



Product: DBXL v2.5

Title: Migration Tool v2.5 User Guide

A DBXL solution is typically a complex system consisting of a database schema as well as several InfoPath templates, along with their corresponding DBXL settings and database mappings. Maintaining and deploying these can be a challenging task. The DBXL Document Deployer (also known as the Migration Tool) allows automating the process of building, updating and deploying DBXL solutions.

INTRODUCTION: EXPORT DOCUMENTS

The Document Deployer (Migration Tool) provides an easy-to-use interface for various actions related to Qdabra's Database Accelerator (DBXL).

For example, let's imagine that you want to create an offline back up of the documents (xml files) stored in one DBXL document type.

1. In **Start Menu > Programs > Qdabra > Tools > Migration Tool**, click on **DBXL Migration Tool UI** to open the tool.
2. Make sure you are in the **Export** tab.
3. Enter the source **DBXL Server Root** where you have created the Document Type. The URL will have the following structure: <http://<servername>/QdabraWebService>
4. Click **Connect**. You might be prompted for credentials, depending on your environment.

Document Deployer supports Basic authentication in addition to NTLM authentication. It uses the default credentials when connecting to DBXL. However, should the login fail it will present a blocking WinForm UI to the user prompting for the password. As of the current version, Document Deployer can only run unattended if login failures do not occur. Note that the username will be stored in the application settings.

5. You'll see a list of Document Types in the **Configuration** dropdown. Select the Document Type from this dropdown.
6. Click the **Documents** checkbox from the **Items to export** section.
7. Enter a local export path, or click on the **Select** button to navigate your local drive and select the folder.
8. Click **Run** to perform the export.

Voilà! All of the documents stored in the chosen document type have been exported.

This is one example of what the Migration Tool can accomplish. This document will provide an overview of other uses for the Migration Tool.



<http://www.qdabra.com>

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MIGRATE AN ENTIRE SOLUTION

The Migration Tool allows you to migrate complex solutions from one server to another. This is perhaps the best way to illustrate the power of the Migration Tool. The migration process can be broken up into these steps:

1. ANALYZE YOUR SOLUTION

Suppose you need to migrate a *Timecards* solution. There are two initial steps:

- a) Edit the *Timecard* configuration in DBXL and determine the list of SQL tables used to store the data. Let's say that Timecards store into two tables: *Hours* and *WorkItems*.
- b) Figure out the dependencies. For this, open the form in Design mode in InfoPath and inspect the secondary data sources. In a typical DBXL solution, data connections such as QueryDocuments or QueryDB are indicative of a dependency. Verify the web service arguments to find out which are the Document Types or SQL tables that we depend upon.

Repeat these two steps for all the Document Types involved in your solution. When done, you will end up with a Solution Manifest that will list all Document Types and dependencies. For example, in the case of the *Timecard* solution, the manifest will look like this:

```

Main Document Type: Timecard
Maps data into SQL tables: Hours, WorkItems
Depends on: TimecardConfig
Depends on: Employees
    Maps data into SQL tables: Employees
Depends on: Projects
    Maps data into SQL tables: Projects
  
```

2. CREATE SQL SCRIPTS

Now that you know what your solution is composed of, it is time to create the SQL scripts. If you are lucky you already have them around. Otherwise you'll need to create them. The easiest way to do so is by using SQL Server Management Studio. For every DocType, create one install.sql that creates all of the tables that the DocType needs. Don't forget to check for the existence of Views.

3. EXPORT THE DOCUMENT TYPES

Use the Migration Tool UI export the four document types (*Timecard*, *TimecardConfig*, *Employees* and *Projects*) along with their documents into your local drive.

To export the document type (including SQL mapping and permissions) and its documents, you'll need to check Documents and Configuration under **Items to export**.



Items to export:

- ☒ Documents
- ☒ Configuration (Permissions, Database Mapping)

4. COPY THE SQL SCRIPTS

Place the SQL scripts in the same local folder where the Migration Tool created the exported mappings and documents. The final and complete migration folder will have the following structure:

```

Samples
  DocTypeName
    mapping.xml
    install.sql
    SampleDocs
  
```

5. PERFORM THE IMPORT

Run the SQL scripts in the new SQL instance. Then use the Migration Tool to import the four document types, along with their documents, into the target instance of DBXL.

OTHER MIGRATION TOOL USES

The Migration has a long list of uses, divided in five tabs. Below are the most important ones.

- **Backup:** You may perform the same steps as in the previous section, without performing the Import. This allows you to have a backup of your document type and your documents. Should you need to recover your data, you can use the Migration Tool to import.
- **Reshredding documents:** In the *Other Operations* tab, the Migration Tool allows you to reshred all the documents for the chosen document type. If you click Reshred All in DAT you might experience timeouts, so the Migration Tool provides an alternative. Reshredding is required when Document Level permissions in DBXL have changed, or then the form template's promoted properties have been modified.
- **Deleting documents:** In the Custom tab there is a scenario that allows you to Delete documents. For details, refer to [this document](#).
- **Upgrading:** The Migration Tool is essential when upgrading from DBXL v2.3 to DBXL v2.4. For details please refer to the document [Upgrade from DBXL V2.3 to DBXL V2.4](#).
- **Transform and migrate:** Starting with version 2.4, Qdabra's Migration Tool provides the ability to migrate all of the documents in one document type to a newer document type, and convert those documents from one XML structure to another in the process. With this feature, you can create a new version of your



form with a different schema, and then upgrade all of your old forms to this new schema with relatively little time and effort. For more details, [click here](#).

OTHER SCENARIOS

The Custom tab contains a list of available scenarios that can be executed using the Migration Tool .

- **Cleanup.xml:** This scenario file contains the following actions.
 - *RemoveDocument:* Deletes a single document from DBXL. This requires specifying a value for the **documentId** parameter.
 - *RemoveCategory:* Removes a category from a document type taxonomy tree. This requires specifying a value for the **categoryName** parameter.
 - *Cleanup:* Deletes all taxonomy, tagging, and QdFlow meta-documents in the DBXL system.
 - *RemoveDocumentsInDocumentType:* Deletes all of the documents in a single DBXL document type. This requires specifying a value for the **documentTypeName** parameter.
- **DeployPictureForm.xml:** This scenario demonstrates the use of compile-on-the-fly plug-ins and bulk deployment. It contains the following action definitions:
 - *PublishPicture:* Demonstrates using a custom plugin to create a new document type and deploy documents to it.
 - *BulkDeploy:* Uses an external plug-in to upload all sample pictures (requires Vista to work as-is)
- **Migrate.xml** and **MigrateCore.xml:** These scenarios allow the export and import documents and document types. These actions are used in the **Import**, **Export**, and **Other Operations** tabs.
- **QdCatBaseTaxonomy.xml** and **DeployQdCatBaseInstances.xml:** These scenarios define actions that work with the qForm solution that ships as part of DBXL. If you would like to use qForm and need assistance, please contact us.
- **ReshredDocuments.xml:**
 - *UploadDocument:* Allows uploading a single document to DBXL from a local disk. Required parameters are **docType** and **filePath**. **name**, **author** and **description** are optional.
 - *ReshredDocuments:* Allows reshredding all documents in a single document type. Requires the **docType** parameter.
 - *ReshredOneDocument:* Allows reshredding a single document. Requires the **docId** parameter.

SUPPORT

If you have questions about the information in this document, please contact us for assistance.

Licensed customers can contact us via Support@Qdabra.com. Alternatively, please use the InfoPathDev.com [Qdabra Product support forums](#) to request help.



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