

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 v3.1.

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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 v3.1

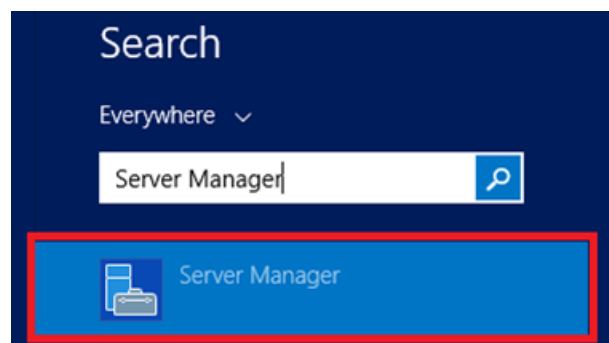
This guide assumes that the SMTP Service of the Internet Information Services (IIS) is installed and configured on your server in order to send e-mail from an ASP.NET Web application.

Please proceed to the next section if IIS SMTP Service is already installed and configured. Otherwise, follow the steps below.

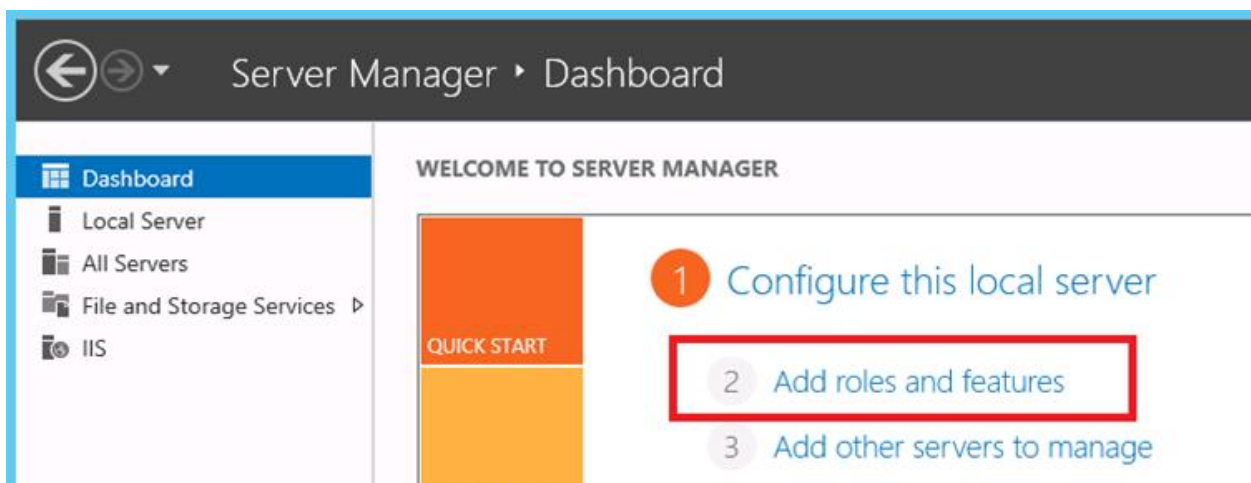
Installing the SMTP Service

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

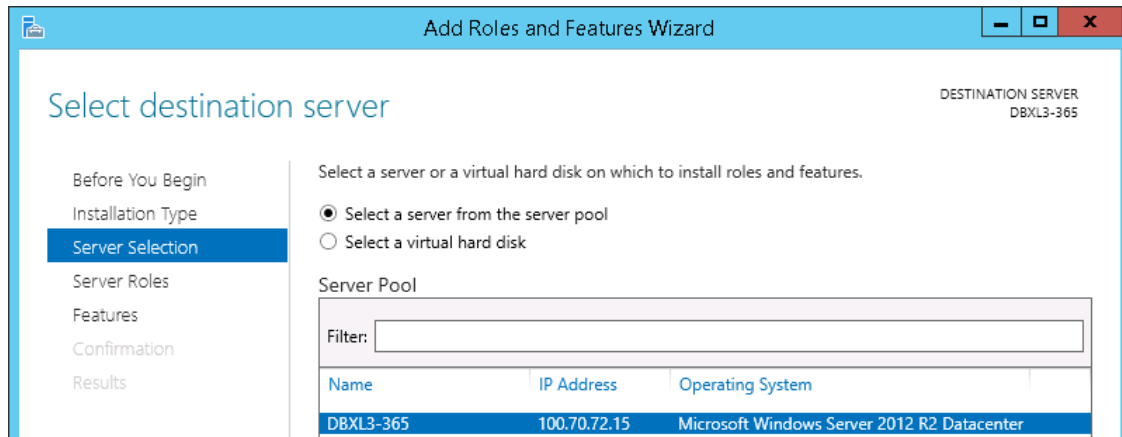
- On the Start menu, click the Search icon, type in **Server Manager**, and then click Server Manager App:



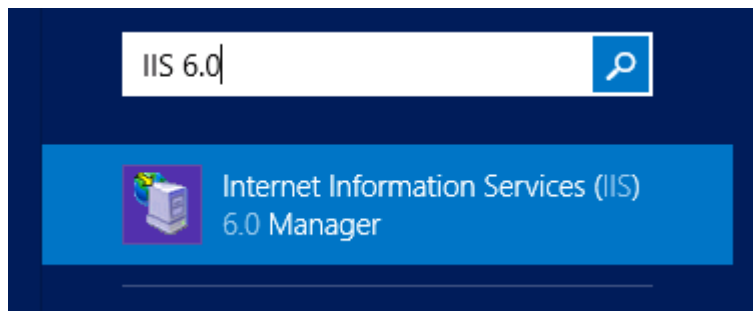
- At the Server Manager – Dashboard page, click **Add roles and features**:



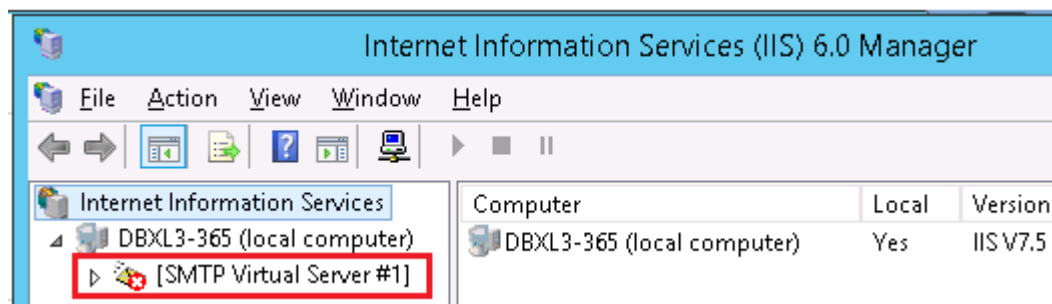
- Click **Next** on the *Before You Begin* page.
- Select *Role-based or feature-based installation* and click **Next**.
- Select a desired server and click **Next**.



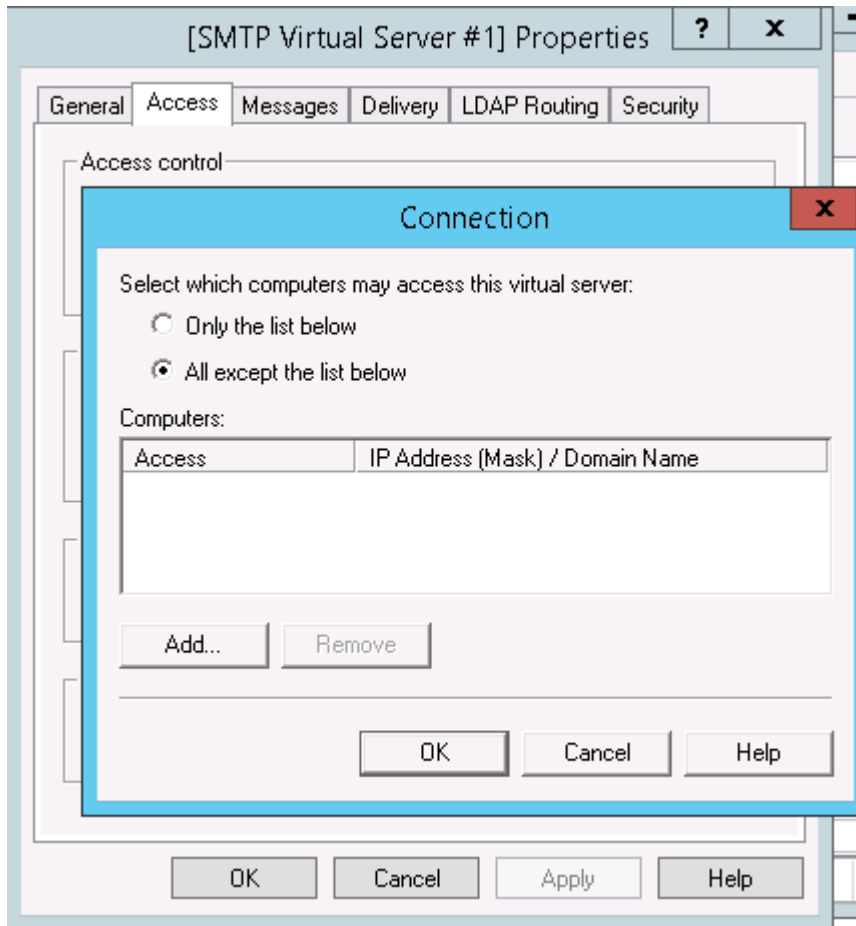
- At the *Server Roles* section, tick **Web Server** (add/install feature if not yet installed) and click **Next**.
- Tick SMTP and install.
- After the installation, open the Start Menu. Type in IIS 6.0 Manager in the search box, and click to run the program:



- Right Click on SMTP Virtual Server and click properties.



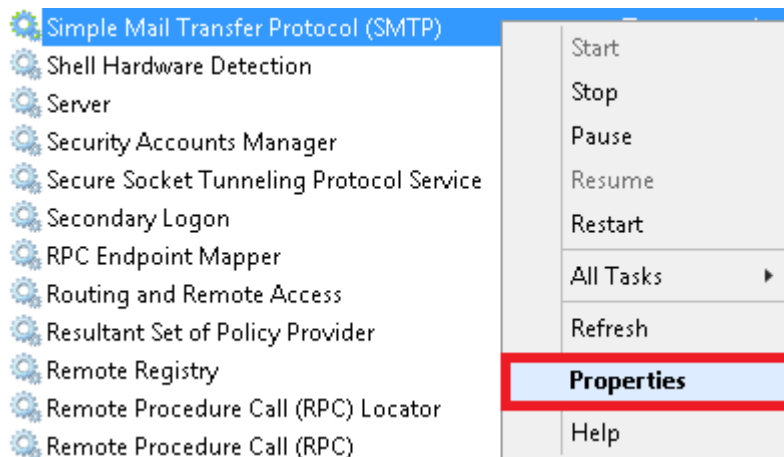
- Pick the VMs local IP address (Should be only one in drop down)
- Click Access Tab.
- Click the "Connection" button under Connection control and select "All Except the list below" and click OK.



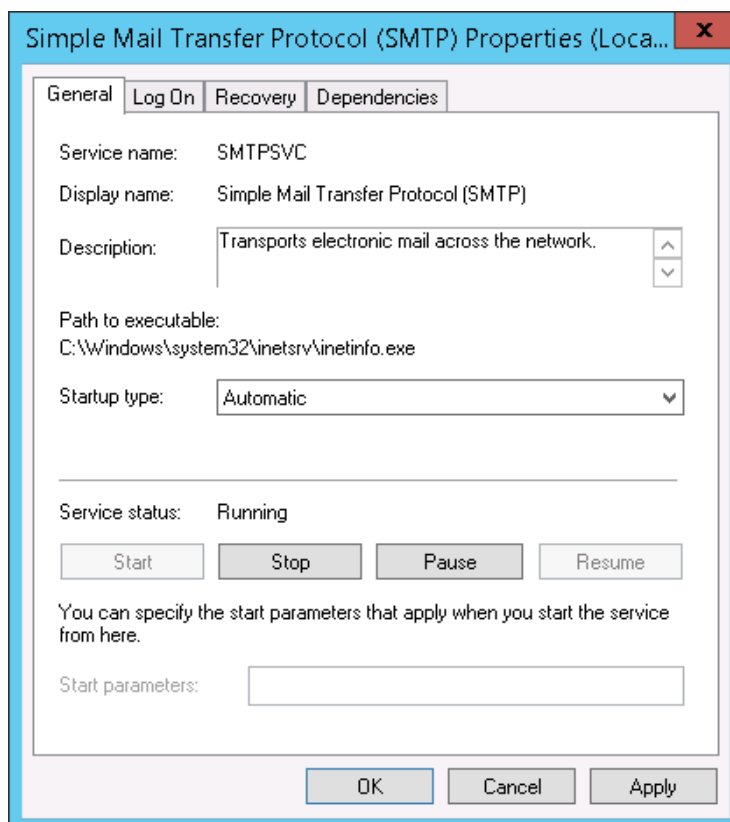
- Click **Apply** and **OK**.
- Open the Start Menu, type in Services in the search box, and click to run the program:



- Right Click "Simple Mail Transfer Protocol" and click properties.



- Set the startup type to Automatic. Then click **Apply** and **OK**.



- Stop and Start the Service.



- Click **OK**.

DBXL Administration Tool v3.1

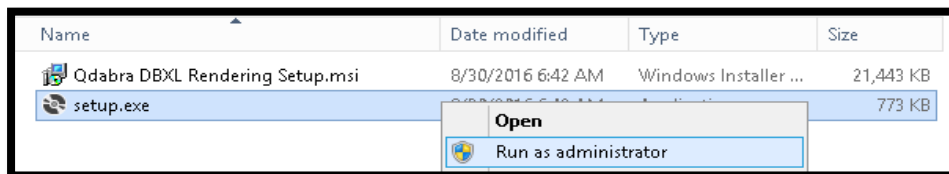
Another requirement for the DBXL Rendering Service is DBXL Administration Tool v3.1 – which will allow the PDF Rendering feature to run.

To install Qdabra's DBXL v3.1 client, kindly download the trial version [here](#), and follow the steps from this guide: [DBXL v3.1 Installation Guide](#).

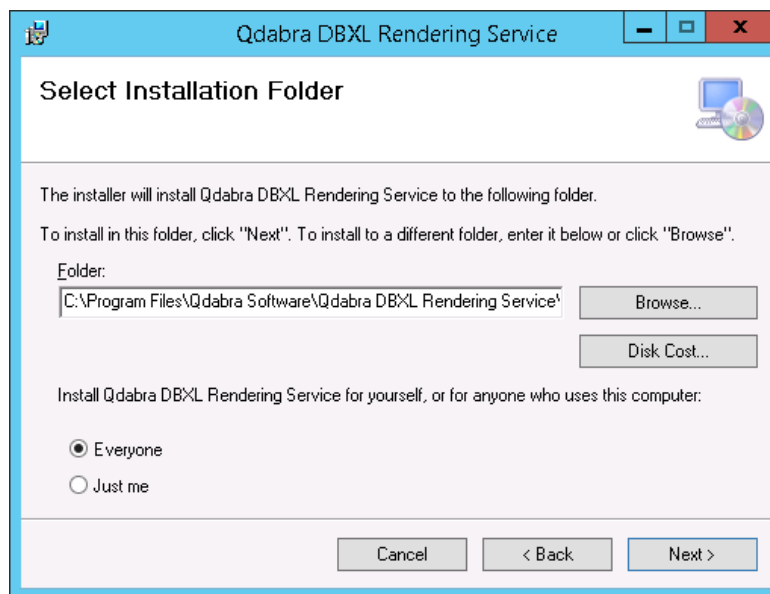
In the event that DBXL v3.1 is already installed, please proceed with installing the Qdabra DBXL Rendering Service.

INSTALL QDABRA DBXL RENDERING SERVICE

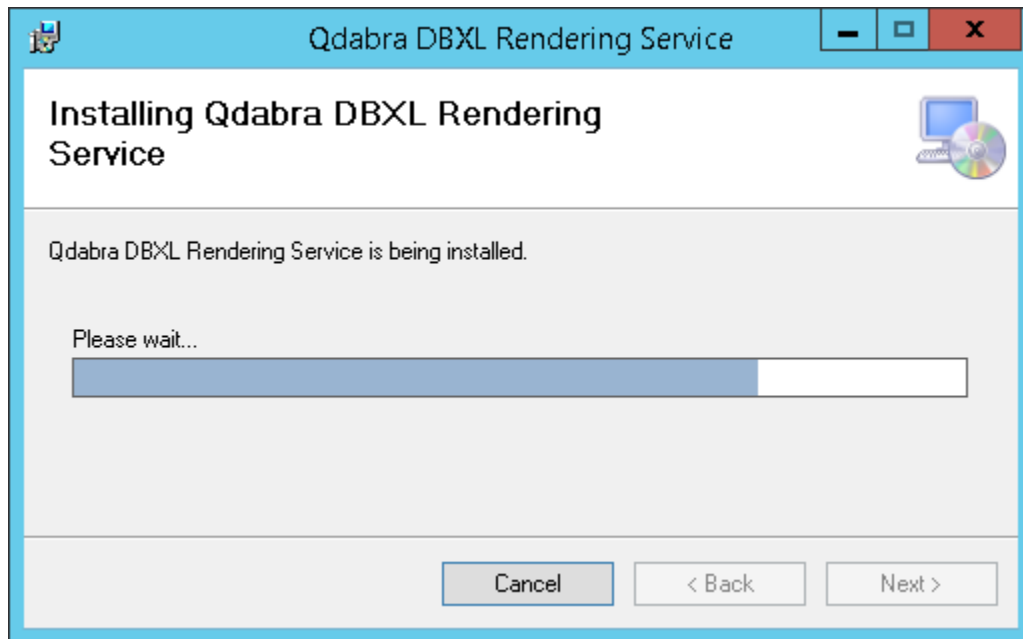
- Right click on setup.exe and select Run as Administrator



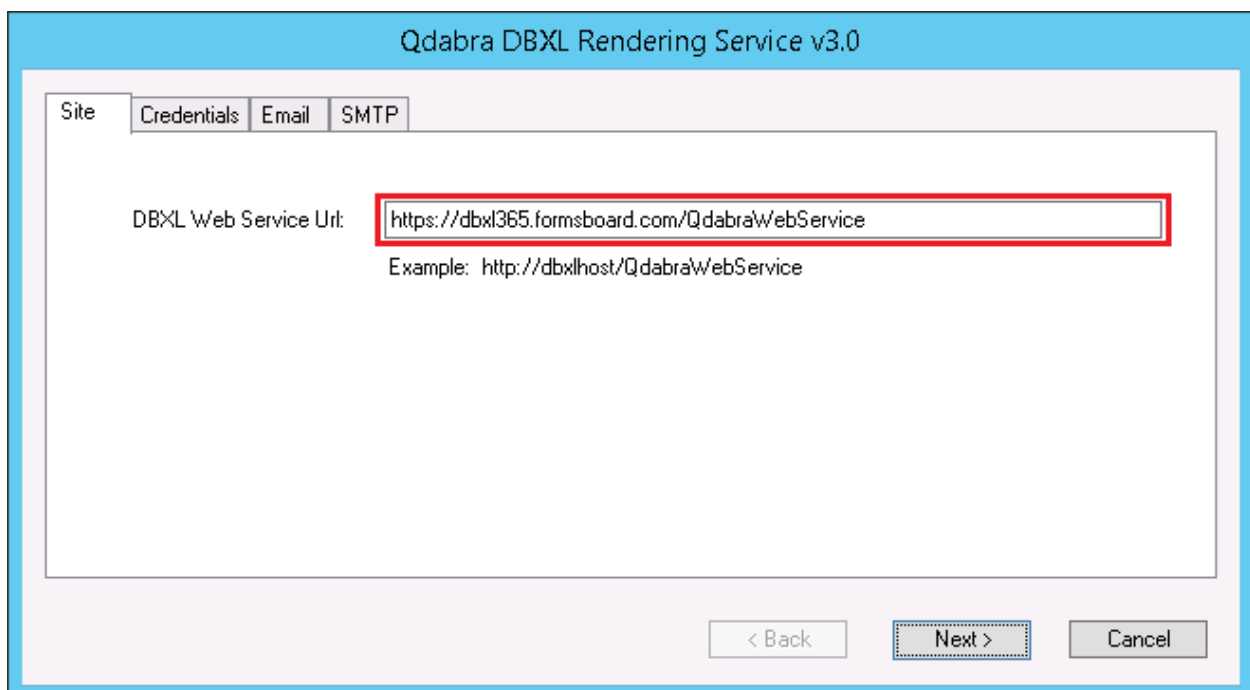
- Click **Next** in the Welcome screen.
- Select the Installation Folder location (the installer selects the existing Qdabra Software folder location by default: C:\Program Files (x86)\Qdabra Software\Qdabra DBXL Rendering Service\). Click **Next**.



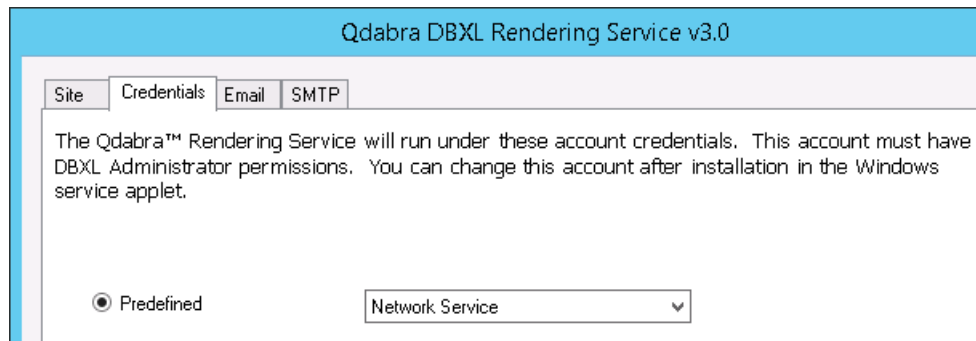
- Click **Next** to confirm the installation.



- 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.



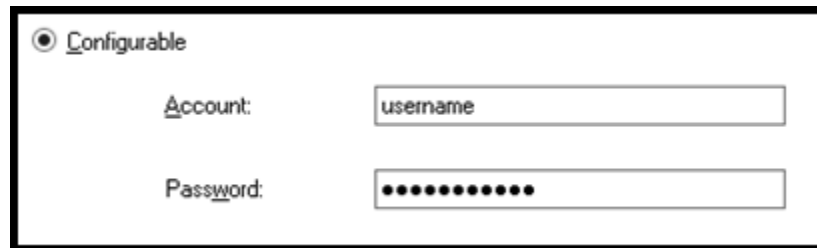
Qdabra DBXL Rendering Service v3.0

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

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

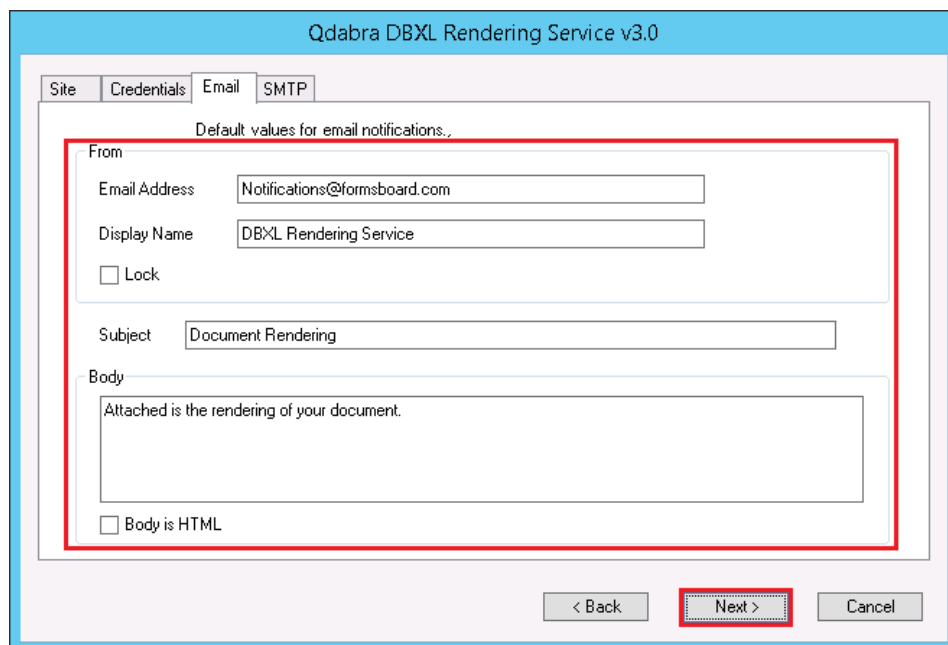


☒ Configurable

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

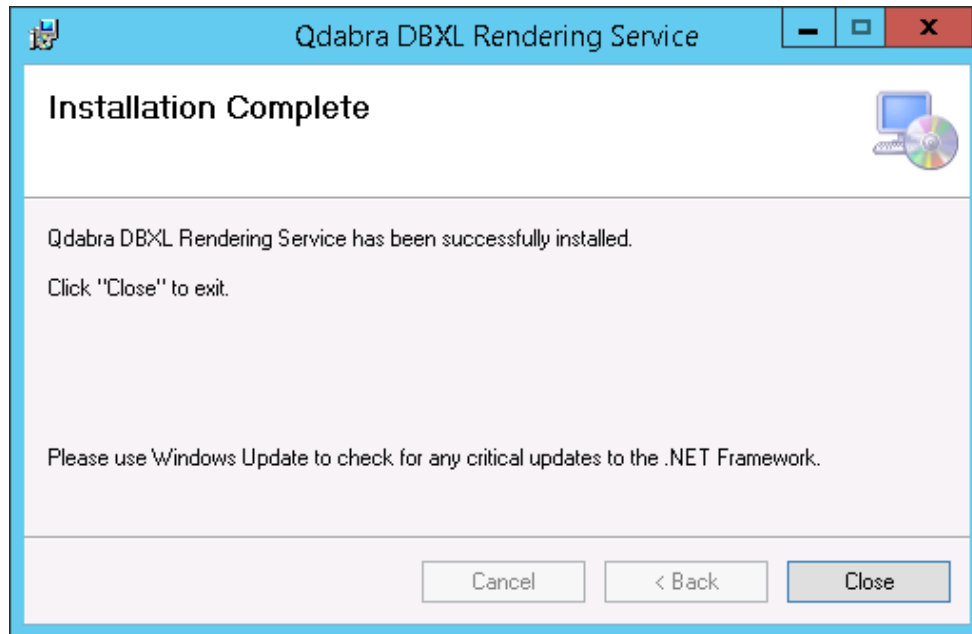
☐ Body is HTML

< Back **Next >** Cancel

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



- Configure the SMTP settings. Setting up the SMTP settings on an Azure Cloud Platform requires filling out the fields as shown below, as well as enabling SSL.
- Click **Finish** to complete the installation process.



- Close the installation wizard.

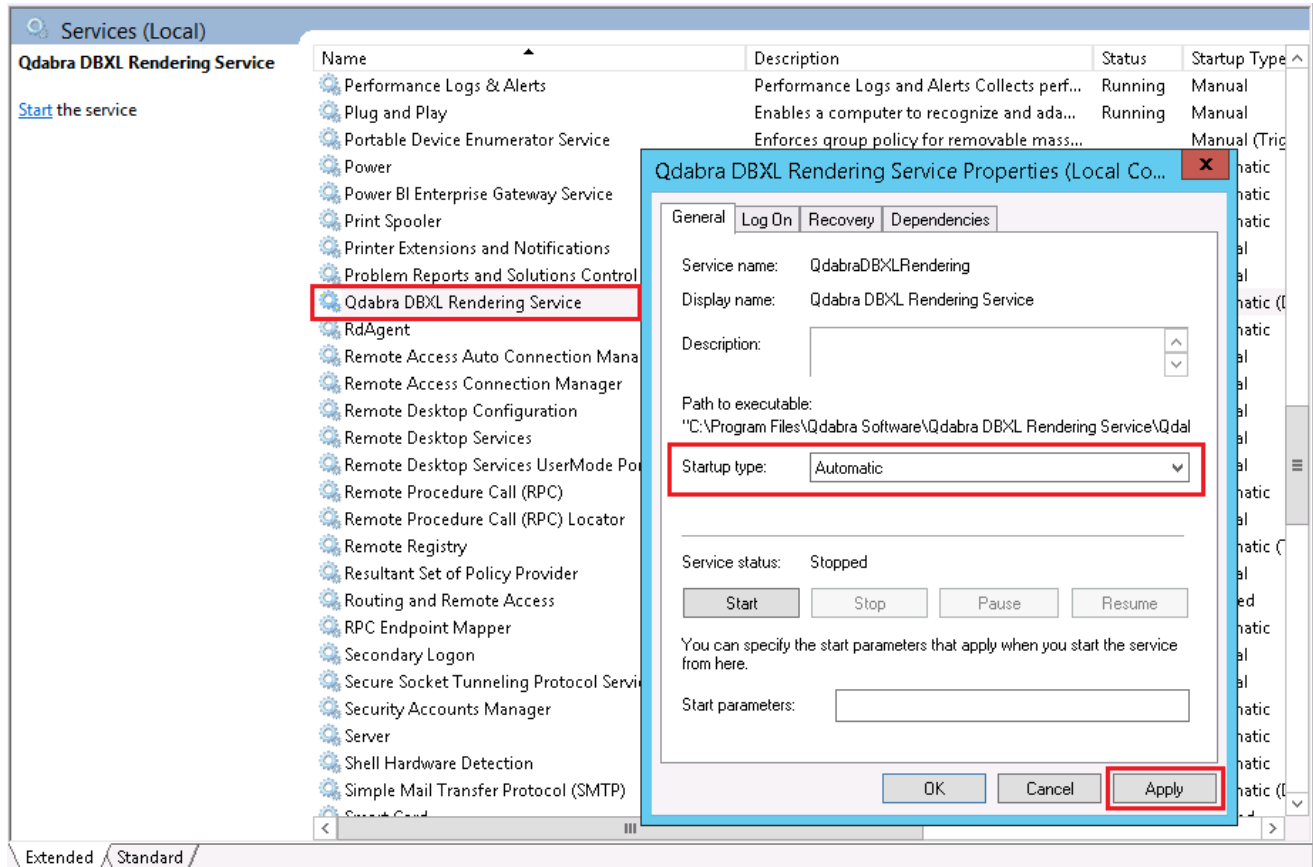
START QDABRA DBXL RENDERING SERVICE

- Open the Start Menu, type in Services in the search box, and click to run the program:



- 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 and click **OK**.

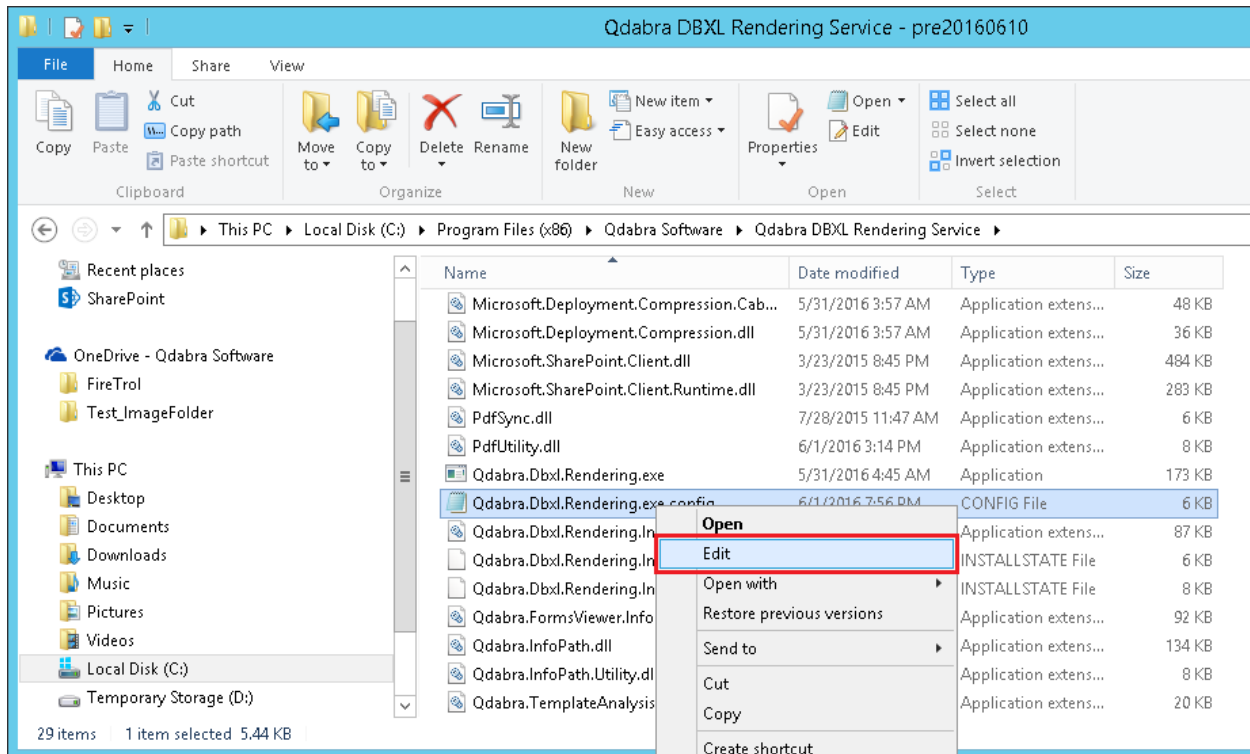
NOTE: If the Start option is grayed out and will not start, then you will need to restart the computer to start it after you set it to Automatic and clicked OK.



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="XSNSStoragePath" value="" />
  <add key="DBXL_URL" value="https://dbxl365.formsboard.com/qdabrawebservice" />
  <add key="ClientSettingsProvider.ServiceUri" value="" />

  <add key="Smtp_Servername" value="smtp.sendgrid.net" />
  <add key="Smtp_Port" value="25" />
  <add key="Smtp_UserName" value="azure_404d9f83db1b6fa77ba28f16421128c3@azure.com" />
  <add key="Smtp_SequenceNumber" value="" />
  <add key="Smtp_Password" value="TW0dm98jfd80" />
  <add key="Smtp_EnableSsl" value="true" />

  <add key="Email_Subject" value="" />
  <add key="Email_Body" value="" />
  <add key="Email_BodyIsHtml" value="false" />
  <add key="Email_FromAddress" value="Notifications@formsboard.com" />
  <add key="Email_FromDisplayName" value="DBXL Rendering Service" />
  <add key="Email_FromLocked" value="false" />

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

  <!-- 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

In this section, we will use the default QdExpenseReport-Sample form for PDF configuration.

- Click the **QdExpenseReport-Sample** doctype.

Qdabra DBXL Administration Tool **Catalog** [Refresh List](#) [New Configuration](#)

Document Type Configuration			
Group & Name	Form Version	# Docs	Edit
[-] Uncategorized forms			
ProjectCode	1.0.0.235	2	Edit
QdExpenseReport-Sample	1.0.0.4	28	Edit
QdImageFile	1.0.0.4	20	Edit
QdImageSubmitter	1.0.0.32	5	Edit

- Click the **PDF** tab to open up the **PDF Mapping configuration** page.

Qdabra DBXL Administration Tool **DocType: QdExpenseReport-Sample**

General Database Permissions Documents Statistics **PDF** XML

Mapping Basic info

Modify existing Mapping

Mapping Name	Edit	Delete
Create New Mapping		

[New](#)

- Click **New** button to create a **PDF Mapping** for the current doctype.
- Once the form opens, indicate a mapping name if desired.
- Select a View to be printed in PDF.

Qdabra DBXL Administration Tool **DocType: QdExpenseReport-Sample**

General Database Permissions Documents Statistics **PDF** XML

Mapping Basic info [Save](#) [Back to Select Mapping](#)

Mapping Source DocType:	Type:	View:	Mapping Name (recommended):
QdExpenseReport-Sample	PDF	View 1	PDF_QdExpenseReport-Sample

Rendering Process

Rendering is initiated when:	What Action take on the rendered PDF:	PDF Naming:



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

- 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 **notifications@qdabra.com**)
 - Dynamic: Uses an XPath (i.e. **/my:expenseReport/my:manager/my:managerEmailAddress**)
- Specify Recipients – Static data or Dynamic
- Click **Save** button.

Mapping Basic info			
Mapping Source DocType:	Type:	View:	Mapping Name (recommended):
QdExpenseReport-Sample	PDF	View 1	PDF_QdExpenseReport-Sample

Rendering Process		
Rendering is initiated when:	What Action take on the rendered PDF:	PDF Naming:
☒ When a new document is submitted ☒ When an existing is modified Additional Condition:	☐ Save as QdFile and send Email with link ☒ Send Email with Attachment	Naming Expression: /my:expenseReport/my:FormValues/my:FormName Archival location:
		☐ XPath Expression

Rendering Contents	
Email Subject:	Body:
☐ Static Text ☒ XPath Expression	☒ View ☐ HTML ☐ XPath Expression ☐ Plain Text
string(/my:expenseReport/my:FormValues/my:FormName)	View 1

Attachment:			
XPath of attachment:	Email:	Archive Location (optional):	File Name (for non-file attachment): ?
Add attachment			

Email Address			
	Type:	Email Address: (XPath for Dynamic):	Display Name (Optional, XPath for Dynamic):
From Address	static	notifications@qdabra.com	
To Address	dynamic	/my:expenseReport/my:manager/my:manage	
CC Address	static	Add CC Email Address	
BCC Address	static	Add BCC Email Address	

This configuration should be enough to help you get started with rendering a PDF and sending the PDF file via email.

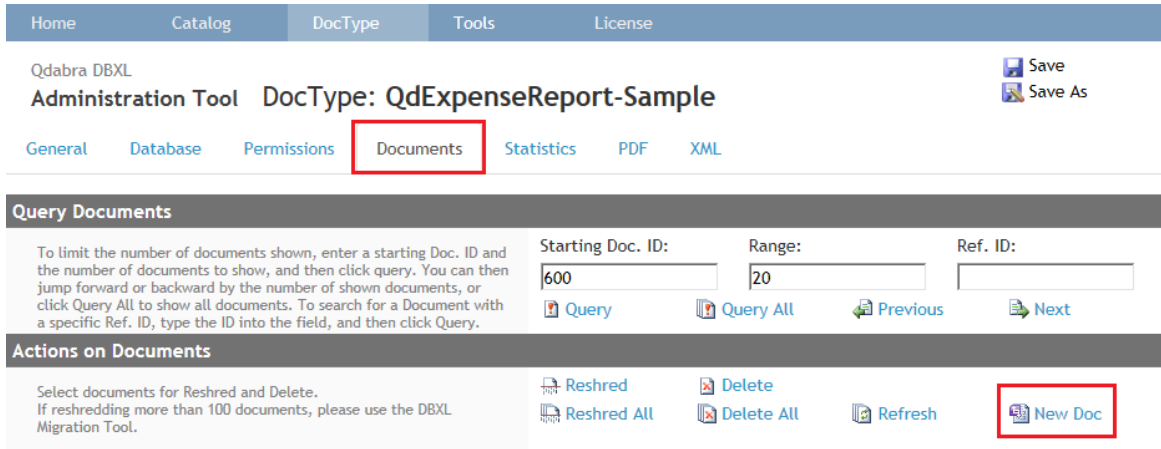
Using an **Archival Location** saves the PDF file to a local server folder, if specified. This is a very nice feature and works wonderfully with [OneDrive for synching PDF files to SharePoint 2013 and Office 365](#).

Note: Specifying a Mapping name helps identifying the mappings easier – greatly helps if you are dealing with multiple PDF mappings.



Feel free to try and generate a PDF by submitting a test form.

- Go to the **Documents** tab and click **New Doc**.



Home Catalog DocType Tools License

Qdabra DBXL Administration Tool DocType: QdExpenseReport-Sample

General Database Permissions **Documents** Statistics PDF XML

Query Documents

To limit the number of documents shown, enter a starting Doc. ID and the number of documents to show, and then click query. You can then jump forward or backward by the number of shown documents, or click Query All to show all documents. To search for a Document with a specific Ref. ID, type the ID into the field, and then click Query.

Starting Doc. ID: 600 Range: 20 Ref. ID:

Query Query All Previous Next

Actions on Documents

Select documents for Reshred and Delete. If reshredding more than 100 documents, please use the DBXL Migration Tool.

Reshred Delete Reshred All Delete All Refresh **New Doc**

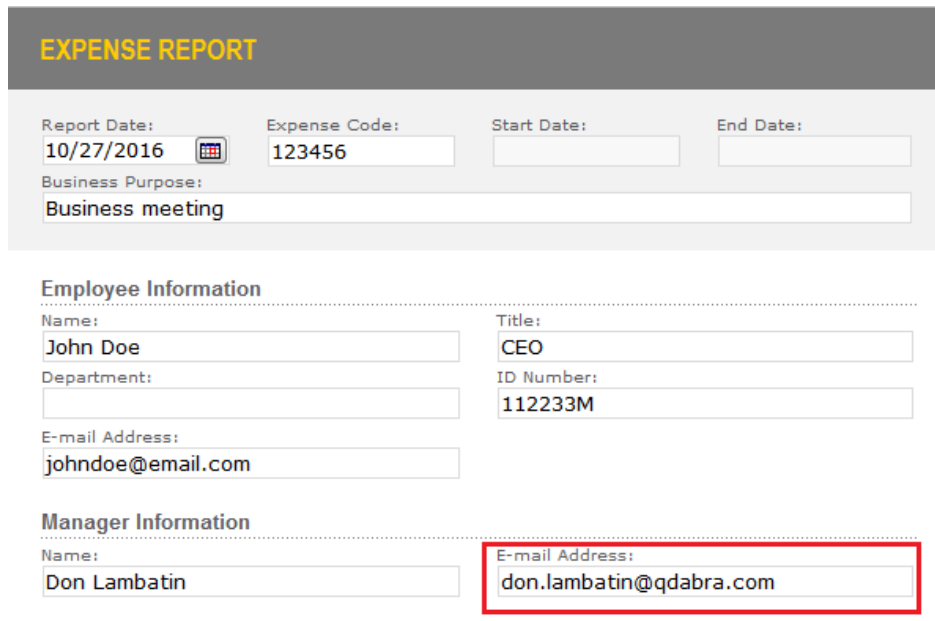
- If prompted, click Open to open up QdExpenseReport fom.



Do you want to open or save **template.xsn** (11.9 KB) from **dbxl365.formsboard.com?**

Open Save Cancel x

- Enter dummy data for testing. Note that the xPath for email recipient specified for this configuration is for the **managerEmailAddress** field. Therefore the email specified in the manager email address text box will receive the PDF file.



EXPENSE REPORT

Report Date: 10/27/2016 Expense Code: 123456 Start Date: End Date:

Business Purpose: Business meeting

Employee Information

Name: John Doe Title: CEO

Department: ID Number: 112233M

E-mail Address: johndoe@email.com

Manager Information

Name: Don Lambatin E-mail Address: don.lambatin@qdabra.com

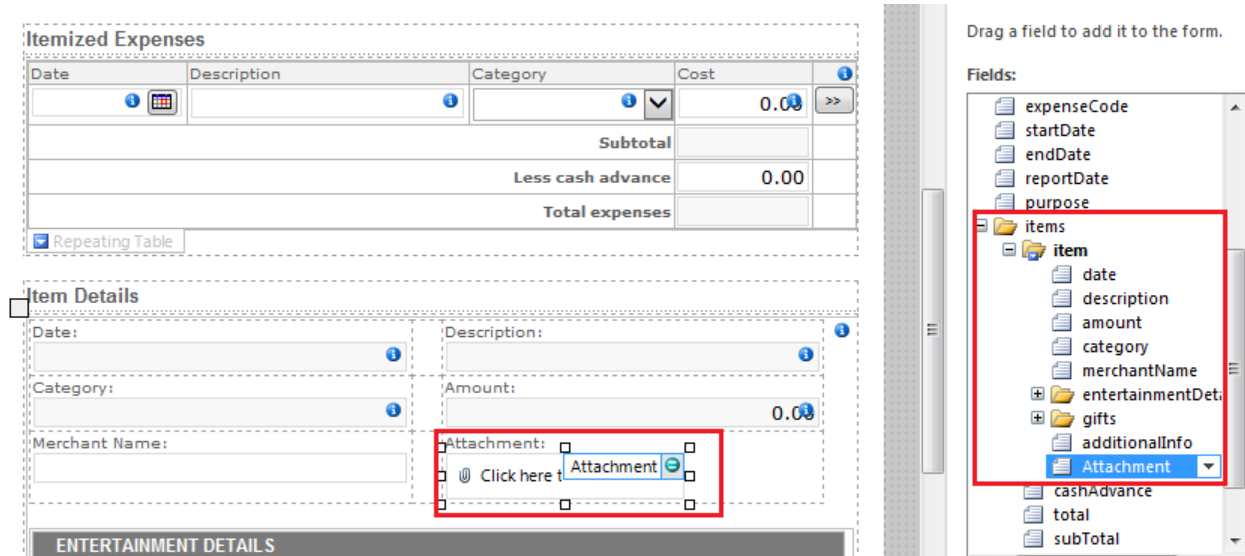
- Click the Submit button – An email with a PDF attachment should be received shortly.



WORKING WITH ATTACHMENTS

Qdabra's DBXL Rendering Service supports InfoPath forms with attachments. These attachments can either be sent via email along with the rendered PDF, or saved to a local server folder if an Archival Location has been specified.

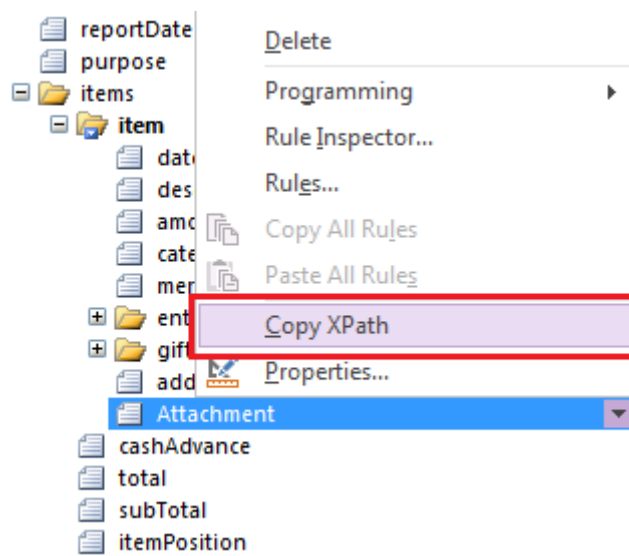
What's great about this feature is that it can support repeating data. In this schema below you will notice that the attachment field is located within a repeating group:



The screenshot displays the Qdabra DBXL form editor interface. On the left, the 'Itemized Expenses' section contains a table with columns: Date, Description, Category, and Cost. Below this is a 'Repeating Table' button. The 'Item Details' section contains fields for Date, Description, Category, Amount, and Merchant Name. The 'Attachment' field is highlighted with a red box. On the right, the 'Fields' pane shows a tree structure of fields. The 'Attachment' field is selected under the 'items' group.

This is still the same **QdExpenseReport Sample** form, modified to accommodate file attachments.

We can easily map this **attachment field** by declaring the **xPath** in the **PDF mapping configuration page**. To grab the field's XPath, right click on the field and click **Copy XPath**.



Back in the **PDF mapping configuration page**, paste in the **xPath** of the attachment field and tick checkbox to include the attachment/s in the email.

Home	Catalog	DocType	Tools	License
Qdabra DBXL				
Administration Tool DocType: QdExpenseReport-Sample				
General	Database	Permissions	Documents	Statistics PDF XML
Mapping Basic info Save Save As Back to Select Mapping				
Mapping Source DocType:		Type:	View:	Mapping Name (recommended):
QdExpenseReport-Sample		PDF	View 1	PDF_QdExpenseReport-Sample
Rendering Process				
Rendering is initiated when:		What Action take on the rendered PDF:		PDF Naming:
☒ When a new document is submitted ☒ When an existing is modified Additional Condition:		☐ Save as QdFile and send Email with link ☒ Send Email with Attachment		Naming Expression: /my:expenseReport/my:FormValues/my:FormName Archival location: ☒ XPath Expression
Rendering Contents				
Email Subject:		Body:		
☐ Static Text ☒ XPath Expression		☒ View ☐ HTML ☐ XPath Expression ☐ Plain Text		
string(/my:expenseReport/my:FormValues/my:FormName)		View 1		
Attachment:				
XPath of attachment:		Email:	Archive Location (optional):	File Name (for non-file attachment): ?
/my:expenseReport/my:items/my:item/my:AI		☒		
Add attachment				
Email Address				
Type:	Email Address: (Xpath for Dynamic):	Display Name (Optional, Xpath for Dynamic):		
From Address	static notifications@qdabra.com			
To Address	dynamic /my:expenseReport/my:manager/my:manage			
CC Address	static Add CC Email Address			
BCC Address	static Add BCC Email Address			

When done, click the **Save** button to save the PDF mapping configuration.

Your form should now be able to send converted PDF forms along with their attachments.

SAVE PDF AND ATTACHMENTS TO LOCAL FOLDER ON YOUR SERVER

You might be wondering why would you want to do this? Well, you can use **OneDrive for Business** as leverage for synching and archiving your document files.

OneDrive for Business is an integral part of Office 365 or SharePoint Server, and provides place in the cloud where you can store, share, and sync your work files. You can update and share your files from any device with OneDrive for Business. You can even work on Office documents with others at the same time.



There is a documentation that demonstrates how to sync PDF Files using DBXL PDF Rendering Service along with OneDrive here: [PDF sync using OneDrive](#)

In this section, we will swiftly discuss how to archive your PDF Rendering attachments.

Going back to the PDF mapping configuration page, you will notice an optional Archive Location and a File Name field.

Rendering Contents

Email Subject: _____ Body: _____

☐ Static Text
 ☒ XPath Expression
 ☐ View
 ☐ HTML
 ☐ XPath Expression
 ☐ Plain Text

concat('Expense Report - ', /my:expenseReport/my:emplo) View 1

Attachment:

XPath of attachment:	Email:	Archive Location (optional):	File Name (for non-file attachment): ?
/my:expenseReport/my:items/my:item/my:A	☒	'C:\PDF Uploads'	'FileAttachment'

Note that using single quotes will produce a static value (i.e 'C:\PDF Uploads') – for both fields File Name and Archive Location. Otherwise, the specified value will be treated as an XPath.

Attachment:

XPath of attachment:	Email:	Archive Location (optional):	File Name (for non-file attachment): ?
/my:expenseReport/my:items/my:item/my:A	☒	/my:expenseReport/my:FolderLo	/my:expenseReport/my:expenseCode

[Add attachment](#)

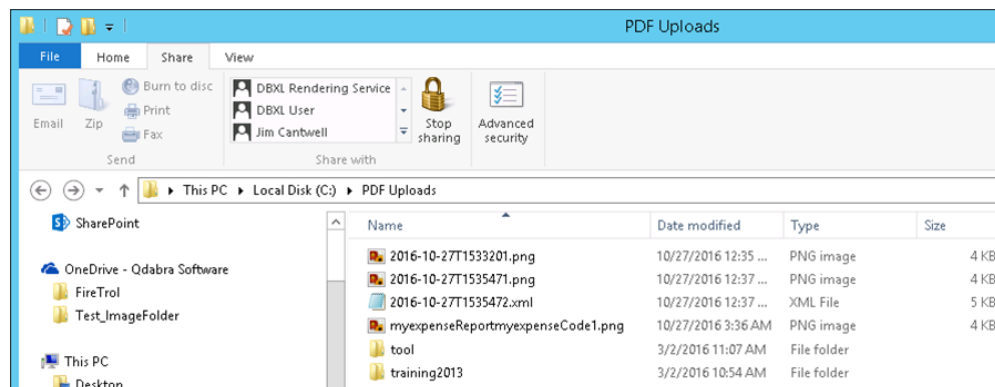
The File Name on the other hand appends an incrementing numeric value (FileAttachment1, FileAttachment2, ... FileAttachmentN)

To remove the affixed # for the attachment File Name, append a period to the entered data.

'FileName.' for static data, and a concatenated expression for dynamic data:

concat(/my:expenseReport/my:expenseCode, '.')

This configuration should now allow attachments to be saved in a local folder on your server.



ADDITIONAL STEPS FOR INSTALLING ON AZURE:

1. Create a pdfsvc account
2. Change account used by PDF service
3. Add pdfsvc to DbxAdmins
4. Grant full permissions to pdfsvc account on "C:\program files\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

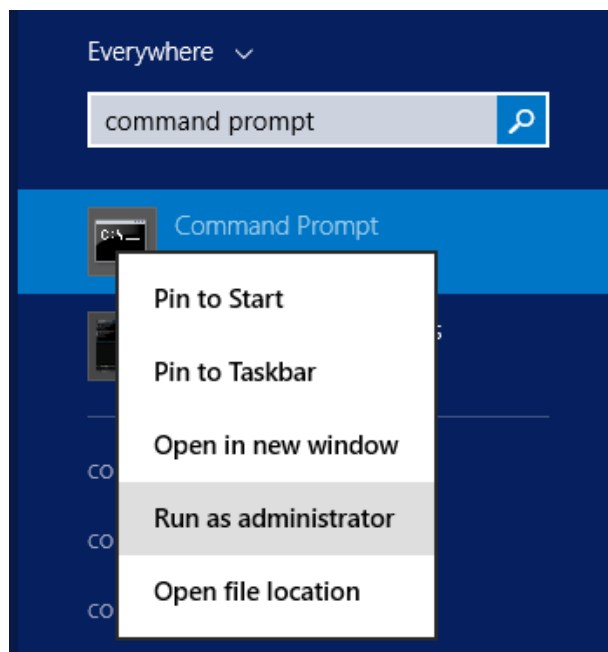
ADDITIONAL STEPS TO TROUBLESHOOT ERRORS:

"Error 1001" During DBXL Rendering Install:

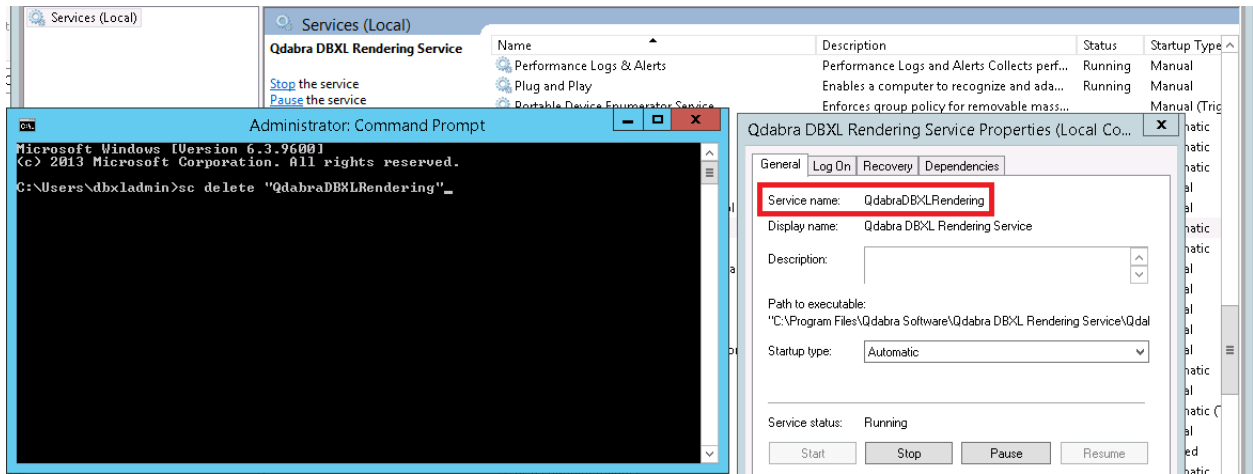
While installing DBXL Rendering Service if you get the "Error 1001", please perform the following additional steps:

(This error usually occurs if there was a previous installation which failed to uninstall properly)

- Go to the "START" menu, search for *Command Prompt*. Right-click on *Command Prompt* and select *"Run as administrator"*.

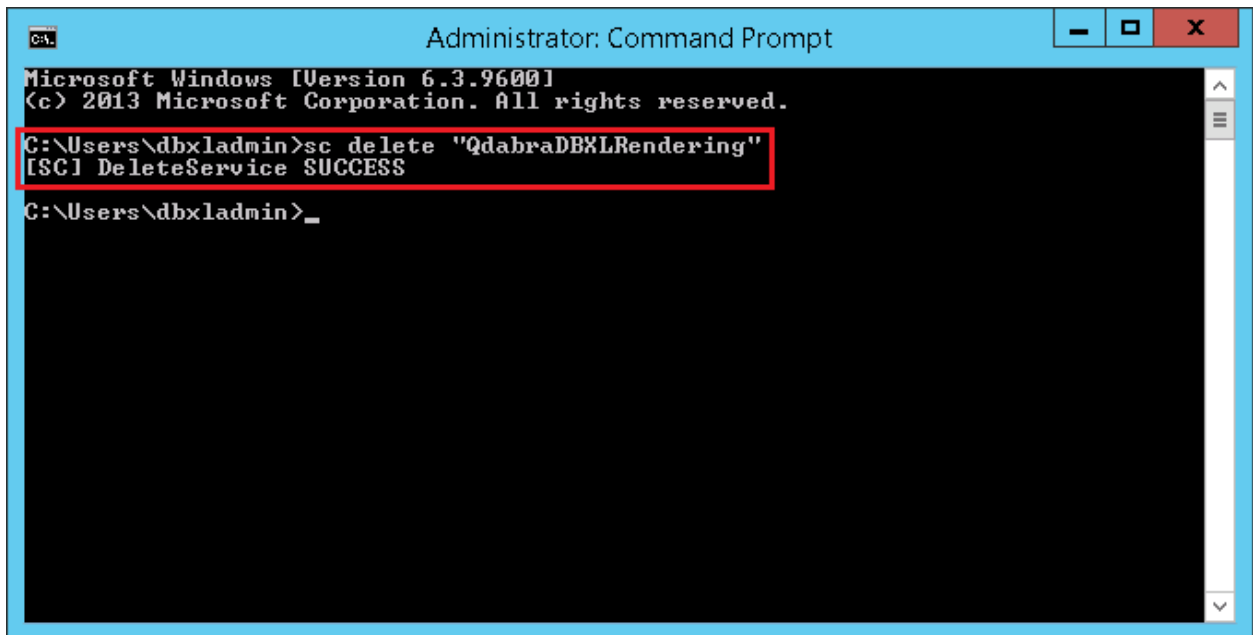


- On Command Prompt window, type the following command: **sc delete "QdabraDBXLRendering"** and press ENTER.



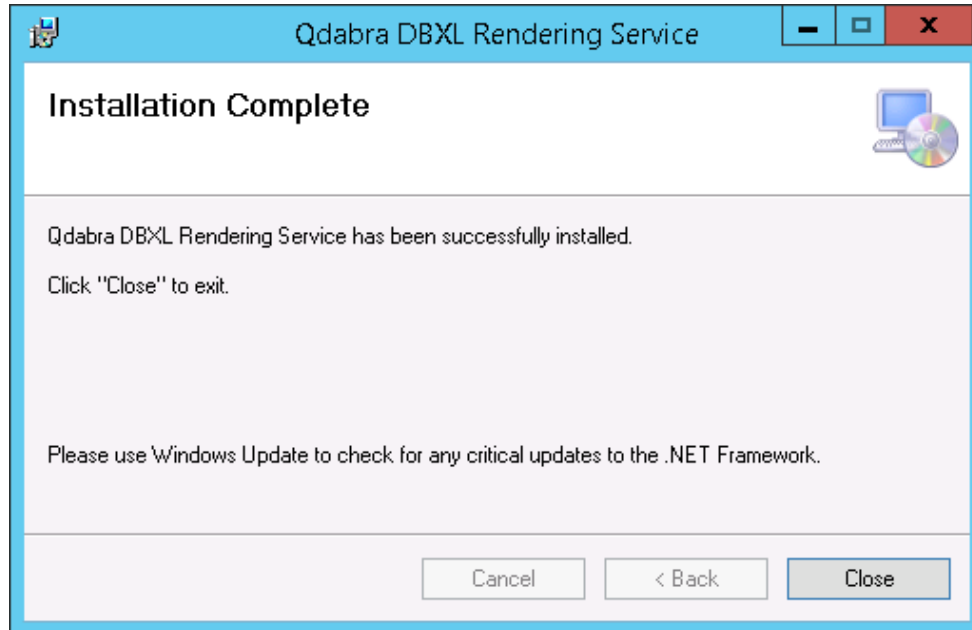
To make sure you are using the correct name of the service you are attempting to delete, open up Services.msc and check the **Service Name** at the property settings of Qdabra DBXL Rendering Service.

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



You should now be able to install the DBXL Rendering Service.

- 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:



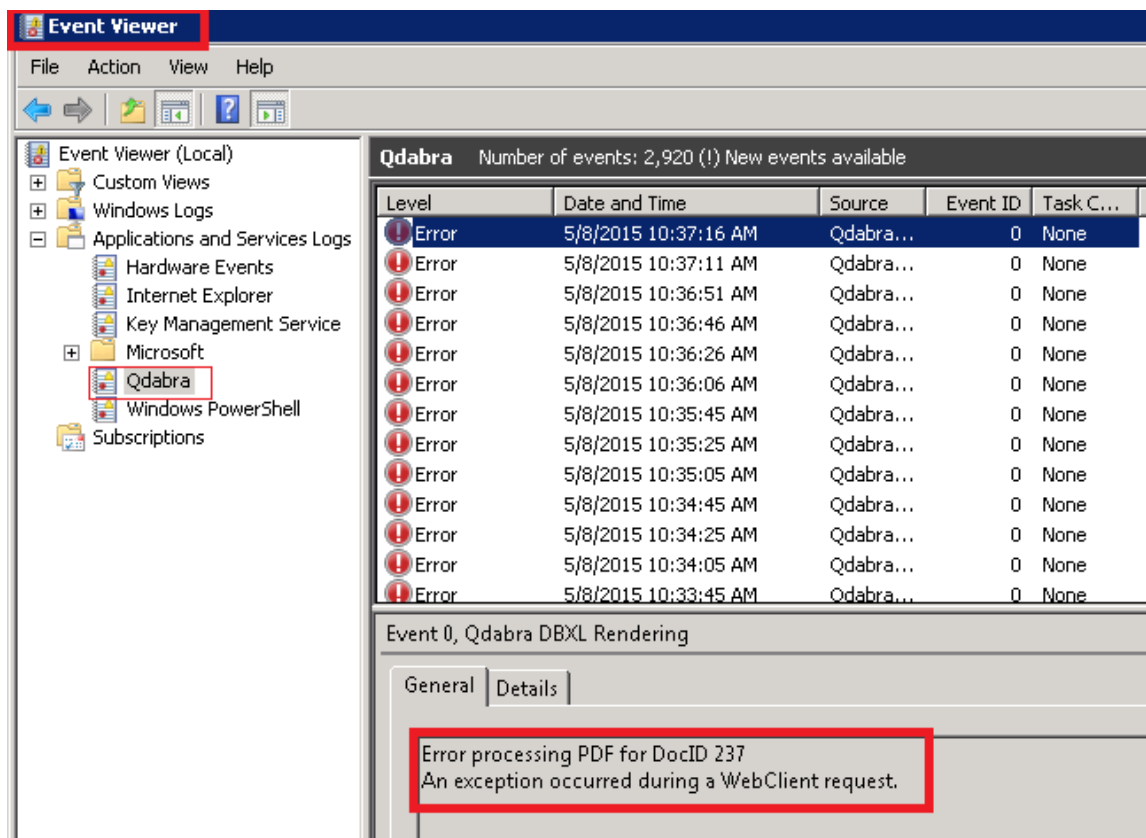
- Click on **Close**.



"Error Processing PDF for DocID":

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

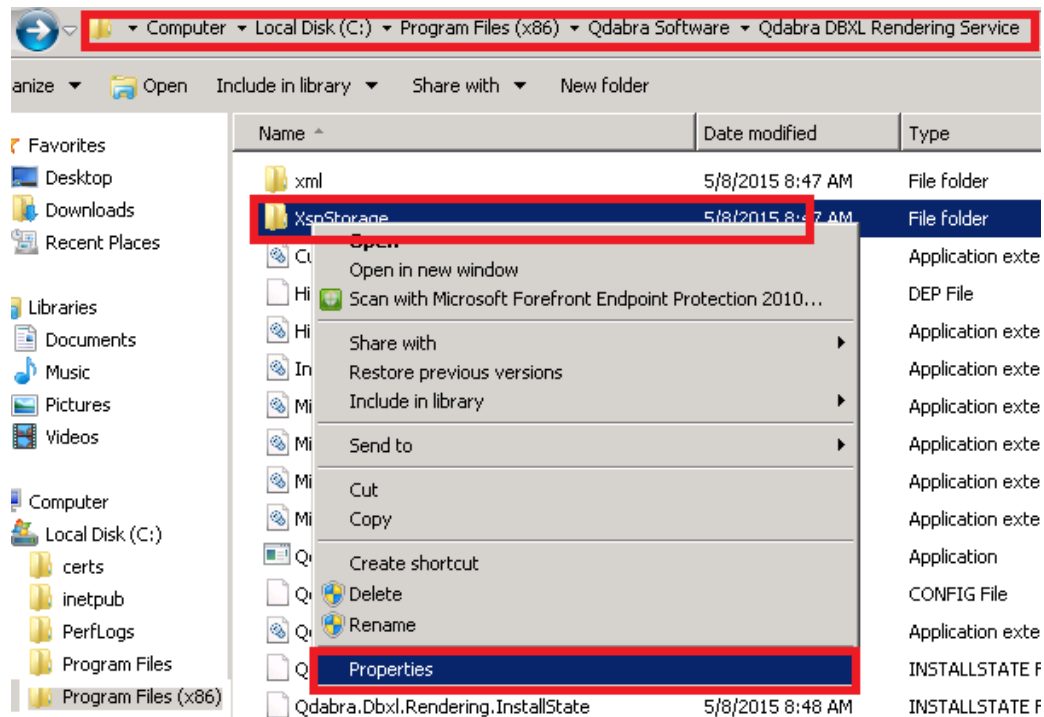
- Open the Sample Expense Report form, enter the values including email address of the recipients (you can give your Outlook address to verify it) and click on **Submit**.
- To verify that PDF Rendering is working correctly, open the **Event Receiver** on the machine where you installed DBXL Rendering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



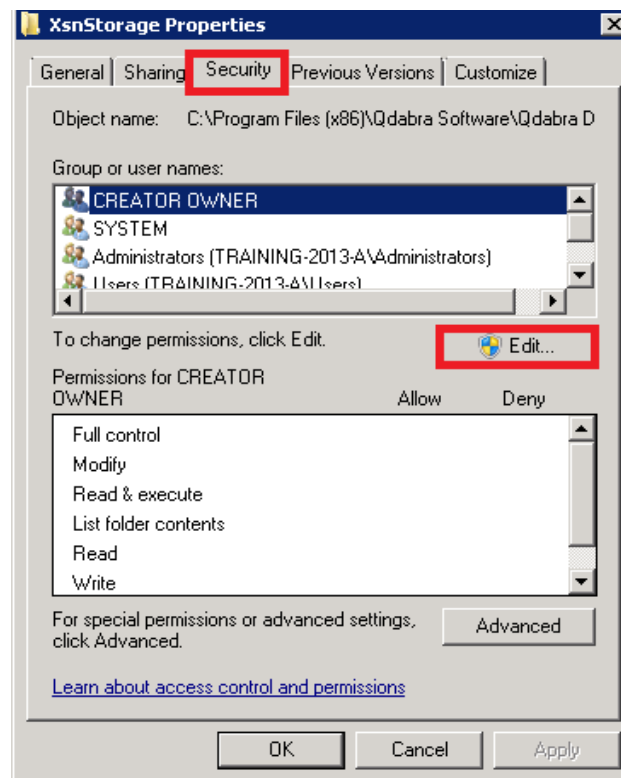
- Navigate to the Parent folder from Windows Explorer, i.e. **C:/Program Files(x86)/Qdabra Software/Qdabra DBXL Rendering Service/**.



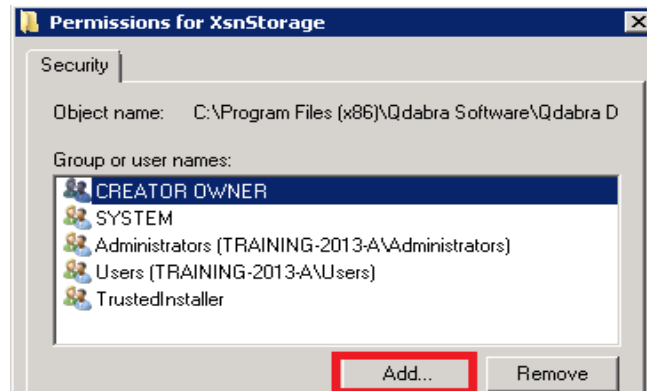
- Right-click on the XsnStorage folder and select **Properties**.



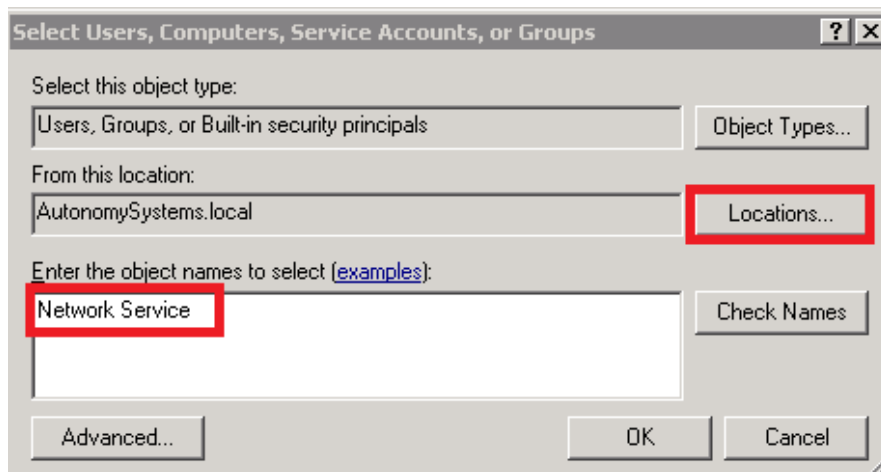
- On the “XsnStorage Properties” window, click on **Security** tab and click **Edit**.



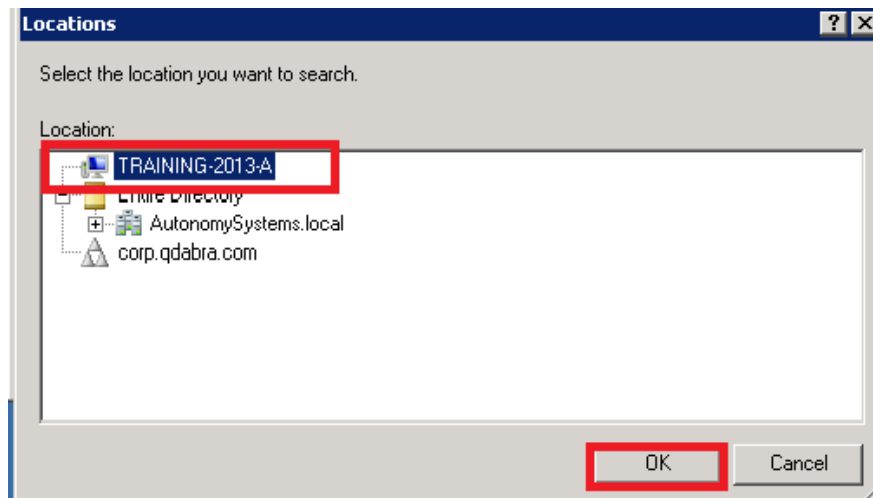
- On the next window click on **“Add”**.



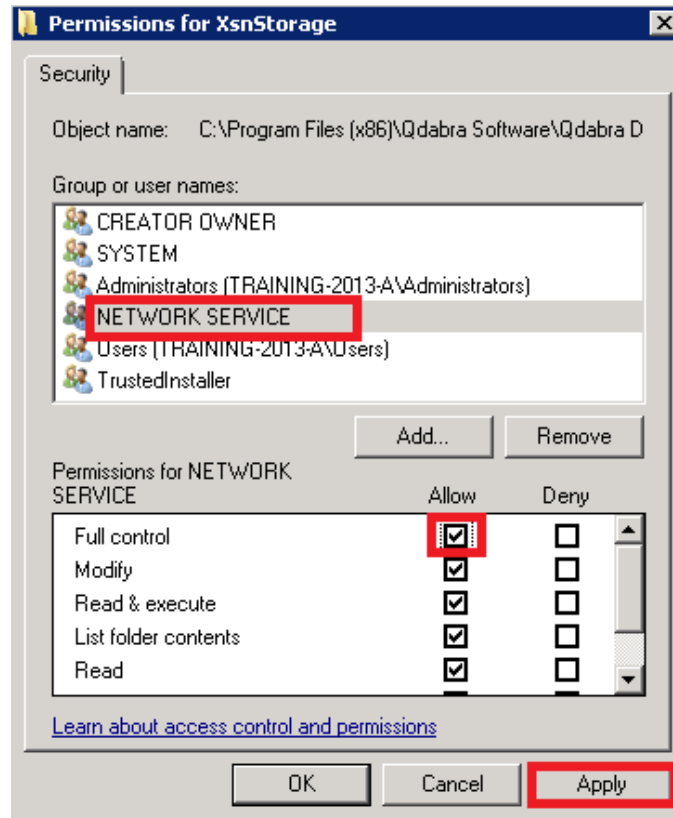
- On the next window, give **“Network Service”** as the object name. Click on **Locations**.



- 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: 5/8/2015 Expense Code: Start Date: 5/8/2015 End Date: 5/8/2015
Business Purpose:

Employee Information

Name: Prachi Singh Title:
Department: ID Number:
E-mail Address: prachi.singh@qdabra.com

Manager Information

Name: Patrick Halstead E-mail Address: patrick.halstead@qdabra.com

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!
Qdabra Rocks! <end> 11:22 AM

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

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

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

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

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

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

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

Message 2015-05-08.pdf (161 KB)

EXPENSE REPORT

Report Date: 5/8/2015 Expense Code: Start Date: 5/8/2015 End Date: 5/8/2015
Business Purpose:

Employee Information

Name: Prachi Singh Title:
Department: ID Number:
E-mail Address: prachi.singh@qdabra.com

Manager Information

Name: Patrick Halstead E-mail Address: patrick.halstead@qdabra.com

Itemized Expenses

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Item Details



CONTACT INFORMATION

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