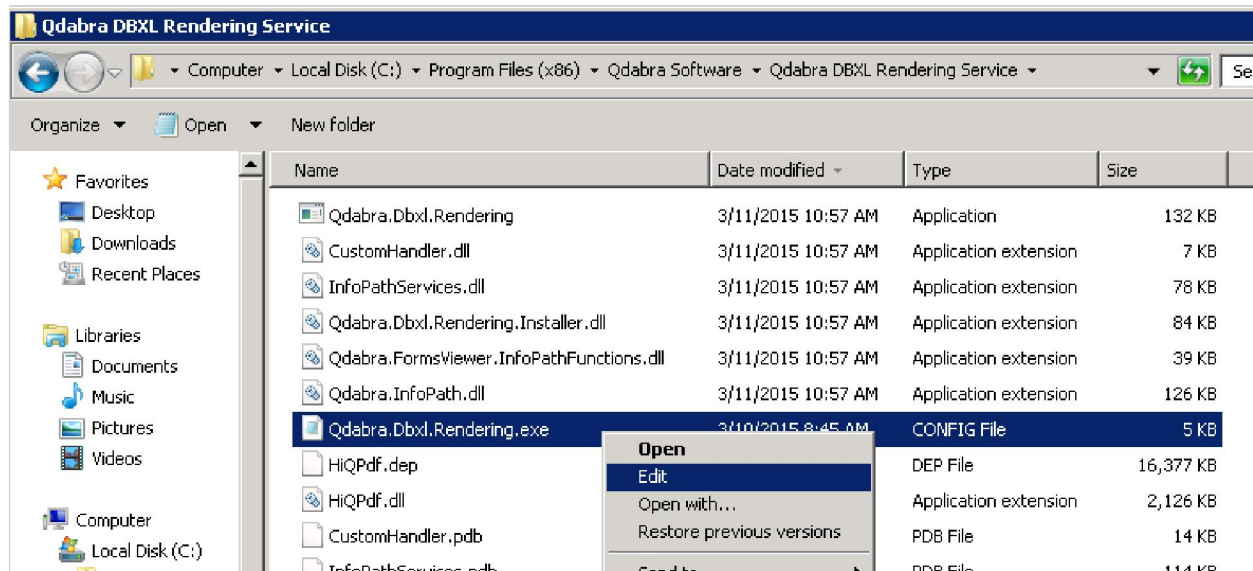


NOTE: If the Start option is grayed out and will not start, then you will need to restart the computer to start it after you set it to Automatic and clicked OK.

EDITING THE QDABRA.DBXL.RENDERING.EXE.CONFIG

In the event that the DBXL Rendering Service needs to be configured manually, follow the steps below:

- Locate the folder where DBXL Rendering Service is installed.
- Inside the Qdabra DBXL Rendering Service folder, edit the Qdabra.Dbxl.Rendering.exe.config using a text editor such as **Notepad**.



Here's how the Config file will appear in notepad:

```
<appSettings>
  <add key="XSNStoragePath" value="" />
  <add key="DBXL_URL" value="http://shp2010-dev1:8181/QdabraWebService" />
  <add key="ClientSettingsProvider.ServiceUri" value="" />

  <add key="Smtp_Servername" value="mail.adhost.com" />
  <add key="Smtp_Port" value="25" />
  <add key="Smtp_UserName" value="" />
  <add key="Smtp_SequenceNumber" value="" />
  <add key="Smtp_Password" value="" />
  <add key="Smtp_EnableSsl" value="false" />

  <add key="Email_Subject" value="Document Rendering" />
  <add key="Email_Body" value="Attached is the rendering of your document" />
  <add key="Email_BodyIsHtml" value="false" />
  <add key="Email_FromAddress" value="NoReply@qdabra.com" />
  <add key="Email_FromDisplayName" value="" />
  <add key="Email_FromLocked" value="false" />

  <!-- CustomHandler that will be called after rendering -->
  <add key="CustomHandler" value="CustomHandler.CustomRendering, CustomHandler" />
  <!-- -->

  <!-- Properties sepcific to the CustomHandler implementation -->
  <add key="PdfMetadataConnString" value="" />
  <add key="PdfOutputFolder" value="" />
  <add key="PdfFileNameXPath" value="" />
  <!-- -->

</appSettings>
```

Notice that the texts in red are the same values specified when Qdabra DBXL Rendering Service was installed.

Editing these values spontaneously updates the settings of the Qdabra DBXL Rendering Service.



CREATE A PDF MAPPING

- Click Edit Icon for the **QdRenderMapping** doctype.

Document Type Configuration

Name	Descriptions	Form Version	Docs	Edit	Del	Open
PDF_Test		1.0.0.5	1			
QdExpenseReport- Sample		1.0.0.10	9			
QdRender		1.0.0.7	5			
QdRenderMapping		1.0.0.24	3			

System Document Types

- Double click the **QdRenderMapping.xsn**

Document Type Details

Name	Solution Group
QdRenderMapping	

Description

Last Modified By
AUTONOMYSYSTEMS\dlambatin

InfoPath Form Template

Form Template Properties
<p>Form Version: 1.0.0.24</p> <p>Last Modified: 3/31/2015 6:11:44 AM</p> <p><input type="checkbox"/> Form template is signed</p> <p><input type="checkbox"/> URN-based solution</p>

URL to Form Template
<http://SHP2010-DEV1:8181/QdabraWebService/Forms/ID/298/template.xsn>

- Once the form opens, indicate a mapping name if desired.
- Select a **Target Document Type** from the dropdown
- Click **Load Information** – this should display the configuration section for the PDF mapping



View

Select the view that you want to use for rendering.

▼

When to Render

When should a form be rendered as a PDF?

When a new document is submitted
 When an existing document is modified

Additional condition that must evaluate to **true** (leave blank if no additional condition):

How to Save Rendering

When should a form be rendered as a PDF?

Save as QdFile and send Email with link
 Send Email with Attachment

PDF Naming

Naming expression

Email

Subject

Is Expression

Body

Is HTML Is Expression

From Address

Please indicate who should be shown as the sender of the rendered e-mails.

Use Static Values
 Determine values dynamically (XPath)

E-mail address: Display name (optional):

To Addresses

You can indicate static values for the recipients of the e-mails, determine them dynamically using XPath, or both.

Static Values

E-mail Address: Display Name (optional):

▼ Insert item

Dynamic Values

XPath to e-mail address(es): XPath to display name(s) (optional, relative to e-mail field):

CC Addresses (optional)

You can indicate static values for the recipients of the e-mails, determine them dynamically using XPath, or both.

Static Values

E-mail Address: Display Name (optional):

▼ Insert item

Dynamic Values

XPath to e-mail address(es): XPath to display name(s) (optional, relative to e-mail field):

BCC Addresses (optional)

You can indicate static values for the recipients of the e-mails, determine them dynamically using XPath, or both.

Static Values

E-mail Address: Display Name (optional):

▼ Insert item

Dynamic Values

XPath to e-mail address(es): XPath to display name(s) (optional, relative to e-mail field):

Save



The fields above should be self-explanatory, but in order to create a basic PDF mapping for testing purposes, follow the configuration below:

- Select a View to be printed in PDF
- Specify when PDF rendering should be triggered.
- Specify how PDF Rendering is saved.
- Enter a default Subject and Body for the email (can use an Expression)
- Specify a sender
 - Static: Uses hardcoded data (i.e John@email.com)
 - Dynamic: Uses an xpath (i.e. /my:myFields/my:Email)
- Specify Recipients – Static data or Dynamic
- Click **Save** button.

Notes:

- Specifying a Mapping name helps identifying the mappings easier – greatly helps if you are dealing with multiple doctypes.

The screenshot shows the 'Documents' tab in the Qdabra software. It includes sections for 'Export Documents', 'Import Documents', and 'Query Documents'. The 'Query Documents' section has a search bar with 'Starting Doc. ID: 346', 'Ref. ID: 1', and 'Range: 20'. Below this is a table of documents:

Doc. ID	Ref. ID	Version	Name	Author	Description	New	
346	12		Test		Mapping for PDF_Test	Open	<input type="checkbox"/>
354	14		QdExpenseReport PDF Mapping		Mapping for QdExpenseReport-Sample	Open	<input type="checkbox"/>
366	15		NFPA TEST		Mapping for NFPA25-AES21-QUARTERLYANNUALWETPIPE	Open	<input type="checkbox"/>

- Updating the DocType for PDF Printing requires restarting the service – see [Start Qdabra Dbxl Rendering Service](#)
- Uninstalling the PDF Rendering service:
 - Stop the service at Services Console
 - Uninstall the program from Control Panel by running the uninstallation wizard
- Reinstallation
 - If you encounter a “Service Already Exists” error, run command prompt as administrator and execute the command:

sc delete “Qdabra DBXL Rendering”



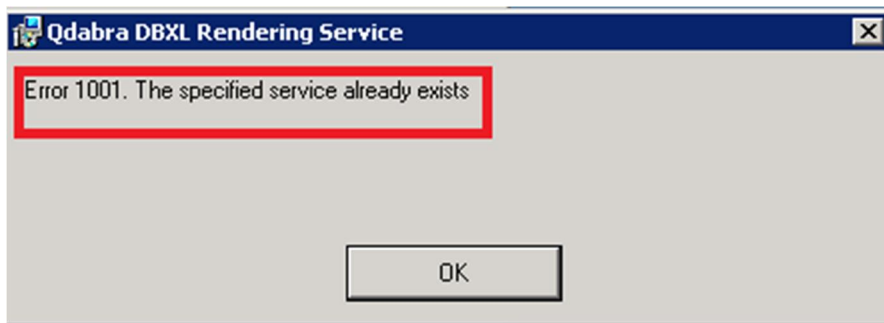
ADDITIONAL STEPS FOR INSTALLING ON AZURE:

1. Create a pdfsvc account
2. Change account used by PDF service
3. Add pdfsvc to DbxlAdmins
4. Grant full permissions to pdfsvc account on “C:\program files(x86)\Qdabra Software\Qdabra DBXL Rendering Service\”
5. Change the PDF service to “Automatic (Delayed Start)”
6. Change the SMTP port # to 587 (from 465)
7. Start the service

ADDITIONAL STEPS TO TROUBLESHOOT ERRORS:

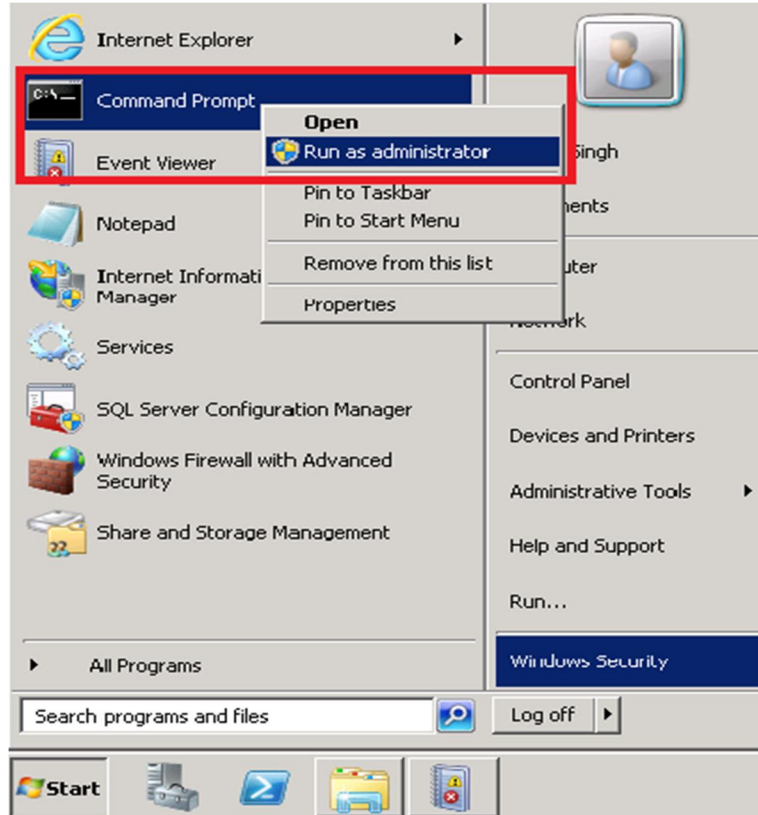
“ERROR 1001” DURING DBXL RENDERING INSTALL:

While installing DBXL Rendering Service if you get the “Error 1001” as shown below, please perform the following additional steps:

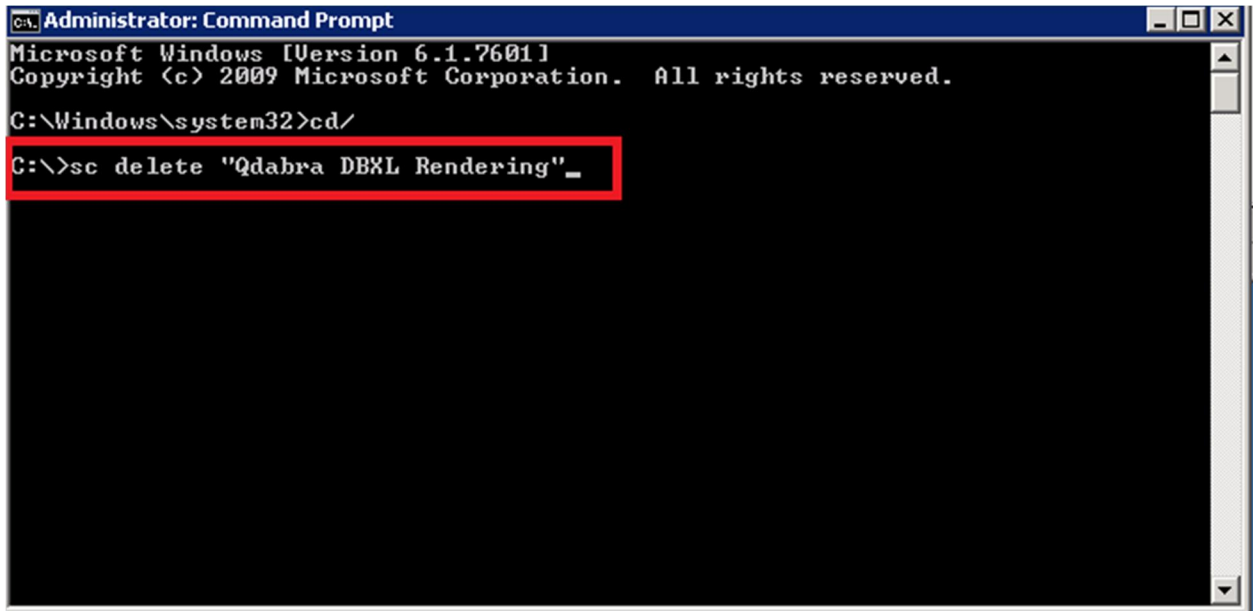


- Go to the “START” menu, right-click on the *Command Prompt* and select “*Run as administrator*”.





- On Command Prompt window, type the following command: **sc delete "Qdabra DBXL Rendering"** and press ENTER.

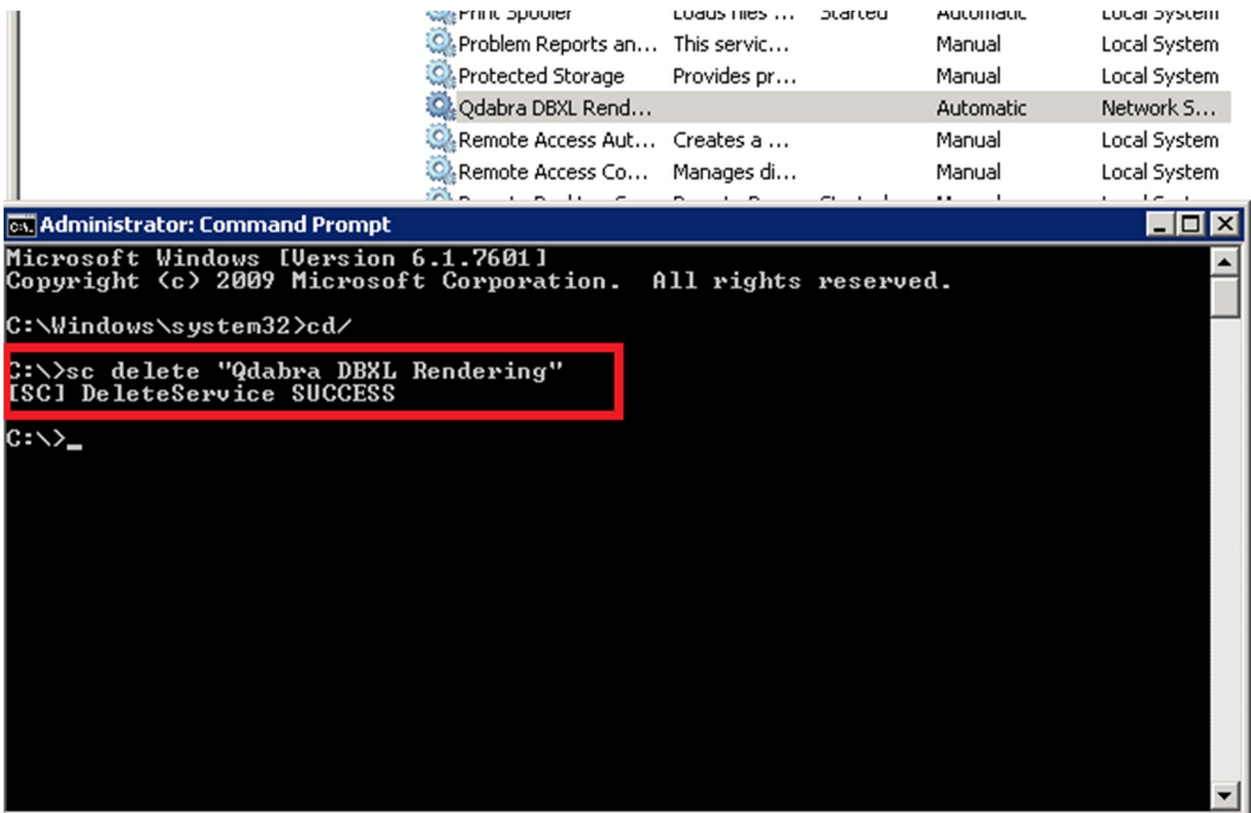
A screenshot of an Administrator Command Prompt window. The title bar reads 'Administrator: Command Prompt'. The window content shows the following text:

```
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

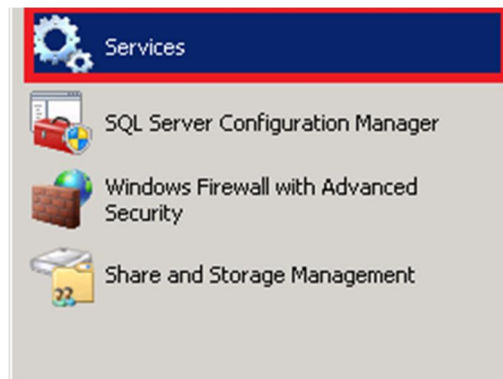
C:\Windows\system32>cd/
C:\>sc delete "Qdabra DBXL Rendering" _
```

The command 'sc delete "Qdabra DBXL Rendering"' is highlighted with a red rectangular box.

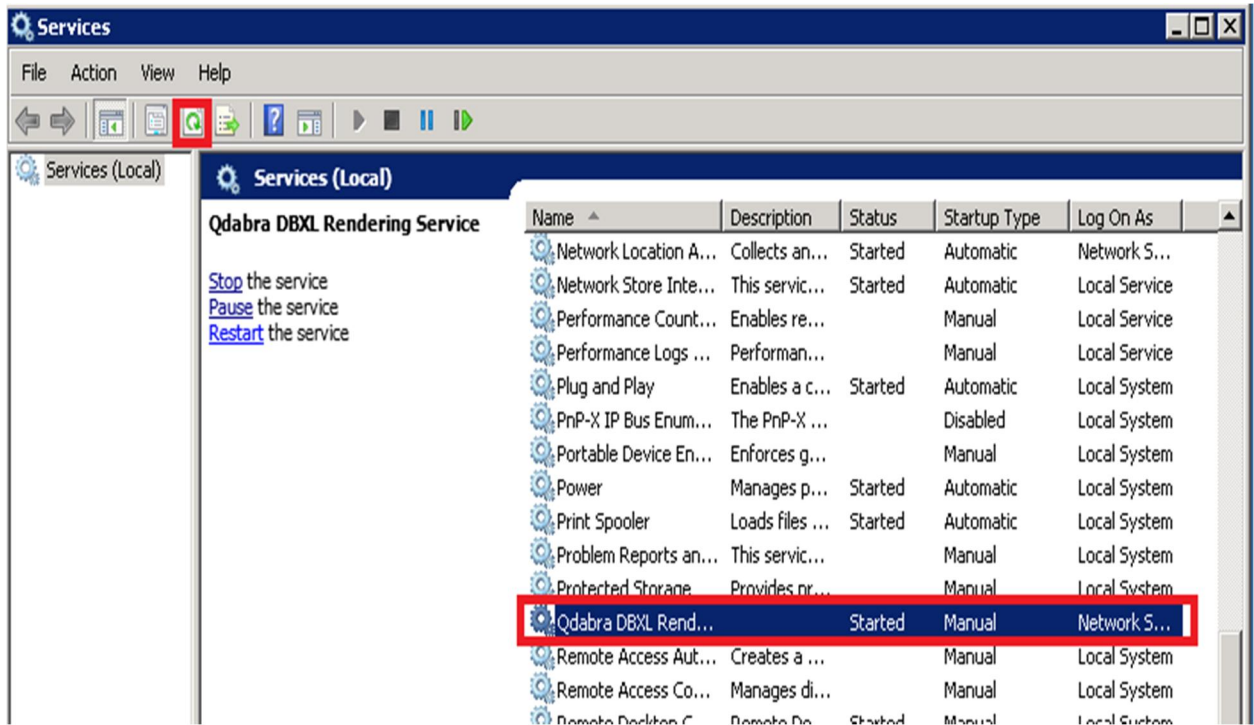
- You should see a Success message that verifies that the Service has been deleted successfully.



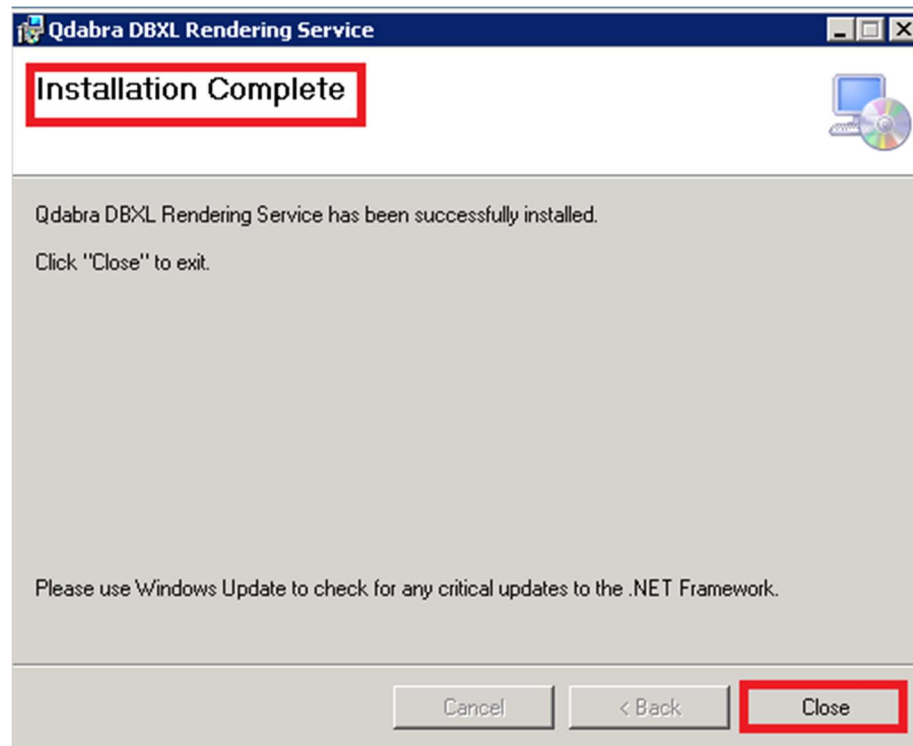
- Open "Services" from the **Start** menu and navigate to the "Qdabra DBXL Rendering service".



- Click on **Refresh** icon on the top left side of the 'Services' window.



- Follow all the steps to install DBXL Rendering Service as described earlier in the document.
- When the Installation is successful, you will see the following window:

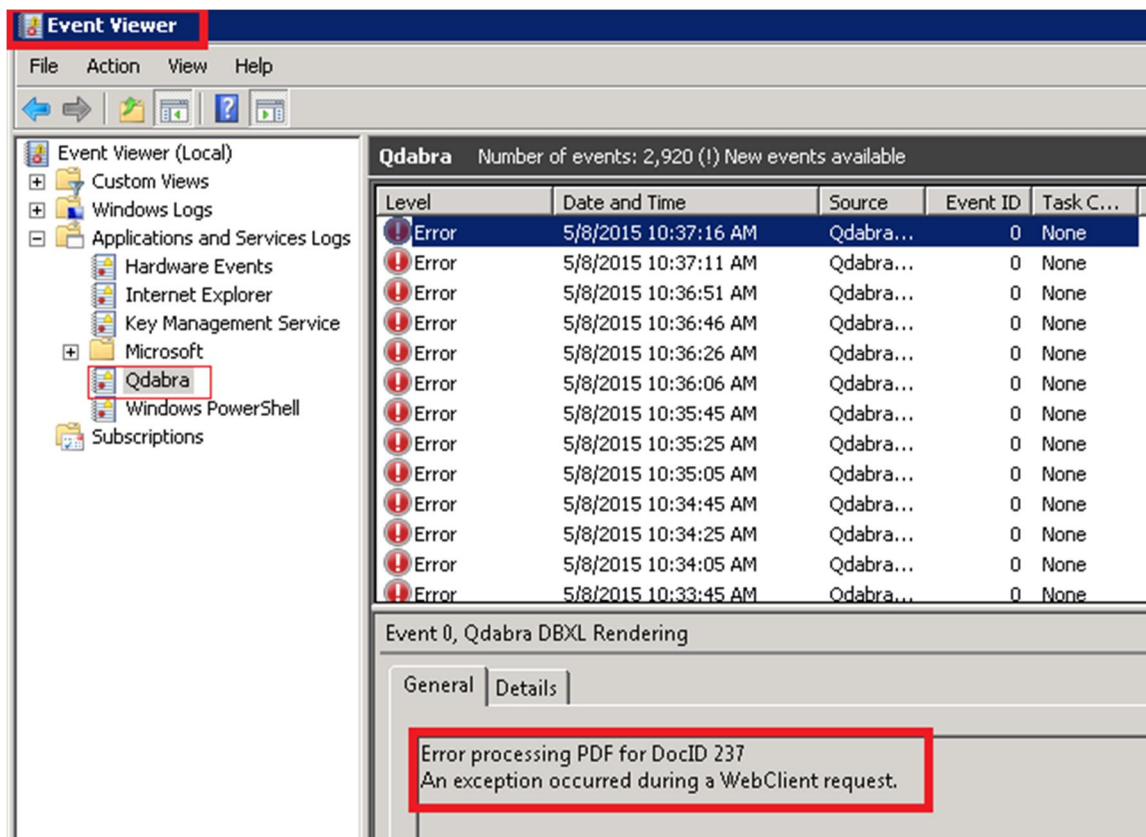


- Click on **Close**.

“ERROR PROCESSING PDF FOR DOCID”:

After installing DBXL Web Service and Rendering Service, create a PDF Mapping following the steps described in this document.

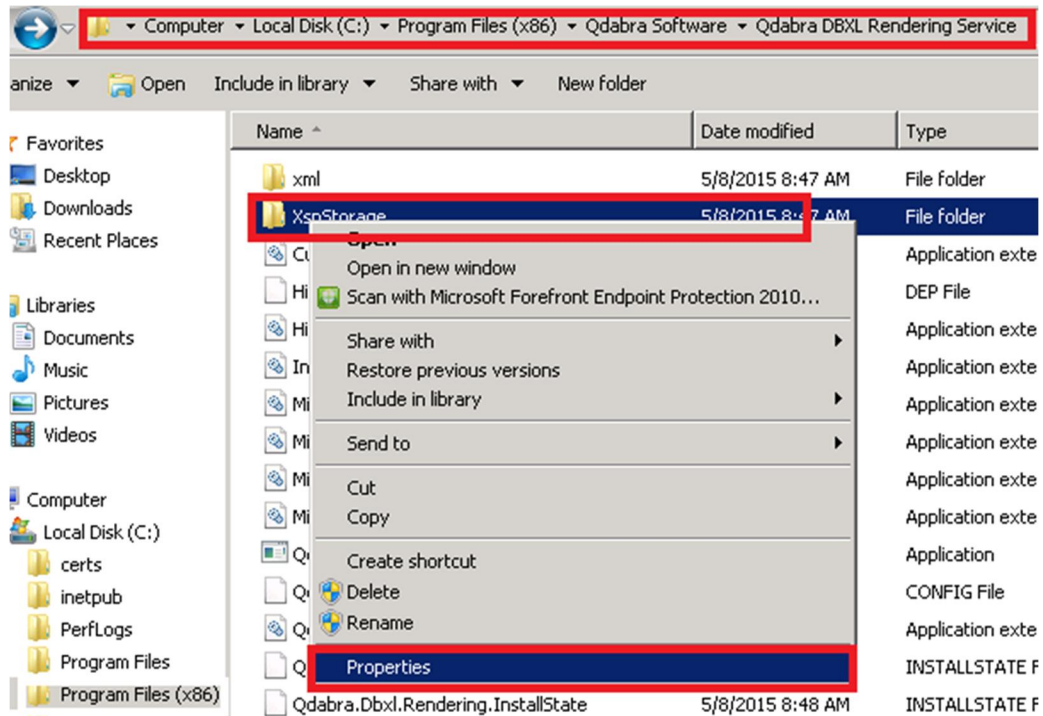
- Open the Sample Expense Report form, enter the values including email address of the recipients (you can give your Outlook address to verify it) and click on **Submit**.
- To verify that PDF Rendering is working correctly, open the **Event Receiver** on the machine where you installed DBXL Rendering service.
- If you get the error message- “**Error Processing PDF for DocId**”, please perform the following additional steps:



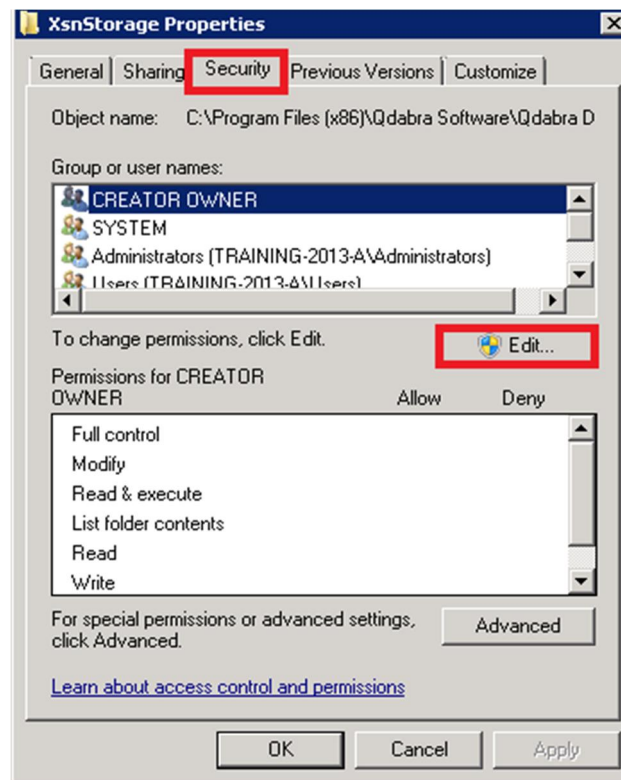
- Navigate to the Parent folder from Windows Explorer, i.e. **C:/Program Files(x86)/Qdabra Software/Qdabra DBXL Rendering Service/**.



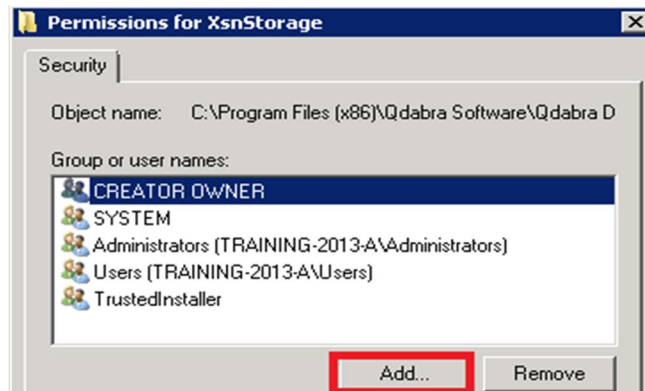
- Right-click on the XsnStorage folder and select **Properties**.



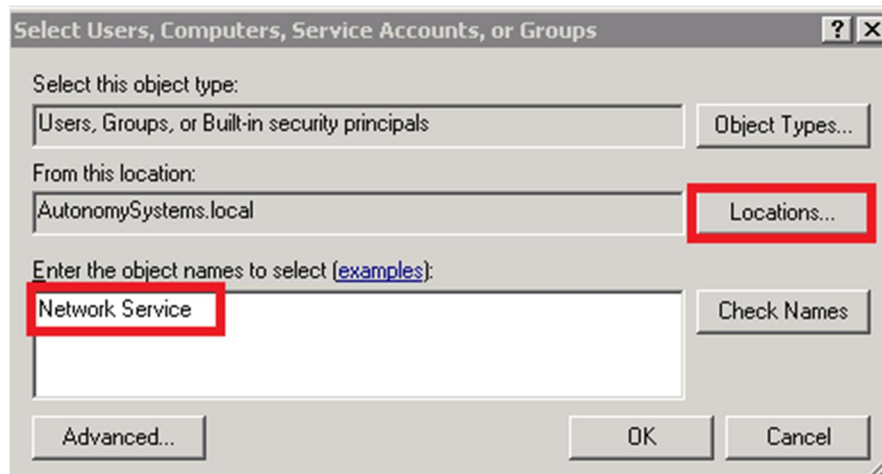
- On the “XsnStorage Properties” window, click on **Security** tab and click **Edit**.



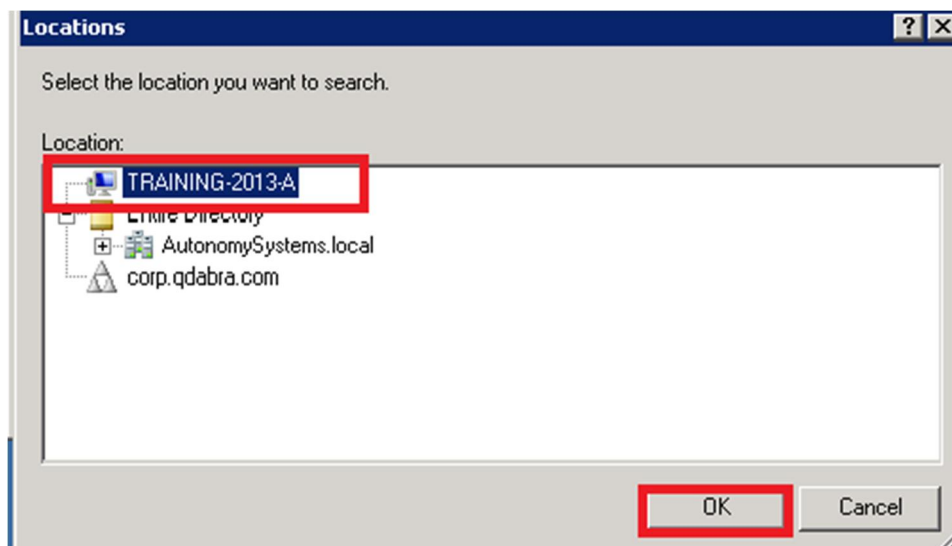
- On the next window click on **“Add”**.



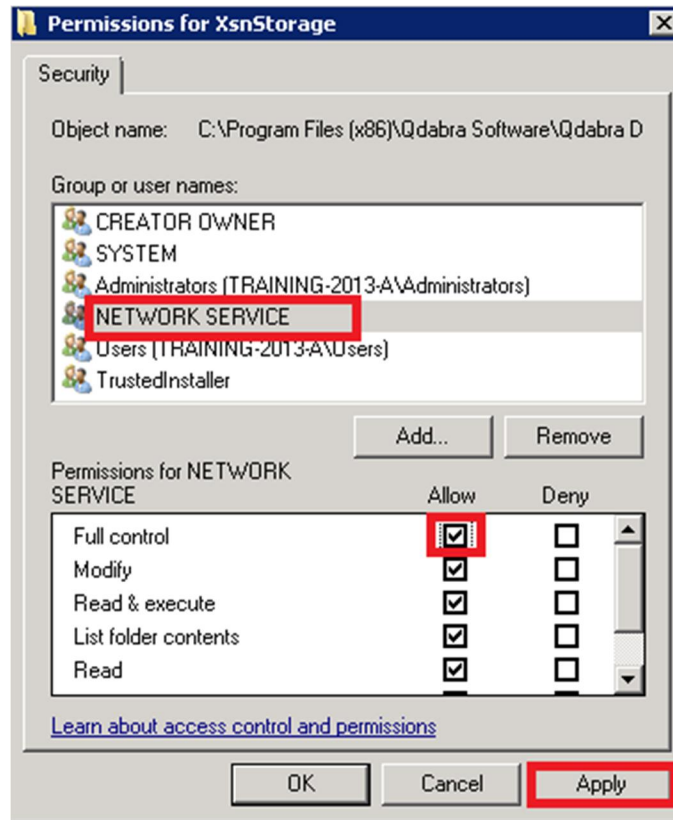
- On the next window, give **“Network Service”** as the object name. Click on **Locations**.



- Change the location to your local machine. Click **OK**.



- Select NETWORK SERVICE and check the Full Control box. Click **Apply**.



- Click **OK** to close all the windows.



- Now, submit a document from the DAT by giving the emails of the recipients (give your email address to verify).

EXPENSE REPORT

Report Date: Expense Code: Start Date: End Date:
 Business Purpose:

Employee Information

Name: Title:
 Department: ID Number:
 E-mail Address:

Manager Information

Name: E-mail Address:

Itemized Expenses

Date	Description	Category	Cost
5/8/2015	Chocolates	Gifts	80.00
5/8/2015	Coffee	Morale	20.00
5/8/2015	Headset	Office supplies	120.00
Subtotal			220.00
Less cash advance			0.00
Total expenses			220.00

Add Expense

Item Details

- You should see an email with the PDF of the form you just submitted.

Deleted Items

- Prachi.Singh@Qdabra.com
- Inbox 1**
- Qdabra@mcafee
- Support
- Drafts [2]
- Sent Items
- Deleted Items
- Hightail Outbox
- Junk E-Mail
- MY SERVICES
- Outbox
- RSS Feeds
- Search Folders

NoReply@qdabra...
 Hello World! 11:22 AM
 Qdabra Rocks! <end>

NoReply@qdabra...
 Hello World! 11:16 AM
 Qdabra Rocks! <end>

NoReply@qdabra...
 Hello World! 11:16 AM
 Qdabra Rocks! <end>

NoReply@qdabra...
 Hello World! 11:16 AM
 Qdabra Rocks! <end>

noreply@infopath...
 Re: Convert *.xml from ... 11:09 AM
 Re: Convert *.xml from a

Formsboard Notif...
 Tasks: Kathleen Harford... 10:53 AM
 Hello,

Formsboard Notif...
 Customer Support: Kat... 10:53 AM
 Hello,

Kathleen Harford
 Re: Follow-up: Support... 10:31 AM
 Hi Prachi, it was

noreply@infopath...
 Re: Submit via Web Ser... 10:17 AM

Message

EXPENSE REPORT

Report Date: Expense Code: Start Date: End Date:
 Business Purpose:

Employee Information

Name: Title:
 Department: ID Number:
 E-mail Address:

Manager Information

Name: E-mail Address:

Itemized Expenses

Date	Description	Category	Cost
5/8/2015	Chocolates	Gifts	80.00
5/8/2015	Coffee	Morale	20.00
5/8/2015	Headset	Office supplies	120.00
Subtotal			220.00
Less cash advance			0.00
Total expenses			220.00

Item Details



CONTACT INFORMATION

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