

# DBXL v3.3 INSTALLATION GUIDE

Thank you for downloading DBXL v3.3.

This document will guide you through the installation of DBXL v3.3. Before installing, please check this [document](#) to review the scenarios that applies to your environment.

If you are upgrading from a previous version of DBXL, please contact [Qdabra support](#).

## CONTENTS

SERVER REQUIREMENTS .....	1
CLIENT REQUIREMENTS .....	4
INSTALLATION STEP BY STEP .....	5
POST INSTALLATION.....	11
SUPPORT .....	14

## SERVER REQUIREMENTS

The installation package requires .NET 4.5.1.

To verify you have the correct .NET library installed click the following link and walk through the steps: [https://msdn.microsoft.com/en-us/library/hh925568\(v=vs.110\).aspx#net\\_b](https://msdn.microsoft.com/en-us/library/hh925568(v=vs.110).aspx#net_b)

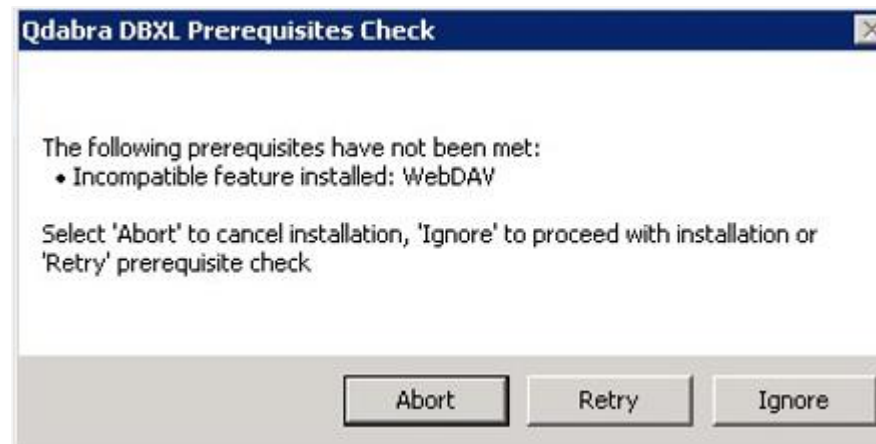
The server where DBXL will be installed needs to meet the following requirements:

- **Domain**
  - DBXL should only be installed on machines that are part of a domain. This can be verified in My Computer > Properties > Computer Name.
  - If you choose to install DBXL on a machine that is not joined to a domain, some aspects of DBXL that deal with authentication (such as the Active Directory web service) will not work.
- **SQL:**
  - DBXL is compatible with SQL 2005 (including Express edition), SQL 2008 (including Express edition) and 2012. It has not been tested with MSDE or SQL Compact, and it is not compatible with the Windows Internal Database.
  - Note that for all of DBXL's search methods to work, Full Text Search should be installed. If Full Text Search is not

- installed, DBXL will install (and log a warning in the eventvwr).
- Qdabra recommends that the user installing DBXL be granted sysadmin permission on SQL. However, there are two installation scenarios that should work without users needing the sysadmin role:
    - SQL DBA pre-creates the databases and grants that user (who is installing DBXL) db\_owner.
    - User has dbcreator permission.
  - **SharePoint**
    - In the past, Qdabra Software recommended installing DBXL on the SharePoint – 80 site. This is no longer the default scenario.
    - DBXL should be installed on a separate server. However, if a separate server is not available, DBXL can be installed on a separate site (on the SharePoint server).
    - DBXL has been tested with SharePoint 2010 and 2013. It is compatible with SharePoint 2007 and 2016
  - **IIS**
    - DBXL requires IIS 5.1 or newer, configured to work with .NET Framework 4.5.1
    - For IIS 7.0, all IIS 6.0 compatibility features must be installed.
  - The DBXL installer adds the DBXL App pool account to WSS\_WPG (when DBXL is installed on a SharePoint site) or IIS\_WPG (when DBXL is installed on a non-SharePoint site).
  - When setting up the server, under Windows components application server, there is an option to allow ASP.Net applications. This needs to be installed in order for the software to install and run correctly.
  - The DBXL installer grants db\_datareader and db\_datawriter SQL permissions to the application pool identity.
  - Anonymous Authentication must be disabled on the site where DBXL is going to be installed; otherwise, the installer might fail. Windows Authentication must be enabled on the site; otherwise the installer will stop with the following message. Once Windows Authentication is enabled, you may click Retry on the dialog box.



- DBXL has not been tested with Windows Server 2003.
- The DBXL Installation will fail on sites that have the WebDAV Publishing IIS role installed. If WebDav publishing shows as *Installed*, the DBXL installer will return a message such as the one shown in the screenshot below.



Note that uninstalling WebDAV may require a server restart. If one is needed, you will need to click Abort in the dialog shown above, then restart the DBXL installer after the server restarts.

Here is a screenshot of the IIS roles installed on one of Qdabra's internal servers, as an example:

**Web Server (IIS)**  
Provides a reliable, manageable, and scalable Web application infrastr

Role Services: 41 installed

Role Service	Status
Web Server	Installed
Common HTTP Features	Installed
Static Content	Installed
Default Document	Installed
Directory Browsing	Installed
HTTP Errors	Installed
HTTP Redirection	Installed
WebDAV Publishing	Not installed
Application Development	Installed
ASP.NET	Installed
.NET Extensibility	Installed
ASP	Installed
CGI	Installed
ISAPI Extensions	Installed
ISAPI Filters	Installed
Server Side Includes	Installed
Health and Diagnostics	Installed
HTTP Logging	Installed
Logging Tools	Installed
Request Monitor	Installed
Tracing	Installed
Custom Logging	Not installed
ODBC Logging	Not installed
Security	Installed
Basic Authentication	Installed
Windows Authentication	Installed
Digest Authentication	Installed
Client Certificate Mapping Authentication	Installed
IIS Client Certificate Mapping Authentication	Installed
URL Authorization	Installed
Request Filtering	Installed
IP and Domain Restrictions	Installed
Performance	Installed
Static Content: Compression	Installed
Dynamic Content: Compression	Installed
Management Tools	Installed
IIS Management Console	Installed
IIS Management Scripts and Tools	Installed
Management Service	Installed
IIS 6 Management Compatibility	Installed
IIS 6 Metabase Compatibility	Installed
IIS 6 WMI Compatibility	Installed
IIS 6 Scripting Tools	Installed
IIS 6 Management Console	Installed
FTP Server	Not installed
FTP Service	Not installed
FTP Extensibility	Not installed
IIS Hostable Web Core	Not installed

## CLIENT REQUIREMENTS

The client machine is the computer that will access the DBXL Administration Page and Web services.

- **Permissions:** Ability to authenticate with the server where DBXL will be installed.
- **Browser:** Internet Explorer 11 or higher. Chrome will also work.

## WINDOWS OR SQL AUTHENTICATION?

DBXL may use either Windows Authentication or SQL Server Authentication to connect to the database specified by the installer. The connection string that DBXL uses to connect to the SQL Server is stored in the web.config file of the web service.

When using Windows Authentication, this connection string is left unencrypted since it does not contain password information. The DBXL service account will be added to the db\_datareader and db\_datawriter roles for the DBXL databases during installation. The user account used to run the DBXL installation must be a sysadmin of the SQL Server instance.

If using a local account (e.g. Network Service) and a remote SQL instance, the machine account (e.g. <Domain>\<Machine>\$) is added to the db\_datareader and db\_datawriter role.

For SQL Server Authentication the connection string is encrypted to prevent unauthorized users from obtaining the password information. In addition, when using SQL Authentication, the SQL account specified must have database creation permission during the installation process. Once installed, the only permissions required are membership in db\_datareader and db\_datawriter roles.

	SQL Authentication	Windows Authentication
Local SQL Server	<ul style="list-style-type: none"> <li>• Connection string is encrypted</li> <li>• SQL and Web Service users are separate</li> </ul>	<ul style="list-style-type: none"> <li>• Connection string is not encrypted</li> <li>• SQL and Web Service users are the same</li> </ul>
Remote SQL Server	<ul style="list-style-type: none"> <li>• Same as Local SQL Server</li> <li>• Connection string for QueryDB connections must be declared (unencrypted) in web.config.</li> </ul>	<ul style="list-style-type: none"> <li>• Connection string is not encrypted</li> <li>• User &lt;Domain&gt;\&lt;Machine&gt;\$ is added to the remote SQL Server as a db_owner.</li> </ul>

Independent of the authentication method chosen, the user specified for connecting to the SQL Server is added to the QdabraDBXL and QdabraUtility databases in the db\_datareader and db\_datawriter roles.

## INSTALLATION STEP BY STEP

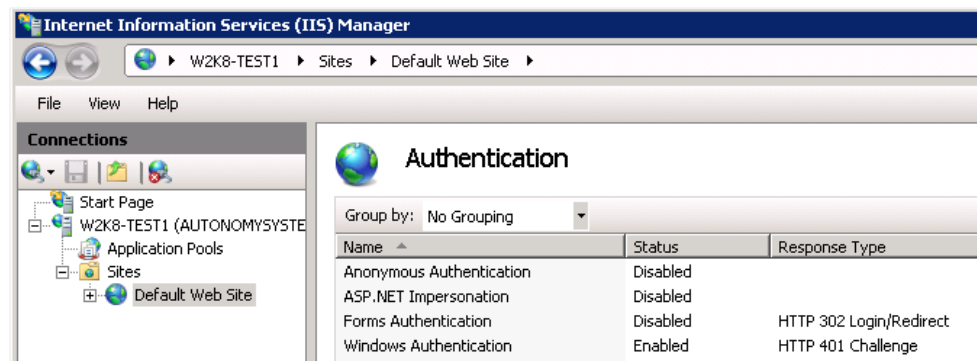
This section contains step-by-step instructions for the installation of DBXL.

### CREATE THE SITE

This section is only required if following the Event Receiver scenario.

On the server where DBXL will be installed, a new site will be needed (if one does not exist already). Qdabra Software recommends installing DBXL on a standalone IIS web site that does not host SharePoint.

1. Create a new IIS site that uses Windows Authentication. Anonymous Authentication must be disabled.



2. Check permissions on the site's new folder and compare these to the permissions on the wwwroot folder. Add any missing permissions.
3. Check the firewall to ensure outside users can communicate with the site.

Please make sure that your server has .NET Framework 4.5.1 installed.

## START THE INSTALLER

4. Right click on setup.exe and select **Run as Administrator**.



5. Click **Next** in the **Welcome** screen.
6. After reviewing the **End User License Agreement**, select **I Agree** and click **Next**.

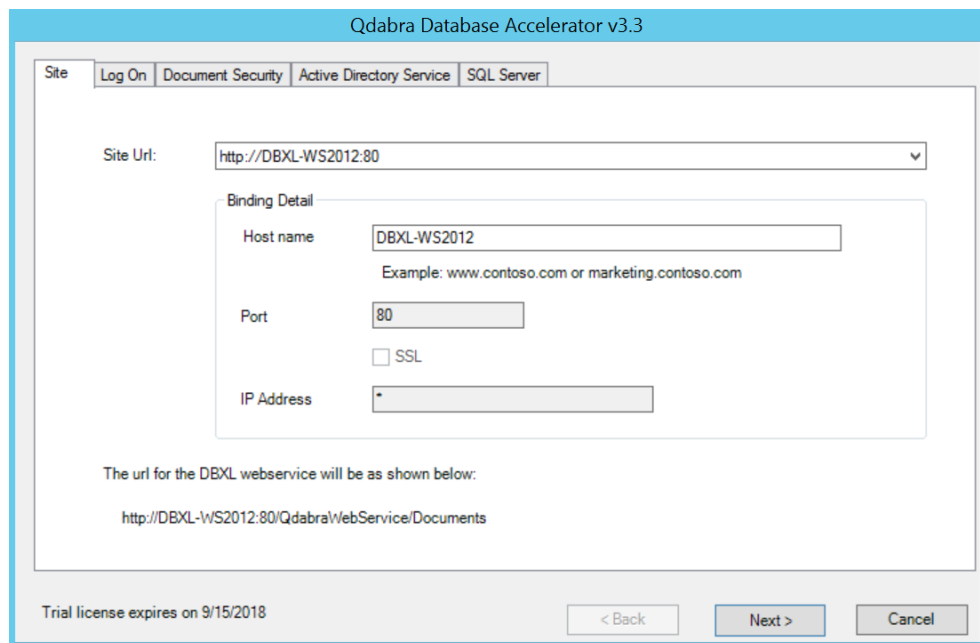
## INSTALLATION ADDRESS

7. 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.
8. The **Virtual Directory** is set to QdabraWebService by default, but this can be changed if desired.
9. 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.

## SITE

The Site tab allows you to select the site URL.



10. 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.
  - 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](mailto:support@qdabra.com).

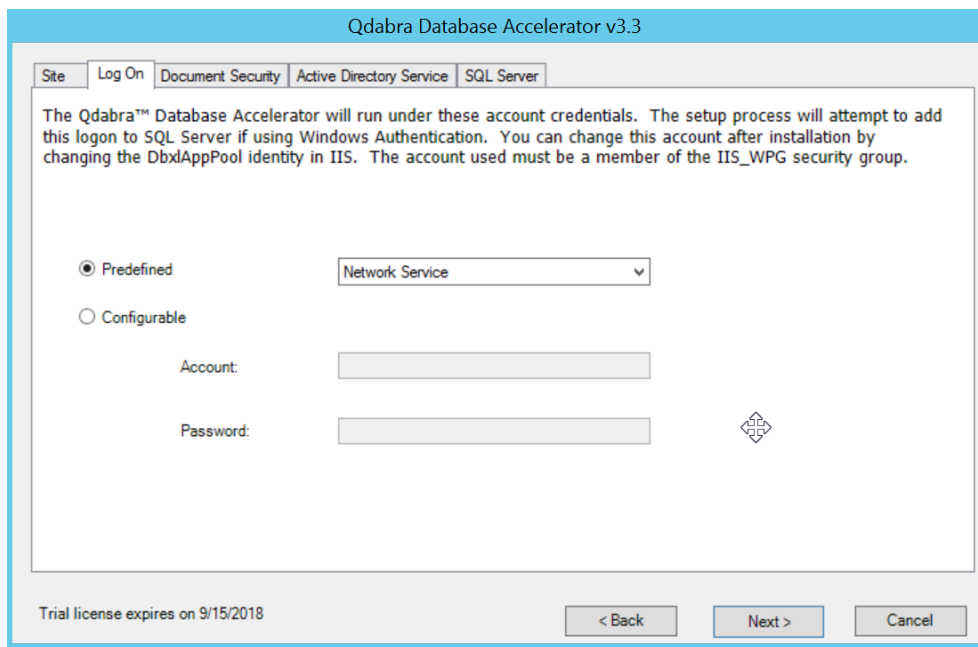
11. Click **Next** to proceed to the following tab.

## LOGON TAB

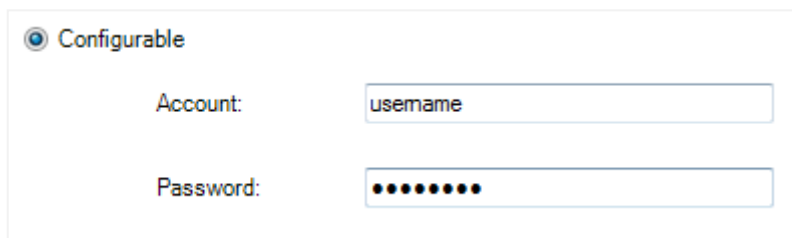
The **Log On** tab allows you to indicate the account which DBXL will run as.

12. Select between **Predefined** and **Configurable** account credentials.

- If you select **Predefined**, you will not need to provide credentials.



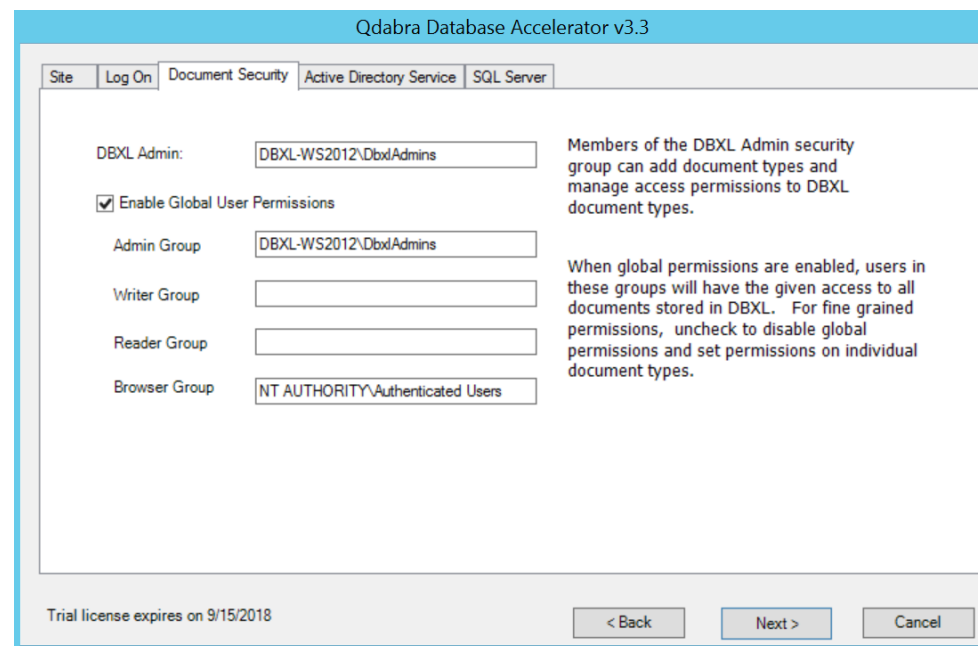
- If you select **Configurable**, you must provide an **Account** and **Password**.



13. 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.

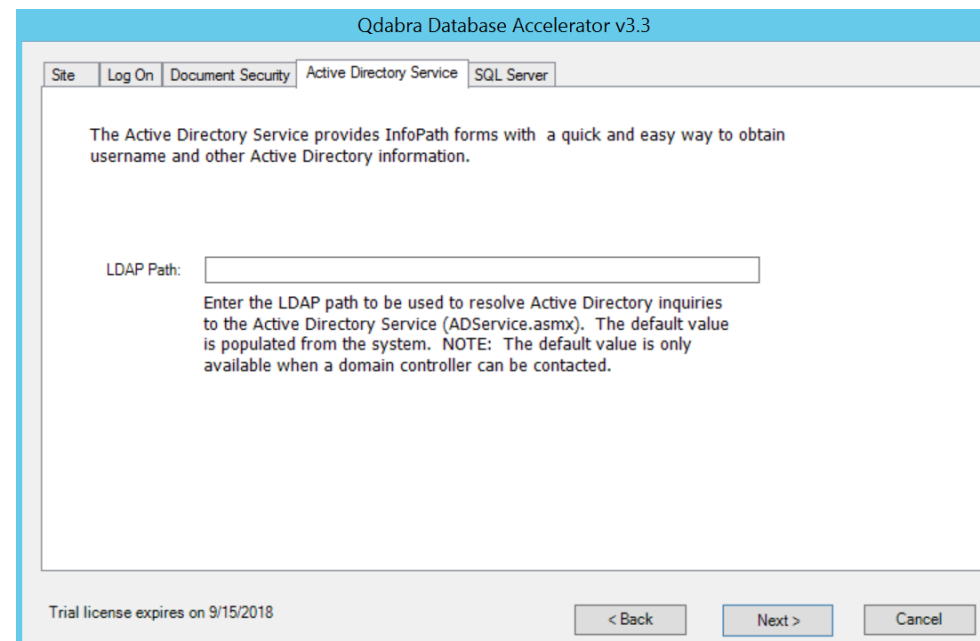
This screen has other options, such as the **Enable Global User Permissions** checkbox. If you uncheck **Enable Global User Permissions** checkbox, you will have to set permissions on every individual document type, since the Global Permissions will not be enforced. Disabling global permissions does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

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

## ACTIVE DIRECTORY SERVICE TAB

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.

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



16. Click on **Next** to go to the following tab.

## SQL SERVER TAB

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

17. 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.

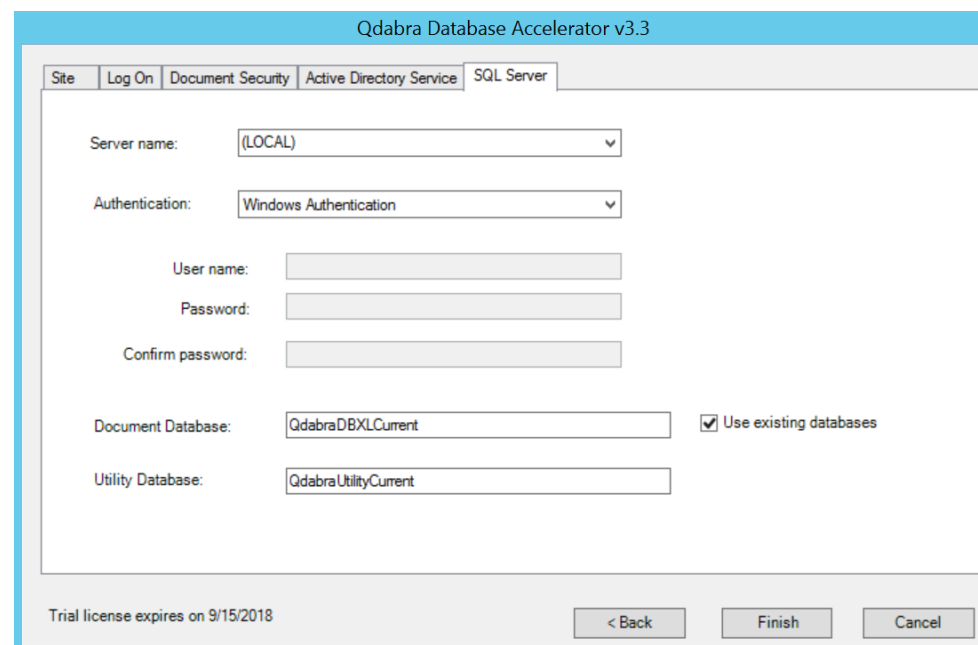
18. Select the **Authentication** type used to access the SQL server from the dropdown

- 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.

19. 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.



## FINISH THE INSTALLER

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

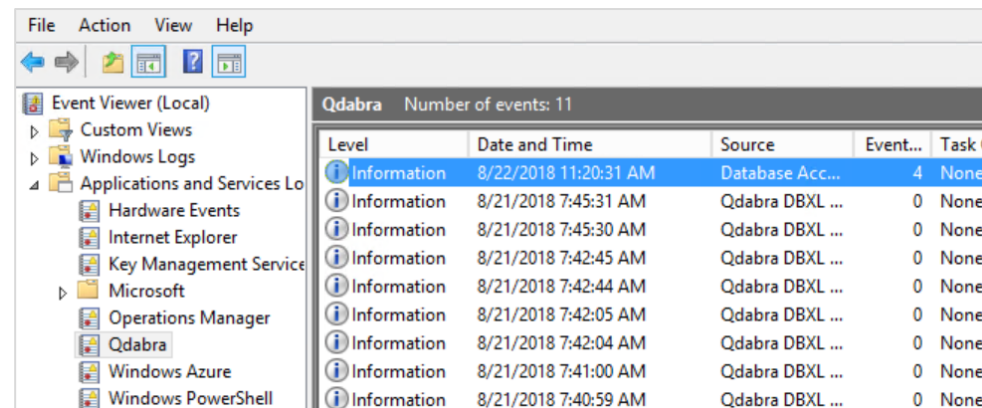
You will see another bar, called **Configuration Status**, indicating the progress of the installer. This status will change as the installation executes. When it finishes, click **Close** in the **Installation Complete** screen. Internet Explorer will open showing default.htm, from where you can access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

## POST INSTALLATION

### VERIFY YOUR INSTALLATION

#### EVENT VIEWER

Please check the server's Event Viewer, and specifically the event log named "Qdabra" to identify whether any error occurred during installation. You can configure the server to send a DBXL Administrator email whenever an error is recorded in this event log. For information, see [this document](#).



Level	Date and Time	Source	Event...	Task C.
Information	8/22/2018 11:20:31 AM	Database Acc...	4	None
Information	8/21/2018 7:45:31 AM	Qdabra DBXL ...	0	None
Information	8/21/2018 7:45:30 AM	Qdabra DBXL ...	0	None
Information	8/21/2018 7:42:45 AM	Qdabra DBXL ...	0	None
Information	8/21/2018 7:42:44 AM	Qdabra DBXL ...	0	None
Information	8/21/2018 7:42:05 AM	Qdabra DBXL ...	0	None
Information	8/21/2018 7:42:04 AM	Qdabra DBXL ...	0	None
Information	8/21/2018 7:41:00 AM	Qdabra DBXL ...	0	None
Information	8/21/2018 7:40:59 AM	Qdabra DBXL ...	0	None

### DBXL ADMINISTRATION POOL

The DBXL Administration Tool, also known as DAT, is automatically set up during installation. You can verify that DAT was set up correctly by following these steps:

1. Open the default page:  
*http://<servername>/QdabraWebService/default.htm*. The servername will depend on the URL where DBXL was installed (from the Site tab during installation).
2. Click on the **DBXL Administration Tool** link.

HOME Catalog License

**QDABRA SOFTWARE** Database Accelerator Control Panel

**Configure Your Form**

- [DBXL Administration Tool](#) - Your dashboard to manage DBXL

**Tools**

- [Qdabra Query Builder \(Web Version\)](#)
- [Qdabra Report Builder](#)
- [DBXL Remote Event Receiver \(RER\)](#)
- [DBXL Migration Tool \(Document Deployer\)](#)

**Documentation**

- [Installation Guide](#)
- [Release Notes](#)
- [DBXL PDF Rendering Service Configuration](#)
- [DBXL Azure Installation Guide](#)
- [Online Product Documentation](#) - For the most recent documentation updates, visit Qdabra's website.

**Support**

- [End User License Agreement](#)
- [Qdabra Support](#)
- [DBXL Support Forum](#)

**Web Service Descriptions (+ Show)**

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Home Catalog DocType Tools License

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

**Document Type Configuration**  Show Descriptions

Group & Name	Form Version	# Docs	Last Uploaded	Last Uploaded By	Edit
[+] Uncategorized forms					
<b>System Document Types</b>					
Name	Form Version	# Docs	Last Uploaded	... By	Edit
<a href="#">QdAttachment</a>	1.0.0.9	0	8/15/2018 1:32:46	DBXL-WS2012\dbxladmin	<a href="#">Edit</a>
<a href="#">QdCategory</a>	1.0.0.1032	0	8/16/2018 8:03:06	DBXL-WS2012\dbxladmin	<a href="#">Edit</a>
<a href="#">QdDocumentIndexFields</a>	1.0.0.27	34	8/15/2018 8:34:56	DBXL-WS2012\dbxladmin	<a href="#">Edit</a>
<a href="#">QdDocumentType</a>	1.0.0.25	35	8/16/2018 8:03:07	DBXL-WS2012\dbxladmin	<a href="#">Edit</a>
<a href="#">QdDocumentTypePermissions</a>	1.0.0.24	34	8/16/2018 8:03:07	DBXL-WS2012\dbxladmin	<a href="#">Edit</a>
<a href="#">QdDocumentTypeProperties</a>	1.0.0.25	34	8/15/2018 1:32:47	DBXL-WS2012\dbxladmin	<a href="#">Edit</a>
<a href="#">QdMapping</a>	1.0.0.28	34	8/16/2018 8:03:09	DBXL-WS2012\dbxladmin	<a href="#">Edit</a>
<a href="#">QdNodeNamespaces</a>	1.0.0.20	34	8/15/2018 1:32:49	DBXL-WS2012\dbxladmin	<a href="#">Edit</a>
<a href="#">QdRefIdInfo</a>	1.0.0.17	2	8/16/2018 8:03:11	DBXL-WS2012\dbxladmin	<a href="#">Edit</a>
<a href="#">QdSharePointListMaps</a>		36	12/31/1900 4:00:00	System DocType Handler	<a href="#">Edit</a>

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Web Service URL: <http://dbxl-ws2012/QdabraWebService/DbxlDocumentService.aspx>  
 DBXL Version: 3.3.2018.0731  
 User: DBXL-WS2012\dbxladmin

## SYSTEM DOCUMENT TYPES

In DAT, verify that the system document types (needed by DBXL to operate) were created during installation. Expand the section for System document types. You should see the following:

## LICENSING

DBXL comes with a trial license that is automatically configured during installation. Verify that the license was configured. In DAT, click on **Configure Licenses**. If you do not see a DBXL Trial License already configured AND you are a member of the DBXL Admins group, your installation has run into issues. Please contact Qdabra Software.

Home Catalog DocType Tools **License**

Qdabra DBXL  
Administration Tool **Manage License**

**Add License Pack**

License File  Browse... Contact Email  Add License Pack

**Installed License Packs**

Expires	Serial Number	Name	Contact Email	Doc. Types	Docs	ADWS	Del
2018-09-15	DBXL3.3-2018011510503845444	Qdabra Software	TriaDBXL@Qdabra.com	5	200	<input checked="" type="checkbox"/>	
Total Installed:				5	200		
In Use:				5	200		
Remaining:				0	0		

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[www.qdabra.com](http://www.qdabra.com)

English ▾

Web Service URL: <http://dbxl-ws2012/QdabraWebService/DbxlDocumentService.asmx>  
DBXL Version: 3.3.2018.0731  
User: DBXL-WS2012\dbxladmin

**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 Reference ID, type the ID into the field, and then click Query.

Starting Doc. ID:  Range:  Reference 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

**Documents**

Doc. ID	Reference ID	Version #	Name	Author	Description	Open	History
<input type="checkbox"/> 28422	1	1				<a href="#">Open</a>	<a href="#">History</a>
<input type="checkbox"/> 28423	2	1				<a href="#">Open</a>	<a href="#">History</a>
<input type="checkbox"/> 28424	3	1				<a href="#">Open</a>	<a href="#">History</a>
<input type="checkbox"/> 28425	4	1				<a href="#">Open</a>	<a href="#">History</a>

Total Documents: 4

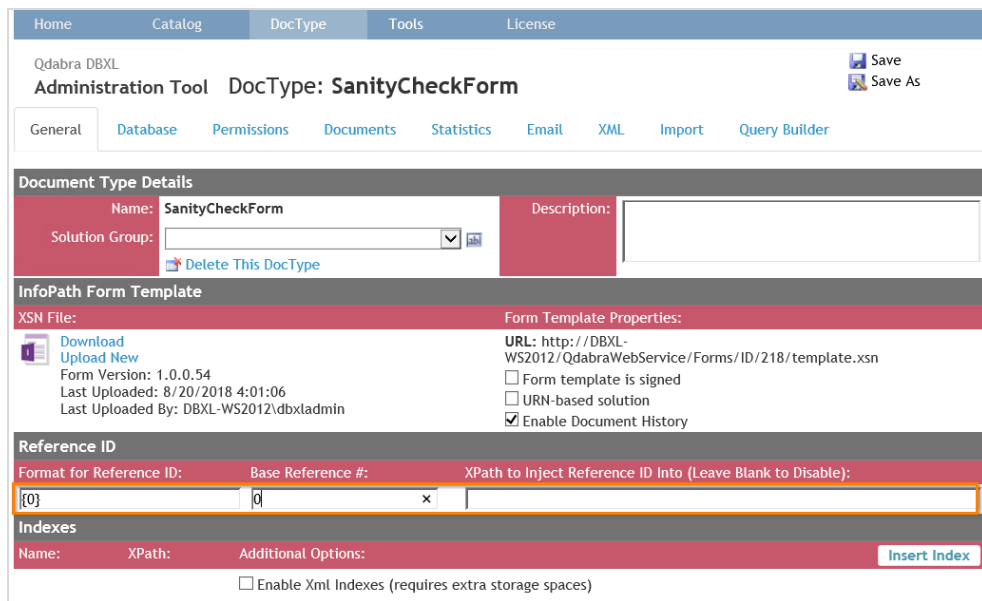
## ENABLING THE REF ID

The Reference ID works as an incrementing index for XML documents:

This feature has been intentionally disabled for DBXL v3.1 or higher but can be re-enabled at the General tab by setting either of the conditions below:

- Setting the **Format for Reference ID** to the value {0}
- Setting the **Xpath to Inject Reference ID into** to an *xpath* in the form

Here's an example of how to set the **Format for Reference ID** to the value {0}:



The screenshot shows the 'Administration Tool' for 'DocType: SanityCheckForm'. The interface includes a navigation menu with options like 'Home', 'Catalog', 'DocType', 'Tools', and 'License'. Below the navigation, there are tabs for 'General', 'Database', 'Permissions', 'Documents', 'Statistics', 'Email', 'XML', 'Import', and 'Query Builder'. The main content area is divided into several sections:

- Document Type Details:** Shows the Name as 'SanityCheckForm' and a Description field.
- InfoPath Form Template:** Displays XSN File information (Download, Upload New, Form Version: 1.0.0.54, Last Uploaded: 8/20/2018 4:01:06, Last Uploaded By: DBXL-WS2012\dbxladmin) and Form Template Properties (URL: http://DBXL-WS2012/QdabraWebService/Forms/ID/218/template.xsn, checkboxes for 'Form template is signed', 'URN-based solution', and 'Enable Document History').
- Reference ID:** A table with columns for 'Format for Reference ID:', 'Base Reference #:', and 'XPath to Inject Reference ID Into (Leave Blank to Disable):'. The first row shows '[0]', '0', and 'x' respectively.
- Indexes:** A table with columns for 'Name:', 'XPath:', and 'Additional Options:'. There is an 'Insert Index' button and a checkbox for 'Enable Xml Indexes (requires extra storage spaces)'.

Base Reference on the other hand is the starting point of the index. Setting this to 0 means your Ref ID index will begin with number "1".

## CLEAN UP A PRE-EXISTING INSTALLATION

If you encountered issues during an installation of DBXL, you might need to clean up a previously installed instance before running the installer again. Here are some items to check before trying the installer again:

1. Are there app pools and QdabraWebService directories? Check this using the IIS Manager and remove if present. The Dbxl App pool name will be DbxlAppPoolXXX where XXX is the website ID.
2. Use SQL Server Management Studio to delete any databases that were created (namely QdabraDBXL and QdabraUtility).
3. After performing the above cleanup steps, perform an iisreset, and then try reinstalling DBXL.

## SUPPORT

If you have encountered issues while installing DBXL, please contact Qdabra at [support@qdabra.com](mailto:support@qdabra.com).

If DBXL has been successfully installed try out the Getting Started document, which is linked from DBXL's default.htm page.

For any other questions not covered in this document, please contact Qdabra Software.

## CONTACT INFORMATION

Qdabra Software  
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Kirkland, WA 98033

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Email: [Support@Qdabra.com](mailto:Support@Qdabra.com)  
Website: <http://www.qdabra.com>  
Community: <http://www.infopathdev.com>