Automation Services 8.1
ReadMe

Contents

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Automation Services makes it easy to configure and use sophisticated workflows with
Quark Publishing System® (QPS®).

Additional documentation

You can download additional documentation for Automation Services from the same FTP site where you downloaded the software. Automation Services documentation is also available at *http://support.quark.com/documentation/Publishing_System/8.html*.

System requirements

The system requirements for Automation Services are as follows.

Server requirements

Software

- Microsoft® Windows® Server 2003, Microsoft Windows Server 2008, or Microsoft Windows Server 2008 R2 (Standard Edition or Enterprise Edition; 32-bit or 64-bit)

- Microsoft Windows XP, Microsoft Windows Vista®, or Microsoft Windows 7 (not recommended — see "*Installing on Windows XP*" and "*Installing on Windows 7*")

- .NET Framework 3.5 SP1

- Microsoft Internet Information Server 6 or later with IIS 6 metabase compatibility, IIS 6 management compatibility, and the ASP.Net component

- Drupal® 6.x (optional)

Hardware

- 4GB total RAM (Quark® recommends allocating as much RAM as possible for QPS Server. However, you cannot allocate more than approximately 1.6GB on Windows.)

- 1GB hard disk space

- TCP/IP network (Gigabit Ethernet recommended)

➡ Quark does not recommend using low-end desktop computers and laptops as server computers.

➡ The use of Automation Services with a proxy server is not currently supported.

Client requirements

Software

- QPS 8.1.4.0

- Microsoft Windows XP Professional Edition, Windows Vista Business or Ultimate, or Windows 7 Business or Ultimate

- .NET Framework 3.5 SP1

- Altova® MapForce® 2010 Enterprise Edition and integration package (one license included)

Hardware

- 1GB total RAM

- 500MB hard disk space for program files

- TCP/IP network

Installing

For information about installing Automation Services, see the following topics.

Installing Drupal for Automation Services

Automation Services does not require Drupal, but if you want to use Automation Services with Drupal, you should install Drupal before you install Automation Services.

➡ If you have already installed Drupal, see "*Configuring Drupal for Automation Services*."

To install Drupal for Automation Services:

1 Install Apache™ HTTP Server 2.2.x and PHP 5.2.0 and configure them to work together using the instructions at *http://drupal.org/node/264*. Verify that Apache can serve your PHP pages.

2 Install MySQL® 5.0 and configure it to work with Apache and PHP using the instructions at *http://www.bicubica.com/apache-php-mysql/index.php*. Verify that your PHP pages can communicate with MySQL.

3 Make sure the target computer meets the system requirements described at *http://drupal.org/requirements*.

4 Download Drupal 6.x from *http://drupal.org/*, decompress the Drupal archive, and install Drupal using the instructions in the file "INSTALL.mysql.txt" file.

5 Create a database for Drupal using a tool such as phpmyadmin (available at *http://www.phpmyadmin.net*).

Configuring Drupal for Automation Services

This topic explains how to configure an installed instance of Drupal for Automation Services.

➡ If you are using a hosted Drupal instance, share these instructions with the Drupal host organization so they can configure Drupal to work with Automation Services.

To configure Drupal for Automation Services:

1 Enable the Clean URLs feature in Drupal.

   a) To enable the mod_rewrite module in Apache, uncomment the following line in the "httpd.conf" file:

       `LoadModule rewrite_module modules/mod_rewrite.so`

   b) Also in the "httpd.conf" file, apply the `Options Indexes FollowSymLinks` and `AllowOverride All` to the Apache root and "htdocs" directories.

   c) Restart Apache.

   d) Set the Drupal **Clean URLs** option (**Administer > By Task > Site Configuration > Clean URLs**) to **Enabled**.

2 Enable the Drupal **Path** and **PHP Filter** modules (**Administer > Site Building > Modules**).

3 Increase the upload limit in PHP to 20MB or more. For more information, see *http://drupal.org/node/97193*.

4 If necessary, increase the memory available to PHP. For more information, see *http://drupal.org/node/29268*.

5 In the "php.ini" file, add `extension=php_zip.dll` and set `zlib.output_compression = On`.

6 In Drupal, go to **Administer > By Task > Site Configuration > Input Formats** and set the default to **Full HTML**.

7 Create a content uploader page in Drupal.

   a) Create a new page by clicking **Create Content** in the sidebar and then clicking **Page**.

   b) Set the **Title** of the page to "Quark Automation Services Content Uploader".

   c) Under **Menu settings**, choose the last (largest) number from the **Weight** drop-down menu.

   d) The Automation Services installer creates a folder named "For Drupal." In this folder is a file named "Drupal Content Uploader.php." Copy the contents of this file into the **Body** field.

   e) Under **Input format**, click **Php Code**.

   f) Under **Revision information**, check **Create new revision** and enter `Content Uploader for Quark Automation Services` in the **Log message** field.

   g) Under **Comment settings**, click **Disabled**.

   h) In the **URL path settings** field, enter `quark/automationservices/uploadcontent`.

   i) Under **Publishing options**, click **Published**.

8 Test the installation.

a) In a Web browser, go to `http://[server]:[port]/[path to drupal]/quark/automationservices/uploadcontent? operation=test&user_name=[user name]&password=[password].`

b) Open "ContentUploaderTest.html" in a text editor, change the `<form>` element's `action` attribute to `http://[server]:[port]/[path-to-drupal]/quark/automationservices/uploadcontent`, then save and close the file.

c) Open "ContentUploaderTest.html" in a Web browser. An upload form should display.

d) Enter your Drupal user name and password.

e) Choose **Upload Data** from the **Operation** drop-down menu.

f) Make sure **Content Path** is set to "/".

g) In the **Content Images** field, choose a .zip file that contains an image file (for example, "image.jpg").

h) In the **Content** field, change the URL so that the name of the picture is at the end of the `<img src="` path (for example, `<img src="/quark/automationservices/images/image.jpg" />`).

i) Click **Send to Drupal**.

j) Verify that the picture file was uploaded to the "images" folder in your "htdocs" directory.

Installing server components

To install the server components of Automation Services on Windows Server or Windows Vista:

1 Make sure QPS Connect Client 8.1 is installed on a computer on the same network as the computer where you want to run Automation Services.

2 Make sure IIS is up and running.

3 Double-click the "Automation Services.exe" icon in the "Server" folder and follow the instructions on the screen.

➡ If you receive a "FileLoadException" error when you attempt to start the server component on Windows Server 2008, it may be the result of a known Microsoft issue. For more information, see "Fixing the FileLoadException Error" at *http://msdn.microsoft.com/en-us/library/ms732012.aspx*.

Installing on Windows XP

On Windows XP, the Automation Services server component works with the following limitations:

- You can log on to the Automation Services server component only from an instance of QPS Connect Client that is running on the same computer as the server component.

- When saving output to the file system, you can save the output only to a UNC Path on the same computer as the server component.

To install the client components of Automation Services on Windows XP:

1 Make sure QPS Connect Client 8.1 is installed.

2 Make sure IIS is up and running.

3 Double-click the "Automation Services.exe" icon in the "Client" folder and follow the instructions on the screen.

4 When the **Server Information** screen displays, enter the domain name or IP address and the port number of the computer where Automation Services server component will run.

5 Give the `[server computer name]\ASPNET` object **Full Control** privileges for the "Automation Services for QPS - Server" folder.

6 Reset IIS from the command prompt.

Installing on Windows 7

On Windows 7, the Automation Services server component works with the following limitations:

- You can log on to the Automation Services server component only from an instance of QPS Connect Client that is running on the same computer as the server component.

- When saving output to the file system, you can save the output only to a UNC Path on the same computer as the server component.

To install the client components of Automation Services on Windows 7:

1 Make sure QPS Connect Client 8.1 is installed.

2 Make sure IIS is up and running.

3 Double-click the "Automation Services.exe" icon in the "Client" folder and follow the instructions on the screen.

4 When the **Server Information** screen displays, enter the domain name or IP address and the port number of the computer where Automation Services server component will run.

5 Give the `IIS_IUSRS@[server computer name]` object **Full Control** privileges for the "Automation Services for QPS - Server" folder.

➡ It is critical to specify the server computer's domain name with the "IIS_IUSRS" object.

6 Recycle the Automation Services application pool and restart the Automation Services Web site.

Installing client components

To install the client components of Automation Services:

1 Make sure QPS Connect Client 8.1 is installed.

2 Double-click the "Automation Services.exe" icon in the "Client" folder and follow the instructions on the screen.

3 When the **Server Information** screen displays, enter the domain name or IP address and the port number of the computer where Automation Services server component will run.

Configuring QuarkXPress Server

To set up QuarkXPress Server for use with Automation Services:

• Set up all instances of QuarkXPress Server to use a common document pool.

• If realm authentication is enabled, give all instances of QuarkXPress Server the same realm authentication.

• Enable the ability to return QuarkXPress projects for all instances of QuarkXPress Server (**QuarkXPress Server > Server Configuration > Server** tab > uncheck **Disable QuarkXPress Document Return**).

• Give all instances of QuarkXPress Server the permission to create folders in the document pool (**QuarkXPress Server > Server Configuration > Server** tab > check **Generate Hierarchy On Document Upload**).
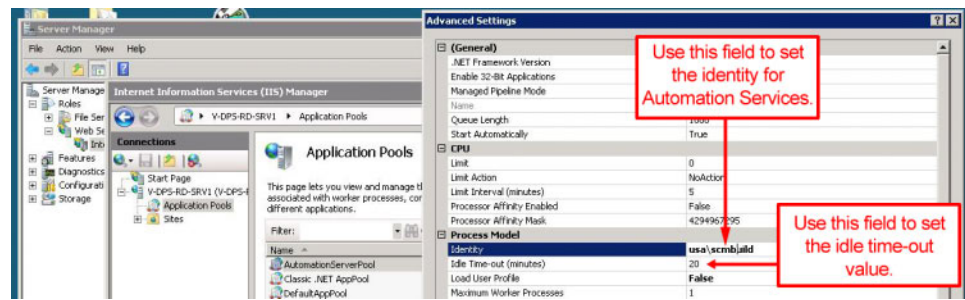
Setting access privileges and idle time-out

To work properly, Automation Services must have sufficient access privileges to all of the save locations that you have specified in your automation profiles. It must also have a time-out value high enough to keep it running when there are no incoming requests.

To set up access privileges and idle time-out:

1 Choose or create a user account to be used by Automation Services.

2 In the IIS management console, right-click on the application pool for Automation Services, choose **Advanced Settings**, and set the identity to the Automation Services user account.

IIS management console with Automation Services application pool displayed. The **Advanced Settings** dialog box displays when you right-click the **AutomationServerPool** icon and choose **Advanced Settings**.

3 In the same dialog box, set **Idle Time-out (minutes)** to `1700`. This enables the server to keep executing automation profiles even if a long time has elapsed since the last client request.

4 Give the Automation Services user account **Co-owner** rights to the "AutomationServices_Data" folder in the Automation Services application folder. This step ensures that automation profiles can be successfully deployed.

5 Give the Automation Services user account **Co-owner** rights to all folders that automation profiles need to write to.

➡ It is *not* sufficient to assign the IIS "Network Service" user account to the Automation Services output folders and give it full control.

Uninstalling

You can remove Automation Services software by using **Control Panel > Add or Remove Programs**.

Contacting Quark

If you have questions about installing, configuring, or using this software, please contact Quark Inc.

In the Americas

For technical support, please call 800.788.0045 between 7:00 a.m. and 6:00 p.m. Mountain Time, Monday through Friday, or send an e-mail message to *enterprisesupport@quark.com*.

For product information, please visit the Quark® Web site at *www.quark.com*, or send an e-mail message to *cservice@quark.com*.

Outside the Americas

English technical support is available by phone between 8.30 and 17.30 Central European Time, Monday to Friday, or by sending an e-mail message to *enterprisesupport@quark.com*.

From Austria, Belgium, Denmark, France, Germany, Ireland, Luxembourg, The Netherlands, and the United Kingdom, please call 00800 1787 8275. From all other countries outside the Americas, please call:

- Belgium: 0800.77.296
- France: 0800.91.3457
- Germany: 0800.180.0101
- Ireland: 1800.55.0241
- Italy: 800.87.4591
- Japan: 00531.13.1492
- Luxembourg: 8002.3861
- Norway: 800.1.4398
- Spain: 900.941.328
- Sweden: 020.790.091
- Switzerland: 0800.55.7440

• United Kingdom: 0808.101.7082

For product information, please visit the Quark Web site at *euro.quark.com*, or send an e-mail message to *eurocservice@quark.com*.

In Australia

For technical support, please call 1 800.670.973 between 10:00 a.m. and 7:00 p.m. Sydney Time (AEST), Monday through Friday, or send an e-mail message to *austechsupp@quark.com*.

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