

QDABRA DBXL RENDERING SERVICE INSTALLATION GUIDE

 2/17/2020 | Contributor: 

Overview

This document will guide you through the installation of the Qdabra DBXL Rendering Service. If you have any questions about the service that is not discussed in this document, please contact support@qdabra.com for assistance.

Pre-requisites

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

Note

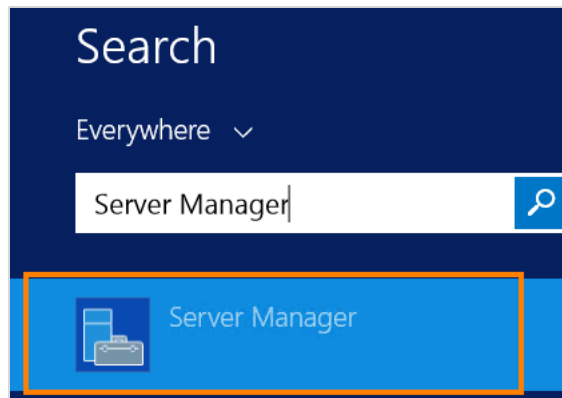
This guide assumes that the SMTP Service of the Internet Information Services (IIS) is installed and configured on your server to send e-mail from an ASP.NET Web application.

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

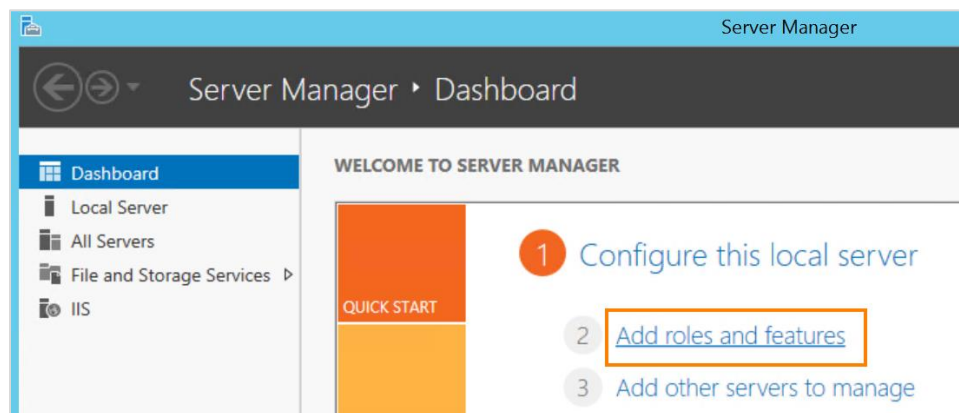
Install the SMTP Service

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.

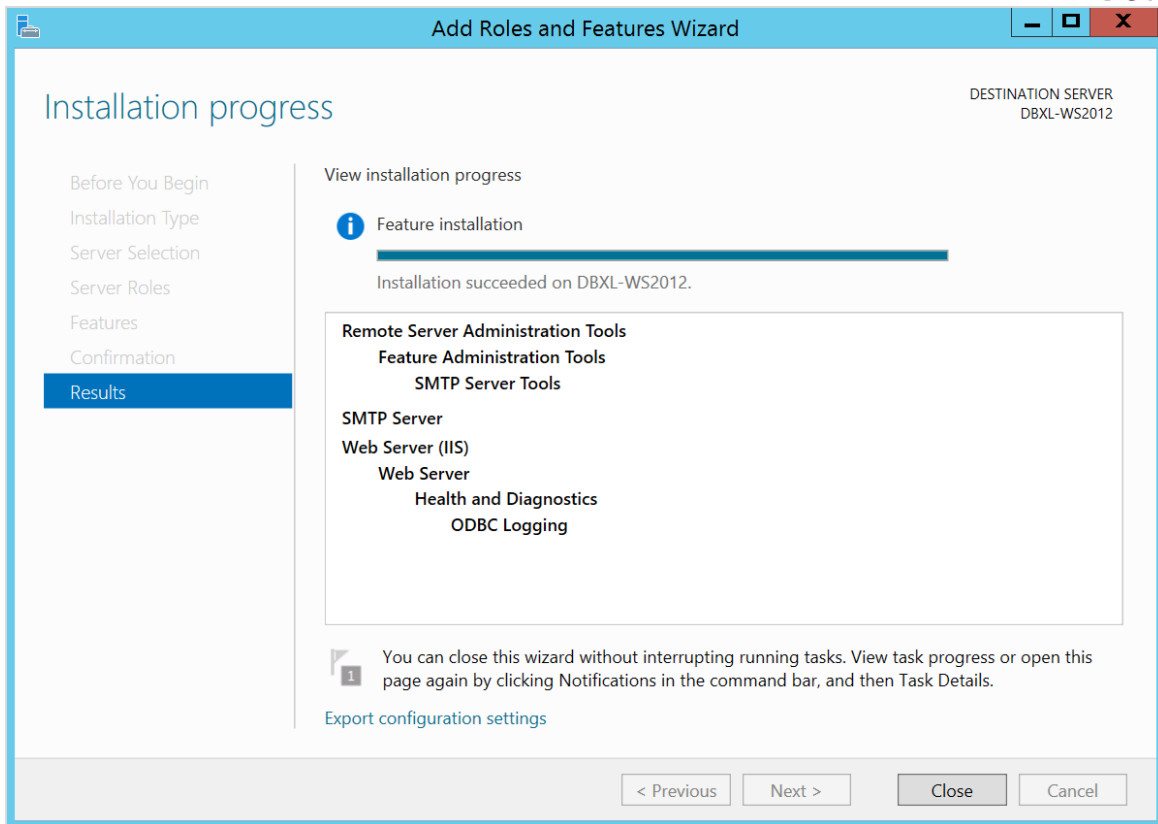
1. On the **Start** menu, click the **Search** icon, type in *Server Manager*, and then click the **Server Manager** App:



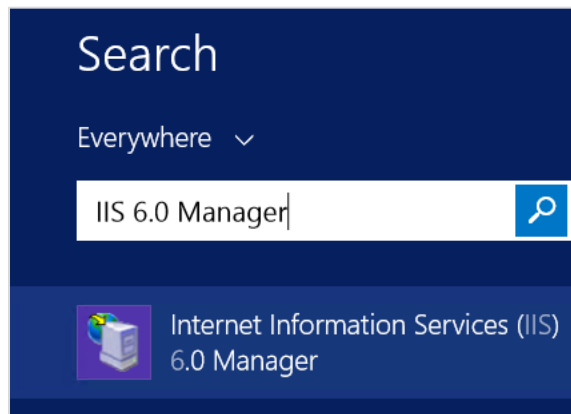
- From the **Server Manager** → **Dashboard**, click **Add roles and features**:



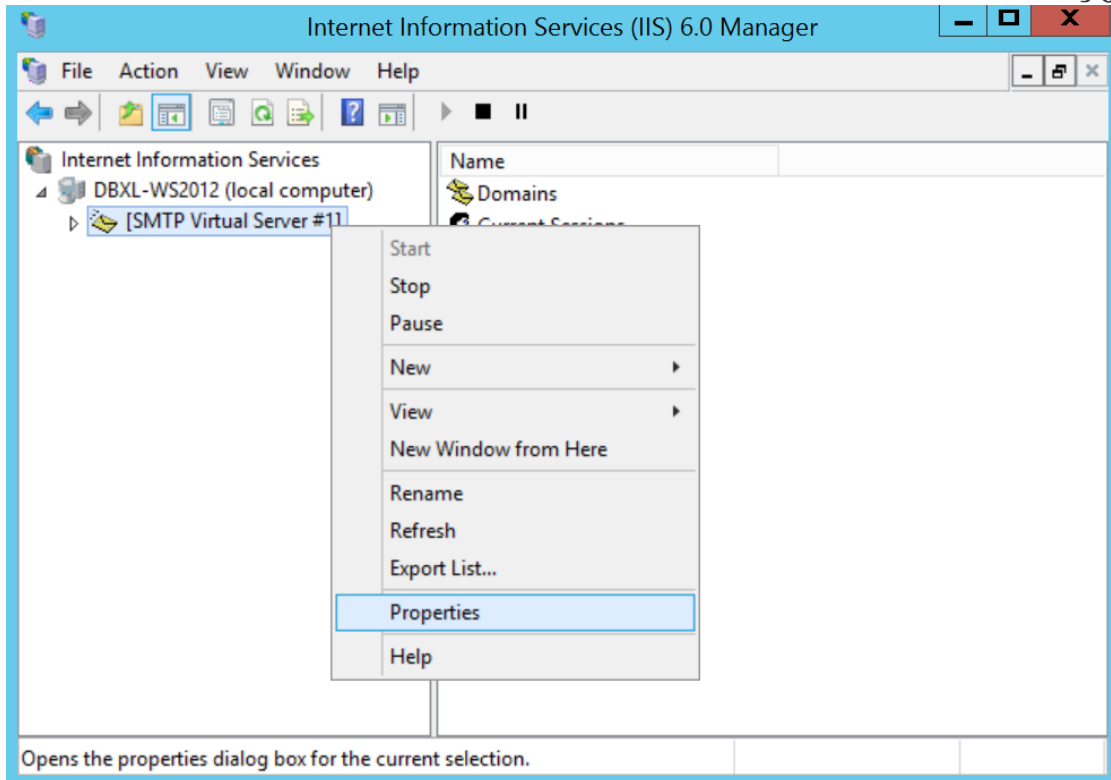
- Click **Next** on the **Before You Begin** page.
- Select **Role-based or feature-based installation** and click **Next**.
- Select a desired server and click **Next**.
- In the **Server Roles** section, tick **Web Server (IIS)**. You may need to add/install this feature if not yet installed. Click **Next**.
- In the **Features** section, Tick **SMTP Server** and install.



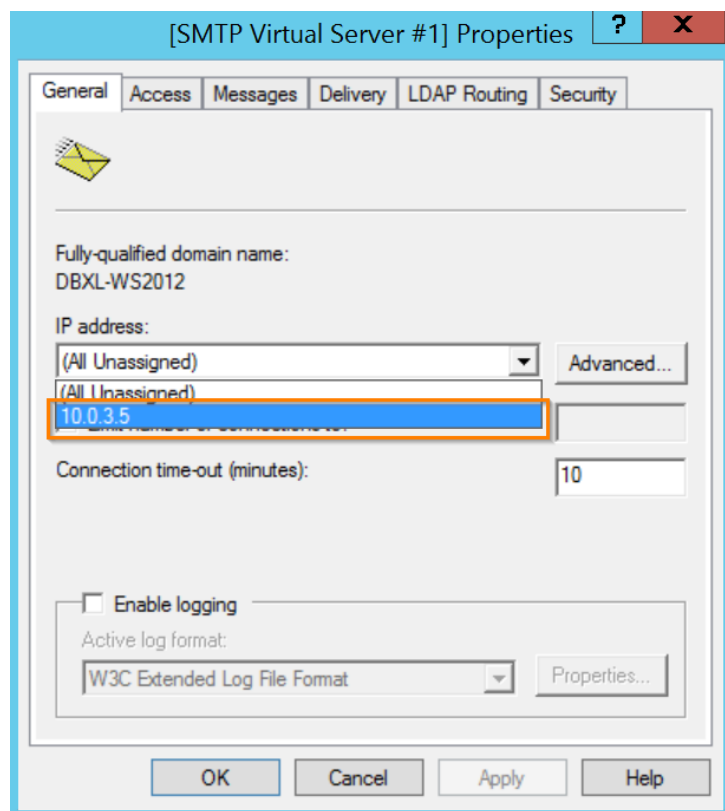
- After the installation, open the **Start** Menu. Type in *IIS 6.0 Manager* in the search box, and click to run the program:



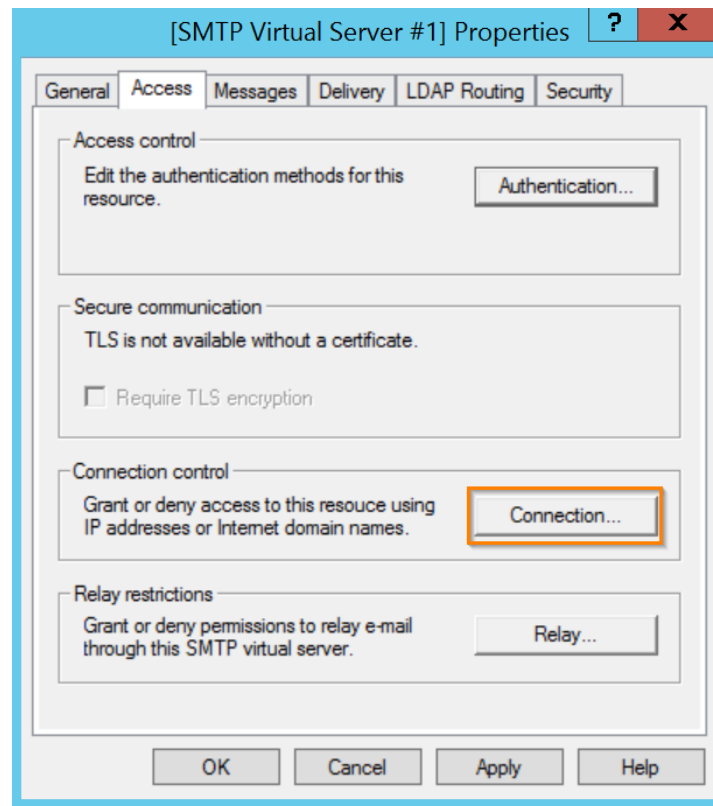
- Right-click **SMTP Virtual Server** and click **Properties**.



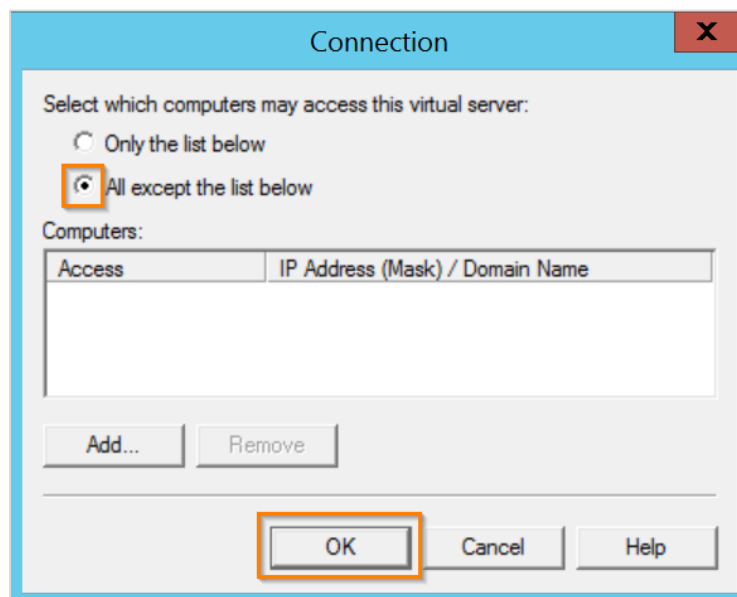
10. Select the Server's local IP address (This should be the only IP address in the drop down).



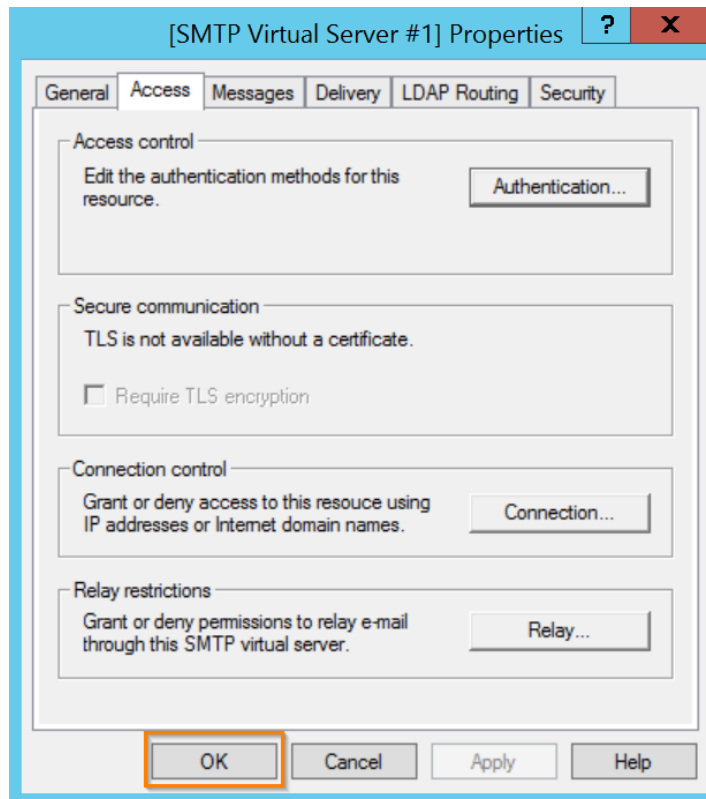
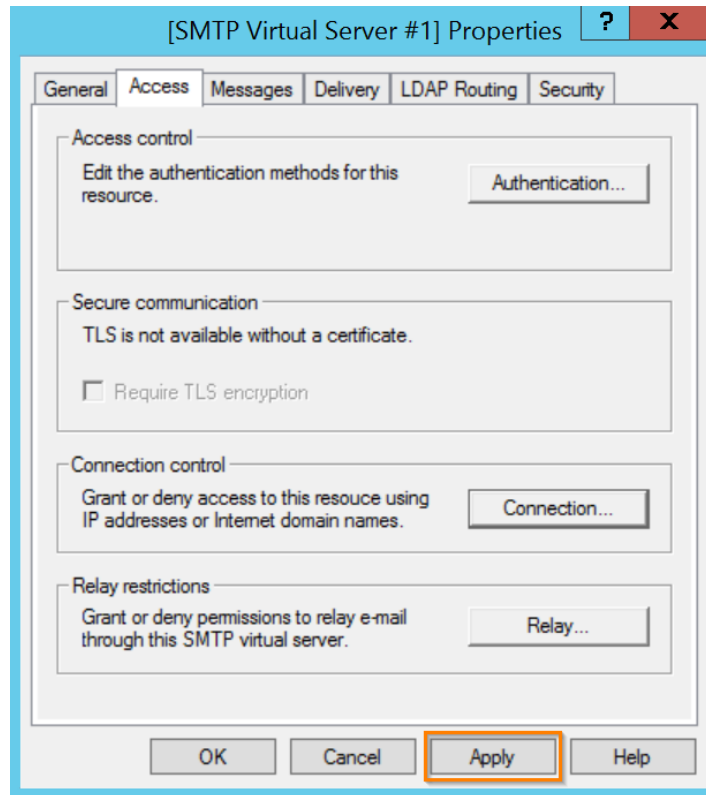
11. Click the **Access** Tab.
12. Click the **Connection** button under the Connection control section.



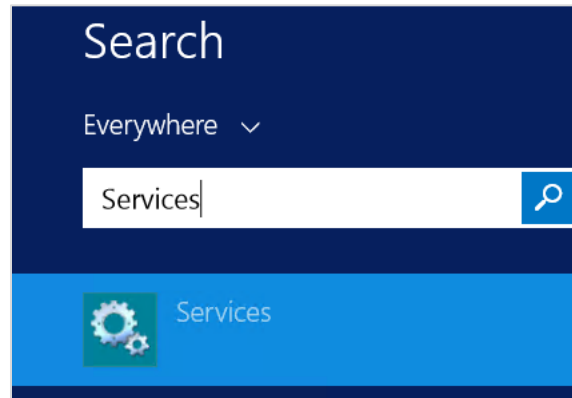
13. Select **All except the list below** option and click **OK**.



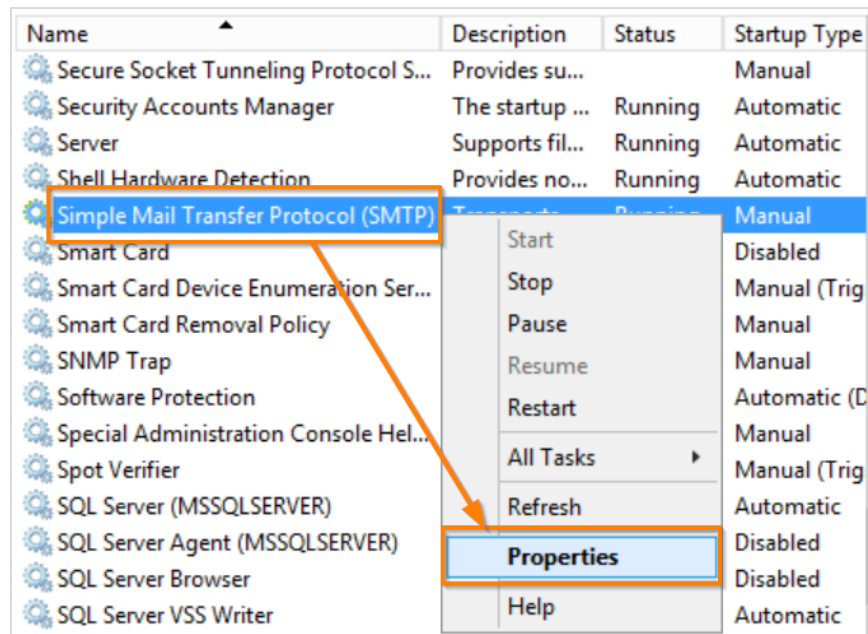
14. Click **Apply** and **OK**.



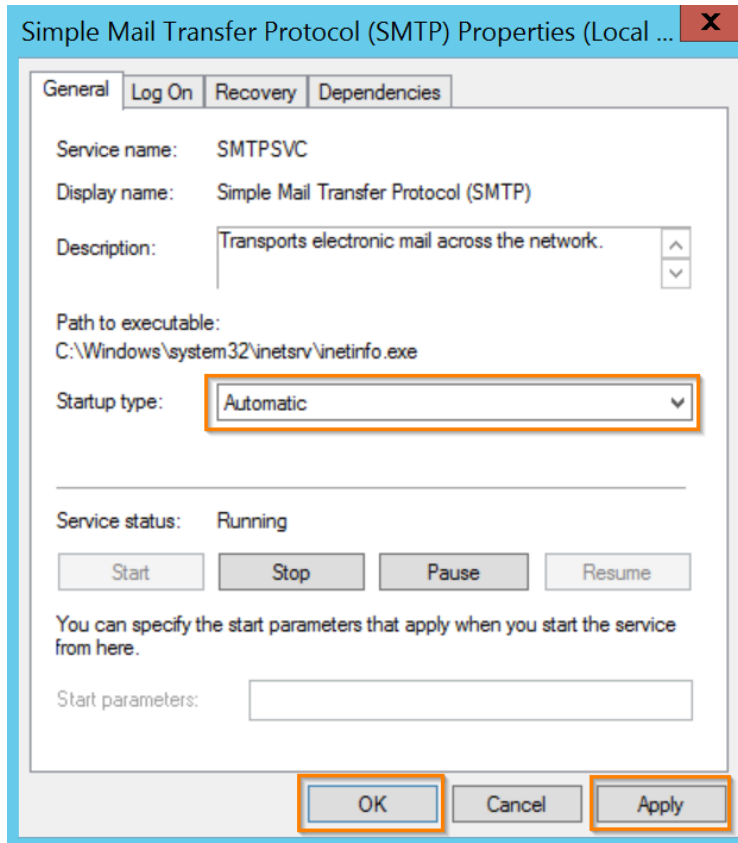
15. Open the **Start** Menu, type in *Services* in the search box, and click to run the program:



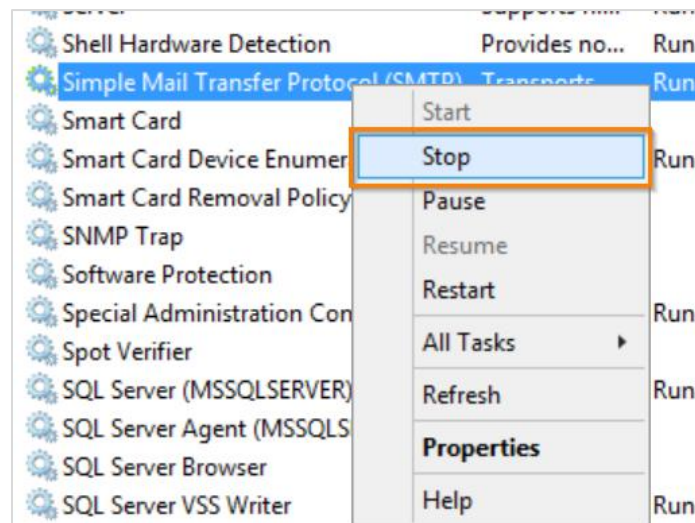
16. Right click on **Simple Mail Transfer Protocol (SMTP)** and click **Properties**.

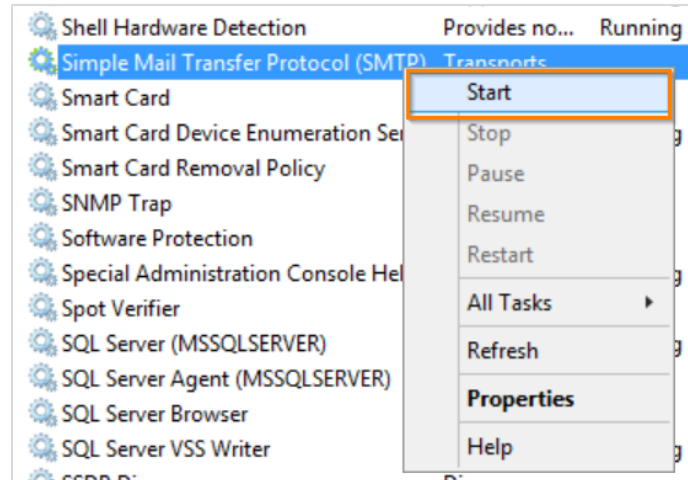


17. Set the **Startup Type** to **Automatic**. Then click **Apply** and **OK**.



18. Stop and Start the Service.





19. Click **OK**.

DBXL Administration Tool

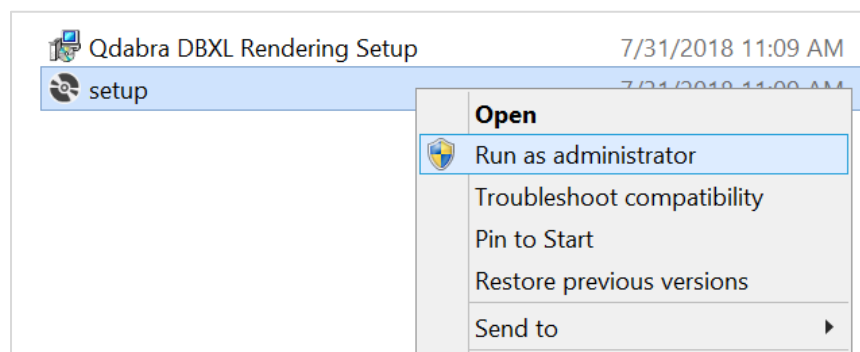
Another requirement for the DBXL Rendering Service is the DBXL Administration Tool – which will allow the PDF Rendering feature to run.

To install Qdabra’s DBXL, kindly download the trial version [here](#) and follow the steps in the documentation guide included in the package.

If DBXL is already installed, please proceed on installing the Qdabra DBXL Rendering Service.

Install the Qdabra DBXL Rendering Service

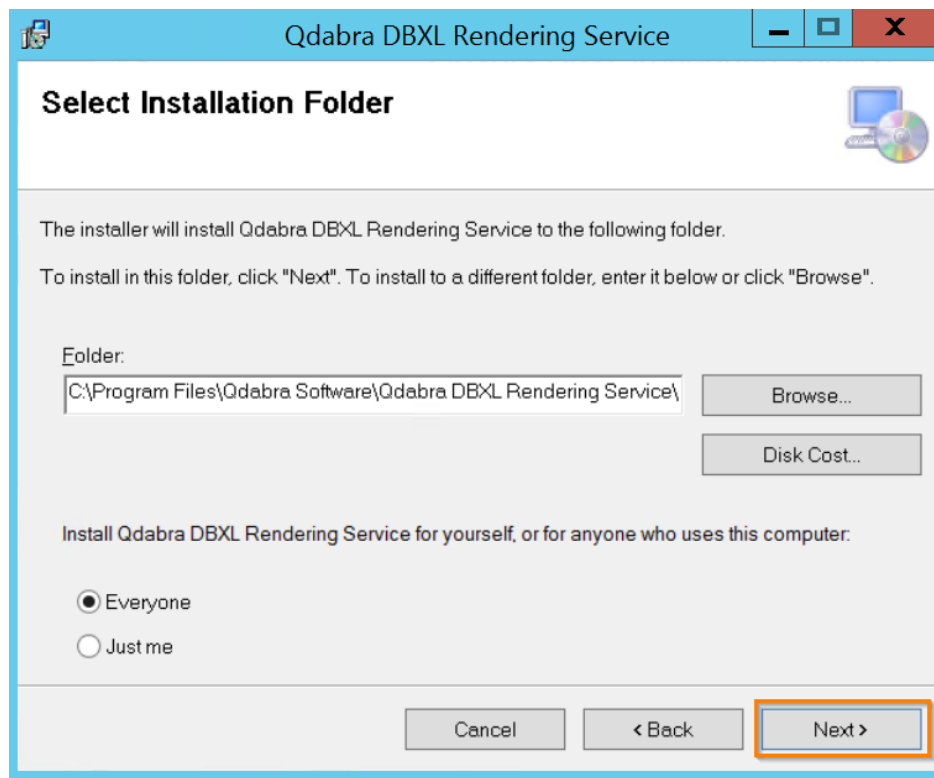
1. Right click **setup.exe** and select Run as Administrator.



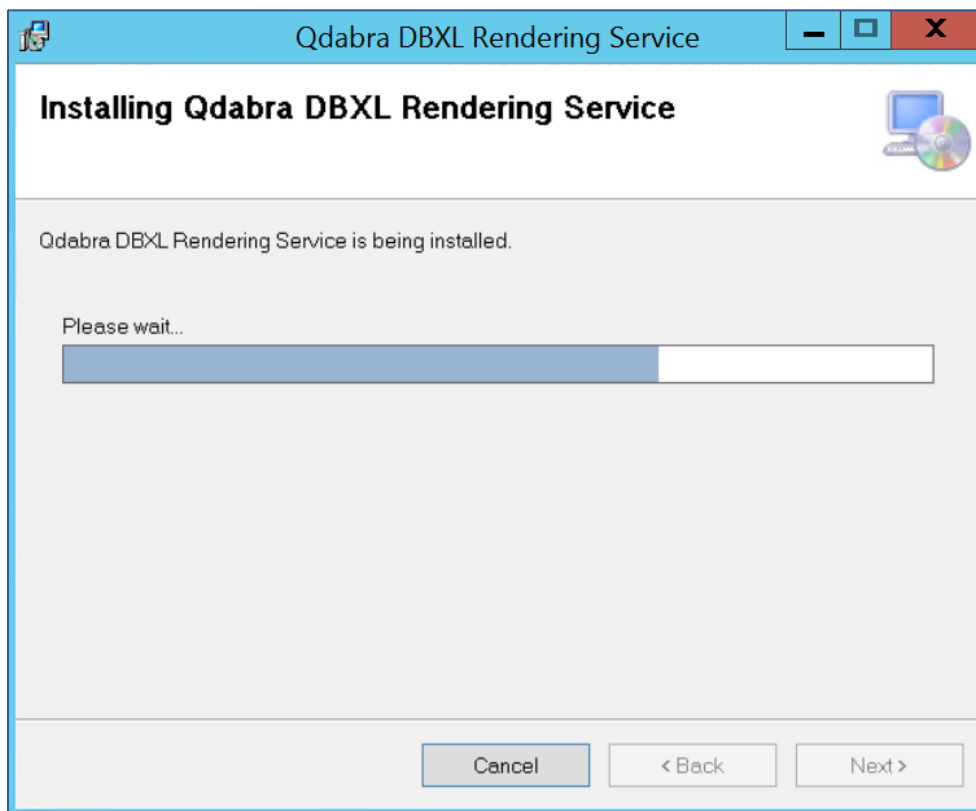
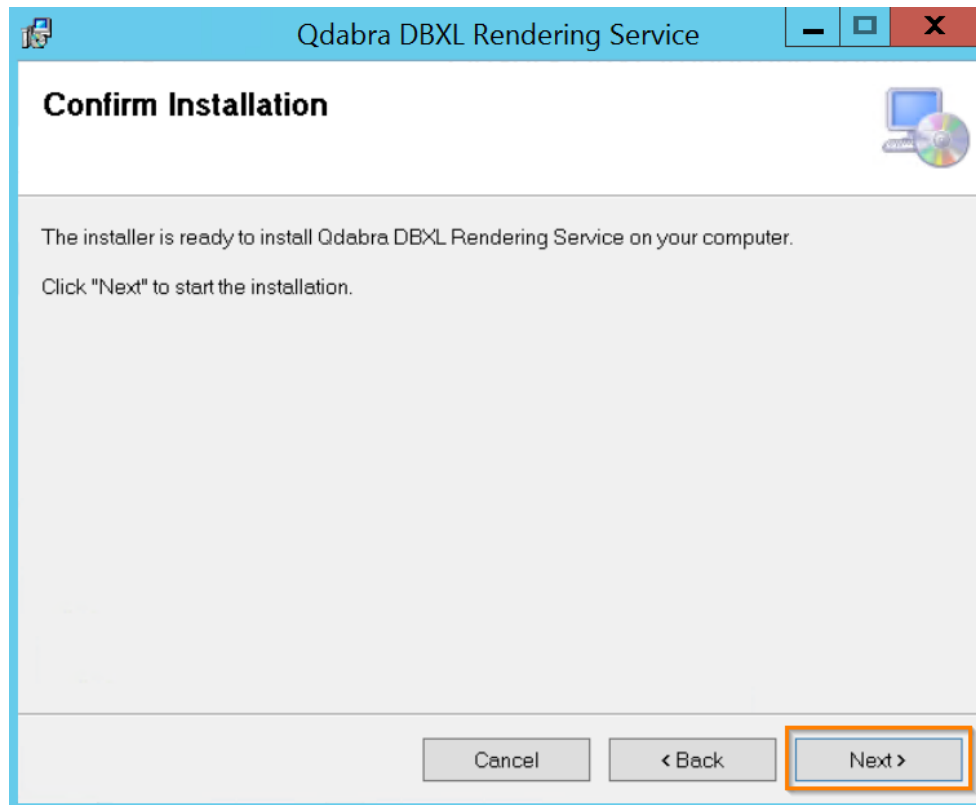
2. Click **Next** in the Welcome screen.



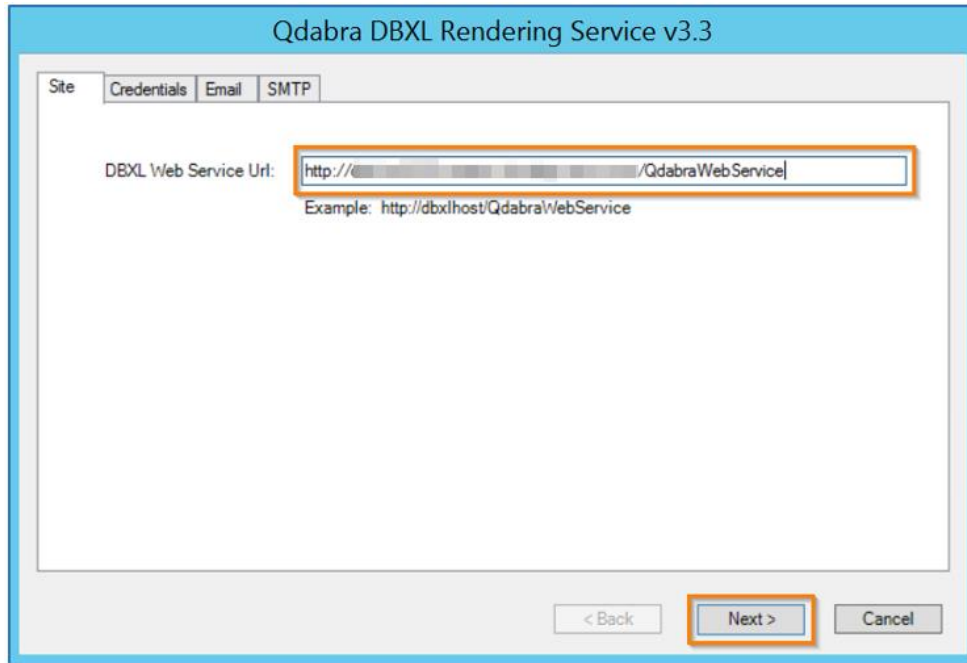
3. Select the Installation folder location (the installer selects the existing Qdabra Software folder location by default: C:\Program Files\Qdabra Software\Qdabra DBXL Rendering Service\). Click **Next**.



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

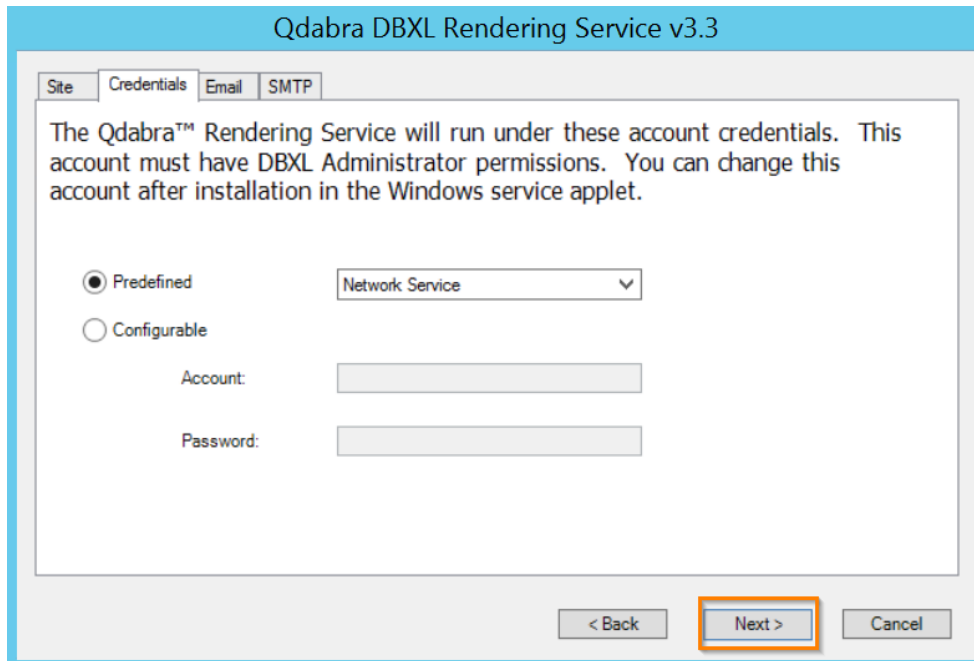


5. In the **Site** tab, enter the DBXL Web Service URL. Note that the URL entered here should be the *fully qualified URL* used by DBXL. Click **Next**.



The screenshot shows the 'Site' tab of the 'Qdabra DBXL Rendering Service v3.3' installation wizard. The 'DBXL Web Service Url:' field is highlighted with an orange box and contains the text 'http://[redacted]/QdabraWebService'. Below the field, an example URL is provided: 'Example: http://dbxlhost/QdabraWebService'. At the bottom of the window, the 'Next >' button is also highlighted with an orange box.

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



The screenshot shows the 'Credentials' tab of the 'Qdabra DBXL Rendering Service v3.3' installation wizard. It contains the following text: '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.' Below this text, there are two radio button options: 'Predefined' (which is selected) and 'Configurable'. To the right of the 'Predefined' option is a dropdown menu showing 'Network Service'. Below the 'Configurable' option are two text input fields labeled 'Account:' and 'Password:'. At the bottom of the window, the 'Next >' button is highlighted with an orange box.

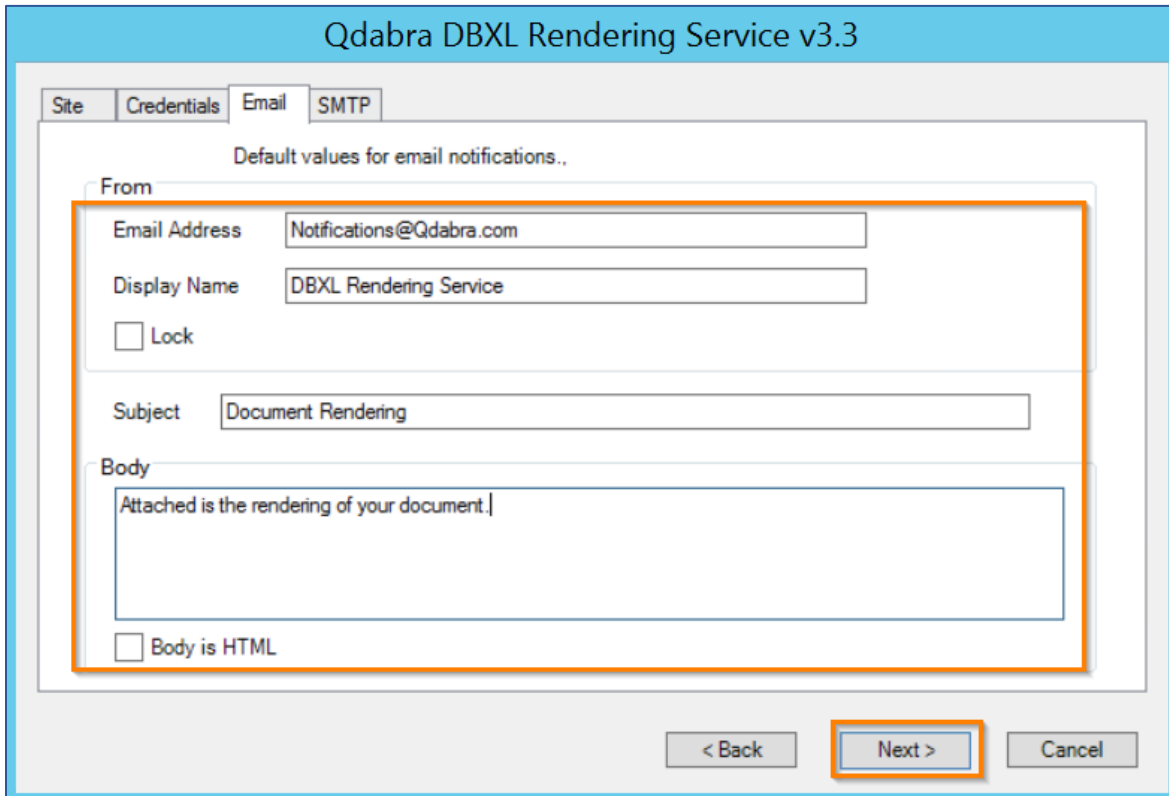
- If you select Configurable, you must provide an Account and Password.

Configurable

Account:

Password:

7. Click **Next** to proceed to the next tab.
8. Configure the Email settings:



Qdabra DBXL Rendering Service v3.3

Site | Credentials | **Email** | SMTP

Default values for email notifications..

From

Email Address:

Display Name:

Lock

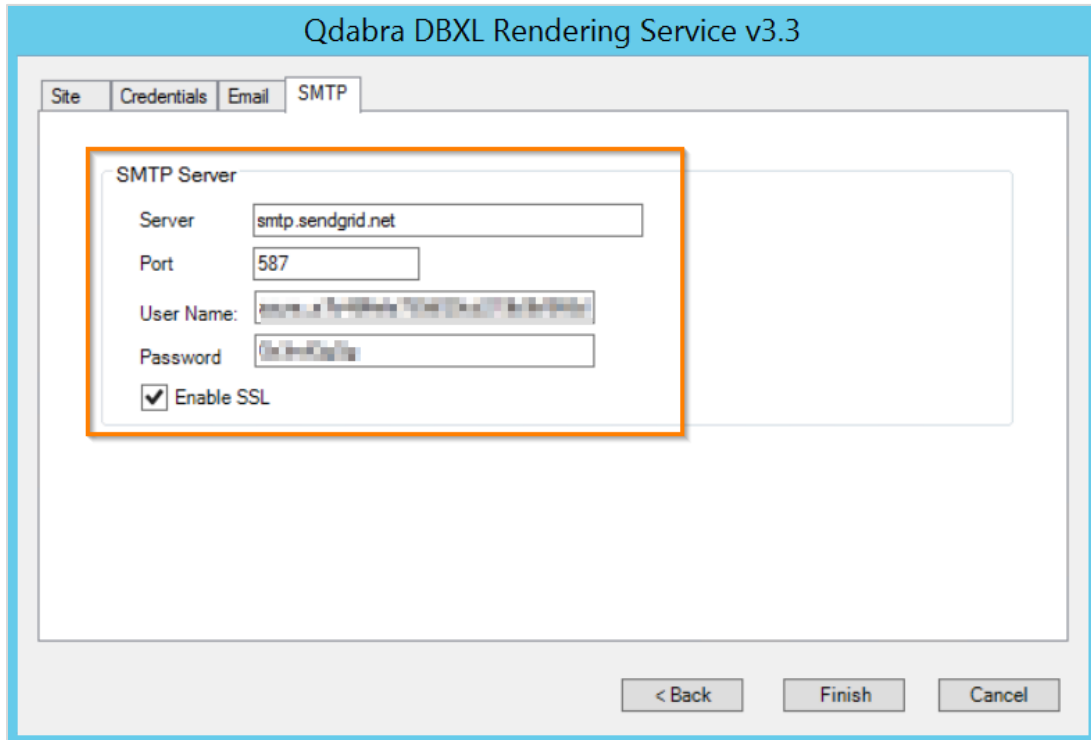
Subject:

Body

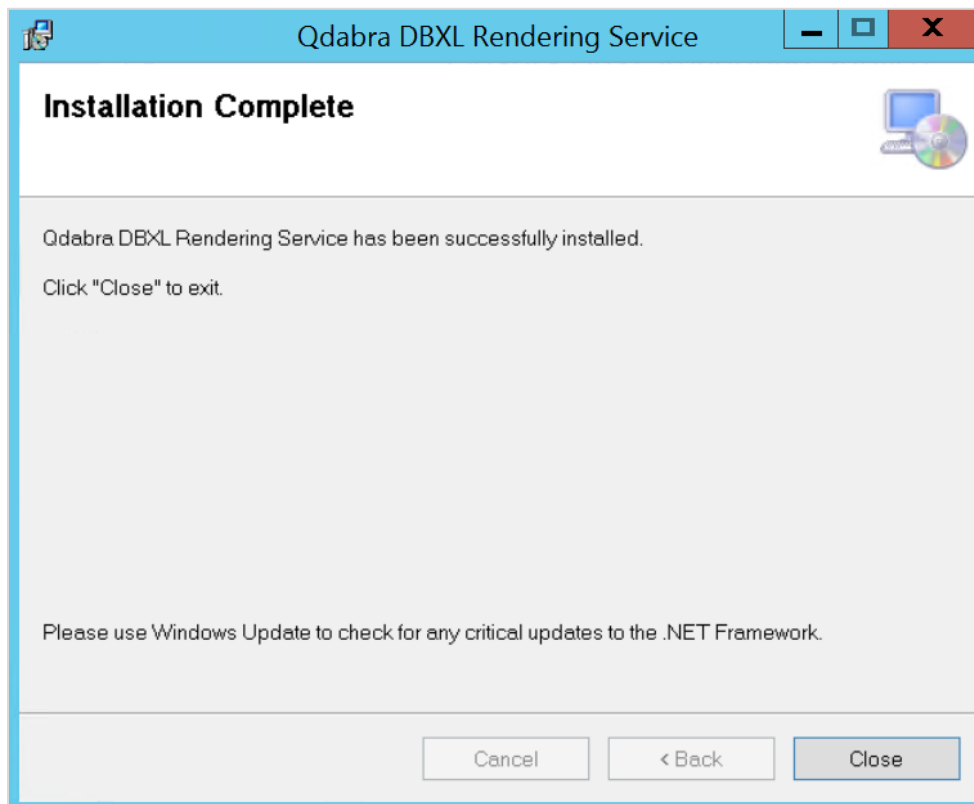
Body is HTML

< Back | **Next >** | Cancel

9. Click **Next** to proceed to the next tab.
10. 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.



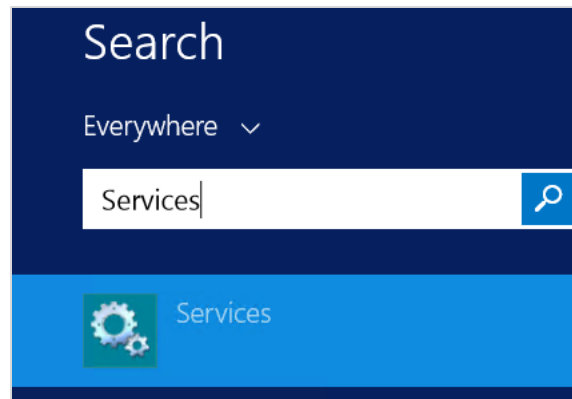
11. Click **Finish** to complete the installation process.



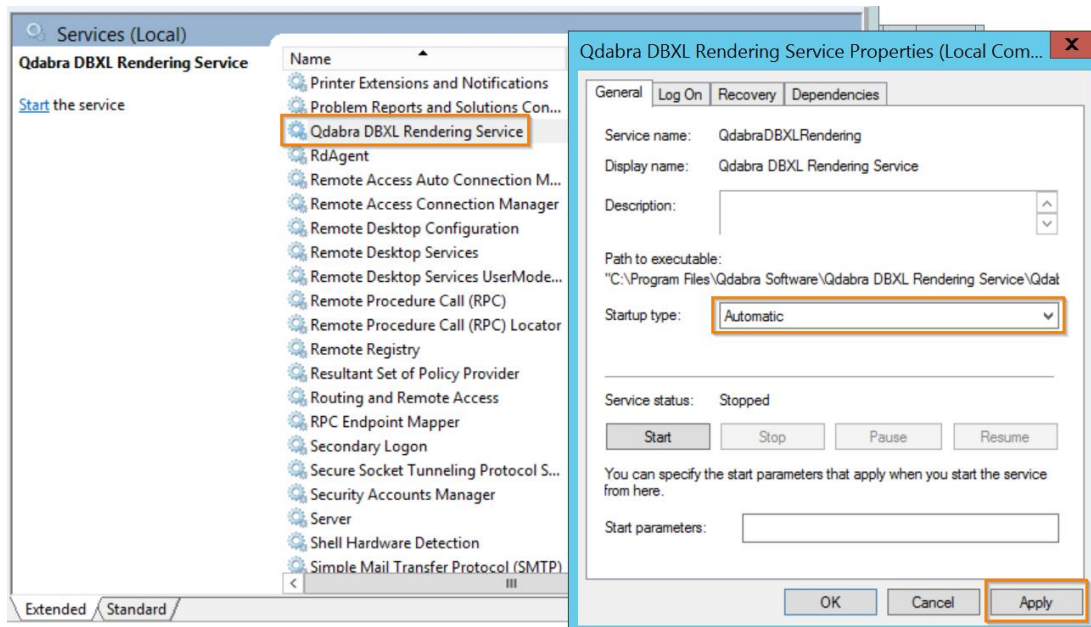
12. Close the installation wizard.

Start the Qdabra DBXL Rendering Service

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



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



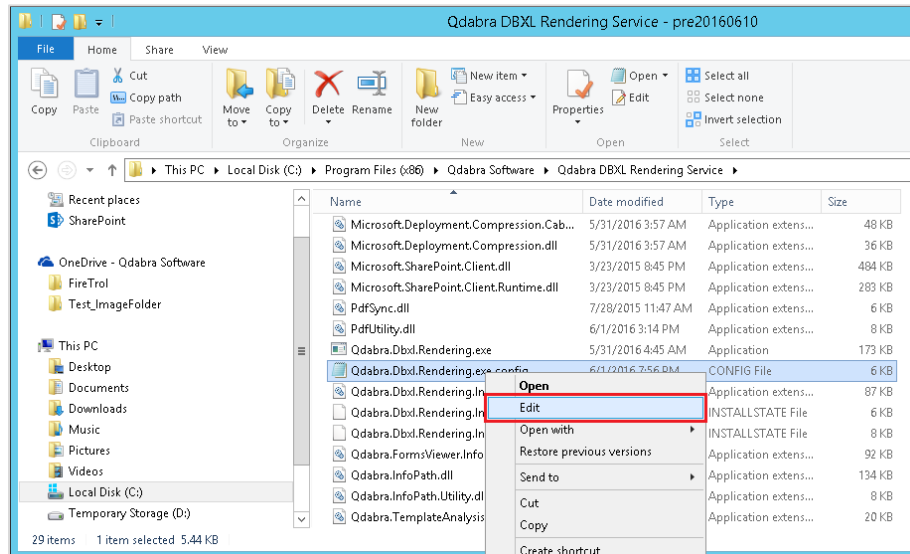
5. Click the **Start** button and click **OK**.

NOTE: If the Start option is greyed out and will not start, 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

If the DBXL Rendering Service needs to be configured manually, follow the steps below:

1. Locate the folder where DBXL Rendering Service is installed. By default, the files will be installed in C:\Program Files\Qdabra Software\Qdabra DBXL Rendering Service.
2. Inside the Qdabra DBXL Rendering Service folder, edit the Qdabra.Dbxl.Rendering.exe.config using a text editor such as Notepad or Notepad++.



Here's how the config file will appear in Notepad++:

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <startup useLegacyV2RuntimeActivationPolicy="true">
    <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.5.2" />
  </startup>

  <connectionStrings>
    <clear />
    <add name="DBXLUtility" providerName="System.Data.SqlClient" connectionString="Data
Source=;Initial Catalog=QdabraUtilityTest20191127;Integrated Security=TRUE" />
  </connectionStrings>

  <appSettings>
    <add key="XSNSStoragePath" value="" />
    <add key="DBXL_URL" value="http://.azure.com/QdabraWebService" />
    <add key="ClientSettingsProvider.ServiceUri" value="" />

    <add key="Smtplib_Servername" value="smtp.sendgrid.net" />
    <add key="Smtplib_Port" value="587" />
    <add key="Smtplib_UserName" value="" />
    <add key="Smtplib_SequenceNumber" value="" />
    <add key="Smtplib_Password" value="" />
    <add key="Smtplib_EnableSsl" value="true" />

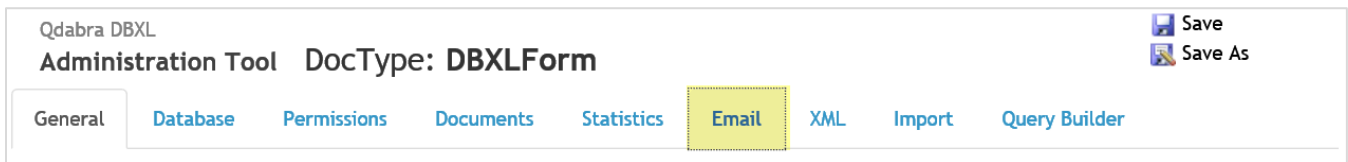
    <add key="Email_Subject" value="Document Rendering" />
    <add key="Email_Body" value="" />
    <add key="Email_BodyIsHtml" value="false" />
    <add key="Email_FromAddress" value="Notifications@Qdabra.com" />
    <add key="Email_FromDisplayName" value="DBXL Rendering Service" />
    <add key="Email_FromLocked" value="false" />
  </appSettings>
</configuration>
```

Notice that the highlighted values are the ones specified when the Qdabra DBXL Rendering Service was installed. Editing these values spontaneously updates the settings of the service.

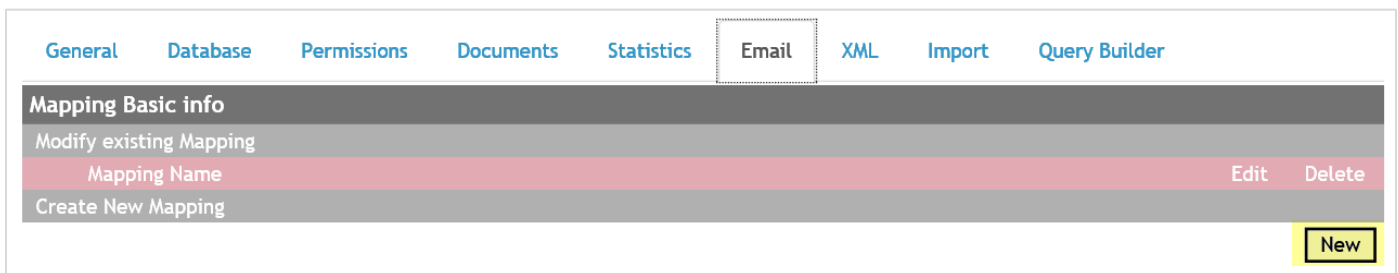
Create an Email Mapping

In this section, we will create the Email mapping configuration in DAT.

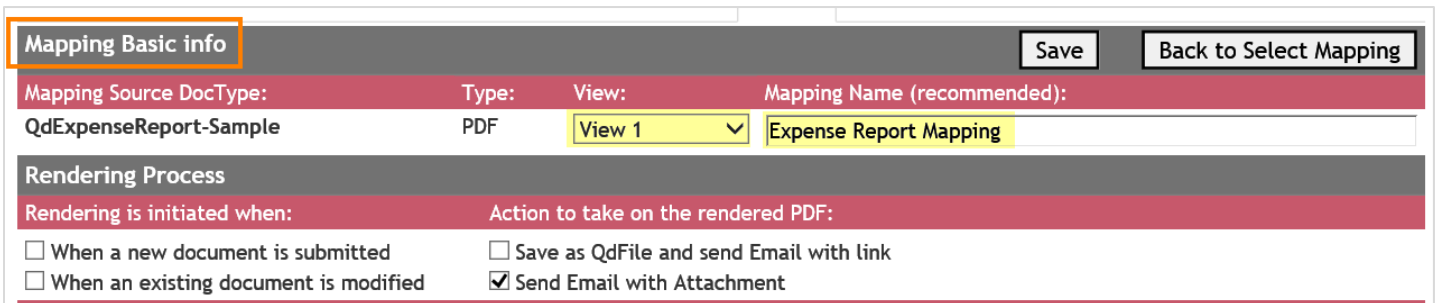
1. Select the Document Type in DBXL you'd like to add the mapping to.
2. Click the **Email** tab to open the Email Mapping configuration page.



3. Click on **New** button to create an Email Mapping for the current doctype.



4. In the **Mapping Basic Info** section, select the view to render as PDF and enter a mapping name.



5. In the **Rendering Process** section, you can configure the mapping so that it runs based on a condition.

Below are the options for initiation:

- **When a new document is submitted**
 - Select this option if you need the mapping to run each time a new document is submitted

- **When an existing document is modified**
 - Select this option if you need the mapping to run each time an existing document is modified

Below are the actions to take on the rendered PDF:

- **Save as QdFile and send Email with link**
 - Select this option if you want to save the PDF under the QdFile system doctype and send an Email with a link
- **Send Email with Attachment**
 - Select this option if you want to send an email with the PDF attachment

Note that you can select a combination of these conditions:

Rendering Process	
Rendering is initiated when:	Action to take on the rendered PDF:
<input checked="" type="checkbox"/> When a new document is submitted	<input type="checkbox"/> Save as QdFile and send Email with link
<input checked="" type="checkbox"/> When an existing document is modified	<input checked="" type="checkbox"/> Send Email with Attachment

6. In the **PDF Naming** section, you can enter the XPath to a field that contains the name for your PDF file.

PDF Naming:

7. In the **Additional Condition** section, add a condition so that the email will be sent based on a condition set by your form rules.

Additional Condition:


8. **Archival location:** If you want to save the PDF files into a local folder in your server, you may enter the path here. This is a very nice feature and works wonderfully with OneDrive for synching PDF files to SharePoint 2013 and Office 365. See this [document](#) for reference.

Archival location:

9. **Rendering Contents:** For the Email Subject, you may choose from **Static Text** or **XPath Expression**. In this example, I have selected an XPath Expression and added a concat function to combine "Expense Report" with the Employee Name. For Body, select View option and select the view from the dropdown field.

Rendering Contents	
Email Subject:	Body:
<input type="radio"/> Static Text <input checked="" type="radio"/> XPath Expression	<input checked="" type="radio"/> View <input type="radio"/> HTML <input type="radio"/> Plain Text <input type="checkbox"/> XPath Expression
<input type="text" value="concat('Expense Report ', /my:expenseReport/my:employee/my:name)"/>	<input type="text" value="View 1"/>

10. **Attachments:** Enter the XPath of the field where attachments are bound to. As an option, you can also enter the Archival Location and file name for archiving the PDF files.

Attachments:			
XPath of attachment:	Email:	Archive Location (optional):	File Name (optional): 
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Add attachment			

11. Email Address

- **From Address:** Select static for type and enter the email address you want to use for sending out the emails. This could be a group email (e.g. Notifications@YourCompany.com) or any emails you prefer to use for this solution. When selecting dynamic option, you need to enter an XPath in the Email Address and Display Name fields.

Email Address			
	Type:	Email Address: (XPath for Dynamic):	Display Name (Optional, XPath for Dynamic):
From Address	<input type="text" value="static"/>	<input type="text" value="Notifications@Qdabra.com"/>	<input type="text" value="Qdabra Software"/>

- **To Address:** This can be dynamic or static
 - **Option 1: Dynamic** – Next to the label "Dynamic (XPath)", enter the XPath to the field that contains the email address you want to send the email to. Also, enter the XPath to the field that contains the person's name (optional).

Email Address			
	Type:	Email Address: (XPath for Dynamic):	Display Name (Optional, XPath for Dynamic):
From Address	static	Notifications@Qdabra.com	Qdabra Software
To Address	Dynamic (XPath)	/my:expenseReport/my:employee/my:emailA	/my:expenseReport/my:employee/my:name
	Static	Add To Email Address	

- **Option 2: Static** – Next to the label “Static”, click **Add To Email Address** and enter the email address and Display Name of the person you want to send email to in the corresponding text boxes. Click **Add To Email Address** again if you need to add more email address.

Email Address			
	Type:	Email Address: (XPath for Dynamic):	Display Name (Optional, XPath for Dynamic):
From Address	static	Notifications@Qdabra.com	Qdabra Software
To Address	Dynamic (XPath)		
	Static	Add To Email Address	

Email Address			
	Type:	Email Address: (XPath for Dynamic):	Display Name (Optional, XPath for Dynamic):
From Address	static	Notifications@Qdabra.com	Qdabra Software
To Address	Dynamic (XPath)		
	Static	Jo-Anne.Tandaan@Qdabra.com	Jo-Anne Tandaan
		Add To Email Address	

12. Now you’re done with your mapping! Click **Save**.

General	Database	Permissions	Documents	Statistics	Email	XML	Import	Query Builder
Mapping Basic info						Save	Back to Select Mapping	
Mapping Source DocType:		Type:	View:	Mapping Name (recommended):				
DBXLForm		PDF	View 1	Expense Report Mapping				

Qdabra DBXL Administration Tool DocType: QdExpenseReport-Sample

General Database Permissions Documents Statistics Email XML Import Query Builder

Mapping Basic info Save Save As Back to Select Mapping

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

Rendering Process

Rendering is initiated when:

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

PDF Naming:

/my:myFields/my:FormInfo/my:FormName

Additional Condition:

/my:myFields/my:FormInfo/my:FormLink != ""

Message from webpage

Mapping saved successfully, Mapping ID: 973

OK

Test your mapping!

1. Submit a new a new document by opening your form. If the mapping is set to run based on a condition (e.g. When the mapping runs only if an existing document is modified, or additional condition are added), make sure that these conditions are satisfied when you submit a document.
2. If the mapping has been setup correctly, you will get an email with a PDF attachment. Here's an example:

Expense Report - Jo-Anne Tandan

Jo-Anne.Alfafara@qdabra.com

To Kaoru Okumura

Cc Jo-Anne Alfafara

20190124044512_Jo-Anne_Alfafara.pdf 42 KB

Hi Kaoru Okumura,

An expense report has been submitted for your approval.

Please click this [link](#) to open the form.

Thanks,
Admin

Additional Step 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\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.

Troubleshoot Errors

To troubleshoot errors encountered with the rendering service, please see this [document](#).

Contact Information

Qdabra Software
218 Main Street,
Suite 731,
Kirkland, WA
98033

Phone: 877.544.2389
Email: Support@Qdabra.com
Website: <http://www.qdabra.com>
Community: <http://www.infopathdev.com>