



Database Accelerator (DBXL) v2.7 Installation Guide

This document will guide you through the installation of DBXL v2.7. Below you will find an outline of this document's contents.

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DBXL V2.7 SERVER EDITION REQUIREMENTS

Please read the following sections before installing Qdabra's Database Accelerator (DBXL) v2.7.

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**. Workgroups are inadequate for the functionality of authentication methods in DBXL. If you still choose to install DBXL on a machine that is not joined to a domain, aspects of DBXL that deal with authentication (such as the Active Directory web service) will not work.

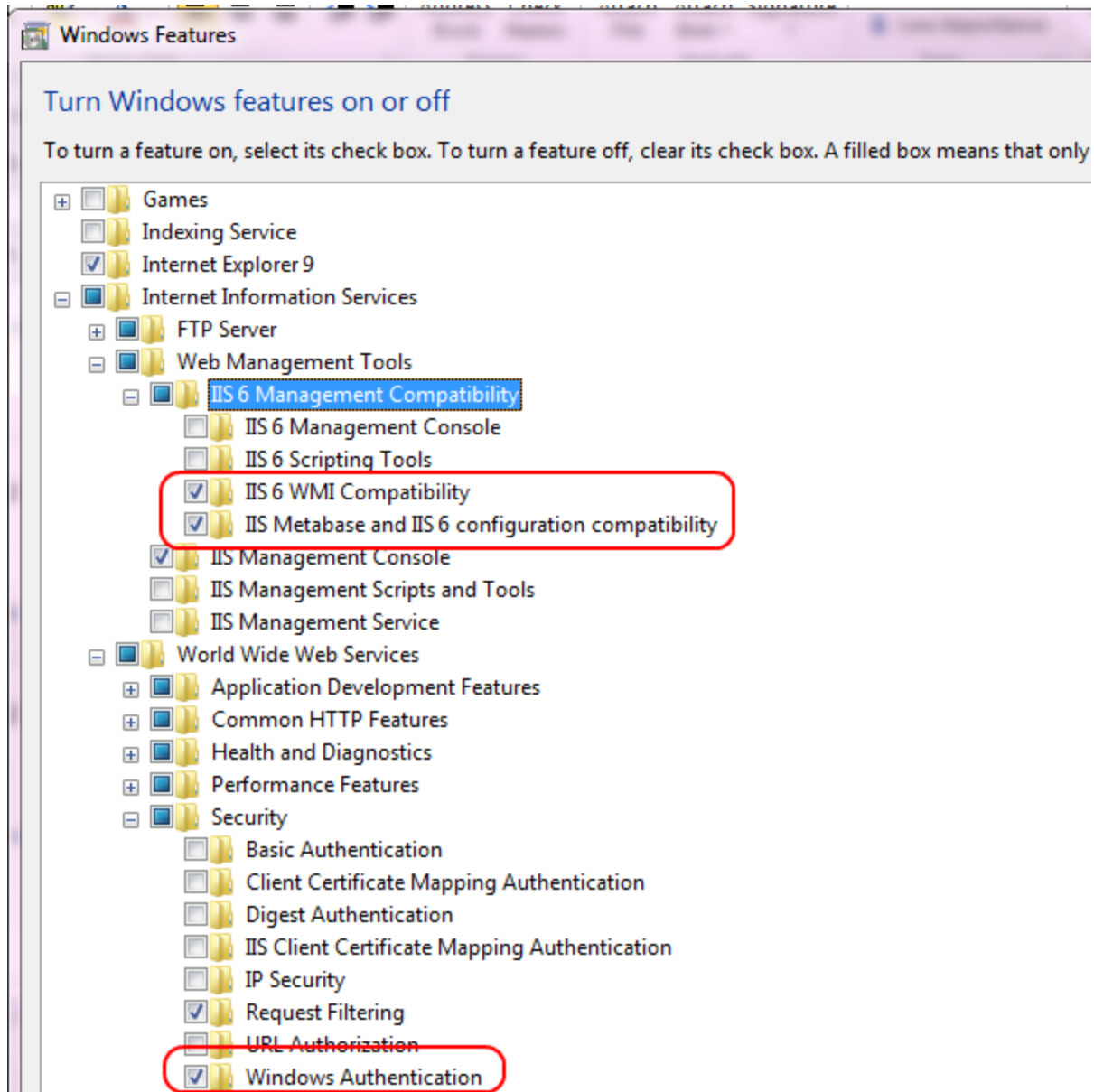
SQL

- DBXL v2.7 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 could install (and log a warning in the eventvwr); in some cases, such as in Windows Vista, the installer will not proceed due to the lack of Full Text Search.
- 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.

IIS

- DBXL requires IIS 5.1 or newer, configured to work with .NET Framework 2.0. For IIS 7.0, all IIS 6.0 compatibility features must be installed.
- The DBXL installer adds the Network Service account (or whatever account the DBXL App pool will be using) 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.
- IMPORTANT Windows XP NOTE: IIS on Windows XP does not support application pools. The local ASPNET account must be granted sysadmin rights in SQL. Windows XP support is limited to local SQL Server instances.
- If you are installing the Server Edition on Windows 7, you must ensure IIS has the following features enabled:





SHAREPOINT

- When using DBXL and SharePoint jointly, install DBXL on the same site that hosts the main SharePoint site (typically SharePoint – 80).
- DBXL v2.7 has been tested with SharePoint 2010 and MOSS 2007, but not SharePoint 2013.

CLIENT MACHINE

Make sure that your client machine (i.e. the machine that will be used to access and use DBXL) meets the following requirements:



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- Operating system: Windows XP, Windows Vista, or Windows 7.
- Permissions: Ability to authenticate with the server where DBXL will be installed.
- Office/InfoPath: Microsoft Office 2003 (InfoPath 2003), Microsoft Office 2007 (InfoPath 2007) or Microsoft Office 2010 (InfoPath 2010).
- Browser: Internet Explorer 7 or higher. Mozilla Firefox and other browsers are not supported.
- Local Intranet: If the site where DBXL is going to be installed is not a part of your Local Intranet, users must add the website to the list of Local Intranet sites, by going to **Internet Options > Security**. This is required to ensure the system is given proper access from your local machine. To do this, follow these steps:
 1. In Internet Explorer, click the **Tools** menu and then click **Internet Options**.
 2. Click the **Security** tab and select the Local intranet icon.
 3. Click the **Sites** button
 4. Make sure all the check boxes are checked and click the **Advanced** button.
 5. Add the site address where DBXL will be installed in the text box (i.e. <http://<servername>>). Then click the Add button.
 6. Click **Close**, and then click **OK** twice to close all the dialogs.

DISABLE LOOPBACK CHECK TO COMPLETE INSTALLATION

On load balanced servers you might encounter an issue installation DBXL; this is an issue encountered for any web service, not just DBXL. The issue is well described in the following link: <http://blog.crsw.com/2008/10/14/unauthorized-401-1-exception-calling-web-services-in-sharepoint/>. Microsoft Support also discusses the issue here: <http://support.microsoft.com/default.aspx?scid=kb;EN-US;896861>. To install DBXL,

- Add the DisableLoopbackCheck registry entry discussed in this Microsoft KB article. Note: you will need to reboot your server before the DisableLoopbackCheck takes effect.
- Be sure to add your load balanced host name for your web farm to the Hosts file on each front end web server. Use the loop-back IP address (127.0.0.1). This will ensure that each web server looks at itself to access the web services preventing any trips back out to the load-balancer – and possibly calling the web service another web server in the farm. This will be much less efficient.

If this problem appeared to be inconsistent (sometimes erroring, sometime successful), this is most likely due having multiple web servers. The call to the web service will be successful if by chance the load balance redirected the call to the same (self) web server to access the web service. It will fail when trying to call across to a different web server.



DBXL V2.7 STANDALONE EDITION REQUIREMENTS

DBXL v2.7 Standalone Edition is meant for solutions that require the use of the Standalone Dashboard. For more information on this scenario, please refer to the documents in the following URL:

http://www.infopathdev.com/files/folders/standalone_dashboard/default.aspx.

The machine where DBXL v2.7 Standalone 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**. Workgroups are inadequate for the functionality of authentication methods in DBXL. If you still choose to install DBXL on a machine that is not joined to a domain, aspects of DBXL that deal with authentication (such as the Active Directory web service) will not work.

SQL

DBXL v2.7 is compatible with, SQL 2005 (including Express edition), or SQL 2008 (including Express edition). It has not been tested with MSDE or SQL Compact. 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 could install (and log a warning in the eventvwr); in some cases, such as in Windows Vista, the installer will not proceed due to the lack of Full Text Search. The user account used to run the DBXL installation must be a sysadmin of the SQL instance.

IIS

IIS is not required for the DBXL v2.7 Standalone edition.



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

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: SERVER EDITION

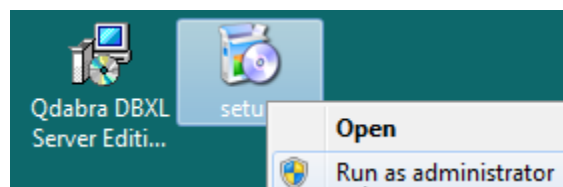
This section contains step-by-step instructions for the installation of Qdabra's Database Accelerator v2.7.

Before installing, close all instances of InfoPath.

If upgrading an existing installation of DBXL please refer to [this document](#) for more information.

START THE INSTALLER

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



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

INSTALLATION ADDRESS

4. In the **Installation Address** screen, you will find a dropdown listing all sites. Select the desired **Site** for installation from the dropdown.
 - When using DBXL and SharePoint jointly, install DBXL on the same site that hosts the main SharePoint site (typically SharePoint – 80).
 - 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.
5. The **Virtual Directory** is set to QdabraWebService by default, but this can be changed if desired.
6. 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.

7. 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.



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- 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 SharePoint site is using an alias, you will need to specify it in the host header field during installation.
- When installing DBXL v2.7 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.

The screenshot shows the 'Site' configuration tab with the following details:

- Default Web Site:** Site Url: http://ERNESTO:80
- Binding Detail:**
 - Host name: ERNESTO (Example: www.contoso.com or marketing.contoso.com)
 - Port: 80
 - SSL:
 - IP Address: (empty field)
- Resulting URL:** The url for the DBXL webservice will be as shown below: http://ERNESTO:80/QdabraWebService/Documents

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

LOG ON TAB

The **Log On** tab allows you to indicate the account which DBXL will run as. Qdabra recommends that DBXL run under the same identity as the SharePoint app pool. This means that if the SharePoint – 80 app pool is running as Network Service, you may select Predefined on this screen. However, if the SharePoint app pool is running under a different identity, you will need to select Predefined and provide those credentials.

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



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Site Log On Document Security Active Directory Service SQL Server

The Qdabra™ Database Accelerator will run under these account credentials. If you select **Configurable**, you must provide an **Account** and **Password**. 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.

Predefined

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

Configurable

Account:

Password:

10. 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.

Site Log On Document Security Active Directory Service SQL Server

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

Writer Group

Reader Group

Browser Group When global permissions are enabled, users in these groups will have the given access to all documents stored in DBXL. For fine grained permissions, uncheck to disable global permissions and set permissions on individual document types.



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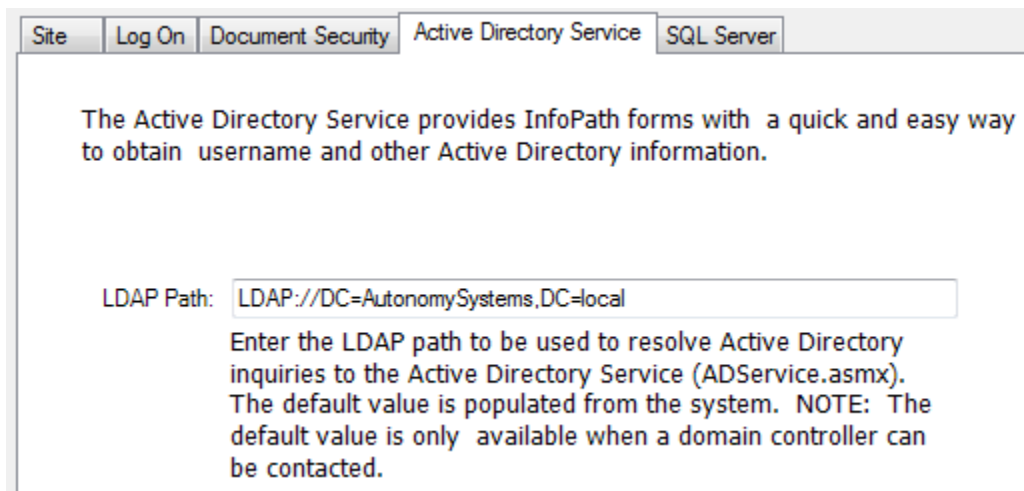
This screen has other options, such as the **Enable Global User Permissions** checkbox. If you uncheck **Enable Global User Permissions** checkbox, you will have to set permissions on every individual document type, since the Global Permissions will not be enforced. Disabling global permissions does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

11. 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.

12. 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.

13. 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.

14. 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.
15. 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.

16. 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. **Qdabra recommends accepting these default database names.**

This tab contains one more option, **Use existing databases**. You only need to use this if you had a previous installation (such as DBXL v2.5 or DBXL v2.6) and want to reuse the same databases.

The screenshot shows the 'SQL Server' configuration tab. It includes the following fields and options:

- Server name:** (LOCAL)\SQLEXPRESS
- Authentication:** Windows Authentication
- User name:** (empty text box)
- Password:** (empty text box)
- Confirm password:** (empty text box)
- Document Database:** QdabraDBXL
- Utility Database:** QdabraUtility
- Use existing databases

FINISH THE INSTALLER

17. 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).



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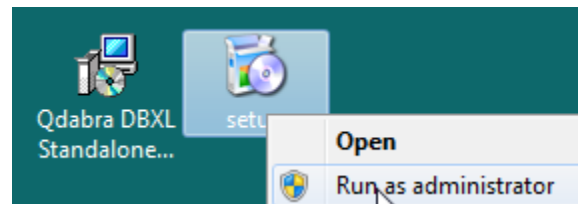
INSTALLATION STEP BY STEP: STANDALONE EDITION

IMPORTANT: BEFORE YOU START

- Before installing, close all instances of InfoPath.
- In order to install the DBXL v2.7 Standalone Edition on Windows XP, you will first need to install the msvc90.dll redistribution.
- The primary issue seen with DBXL Client installs is related to folder permissions. First, grant the Network Service account permissions to the %windir%\TEMP folder. Some situations require a restart after granting permissions to the Network Service account. The key indicator that the TEMP folder permissions is the problem is when you see an eventlog error adding the trial license. **The DBXL installer will attempt to automatically add these permissions, if they are not present. In that scenario, a restart will be required, but the DBXL installer will continue after the restart.**
- Before uninstalling the DBXL Client (for example, to reinstall), you should STOP the service. This should prevent the error that the service already exists when reinstalling.
- If upgrading an existing installation of DBXL please refer to [this document](#) for more information.

START THE INSTALLER

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



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

SITE

4. The Site tab allows you to select the port number that will be used for DBXL Standalone Edition.



Site | Document Security | Active Directory Service | SQL Server

Binding Detail

Host name: localhost
Example: www.contoso.com or marketing.contoso.com

Port: 8000

The url for the DBXL webservice will be as shown below:
http://localhost:8000/QdabraWebService/Documents

5. 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. The members 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, as seen in the screenshot below, make sure that you (the user installing) have been added to the group.

Site | Document Security | Active Directory Service | SQL Server

DBXL Admin: ERNESTO\DbxlAdmins

Enable Global User Permissions

Admin Group: ERNESTO\DbxlAdmins

Writer Group:

Reader Group:

Browser Group: NT AUTHORITY\Authenticated User

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

When global permissions are enabled, users in these groups will have the given access to all documents stored in DBXL. For fine grained permissions, uncheck to disable global permissions and set permissions on individual document types.

This screen has other options, such as the **Set Global User Permissions** checkbox. If you uncheck **Set Global User Permissions** checkbox, you will have to set permissions on every individual document type, since the Global



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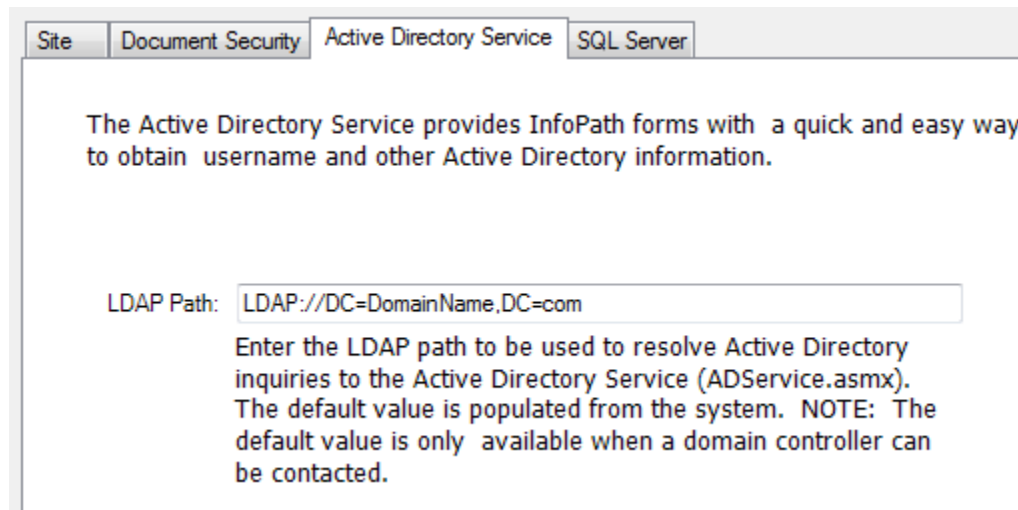
Permissions will not be enforced. Disabling global permissions does not make DBXL “wide-open”. On the contrary, it restricts access to DBXL.

6. 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.

7. 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**).



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

SQL SERVER TAB

In the **SQL Server** tab, indicate the database where DBXL will store all documents.

9. 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.
10. 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 requires sysadmin rights. Once



the database is created, the user rights can be reduced to db_datareader and db_datawriter roles. This is a manual step that you can do after installation.

11. 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. **Qdabra recommends accepting these default database names.**

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

The screenshot shows the 'SQL Server' configuration window. It includes a tabbed interface with 'SQL Server' selected. Below the tabs are several configuration options:

- Server name:** A dropdown menu showing '(LOCAL)\SQLEXPRESS'.
- Authentication:** A dropdown menu showing 'Windows Authentication'.
- User name:** An empty text input field.
- Password:** An empty text input field.
- Confirm password:** An empty text input field.
- Document Database:** A text input field containing 'QdabraDBXL'.
- Utility Database:** A text input field containing 'QdabraUtility'.
- Use existing databases:** A checkbox that is currently unchecked.

FINISH THE INSTALLER

12. 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).



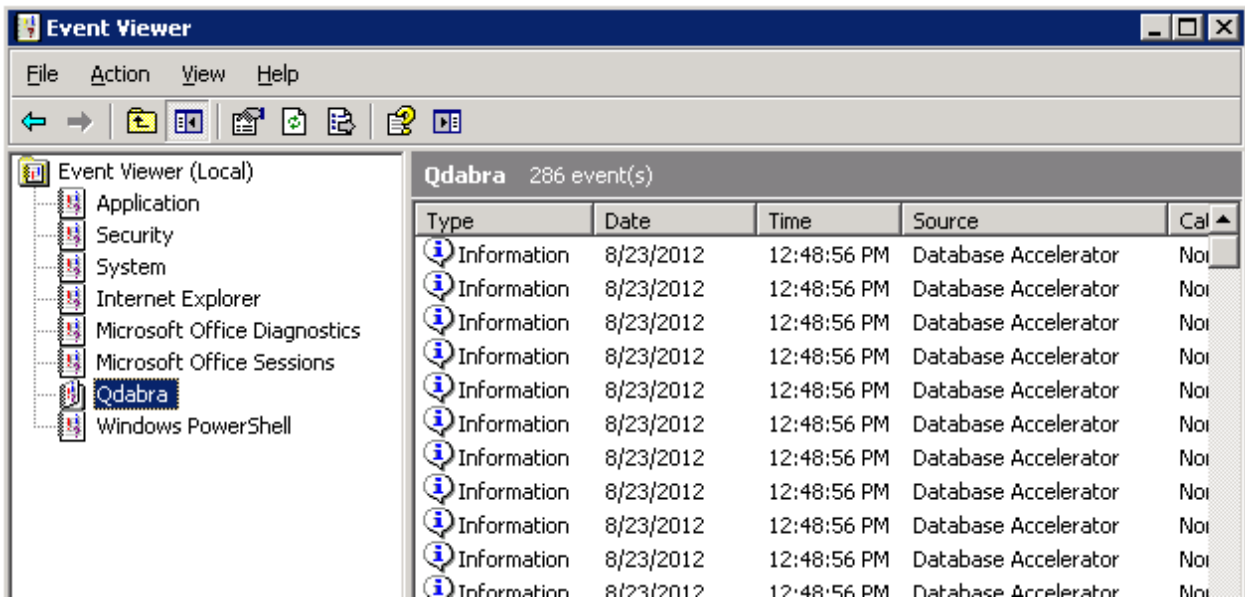
POST INSTALLATION

VERIFY YOUR INSTALLATION

After installing Qdabra’s Database Accelerator v2.7, there are a few quick tasks you can perform to verify that the installation completed successfully.

EVENT VIEWER

After installing DBXL, please check the machine’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](#).



DBXL ADMINISTRATION TOOL

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. DAT will open.

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 listed:



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System Document Types			
Name	Descriptions	Docs	Edit
DAT		0	
QdAttachment		0	
QdCategory		0	
QdDocumentIndexFields		22	
QdDocumentType		23	
QdDocumentTypePermissions		22	
QdDocumentTypeProperties		22	
QdDomain		0	
QdEmailFlow		0	
QdFile		0	
QdHierarchy		0	
QdImage		0	
QdMapping		22	
QdNodeNamespaces		22	
QdNotification		0	
QdRatings		0	
QdRefIdInfo		29	
QdSharePointListMaps		22	
QdStandaloneDashboard		0	
QdStandaloneLog		0	
QdTags		0	
QdUser		0	
qFormTemplate		0	

LICENSING

DBXL v2.7 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, your installation has run into issues. Please see the **Support** section below.

GETTING STARTED WITH DBXL

DBXL v2.7 comes with a Getting Started document, which will allow you to learn the basics of DBXL, step by step.

Qdabra also offers DBXL training! The [videos are available here](#) and the [training modules are available here](#).

Visit the DBXL v2.7 Product page on Qdabra.com to find a list of [all available documents](#).

TROUBLESHOOTING

If you encounter issues with your DBXL v2.7 installation, the Release Notes document provides a list of issues, solutions and workarounds.

CLEAN UP AN EXISTING INSTALLATION

If you encountered issues during an installation of DBXL v2.7, you might need to perform some cleanup. 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.



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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 encounter issues with your DBXL v2.7 installation, the Release Notes document provides a list of issues, solutions and workarounds. If you have questions about the information in this document, please contact us for assistance.

Licensed customers contact us via support@qdabra.com.

Alternatively, please use the [InfoPathDev.com Qdabra Product support forums](http://InfoPathDev.com/Qdabra/Product/support/forums) to request help.



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