



Document Retrieval Service

User Manual

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Introduction to DRS

The Q-Pulse Document Retrieval Service (DRS) is an optional add-on that can be installed on your server in order to gain immediate access to your document attachments. It 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.

The benefits of using the DRS include:

- Launching attachments without needing to log in to Q-Pulse
- Linking directly to embedded documents from within other documents
- Access documents from within your intranet/sharepoint pages
- Always linking to the current active revision of a document

Although designed to access a single database only, the DRS can be configured to access different databases. In order to achieve this, an instance of the Q-Pulse Document Retrieval Service must be installed for each database that is required to be accessed by the service.



Additional Assistance Available!

Additional information on how to use the Document Retrieval Service is available in the Articles section of the Customer Portal. To view and rate articles please visit the Gael Customer Portal at <http://customer.gaelquality.com/>.

For additional details on how to get started with DRS please visit the Article [Getting Started with DRS](#).

Installing Document Retrieval Service

Minimum Requirements

The Document Retrieval Service is version specific, meaning you will need to ensure the version of DRS installed matches the version of Q-Pulse installed.

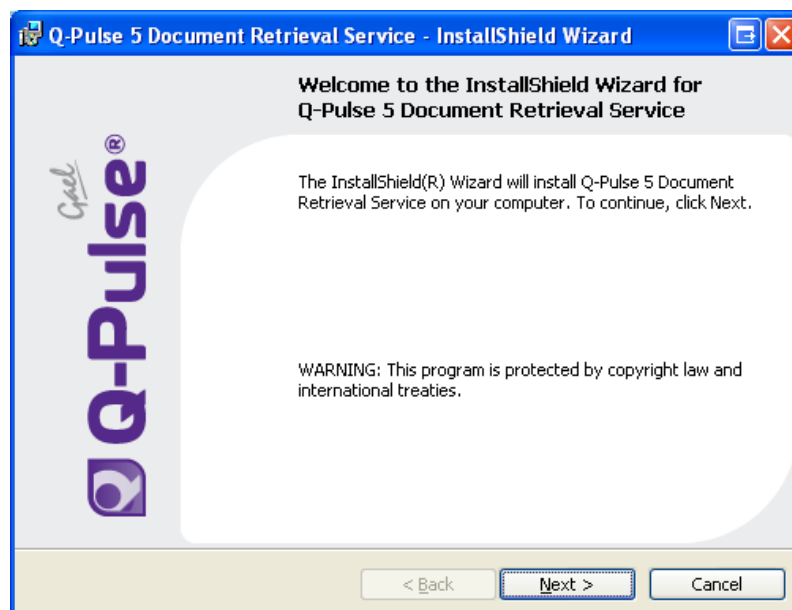
In order to install the DRS, you will require:

- Q-Pulse Server version 5.70 or higher
- Internet Information Services (IIS) version 7.0 or later

You can download the latest version of the DRS from the [DRS Download Centre](#) on the Gael Customer Portal.

Installation Procedure

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



2. When prompted, enter the address of your Q-Pulse application server.
3. Follow the on-screen instructions to complete the installation.

Configuring Authentication

Configuration on IIS 7 (or higher)

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

NB If the display name for the Q-Pulse database is not "Default" then the Value for the "Database" parameter should be changed within the Application Settings list to match the display name of the Q-Pulse database that is to be accessed from DRS



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For additional details on how to get started with DRS please visit the Article [How to Set-up and Configure the DRS](#).

Using Document Retrieval Service

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>

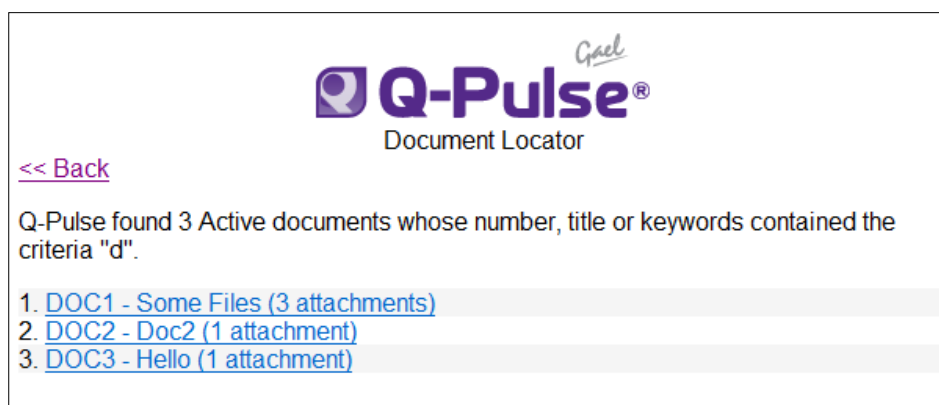
Depending on how your Q-Pulse authentication is set up, you will either be presented with a login screen or a page with two search forms.

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 the Q-Pulse logo with the word 'Gael' written in a script font above it. Below the logo, the text 'Document Locator' is displayed. Underneath, a box contains the heading 'Find documents by criteria:'. Inside this box, there are two input fields: 'Status' with a dropdown menu currently showing 'Active', and 'Search Criteria' with a text input field. To the right of the 'Search Criteria' field is a blue 'Search' button.

3. 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.



4. 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.



Additional Assistance Available!

Additional information on how to use the Document Retrieval Service is available in the Articles section of the Customer Portal. To view and rate articles please visit the Customer Portal at <http://customer.gaelquality.com/>.

For additional details on how to get started with DRS please visit the Article [How to Use DRS](#).

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

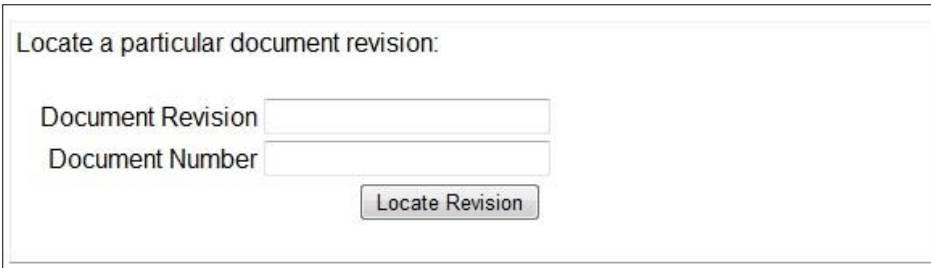
Searching for a particular Document Revision

To locate a particular document revision:

1. Go to the following URL:
2. <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.

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

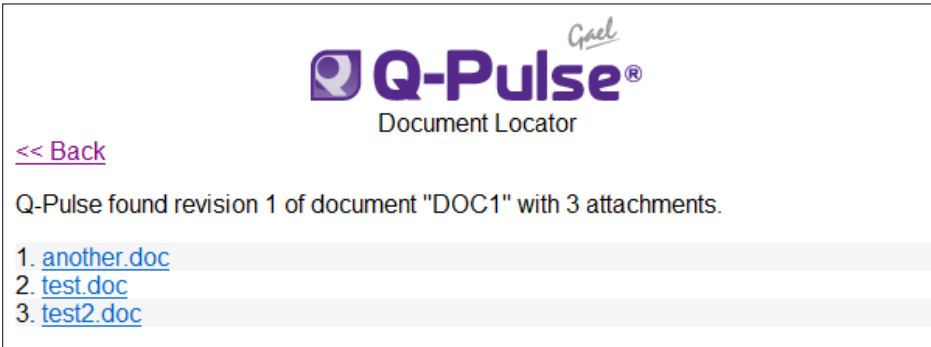



Locate a particular document revision:

Document Revision

Document Number

4. 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.



 **Q-Pulse**®
Document Locator

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

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

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`

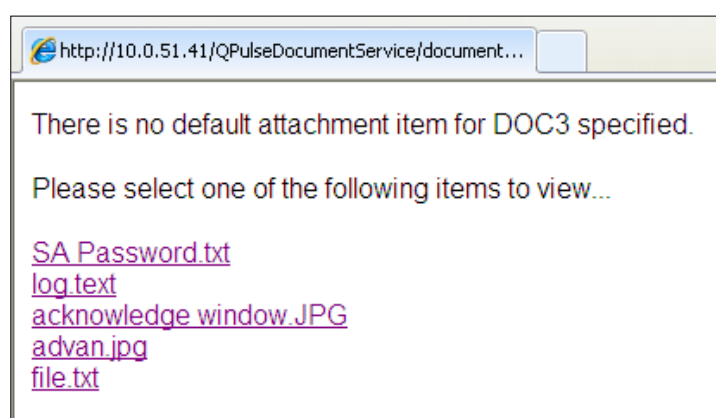
In the event that a Document record has multiple attachments and has no index file (i.e. default attachment) it is possible to specify which attachment to return using a URL constructed in the following format:

`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.



Uninstalling the DRS

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

Troubleshooting

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 Server installation directory.



Additional Assistance Available!

Additional information on how to configure the Document Retrieval Service is available in the Articles section of the Customer Portal. To view and rate articles please visit the Customer Portal at <http://customer.gaelquality.com/>.

For additional details on how to set-up the DRS to connect to multiple databases please visit the Article [How to Use DRS to Access Multiple Databases](#).

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:

