



**Q-Pulse Document Retrieval Service
User Manual**

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Introduction to the Q-Pulse Document Retrieval Service

The Q-Pulse Document Retrieval Service allows you to retrieve the attachment of a particular revision of a Document record when you don't have access to a Q-Pulse client.

NB Multiple database environments are not currently supported by the Q-Pulse Document Retrieval Service.

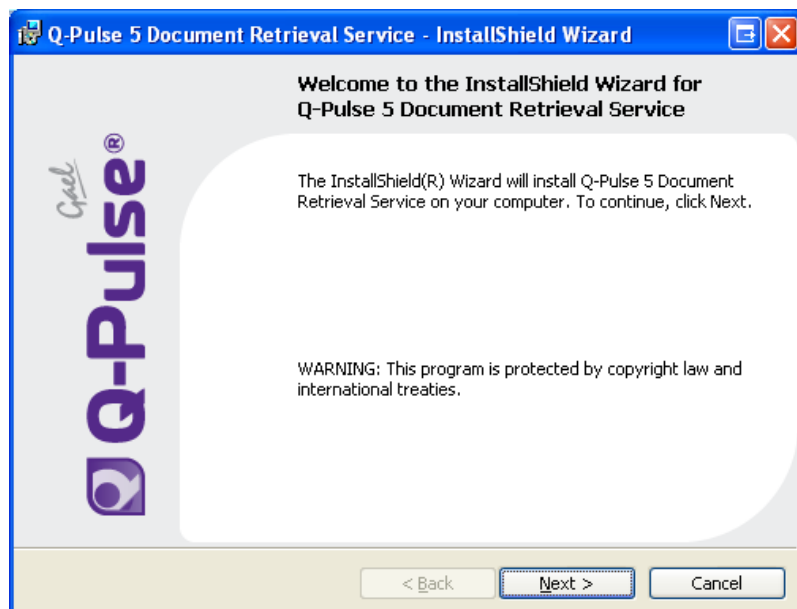
Installation Requirements

Q-Pulse Server version 5.800

Internet Information Services (IIS) version 6.0 or better

Installation Procedure

1. Run the Document Retrieval Service installation program and follow the instructions to complete the installation.



2. Some additional configuration is now required. The operating system used by your server will determine how the configuration will be accomplished. Follow the appropriate steps, listed in the subsequent 'Configuration on Windows Server 2003' or 'Configuration on Windows Server 2008' sections, for the operating system your server uses.

Configuration on Windows Server 2003

Q-Pulse server configured to use Q-Pulse authentication or Windows authentication (prompted):

1. Navigate to Control Panel > Administrative Tools > Internet Information Services (IIS) Manager
2. Locate the *QPulseDocumentService* folder from the left hand side of the window by expanding:
 - a. [Server] > Web Sites > Default Web Site
3. Right-click on *QPulseDocumentService* folder and select properties
4. Select the *Directory Security* tab and click the Edit Button beside '*Authentication and Access Control*'
5. 'Check' the *Enable Anonymous access* checkbox
 - a. Specify a user who has permission to access the *QPulseDocumentService* folder
6. Uncheck the *Integrated windows authentication* checkbox and click 'OK'

Q-Pulse server configured to use Windows authentication (unprompted):

1. Navigate to Control Panel > Administrative Tools > Internet Information Services (IIS) Manager
2. Locate the *QPulseDocumentService* folder from the left hand side of the window by expanding:
 - a. [Server] > Web Sites > Default Web Site
3. Right-click on *QPulseDocumentService* folder and select properties
4. Select the *Directory Security* tab and click the Edit Button
5. Uncheck the *Anonymous access* checkbox
6. Check the *Integrated windows authentication* checkbox and click 'OK'

Configuring Q-Pulse Document Retrieval Service to automatically log in using a pre-defined Q-Pulse username and password:

1. Navigate to Control Panel > Administrative Tools > Internet Information Services (IIS) Manager
2. Locate the *QPulseDocumentService* folder from the left hand side of the window by expanding:
 - a. [Server] > Web Sites > Default Web Site
3. Right-click on *QPulseDocumentService* folder and select properties
4. Select the *ASP.Net* tab and click the Edit Configuration Button
5. Select the General tab
6. In the Application Settings list add or edit a key named 'AnonymousUser' and enter the Q-Pulse user name to be used for automatic login
7. In the Application Settings list add or edit a key named 'AnonymousPassword' and enter the corresponding Q-Pulse password for 'AnonymousUser' account
8. Click 'OK' to exit Configuration dialog
9. Click 'OK' to exit Properties dialog.

Configuration on Windows Server 2008

Q-Pulse server configured to use Windows authentication (prompted) or Q-Pulse authentication:

1. Navigate to Control Panel > Administrative Tools > Internet Information Services (IIS) Manager
2. Locate the QPulseDocumentService entry under the 'Sites' virtual folder in the 'Connections' pane on the left
3. Open the 'Authentication' feature
4. Ensure Anonymous authentication is enabled and that all other authentication methods are disabled

Q-Pulse server configured to use Windows authentication (unprompted):

The following procedure requires IIS7 Windows Authentication to be installed.

1. Navigate to Control Panel > Administrative Tools > Internet Information Services (IIS) Manager
2. Locate the QPulseDocumentService entry under the 'Sites' virtual folder in the 'Connections' pane on the left
3. Open the 'Authentication' feature
4. Ensure ASP.NET Impersonation and Windows Authentication are enabled and that all other authentication methods are disabled

Configuring Q-Pulse Document Retrieval Service to automatically log in using a pre-defined Q-Pulse username and password

1. Navigate to Control Panel > Administrative Tools > Internet Information Services (IIS) Manager
2. Locate the QPulseDocumentService entry under the 'Sites' virtual folder in the 'Connections' pane on the left
3. Open the 'Application Settings' feature
4. In the Application Settings list add or edit a field named 'AnonymousUser' and enter the Q-Pulse user name to be used for automatic login
5. In the Application Settings list add or edit a field named 'AnonymousPassword' and enter the corresponding Q-Pulse password for 'AnonymousUser' account

N.B A pre-defined Q-Pulse username and password can be used in the DRS when either Q-Pulse authentication or Windows Authentication has been set in the Q-Pulse Administration module.

How to Retrieve a Document Attachment

You can retrieve a document attachment in the following ways:

1. By searching active or draft documents and choosing one of the results
2. By specifying a particular active or draft document
3. By searching for a particular document revision
4. By specifying a particular document revision

NB The Document Retrieval Service requires the user to authenticate with Q-Pulse and will therefore terminate any other existing Q-Pulse session.

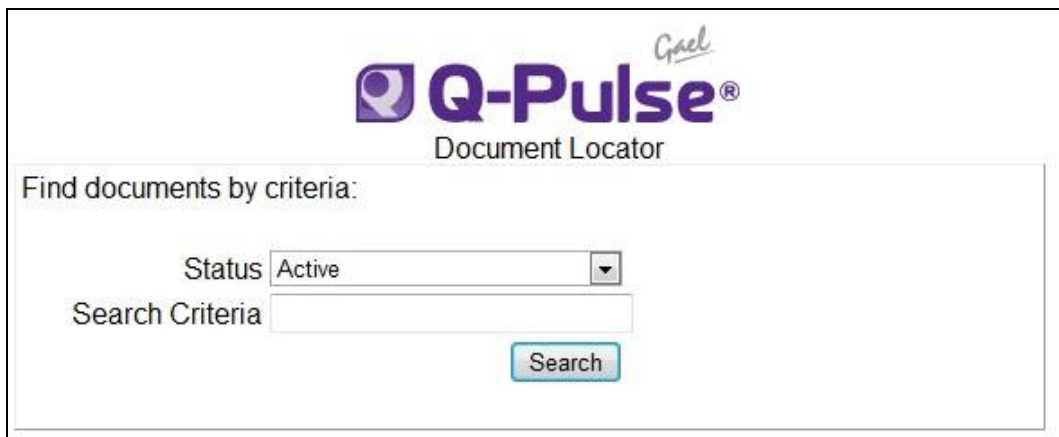
Searching Active or Draft Documents

To search for a document attachment:

1. Go to the following URL:
<http://<DocumentRetrievalServerName>/QPulseDocumentService/default.aspx>

Depending on how your Q-Pulse authentication is set up, you will either be presented with a login screen or a page with two search forms.

2. In the 'Find documents by criteria' form enter the search criteria for the document required and click 'Search'. Search criteria will be matched against the document number, title and keyword fields using a contains operator.



The screenshot shows the 'Q-Pulse Document Locator' interface. At the top, there is a logo with a stylized 'Q' and the text 'Q-Pulse' and 'Gael'. Below the logo, the text 'Document Locator' is displayed. The main section is titled 'Find documents by criteria:'. It contains a 'Status' dropdown menu with 'Active' selected, a 'Search Criteria' text input field, and a 'Search' button.

Figure 1: Search form

- Documents matching the search criteria will be displayed in a list where documents containing 1 or more attachments will be displayed in the form of a hyperlink.

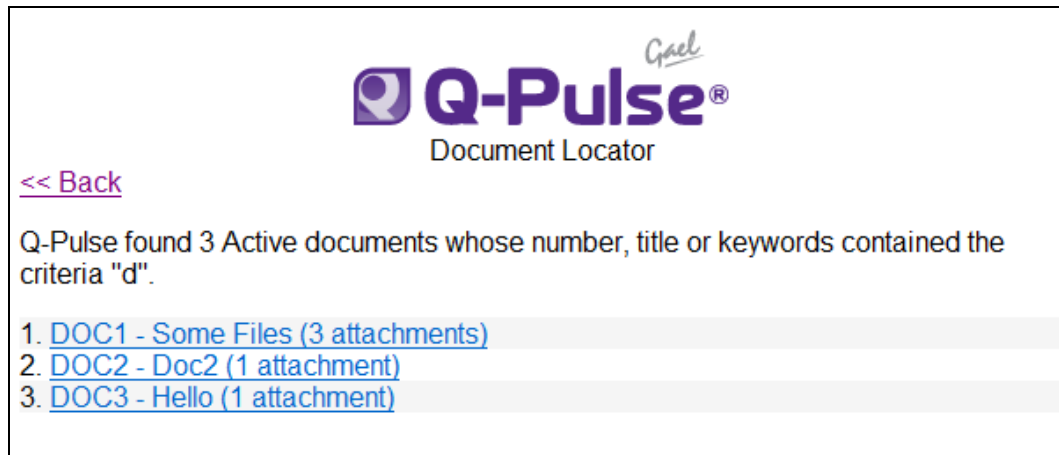


Figure 2: Search results

- Clicking one of these hyperlinks will either launch the default attachment or return a list of records to choose from, depending on how many attachments are present for that record and whether an index file has been set.

Specifying a particular Active or Draft Document

The Document Retrieval Service provides a URL to retrieve the default attachment of the latest revision of an active or draft document. The URL is constructed in the following format:

`http://<DocumentRetrievalServerName>/QPulseDocumentService/Documents.svc/documents/<status>/attachment?number=<documentNumber>`

- <DocumentRetrievalServerName> is the name/IP of the server where the Document Retrieval Service has been installed
- <status> is the status of the Document (e.g. Active or Draft)
- <documentNumber> is the Document number

For example, the following URL would return the default attachment for the latest revision of the active document 'DOC1':

`http://10.0.10.101/QPulseDocumentService/Documents.svc/documents/Active/attachment?number=DOC1`

In the event that a Document record has multiple attachments and has no Index file set (i.e. default attachment) it is possible to specify which attachment to return using a URL constructed in the following format:

`http://<DocumentRetrievalServerName>/QPulseDocumentService/Documents.svc/documents/<status>/attachment?number=<documentNumber>&attID=<attachmentID>`

- < attachmentID > is the ID of the attachment to return

Searching for a particular Document Revision

To locate a particular document revision:

1. Go to the following URL:
`http://<DocumentRetrievalServerName>/QPulseDocumentService/default.aspx`

Depending on how your Q-Pulse authentication is set up, you will either be presented with a login screen or a page with two search forms.

2. In the 'Locate a particular document revision' form enter the required document revision and document number and click 'Locate Revision'.

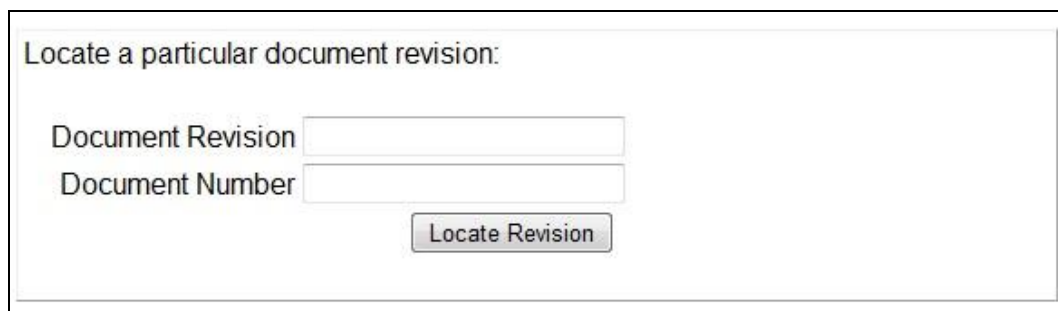


Figure 3: Locate a particular Document Revision form

3. If a document with a matching document revision and document number is found a page will list each of the documents attachments as a list of hyperlinks to each attachment.



[<< Back](#)

Q-Pulse found revision 1 of document "DOC1" with 3 attachments.

1. [another.doc](#)
2. [test.doc](#)
3. [test2.doc](#)

Figure 4: Attachment results

Specifying a particular Document Revision

The Document Retrieval Service provides a URL to retrieve the default attachment of a particular document revision. The URL must be constructed in the following format:

`http://<DocumentRetrievalServerName>/QPulseDocumentService/Documents.svc/documents/revision/attachment?number=<documentNumber>&revision=<documentRevision>`

- `<DocumentRetrievalServerName>` is the name/IP of the server where the Document Retrieval Service has been installed
- `<documentNumber>` is the Document number
- `<documentRevision>` is the Document revision

For example, the following URL would return the attachment for revision '1' of the document 'DOC1':

`http://10.0.10.101/QPulseDocumentService/Documents.svc/documents/revision/attachment?number=DOC1&revision=1`

In the event that a Document record has multiple attachments and has no index file (i.e. default attachment) it is possible to specify which attachment to return using a URL constructed in the following format:

`http://<DocumentRetrievalServerName>/QPulseDocumentService/Documents.svc/documents/revision/attachment?number=<documentNumber>&revision=<documentRevision>&attID=<attachmentID>`

- `< attachmentID >` is the ID of the attachment to return

Documents with Multiple Attachments

If you have multiple attachments stored against a Document record and no index file set (i.e. default attachment), you will be shown a list of all the attachments (fig. 2) to choose from. If an index file is set, that file will be opened automatically regardless of how many other attachments exist for that document.

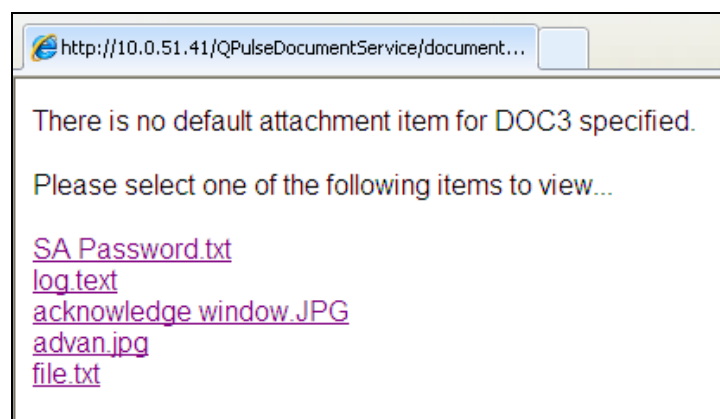


Figure 5: Document with multiple attachments and no index

Uninstalling the Software

To remove the Q-Pulse Document Retrieval Service from your system, navigate to 'Add or Remove Programs' and remove the Q-Pulse 5 Document Retrieval Service' entry. Alternatively, re-running the installation program provides a 'Remove' option allowing the software to be uninstalled.

Known Issues

Multiple Database Environments

The Q-Pulse Document Retrieval Service currently only supports single database environments. If in a multiple database environment, the database to be used can be specified.

In order to specify which database should be used:

1. Open the *web.config* file for the Q-Pulse Document Service available in 'C:\inetpub\wwwroot\QPulseDocumentService' by default
2. Change the database display name specified in file by editing the following entry:
 - a. `<add key="Database" value="<Database Alias>"/>`

Replace <Database Alias> with the display name of the database to be used as specified in the DBConnections.xml file found in your Q-Pulse 5 Server installation directory.

Unhandled Exception when Attempting to Login

If the User Lockout feature is enabled in Q-Pulse then an exception will be raised if the credentials entered on the final attempt to authenticate are incorrect.

Unhandled Exception when Attempting to Access the Document Retrieval Service

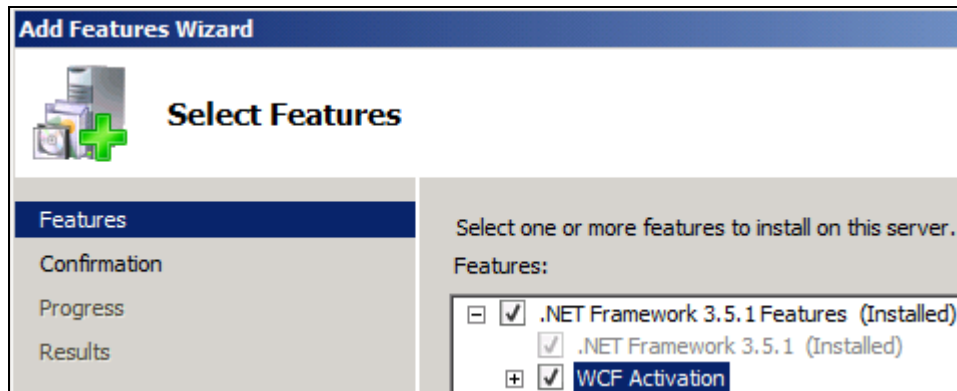
Encountered if your Q-Pulse Licence has expired or is set to expire within the next 14 days.

Blank Page returned when Opening Document Attachment

This can occur when a user who does not have the required permissions attempts to access the attachment of a draft document.

Error Returned When Trying to Open Document Attachment

This can happen when the Windows Communication Foundation feature has not been installed on the server the DRS is installed on. To resolve this go into Server Manager and select Add Features, then select the Windows Communication Foundation:





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